

# Sprint Review Notes

## Group Start Policy

- This feature is for iMIS Professional
- Members who buy a member type are put into a group
- Modify membership begin date through group settings
- Helpful for allowing new members to get membership pricing in events
- Modifying start date makes member 'active' in the membership group
- Allow member benefits to start immediately upon joining

The screenshot shows the 'Edit Group' window with the following settings:

- Start Policy:**
  - Set Start Date equal to the date member was added to the group
  - Set Start Date equal to first day of the month member was added to the group
  - After day:  set Start Date equal to the first day of the next month
  - Grant membership benefits immediately upon joining
- Renewal Policy:**
  - Group Membership is subject to renewal billings
  - Renewal selection criteria:**
    - When processing group renewals, the following information will be used to determine who is billed for their membership and what products they are billed for:
    - Include inactive members
    - Include members expiring within:  Days
  - Roles to be renewed:**
    - Table with columns: ROLE, RENEWAL PRODUCT, Select, Delete
    - Row: Member, Natural Explorers Annual Membership

## NEW! Content Redirect Rules

- Available in iMIS Professional and Enterprise
- Choose whether to redirect based on listed conditions
- Define redirect rule:
  - Logged in user = ID in url
  - Selected contact = On Behalf Of
  - Group member = Is active group member
  - Dynamic group member from IQA = Is active group member
- Available on any content record
- Can combine multiple conditions with and/or logic

The screenshot shows a dropdown menu with the following options:

- Is authenticated
- Is unauthenticated
- Is staff
- Is system administrator
- Is member
- Is non-member
- Is member of group
- Is not selected contact** (highlighted)
- Has read access
- Has update access
- Has role
- Sources**
  - CsContact
  - CsName\_Staff
  - CsNameFin
  - CultivatingFor
  - EducationInProgress
  - FundraisingProfileDonorData
  - Organization\_Demo
  - Profile\_Page
- Is authenticated

- Limitation- redirect rules do not export with content record

The screenshot displays the 'Content designer' interface for a 'Published' status. The 'Redirect rules' tab is active, showing a configuration for a 'Party' type. The 'Conditions for redirect' are set to 'Define rules'. The 'Redirect rules' section is divided into two parts. The first part has two conditions: 'Logged in user' with 'CsContact' and 'Member Type' equal to 'Student Member', and 'Logged in user' with 'CsContact' and 'Member Type' equal to 'Retired Member'. The 'Redirect to' is set to 'URL or Content' with the value '@!Samples/Donor/Get\_Involved\_Get\_Involved'. The second part has one condition: 'Logged in user' with 'CsContact' and 'Member Type' equal to 'Non Member'. The 'Redirect to' is set to 'URL or Content' with the value 'JoinNow'.

## Set Committee Status on Staff Site

- For iMIS Professional
- Functionality migrated from Desktop to Staff Site
- Can now update status (Active, Inactive) for committees and committee members