Importing Memberships Or Passes In AMS To Generate Orders

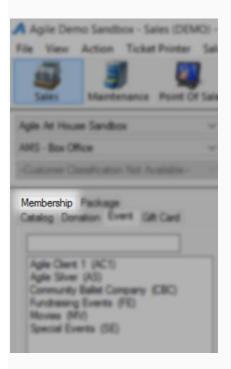
You now can import memberships or passes in the sales application with each time on its own order.

1. Log in to Agile in the AMS Sales area.

Username			
Password			
Domain	sandbox		
	Sales	O Admin	Gate Contro

2. Click on the Membership tab and choose the Membership or Pass program from the

list.



Aglie Demo Sanabox - Sales (DEMO) - Po	32	2 4 2
Igh In Your Serlins		
Membership (MEM)	Name Sandbox Membership	

3. Right Click on the Membership and select Import.

Name	Sales L
Sandbox Membership	Description List For Approval
	Import

4. Click on Import Example and save the spreadsheet to your Desktop



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 Dropbox OneDrive This PC Desktop Documents Downloads Music Pictures 		No items m	atch y	your search.		
OS (C:)						
 Videos OS (C:) Network File name: 	✓ MembershipImportExample					~

5. Fill out the **Member/Pass** information in the spreadsheet.

Note: Not all fields are required for the import. Optional columns are marked in the

header.

Member Number (optional)	Membership Level	Membership Price Type	Barcode (optional)	Join Date	Expire Date	Approval Status	Active	Member Notes (optional)
	Gold Member	Gold Member		2/20/2016	2/20/2017	TRUE	TRUE	
	Gold Member	Gold Member		2/20/2016	2/20/2017	TRUE	TRUE	
	Silver Member	Silver Member		2/20/2016	2/20/2017	TRUE	TRUE	
	Silver Member	Silver Member		2/20/2016	2/20/2017	TRUE	TRUE	

6. Save and close the completed spreadsheet.

7. When you are ready to import the **Members/Passholders**, go back to the **Membership Program** in AMS.

A Agile Demo Sandbox - Sales (DEMO) - Po	owered by Agrie Ticketing	
Contra Contract (B) (and	Name Sandbox Membership	
Membership (MEM)		

8. Right click on the **Membership Program** and select **Import**.

Description List For Approval	*1embershi
Import	
	List For Approval

9. Click on the **Load File** button and select the completed spreadsheet.



10. All of the **Member/Passholder** information will appear within the window. You can scroll through to make any last-minute edits and check for any errors.

A Membership Import: Sandbox Membership
Membership

Memb

Sliding

False

Membership Leve Gold Member Gold Member Silver Member

Silver Member

Sales Line Type

Expira

on Type

Member #

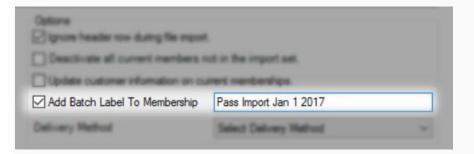
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Add Memi

	ery metriou	Select Deliv			Add Ba								
Suffix	Last Name	MI	First Name	Prefix	Customer #	Member Notes	Active	Approved	Expiration Date	Date Joined	Barcode	Membership Price Type	evel
Comix	Smith		John		Costoner #	Hernoer Hotes			2/20/2017	2/20/2016	Durcose	Gold Member	
	Ingalls		Charles						2/20/2017	2/20/2016		Gold Member	
	Ingalls		Caroline						2/20/2017	2/20/2016		Silver Member	
	Ingalls Wilder		Laura						2/20/2017	2/20/2016		Silver Member	
	Wilder		Almonzo										
							N N						

11. Check the box next to Add Batch Label to Membership and create a unique code that

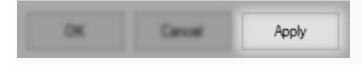
will appear on the response data spread sheet after the import.



12. Select a **Delivery Method** from the drop down.

Delivery Method	Select Delivery Method	~
	Select Delivery Method	
	Will Call - No Charge	

13. Click on Apply and then OK.



- 0 ×

Apply

14. The **Progress** window will appear.

Progress	
Progress: 100%	
Operation Started Importing/Updating 5 records. Starting import operation. Import operation complete 4 New members imported 5 New customers imported Saving results file Operation Completed	
	Close

15. Once you have reached 100% the Save Import Results pop up window will

eve Import Results				>
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鹶 Network	~ <			
File name:	MembershipImportResults (2	2017-02-20 084655)		
Save as type:	Excel Workbook (*.xlsx)			
Hide Folders			Save	Cancel

appear. Save the results file to your computer for future reference.

16. You can now go to **Maintenance** or the **Fulfillment Batch** to see that these orders have been processed and are ready to be fulfilled.

Sees Mantenana Point Of Sale	Case Order Override	tener Menter to	nore Contact Rem List Payment	Refered				
Age in these Section	Prove C	E-mit	24.					
Gatore Gasticator Na Autore	Order #		Last orders for Agle At House Se					
Catalog Devator Event Gill Card Merchentro Package Scratch Fad Online	Castoner # Contract None		Last orders you solid or maintained Bercode Membership Member H List orders for an event	4 4 F				
	Name	Order #	Order Date	Og	Buyer Type	Obr	Sate	Owned
	Ingalls Wilder, Laura	138089	2/20/2017 8:48 AM	Agile Art House Sandbox	AMS - Box Office	Manufadd	MO	2/25/2017
	Ingalls, Caroline	138088	2/20/2017 8:48 AM	Agile Art House Sandbox	AMS - Box Office	Stockholm	-	2/20/20171
	Ingalls, Charles	138087	2/20/2017 8:48 AM	Agile Art House Sandbox	AMS - Box Office	Stockholm	98	2/25/201
	Smith, John	139096	2/20/2017 8-48 AM	Agile Art House Sandbox	AMS - Box Office	Herritage	TN	2/25/2017
	Elter, Hope	138085	2/17/2017 3-42 PM	Agle At House Sandhox	AMS - Box Office	ANTIOCH	75	2/17/201
	Aple. Jos	137631	5/1/2016 10.23 AM	Agle At House Sandhox	AMS - Box Office	HERMITAGE	TN	8/1/2016
	Agle	137632	9/1/2016 10:25 AM	Agle At House Sandbox	AMS - Box Office	HERMITAGE	TN	\$/1/2016
	Agle. Joe	137630	\$/1/2016 10 19 AM	Agle At House Sandhox	AMS - Box Office	HERMITAGE	TN	\$/1/2014
	Agin . Jon	137629	5/1/2016 10 18 AM	Agle At House Sandhox	AMS - Box Office	HERMITAGE	TN	\$/1/2016
	Buches	137628	\$/1/2016 10 16 AM	Agle At House Sandbox	AMS - Box Office			\$/1/2016
	Agin. Jon	137488	5/6/2016 ± 41 AM	Agle At House Sandhox	AMS - Box Officer	HERMITAGE	TN	5/5/2014
	Stewart, Tory	137469	4/24/2016 9:09 PM	Agle At House Sandhox	AMS - Box Office	LAKE JACKSON	TX	4/24/201
	Copeland, Wesley (Brazow)		4/24/2016 5-02 PM	Agle At House Sandbox	AMS - Box Officer	CLUTE	TX	4/24/201
	BorOffice	127225	2/5/2016 9:54 AM	Agle At House Sandhox	AMS - Box Office			2/5/2014
	Booffice	127224	2/5/2016 3:50 AM	Agle At House Sandhox	AMS - Box Office			2/5/2014
	BosOfice	127223	2/5/2016 9-49 AM	Agle At House Sandbox	AMS - Box Office			2/9/2014
	Booffice	127152	1/20/2016 12:17 PM	Agle At House Sandbox	AMS - Box Office			1/25/201
Order 8 (E)	Buches	127151	1/20/2016 12:06 PM	Agle At House Sandbox	AMS - Box Office			1/20/201
Ren Court @ Ren(x)	Booffice	127004	12/23/2015 1:12 PM	Agle At House Sandhox	AMS - Box Office			12/23/281
Subscrat \$5.00	BooOfice	127003	12/23/2015 12:56 PM	Agle At House Sandhos	AMS - Box Office			12/23/28

A Membership Fulfilling

Interior Address Sect.	Ondex To Full									
Contract of Contract Contract	Delivery	Order #	BayerType	Customer #	Custome Name	Manhership	MembershipLavel	Mandon Z	Member Name	Balance Dat
Agle Ad House Sandhox 🛛 👻	Standard Mail	116700	AMS - Box Office	74009	Firstone, Fred	Sandhox Membership	Gold Member	50635	Flinstone, Fred Flintatore, Villing	80.00
Merbenho	Standard Mail	116727	AMS - Box Office	74019	Harper, Sabrina	Sandhox Membership	Gold Member	50638	Harper, Salerina	\$0.00
Sandhox Handsening	Standard Mail	126977	AMS - Box Office	74008	Agle, Joe	Sandhox Membership	Gold Member	50662	Aple, Joe Depp, Argelina	80.00
	Standard Mail	137469	AMS - Box Office	94347	Stewart, Tony	Sandhox Mentership	Gold Member	2000001	Stevart, Tony Stevart, Tony	80.00
	Standard Mail	137469	AMS - Box Office	94347	Stevart, Tony	Sandhox Mandamahip	Gold Member	50741	Severt Tory Severt Tory Severt Tory	\$0.00
	Standard Mail	137632	AMS - Box Office	84109	Aple Ticketing Solutions	Sandhox Membership	Gold Member	50765	Agin Jill Agin John	\$0.00
	U HE Call	106665	AMS- Box Office	73996	Roubon, Becky	Sandhox Membership	Gold Member	40525	Roubon Becky	80.00
	U HIE Call	138085	AMS - Box Office	94582	Biber, Hope	Sandhox Membership	Bronze Member	50865	Siber, Hope	\$0.00
	Will Call	138086	AMS - Box Office	94583	Smith, John	Sandbox Membership	Gold Member	50866	Smith, John	\$0.00
	Will Call	138087	AMS - Box Office	94584	Ingalls, Charles	Sandbox Membership	Gold Member	50867	Ingalls, Charles	\$0.00
	Will Call	138088	AMS - Box Office	94585	Ingalls, Caroline	Sandbox Membership	Silver Member	50868	Ingalls, Caroline	\$0.00
	Will Call	138089	AMS - Box Office	94586	Ingalls Wilder, Laura	Sandbox Membership	Silver Member	50869	Ingalls Wilder, Laura	\$0.00

Options | Hide Orders 1995: Balance Due

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