Membership Batch Fulfillment

1. Log In to Sales.

2. Make sure that you are cashed in before starting the fulfillment process. See "<u>How to</u> <u>Cash In and Use AMS Sales to Create a Daily User Batch</u>" for further instructions.

3. Select **Support Functions** from the menu at the top of the screen. Hover the mouse over **Fulfillment** and select **Membership**. (Image 2)

File View Action Ticket Printer Sales	Mode Support Functions Help	
	Reporting	
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	Free Form Tickets	Package
Agile Admin - Regional 🗸 🗸	Phone: E-ma	Membership Zip:
Select Buyer Type V		Gift Card
-Customer Classification Not Available-	Regional Bulletin Board	



4. Select the membership program that you want to print. (Image 3)



Image 3

5. Select all orders that need to be fulfilled. If you want to print the entire batch, click

the **Green Check Mark** icon at the bottom of the screen. Otherwise, check the box next to each order needing to be fulfilled. (Image 4)

Orders To Fulfill						
Delivery	Order#	BuyerType	Customer#	Customer Name	Membership	Balance Due
 USPS First Class 	5129	Web - Advanced	23679	Smith, Joe	Film Circle	\$0.00
 USPS First Class 	5133	Web - Advanced	23679	Smith, Joe	Film Circle	\$0.00
 USPS First Class 	5178	Web - Advanced	22241	Steward, Richard	Film Circle	\$0.00
 USPS First Class 	5240	Web - Advanced	23679	Smith, Joe	Film Circle	\$0.00
 USPS First Class 	5251	Web - Advanced	22241	Steward, Richard	Film Circle	\$0.00
 USPS First Class 	5283	Web - Advanced	23679	Smith, Joe	Film Circle	\$0.00
 USPS First Class 	5373	Web - Advanced	22241	Steward, Richard	Film Circle	\$0.00
 USPS First Class 	5386	Web - Advanced	22241	Steward, Richard	Film Circle	\$0.00
 USPS First Class 	5393	Web - Advanced	22241	Steward, Richard	Film Circle	\$0.00
 USPS First Class 	5400	Web - Advanced	22241	Steward, Richard	Film Circle	\$0.00
 USPS First Class 	5430	Web - Advanced	22241	Steward, Richard	Film Circle	\$0.00
 USPS First Class 	5445	Web - Advanced	22241	Steward, Richard	Film Circle	\$0.00
 USPS First Class 	5474	Web - Advanced	23200	burkett, Shane	Film Circle	\$0.00
 USPS First Class 	5586	Web - Advanced	23679	Smith, Joe	Film Circle	\$0.00
 USPS First Class 	5830	Web - Advanced	22241	Steward, Richard	Film Circle	\$0.00





6. Click the **Ticket** icon at the bottom of the screen.

7. The **Fulfillment Options** window will open. Uncheck the **Print Payment Receipts** box. Select the **Print Membership** radial button. From the list of **Available Printers**, select a

printer and move it to the **Selected Printers** list. Click **OK** to start printing your membership cards/passes. (Image 5)

Selected Options		
Header Format	No Header Print	*
Order Receipt	No Receipt Print	~
Print Payment Receipts	✓	
Sort Orders By	Last Name	¥
Batch Description	Fulfilling orders for Film Circle.	
How to fulfill memberships	O Save membership info to file	
	C:\Users\stewardhc\Documents\Me	Browse
Available Printers	O Print memberships Selected Printers	
	> Printer (Tickets) >>	
	<	
Fulfillment Summary		
Form Types: Card 0 Headers 1 Tickets/Vouchers 0 Receipts 1 Total		
	ок	Cancel

Image 5

8. Some organizations send new members **Welcome Letters** to thank them for their purchase, detail their benefits, and give them their membership card. To print the letters, switch to **Administration**. Click **File**, hover over **Switch**, and select **Administration**. (Image 6)

File	View Action T	icket Printer Sales	Mode Support Functions Help	
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	Sign Out	Gate Control	er Override Customer Member Remove Contact Item	List Payment
	Exit			
Agil	e Admin - Kegional	· · · ·	Phone: E-mail:	Zip:
Se	lect Buyer Type	¥		
Customer Classification Net Available		lat Available-	Regional Bulletin Board	
Dor	nations ent Catalog Memebe	rship Packages		



9. Select the **Corporate Organization** icon select **Emails and Letters**. (Image 7)

. Click the **Customer** folder and





10. In the Emails and Letters box, double-click the Welcome Letter. (Image 8)

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11. In the Email / Letter pop-up window, click Set Parameters. (Image 9)

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Image 9

12. In the **Set Parameters** pop-up window, select the batch that you printed in steps 2 through 6 and click **OK.** (Image 10)

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Fulfillment Batch	
Show batches for last 1 Week	¥
	~
6/15/2015 8:26 AM - 117166 - agilefulfill 6/15/2015 8:24 AM - 117165 - anilefulfill	
6/12/2015 9:52 AM - 117155 - agilefulfill 6/12/2015 9:52 AM - 117155 - agilefulfill	
6/11/2015 8:42 AM - 117149 - agilefulfill	
6/11/2015 8:40 AM - 11/148 - agilefulfill 6/10/2015 8:31 AM - 117130 - agilefulfill	
6/10/2015 8:29 AM - 11/129 - agilefulfill 6/9/2015 9:09 AM - 117124 - agilefulfill	
6/9/2015 9:09 AM - 117123 - agilefulfill	
	OK Cancel

Image 10

13. Click the **Preview** tab. Then, select the **Show All** button. This will show all the welcome letters for this batch of fulfillment. Finally, click **Print.** (Image 11)

A Email / Letter	_		\times
Agile Theatre			
Data Set Email / Letter Body Description Preview To: From:			
Subject:			
Attachment:			_
			^
Previous Next Show All Print Hide Records Having Email Address		Send Tes	► st
Preview Data O Complete Data Add Activity Log Send OK	Cancel	Apply	I)

14. A PDF of all the letters will open. Click the printer icon to print to your selected document printer.