

Membership Batch Fulfillment

1. [Log In](#) to Sales.
2. Make sure that you are cashed in before starting the fulfillment process. See "[How to Cash In and Use AMS Sales to Create a Daily User Batch](#)" 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)

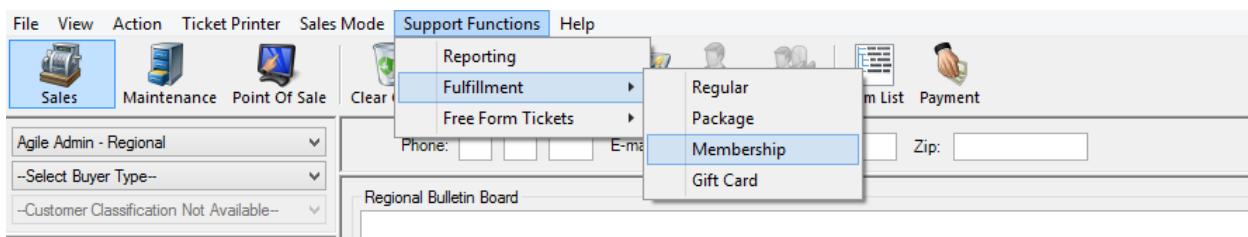


Image 2

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

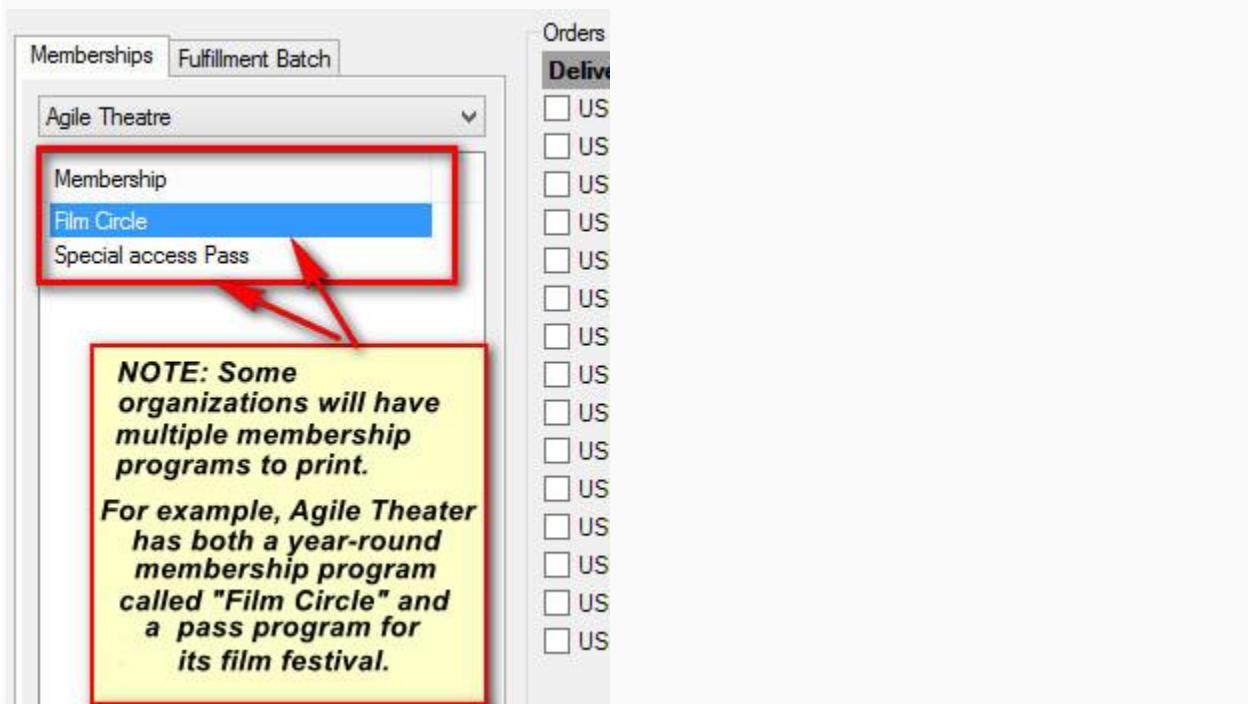


Image 3

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 |
| <input checked="" type="checkbox"/> USPS First Class | 5129 | Web - Advanced | 23679 | Smith, Joe | Film Circle | \$0.00 |
| <input checked="" type="checkbox"/> USPS First Class | 5133 | Web - Advanced | 23679 | Smith, Joe | Film Circle | \$0.00 |
| <input checked="" type="checkbox"/> USPS First Class | 5178 | Web - Advanced | 22241 | Steward, Richard | Film Circle | \$0.00 |
| <input checked="" type="checkbox"/> USPS First Class | 5240 | Web - Advanced | 23679 | Smith, Joe | Film Circle | \$0.00 |
| <input checked="" type="checkbox"/> USPS First Class | 5251 | Web - Advanced | 22241 | Steward, Richard | Film Circle | \$0.00 |
| <input checked="" type="checkbox"/> USPS First Class | 5283 | Web - Advanced | 23679 | Smith, Joe | Film Circle | \$0.00 |
| <input checked="" type="checkbox"/> USPS First Class | 5373 | Web - Advanced | 22241 | Steward, Richard | Film Circle | \$0.00 |
| <input checked="" type="checkbox"/> USPS First Class | 5386 | Web - Advanced | 22241 | Steward, Richard | Film Circle | \$0.00 |
| <input checked="" type="checkbox"/> USPS First Class | 5393 | Web - Advanced | 22241 | Steward, Richard | Film Circle | \$0.00 |
| <input checked="" type="checkbox"/> USPS First Class | 5400 | Web - Advanced | 22241 | Steward, Richard | Film Circle | \$0.00 |
| <input checked="" type="checkbox"/> USPS First Class | 5430 | Web - Advanced | 22241 | Steward, Richard | Film Circle | \$0.00 |
| <input checked="" type="checkbox"/> USPS First Class | 5445 | Web - Advanced | 22241 | Steward, Richard | Film Circle | \$0.00 |
| <input checked="" type="checkbox"/> USPS First Class | 5474 | Web - Advanced | 23200 | burkett, Shane | Film Circle | \$0.00 |
| <input checked="" type="checkbox"/> USPS First Class | 5586 | Web - Advanced | 23679 | Smith, Joe | Film Circle | \$0.00 |
| <input checked="" type="checkbox"/> USPS First Class | 5830 | Web - Advanced | 22241 | Steward, Richard | Film Circle | \$0.00 |


↓

Image 4

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)

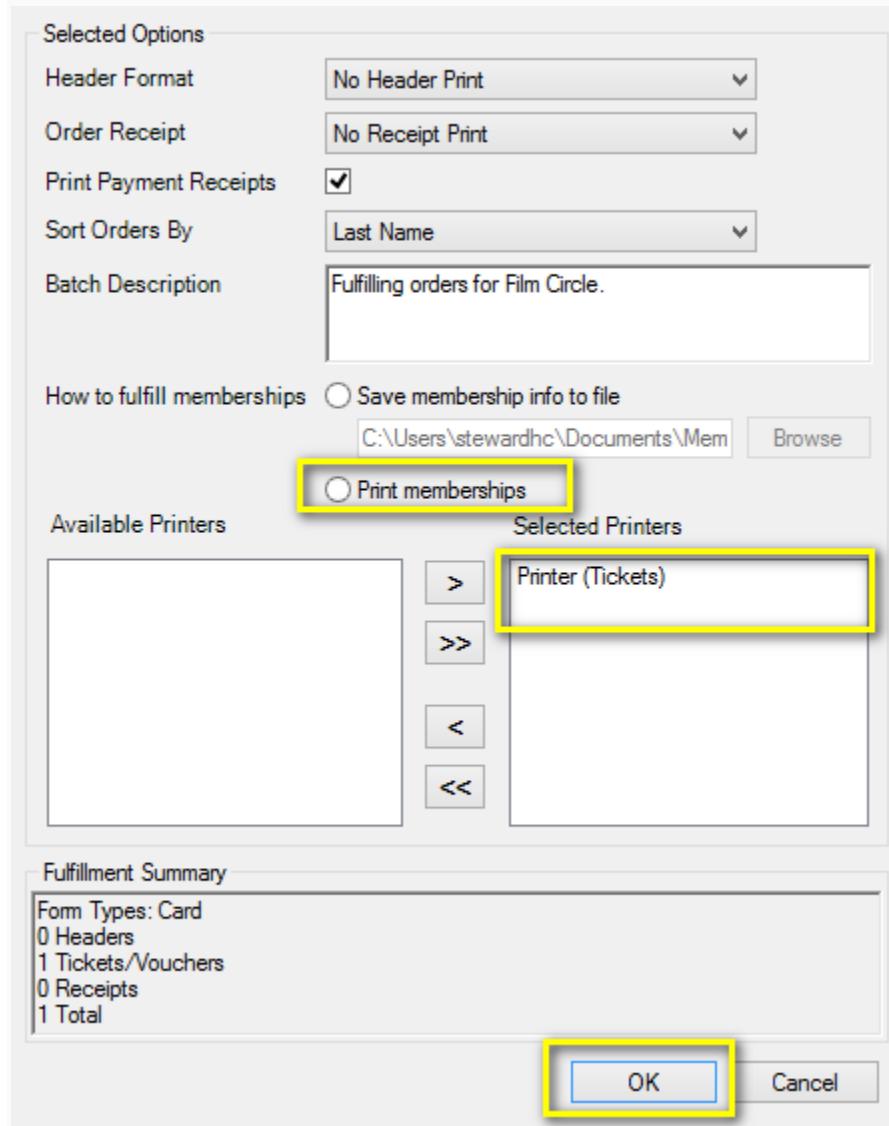


Image 5

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)

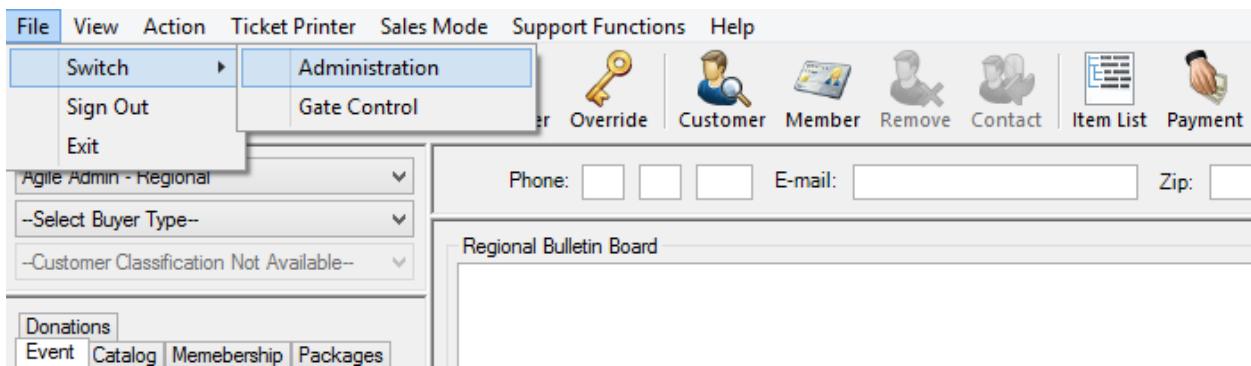


Image 6



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

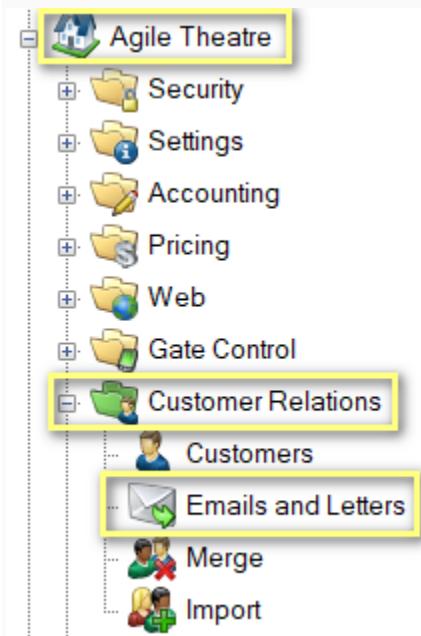


Image 7

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

| Emails and Letters | Subject | Data Set | Last Activity | Description |
|--------------------|-------------------|--------------------|---------------|--|
| | Membership Letter | Membership | 1/3/2020 | Membership letter to new members after member card |
| | Welcome Letter | Membership Letters | 1/3/2020 | Letter to print and attach member cards to. |

Image 8

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

Email / Letter

Agile Theatre

DataSet **Email / Letter Body** **Description** **Preview**

Set Parameters **Export Data**

| MemberID | MemberFirstName | MemberLastName | MemberEmail | MemberAddress | MemberCity | MemberState | MemberZip | MemberPhone | MemberFax |
|----------|-----------------|----------------|--------------------------------|-----------------|------------|-------------|-----------|-------------|-----------|
| 1 | John | Doe | John.Doe@agiletheatre.com | 123 Main Street | Anytown | CA | 98765 | 555-1234 | 555-1234 |
| 2 | Jane | Doe | Jane.Doe@agiletheatre.com | 123 Main Street | Anytown | CA | 98765 | 555-1234 | 555-1234 |
| 3 | John | Smith | John.Smith@agiletheatre.com | 123 Main Street | Anytown | CA | 98765 | 555-1234 | 555-1234 |
| 4 | Jane | Smith | Jane.Smith@agiletheatre.com | 123 Main Street | Anytown | CA | 98765 | 555-1234 | 555-1234 |
| 5 | John | Johnson | John.Johnson@agiletheatre.com | 123 Main Street | Anytown | CA | 98765 | 555-1234 | 555-1234 |
| 6 | Jane | Johnson | Jane.Johnson@agiletheatre.com | 123 Main Street | Anytown | CA | 98765 | 555-1234 | 555-1234 |
| 7 | John | Williams | John.Williams@agiletheatre.com | 123 Main Street | Anytown | CA | 98765 | 555-1234 | 555-1234 |
| 8 | Jane | Williams | Jane.Williams@agiletheatre.com | 123 Main Street | Anytown | CA | 98765 | 555-1234 | 555-1234 |
| 9 | John | Harris | John.Harris@agiletheatre.com | 123 Main Street | Anytown | CA | 98765 | 555-1234 | 555-1234 |
| 10 | Jane | Harris | Jane.Harris@agiletheatre.com | 123 Main Street | Anytown | CA | 98765 | 555-1234 | 555-1234 |
| 11 | John | Miller | John.Miller@agiletheatre.com | 123 Main Street | Anytown | CA | 98765 | 555-1234 | 555-1234 |
| 12 | Jane | Miller | Jane.Miller@agiletheatre.com | 123 Main Street | Anytown | CA | 98765 | 555-1234 | 555-1234 |
| 13 | John | Wilson | John.Wilson@agiletheatre.com | 123 Main Street | Anytown | CA | 98765 | 555-1234 | 555-1234 |
| 14 | Jane | Wilson | Jane.Wilson@agiletheatre.com | 123 Main Street | Anytown | CA | 98765 | 555-1234 | 555-1234 |
| 15 | John | Anderson | John.Anderson@agiletheatre.com | 123 Main Street | Anytown | CA | 98765 | 555-1234 | 555-1234 |
| 16 | Jane | Anderson | Jane.Anderson@agiletheatre.com | 123 Main Street | Anytown | CA | 98765 | 555-1234 | 555-1234 |
| 17 | John | Moore | John.Moore@agiletheatre.com | 123 Main Street | Anytown | CA | 98765 | 555-1234 | 555-1234 |
| 18 | Jane | Moore | Jane.Moore@agiletheatre.com | 123 Main Street | Anytown | CA | 98765 | 555-1234 | 555-1234 |
| 19 | John | Parker | John.Parker@agiletheatre.com | 123 Main Street | Anytown | CA | 98765 | 555-1234 | 555-1234 |
| 20 | Jane | Parker | Jane.Parker@agiletheatre.com | 123 Main Street | Anytown | CA | 98765 | 555-1234 | 555-1234 |
| 21 | John | Reed | John.Reed@agiletheatre.com | 123 Main Street | Anytown | CA | 98765 | 555-1234 | 555-1234 |
| 22 | Jane | Reed | Jane.Reed@agiletheatre.com | 123 Main Street | Anytown | CA | 98765 | 555-1234 | 555-1234 |
| 23 | John | Evans | John.Evans@agiletheatre.com | 123 Main Street | Anytown | CA | 98765 | 555-1234 | 555-1234 |
| 24 | Jane | Evans | Jane.Evans@agiletheatre.com | 123 Main Street | Anytown | CA | 98765 | 555-1234 | 555-1234 |
| 25 | John | Allen | John.Allen@agiletheatre.com | 123 Main Street | Anytown | CA | 98765 | 555-1234 | 555-1234 |
| 26 | Jane | Allen | Jane.Allen@agiletheatre.com | 123 Main Street | Anytown | CA | 98765 | 555-1234 | 555-1234 |
| 27 | John | Wilson | John.Wilson@agiletheatre.com | 123 Main Street | Anytown | CA | 98765 | 555-1234 | 555-1234 |
| 28 | Jane | Wilson | Jane.Wilson@agiletheatre.com | 123 Main Street | Anytown | CA | 98765 | 555-1234 | 555-1234 |
| 29 | John | Anderson | John.Anderson@agiletheatre.com | 123 Main Street | Anytown | CA | 98765 | 555-1234 | 555-1234 |
| 30 | Jane | Anderson | Jane.Anderson@agiletheatre.com | 123 Main Street | Anytown | CA | 98765 | 555-1234 | 555-1234 |
| 31 | John | Moore | John.Moore@agiletheatre.com | 123 Main Street | Anytown | CA | 98765 | 555-1234 | 555-1234 |
| 32 | Jane | Moore | Jane.Moore@agiletheatre.com | 123 Main Street | Anytown | CA | 98765 | 555-1234 | 555-1234 |
| 33 | John | Parker | John.Parker@agiletheatre.com | 123 Main Street | Anytown | CA | 98765 | 555-1234 | 555-1234 |
| 34 | Jane | Parker | Jane.Parker@agiletheatre.com | 123 Main Street | Anytown | CA | 98765 | 555-1234 | 555-1234 |
| 35 | John | Reed | John.Reed@agiletheatre.com | 123 Main Street | Anytown | CA | 98765 | 555-1234 | 555-1234 |
| 36 | Jane | Reed | Jane.Reed@agiletheatre.com | 123 Main Street | Anytown | CA | 98765 | 555-1234 | 555-1234 |
| 37 | John | Evans | John.Evans@agiletheatre.com | 123 Main Street | Anytown | CA | 98765 | 555-1234 | 555-1234 |
| 38 | Jane | Evans | Jane.Evans@agiletheatre.com | 123 Main Street | Anytown | CA | 98765 | 555-1234 | 555-1234 |
| 39 | John | Allen | John.Allen@agiletheatre.com | 123 Main Street | Anytown | CA | 98765 | 555-1234 | 555-1234 |
| 40 | Jane | Allen | Jane.Allen@agiletheatre.com | 123 Main Street | Anytown | CA | 98765 | 555-1234 | 555-1234 |

Preview Data Complete Data Add Activity Log Send OK Cancel Apply

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)

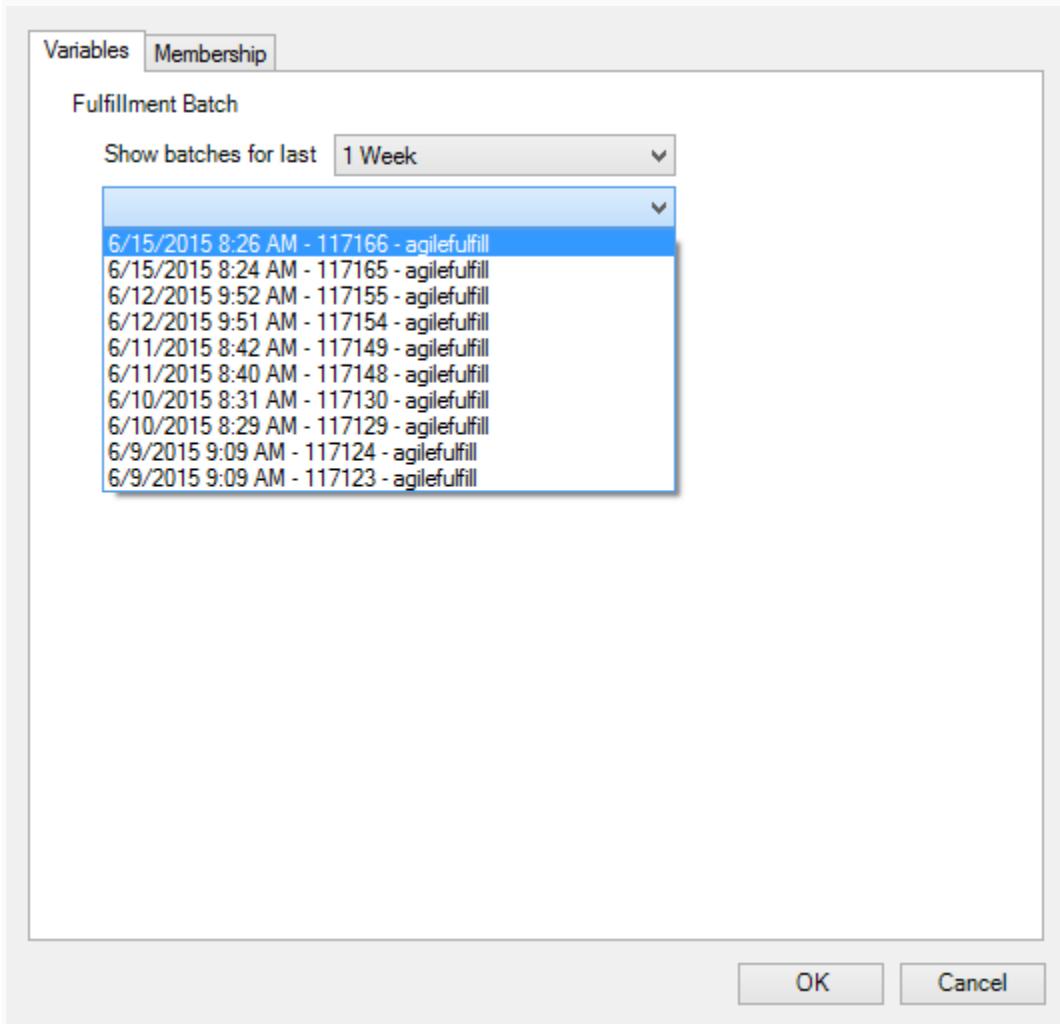


Image 10

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)

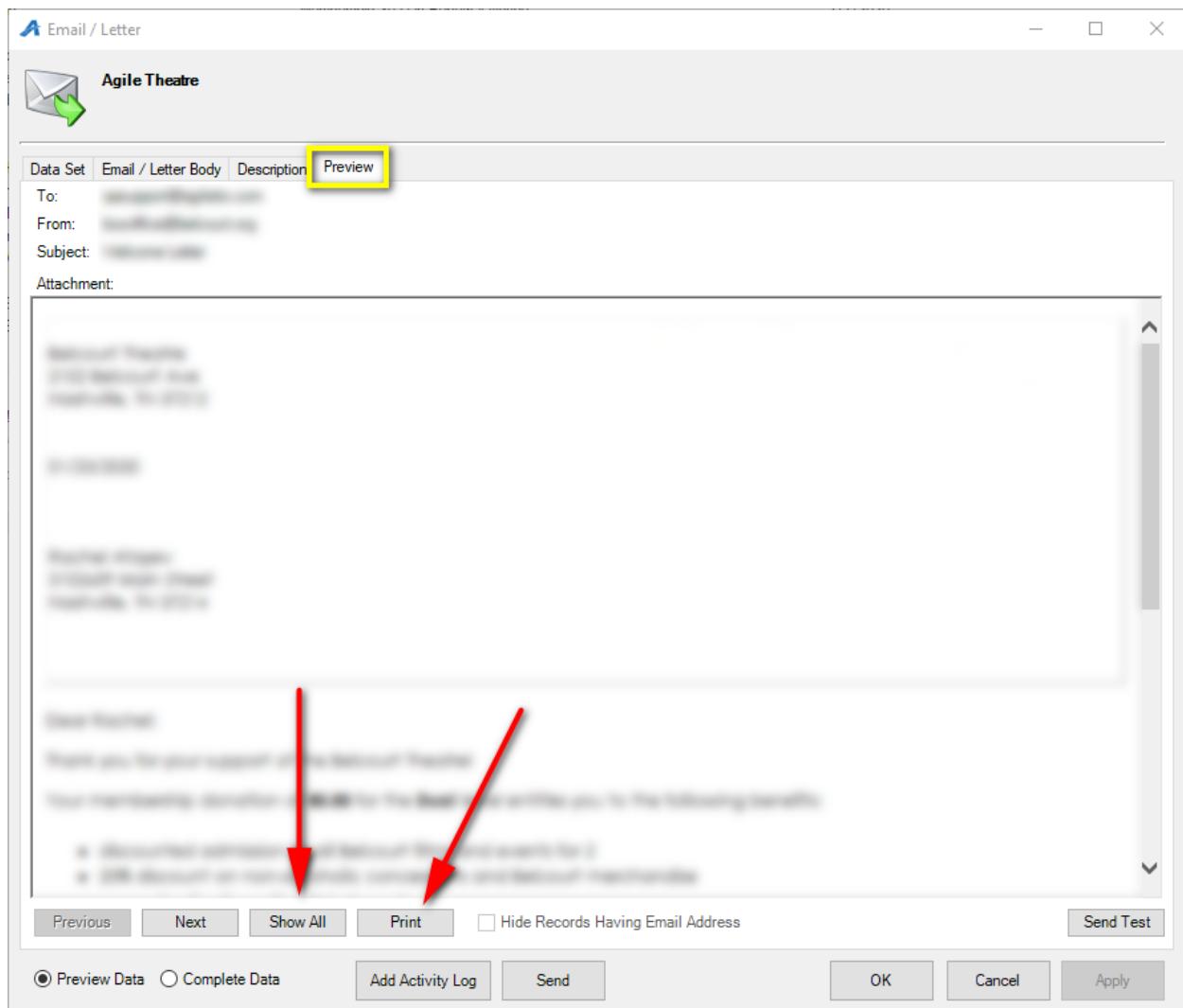


Image 11

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