



DATA EXCHANGE

for

CSV FILE IMPORT

December 9, 2010

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Introduction

This guide will help you to become familiar with the basic concepts required to use the VISTA Data Exchange Utility, also referred to as **DEX**. The utility has the capability of retrieving data from external sources via two separate methods:

CSV File - A flat file created from a 3rd party source that contains comma-separated (CSV) fields of data. A mapping tool is used to equate the fields. Files must be in CSV format only. Primary as well as additional cardholders are supported under certain conditions.

RE* SQL Link - An external RAISER'S EDGE database running on the Microsoft SQL Server platform and that is accessible on your network. This method allows for additional cardholders using the Relationships link in RE, not the Member Card link. Please note that VISTA does not write data back to Raiser's Edge. This type of routine is discussed in the document entitled **DEX RE SQL GUIDE** which can be located online at <http://www.tmvista.com/Support.asp>.

Note: * This document's use of the term RE refers to Blackbaud™ Raiser's Edge database.

Minimum Requirements

The table below lists the minimum requirements necessary to use the Data Exchange Utility.

Requirement	Description
VISTA Version	Version 6.0 or later
Security Access	ID CARD Setup and DATA EXCHANGE executable
Required Modules	Back Office with Membership*
SQL Login for VISTA	You will need to specify the <u>SQL Server</u> username and password. Contact your system admin for assistance.

Note: If you do not have this module, please contact your Account Services Manager at 1-800-296-8464, Option 3.

Pre-Installation Setup and Considerations

Prior to performing either procedure outlined in this document, you must set the ID Card Definition for membership numbers. Setting the ID Card Definition only has to be done once.

Setting ID Card Definitions

Setting ID Card definitions allows VISTA to make all numbers the same length, thus permitting use of barcode readers to locate member records in Front Desk and Access Control scanners for Member Rapid Entry. For additional information on VISTA's barcode technologies, please contact your Account Services Manager.


To setup an ID Card Definition

1. From VISTA's **Main** menu, select **Setup > ID Card Types**.
2. Select the **VISTA Membership Card Number Definition**, enter your information in the following fields:

The screenshot shows a software window titled "Access Control Card Type Definitions" with a tree view on the left and a configuration panel on the right. The tree view includes categories like "Ticket Serial Number Definition", "Gift Certificate Number Definition", "TicketFast Number Definition", "Membership Card Number Definition", "Override Card Number Definition", "External Number Definition", and "RFID". Under "Membership Card Number Definition", "VISTA Membership Card Number Definition (7)" is selected. The configuration panel for this definition includes the following fields:

- ID Card Description:** VISTA Membership Card Number Definitor
- Total Length:** 7
- Identifying Token Definition:** Identifying Token: (empty field), Token Start: 0, Pad Character: 0
- Serial Number Definition:** Serial No. Start: 1, Serial No. Length: 7, Encode the Serial Number to avoid sequential num
- Sample ID Card Number:** (empty field), with a note: "Sample ID Card Number: (# symbols represent the serial number)"

Note: The **Sample Member Card Number** field must only contain number symbols as shown above. VISTA will display INVALID SERIAL NUMBER if this is not done.

3. Click  to **Save**, then close the **ID Card Type Definition** window.

Ongoing Best Practices for Importing CSV Files

Below are best practices to consider when using the DEx Utility to import CSV files.

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S
Member Number	Member Name	Member Valid From	Member Expires	Person Title	Person FName	Person MInitial	Person LName	Home Phone	Person Email	Person Gender	Address Line1	Address Line2	Address Line3	Address City	Address State	Address Zip	address Country	Category Name
449602	Ms Susan Miller	7/31/1983	1/1/2010	Ms.	Susan	B	Miller	(800) 555-1234	smiller@gmail.com	F	123 Main St	Apt J		Frankfort	IL	60423-9482	USA	Individual
449792	Mr Robert & Jackie Smith	6/30/1986	7/1/2009	Mr.	Robert	S	Smith	(800) 555-1212	bobsmith@att.net	M	5421 Second Ave	#1200		Brookfield	WI	53005-2825	USA	Family

Source File Preparation - When using an editor such as Microsoft Excel, one should always *remove all commas* from the data prior to converting to a CSV format. Commas in field data cause mapping controls to be lost. Most errors returned in the utility come from improperly formatted CSV files. Additionally, *always view your source in a text editor such as Word or Notepad, as Excel has a tendency to strip out leading characters.*

Header Records - It is easier to use the mapping tool if the file contains field names in the 1st row.

Sharing Errors - The CSV file *cannot be open* when running the import routine.

Backups - Always perform a valid *SQL backup* prior to running any import routine.

Lifetime Members - If the **MemberVisitor.Expires** field is not mapped or is empty, VISTA will take the **MemberVisitor.ValidFrom** field and add 50 years. This is due to the fact that VISTA doesn't support null (empty) expiration dates on records.

Memberships with Additional Cardholders Names

If your organization has family type levels where you capture the name of all persons on the membership, you may be able to import all names via your CSV file. The following rules must be adhered to:

- All persons **MUST** share the same Member Number.
- Records must appear sequential in the file.
- When VISTA finds 2 identical numbers, one after the other, it will automatically make the 1st record the Primary Member and any that follow as Additional Card Holders. You must ensure that your CSV file is in the proper order. You may import a relationship type as shown below, but it is not required.

A	B	C	D
Member Number	Last	First	Relationship
100235	Smith	Robert	
101756	Miller	Susan	
100456	Jones	William	
100456	Jones	Mary	Spouse
100456	Jones	Billy	Child
100279	Wood	Nancy	
100547	Adams	Paula	
100356	Greene	Richard	

Initial Production Usage

Ticketmaster recommends thorough testing of any routines in a non-production environment prior to deployment. Initially, you want to bring over all of your current members.

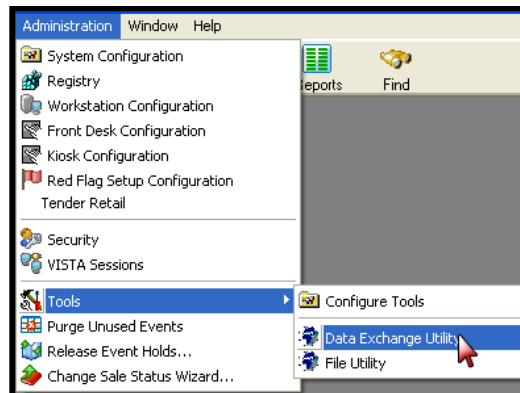


Since server environments vary, it is imperative that you *benchmark a file size* that runs completely. If your server runs out of memory prior to completion, the routine will stop and your import routine will fail. Additionally, some users choose to go backwards and import lapsed records for the past year or so. This allows users to access these former members for informational purposes.

Using the VISTA Data Exchange Utility

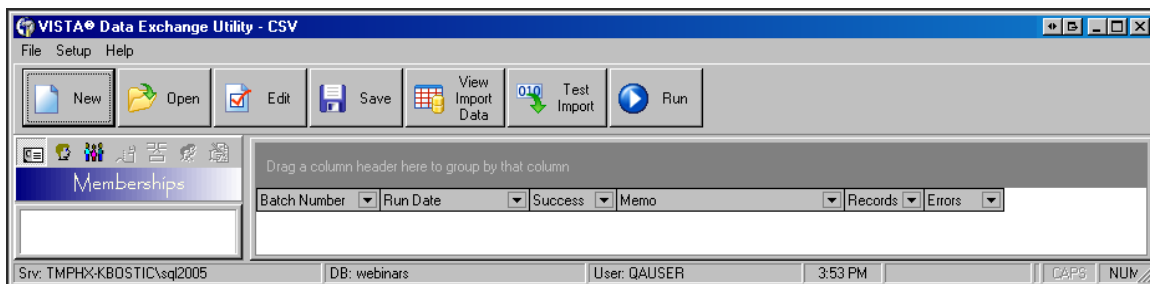
Open the VISTA Dex Utility

1. From VISTA's **Main** menu, select **Administration > Tools > Data Exchange Utility**.








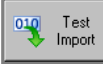

Note: If the menu is missing the shortcuts, contact the Help Desk. It may also be run directly from \vistaroot\dataexchange.exe.

2. After login, the **VISTA Data Exchange Utility** appears as shown.









Main Toolbar Functions

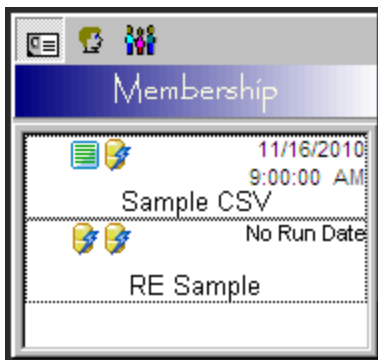
The table below describes the main toolbar functions in the utility.

Button	Description
	Begins a new build of either type of routines.
	Opens a previously saved routine (DPT file extension). This is helpful when transitioning from a test to production environment.
	Permits editing of a saved routine based on the directory selection.
	Saves the current routine manually. The DEx auto-saves whenever you switch tabbed views.
	Provides a table preview of the source data
	Performs a simulated test of how the source data would import, in relation to existing Person records.
	Begins the import process for the current routine.

Routines List Functions

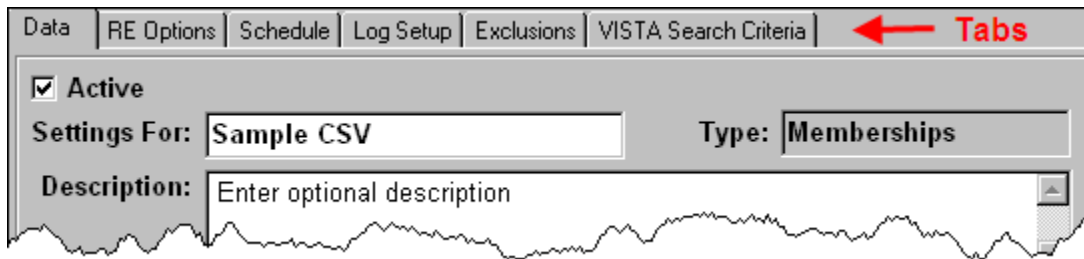
The left pane of the Data Exchange utility keeps track of all saved routines and lists information about each one.

Procedure	Description
	When selected, sets the DEx to Membership mode
	When selected, sets the DEx to Person (Individual) mode
	When selected, sets the DEx to Group mode
	Indicates the Source Destination types as a File
	Indicates the Source Destination types as a Database
Date/Time	Indicates routine is Scheduled and the Next Run Time
	Right-Clicking on a routine name will provide a context menu with shortcuts, history views, logs and properties



Creating a CSV Routine

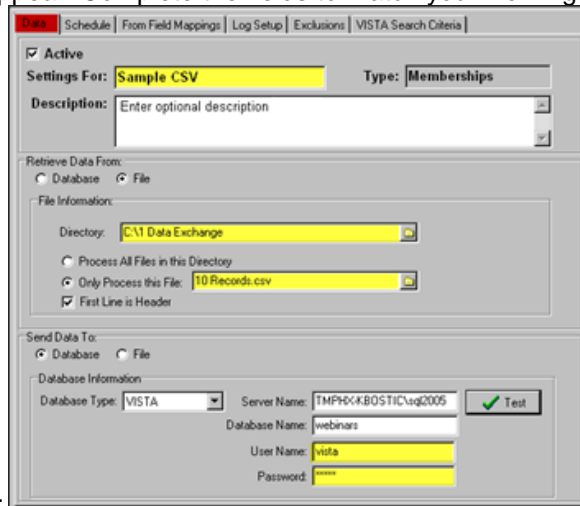
Complete the following procedures using the Data Exchange Utility to import a CSV file into VISTA. Be certain that your source file follows the [Best Practices](#) outlined previously.



Procedure Tab	Description
Data Source	Under the Data tab, you will select the CSV file to import and the destination login parameters.
Scheduling the Routine	Under the Schedule tab, you will enable and setup the conditions under which the routine will auto-run. <i>This is optional.</i>
Mapping Fields	Under the From Field Mappings tab, you will match the fields from the CSV file to fields within the VISTA database.
Setting Up a Log	Under the Log Setup tab, you can create a log file every time the routine is run. <i>This is optional.</i>
Adding Exclusions	Under the Exclusions tab, you can select MemberIDs to permanently exclude them for the import. <i>This is optional.</i>
Setting VISTA Search Criteria	Under the VISTA Search Criteria tab, you will specify what fields to match on existing VISTA Individual records when importing the external records. This prevents duplicate records.
View, Test & Run	From the main toolbar, you can verify that you are getting the expected results and run the routine to import your records.

Data Tab - Specify Source and Destination Locations

Click the **New** button and the following screen will appear. Complete the fields to match your working environment



based on the parameters defined below:

Parameter	Description
Settings For	Give the routine a Name
Description (Optional)	Enter a description for this routine
Retrieve Data From	Select File
Directory	Browse to the folder that contains the CSV file
Process All Files in this Directory	If you have the CSV files in smaller subsets, you can use this setting to process all the CSV files in the selected folder. This feature is helpful on the initial routine containing your complete set of member records.
Only Process this File	Browse and select one specific CSV file to import.
First Line is Header	Check this if the first record in the file contains the header information. Headers are the field labels and make the mapping steps much easier. Header records are ignored when importing
Send Data To	Select Database
Server & Database Name	These are auto-populated from your VISTA.ini settings
User Name & Password	Enter the ODBC SQL Server login name and password in the following field. This is not your VISTA User name. If unknown, contact your system administrator.
Test	Click this button to verify the ability to connect to the database. If you cannot connect, contact your SQL administrator

Schedule Tab

Routines can be scheduled to run based on an *interval, frequency and duration*. First, determine how you want to run the routine, and then select the appropriate procedure.

The screenshot shows the 'Schedule' tab in the VISTA interface. It includes a 'Schedule Enabled' checkbox, an 'Occurs' section with 'Daily' selected, a 'Daily frequency' section with 'Occurs every' set to 1 hour, and a 'Duration' section with start and end dates. Red brackets on the right side of the form label the 'Occurs' section as 'Interval', the 'Daily frequency' section as 'Frequency', and the 'Duration' section as 'Duration'. A 'Get Next Run Date' button and a 'Next Run' text box are also visible.

Schedule Enabled – Check this box to turn the automated scheduling feature on. Failure to do this will result in the service not running this routine.

- **Interval – Daily (shown above)**
Every XX day(s) - Select the frequency the routine will run per day
- **Interval – Weekly**

This screenshot shows the 'Weekly' scheduling options. The 'Occurs' section has 'Weekly' selected. The 'Daily frequency' section is set to 'Occurs every 1 week(s) on:'. Below this, checkboxes are provided for each day of the week: Mon (checked), Tue, Wed, Thu, Fri, Sat, and Sun.

Every XX week(s) - Select the frequency the routine will run

Day(s) of Week – Select which day(s) of the week the routine will run

▪ **Interval – Monthly**

The Monthly interval is a bit different, in that it allows you to specify 2 different statement parameters:

Select what day of the month plus a month interval. This equates to the statement of “The 15th of the month for every other month”.

Select what day-of-week interval plus a month interval. This equates to the statement of “The 1st Monday of every month”.

▪ **Daily Frequency Parameters**

Regardless of the occurrence intervals used, the daily frequency settings determine what time(s) the routine will run.

Occurs once at XX - Runs the routine once at the specified time. Enter a time for the routine to run.

Occurs Every XX - Runs the routine a number of times for a specified period of time starting at a specified time, daily. Enter amounts in the fields then select **minute(s)** or **hour(s)** and the required time. If

your venue creates many new records or makes updates in RE during business hours, you may wish to schedule routines to occur throughout the day, as shown here.

▪ **Duration**


Enter the **Start Date** and **End Date** you desire the routine to run. If no End Date is necessary, select **No end date**.


Start Date: 06/01/2009 **End Date:** 06/05/2009

▪ **Get Next Run Date**

Pressing this button returns the date on which the routine will auto-start based on all the above settings.

Note: This does not take into account the interval upon which the DEx Scheduler Service runs, therefore the date and time may be misleading.

 **Data Validation** – Prior to enabling any scheduled routines, it is highly recommended that you perform several runs in a test environment and that you follow the [validation guidelines](#).

 **Scheduler Service** – VISTA’s DEx Scheduler Service must be installed on the server by an administrator and running for any scheduled routines to work. Please see **Appendix B** for [Installing the DEx Scheduler Service](#).

Field Mapping

The fields from the CSV file must be mapped to their corresponding fields within the VISTA database. You must specify the Key CSV Field and Address Type the 1st time that you build the routine.

Source	Destination
Number	MemberVisitor.Number
Name	MemberVisitor.Name
Fname	Person.FName
Lname	Person.LName
Line1	Address.Line1
Line2	Address.Line2
City	Address.City
State	Address.State
Zip	Address.Zip
Phone	Common.Phone
Email	Common.Email
Type	Member.MembershipTypeDe
CategoryDesc	Member.MembershipCategori





Number	Name	Fname	Lname	Line1	Line2	City	State	Zip	Phone	Email	Type
100900	Rick & Sarah	Richard							873-12		Annual
10	Niel & Alice	Niel							651-42		Annual
100004	Elizabeth Sm	Elizabeth							735-29		Annual
5235	Mike & Nanc	Michael							561-377		Annual
1048	Tom Sulican	Thomas							331-60		Annual

The following table provides field descriptions on the **From Field Mappings** tab shown above:

Field	Description
Key CSV Field	Tells VISTA what field is unique to each record in the CSV file. If empty, you must set it. The member number is usually the identifier.
Address Type	Select which VISTA current Address Type to update with the CSV data. <i>Mailing is the hidden default</i>
Source	Lists fields from the source CSV file. If there are no headers, then it will say Field1, Field2, and so on.
Destination	The VISTA database fields into which you are sending your data. Not all fields must be mapped. Un-mapped fields are simply ignored.
Available Fields	Destination fields list for you to associate with your source fields. Required fields are in RED
Only Show	Controls how many records display in the Preview Panel .
Preview Pane	Displays a preview of your CSV data

Mapping Toolbar

The following table shows helpful features on the Main Toolbar when on the Mapping tab.

Feature	Description
 Load File	Refreshes the CSV file in the Preview Pane .
 Load FMU File	Brings in a previously stored set of field-mappings. Useful if you've previously used the Import.exe.
 Save FMU File	Saves the current mapping to an external FMU file. Useful if working in a test environment and then moving into production.
 Clear Mapping	Clears the current mapping then re-initiates the Auto-map feature.

- **Mapping fields**

1. Select a **Source** field to map to
2. From the **Available Fields** list, drag-and-drop or double-click the field to map in the **Destination** field.

For a list of available fields and descriptions, see **Appendix B** [Available Fields for CSV Mapping](#).

3. Repeat Step 2 to map all desired fields.
4. Click the **Save** button on the Main Toolbar.

- **Clear a mapped field**

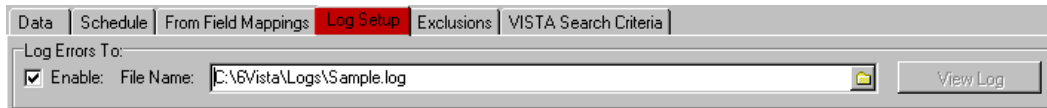
1. To change mapping of a field, right-click on the **Source** field you want to clear.
2. Select **Clear Dest Field** from the pop-up menu. Then information in that field is deleted.

- **Clear all mapped fields and auto-map**

1. Select the Clear Mapping button from the main toolbar and say Yes.
2. To have the DEx auto-map all fields for you, say Yes to the auto-map prompt. The DEx will attempt to match based on the text in each field label. Any fields that are missed can then be manually mapped.

Setting up a Log File

The Data Exchange Utility allows you the option of creating a log each time the routine runs.

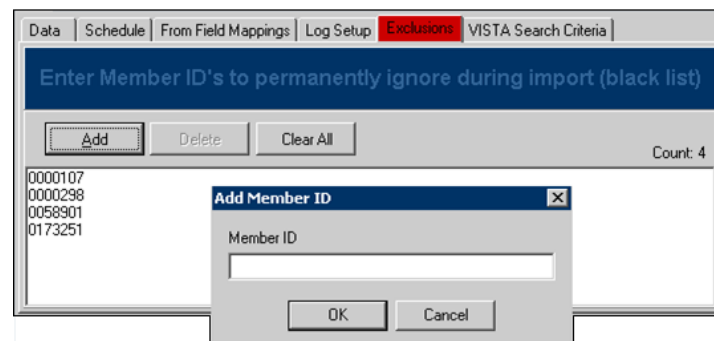


Schedule Enabled – Check this box to turn on routine logging.

File Name – Browse to the folder in which you want the log file created and specify a name in the Save As dialogue.

Adding Exclusions

Under the **Exclusions** tab you can block any records that you want to permanently exclude from the import using the MemberID. Examples would be high-profile members such as celebrities, board members, and management.



- **To add a Member ID for exclusion**
 1. Click the **Add** button. The **Add Member ID** window appears.
 2. In the **Member ID** field, enter the **Member ID** to exclude.
 3. Click **OK**.
- **To delete a Member ID from exclusion**
 1. Select the **Member ID** of the record to no longer exclude.
 2. Click the **Delete** button.
- **To clear all Member IDs from exclusion**
 1. Click the **Clear All** button.
 2. Click **Yes** to confirm then save on main toolbar.

Setting VISTA Search Criteria

Under the **Search Criteria** tab you specify what fields to match on *existing* VISTA Person records when importing the external records. If a match is found, the existing record will be appended with the member data in the file. If not a match, then all data will be imported. The default settings are depicted in the image below.

The table below describes the functions of the relevant sections.

Section	Description
Pad Member Number	Makes all numbers match the ID Card Setup length specified in the setup. Required for all barcode scanning.
Criteria Selection	Determines which fields of <i>existing Individual records</i> (if any) to attempt a match. Also allows user to specify the number of characters before a match is ruled.
Criteria Actions	Determines how to handle records containing codes that do not already exist in VISTA. Some examples would be a new member type or campaign in the CSV file and you want it automatically added to the member category definitions in VISTA.
Record Update Actions	Determines how to update previously imported records in VISTA.

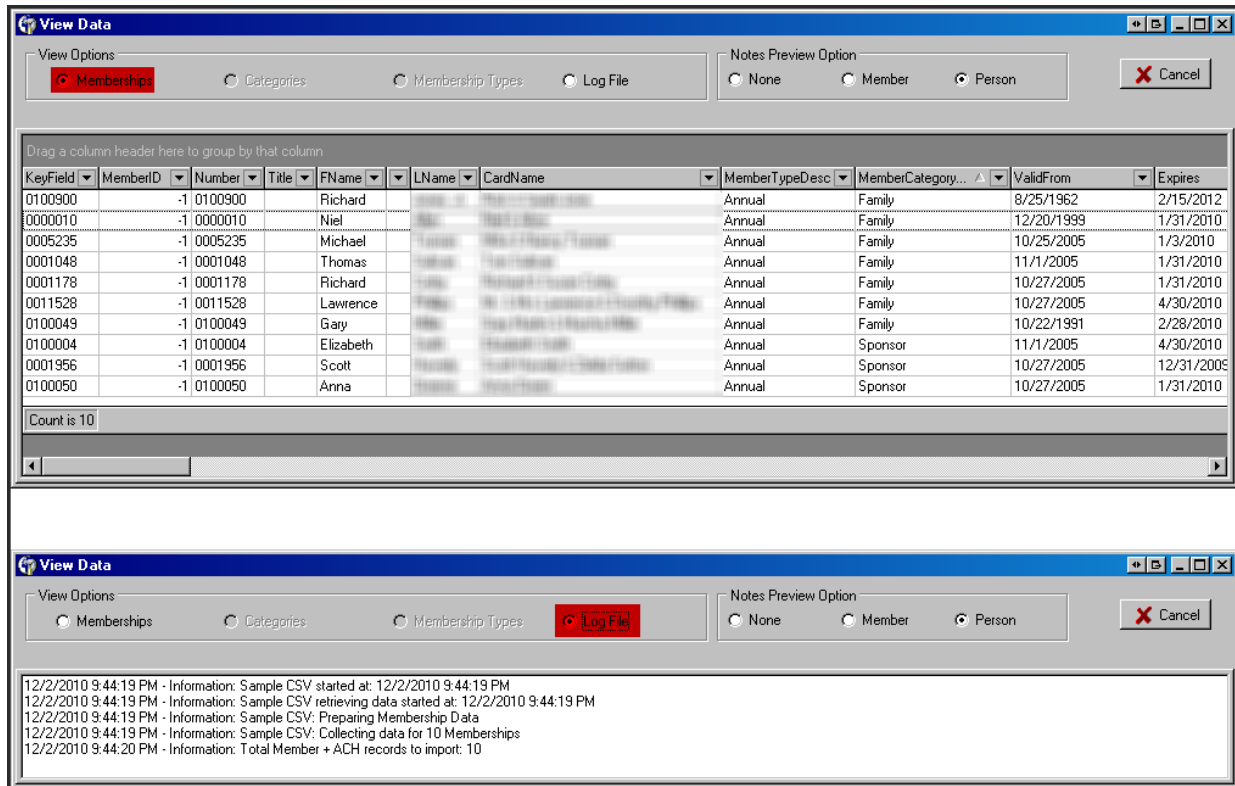


Prior to performing an import, you may wish to run VISTA's new **Validate Person Data Utility** to locate and cleanup any duplicate Person records that may exist in your data. For more information, go to <http://tmvista.com/Support.asp> .

View Import Data

The View Import feature allows you to validate your source data, by seeing what it will look like prior to importing it. The View feature is only looking at your source data. It is not looking at an existing Person data in your VISTA database. For large files, the collecting process may be time consuming. However, you may abort at any time and view what has been collected at that point.

There are 2 view options as shown below:



View Options	Description
Membership	Shows a per record preview with each field that was mapped to your source file
Log File	Shows a brief record count
Notes Preview Option	Description
None	Not used with View Data, Only Test Data
Member	
Person	

Test Import Data

The test import feature simulates the complete routine, including assessing how your existing Person data matches your source data, based on the Find By Criteria from the routines Search Criteria tab. To help you understand what the output is telling you, we have provided 2 scenarios and will use the log files to explain it. Matchup the corresponding reference numbers to follow the explanation below.

- 1 The DEx found an existing Person record matching Member 0000010 and will perform the following:
 - Attach the existing Person to a new MemberVisitor record
 - Create or overwrite the existing Address record for the Person

KeyField	MemberID	Number	Title	FName	LName	Suffix	GroupName	CardName
0000010	-1	0000010		Niel				
TEST MODE Active: Address record would get created TEST MODE Active: MemberVisitor record would get created.								
0001048	-1	0001048		Thomas				
TEST MODE Active: Person record would get created using 99 as Person ID TEST MODE Active: Address record would get created TEST MODE Active: MemberVisitor record would get created.								
0001178	-1	0001178		Richard				
TEST MODE Active: Person record would get created using 99 as Person ID TEST MODE Active: Address record would get created TEST MODE Active: MemberVisitor record would get created.								

```

12/2/2010 10:27:47 PM - Information: Sample CSV TEST MODE IS ACTIVE
12/2/2010 10:27:47 PM - Information: Sample CSV started at: 12/2/2010 10:27:47 PM
12/2/2010 10:27:47 PM - Information: Sample CSV retrieving data started at: 12/2/2010 10:27:47 PM
12/2/2010 10:27:47 PM - Information: Sample CSV: Preparing Membership Data
12/2/2010 10:27:47 PM - Information: Sample CSV: Collecting data for 10 Memberships
12/2/2010 10:27:49 PM - Information: Total Member + ACH records to import: 10

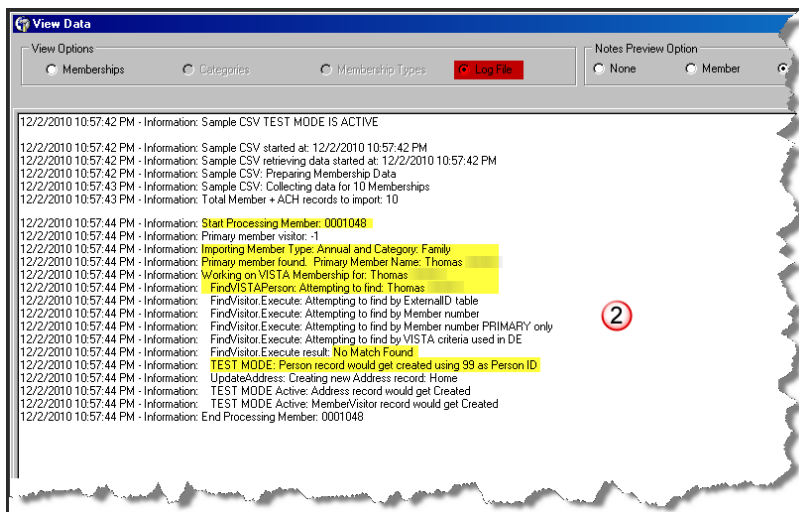
12/2/2010 10:27:49 PM - Information: Sample CSV processing data started at: 12/2/2010 10:27:49 PM
12/2/2010 10:27:49 PM - Information: Sample CSV: Preparing Membership Data
12/2/2010 10:27:49 PM - Information: UPDATING existing VISTA Membership (MemberID 745546)

12/2/2010 10:27:49 PM - Information: Start Processing Member: 0000010
12/2/2010 10:27:49 PM - Information: Primary member visitor: -1
12/2/2010 10:27:49 PM - Information: Importing Member Type: Annual and Category: Family
12/2/2010 10:27:49 PM - Information: Primary member found: Primary Member Name: Niel
12/2/2010 10:27:49 PM - Information: Working on VISTA Membership for: Niel
12/2/2010 10:27:49 PM - Information: FindVISTAPerson: Attempting to find: Niel
12/2/2010 10:27:49 PM - Information: FindVisitor.Execute: Attempting to find by ExternalID table
12/2/2010 10:27:49 PM - Information: FindVisitor.Execute: Attempting to find by Member number
12/2/2010 10:27:49 PM - Information: FindVisitor.Execute: Attempting to find by Member number PRIMARY only
12/2/2010 10:27:49 PM - Information: FindVisitor.Execute result: Match Found (VISTAID: 745529)
12/2/2010 10:27:49 PM - Information: UpdateAddress: Updating Address: Home
12/2/2010 10:27:49 PM - Information: TEST MODE Active: Address record would get Updated
12/2/2010 10:27:49 PM - Information: TEST MODE Active: MemberVisitor record would get Updated
12/2/2010 10:27:49 PM - Information: End Processing Member: 0000010
12/2/2010 10:27:49 PM - Information: TImportVISTAMemberships.Execute imported count: 1
12/2/2010 10:27:49 PM - Information: UPDATING existing VISTA Membership (MemberID 745553)

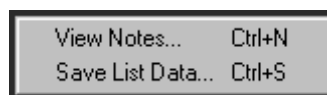
12/2/2010 10:27:49 PM - Information: Start Processing Member: 0001048
12/2/2010 10:27:49 PM - Information: Primary member visitor: -1
    
```

- ② The DEx could not find an existing Person record matching Member 0001048 and will perform the following:
- Create a new Person record from the source data
 - Attach the Person to a new MemberVisitor record
 - Create a new Address record for the Person

Note the line in both views for #0001048. The statement “Person record would get created using 99 as the Person ID”. This simply says that for the purpose of the test view, it is using a false ID number of 99 in the display.

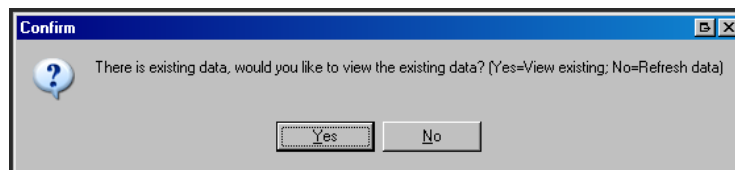


Note: As with all list views in the VISTA system, you can right-click to save the data in a text based file.



Re-Viewing or Re-Testing

If you have previously performed a View or Test on a routine, the following Confirm prompt may appear.



Views are stored within the routine and you are being asked if you want to re-use the previous (existing) one or have a new (refreshed) view created. For large files, the refresh may be time consuming. However, you may abort at any time and view what has been collected at that point.

Validating your data

You *must* validate your data for accuracy.

While every attempt is made to prevent data compatibility issues, you are working with simple text based CSV data. It is important that you validate that your data imports properly. The View and Test features have been created to assist you with making certain your data is going where you want it to. Once you have thoroughly tested and validated your routine(s), proceed with running the routine.

- Incorrect field mapping – wrong data in the wrong field
- Data truncation – data in a field was cutoff
- Date Formatting – Dates view incorrectly
- Phone Numbers – Area code format issues
- Field Skips – Are there commas within a field?

Re-check your data against the [Best Practices for CSV Files](#) mentioned earlier and the list of fields and formats outlined in **Appendix B** [Available Fields for CSV Mapping](#).

Backup your data!



Prior to running any routine against a production database, perform a valid SQL backup. There is **no roll-back or Undo capability** built into the DEx utility. If you run a routine that encounters problems, you would need to perform a database restore to return your data to its previous state.

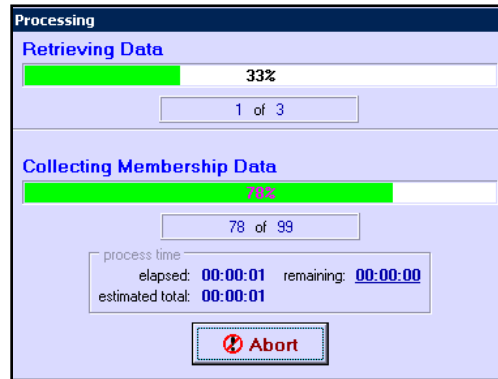
Running the Routine

After setting up the parameters, run the routine.

Click the **Run** button.

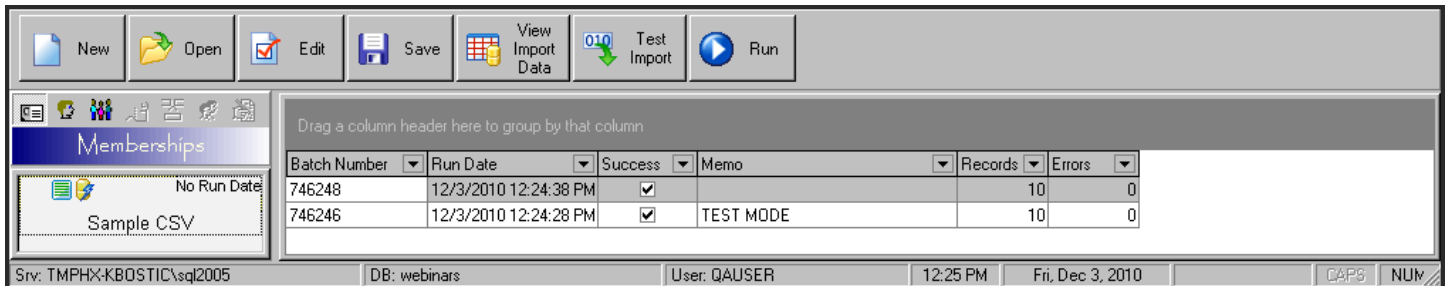


The DEx interface will disappear and the **Processing** screen will appear. The elapsed and estimated time remaining for each step in the conversion process until the routine is complete and the DEx interface is once again displayed. This time is an estimate only. The record count is actual, as it is obtained prior to any processes starting.



Batch History

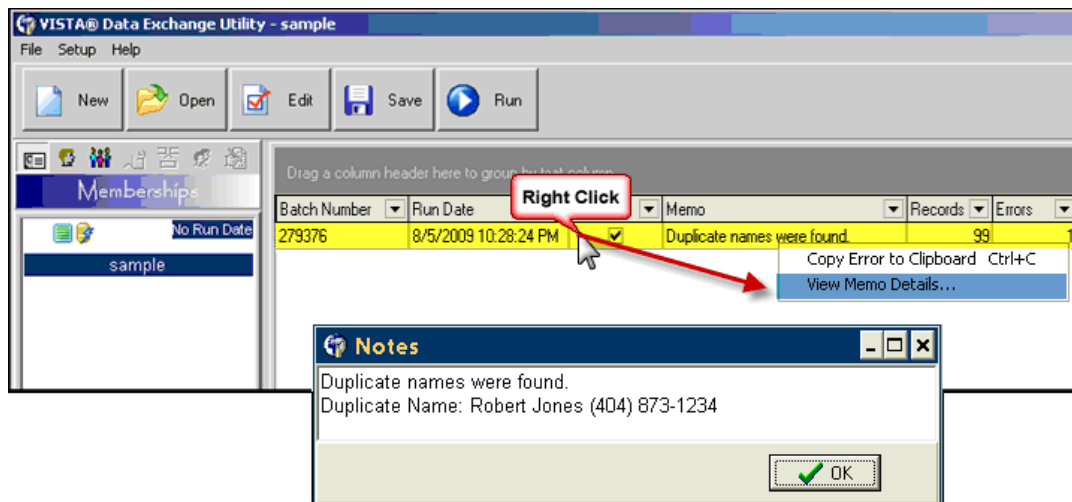
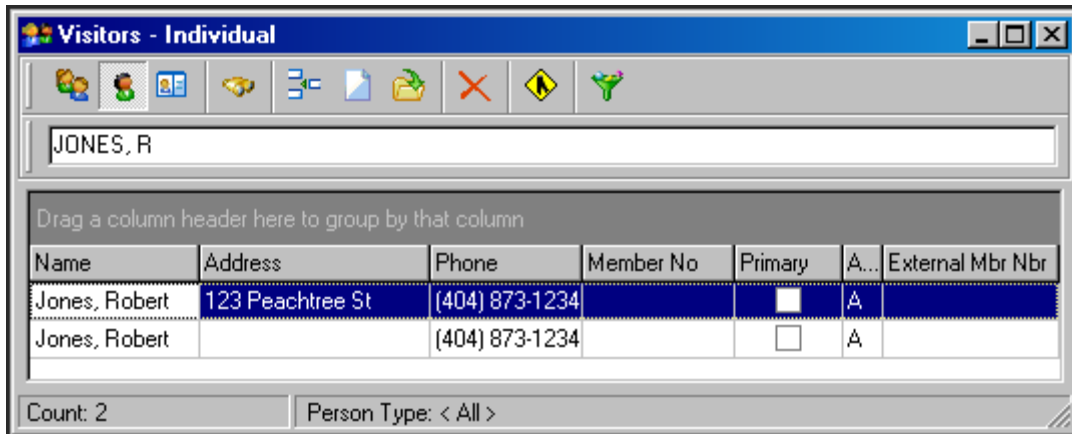
Batch summary information is displayed, indicating a successful run, a brief memo if any errors are found, and the number of records imported with any errors found.



Note: Record number counts are based on number of Primary Members processed. If your file has ACH records, the count will not include them.

Duplicate Record Exceptions

If the VISTA database has duplicate records, an exception occurs when the CSV file has a matching member record. An error is shown in the batch summary and the record is *ignored*. A record match is determined by the settings on the **VISTA Search Criteria** tab.



Based on the default settings of FName, LName, Home Phone, the records above would be read as duplicates and would generate an exception memo as shown. You could then manually cleanup the data, or use VISTA's new **Validate Person Data Utility** to locate and cleanup any duplicate Person records that may exist in your data. For more information, go to <http://tmvista.com/Support.asp>

Viewing Records from the VISTA Application

Member records are accessible on an Individual's visitor record. Additional information such as primary members with additional account holders and members with multiple memberships can also be viewed.

Primary Members

All memberships are based on a primary member, where 1 member record is associated with 1 person record.

Primary with additional Cardholder Users

Under certain conditions, other persons can be linked to a primary member's membership. These are referred in VISTA as Additional Cardholders (ACH). For CSV based imports, all ACH members **must** use the same member ID as the primary. Only RE SQL routines permit unique IDs per person.

Visitors - Member View

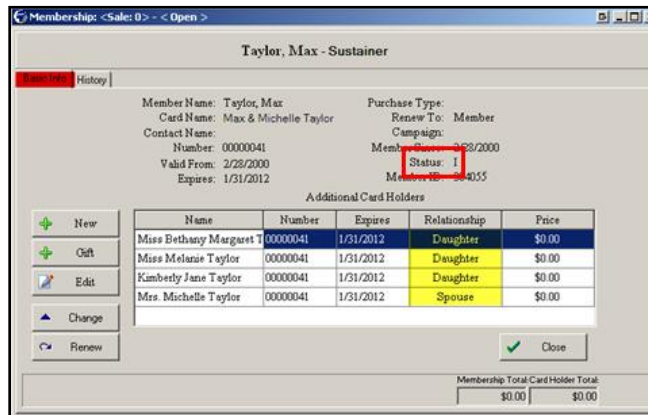
Because all ACH records share the same Member Number, opening any related members from the *member list* view will go directly to the Primary Member account. However, when using the Visitors – Individual view, each person is shown as unique person records and can be edited as such.

Visitor Name	Member No	Expires	Membership Category	Address	Visitor Kind	Primary
Taylor, Bethany	00000041	1/31/2012	Sustainer	89901 Treybrook		<input type="checkbox"/>
Taylor, Kimberly	00000041	1/31/2012	Sustainer	3327 Dawson Str		<input type="checkbox"/>
Taylor, Max	00000041	1/31/2012	Sustainer	3327 Dawson Str		<input checked="" type="checkbox"/>
Taylor, Melanie	00000041	1/31/2012	Sustainer	41633 Hanover L		<input type="checkbox"/>
Taylor, Michelle	00000041	1/31/2012	Sustainer	3327 Dawson Str		<input type="checkbox"/>

Count: 5 Member Type: < All >

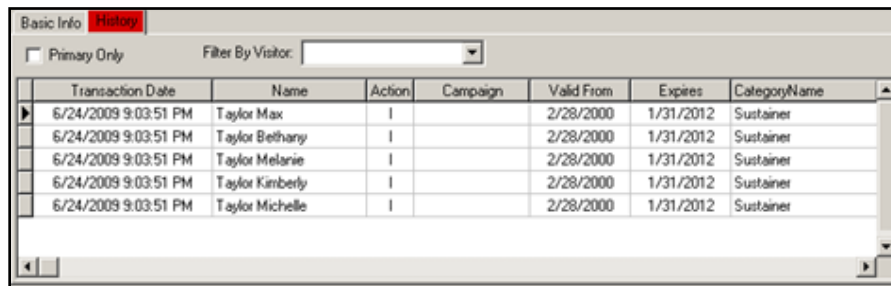
Basic Information Tab

The primary membership is displayed upon the record. The header contains all information about the membership. The Additional Cardholders view appears with their relationship types, if imported with the records. The **Status = I** indicates that the record came from an import routine.



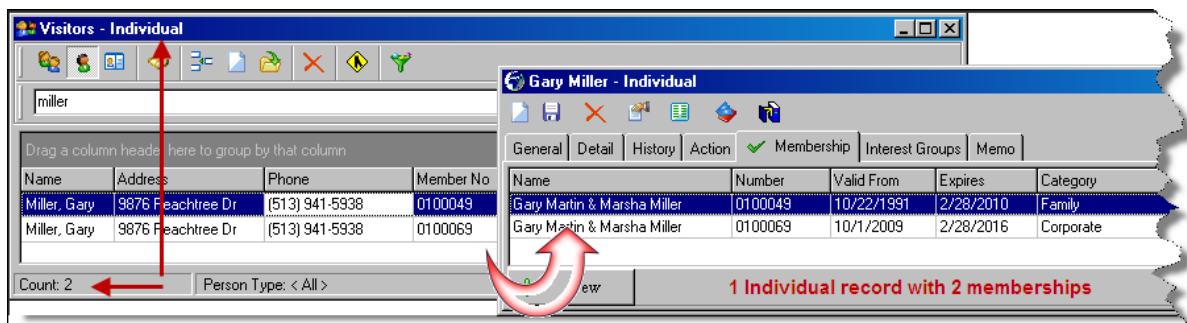
History Tab

Anytime data relating to this membership is imported, VISTA writes a log of that activity.



Individuals with Multiple Memberships

When an individual has more than 1 membership, they will appear as a duplicate in list windows. In actuality, both records are the same Individual but they *must list separately* anywhere that the Member Number or Primary check-box appear.



Appendix A - Available Fields for CSV Mapping

The table lists the available fields for CSV file mapping. Required fields are **Bolded**.

Name	Date Type	Length	Format
Address.TypDesc	varchar	40	
Address.Line1	varchar	40	
Address.Line2	varchar	40	
Address.Line3	varchar	40	
Address.City	varchar	40	
Address.State	varchar	20	
Address.Zip	varchar	10	##### or #####-####
Address.Country	varchar	20	
Common.Email	varchar	60	
Common.Phone	varchar	20	(###) ###-####
Common.Fax	varchar	20	(###) ###-####
Common.MobilePhone	varchar	20	(###) ###-####
Common.lastVisit	varchar	8	As Windows Regional
Common.AccountNo	varchar	15	
Common.AllowDirectMarketing	char	1	
Common.DeprDesc	varchar	40	
Common.Taxable	bit	1	
Common.SourceDesc	varchar	40	
Common.RegionDesc	varchar	40	
Common.TypeDesc	varchar	40	
Grp.Name	varchar	50	
Grp.Website	varchar	80	
Gr.Schol DistDesc	varchar	40	
Grp.Grades	varchar	30	

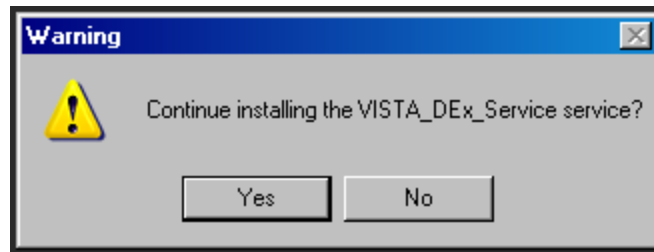
Member.MembershipTypeDesc	varchar	40	
Member.MembershipCategoryDesc	string	80	
Member.VisitorNumber	varchar	10	
MemberVisitor.VisitorKind	varchar	1	
MemberVisitor.Name	varchar	65	
MemberVisitor.ValidFrom	date/time	8	as Windows Regional
MemberVisitor.Expires	date/time	8	as Windows Regional
MemberVisitor.NumCards	integer	4	
MemberVisitor.Printed	date/time	8	
Person.Title	varchar	10	
Person.FName	varchar	20	
Person.Minitial	varchar	1	
Person.Lname	varchar	25	
Person.Suffix	varchar	10	
Person.WorkPhone	varchar	20	
Person.DOB	date/time	8	as Windows Regional
Person.Gender	varchar	1	
Person.CanAcceptHTML	varchar	1	
PersonNationality	varchar	20	
Person.SSN	varchar	20	

Appendix B - Installing the DEx Scheduler Service

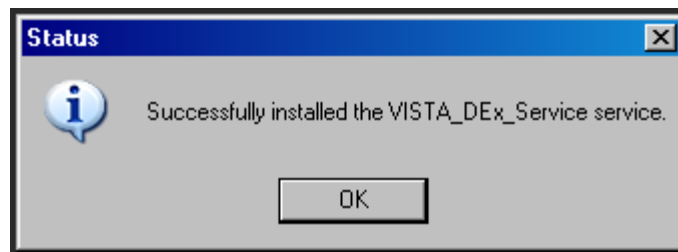
VISTA's Data Exchange (DEx) Utility has the ability to be automated based on stored routines being run via a Windows service. The DEx service must be installed with admin rights on the VISTA server, following the parameters defined in this document.

Service Installation

1. Run, as administrator, the \\vistaroot\dataexchange\VISTA_DEx_Service.exe



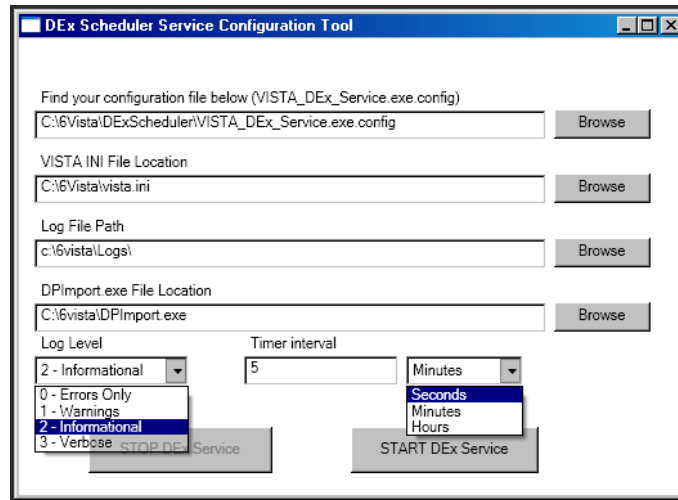
2. Choose YES to install the service



3. Choose OK

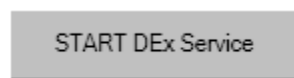
Configure the Service

1. Run, as administrator, the \\vistaroot\dataexchange\config\DExConfigEditor.exe
2. Complete all parameters to match your install of VISTA and your preferences.



Parameter	Description
INI File Location	The location of the vista.ini file that contains the database connection information.
Log File Path	The file path where the DEx Scheduler log will be stored
Log Level	The level of details written to the log file: Errors Only, Warnings, Informational or Verbose
Timer Interval	The interval that determines how often the service will start looking for enabled scheduled routines
Stop/Start	Use to stop and then restart the service, after making configuration changes.

3. Click



The DEx Scheduler Service is now running.



IMPORTANT NOTE: If any of these values are changed when the service is running, the changes will not be reflected until the service is stopped and restarted.