

This session will show you the step-by-step processes needed to setup a VISTA database to sell and manage Membership records. Methods for both the Back Office and Front Desk modules will be shown.

Minimum Requirements	Description
VISTA Version	Version 6.0 or later
Security Access	You will need to be able to assign your user groups specific rights, as shown in this session.
VISTA Membership	Your VISTA software must have the Membership module enabled.

I. Configure the Membership Parameters

1. Set VISTA ID Card Definition
2. Set Membership Rules in System Configuration

II. Configure Membership Levels

1. Define Type and Categories
2. Define Renewal and Upgrade migration points
3. Set Prices
4. Configure Front Desk

III. Module Usage

1. Selling a Membership
 - Individual Only
 - With Additional Cardholders
 - Card Printing
2. Managing Records
 - Renewals
 - Upgrades
 - Adding Additional Cardholders
3. Basic Reporting