



Membership Configuration

October 20, 2010

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VISTA Membership Configuration

Overview

The latest VISTA product releases include structural changes within the Membership Module, requiring clients to make changes to their existing configurations. These changes relate to upgrade membership kinds, and will provide users with the ability to easily upgrade existing memberships. The focus of this document is to guide the user through the process of properly reconfiguring their existing upgrade membership kinds, and provide them with suggestions for managing additional card holders (ACH). Prior versions of VISTA handled membership upgrades by identifying the “Type” of membership you were upgrading TO. The new, version will identify what “Type” of membership you are upgrading FROM.

The screenshot shows the 'Edit Category - Membership' form with the following fields: Name (Upgrade Family -> Family Max), Code, Group Code, Membership Type (Family), Transaction Kind (Upgrade), and Upgrade To (Family Max). The 'Upgrade To' dropdown is circled in red.


Prior Versions

The screenshot shows the 'Edit Category - Membership' form with the following fields: Name (Upgrade Family -> Family Max), Code, Group Code, Membership Type (Family), Transaction Kind (Upgrade), and Upgrade From Type. The 'Upgrade From Type' dropdown is circled in red.

New Versions

Technical Requirements

- Membership changes are relevant only for those clients upgrading from releases prior to VISTA versions 5.0.4.42, or 6.0.1.18.
- Requires clients to run the current Membership Update.exe (see Membership Update instructions).
- The user will need VISTA administrator rights, or rights that allow them to Access, Create, and Modify records in price module.

 **Documentation Note:** The images contained in this document may have been altered for the purpose of saving space. The forms appearing in your VISTA application may appear larger than those shown here.

Instructions for updating your data:

1. Open the Pricing module

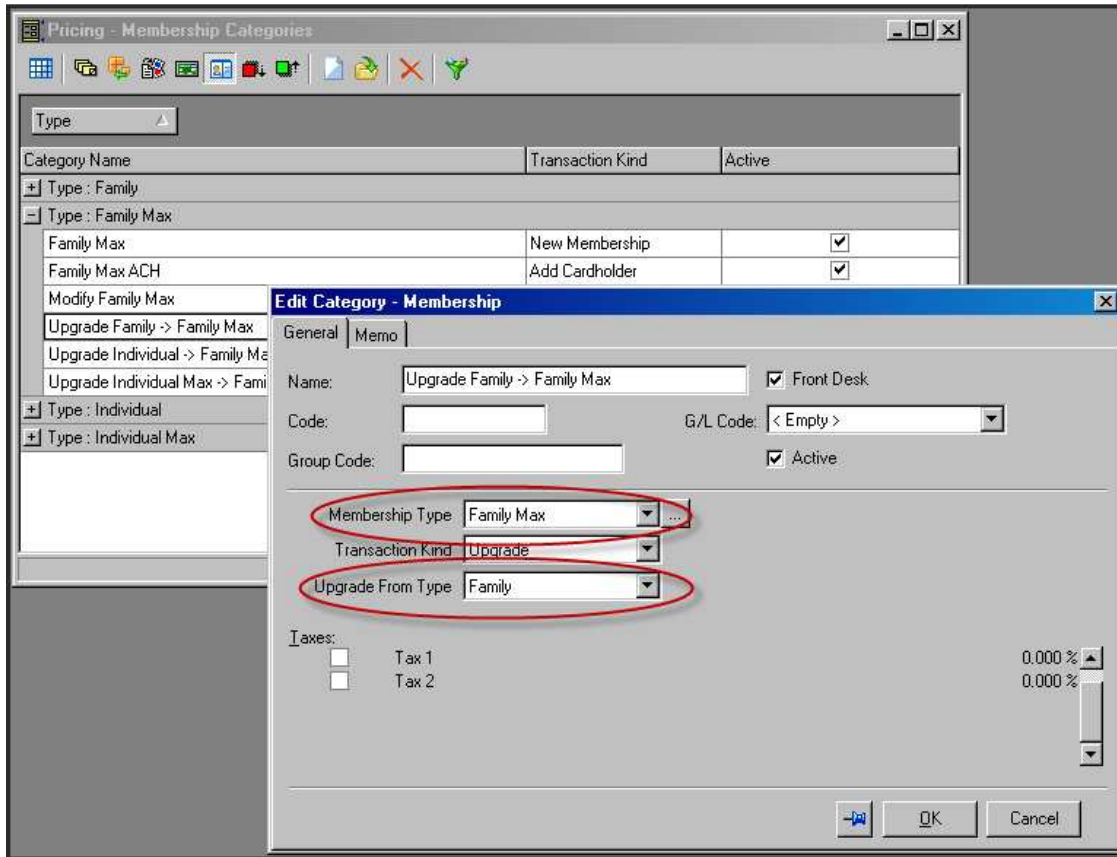


2. From the window toolbar, select the Membership Categories button to display the list of previously defined categories.

A screenshot of the 'Pricing - Membership Categories' window. The window title bar reads 'Pricing - Membership Categories'. Below the title bar is a toolbar with several icons. A red circle with the number '1' is around the 'Membership Categories' icon in the toolbar. Below the toolbar is a table with the following data:

Category Name	Type	Transaction Kind	Active
Family	Family	New Membership	<input checked="" type="checkbox"/>
Family ACH	Family	Add Cardholder	<input checked="" type="checkbox"/>
Family Max	Family Max	New Membership	<input checked="" type="checkbox"/>
Family Max ACH	Family Max	Add Cardholder	<input checked="" type="checkbox"/>
Individual	Individual	New Membership	<input checked="" type="checkbox"/>
Individual Max	Individual Max	New Membership	<input checked="" type="checkbox"/>
Modify Family	Family	Upgrade	<input checked="" type="checkbox"/>
Modify Family Max	Family Max	Upgrade	<input checked="" type="checkbox"/>
Upgrade Family -> Family Max	Family Max	Upgrade	<input checked="" type="checkbox"/>
Upgrade Individual -> Family	Family	Upgrade	<input checked="" type="checkbox"/>
Upgrade Individual -> Family Max	Family Max	Upgrade	<input checked="" type="checkbox"/>
Upgrade Individual -> Individual Max	Individual Max	Upgrade	<input checked="" type="checkbox"/>
Upgrade Individual Max -> Family	Family	Upgrade	<input checked="" type="checkbox"/>
Upgrade Individual Max -> Family Max	Family Max	Upgrade	<input checked="" type="checkbox"/>

- Open the Membership Type that you wish to edit and assign the appropriate type to the Upgrade From Type field.



- Click 

- Repeat the assignments for ALL upgrade kinds.

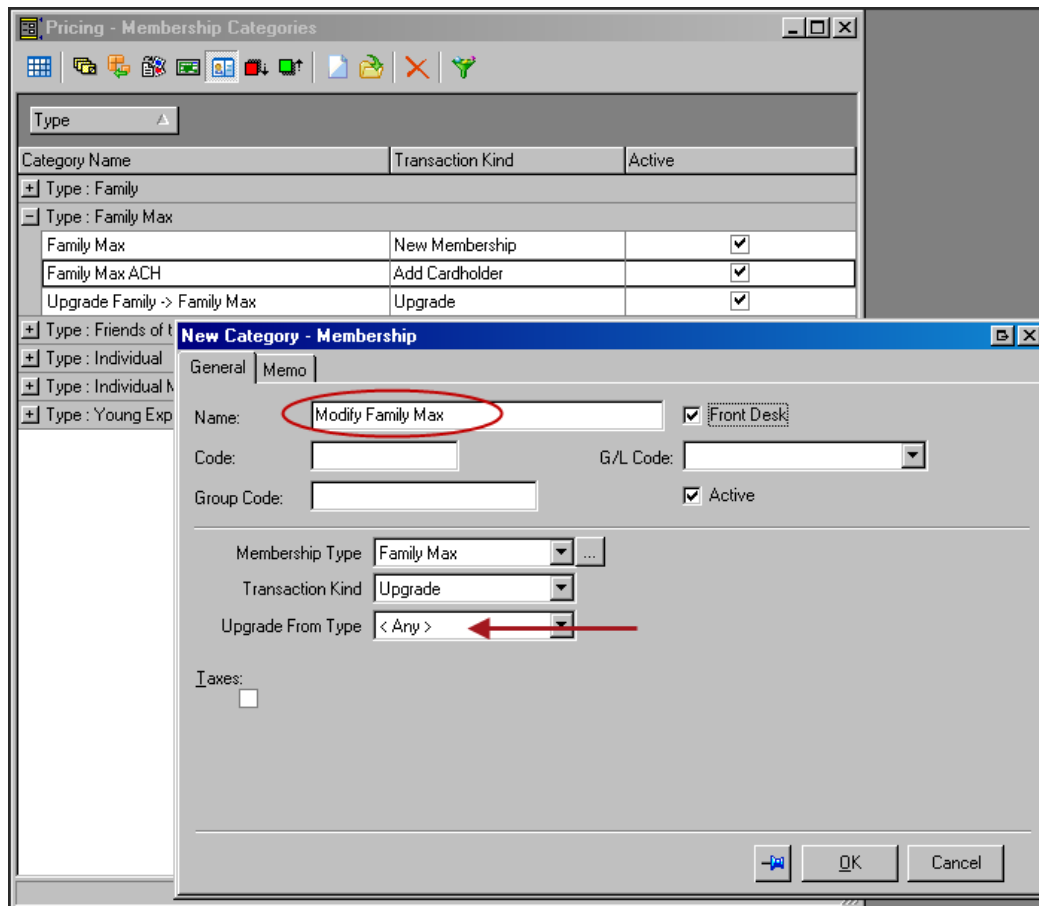
Modification of Additional Cardholders

In order to make changes to existing members, an upgrade kind called *Modify-typename* should be created for each upgrade kind that you have. This is required in order for you to perform the Add Additional Cardholder function to an existing membership. Additionally, you must create a \$0 price point for each in order to “sell” it.

Here is an example of a possible Membership Type, which you could use to modify existing memberships and the steps you need to perform for each:

- Add new modification types

2. Set Upgrade From to <ANY>

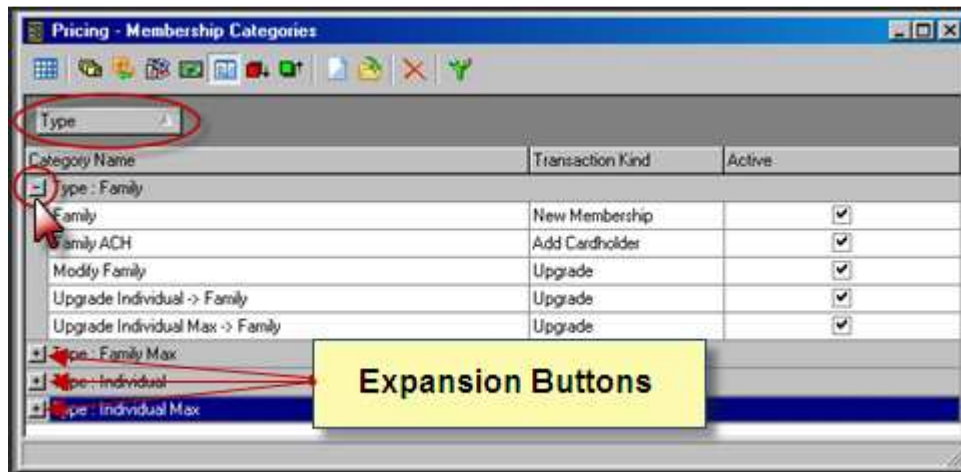


Note: It is important that you use an Upgrade From Type of <Any>. This will make the Category available from any Membership Type.

3. Open your current price list
4. Add \$0 entries for each type that you created



Best Practice Note: When working with list windows, it is helpful to group on a column by dragging the column header into the gray area above the listings. In this example below, grouping by Type is useful. Each grouping can then be expanded by clicking the **+** to the left of each grouping header.



For additional resources, please visit the [Ticketmaster VISTA Website](#)

For Product Support, please call 1-800-296-8464 (option 2)