# How to...

# Sell a gift certificate

- 1. Enter a patron into the account
- 2. Enter a "source"
- 3. Choose a Delivery Method
- 4. Ask patron if they want a message (use notes for one line messages, use CSI for up to 3 lines)
- 5. Click the MoneyBags
- 6. Use "TP Visa/Amex/Etc" payment method
- 7. Enter the desired amount in the Amount box (eg \$100)
- 8. Authorize the credit card.
- 9. Click "Insert" (you should see a blank payment box with a negative value (eg, \$100.00)
- 10. Use "TP Gift Certificate" payment method
- 11. Check to be sure that "total payments" = \$0.00
- 12. Read the patron the GC number WITH DASHES
- 13. Click "Done" on order
- 14. To get order #, click "Orders -> Load Last Order"

# Check the value of a gift certificate

If you can find the original GC purchase order...

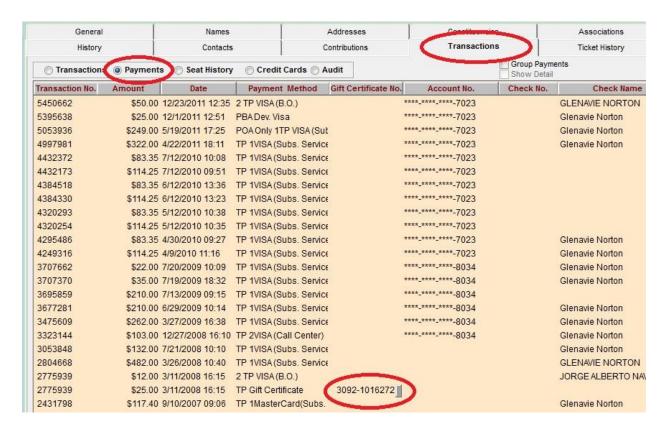
- 1. Go to the "order history" tab
- 2. Scroll to the right, click on the chicklet next to the GC number

If you only have the GC number...

1. In the constituent search screen, do an "advanced" search for "Gift Certificate No." equal to (enter GC number)



- 2. The search will show a list of every patron who has had a transaction with that GC number, including the original purchase order as well as every purchase made *with* that GC.
- 3. Double-click on any of the patron listings to open their account details.
- 4. Go to the "Transactions" tab.
- 5. Select the "Payment" radio button.
- 6. You will see a list of every payment that patron has ever completed. This INCLUDES payments to and from a gift certificate.
- 7. Look for your GC# in the "Gift Certificate No." column which is blank for payments that did not involve a GC. *See screenshot, below.*



### Enter a CSI – for gift certificate and reprint/change-name requests

- 1. In the "consituents" screen, navigate to the "Connections" tab
- 2. Make sure the "Customer Service" radio button is selected
- 3. Click "add" in the lower left corner
- 4. Choose "inbound phone" for contact method
- 5. Use the following categories...
  - a. For gift certificates, use "TP Gift Certificate"
  - b. For reprint requests, use "Ticketing Issue"
  - c. For other issues, check with a lead
- 6. Use the following categories...
  - a. For GCs, use "TP Gift Certificate"
  - b. For Reprint/Change name use "Ticketing Issue"
- 7. Use the following activity types...
  - a. For GCs, use "TP Gift Cert message"
  - b. For SINGLE TIX reprints, use "Reprint & Hold" or "Reprint & Mail" or "Change name on tix"
- 8. For reprint/change-name requests, be sure to choose the proper season and package
- 9. For reprint/change-name requests, be sure to put the **order** # in the **notes** field
- 10. Enter any possibly relevant information into the **notes** field
- 11. Save and close.

# Add a patron to the eClub

- 1. In the "constituents" screen, click the "Attributes" tab
- 2. Select the "Interests" radio button
- 3. Click a check box for each relevant interest these interests control what emails a patron gets

4. Save your changes and close.

#### Send email/tix to an alternate address

- 1. In the "constituents" screen, navigate to the "Addresses" tab
- 1b. (for email, select the "electronic" radio button)
- 2. If the desired address is already present, skip to step 6
- 3. To add a new address, click "Add" in the lower left
- 4. Enter the desired information (put apartment information or alternate name in the "Optional" tab
- 5. Save your changes and close.
- 6. In the order details screen, click the "Alt Adr" chicklet



- 7. Click once on the desired address/email to select it.
- 8. Click again on an address/email to deselect.
- 9. Notice that the Alt Adr box now reads "P" for postal, "E" for email, or "PE" for both

### Sell a CYO/Pick Package

- 1. Make sure you are in the right Mode of Sale. (TP Call Center or POA Call Center)
- 2. In the "line items" tab of the "Order Details" screen, click the "Add" button in the lower left
- 3. Select the appropriate package.
- 4. Press "tab" on the keyboard or click the empty blue rectangle



- 5. Click once on a show to add it to the package. Click again to remove it.
- 6. Click "OK"
- 7. Select your Price Type
- 8. Seat each show individually in the seat map. Use the tiny arrows next to "Perf List" to navigate between shows, or click "Perf List" to see a listing of shows with the seating status of each. (see screenshot, below)

