

# 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)



Search Mechanism

☐ Basic Search ☒ Advanced Search ☐ Attribute Search

Advanced Search:

Gift Certificate No [v] Equal to [v] F321-2738285

Attribute Search:

[v] [v]

Clear Cancel Close

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.*

General	Names	Addresses	Contributions	Associations			
History	Contacts	Contributions	Transactions	Ticket History			
<input type="radio"/> Transaction: <input checked="" type="radio"/> Payments <input type="radio"/> Seat History <input type="radio"/> Credit Cards <input type="radio"/> Audit				<input type="checkbox"/> Group Payments <input type="checkbox"/> Show Detail			
Transaction No.	Amount	Date	Payment Method	Gift Certificate No.	Account No.	Check No.	Check Name
5450662	\$50.00	12/23/2011 12:35	2 TP VISA (B.O.)		****_****_****-7023		GLENAVIE NORTON
5395638	\$25.00	12/1/2011 12:51	PBA Dev. Visa		****_****_****-7023		Glenavie Norton
5053936	\$249.00	5/19/2011 17:25	POA Only 1TP VISA (Subs. Service)		****_****_****-7023		Glenavie Norton
4997981	\$322.00	4/22/2011 18:11	TP 1VISA (Subs. Service)		****_****_****-7023		Glenavie Norton
4432372	\$83.35	7/12/2010 10:08	TP 1VISA (Subs. Service)		****_****_****-7023		
4432173	\$114.25	7/12/2010 09:51	TP 1VISA (Subs. Service)		****_****_****-7023		
4384518	\$83.35	6/12/2010 13:36	TP 1VISA (Subs. Service)		****_****_****-7023		
4384330	\$114.25	6/12/2010 13:23	TP 1VISA (Subs. Service)		****_****_****-7023		
4320293	\$83.35	5/12/2010 10:38	TP 1VISA (Subs. Service)		****_****_****-7023		
4320254	\$114.25	5/12/2010 10:35	TP 1VISA (Subs. Service)		****_****_****-7023		
4295486	\$83.35	4/30/2010 09:27	TP 1VISA (Subs. Service)		****_****_****-7023		Glenavie Norton
4249316	\$114.25	4/9/2010 11:16	TP 1VISA (Subs. Service)		****_****_****-7023		Glenavie Norton
3707662	\$22.00	7/20/2009 10:09	TP 1VISA (Subs. Service)		****_****_****-8034		Glenavie Norton
3707370	\$35.00	7/19/2009 18:32	TP 1VISA (Subs. Service)		****_****_****-8034		Glenavie Norton
3695859	\$210.00	7/13/2009 09:15	TP 1VISA (Subs. Service)		****_****_****-8034		
3677281	\$210.00	6/29/2009 10:14	TP 1VISA (Subs. Service)		****_****_****-8034		Glenavie Norton
3475609	\$262.00	3/27/2009 16:38	TP 1VISA (Subs. Service)		****_****_****-8034		Glenavie Norton
3323144	\$103.00	12/27/2008 16:10	TP 2VISA (Call Center)		****_****_****-8034		Glenavie Norton
3053848	\$132.00	7/21/2008 10:10	TP 1VISA (Subs. Service)				Glenavie Norton
2804668	\$482.00	3/26/2008 10:40	TP 1VISA (Subs. Service)				GLENAVIE NORTON
2775939	\$12.00	3/11/2008 16:15	2 TP VISA (B.O.)				JORGE ALBERTO NA
2775939	\$25.00	3/11/2008 16:15	TP Gift Certificate	3092-1016272			
2431798	\$117.40	9/10/2007 09:06	TP 1MasterCard (Subs. Service)				Glenavie Norton

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

1. In the “constituents” 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

Const ID: <Gen.Public> Src: Solicitor: jbecker Delivery: U.S. Mail Hold Until: 00/00/0000  
 Order #: <New> Date: 09/28/2011 MOS: TP Call Center Channel: TP - Default Channel Pmt: No Alt Adr: No  
 Notes: Category: (none)

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

Const ID: <Gen.Public> Src: Solicitor: jbecker Delivery: U.S. Mail Hold Until: 00/00/0000  
 Order #: 9935674 Date: 09/28/2011 MOS: TP Call Center Channel: TP - Default Channel Pmt: No Alt Adr: No  
 Notes: Category: (none)

Pkg	Perf	Description	Date & Time	Price Type	Zone	Pur	Pur Amt	Ret	Ret Amt	Std	AU	SR
12KPPICK						0		0		0		

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)

Seat Types Price Zones Best Seating Sections Allocations Holds Perf List Housemap Seat Type Legend ( )

Performance List

Description	Perf Dt	Seats Assigned/Needed
12BW0928IE	9/28/2011 07:00 PM	2 / 2
12KP1001VE	10/1/2011 08:00 PM	0 / 2
12BW0930IE	9/30/2011 08:00 PM	0 / 2