



# Hello

# and Welcome

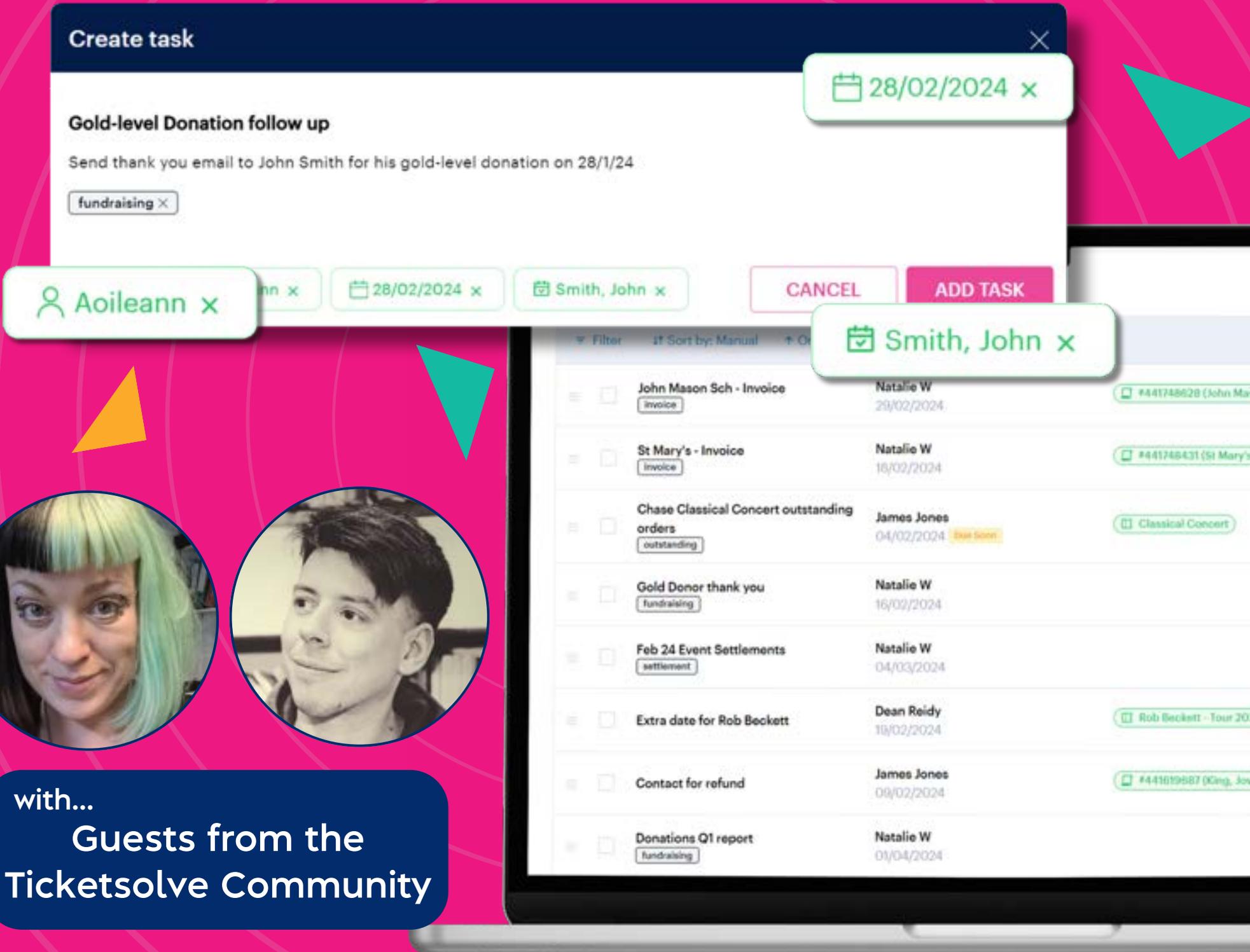
Feature Focus:

# TASKS

Your Ultimate Productivity Tools



with...  
Guests from the  
Ticketsolve Community



**Create task**

**Gold-level Donation follow up**

Send thank you email to John Smith for his gold-level donation on 28/1/24

**fundraising**

**Aoileann**

**28/02/2024**

**Smith, John**

**CANCEL** **ADD TASK**

Filter	Sort by: Manual	+
<input type="checkbox"/>	John Mason Sch - Invoice <b>Invoice</b>	Natalie W 29/02/2024 <b>#441748628 (John Mason Sch)</b>
<input type="checkbox"/>	St Mary's - Invoice <b>Invoice</b>	Natalie W 18/02/2024 <b>#441748431 (St Mary's Sch)</b>
<input type="checkbox"/>	Chase Classical Concert outstanding orders <b>outstanding</b>	James Jones 04/02/2024 <b>Use Score</b> <b>Classical Concert</b>
<input type="checkbox"/>	Gold Donor thank you <b>fundraising</b>	Natalie W 16/02/2024
<input type="checkbox"/>	Feb 24 Event Settlements <b>settlement</b>	Natalie W 04/03/2024
<input type="checkbox"/>	Extra date for Rob Beckett	Dean Reidy 11/02/2024 <b>Rob Beckett - Tour 2024</b>
<input type="checkbox"/>	Contact for refund	James Jones 09/02/2024 <b>#441619587 (King, Jovita)</b>
<input type="checkbox"/>	Donations Q1 report <b>fundraising</b>	Natalie W 01/04/2024

# What we'll cover

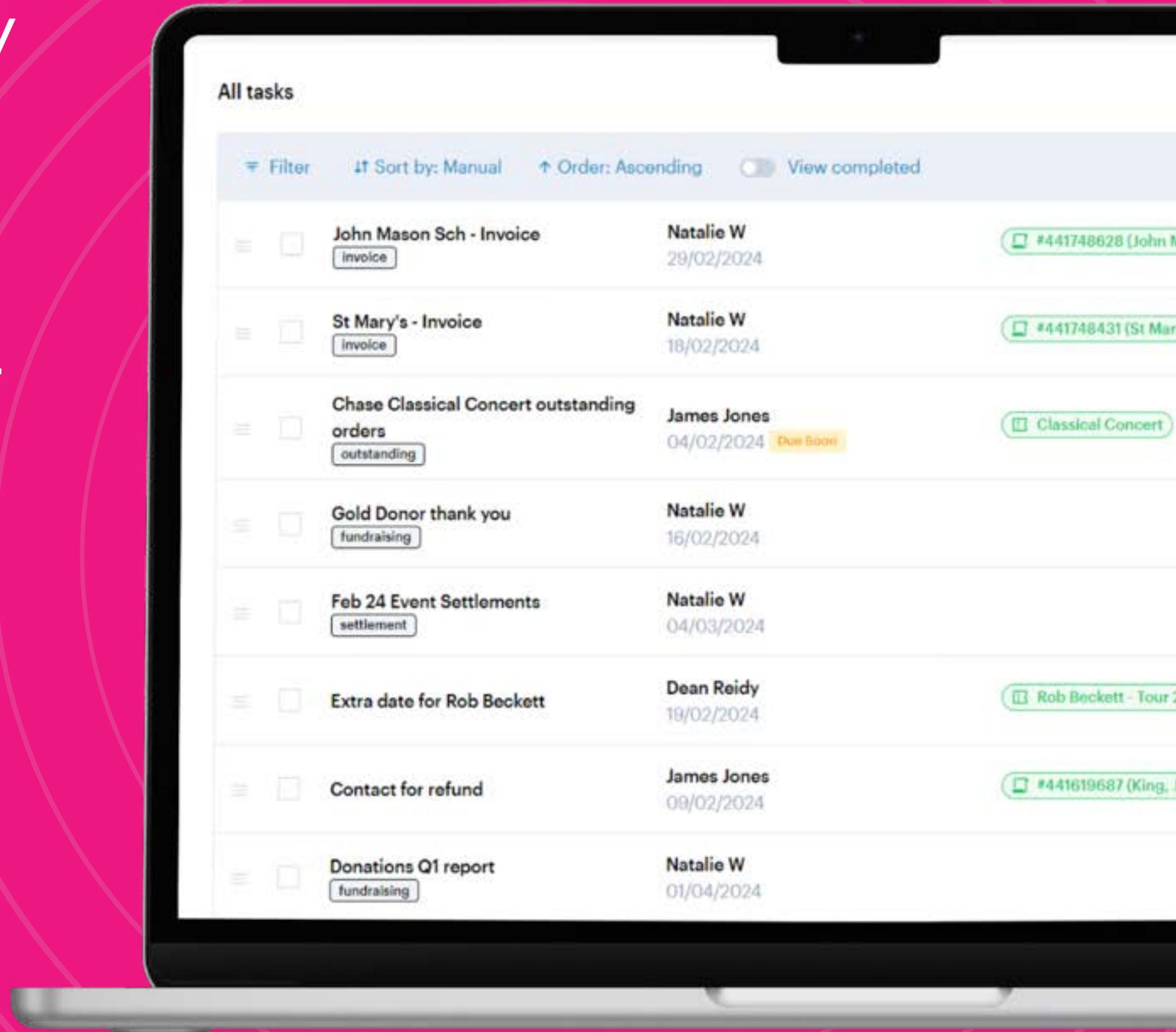
- An insight into our brand new functionality suite of tools
- Snapshot demo: Introducing the Ticketsolve Tasks tool
- Hear it first-hand from members of our community
- Why we're enhancing more features & releasing new functionality including CRM, Fundraising, Project Management, Productivity and much more!

**Focusing on CRM &  
Productivity:  
Ticketsolve Tasks**

Our new tool brings activity and team management directly into your workflow in Ticketsolve

One centralised system for all outstanding work so that nothing is missed and all team members are aligned

From day-to-day admin to your larger strategic projects, tasks is central to driving productivity!



Assign to a User, set a due date, and integrate directly with Shows, Orders, and Customers

Use Tags to group into projects and create custom Task Views

View your objectives and collaborate across Ticketsolve Users

Track progress using Comments

**Create task** [X]

**Gold-level Donation follow up**

Send thank you email to John Smith for his gold-level donation on 28/1/24

fundraising [X]

28/02/2024 [X]

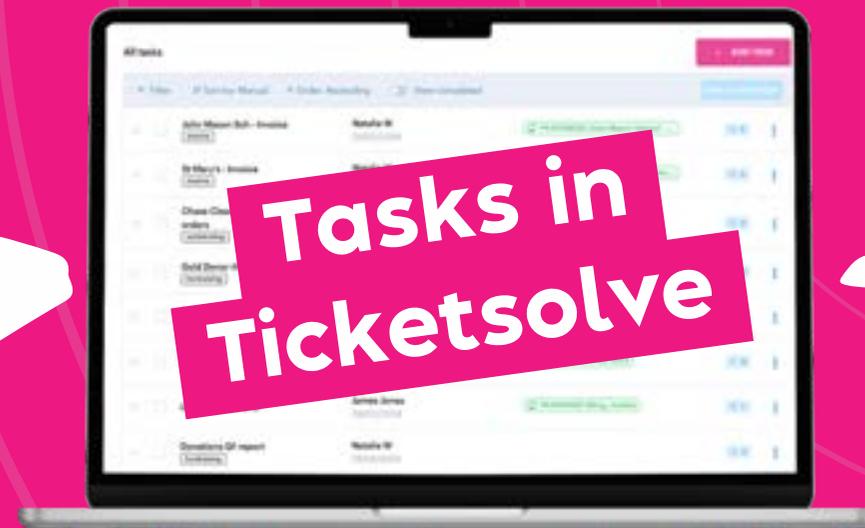
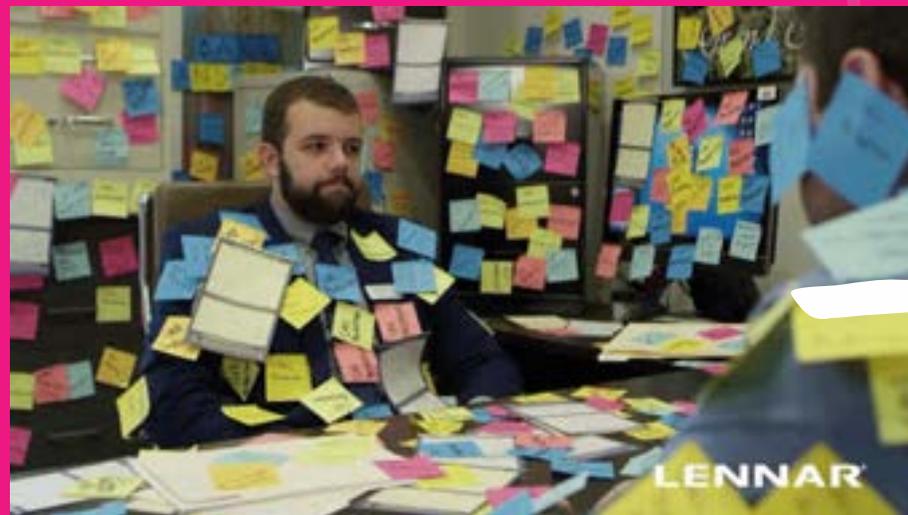
Aoileann [X] [X] 28/02/2024 [X] [X] Smith, John [X]

CANCEL ADD TASK

[X] Smith, John [X]

# Get started and jump in. . .

- Organising and prioritising tasks
- Tracking work and monitoring goals
- Managing team members and activities
- Driving collaboration and communication



**Let's take a look...**

# Taskspiration

with Aaron & Sveta



**Sveta Antonova**  
Box Office Manager &  
Events Manager  
**Komedia Bath**



**Aaron Holdaway**  
Ticketing and Sales  
Manager  
**New Theatre Royal  
Portsmouth**

## Edit task



 0 Comments

### Sveta's Taskpiration!!

- You can create Box Office downtime tasks for the team to complete during quieter hours.
- It's great for shift work, for example the Box Office team (can give the team tasks without needing to speak to or see the next person on shift)
- It helped us work together on projects to improve our current processes (We made and introduced reusable cloakroom tags).
- The comments function allowed us to work together on tasks and projects. (Tidying of Ticketsolve e.g. pricing schemes I wouldn't have time to do alone)
- Using tasks to note reservations, they can be assigned to the colleague working on shift and allow you to clearly inform the customers needs.

Tip - Using tags for custom views :

- Use the Downtime tag creating a custom view for all of the tasks that any box office team member can do when the venue is quite
- Use the Supervisors Only tag to create a custom view for all the tasks that can only be completed by the supervisor.

taskpiration ×

 Tags

 Natalie W ×

 Due date

 Attach to

CANCEL

SAVE TASK

## Edit task



 0 Comments

### Aaron's Taskpiration!!

- It allows me to easily track my daily to-dos as well as longer term aims.
  - The tasks feature doesn't only have to focus on venue tasks. It can be used for general to do's and daily reminders for the things that are just as important as work!
  - It prevents the worry of important tasks getting missed in the busy day to day. Why not open tasks on your tablet computer and have it with you throughout the day.
  - Use it to remind you to contact customers when a show goes onsale. Assign it to your customer so you can notify them as soon as the show is available for booking.
- Tip - Using sort option to create a custom due date view :
- Use the filter and sort options to create a custom view for all tasks assigned to you in order of their priority.

taskpiration ×

 Tags

 Natalie W ×

 Due date

 Attach to

CANCEL

SAVE TASK

**Why we built  
Tasks...and  
what's next?**

Tasks is the first of a suite of management and productivity tools to enhance Ticketsolve's functionality as your all-in-one CRM hub...

...This includes more powerful strategic project management and fundraising capabilities...

... And streamlined workflows for customer communications using inbuilt Automations



# Projects

The image displays a project management interface for the 'Green Futures Initiative' as of 05/03/2023. The main view is a Kanban board with five columns: Prospect, Contacted, Interested, Pledged, and Donated. Each column contains cards representing project items, with an 'Add Card' button at the bottom of each column. A detailed view of a 'Prospect' card is shown on the right side of the image.

**Project Overview:** Green Futures Initiative (05/03/2023)

**Columns and Cards:**

- Prospect:**
  - Scott Rubbathan: Office Meeting with Micheal (Refund, Meeting, Boxoffice)
  - Alex Taylor: Emma Brown (Refund, Boxoffice)
  - Scott Rubbathan: The Riverside Company
  - Alex Taylor: Michael Green Sustainability
  - Oliver Rodriguez: The Riverside Company
- Contacted:**
  - Aisha Patel: Sophia Taylor (retroevents)
  - Aisha Patel: Johnson Family Trust (Refund, Housekeeping, vip)
- Interested:**
  - Mia Cheng: Liam and Olivia Wilson (Refund, common)
- Pledged:**
  - Scott Rubbathan: Micheal
- Donated:**
  - Scott Rubbathan: Nora and Jake Evans (Refund, vip, urgent)

**Prospect Card Detail:**

- Project: Office Meeting with Micheal
- Assignee: Scott Rubbathan
- Tags: Refund, Meeting, Boxoffice
- Progress: 3/3

# Automations

HOME > MANAGE > AUTOMATIONS

Automations ADD NEW +

Filter automations

3 listings Hide

- 3 Donations Automation
- 2 First Time Customer**
- 5 Never Booked

**First Time Customer** ...

Tags and emails customers who have placed their first order.

Active DISABLE

firsttimecustomer

regent theatre  
IPSWICH

CORN EXCHANGE  
IPSWICH

Dear Nick,

We've noticed that this is your first order with us, so thank you for becoming a customer. We are excited to welcome you soon and we hope you have a brilliant visit.

As this is your first time visiting us, keep an eye out for more information about your upcoming visit. If you have any questions in the meantime, please don't hesitate to reach out to us.

Warm regards,

Test 002

regent theatre  
IPSWICH  
3 St. Helen's Street  
Ipswich, IP4 1HE  
View all our upcoming shows and events at  
ipswichtheatres.co.uk  
@ipswichRegent

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IPSWICH  
King Street,  
Ipswich, IP1 1DH  
@ipswichCE

# Thanks for listening!

Help  
articles  
on Tasks



Tasks  
feedback  
form



Need a hand?  
Get in touch!



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