Box Office Fundamentals Walkthrough

Contents

ticketsolve

Logging in to Ticketsolve

1. **Open Your Browser**
   - Use a recommended browser like Google Chrome (Ticketsolve is optimized for Chrome).
   - Ticketsolve works best on desktop PCs, laptops, or large-screen tablets but is not optimized for mobile devices.

2. **Enter Your Admin URL**
   - In the browser's address bar, type your venue's unique Ticketsolve URL.
   - Example: **https://myvenue.ticketsolve.com/admin**
   - Replace **'myvenue'** with your venue's subdomain.

   If you're unsure of the URL, contact your system administrator.

3. **Enter Your Username and Password**
   - On the login page:
     - Enter your username in the designated field.
     - Enter your password in the field below the username.

   These credentials will be provided by your system administrator.

4. **Select Your Access Role**
   - Use the Role dropdown menu to choose the role associated with your account (e.g., Box Office, Super Admin).
   - Selecting the correct role is essential for logging in. If you're unsure, contact your system administrator.

5. **Select Your Location (If Applicable)**
   - If your venue operates across multiple locations, use the Location dropdown to select where you are working (e.g., Main Box Office).

   If unsure, check with your team.

Logging in to Ticketsolve

6. **Start or Join a Sales Session (If Required)**
   - Tick the "Start or Join Sales Session" box if sales sessions are mandatory for your account.
   - After logging in, you can:
     - Start a new sales session.
     - Join an existing sales session.

   If this step isn't mandatory, you can skip it.

7. **Enable Two-Factor Authentication (If Enabled)**
   - If 2FA is enabled, you will be prompted to:
     - Link to an authenticator app.
     - Enter your six-digit verification code.

8. **Click Log In**
   - Once all the details are entered correctly, click the Log In button to access your account.

9. **Welcome to Ticketsolve**
   - After successful login, you will be directed to the Ticketsolve dashboard.

Navigating Ticketsolve

Locate the Navigation Menu

- The navigation menu is on the left-hand side of the screen, beneath the Ticketsolve 'T' logo.

2. Expand the Menu

- Click on the 'T' logo or the three-line icon to expand the menu.

  The menu will open to the last section you accessed.

3. Navigate the Menu Sections

- The main tabs available in the menu are:
  - Box Office: Manage ticket sales and events.
  - Customers: View and manage customer accounts and bookings.
  - Manage: Configure shows, pricing, and products.
  - Reports: Access detailed sales and system reports.
  - Users: Manage user accounts and permissions.
  - Settings: Adjust system-wide configurations.

4. Join or Start a Sales Session

- If you need to join a sales session after logging in:
  - Open the menu and scroll to the bottom.
  - Click on 'Join a Sales Session'.
  - Select either an existing session or choose to start a new session.

Navigating Ticketsolve

Access the Help Section

- At the bottom of the navigation menu, you'll find a question mark icon.
- Click it to open the Help Desk
- Use the search bar to find relevant help articles by typing in keywords (e.g., "amending an order").
- Open help articles directly in the pop-up window or expand them into a new tab for a larger view.

5. Submit a Query to Support

- If you can't find an answer, submit a query by clicking 'Leave a Message'.

    - Fill out the online form with your question or issue.
    - An auto-generated URL will link to the section of Ticketsolve you're working in (this can be removed if not needed).
    - Attach up to five files (e.g., images or documents) if necessary.
    - Click Send to submit your query to the support team.

Creating a Customer

1. **Navigate to the Assign Customer Option**

    - Go to the top right corner of the screen and click "Assign Customer".

      This allows you to search for existing customers in the system.

2. **Add a New Customer**

    - If the customer doesn't already exist, click "Add/Create New Customer" below the search box.

      *This will open the **Add New Customer** window.*

3. **Fill in Customer Details**

    - On the left side of the window, provide the required customer details and address information:

        - Fields marked with a red asterisk (*) are required for transactions (e.g., First Name, Last Name).
        - Optional fields (e.g., Phone Number) can be added if relevant.

4. **Select the Customer Type**

    - On the right side, choose the customer type:

        - **Person**: For individual audience members.
        - **Organization**: For groups or entities like schools or tour parties.

          When selected, additional fields will appear for the organisation name and contact name.

5. **Membership Setup (Optional)**

    - Click the Membership button to send the customer an email to set up their password.

      This links their online bookings to their account details, avoiding the need to re-enter information.

Creating a Customer

6. **Assign Customer Categories (Optional)**

    - Use Customer Categories to group customers for reporting or segmentation purposes (e.g., Group Booker, Volunteer, Staff).

      Categories can be customized by your venue.

7. **Apply Tags (Optional)**

    - Add tags for reporting or discounts.
    - Use the **search bar** to find existing tags, or type to create new ones.
    - To remove a tag, click the X next to it.

8. **Marketing Opt-Ins**

    - Select whether the customer agrees to receive marketing communications (e.g., email, post).

      You can update this preference later if needed.

9. **Agree to Terms and Conditions**

    - Ensure the customer agrees to your organization's terms and conditions (e.g., refund and cancellation policies).

      This is usually auto-selected, but you can tick it manually if required.

10. **Add the New Customer**

    Once all required fields are complete, click "Add New Customer" to save the customer to your database.

Selling a ticket on an unreserved event

1. **Access the Box Office Page**
    - Ensure you are on the Box Office listing page.
        - If you're elsewhere in Ticketsolve, click on the Box Office tab in the navigation menu to return to the correct page.
2. **Find the Event**
    - Make sure the "Events" tab is selected (not "Products").
    - Use the search box to locate the event by typing the event name, associated tags, or keywords.

      Alternatively, use the calendar view to search by date or date range.
3. **Assign a Customer to the Order**
    - Search for an existing customer by typing their name in the customer search box.
    - Select the appropriate customer from the list, noting any labels for memberships or benefits.
    - If the customer isn't listed, create a new customer (if needed).

      Choose the order type (e.g., Box Office, Phone) from the dropdown menu.
4. **View Event Details**
    - Click on the event name or event details to view additional information about the event, such as:
        - Total tickets available and sold.
        - Tickets currently in carts.
        - Reserved or blocked tickets.
5. **Select Tickets**
    - On the ticket-selling screen, select the desired ticket allocation (e.g., Full Price, Concession).
    - Use the **+/-** buttons to increase or decrease the number of tickets, or type the number directly.
    - Once the tickets are selected, click Update Cart to add them to the order.

Selling a ticket on an unreserved event

6. **Add Additional Items (Optional)**
    - Add workshops, merchandise, or other products to the cart if required.
7. **Choose Fulfilment Options**
    - Select how the tickets will be delivered:
        - E-Ticket: Email tickets to the customer.
        - Postage: Charge for postal delivery (e.g., £3 for postage).
        - Collection: Allow pickup at the box office.

    Fulfilment charges will automatically update the order total.
8. **Complete the Payment**
    - Click **Payment Options** to proceed to the payment screen.
    - Select the payment method (e.g., Cash, Credit Card, Chip and Pin, Voucher, etc.):
        - For cash or chip and pin: Process the payment externally and confirm it in Ticketsolve.
        - For credit card: Enter the card details directly in Ticketsolve.
9. **Confirm the Order**
    - Review the order summary to ensure everything is correct.
    - Choose one of the following:
        - **Confirm and Print**: Print tickets immediately.
        - **Confirm Order**: Finalize the order for batch printing or fulfilment later.
10. **Return to the Box Office View**

    Once the order is complete, Ticketsolve will return to the Box Office listing page.

Selling a ticket on a seated event

1. **Access the Box Office Page**
    - Ensure you are on the Box Office listing page.

      If you're elsewhere in Ticketsolve, click on the Box Office tab in the navigation menu to return to the correct page.

2. **Find the Event**
    - Use the search bar to locate the event by entering the event name, tag, or venue.

      Alternatively, filter by date or date range using the calendar options.

3. **Assign the Customer**
    - Search for and select the customer associated with the order.
    - Choose the order type (e.g., Box Office, Phone).

4. **Open the Seating Map**
    - Click **View Tickets** for the selected event.
    - The seating map will appear, displaying rows, seat numbers, and blocked/unavailable seats.
    - Use the **"Full Screen"** button or zoom options to view the seating map more clearly.

5. **Select Seats**
    - To choose individual seats, click on the corresponding dots on the seating map.
    - Selected seats will have a black circle around them.

    - **For multiple selections:**
        - Hold Shift while clicking additional seats.
        - Alternatively, click and drag to "lasso" a group of seats.

Selling a ticket on a seated event

6. **Assign Ticket Prices**

    - Once seats are selected, assign ticket prices from the list (e.g., Full Price, Concession).

      The ticket prices and availability (Box Office and/or Online) will be displayed.

7. **Review and Update the Cart**

    - Exit the seating map to view the cart.

    - The cart will display:

        - Event name.
        - Seat numbers and ticket details.
        - Total cost.

      Adjust the cart as needed (e.g., add or remove items).

8. **Choose Payment Options**

    - Proceed to the Payment Options screen.
    - Select the payment method (e.g., Cash, Credit Card).

      For cash payments, process the payment outside Ticketsolve and mark it as paid.

9. **Confirm and Print the Order**

    - If the customer is collecting tickets immediately, click Confirm and Print to finalize the order and print the tickets.

    - If tickets are to be fulfilled later (e.g., by email or postage), select the appropriate fulfilment option.

10. **Complete the Order**

    Once the order is confirmed, Ticketsolve will return to the Box Office listing page.

Selling a product

1. **Assign a Customer**
   - Begin by assigning a customer to the order.
   - Ensure you have selected the correct order type (e.g., Box Office, Phone).

2. **Switch to the Products Tab**
   - Navigate to the Products tab in the Box Office area.

   This tab provides an overview of all available products in your system.

3. **Search for a Product**
   - Use the search bar to locate a product by name or description (e.g., type "raffle" to find a raffle ticket).
   - Filter by product type (e.g., Regular Products, Vouchers, Donations, Membership Benefits).

   Sort products by date/time, alphabetical order, or price for easier navigation.

4. **Select a Product**
   - Click on the desired product to open its details.
   - Adjust the quantity of the product using the **+/-** buttons, or type the number directly.
   - Once satisfied, click Update Cart to add the product to the order.

5. **Add Additional Products (Optional)**
   - Add more products to the cart (e.g., donations or vouchers).

   For donations, preset amounts or custom amounts can be added.

Selling a product

6. **Return to Events (Optional)**

   - If required, switch back to the Events tab to add tickets or seating to the order.

     All selected items will be consolidated in the cart on the right-hand side.

7. **Review the Cart**

   - The cart provides a breakdown of all items in the order, including:

     - Product names.
     - Quantities and prices.
     - Total cost.

8. **Proceed to Payment Options**

   - Choose a payment method (e.g., Cash, Credit Card, Chip and Pin).

   - For cash payments:

     - Enter the amount received.
     - Ensure the Payment Summary shows the correct amount paid and no outstanding balance.

9. **Confirm the Order**

   - Finalize the transaction by clicking Confirm or Confirm and Print (*if immediate printing is required).*

10. **Return to Box Office View**

    After confirmation, Ticketsolve will return to the Box Office listing page, ready for the next transaction.

Amending an order

Amending an Order for an Unreserved Event

1. **Search for the Order**
   - Navigate to the Box Office tab.
   - Use the Search Order field to locate the order by:
     - Show name.
     - Customer details.
     - Order number or date.
2. **Access the Order**
   - Once the order appears, click the three dots next to it.
   - Select **Amend Order** to proceed.
3. **Review the Carts**
   - The screen will display two carts:
     - **Original Cart**: Contains the original order details.
     - **Amending Cart**: Shows the updated order details.
4. **Make Changes**
   - To remove a ticket:
     - Click Manage Item, select the ticket, and click Remove Item.
   - To update ticket quantities:
     - Click the title of the event and adjust the ticket count using the **+/-** buttons or by typing directly.
   - Click **Update Cart** to save changes.
5. **Review Payment Summary**
   - Check the updated cart for any changes in the total amount.
   - If a refund is due, use the Refund button (*dollar icon*) to process it.

     Refunds should ideally match the original payment method (e.g., cash for cash, card for card).

Amending an order

6. **Finalize the Order**

   Once all adjustments are made, click Confirm and Pay to finalize the order.

Amending an Order for a Seated Event

1. **Search for the Order**
   - Follow the same steps as above to locate the order.
2. **Access the Seating Map**
   - Select the order and click Amend Order.
   - Click the event title to open the seating map.
3. **Modify the Seats**
   - Select the seat(s) to adjust.
   - Update the seat price if necessary (e.g., change from Concession to Full Price).
   - Use the seating map to add or remove seats as needed.
4. **Review the Updated Cart**
   - The Amending Cart will display the updated seat and ticket details.

   Check for any outstanding amounts (e.g., additional payment or refund).
5. **Process Payments**
   - **If additional payment is required**:
     - Select a payment method (e.g., Chip and Pin, Cash).
     - Use the PDQ machine or process the payment through Ticketsolve.
   - **If a refund is required**:
     - Use the Refund button and follow the steps to issue the refund.
6. **Confirm the Order**

   Click Confirm and Pay to complete the order.

Refunding an order

1. **Find the Order**
    - Go to the Box Office tab and click **Search Orders**.
    - Locate the order by using:
        - Show name.
        - Customer details.
        - Order number.
    - Once the order appears, click the three dots next to it and select Amend Order.
2. **Review the Carts**
    - The screen will display:
        - **Original Cart**: Contains all the original order details.
        - **Amending Cart**: Shows the updated order details.
3. **Remove Items**
    - Click Remove Items for tickets, products, and fulfilment options to clear the order entirely.

      Ensure that no items remain in the cart.
4. **Check the Outstanding Amount**
    - The system will calculate the total amount to be refunded and display it at the bottom of the screen.

Refunding an order

5. **Proceed to Payment Options**
    - Click Payment Options to go to the payment summary screen.
6. **Process the Refund**
    - Select the appropriate refund method:
        - **Cash or Chip and Pin**: Refund manually outside of Ticketsolve, then mark it as refunded in the system.
        - **Credit Card**: The refund will automatically process to the customer's card (if the original payment was made within the last 180 days).
    - Use the Refund button (**dollar icon with a backward circle**) to process the refund.
    - Confirm the refund type (e.g., MasterCard, Cash) and click Add Refund.
7. **Confirm the Order**
    - If you do not want to send a confirmation email to the customer, check the box labelled Skip Sending Confirmation Email.
    - Click Confirm Order to finalize the refund.
8. **Complete the Refund**

    Once confirmed, the order summary will display, and after a few seconds, you will return to the Box Office screen.

Reserving an order

1. **Navigate to the Box Office**
   - Go to the Box Office area in Ticketsolve.
   - Use the search box to locate the show by name or date.
2. **Assign a Customer**
   - Assign the customer to the order by selecting their record or creating a new one if necessary.
3. **Select Tickets**
   - Choose the tickets for the event:
     - For seated events: Use the seating map to select specific seats.
     - For unreserved events: Choose the ticket quantity and type.
4. **Review the Order**
   - Ensure the order details (e.g., ticket types, quantities, and total cost) are correct in the cart.
5. **Go to Payment Options**
   - Scroll down and click Payment Options.
6. **Reserve the Order**
   - Click the Reserve Order button.

Reserving an order

7. **Set the Reservation Expiry Date**
   - Choose the date when the reservation will expire:
     - For public bookings, set a typical reservation period (e.g., 1-2 weeks).
     - For group bookings (e.g., schools), set a longer reservation period if required.

   Example: If today is March 27th, you might set the expiry date to April 3rd.

8. **Confirm and Save**
   - Click Save to finalize the reservation.

9. **Reservation Notes**
   - The reservation will hold the tickets until midnight of the expiry date.

   If payment is not received by the expiry date, the reservation will be canceled, and the tickets will be released back into the system.

Reassigning an order to a new customer

1. **Find the Order**
   - Navigate to the Box Office view.
   - Locate the order using one of the following methods:
     - Event Summary: Search for the event and find the order in the summary.
     - Customer Search: Use the Customers tab to locate the customer associated with the order.
     - Search Orders: Go to the Box Office tab and use the Search Orders option.
2. **Access the Order**
   - Once you've found the order, click the three dots next to it and select View Order.

     This will open the Order Summary page, displaying details about the order and the current customer.
3. **Go to Customer Info**
   - Click on the Customer Info tab in the order details.
   - You'll see the current customer assigned to the order.
4. **Remove the Current Customer**
   - Click the X next to the customer's name.
   - Confirm the action to remove the current customer and reassign the order.

Reassigning an order to a new customer

5. **Assign a New Customer**
   - To assign a new customer, you can:
     - **Search for an existing customer**: Use the search box to find and select an existing customer (e.g., "Dave Smith").
     - **Create a new customer**: Click Create New Customer and enter their details.

   Once assigned, the new customer's information will populate in the Customer Info section.

6. **Verify the Changes**
   - Return to the Order Summary tab to ensure the order details now show the new customer's information.

7. **Complete the Reassignment**

   Confirm that all details are correct, including the new customer's name and information.