Box Office Advanced Walkthrough

ticketsolve

Contents

ticketsolve

Sales Sessions

What Are Sales Sessions?

Sales sessions allow you to track sales for individual users during their shift. All transactions during the session are recorded, enabling detailed reporting. Sales sessions can be optional or mandatory depending on your organisation's configuration.

Starting or Joining a Sales Session

Log In to Ticketsolve

- Enter your login credentials as usual.
- At the bottom of the login popup, select Start or Join a Sales Session.

Start a New Session

- Choose Start a New Session to begin tracking sales for your shift.
- You will now be ready to process sales in the Box Office.

Mandatory Sales Sessions

- If sales sessions are mandatory, you won't be able to process sales until you join a session.

Rejoin a Session After a Break

- To take a break, close the browser tab with Ticketsolve.
- When you reopen Ticketsolve, you'll have the option to Rejoin your Original Sales Session.

Viewing Your Sales Session

- Click the Ticketsolve 'T' Icon in the navigation bar.

- The pop-up will display:

    - Your current session details.
    - The date, time, and location you logged in.
    - Your session status.

Sales Sessions

Ending a Sales Session

Close the Session

- At the end of your shift, click the Ticketsolve 'T' Icon and select Currently In Session.
- Click End Session to finalize your shift.

Download the Sales Session Report

- After ending the session, choose one of the following options:
    - **Yes**: Download the report immediately.
    - **No**: Exit without downloading

      You can access the report later.

Reporting on Sales Sessions

Access the Sales Session Reports

- Go to the User Tab in the navigation bar.
- Select User Sales Sessions.

Choose a Sales Session

- Locate and select the sales session you wish to report on.

Review the Report Details

- The report includes three tabs:
    - **Summary**: Overview of items sold and payments received.
    - **Line Items**: Detailed breakdown of individual items sold.
    - **Payments**: Full list of payments taken and refunds processed.

Group Bookings

Finding the Show and Viewing the Seating Plan

1. **Locate the Show**
   - Navigate to the show in question within the Box Office area.
   - Click View Tickets to open the seating plan.
2. **Understand the Seating Plan Icons**
   - Refer to the Seat Legend to understand the meaning of the icons and the available options.

Selecting Multiple Seats

1. **Select Adjacent Seats**
   - Click directly on two or more adjacent seats to select them.
2. **Select Multiple Rows of Seats**
   - Hold the Shift key and use the mouse to lasso multiple seats in a row.
   - Keep the Shift key pressed to lasso additional blocks of seats across different areas of the seating plan.
3. **Monitor Your Selections**
   - As you select seats:
     - A count of the selected seats will appear in the top left corner of the screen.
     - This count includes all selected seats across multiple rows or sections.

Group Bookings

Setting Ticket Prices

1. **Assign a Ticket Price**
   - After selecting seats, move to the Ticket Prices section.
   - Choose the appropriate ticket price for all selected seats.
2. **Important Note**
   - All selected seats must have the same ticket price.
   - If seats require different prices, you will need to repeat the selection process for each price category.
3. **View the Allocation**
   - After selecting the ticket price, you'll see:
     - The total number of tickets selected.
     - The price assigned to these tickets.
   - Selected seats will change from a black tick to a black dot to confirm the allocation.
4. **Add Seats at Different Prices**
   - To assign a different price to other seats, repeat the selection process with a new price.

Returning to the Cart

1. **Finish Seat Selection**
   - Once all desired seats are selected and priced, click the X in the seating plan to return to the Cart view.

Collections

Creating an Order with Payments Outstanding

1. **Start a Ticket Sale**
    - Go to the Box Office tab and create an order as usual.
    - Add the required tickets to the cart.
2. **Assign a Customer**
    - Assign an existing customer or create a new customer record.
    - Ensure the customer's email address is entered correctly.
3. **Enable Partial Payment**
    - Click on Payment Options at the bottom of the cart.
    - Tick the Allow Outstanding option (it will turn blue) to enable an outstanding amount to remain on the order.
4. **Process the Order**
    - **For a partial payment**: Enter the amount paid and click Confirm Order.
    - **For payment later**: Click Confirm Order without entering a payment.
5. **Fulfilment Notes**
    - If the order includes print-at-home or e-ticket fulfillment, the customer will receive the ticket in their confirmation email unless you check Skip Sending Confirmation Email.
    - Clicking Confirm and Print will print tickets even if Allow Outstanding is enabled.

Collections

Reporting and Requesting Payments

Accessing Collections

1. Navigate to the Box Office tab and select Collections.

2. View all orders with outstanding amounts, starting with the most recent.

Search for Specific Orders

- Use the search bar to locate orders by:
  - Keywords.
  - Program name.
  - Show or event name.

Emailing Customers About Outstanding Payments

1. **Email All Customers with Outstanding Amounts**
   - Select all orders and click Email All Customers.
   - Enter the email subject, any BCC email addresses, and your message in the content box.
   - Click Send Email to send the payment requests.

2. **Email Specific Customers**
   - Select specific orders and click Email Customers.
   - Follow the same steps as above to customize and send the email.

Collections

Downloading Reports for Outstanding Payments

Amounts Due by Event

1. Go to Reports > Sales Reports.
2. Use the search box to find Amounts Due by Event.
3. Select the desired report format.
4. Generate the report for all events or filter by a specific show tag.
5. Click Save As or Generate Report to download the report.

Amounts Due by Order

1. Go to Reports > Sales Reports.
2. Use the search box to find Amounts Due by Order.
3. Select the desired report format.
4. Click Save As or Generate Report to download the report.

Filtering Orders with Outstanding Amounts

- Go to Box Office > Search Orders.
- Use the filter for Outstanding to find any orders with unpaid balances.

Carts

What Are Carts?

Carts contain transactions that are currently in progress, either online or at the box office. Managing carts is useful for:

- Assisting customers with incomplete online bookings.
- Adjusting or completing transactions at the box office.
- Handling collections.

Locating a Cart

1. **Navigate to Search Carts**
    - Go to the **Box Office tab** and select **Search Carts**.
2. **Review Cart Details**
    - All open carts will be listed with the following information:
        - **Cart ID**: A unique identifier for the cart.
        - **Show Title**: The name of the event associated with the cart.
        - **Customer Name**: Displays the customer's name (if provided).
            - If blank, the customer details haven't been captured yet.
            - Clicking the name opens a summary of customer details (address, phone, and email).
        - **Cart Total**: The monetary value of the cart.
        - **Ticket Quantity**: The number of tickets in the cart.
        - **Created By**: Indicates if the cart was created online or by a staff member.
        - **Expiry Date**: Specifies when the cart will expire, releasing held tickets (typically 20 minutes for online carts).
        - **Order Type**: Shows how the order was placed (e.g., phone, online).

Carts

3. **Filter or Search Carts**

    - Adjust the number of results displayed using the **Results Per Page dropdown**.

    - Search for specific carts by **Show Title** or **Customer Name**.

Opening and Amending a Cart

1. **Open the Desired Cart**

    - From the **Search Carts** list, click on the cart or use the **three dots** on the far right and select **Open Cart**.

2. **View Cart Summary**

    - The cart summary displays:

        - Amounts paid or outstanding.
        - Cart ID number.
        - Tickets, products, and booking fees.
        - Customer details.
        - Total amount.

3. **Make Changes or Complete the Transaction**

    - Click **Open Cart** to make amendments or finalize the transaction.

4. **Important Note**

    - Opening a cart in the box office **disables online access** for the customer. Ensure the customer doesn't still need to complete the transaction online.

5. **Cancelling an Amendment**

    - To cancel any changes made to the cart, click **Cancel Amend** at the bottom right of the cart.

Carts

Deleting a Cart

1. **Locate the Cart**
    - Go to **Box Office > Search Carts** and select the desired cart.
2. **Delete the Cart**
    - In the cart options, choose **Delete Cart**.
    - Deleting a cart releases all items back into the box office inventory.

Adding or Viewing Cart Comments

1. **Find the Cart**
    - Navigate to **Box Office > Search Carts** and select the cart.
2. **Access Comments**
    - In the cart popup, click **Comments** to view or add notes.
3. **Add a Comment**
    - Click **Add Comment** to include a new note about the cart.

Applying Discounts

Applying Discounts During an Initial Sale

1. **Add Tickets to the Cart**
    - Start by adding tickets to the cart as you would during a normal sale.
2. **Options for Applying Discounts**
    - **Automatic Discounts**:
        - Discounts set to apply automatically will activate as soon as the required items are added to the cart.
    - **Promotion Code**:
        - Click the Promotion Code Icon.
        - Enter the promo code (not case-sensitive) into the box and press Save Changes.
        - A popup will confirm the successful application of the code.
        - To remove the promo code, press the Promotion Code Icon, select Clear Promo Code, and press Save Changes.
    - **Manual Discounts**:
        - These can be applied to the entire cart or individual items.

Applying Discounts

Discounting the Entire Cart

1. **Manage Cart**
    - Click Manage Item in the cart or press the Cart Icon.
2. **Apply Cart Discount**
    - In the popup, select Discount Cart.
    - Enter the percentage discount you wish to apply.
    - Optional: Check the box to apply the discount to booking charges.
3. **Finalize Discount**
    - Press Apply Discount to populate the discount column and reduce the total amount.
    - Press Update Cart to confirm the changes, or press Cancel to discard them.

Discounting Individual Items

1. **Select Items to Discount**
    - Add tickets to the cart and click Manage Item or the Manage Cart Icon.
    - In the popup, expand the dropdown to view cart items.
    - Select the specific items you want to discount by clicking the white boxes next to them.
2. **Apply Discount**
    - Press Discount Items.
    - Choose to discount by a percentage or a fixed amount.
    - If booking charges are included, check the box to apply the discount to booking charges.
    - Press Apply Discount and then Update Cart to confirm changes.

Applying Discounts

3. **Verify Discount**
    - Expand the dropdown to see individual discounted items.
    - To remove discounts, select the items and press Remove Discounts.

Applying Discounts to Amended or Completed Orders

1. Locate the Order
    - Go to the Box Office Tab and search for the order.
    - Click the three dots and select Amend Order.
2. Adjust Items
    - If discounts are required, you must first remove the tickets and re-add them to the cart.
    - Expand the dropdowns in the Manage Cart Popup to view ticket types, booking fees, and seat details.
3. Apply Discounts
    - Select the ticket or fee you want to discount and press Discount Items.
    - Choose to discount by a percentage or a fixed amount.
    - Optional: Apply the discount to associated booking charges.
4. Update or Cancel Changes
    - Press Apply Discount and then Update Cart to confirm.
    - Alternatively, press Cancel Amend to discard changes and leave the original order unchanged.

Completing the Transaction

Once discounts are applied, navigate to **Payment Options** to complete or reserve the order. **Finalize or Cancel Changes**. Confirm the changes by completing the transaction or click **Cancel Amend** to exit without changes.

Vouchers

Selling a Voucher

1. **Add Customer Details**
   - Add the customer's details to the cart.
2. **Navigate to the Products Tab**
   - Go to the **Products** tab in the **Box Office View**.
   - Locate the voucher you want to sell.
3. **Select Voucher Amount**
   - Choose either:
     - A **fixed amount** voucher.
     - A **custom amount** voucher by selecting a "zero" voucher and entering the desired amount in the currency box.
4. **Complete the Sale**
   - Select the voucher quantity.
   - Proceed to **Payment Options** and confirm the order.
5. **Voucher Confirmation**
   - The voucher is assigned to the customer's record.
   - The confirmation email includes the voucher's redemption code.
6. **Find the Redemption Code**
   - Use the **order information** (e.g., order number or customer details) to locate the order.
   - Click **View Order** and check the **Order History** for the redemption code.
   - Alternatively, go to **Box Office** > **Vouchers** and search for the customer's name to view voucher details, including redeemed and available balances.

Vouchers

Using a Voucher as Payment

1. **Prepare the Order**
    - Add items to the cart as normal.
    - Proceed to the **Payment Options** section.
2. **Select Voucher Payment**
    - Choose **Pay by Voucher**.
    - Search for the voucher by:
        - Customer name.
        - Voucher code.
3. **Apply the Voucher**
    - View the remaining voucher balance.
    - Choose to:
        - Use the **full remaining balance**.
        - Enter a **specific amount** to apply.
    - Click **Add Payment** to apply the voucher.
4. **Complete the Transaction**
    - Confirm the payment and finalize the order.

Vouchers

Merging Vouchers

1. **Locate the Customer**

    - Go to **Box Office** > **Vouchers**.

    - Use the **search bar** to find the customer using identifiers like:

        - Name.
        - Email address.
        - Phone number.

2. **Select Vouchers to Merge**

    - From the list, check the boxes for the vouchers you want to merge (at least two).

    - A **Merge button** will appear in the bottom-right corner.

3. **Merge Vouchers**

    - Click **Merge** to open the merge window.
    - Select the voucher to merge into by clicking the radio button next to it.

4. **Complete the Merge**

    - Choose one of the following options:

        - **Merge Only**: Save the merge without reprinting a ticket.
        - **Merge and Reprint**: Save the merge and reprint the ticket with the updated balance.

5. **Verify the Merge**

    - The selected vouchers are now merged into one.
    - Remaining vouchers will show a **zero balance**.

Merging Customers

Why Merge Customers?

Merging customer records ensures a clean database, better marketing accuracy, and an improved customer experience. Many individuals may have multiple email addresses or accounts, so merging them into their primary account helps streamline data.

Locate Duplicate Customer Records

1. **Navigate to the Customers Tab**
    - Go to Customers > Merge Customers.
2. **Search for Duplicates**
    - Use one of the following fields to search for duplicate records:
        - Email addresses
        - First name
        - Last name
        - Postcode

      Tip: Using email or postcode is often the most effective.
3. **Enter Search Criteria**
    - Input the details (e.g., email or postcode) and click Search.
4. **View Records**
    - Expand the list to review the duplicate records found.

Merging Customers

Prepare for the Merge

1. **Identify Records to Retain**
    - Review the records and decide which one to keep.
    - Retain the record with:
        - A member login.
        - The most recent last order.
2. **Remove Unwanted Records**
    - Tick the checkboxes next to records you do not wish to merge.
    - Click the red button labelled “Remove [X] customers from Merge List.”

Merge the Records

1. Select Records to Merge
    - Tick the checkboxes next to the duplicate customer records you want to merge.
    - Click the circle button in the Merge To column for the record you wish to retain.
2. **Edit Customer Information (Optional)**
    - Click the pencil icon to edit customer details if needed.
    - On the editing page:
        - Use the Green Arrows to transfer data from old records to the new one.
        - Update any missing or incorrect fields.
    - Click Update Customer to save changes.

    Note: Updating the customer is irreversible.

Merging Customers

3. Complete the Merge

- Return to the Merge Customers screen.
- Click Merge Customers to finalize the merge.

Confirmation

- After merging:
    - A confirmation popup will appear in the bottom-left corner, indicating the merge was successful.
    - You'll be redirected to the Merge Customer Search Screen.

This process ensures your database remains accurate and organized, eliminating duplicate records while preserving important data.

Printing Batches

Introduction to Batches

There are two types of batches used in Ticket Solve:

1. **Event Batches**: For tickets marked as "collect at box office" or "postage."
2. **Order Batches**: For specific ticket orders marked for "postage" or "order batches."

Printing Event Batches

Purpose:

Event batches are printed for tickets that need to be collected at the box office or unprinted orders for postage when within the postal guard. Typically, these are printed 24 hours before a show.

Steps:

1. **Navigate to Event Batches**
   - Go to Box Office > Print Tickets > Event Batches.
2. Set Batch Parameters
   - Specify the maximum number of orders per batch (recommended: 25).
   - Select the event date from the calendar.
   - Choose the specific event from the dropdown menu.
3. Additional Options
   - Include Entire Orders: Ensures all tickets from an order (even for different events) are included.
   - Include Print at Home: Includes unprinted orders with "print at home" fulfillment tags.

Printing Batches

4. **Preview the Batch**
    - Review the orders in the batch.
    - Remove any unwanted orders if necessary.

5. **Batch the Orders**
    - Click Batch to group the orders into a batch.

    Note: This action is irreversible.

6. **Print the Batch**
    - The batch will appear at the top of the print batches list.
    - Options:
        - Print the batch.
        - Download as a PDF.
        - Preview or customize printing.

    Once printed, orders are marked as fulfilled.

Printing Batches

Printing Order Batches

Purpose:

Order batches are used for ticket orders marked for "postage" or "order batches" during confirmation. It is recommended to print these daily, preferably in the morning, to ensure efficient fulfilment.

Steps:

1. **Navigate to Order Batches**
   - Go to Box Office > Print Tickets > Order Batches.
2. **Set Batch Parameters**
   - Specify the maximum number of orders in a batch (recommended: 25).
   - Choose the order type:
     - All Order Types (recommended for inclusivity).
     - Filter by Box Office, Online, or Phone Orders if needed.
   - Set the date range:
     - Use All Dates to include all orders.
     - Filter by specific order dates if necessary.
   - Use All Show Tags or filter by specific tags.
   - Use All Product Tags or filter by specific tags.
3. **Preview the Batch**
   - Review the list of orders.
   - Remove any unwanted orders if needed.
4. **Batch the Orders**
   - Click Batch to group the orders.

     Note: This action is irreversible.

Printing Batches

5. **Print the Batch**

    - The batch will appear at the top of the print batches list.
    - Options:
        - Print the batch.
        - Download as a PDF.
        - Preview or customize printing.

    Once printed, orders are marked as fulfilled.

Summary

- **Event Batches**: Printed close to the event date for box office collections or late postage.
- **Order Batches**: Printed daily for ticket orders marked for postage or batch processing.

Memberships

Selling Memberships or Benefit Products

Memberships and benefit products are sold in the same way as other products. However, the customer must have an online account to access their benefits.

Steps:

1. **Add Customer to the Cart**
    - Ensure the customer is added to the cart at the start of the process.
    - Confirm the customer has an online account for accessing benefits.
2. **Find and Add the Membership**
    - Navigate to the Box Office view.
    - Locate the desired benefit product.
    - Select the current customer option (do not choose the gift option if selling directly to the customer in the cart).
3. **Complete the Sale**
    - Proceed to payment options and confirm the order as usual.

Memberships

Finding Active and Expired Memberships

You can search for active or expired memberships, filter by benefit product, and email customers directly from Ticket Solve.

Steps:

1. **Go to the Membership Tab**
    - In the Box Office section, select the Memberships tab.
2. **Filter Memberships**
    - Use the dropdown menu to select a specific benefit product.
    - Filter memberships by:
        - Expiry date range.
        - All Active or All Expired memberships.
3. **Adjust Results**
    - Increase the Results per Page to up to 50 entries.
4. **Download or Email Members**
    - Download Report: Export results as a CSV file.
    - Bulk Email: Use the Email All Customers option to send default or custom messages with renewal links.
    - Individual Emails: Select specific customers via checkboxes for personalized communication.
5. **Reset and Search Again**
    - Use the Reset button to clear filters and perform a new search.

Memberships

Membership Sales Reports

1. **Benefit Sales Report**

Provides a breakdown of benefit purchases within a specific date range.

Steps:

- Navigate to Reports > Sales Reports.
- Select the Benefit Sales Report option.
- Choose the report format (CSV or HTML).
- Review details such as:
  - Purchase and expiration dates.
  - Renewal status of memberships.

2. **Donations Gift Aid List**

Lists donations with a specific line-item tag (e.g., Gift Aid).

Steps:

- Navigate to Reports > Sales Reports.
- Select the Donations Gift Aid List Report.
- Specify the desired date range.
- Apply the Gift Aid Tag to filter relevant donations.
- Generate the report.

Memberships

3. Custom Reports

Create custom reports to filter customers with active benefits or generate email lists.

Steps:

- Go to the Reports section.
- Apply filters to include customers with active benefits.
- Optionally, add a customer email list to the report.

Summary

- *Selling memberships requires adding customers to the cart and ensuring they have online accounts.*
- *Active and expired memberships can be filtered, reported, and managed directly from the Memberships tab.*
- *Detailed reports, including sales, renewals, and donation data, can be generated for better insights into membership activity.*

Events Dashboard

Overview

The Events Dashboard provides a clear and organized view of upcoming events, enabling efficient management of ticket sales, reservations, and customer interactions.

Accessing the Events Dashboard

- Navigate to the Box Office icon.
- Select Events Dashboard.

Exploring the Events Calendar

- Current Date: Displayed in pink for easy identification.
- View Options: Use the dropdown menu at the top-right corner to switch between:
    - Day View
    - Week View
    - Month View

Accessing Event Details

- Click on a specific show in the calendar to view the Event Overview.

  Alternatively, go to the Box Office page, click the Calendar icon, and select View Tickets.

Events Dashboard

Event Overview

The Event Overview provides a summary of the event's performance, including:

- Tickets: Sold, reserved, and available.
- Financials: Total paid, total amount due, tax, and discounted tickets.
- Allocation Breakdown.

Reports and Print Options

From the Event Overview, you can generate and download reports in CSV, PDF, or browser view formats.

Events Dashboard

Available Reports

1. **Event Summary:**
    - Detailed breakdown of ticket sales, payment types, add-ons, fulfilment options, and booking fees.
2. **External Event Summary:**
    - A concise version of the accounts detail report for external users.
3. **Customer List:**
    - Full details of customers who booked, including amended orders.
4. **Customer List Short:**
    - Includes order numbers, names, comments, add-ons, and ticket details.
5. **Seat List:**
    - Displays customer names, seat rows, and seat numbers.
6. **Attendance List:**
    - Lists attendees who scanned their tickets at the event.
7. **Show Seat Map:**
    - Visual map of booked seats for the event.
8. **Email Customers:**
    - Allows mass emailing to all customers who booked tickets for the event.
9. **Ticket Summary:**
    - Breakdown of sold tickets.

Events Dashboard

10. **Payment Summary:**
    - Breakdown of payment types used.
11. **Purchase Behaviour:**
    - Analysis of when tickets were booked (can be exported as CSV or charts).

Additional Dashboard Features

1. **Orders:**
   - Displays orders for the selected event.
   - Similar functionality to the Search Orders tab.
2. **Reservations:**
   - Lists reserved orders with details like customer name, expiry date, and the person who reserved the order.
   - Dropdown options: View Order or Amend Order.
3. **Amendments:**
   - Displays any refunds or exchanges processed for the event.
4. **Carts:**
   - Shows open carts containing tickets for the specific event.
5. **Payments:**
   - Displays confirmed payments for the event.
   - Use the Refresh Arrows to update the list or the CSV Button to download a report.

Events Dashboard

Managing Specific Orders

1. **Viewing Orders:**
    - Click on an order to open the summary screen.
    - Select View Order to see full details.
2. **Order Actions:**
    - Amend: Make changes to the order.
    - Print or Resend: Print tickets or resend confirmation emails.
    - Invoice: Show as a Word document.
    - Fulfil/Exclude: Mark as fulfilled or exclude it from a batch.

Customer and Order History

1. **Customer Tab:**
    - Displays customer information, including:
        - Spending history
        - Permissions
        - Memberships
        - Order history
        - Comments
        - MailChimp data
2. **Order History Tab:**
    - Shows the original order and any amendments.
3. **Comments Tab:**
    - Add comments to the order as needed.

Summary

The Events Dashboard provides a centralised view of events, enabling efficient management of ticket sales, reservations, payments, and customer interactions. With robust reporting and order management features, it ensures streamlined event operations.