

Sales Guide

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Contents



- Sales Basics** 13
- Sales Overview 13
- Understand Patrons and Constituents 16
- Patron Search 17
- Patron Search Screen 19
- Add Patrons 20
- Edit Patrons 20
- Edit Personal Information for Patrons 20
- Edit Personal Information Screen 22
- Edit Primary Contact Information for Patrons 22
- Edit Contact Information Screen 24
- Membership Search 25
- Membership Search Screen 26

- Daily Tasks and the Create Deposits Process** 28
- Manually Open Cash Drawers 29
- Count Initial Cash 29
- Close Drawer 30
- Configure Close Drawer Policy 33
- Review Closed Drawers 33
- Submit Closed Drawer 35
- Approve Closed Drawers 35
- Allocate Cash Over/Short 37
- Edit Sales Method Allocation 37
- Edit Submitted Closed Drawers 38
- Approved Closed Drawers 39
- Create Deposits Process 39
 - Deposits Workflow 39
- Configure Deposit Templates 40
- Run Deposit Process 42
 - Post Status for Deposits 42
 - Unlinking Payments or from Deposits 42
 - Run Deposits Automatically 43

View Deposit Process Information	44
Schedule a Deposit Process Job	45
Scan Tickets	47
Scan Tickets from Sales	48
Scan Tickets from Daily Sales Page	48
Advance Sales	50
Advance Sales Process Workflow	50
Step 1: Select a Patron	51
Step 2: Create the Order	51
Step 3: Complete the Order	53
Cancel Orders	54
Complete Orders	54
Confirm Delivery Information	54
Mark an Order Tax Exempt	55
Edit Items in an Order	56
Remove Items From an Order	57
Add Payments	57
Defer Payment	59
Daily Sales	60
Daily Sales Process	60
Daily Sales Keypad	61
Search for Patrons	61
Edit Order	62
Accept Payments	62
Remove Sales Items	63
Cancel Orders	63
Capture Marketing Information	63
Manage Sales Items	65
Ticket Sales	66
Sell Tickets for a Daily Admission Program	66
Sell Tickets for a Scheduled or Pre-registered Program	68
Add Tickets for Preregistered Program Screen	73
Sell Combination Tickets	73
Membership Sales	75

Sell New Memberships	76
Sell a Membership Screen	78
Renew, Upgrade, Rejoin, or Activate Memberships in a Sales Order	81
Sell Gift Memberships	81
Sell Membership Add-ons	82
Sell Mid-term Membership Upgrades	82
Apply Cost of Previously Purchased Tickets to Memberships	84
Accept Donations	85
Register for Fundraising Events	86
Sell Merchandise	88
Inventory Items Search	90
Apply Order Discounts and Promotions	90
Common Discount Scenarios	90
Patron Purchases a Membership and Receives a Discount	91
Patron Receives Two Discounts on One Order	91
Patron Provides Two Promotion Codes	91
Apply Discounts and Promotions	91
Discounts and Promotions Screen	94
Manage Order Discounts and Promotions	94
View All Discounts and Promotions Applied to an Advance Sales Order	95
Remove Discounts and Promotions from an Order	95
Manage Discounts and Promotions Screen	95
Group Sales	97
Group Sales Setup	101
Group Sales Setup Checklist	102
Understand Facility Rentals	104
Prepare for Facility Rentals	104
Configure Contract Templates	105
Preconfigured Contract Templates	105
Group Sales Basic Contract	106
Group Sales Contract with Itinerary	108
Group Sales Contract with Itinerary and Resources	110
Facility Contract	112
Edit Preconfigured Templates	114
New Contract Templates	115

Contract Template Data Fields	118
Configure Reservation Defaults	126
Configure Reservation Deposit Defaults	126
Configure Security Deposit Defaults	127
Configure Contract Defaults	129
Configure Final Count Defaults	130
Configure Order Balance Payment Defaults	131
Configure Quick Itinerary Defaults	132
Set Capacity Constraints and Resource Requirements	133
Configure Flat Rate Pricing	135
Change the Default Pricing Structure for Group Sales	136
Add Rate Scales	137
Limit the Programs, Fees, and Resources Included in a Rate Scale	139
Configure Default Flat Rate Applications	141
Edit Rate Scales	143
Delete Rate Scales	143
Configure Facility Prices	143
Build Group Itinerary Tracks	144
Add Group Itinerary Tracks	145
Schedule Group Itinerary Tracks	145
Schedule Daily Admission Programs for a Group Track	146
Schedule Program Events for a Group Track	148
Schedule Custom Items for a Group Track	150
Schedule Group Itinerary Tracks	152
Manage Group Reservations	154
View the Group Reservation Calendar	154
View Completed Group Reservations	155
View Canceled Group Reservations	155
Display In-Progress Group Reservations by Status	155
View Only Past Due Group Reservations	156
Display Capacity Availability	156
View the Group Reservation List	156
Add Group Reservations	157
Add a Contact Relationship	163
Search for Reservations	164
Manage Group Order Contracts	165

Create Contracts	166
View Contracts	167
Edit Contracts	167
Replace Contracts	168
Print Contracts	169
Send Contracts as Email Attachments	169
Mark Contracts as Sent or Not Sent	170
Mark Contracts as Received or Not Received	171
Confirm Final Count for a Group Order	172
Notify Group of Balance Due	173
Edit Group Reservations	175
Edit Reservation Name	175
Edit Group Reservation Times	175
Change Group Reservation Status	176
Copy Group Reservations	177
Change Group Visit Dates	180
Manage Flat Rate Pricing	181
Change Rate Scales for Group Reservations	181
Configure Flat Rate Applications	182
Edit Contact Information for Group Reservations	183
View Group Reservation Order History	184
Add Important Notes	185
Delete Group Reservations	185
Cancel Group Reservations	185
Configure Group Itineraries	186
Add Group Itineraries	187
Schedule Group Itineraries	187
Schedule Daily Admission Programs for a Group Itinerary	188
Schedule Program Events for a Group Itinerary	191
Schedule Custom Items for a Group Itinerary	194
Schedule Resources for a Group Itinerary	197
Assign People to Fill Staffing Resource Positions for Itineraries and Itinerary Items	199
Clear a Group Itinerary	202
Copy a Group Itinerary	203
Load a Track for a Group Itinerary	204
Resolve Scheduling Conflicts for a Group Itinerary	205

Save a Group Itinerary as a Track	213
Edit Group Itineraries	214
Delete Group Itineraries	215
Configure Group Arrival Information	215
Manage Group Reservation Documentation	216
Notes	216
Add Notes	216
Add a Note Screen	217
Edit Notes	217
Delete Notes	217
Media Links	218
Add Media Links	218
Add a Media Link Screen	218
Edit Media Links	218
Delete Media Links	219
Attachments	219
Add Attachments	219
Add an Attachment Screen	219
Edit Attachments	220
Delete Attachments	220
Open Attachment Files	220
Notifications	220
Add Notifications to Specific Records	221
Edit Notifications for Specific Records	223
Delete Notifications from Specific Records	223
Manage Group Sales Discounts and Promotions	223
Apply Group Sales Discounts and Promotions	224
View All Discounts and Promotions Applied to a Reservation	225
Remove Discounts and Promotions from a Reservation	225
Process Group Payments	226
Print or Reprint Group Reservation Sales Documents	228
Refunds for Group Sales Reservations	229
Process Group Check In	230
View the Groups Scheduled to Check In	231
View and Print Group Itinerary Reports	231
Check In Groups	231

Process Group Check Out	234
View the Groups Scheduled to Check Out	234
Refund Security Deposits	235
Keep Overage for Group Reservations	237
Manage Orders	238
Search for Orders	240
Order Search Screen	241
Patron View	243
View Sales Orders for a Constituent	243
View Completed Orders	243
Change Patron on Order	244
View Order Details	244
View Tickets Purchased	245
View Printed or Emailed Sales Documents	245
View Order Payments	245
View Order Documentation	245
View GL Distributions	245
Adjust Revenue GL Distribution Screen	246
Manage Completed Order Documentation	247
Notes	248
Add Notes	248
Add a Note Screen	248
Edit Notes	248
Delete Notes	249
Media Links	249
Add Media Links	249
Add a Media Link Screen	249
Edit Media Links	250
Delete Media Links	250
Attachments	250
Add Attachments	250
Add an Attachment Screen	251
Edit Attachments	251
Delete Attachments	251
Print Orders, Tickets, and Sales Documents	252

Print or Reprint Orders	252
Print or Reprint Tickets	253
Print or Reprint Sales Documents	254
Common Print Issues	254
Pick Up Tickets	255
Complete Unpaid Orders and Print Tickets and Sales Documents	256
Print Tickets and Sales Documents for Paid Orders	256
Group Check In	257
Preregistered Program Check In	260
Manage Registrants for Preregistered Programs	261
Edit Registrants and Preferences	261
View and Print a Preregistered Event Roster	262
Mark Registrants as Canceled	263
Mark Registrants as Attended or Not Attended	263
Unresolved Online Sales Orders	264
Pending Orders	265
Scan Tickets	265
Scan Tickets from Sales	266
Scan Tickets from Daily Sales Page	266
Batch Print Tickets	267
View Printed Ticket Batches	268
Reschedule Tickets	269
Find Tickets Available to Reschedule	269
Find Available Events	270
Email Receipts for Sales Orders	270
Email Tickets	271
Resend Acknowledgment Emails	272
Refunds	273
Refund Transactions	274
Find Items to Refund Screen	277
Refunds page	278
Back Office Refunds and the Close Drawer and Deposits	279
Search for Refunds	280
Refund Search Screen	280
Refund Record	281

Retry Credit Card Refunds	282
Link or Unlink Deposits to Payments	282
Edit Refund Comments	283
Edit the Refund Reason	283
Recent Refunds	283
Refunds for Group Sales Reservations	285
Sales Reports	287
Adjustable Discount Report	288
Average Hourly Sales Report	289
Daily Admission Report	291
Discount Report	293
Grouped by Discount	294
Grouped by User	295
Grouped by Program	296
Grouped by Membership Level	297
Grouped by Merchandise	298
Event Attendance Report	298
Fee Report	299
Group Sales Revenue Report	300
Itinerary Report	301
Location Availability Report	302
Marketing Survey Report	303
My Sales By Payment Method	304
Orders With Balance Due Report	305
Preregistered Program Roster	306
Program Revenue Report	307
Sales by Date Report	308
Sales By Membership Report	309
Sales By Payment Method Report	311
Sales By Price Type Report	312
Sales By Program Report	314
Sales Comparison Report	315
Deposit Summary Report	316
Close Drawer Report	317
Sales Report	319

Scheduled Event Ticket Detail Report	320
Tax Report	321
Ticket Availability Report	322
Zip code Report	323
Sales Dashboards	325
Access the Sales Dashboard Page	325
Main Dashboard	325
Active Memberships by Program Dashboard	326
Daily Admissions Dashboard	328
Memberships Sold Dashboard	330
Ticket Sales Dashboard	331

Sales Basics

Sales Overview	13
Understand Patrons and Constituents	16
Patron Search	17
Patron Search Screen	19
Add Patrons	20
Edit Patrons	20
Edit Personal Information for Patrons	20
Edit Personal Information Screen	22
Edit Primary Contact Information for Patrons	22
Edit Contact Information Screen	24
Membership Search	25
Membership Search Screen	26

Before you get started, there are some basic things you should know, including how to search for a patron to associate with an order and how to edit the primary contact information for a patron during the order process.

Sales Overview

Ticket sellers, group sales coordinators, and guest services managers will access *Sales* on a daily basis to perform tasks related to their specific role within your organization. The tasks and items displayed when a user accesses *Sales* will vary depending on the system role of the person logged in. To access *Sales*, on the navigation bar click **Sales**.

In the **Daily tasks** section, a ticket seller begins their sales shift by counting the cash drawer. Next, they click **Advance sales** or **Daily sales** to sell tickets and memberships. Typically **Advance sales** is used to process phone orders while **Daily sales** is used to process walk-up purchases. A group sales coordinator clicks **Group sales** to book group reservations, build itineraries, create group contracts, and perform all other tasks related to group visits. Additionally, in the **Daily tasks** section, users can open the cash drawer manually and perform close day processes like reconciling sales.

In the **Manage orders** section, users can search for previous orders and refunds, process refunds, check-in groups that arrive on the day of their visit, complete “pay on arrival” orders, and print tickets for paid but unprinted orders. You can also access the organization calendar and sales dashboard from *Sales*.

Each item and task available on the Sales page is described below. Remember, the items and tasks you see on the Sales page when you log in will depend on your system role.

Advance sales

Sell tickets to scheduled events or general admission programs in advance. You can also sell new memberships, process a gift of membership, and renew or rejoin memberships. Additionally, you can accept donations during an advance sale transaction and process registrations for fundraising events. This screen is typically used to process phone sales and is designed for non-walk-up situations. For more information, see [Advance Sales on page 50](#).

Group sales

Configure group sales defaults, book group reservations, build itineraries and itinerary tracks, create group contracts, and perform all other tasks related to group visits. For more information, see [Group Sales on page 97](#).

Count initial cash

If your organization's workflow requires that you record the amount of money in your cash drawer at the beginning of each shift, after you log in, you can count your cash drawer and enter a starting balance. When you reconcile your sales, this amount automatically appears in the **Starting balance** field on the Reconcile sales screen. For more information, see [Count Initial Cash on page 29](#).

Daily sales

Sell tickets to scheduled events or general admission programs. You can also sell new memberships, process a gift membership, and renew or rejoin memberships. Additionally, you can accept donations and apply discounts. The Daily Sales screen is designed for efficiently processing walk-up sales and is configurable. You can create up to 25 daily sales buttons to sell specific daily admission and scheduled program tickets, memberships, donations, and apply discounts. For more information, see [Daily Sales on page 60](#).

Close drawer

At the end of a shift, you must count the cash, coins, and checks in your drawer and enter the sum amount on the Close drawer screen. When you complete the close drawer process, you submit a Close Drawer report to close your cash drawer. For more information, see [Close Drawer on page 30](#).

Approve closed drawers

A supervisor or other user with the proper security rights approves closed drawers submitted by ticket sellers and determines which payments to include in the sales order deposit process. For more information, see [Approve Closed Drawers on page 35](#).

No sale/open cash drawer

If needed, a user with the required system role can manually open a cash drawer when no sale or refund has taken place. To aid in fraud prevention, you must provide a reason when opening a cash drawer manually. For more information, see [Manually Open Cash Drawers on page 29](#).

Create deposits

A supervisor creates sales deposits for both non-online and online sales. For non-online sales, which includes advance sales, daily sales, and group sales transactions, there is a close drawer process that must take place prior to creating deposits. During this process, a ticket seller calculates the cash,

checks, and credit card receipts in their drawer at the end of a shift and submits the close drawer for approval. A supervisor then approves the close drawer and creates a sales deposit for the payments. A supervisor uses this to manually create deposits for online transactions.

Because online sales do not involve cash or checks and there are no receipts, there is nothing to reconcile. A supervisor simply creates a deposit for the sales processed online.

All eligible payments made through *Sales, Treasury* (miscellaneous payments), and the back office are added to the deposit process. Examples of back office revenue include payments made as part of a batch or from a revenue record outside of *Sales* and *Treasury*. For more information, see [Create Deposits Process on page 39](#).

Note: You can also access the Deposits page from *Treasury*. On the *Treasury* page, under **Processing**, click **Review Deposits**.

Order search

If a patron has questions about an order, you can search for and access the completed order record to view transaction details. These details include a list of all items purchased or refunded, all payments received or refunded, the order and post statuses, as well as any balance that is due on the order. For more information, see [Search for Orders on page 240](#).

Group check in

When a group arrives at your organization on the day of their visit, they must be checked in. During this process, you verify the number of visitors in the group and update the reservation to reflect the actual attendees. You may need to add or remove visitors from the reservation and possibly add new price types. For more information, see [Group Check In on page 257](#).

Group check out

It is common for a security deposit to be required for group visits or facility rentals. If a security deposit is collected from a group when they visit your organization, to fully check them out afterward, you must refund or withhold the security deposit. For more information, see [Process Group Check Out on page 234](#).

Preregistered program check in

The Preregistered Program Check In page provides a central location to see the preregistered programs scheduled for the current day and to check in program attendees as they arrive. Check in is not a required process, it simply provides a way for your organization to track attendance for your preregistered program events. For more information, see [Preregistered Program Check In on page 260](#).

Refunds

Process order refunds, membership refunds, or event registration refunds. An order refund is the most common as it allows you to refund all or specific items in an order, including tickets, memberships, event registrations, taxes, and fees. For more information, see [Refund Transactions on page 274](#).

Refund search

If a patron has questions about a refund, you can search for and access the related refund record to view transaction details. Refund records provide detailed information about each refund transaction processed, including the total amount refunded and transaction date, the person who processed the refund, the reason for the refund, and whether the transaction has been reconciled. Additionally, the record contains details about the credits, refund payment methods and GL distributions. For more information, see [Search for Refunds on page 280](#).

Pick up tickets

When patrons arrive at your organization to pick up tickets that have not yet been printed or are part of a “pay on arrival” order, click **Pick Up Tickets** to quickly locate the orders, process payments, and print tickets. For more information, see [Pick Up Tickets on page 255](#).

Unresolved online sales orders

For online sales, the program assigns a status of “Unresolved” to sales orders after website users make payments. The program uses this temporary status to create records for online sales orders even if errors prevent it from processing the orders. On the Unresolved Online Sales Orders page, you can view a list of all unresolved sales orders and access each record to resolve issues or refund payments. For more information, see [Unresolved Online Sales Orders on page 264](#).

Organization calendar

With the organization calendar, you can view scheduled items and activities related to your organization and community, such as to help plan and coordinate schedules. In addition to calendar items such as holidays or community events, you can add and manage special events and appeal mailings directly from the calendar, such as to quickly plan for a future time period. You can also view scheduled program events and group reservations.

Sales dashboard

Sales dashboards are an effective way to view key sales performance data and are designed to communicate information at a glance. When you access the Sales Dashboard page you can select from multiple dashboards. Each dashboard provides different sales data that is delivered in a visual way that is easy to understand. For example, the main dashboard provides total ticket sales, number of admission tickets sold, number of memberships sold today, and total memberships sold. Additionally, you can access more specific dashboards that provide a closer look at ticket and membership sales data. For more information, see [Sales Dashboards on page 325](#).

Note: If you are logged in with the appropriate system role, you can also run sales reports and create deposits from *Sales*. For more information about reports, see [Sales Reports on page 287](#). For more information about creating deposits, see [Create Deposits Process on page 39](#).

Understand Patrons and Constituents

When processing ticket sales, group sales, or performing other tasks related to ticketing, you will see references to “Patrons” and “Patron records.” For example, when you begin the sales process, you can “Add a new patron” or search for an existing patron to associate with the order. If you add a patron, you are adding a new constituent record to the system. If you search for an existing patron, you are searching for an existing constituent record.

After a constituent purchases a ticket to a program or general admission event, a constituency of "Patron" is automatically added to their constituent record. Constituencies define the affiliations your constituents have with your organization. A constituent can have multiple constituencies, and these relationships can start, end and overlap. For example, a constituent may first become a donor in your database and remain a donor for an undetermined length of time. If they buy a ticket to program event or general admission event, they are a patron. The constituent may later become a volunteer for your organization, but for only six months. You can use constituencies to define these relationships and group similar constituents in queries, mailings, and reports.

Note: For more information about constituent records, see the *Constituent Guide*.

Patron Search

When you begin the Advance Sales or Daily Sales process, you can add a patron or search for an existing patron to associate with the order. Before you add a patron, to avoid duplicates, you should first search your database to make sure the patron does not already have a constituent record. After you add a record, you can use the search screen at any time to find the constituent you need to access.

When you search for a constituent record, you can make the search broad or specific with the criteria you select. With a large database, you should be selective and enter detailed information to locate the record you need. For example, you can use name and address fields. For searches that return more than 100 constituents, only the first 100 appear in the results.

➤ Search for a patron

1. During the Advance Sales or Daily Sales process, in the **Patron** field click the magnifying glass. The Patron Search screen appears.

Quick search: Search Clear

Advanced search:

Last name: Address:

First name: City:

Membership ID: State:

Phone number: ZIP/Postal code:

Individuals Organizations Groups/Households

Include inactive Include Deceased

Results Add

Lookup ID	Name	Membership	Membership ID	Expiration date	Name on card	Address	Phone number

Select Cancel

- In the **Quick search** field, you can search for a specific constituent by first name, last name, alias, phone number, membership card number, and membership lookup ID.

Note: You can also swipe the patron's membership card if available for your organization. After you swipe the card, the patron's contact information, memberships, and active constituencies are automatically loaded into the order.

- Under **Advanced search** you can enter more search criteria to narrow your results.
- Decide how to filter constituent records for this search and enter your criteria. The search process is not case-sensitive, so you can enter Smith, smith, or SMITH and get the same results.

You can choose to search for individuals, organizations, and groups/households. By default, **Groups/Households** is not selected. If you include groups and households in your search, it may take longer to return results. You can also choose to include constituents marked as inactive or deceased in your search results. For more information, see [Patron Search Screen on page 19](#).

You can enter data in all fields or none, depending on how broad or narrow you want your search to be. Depending on your criteria, the program may find one constituent or many. For information about the fields on the search screen, see [Patron Search Screen on page 19](#).

Note: In the criteria fields, you can enter "wildcard" characters to take the place of parts of the search phrase. Use the asterisk (*) or percent sign (%) to take the place of a group of characters and the question mark (?) or underscore (_) to take the place of an individual character. For example, to

locate all constituents with a last name ending with the letters "son", you can enter *son or %son in the name field, or for the last name Smith or Smyth, you can enter Sm?th or Sm_th.

5. Click **Search**. The program searches the database and displays all constituents who meet your search criteria.
6. Select the constituent record to associate with the order and click **Select**. You return to the order page and the constituent name and contact information are displayed.

Note: You can add a patron from the search screen. On the action bar, click **Add**. For more information about how to add a constituent, see [Add Patrons on page 20](#).

Patron Search Screen

The table below explains the items on the Patron Search screen. For information about how to access this screen, see [Patron Search on page 17](#).

Screen Item	Description
Quick search	Enter a constituent's first name, last name, alias, phone number, membership card number, or membership lookup ID.
First name and Last name	<p>Enter a name to search for. You can enter a partial name. For example, enter "Sm" to find all names that start with "Sm." Also, the search process is not case-sensitive, so "Smith," "smith," and "SMITH" all return the same results.</p> <p>If you enter a full name in the Name field, the program searches for patrons with this first and last name. If you enter a single name, the program searches for only last names that match. For example, if you enter "Robert Hernandez," only patrons with this full name appear in the search results. If you enter "Hernandez," all patrons with this last name appear in the results. If you enter "Robert" in the Name field, the search results include patrons with a last name that contains "Robert," such as Robert, Roberts, or Robertson. The results do not include patrons with "Robert" as a first name.</p>
Membership ID	Enter the constituent's membership ID. You can enter a partial ID. For example, if you enter "123," the search returns all membership IDs that start with "123" appear.
Phone number	Enter the constituent's phone number.
Address	Enter the street address, such as 7930 Baker Street. You can enter a partial address. For example, enter "79" to find all street addresses that start with "79." Use wildcard characters to search for street names only. For example, "*Baker Street" and "%Baker Street" find all addresses that include "Baker Street."
City	Enter the city or town.
State	Select the state.

Screen Item	Description
ZIP/Postal code	Enter the Zip code.
Individuals, Organizations, and Groups/Households	To include individuals, organizations, and groups/households in your search, select the appropriate checkbox. By default, Groups/Households is not selected. If you search for groups and households, the search may take longer.
Include inactive and Include deceased	To include constituents marked as inactive or deceased in your search results, select the appropriate checkbox. By default, neither checkbox is selected. If you include inactive and deceased constituents in your search, it may take longer to return results.

Add Patrons

During the sales process, you may need to add a constituent record to associate with an order. Individual records maintain information on people in your database and organization records track important data pertaining to the companies, businesses, and foundations in your database. To avoid duplication, we recommend searching for an existing constituent record before you add a new one.

When you associate a constituent with a ticket order, a “Patron” constituency is added to the individual or organization’s constituent record. However, if the order does not include tickets, the program does not apply the “Patron” constituency to the constituent record.

Note: For more information about how to add a constituent, see the *Constituent Guide*.

Edit Patrons

During the Advance Sales process, you can select an existing constituent record to associate with an order. You can load an individual or organization record, as well as a household or group record. After the record is loaded, you may need to update patron information.

The type of information you edit depends on the type of constituent record loaded. For example, if you load an individual and click the Edit button in the **Patron** section next to the magnifying glass, you can edit the individual’s personal information. If you load an organization record, you can edit organization details.

Note: For more information about how to edit constituent information, see the *Constituent Guide*.

Edit Personal Information for Patrons

During the Advance Sales process, you may need to update a patron’s personal information. For example, if the patron’s marital status has changed or has a nickname by which they would like to be referred, you should update their personal information. On the Edit personal information screen, you can update the patron’s name, marital status, birth date, and other information. Any changes you make to the patron’s name during a sale is reflected on the order and full constituent record.

Note: From the order page, you can efficiently edit a patron's personal information. For more information about how to edit name and other personal information, see the *Constituent Guide*.

> Edit personal information for a patron

1. After you associate a patron with an Advance Sales order, the patron's name and primary contact information is displayed.
2. To edit the patron's personal information, under **Patron**, click the pencil next to the magnifying glass. The Edit personal information screen appears. For more information about the items on this screen, see [Edit Personal Information Screen on page 22](#).

The screenshot shows a web form titled "Edit personal information" for a patron named Mark Adamson Daniel. The form includes the following fields and options:

- Last name:** Adamson
- First name:** Mark
- Middle name:** Daniel
- Maiden name:** (empty)
- Nickname:** (empty)
- Marital status:** Divorced (dropdown menu)
- Title:** Mr. (dropdown menu)
- Suffix:** , III (dropdown menu)
- Job title:** (empty)
- Image:** A placeholder image of a person, with "Choose file" and "Clear file" links next to it.
- Gender:** Male (dropdown menu)
- Birth date:** 9/23/1954 (calendar icon)
- Website:** (empty)
- Gives anonymously

At the bottom right of the form are "Save" and "Cancel" buttons. A help icon is visible at the bottom left.

3. Edit the information as necessary. If the constituent requests to donate anonymously, select **Gives anonymously**.
4. To add an image for the constituent:
 - a. In the **Image** field, click **Choose file**. The Open screen appears.
 - b. Browse to and select the image file to use with the constituent.
 - c. Click **Open**. You return to the Edit personal information screen. In the **Image** field, the selected image appears.
To remove the image selected for a constituent, click **Clear file**.
5. Click **Save**. You return to the sales order and the updated personal information is displayed. The changes you make here are also saved on the patron's constituent record.

Edit Personal Information Screen

The table below explains the items on the Edit personal information screen. For information about how to access this screen, see [Edit Personal Information for Patrons on page 20](#).

Screen Item	Description
Last name, First name, Middle name	Enter the name of the individual constituent exactly as it should appear throughout your database such as on pages and reports.
Maiden name	Enter a maiden name for the individual as necessary. On the constituent record, the maiden name entered appears as an alias on the Names tab. When you search for individual constituents, you can select to include maiden names in the search criteria.
Nickname	Enter a nickname for the individual as necessary. When you search for individual constituents, you can select to include nicknames in the search criteria.
Marital status	Select whether the individual constituent is single, married, or divorced.
Title	Select a title for the individual such as Mr., Mrs., or Ms.
Suffix	Select a suffix for the individual such as Sr. or M.D.
Image	This field displays an image associated with the constituent, such as a picture of the individual. To add an image for the constituent, click Choose file . The Open screen appears so you can browse to and select the image file to use. To remove an image associated with the constituent, click Clear file .
Gender	Select whether the individual is a male or female. If you are unsure of the individual's gender, select "Unknown."
Birth date and Age	Enter the individual's date of birth, such as 10/10/1941. If you are unsure of the exact birth date, you can enter a "fuzzy" date, such as the month and year or the year only. If the date contains a year, the constituent's age is calculated and displayed.
Website	If the constituent has a personal website or weblog, enter the web address. On the constituent record, the web address appears as a link to the website.
Gives anonymously	If the constituent requests to donate anonymously, mark this checkbox.

Edit Primary Contact Information for Patrons

During the Advance Sales process, you may need to update a patron's primary contact information. For example, if the patron recently moved or switched cell phone providers, you should update their contact information. On the Edit contact information screen, you can update the primary address,

phone, and email for the patron. Any changes you make to the patron's name and primary contact information during a sale are reflected on the full constituent record.

Note: From the order page, you can efficiently edit a patron's primary contact information. For more information about how to edit alternative addresses, phone numbers, and email addresses, see the *Constituent Guide*.

➤ Edit primary contact information for a patron

1. After you associate a patron with an Advance Sales order, the patron's primary contact information is displayed.
2. To edit this information, under **Contact information**, click **Edit**. The Edit contact information screen appears.

Edit contact information

Primary address

Address type: Home

Country: United States

Address: 410 17th St

City: Denver

State: CO

ZIP: 80202-4402

Primary phone number

Phone type: Home

Phone number: (303) 997-3301

Primary email address

Email type: Email

Email address: rhernandez@net.com

Save Cancel

3. In the **Address type** field, select the type to use for the constituent's primary address, such as Business or Home.
4. In the **Country** field, select the country for the constituent's primary address. The country you select determines the fields that appear on the screen. For example, if you select "United Kingdom" instead of "United States", the **County** and **Postcode** fields appear instead of **State** and **ZIP**.
5. If the address, city, state, or Zip code of the constituent's primary address has changed, edit the fields as needed.
6. In the **Phone type** field, select the type of phone number to use for the constituent's primary phone, such as Cell Phone or Home.
7. In the **Phone number** field, enter the primary phone number for the constituent. If phone formatting is enabled, the program automatically formats the phone number. For seven digits, the format is xxx-xxxx. For 10 digits, the format is (xxx) xxx-xxxx. For 11 digits, the format is x (xxx) xxx-xxxx. For a number with an extension, a space appears between the formatted phone

number and the extension. You can enter any character to identify the extension. For example, if you enter 8885551212x2823, the phone number and extension appear as (888) 555-1212 x2823. If phone formatting is disabled, enter the phone number exactly how you want it to appear in the program.

8. In the **Email type** field, select the type of email to use for the constituent's primary email address, such as Business or Home.
9. In the **Email** field, enter the email address for the constituent.
10. Click **Save**. You return to the sales order and the updated primary contact information is displayed. The changes you make here are also saved on the patron's constituent record.

Edit Contact Information Screen

The table below explains the items on the Edit contact information screen. For information about how to access this screen, see [Edit Primary Contact Information for Patrons on page 22](#).

Screen Description Item

Address type	Select the type of address for the constituent, such as Business or Home.
Country	Select the country for the constituent's address. The country you select determines the fields that appear on the screen. For example, if you select "United Kingdom" instead of "United States", the County and Postcode fields appear instead of State and ZIP .
Address	Enter the street address or post office box for the constituent.
City	Enter the city or town for the constituent address.
State	Select the state for the constituent address.
ZIP	Enter the Zip code for the constituent address.
Phone type	Select the type of phone number for the constituent, such as Cell Phone or Home.

Screen Description Item

Phone number	<p>Enter the phone number for the constituent.</p> <p>If phone formatting is enabled, the program automatically formats the phone number. For seven digits, the format is xxx-xxxx. For 10 digits, the format is (xxx) xxx-xxxx. For 11 digits, the format is x (xxx) xxx-xxxx. For a number with an extension, a space appears between the formatted phone number and the extension. You can enter any character to identify the extension. For example, if you enter 8885551212x2823, the phone number and extension appear as (888) 555-1212 x2823.</p> <p>If phone formatting is disabled, enter the phone number exactly how you want it to appear in the program.</p>
Email type	Select the type of email address for the constituent, such as Business or Home.
Email address	Enter the email address for the constituent.

Membership Search

For some sales processes, including renew or rejoin memberships, you will need to quickly locate a membership. This is accomplished through the Membership Search screen. When you search for a membership, you can make the search broad or specific, depending on the criteria you select. With a large database, you should be selective and enter detailed information to get the records you need.

➤ Search for a membership

1. During some sales processes you will need to search for a specific membership. For example, when you process a membership renewal, the Membership Search screen appears.
2. In the top frame, decide how to filter records for this search and enter your criteria. You can also choose to match all criteria exactly, search for nickname and aliases, and include fuzzy search on names to return similar sounding names. The search process is not case-sensitive, so you can enter Smith, smith, or SMITH and get the same results.
3. To show all search options, click the down arrow beside **Show advanced search options**.
4. Under **Advanced search options**, you can choose to search for individuals, organizations, and groups/households. By default, **Groups/Households** is not marked. If you include groups and households in your search, it may take longer to return results. For more information, see [Membership Search Screen on page 26](#).

You can enter data in all fields or none, depending on how broad or narrow you want your search to be. Depending on your criteria, the program may find one membership or many. For information about the fields on the search screen, see [Membership Search Screen on page 26](#).

Note: In the criteria fields, you can enter “wildcard” characters to take the place of parts of the search phrase. Use the asterisk (*) or percent sign (%) to take the place of a group of characters and the

question mark (?) or underscore (_) to take the place of an individual character. For example, to locate all constituents with a last name ending with the letters "son", you can enter *son or %son in the name field, or for the last name Smith or Smyth, you can enter Sm?th or Sm_th.

5. Click **Search**. The program searches the database and displays all constituents who meet your membership search criteria. The results grid displays the membership ID and program.

Membership Search Screen

The table below explains the items on the Membership Search screen. For information about how to access this screen, see [Membership Search on page 25](#).

Screen Item	Description
Name	Enter name information on which to base your search. You can enter a partial name or individual letters in this field. For example, if you enter "Sm", all names beginning with the letters "Sm" appear. Also, the search process is not case-sensitive, so you can enter Smith, smith, and SMITH and get the same results.
Membership ID	Enter the entire or partial membership ID you are searching for. You can enter the entire ID or the beginning digits. For example, if you enter "1", all membership IDs beginning with the number 1 appear. If you enter "123", IDs beginning with these digits appear.
Phone Number	Enter the phone number of the constituent whose membership you are searching for. You can enter the entire number with area code or just the area code.
Address	Enter the address lines, such as 7930 Baker Street. You can search by entering the beginning street numbers. For example, you can enter "79" to bring up all street addresses beginning with 79. You can use a wildcard character to search only by street name; *Baker Street or %Baker Street brings up all addresses containing Baker Street.
City	Enter the city or town. You can enter the entire city name or beginning letters.
State	Select the appropriate state.
ZIP/Postal code	Enter the Zip code. You can enter the entire code or the beginning digits.

Screen Item	Description
Match all criteria exactly	<p>If a search must match your criteria exactly, mark this checkbox. An entry in a field returns only an exact match of the characters you enter. You can enter both a first and last name or a full or partial last name.</p> <p>When you mark this checkbox, wildcard characters do not work and are instead used as regular characters. For example, an asterisk (*) or percent sign (%) is used literally, rather than as a replacement for a group of characters. Similarly, a question mark (?) or underscore (_) is no longer used as a replacement for one character.</p>
Show advanced search options/Hide advanced search options	To show all search options, click the down arrow beside Show advanced search options . To hide the advanced search options, click the down arrow beside Hide advanced search options . Using advanced search options, you can mark additional checkboxes to refine your search.
Individuals Organizations Groups/Households	To include individuals, organizations, and groups/households in your membership search, mark the appropriate checkbox. You can mark one, two, or all three checkboxes. By default, Groups/Households is not marked. If you include groups and households in your search, it may take longer to return results.
Check nickname	<p>To include a nickname in your search, mark this checkbox. For example, to search for Robert Hernandez by his nickname, mark the checkbox. You can now enter "Bob" in the First name field when searching for him.</p> <p>For an individual, the nickname appears on the Personal tab of the constituent page.</p>
Check aliases	To include an alias in your search, mark this checkbox. Aliases appear on the Names tab of the constituent page.
Include fuzzy search on name	You can have the search include fuzzy name matching to include other names of individuals. The search logic looks for similar sounding names like Smith and Smyth and returns them all in the results.
Search (button)	Once you enter criteria, to activate the search, click the button.
Clear (button)	To remove your criteria and begin a new search, click the button.
Results (grid)	The search results appear in this bottom grid and include the membership ID and program.
Select (button)	In the Results grid, select a constituent and click the button.

Daily Tasks and the Create Deposits Process

Manually Open Cash Drawers	29
Count Initial Cash	29
Close Drawer	30
Configure Close Drawer Policy	33
Review Closed Drawers	33
Submit Closed Drawer	35
Approve Closed Drawers	35
Allocate Cash Over/Short	37
Edit Sales Method Allocation	37
Edit Submitted Closed Drawers	38
Approved Closed Drawers	39
Create Deposits Process	39
Configure Deposit Templates	40
Run Deposit Process	42
View Deposit Process Information	44
Schedule a Deposit Process Job	45
Scan Tickets	47
Scan Tickets from Sales	48
Scan Tickets from Daily Sales Page	48

From both *Sales* and *Treasury*, you can create and review deposit processes. With the create deposits process, you can create deposits for all eligible payments made through *Sales*, *Treasury* (miscellaneous payments), and the back office. Examples of back office revenue include payments made as part of a batch or from a revenue record outside of *Sales* and *Treasury*.

From *Sales*, you can perform a number of daily tasks that are necessary to begin and end sales shifts. To start a sales shift, you count the initial cash in your drawer. At the end of your shift, you close your drawer. You can also manually open the cash drawer if needed. In addition to the open and close day tasks typically performed by a ticket seller, there are a number of tasks a guest services manager will complete as part of their day, such as approving the closed drawer of ticket sellers.

For information about the tasks involved with creating and reviewing deposit processes from either *Sales* or *Treasury*, you can review either the *Sales Guide* or *Treasury Guide*. For information about the daily tasks necessary to begin and end sales shifts, refer to the *Sales Guide*.

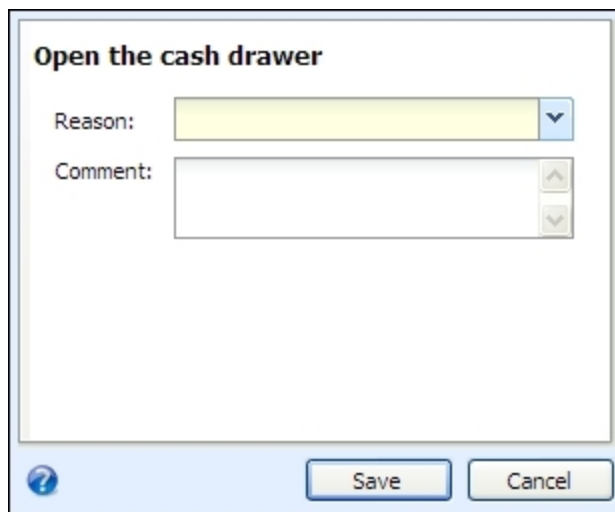
Manually Open Cash Drawers

When a compatible cash drawer is installed and configured correctly, it will open automatically based on the payment method selected during a transaction. For example, the cash drawer can be configured to open when the “Cash” payment method is selected during a sale or refund.

If needed, a user with the required system role can manually open a cash drawer when no sale or refund has taken place. To aid in fraud prevention, you must provide a reason when opening a cash drawer manually.

> Manually open a cash drawer

1. From *Sales*, click **No sale/open cash drawer**. The Open the cash drawer screen appears.



The screenshot shows a dialog box titled "Open the cash drawer". It has a light blue header bar with a question mark icon on the left. Below the header, there are two input fields. The first is labeled "Reason:" and has a yellow dropdown menu with a downward arrow. The second is labeled "Comment:" and has a white text area with upward and downward scroll arrows on the right side. At the bottom of the dialog, there are two buttons: "Save" and "Cancel".

2. In the **Reason** field, select the reason you are opening drawer. If needed, you can add a new reason by entering it in the field.
3. In the **Comment** field, you can enter additional notes about why you are manually opening the cash drawer. For example, you can provide additional details about the circumstances that may not be evident from the reason you selected.
4. Click **Save**. The cash drawer opens.

Count Initial Cash

If your organization’s workflow requires that you record the amount of money in your cash drawer at the beginning of each shift, after you log in, you can enter a starting balance. When you reconcile your

sales, this amount automatically appears in the **Starting balance** field on the Reconcile sales screen. You can edit this amount at any time until you submit the reconciliation.

> Count your initial cash

You can enter a starting balance when you begin a shift. This step is not required to reconcile your payments at the end of the shift.

1. From *Sales*, click **Count initial cash**. The cash drawer opens and the Count initial cash screen appears.

2. In the **Starting balance** field, enter the current amount in the cash drawer.

Tip: Click the calculator to quickly add the cash drawer amounts. Enter the number of each currency denomination, and then click **Save** to add this total to the **Starting balance** field.

3. In the **Comment** field, enter any details about the starting balance.
4. Click **Save**. You return to the Sales page.

Note: You can have only one cash drawer open at any time. Before you can open a new cash drawer, you must submit a Sales Reconciliation report for approval. When you submit the report, the program automatically closes your cash drawer.

Close Drawer

As a ticket seller at the end of a shift, you count the cash, coins, and checks in your drawer and enter the sum amount on the Close drawer screen accessed from *Sales*. You can also view other payments such as credit card transactions.

To help define the way your organization processes closed drawers, you can specify a close drawer policy. From *Sales*, click **Close drawer policy**. For more information, see [Configure Close Drawer Policy on page 33](#)

Note: Because online sales do not involve cash or checks and there are no receipts, there is no drawer to close. A supervisor simply creates a deposit for sales processed online. For more information, see [Run Deposit Process on page 42](#).

When you save, you are prompted to submit the close drawer. When you click **Yes**, the close drawer is submitted. When you click **No**, the Close Drawer report is displayed for you to review. If the report is

correct, click **Submit closed drawer** to close your shift and submit the report for supervisor approval. If the report is incorrect, you can edit the information by accessing the Close drawer screen again and making the necessary changes. If you do not submit the close drawer report, the shift remains open.

Tip: We recommend that all users who makes sales, including group sales, close drawers on a daily basis. This closes out their sales, ends the shift, and helps get payments to the bank more frequently. Group sales coordinators may not have cash and coins to count but will likely have checks, credit card receipts, and security deposits. For more information about establishing a drawer close policy, see [Configure Close Drawer Policy on page 33](#).

Note: A supervisor or other user with the appropriate security rights can close a drawer for a ticket seller with an open shift. For more information about how to close a drawer for another user, see [Edit Submitted Closed Drawers on page 38](#).

➤ Close drawer

1. From *Sales*, click **Close drawer**. The cash drawer opens and the Close drawer screen appears.

The screenshot shows the 'Close drawer' interface with the following data:

Date: 9/8/2011
User: Mike Smith
Reference:

Cash in drawer

Currency	Quantity	Value	Currency	Quantity	Value
\$100	1	\$100.00	\$1	6	\$6.00
\$50	50	\$2,500.00	50¢	50	\$25.00
\$20	10	\$200.00	25¢	12	\$3.00
\$10	5	\$50.00	10¢	40	\$4.00
\$5	85	\$425.00	5¢	55	\$2.75
\$2	0	\$0.00	1¢	82	\$0.82
\$1	263	\$263.00			

Total cash: \$3,579.57
Starting balance: \$0.00
Cash for deposit: \$3,579.57

Checks in drawer

Number of checks:
Check total:
Checks and cash for deposit: \$5,139.57

Other payments

Payment method	Number of transactions	Transaction total
MasterCard	1	\$50.00
Visa	1	\$100.00

2. In the **Reference** field, enter any additional information to help further identify the close drawer process.

3. Under **Cash in drawer**, use the **Currency**, **Quantity**, and **Value** columns to calculate the amount of cash and coins in the drawer. In the **Quantity** column, you can enter the amount for each type of cash and coins. For example, if you have five \$20 bills, enter "5" in the \$20 row. Press tab and "\$100" automatically appears as the total.

The **Total cash** field displays the total amount of both cash and coins. The **Starting balance** field displays the initial cash amount that was added using the **Count initial cash** task in *Sales*. The **Cash for deposit** field displays the total cash minus the starting balance.

4. To hide the calculator, click **Hide calculator**.

When you hide the calculator, the **Cash total** field appears. In the **Cash total** field, enter the total amount of cash and coins in the drawer at the end of the shift. This amount is the cash you received from sales plus the amount in the drawer when the shift began. Click **Show calculator** to help accurately total the various types of currency in your cash drawer.

5. Under **Checks in drawer**, in the **Number of checks** field, enter the total number of checks.

6. In the **Check total** field, enter the total amount for all checks.

7. Under **Other payments**, other types of payment transactions that were made for the drawer are displayed. The payment method, number of transactions, and transaction total appear for each transaction.

For example, if four Visa payments occurred for the drawer, one row is listed for all four payments. To view details about the transactions, click **View transactions**.

8. Click **Save**. You are prompted to submit the closed drawer.

9. Click **Yes** to submit the closed drawer. If you do not want to submit the closed drawer, click **No**.

The Closed Drawer page appears and the Closed Drawer report is displayed for you to review. This report shows the cash drawer amount entered on the Close drawer screen, as well as the number of checks and other payment transactions based on your sales orders.

10. To view payment and refund details on the report, select **Transaction details** and click **Refresh**.

Note: If you add a sales order payment after you begin the close drawer process, you should update the actual cash amount or payment quantities on the Close drawer screen before you submit the closed drawer for approval.

11. If the report is correct, under **Tasks**, click **Submit closed drawer** to close your shift and submit the report for supervisor approval. If the report is incorrect, under **Tasks**, click **Close drawer** to access the Close drawer screen again and edit the information you previously entered. Once you correct the information, click **Save** and submit the report for approval.

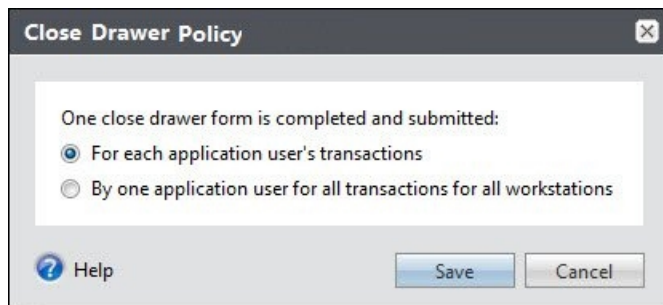
Note: If you do not submit the closed drawer report, the shift remains open. A supervisor or other user with the appropriate security rights can close the drawer for a ticket seller with an open shift. For more information about how to close a drawer for another user, see [Edit Submitted Closed Drawers on page 38](#).

Configure Close Drawer Policy

To help define the way your organization processes closed drawers, you can specify a close drawer policy. From *Sales*, click **Close drawer policy**.

➤ Configure close drawer policy

1. From *Sales*, under **Configuration**, click **Close drawer policy**. The Close Drawer Policy screen appears.



2. To specify that one close drawer form is completed and submitted for each application user's transactions, select **For each application user's transactions**. Only transactions associated with the user who initiates the close drawer process are included.
3. To specify that one close drawer form is completed and submitted by one application user for all transactions for all workstations, select **By one application user for all transactions for all workstations**. All transactions for all workstations are included in the close drawer process.
4. Click **Save**. You return to the Sales page.

Warning: You can only edit the drawer close policy after all open drawers are submitted.

Review Closed Drawers

When you save a closed drawer and choose not to submit it upon saving, the Close Drawer report is displayed. This report shows the cash drawer amount as well as checks and other payments entered on the Close drawer screen. It also shows the expected number of checks and other receipts as calculated by the system.




Note: A closed drawer with a "Submitted" status displays different levels of information in the Close Drawer report than a closed drawer with an "Approved" status. Differences exist when the close drawer includes cash details rather than a total cash account. For example, a submitted Close Drawer report may display currency and coin amounts, a total amount for cash and checks, and an expected amount for payments other than cash or check. An approved Close Drawer report may display the total cash counted and starting balance in the report.

Close Drawer

User name: Nancy Smith Reference:

Date: 9/27/2011 11:40:01 AM

Include: Transaction details

1 of 1 100% Find | Next   

Close Drawer

User name: Nancy Smith

Date: 9/27/2011 11:40:01 AM Include: Transaction details

Payment method	Type	Actual amount	Expected amount	Actual count	Expected count
Cash for deposit		\$70.00	\$0.00	-	-
	Currency \$100	\$100.00	-	1	-
	\$50	\$200.00	-	4	-
	\$20	\$20.00	-	1	-
	Starting balance	(\$250.00)	-	-	-
Check		\$200.00	\$300.00	1	2
Credit card		-	\$15.00	-	1
	MasterCard	-	\$15.00	-	1

Reference:

Payment details

Payment method	Order #	Time	Amount	Count	Details	Patron name
Check						

Note: Because online sales do not involve cash or checks and there are no receipts, there is nothing to review or approve. A supervisor simply creates a deposit for sales processed online. For more information, see [Run Deposit Process on page 42](#).

If a supervisor views a closed drawer from the Approve Closed Drawers page, an **Expected amount** column is displayed on the report. This column displays what the system has calculated as the expected amount that should be in the drawer. The figures in the **Expected amount** column are adjusted to reflect refunds. For example, if a ticket seller received \$300 in cash payments and refunds \$50 in cash before reconciling, the expected amount is \$250. The **Expected amount** column is only available if you have the proper security rights. As a fraud prevention measure, the **Expected amount** column is not displayed on the Close Drawer report generated during the close drawer process for ticket sellers.

You should review this report to compare the check and receipt quantities with the expected quantities calculated by the system. This enables you to find possible errors and make corrections before you submit the closed drawer. If you find errors, you edit the Close drawer screen before you submit the close drawer for approval.

Tip: To view payment and refund details in the report, select **Transaction details** and click **Refresh**.

When you submit the closed drawer for approval, you complete the close shift process. Only a supervisor or other user with proper security rights can approve a close drawer, edit a submitted closed drawer, or view cash information on the Close Drawer report. For more information about specifying a drawer close policy, see [Configure Close Drawer Policy on page 33](#).

Note: If you add a sales order payment after you begin the close drawer process, you should update the actual cash amount or payment quantities on the Close drawer screen before you submit the closed drawer for approval.

Submit Closed Drawer

After you review the information in the Close Drawer report, click **Submit closed drawer** under **Tasks** in the explorer bar to submit the closed drawer for approval and close your cash drawer. A supervisor or other user with the appropriate security rights can then approve or update the close drawer and create a deposit. This process is necessary only for non-online transactions.

Approve Closed Drawers

From the Approve Closed Drawers page, a supervisor or other user with the proper security rights, determines which payments to include in the deposit process. To access the Approve Closed Drawers page, from *Sales*, click **Approve closed drawers**.

Approve Closed Drawers

Closed drawers (14 items)
 Approve all Approve selected Edit Allocate cash over Allocate check short

<input type="checkbox"/>	User name	Originally submitted on	Status	Cash over/(short)	Check over/(short)	Total other payments	Approved by	Appro
<input type="checkbox"/>	Aram Aghapour	9/30/2011 3:21:26 PM	Submitted	\$0.05	\$0.00	\$418.70		
<input type="checkbox"/>	Nancy Miller	9/30/2011 11:02:03 AM	Submitted	\$0.00	\$0.00	\$24.00		
<input type="checkbox"/>	Debbie Smith	10/3/2011 3:53:09 PM	Submitted	\$21.00	\$0.00	\$9.95		
<input type="checkbox"/>	Nancy Miller	9/30/2011 4:05:39 PM	Submitted	\$0.10	\$0.00	\$3.00		
<input type="checkbox"/>	Debbie Smith	10/3/2011 3:35:25 PM	Submitted	\$2.57	\$0.00			
<input checked="" type="checkbox"/>	Amy Patterson	10/3/2011 12:10:49 PM	Submitted	\$280.00	(\$146.90)			

User name: Amy Patterson
 Drawer close date: 10/3/2011

Cash payments	Check payments	Other payments
Total cash counted: \$280.00	Number of checks counted: 0	
Starting cash balance: \$0.00	Expected check count: 1	
Net cash for deposit: \$280.00	Check count difference: -1	
Expected cash payments: \$0.00	Total amount of checks counted: \$0.00	
Expected cash refunds: \$0.00	Expected check payments: \$146.90	
Cash over: \$280.00	Check short: (\$146.90)	
		Total depositable other payments: \$0.00

Total cash and checks: \$280.00 Total depositable other payments: \$0.00 Total deposit amount: \$280.00 Total non-depositable payments: \$0.00 nts: \$0.00

<input type="checkbox"/> Benton Austin	Open
<input type="checkbox"/> Cy Shealy	Open

On the Approve Closed Drawers page, you can view a list of the closed drawers that are open, submitted for approval, or approved but not yet processed. From this page, you can approve closed drawers one by one or all at once.

You can also select a new sales method allocation for cash and check overages and shortages. Use the **Allocate** buttons in the action bar to apply a new sales method for overages and shortages. For example, when you select a closed drawer with a cash overage, click **Allocate cash over** in the action bar. The Allocate cash over/(short) screen appears. From this screen, you can select a new sales method in the **Sales method** field. The sales method allocation you select determines which deposit receives the over/(short) transaction. Note that **Allocate** buttons only appear in the action bar for submitted closed drawers. To edit the sales method for approved closed drawers, you must first change the closed drawer status to "Submitted."

Note: When there are no expected cash sales for a closed drawer, and overages or shortages exist, "Daily Sales" is used as the sales method allocation. When there are no expected check sales for a closed drawer, and overages or shortages exist, "Group Sales" is used as the sales method allocation. For more information about editing the over/short sales method allocation for cash and checks, see [Allocate Cash Over/Short on page 37](#).

Each closed drawer appears in a separate row. If you edit the closed drawer, the transactions that appear on the Close drawer screen depend on the close drawer policy you specified. For more information about the close drawer policy, see [Configure Close Drawer Policy on page 33](#).

Note: Cash refunds appear as deposit corrections in the **Other payments** grid.

When a ticket seller logs in and begins to place sales orders, the program links order payments received to the ticket seller. At the end of a shift, the ticket seller closes a drawer and submits a Close Drawer report for review. From the Approve Closed Drawers page, these closed drawers appear with a "Submitted" status. After you review a submitted closed drawer, you can approve the payments in the closed drawer to include in the deposit process.

If you need to edit a closed drawer, you can update the actual cash amount or number and total of checks in the closed drawer, or you can open the Close Drawer report to access a specific order and edit payments. If you include transaction details when viewing the Close Drawer report, each order number listed in the report is an active link that you can click to open the corresponding order record. From the open order record you can view and edit individual payments and mark them as "Do not post" if needed. When you return to the Approve Closed Drawers page, any changes you made appear in the details for the selected closed drawer.

Click a closed drawer to display additional details below the closed drawer. These details include the same information from the Close drawer screen for a closed drawer. For cash payments, details such as total cash counted and starting cash balance appear. The net cash for deposit equals the total cash counted minus the starting cash balance. You can also view any cash shortages or overages. These are calculated based on the difference between the actual and expected cash payments.

For check payments, you can view the number and total of checks as well as any check count or payment differences.

Payments other than cash or check are also displayed in the **Other payments** grid and include the payment method, deposit amount, and number of payments. Payments, such as coupons and gift certificates, are not added to the deposit.

Note: In the **Other payments** grid, check refunds appear as "Refunds - Checks." If you are a front office user and you refund a payment previously entered through a back office, such as one-off or

through a batch, the refund is not included in the closed drawer or the deposit created through the deposit process. Once the deposit is created, you can unlock the deposit and link the refund to the deposit from the Refunds tab of the Deposit page.

Note: When a ticket seller adds a payment to a sales order, the program links the seller to the payment. When the ticket seller closes the drawer at the end of a shift, payments the seller received for all sales methods appear in the Closed Drawer report. For example, if an advance sales ticket seller enters a group sales payment, the seller's report includes this payment.

If a ticket seller does not submit a closed drawer at the end of a shift, or if the individual is currently making sales, a closed drawer with a status of "Open" appears on the Approve Closed Drawers page. Before you can approve a closed drawer with an Open status, you must close the drawer and submit the Close Drawer report. You can then approve the submitted closed drawer. When you approve a closed drawer in the list, the deposit information updates to include the approved payments. The Deposit summary displays the number of payments and amounts by payment method and type, as well as the total number and amount of all payments the deposit will include.

Note: Because online sales do not involve cash or checks and there are no receipts, there is no drawer to close and approve. A supervisor simply creates a deposit for sales processed online. For more information, see [Run Deposit Process on page 42](#).

To view the Close Drawer report for a closed drawer, click the user name for the closed drawer. The Close Drawer report appears. From this page, you can view the transactions and print the report. For information about the report, see [Close Drawer Report on page 317](#).

Allocate Cash Over/Short

In *Sales*, the Approve Closed Drawers page displays amounts in the **Cash over/(short)** column and **Check over/(short)** column to signify differences between amounts entered on the Close drawer screen and amounts calculated by the program. Use the **Allocate** buttons in the action bar to apply a new sales method for the overage or shortage. For example, when you select a closed drawer with a cash overage, you can click **Allocate cash over** in the action bar. The Allocate cash over/(short) screen appears. From this screen, you can select a new sales method in the **Sales method** field.

Note: When there are no expected cash sales for a closed drawer, and overages or shortages exist, "Daily Sales" is used as the sales method allocation. When there are no expected check sales for a closed drawer, and overages or shortages exist, "Group Sales" is used as the sales method allocation.

Edit Sales Method Allocation

Allocate Over/Short Sales Method

1. From *Sales*, click **Approve closed drawers**. The Approve Closed Drawers page appears.
2. Select a closed drawer and click an **Allocate** button in the action bar. For example, click **Allocate cash over**. An allocate screen appears.

Allocate cash over/(short)

User name: Leah Patterson

Cash short: (\$1.25)

Short sales method allocation

Sales method: Daily sales

Help Save Cancel

The screen displays the user name as well as information specific to the cash or check shortage or overage. Shortages appear in parentheses to signify a difference in amount.

3. In the **Sales method** field, select a new sales method. The sales method allocation you select determines which deposit receives the over/(short) transaction.
4. Click **Save**. You return to the Approve Closed Drawers page.

Edit Submitted Closed Drawers

After you review the closed drawer, if you noticed an error, you can edit the closed drawer before you approve it. This process is necessary only if you need to correct a closed drawer. If no corrections are needed, you can proceed with approving the closed drawers.

> Edit a submitted closed drawer

Note: To edit an approved closed drawer, you must first change the status to "Submitted." Select the closed drawer and click **Mark submitted** in the action bar.

1. From *Sales*, click **Approve closed drawers**. The Approve Closed Drawers page appears.

Note: For closed drawers with a status of "Open," click **Close Drawer** on the action bar.

2. Select the closed drawer and click **Edit** on the action bar. The Close drawer screen appears.
3. Make any necessary edits and click **Save**. You return to the Approved Closed Drawers page.

Approved Closed Drawers

After you review the closed drawers, you can approve those that have a status of “Submitted.” You can approve each individual closed drawer or approve them all at once. You should approve only the closed drawers that you want to be included in the deposit. For information about how to create deposits, see [Create Deposits Process on page 39](#).

Note: Because online sales do not involve cash or checks and there are no receipts, there is no drawer to close and approve. A supervisor simply creates a deposit for sales processed online. For more information, see [Run Deposit Process on page 42](#).

To approve a single closed drawer, select the closed drawer you want to approve and click **Approve selected**. To approve all closed drawers, click **Approve all**.

After you approve closed drawers, you can run the deposit process to create deposits. For information about how to run the deposit process see [Run Deposit Process on page 42](#).

Create Deposits Process

Note: Only a supervisor or user with proper security rights can manage deposit templates or run the deposit process.

The deposit process is typically part of the close drawer process for ticket sellers and guest services managers each day. During the close drawer process, a ticket seller calculates the cash, checks, and credit card receipts in the drawer at the end of a shift and submits the closed drawer for approval. The guest services manager then approves the closed drawer and creates a deposit for the payments.

With the create deposits process, you can create deposits for all eligible payments made through *Sales*, *Treasury* (miscellaneous payments), and the back office. Examples of back office revenue include payments made as part of a batch or from a revenue record outside of *Sales* and *Treasury*.

Payments can be linked to deposits in several ways. You can manually link a payment to a deposit, link multiple payments to deposits using the **Link multiple payments** task in *Treasury*, or link payments to deposits using the create deposits process.

Deposits Workflow

Step 1: Configure Deposit Templates

Before you can create deposits, you must create deposit templates. When you create deposit templates, you must select the revenue sources and payment methods that the template will use. You can create different deposit templates based on the revenue sources you need, such as advance sales or daily sales. For more information about deposit templates, refer to [Configure Deposit Templates on page 40](#).

Step 2: Run the Deposit Process

You'll probably want to run the deposit process daily or on the following business day. You can run the create deposit process manually or automatically using a job schedule. For more information, see [Run Deposit Process on page 42](#).

Step 3: View Deposit Process Information

When the deposit process is finished, the process page appears with details about the process including any payment transactions that failed to deposit. You can view the Deposit Summary report which displays summary and detailed information about the selected deposits, such as payment methods, bank account information, and any corrections made to the deposit. Use this information to prepare deposit slips for the bank. For more information, see [View Deposit Process Information on page 44](#).

Note: You can work with deposit processes from *Sales* or *Treasury*. Use the **Review deposits** and **Create deposits** links to create and work with deposit templates, and review and run deposit processes automatically.

Configure Deposit Templates

Deposit templates define which revenue sources and payment methods you want to associate with a specific bank account. For example, you can choose to deposit all cash and checks from front office sales into your checking account.

You must add enough deposit templates to account for all combinations of sales methods and payment methods. We recommend that you create at least three deposit templates grouped like this:

Back office cash and checks

Select Cash and Checks for the payment methods and Back Office Revenue and Treasury Miscellaneous Payments as the revenue sources. **Note:** Back office payments associated with uncommitted batches are excluded from this process.

Front office cash and checks

Select Cash and Checks for the payment methods and Advance Sales, Daily Sales, and Group Sales as the revenue sources.

All credit cards payments

Select Credit Cards for the payment method and all types of revenue sources. **Tip:** This will process include any debit card transactions too.

Tip: Before you create a deposit template, you must configure the bank accounts for your deposits.

> Add a deposit template

1. From *Sales*, under **Data and tasks**, click **Review deposits**. The Deposits page appears. For information about the Deposits page, refer to [View Deposit Process Information on page 44](#).

Note: You can also access the Deposits page from *Treasury*. On the Treasury page, under **Processing**, click **Review Deposits**.

2. Select the Deposit Templates tab and click **Add** on the action bar. The Add deposit template screen appears.

3. Enter a name for the deposit template.
4. Enter the bank account associated with the deposit.

Note: You must configure a bank account to associate with the deposit before you can save a deposit template.

5. In the **Reference** field, select how to identify the deposit on the Register tab of the bank account record.
6. In the **Revenue sources** field, select all or specific revenue sources to include in the deposit template.

To select specific revenue sources, click the magnifying glass. The Revenue sources screen appears and lists the available revenue sources, such as advance sales and back office revenue.

7. In the **Payment methods** field, select all or specific payment methods to include in the deposit template.

To select specific payment methods, click the magnifying glass. The Payment methods screen appears and lists the available payment methods, such as cash.

Note: You can select "Credit card – card type not specified" to include credit card transactions that are not associated with specific credit card types.

8. Click **Save**. You return to the Deposits page. Repeat this process until you have added each deposit template you need.

Run Deposit Process

After deposit templates are created, you can run deposit processes for non-online sales, online sales, miscellaneous payments from *Treasury*, and back office payments. Examples of back office revenue include payments made as part of a batch or from a revenue record outside of *Sales* and *Treasury*.

- **Non-online Sales:** When you run the deposit process for non-online sales, only payments included in approved closed drawers are pulled into the deposit. Before running the deposit process for non-online sales, all ticket sellers should submit their closed drawers and a supervisor should approve them. If a user submits a closed drawer and then starts a new sale, the new sale will not be included in the total amounts submitted with the closed drawer.
- **Online Sales:** Because online sales do not involve cash or checks and there are no receipts, there is no drawer to close and approve. A supervisor runs the deposit process to create a deposit for sales processed online.
- **Miscellaneous Payments:** With miscellaneous payments made from *Treasury* and back office payments, there is no close drawer process. A supervisor runs the deposit process to create a deposit for payments processed from *Treasury* and the back office.

Warning: If a payment in a deposit process is associated with a payment method or revenue source that is not defined in a deposit template, a message appears letting you know that the deposit process cannot run. You must assign the payment method or revenue source to an existing deposit template or create a new template that includes the payment method or revenue source. For more information about how to add a deposit template, refer to [Configure Deposit Templates on page 40](#).

Post Status for Deposits

When you run the deposit process, deposits are created. Payments with a "Not posted" status are linked to "Not posted" deposits and payments with a status of "Do not post" are linked to "Do not post" deposits. Refund payments and any cash over/short amounts created during the close drawer process are included in "Not posted" deposits. When payments are linked to deposits, either manually or through the deposit process, the payment post date is updated to the deposit post date. The default post status for payments is "Not posted." If needed, you can access a payment record and edit the payment to change the status to "Do not post." Deposit details appear in the Deposit Summary Report. Only payments that are not associated with a deposit are eligible to be included in a deposit.

Unlinking Payments or from Deposits

It is important to note that when a payment or refund is included in a deposit process and later unlinked from that deposit, the unlinked payment or refund is considered eligible for inclusion the next time the deposit process is run. Similarly, when a payment or refund is manually added to a deposit and later unlinked, that payment or refund is considered eligible for inclusion the next time the deposit process is run.

Also note that any deposit corrections are generated the first time you create a deposit for an approved closed drawer. When you unlink a payment or refund from a deposit and recreate the deposit, the deposit does not recreate the deposit correction. The deposit correction continues to be associated with the original deposit unless it is deleted. To recreate the original deposit, including any

deposit corrections, you must create the deposit and manually enter deposit corrections on the Deposit Corrections tab of the deposit.

Note: If you run the deposit process for non-online sales and the projected cash amount is greater or less than the expected cash amount, a deposit correction is created. The corrections appear on the Deposit Corrections tab of the Deposits page. For more information about the Deposits page, refer to the *Treasury Guide*.

Run Deposits Automatically

Depending on your organizational structure, you may want to set up a job schedule to run the deposit processes automatically each night. You can set up the exact time and frequency for the deposit process to run. The process will automatically include all deposit templates you configured. After the job schedule is up and running, you can refer back to the Recent Status and History tabs on this page to view details about the most recent processes.

➤ Run the Deposit Process

1. From *Sales*, click **Create deposits**. The Run deposit process screen appears.

Note: You can also access the Run deposit process screen from *Treasury*. On the Treasury page, under **Processing**, click **Create Deposits**.

Run deposit process

Process name: Deposits

Select the payment date cutoff

Payment dates up to: Today 1/9/2012

Select the deposits to be created

Sales deposit template	Bank account	Conflicting templates	Revenue sources	Payment methods
<input checked="" type="checkbox"/> All	Midland checking		All revenue sources	All payment methods
<input type="checkbox"/> All payments	Midland checking	⚠ All	Daily Sales; Advance Sales; Group Sales	Cash; Check; Visa; MasterCard; American Express; Discover; Diner's Club; Check (Debit) Card
<input type="checkbox"/> Back office	Midland checking	⚠ All	Back Office Revenue	All payment methods
<input type="checkbox"/> Treasury	Midland checking	⚠ All	Treasury	All payment methods

Possible number of deposits: 3

Assign the deposit date

Deposit date: Payment date

Help Start Cancel

Note: If you run the deposit process and there is a cash deposit that is over or under the expected amount or short, a deposit correction is created.

- In the **Payment dates up to** field, select to include transactions based on a specific time frame. For example, when you select "Yesterday," the process includes transactions made prior to and including yesterday's date. When you select "Specific date," the **Date** field is enabled.

Warning: When transactions in an approved closed drawer are included in the deposit process, the payment date cutoff is considered. For example, when you select "Yesterday" in the **Payment dates up to** field, and the approved closed drawer includes transactions with dates of yesterday and today, transactions in that closed drawer are excluded from the deposit process. It is important to note that you can only create a deposit process for an approved closed drawer once.

- In the deposit templates grid, select deposit templates you want to include in the deposit process. For each deposit template, you can view the associated bank account, revenue sources, and payment methods.

As you select deposit templates, the **Conflicting templates** column displays any template that conflicts with a template you select. You can only select each payment method once for each revenue source for a deposit template process.

- In the **Deposit date** field, select a date to associate with the deposit.
When you select "Specific day," the calendar field is enabled. Click this field to select a date.
- Possible number of deposits** displays the number of deposits the program could create based on the number of deposit templates you select.

This number can change based on the option you select in the **Deposit date** field. For example, when you select "Payment date" in the **Deposit date** field, the possible number of deposits displays the number of deposit templates multiplied by the number of payment dates.

- To create the deposits, click **Start**. Once the process completes, the Deposit Process page appears. For information about the Deposit Process page, refer to [View Deposit Process Information on page 44](#).

The program uses the selections you make on the Run deposit process screen as defaults for the next deposit process.

Warning: If a payment in a deposit process is associated with a payment method or revenue source that is not defined in a deposit template, a message appears letting you know the deposit process cannot run. You must assign the payment method or revenue source to an existing deposit template or create a new template that includes the payment method or revenue source. For more information about how to add a deposit template, refer to [Configure Deposit Templates on page 40](#).

View Deposit Process Information

After you run a deposit process, the deposits page appears.

Recent Status tab

On the Recent Status tab, you can view information about the most recently run process instance. Under **Undeposited transactions**, you can view approved, undeposited transactions.

History tab

On the History tab, you can view displays information about all past instances including the status, duration, total records processed, and any exceptions. To delete history, select the process and click **Delete**.

Note: When the deposit process runs, payments with a "Not posted" status are linked to "Not posted" deposits and payments with a status of "Do not post" are linked to "Do not post" deposits. Refund payments and any cash over/short amounts are included in "Not posted" deposits. Also note that when payments are linked to deposits, either manually or through the deposit process, the payment post date is updated to the deposit post date.

Deposit Summary Report

Deposits and their associated payments are listed in the Deposit Summary report. To view the report from the Recent Status tab, click **View report**. To view the report from the History tab, select the process to view and click **View report**.

Deposit Templates tab

From the Deposit Templates tab, you can add, edit, or delete deposit templates created for the deposit process.

Job schedules tab

From the Job schedules tab, you can configure a job schedule that automates the deposit process. Using the job schedule and *SQL Server*, the program runs the process at a scheduled time and interval.

Schedule a Deposit Process Job

From the Job Schedules tab of the deposits page, you can schedule deposits to run automatically. When you create a job schedule for a deposit process, you specify the frequency and scheduled time of the occurrence. Using the job schedule and *SQL Server*, the program runs the process at the scheduled time and interval.

You add, edit, and delete job schedules on the Job schedules tab. Additionally, this tab contains a grid that displays information about each existing schedule, including the name of the job, whether a job schedule is enabled, the frequency of the job schedule, the start date and time and end date and time of the scheduled jobs, and the dates the job schedule is added and last changed in the database.

> Create a job schedule

1. On the Job schedules tab click of a process, click **Add**. The Create job screen appears.

Create job

Details

Job name:

Schedule type: ▼

Enabled

One-time occurrence

Date: Time:

Frequency

Occurs every: day(s)

Daily frequency

Occurs once at:

Occurs every: ▼ Starting at:

Ending at:

Duration

Starting at:

End date:

No end date

2. In the **Job name** field, enter a name for the scheduled process.
3. By default, the schedule is active. To suspend it, clear the **Enabled** checkbox.
4. In the **Schedule type** field, select how often to run the process. You can run a process once; on a daily, weekly, or monthly basis; whenever *SQL Server Agent* service starts; or whenever the

computer is idle according to *SQL Server Agent*. Your selection determines which other fields are enabled.

- a. For a process that runs just once, select the date and time to run it.
 - b. For a process that runs on a daily, weekly, or monthly basis, select the number of days, weeks, or months between instances in the **Occurs every** field. For a weekly process, select the day of the week to run it. For a monthly process, select the day of the month to run it. For a process that runs on a daily, weekly, or monthly basis, select whether to run it a single time or at regular intervals on the days when it runs.
 - c. For a process that runs on a daily, weekly, or monthly basis, select a start date and, if necessary, an end date. To run the process indefinitely, select **No end date**.
5. Click **Save**. You return to the Job schedules tab.

Scan Tickets

You can scan tickets for scheduled programs such as admissions or tours. If you do not have a scanner or have issues scanning a ticket, you can manually enter the ticket number. If the ticket scanned is invalid, a red image appears, otherwise a green image appears. You can also override an invalid entry and undo the last entry. You can also view the last ten tickets scanned under **Recent ticket scans**. You can also click the **Clear** button to clear the image and any information entered in the **Ticket number** field.

Scan Tickets from Sales

1. From *Sales*, click **Scan tickets**. The Scan Tickets page appears.

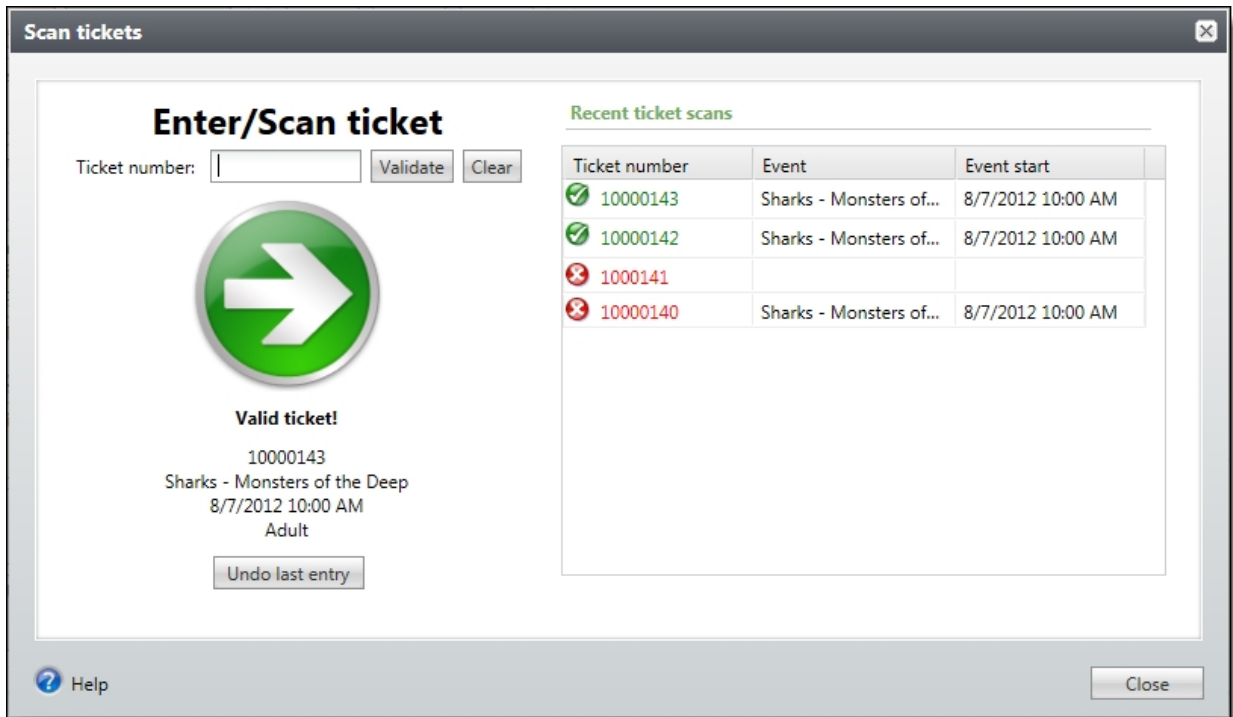
Ticket number	Event	Event start
✓ 10000143	Sharks - Monsters of...	8/7/2012 10:00 AM
✓ 10000142	Sharks - Monsters of...	8/7/2012 10:00 AM
✗ 1000141		
✗ 10000140	Sharks - Monsters of...	8/7/2012 10:00 AM

Note: You can also scan tickets from the Daily Sales page. To do this, you must first activate the default daily sales button, **Scan tickets**. To activate the button, from *Tickets*, click **Configure daily sales buttons**, under **Configuration**.

2. Scan the ticket or manually enter the ticket number and click **Validate**. Under **Recent ticket scans**, you can view the last ten tickets scanned.
3. Verify the information. If the ticket is invalid, you have the option to override the scan and allow entry. You can also undo the last valid entry in case the ticket information does not match the patron's information. To do this, click **Undo last entry**.

Scan Tickets from Daily Sales Page

1. From *Sales*, click **Daily sales**. The Daily Sales page appears.
2. Click **Scan tickets**. The Scan tickets screen appears.



Note: You can also scan tickets from *Sales*, click **Scan tickets**, under **Daily tasks**.

- Scan the ticket or manually enter the ticket number and click **Validate**. Under **Recent ticket scans**, you can view the last ten tickets scanned.
- Verify the information. If the ticket is invalid, you have the option to override the scan and allow entry. You can also undo the last valid entry in case the ticket information does not match the patron's information. To do this, click **Undo last entry**.

Advance Sales



Advance Sales Process Workflow	50
Step 1: Select a Patron	51
Step 2: Create the Order	51
Step 3: Complete the Order	53
Cancel Orders	54
Complete Orders	54
Confirm Delivery Information	54
Mark an Order Tax Exempt	55
Edit Items in an Order	56
Remove Items From an Order	57
Add Payments	57
Defer Payment	59

During the advance sales process, a patron can purchase tickets to scheduled events or general admission programs. They can also purchase new memberships, give a gift of membership, and renew or rejoin memberships. Additionally, you can accept donations during a sales transaction, process registrations for fundraising events, sell merchandise items, and apply discounts.

Advance Sales Process Workflow

The advance sales process consists of three primary steps: Select a patron, Create the order, and Complete the order. During each sales transaction, you select an existing patron record to associate with the order, create a new patron record, or proceed with an anonymous sale. You then select the items being purchased and apply any discounts. Finally, to complete the order, you verify delivery information and accept or defer payment. To access the Advance Sales page to begin an advance sales order, from *Sales*, click **Advance sales**.

If you associate the order with a patron, their name and contact information also appear, along with active memberships and constituencies.

As you progress through the sales order, you can always refer to the order summary to view the contents and information included in the order. The summary acts as the patron's shopping cart and automatically updates as you add items to the order. In the summary, information such as the quantity and price breakdown of each item appears, as well as any fees, taxes, and discounts applied. As necessary, you can edit and remove items from the summary.

Step 1: Select a Patron

When you start the sales process with a new order, you begin on the Select Patron tab. From this screen, you select an existing patron record to associate with the order, create a new patron record, or proceed with an anonymous sale. A patron record is not required for ticket sales, but is required for memberships, donations, and event registrations.

Note: Processing anonymous orders is an option that may be helpful when you are working in a busy walk-up sales environment where creating new patron records could slow the sales process and create long lines. This option is available only if the delivery method for the order does not require a patron record, for example, a walk-up sale with in-person delivery.

If the patron already has a record, you can type their name into the **Patron** field or click the magnifying glass to search for their record. If the patron has a membership card, you can also swipe it to automatically associate them with the order. After you select an existing patron or add a new one, their primary contact information is displayed. Recent activities in which they participated and any upcoming activities, such as events for which they are registered, also appear on the screen.

The primary contact information displayed includes name, primary address, email address, and phone number. If applicable, the patron's active constituencies and memberships are also displayed. Depending on the status of each membership, there may be buttons displayed to renew, rejoin, upgrade, or activate. The renew button appears if the membership is currently active or in the renewal window. The rejoin button appears if the membership lapsed or was canceled, the upgrade button appears if an upgraded membership is available, and the activate button appears if the membership is pending.

As part of the sales process, you should verify the contact information with the patron. If it is correct, you can continue with the sale. However, if the patron's contact information is incorrect, you should update the record. To update the contact information on file, click **Edit** under **Contact information**. For more information, see [Edit Primary Contact Information for Patrons on page 22](#).

Note: If needed, you can also update a patron's personal information, which includes name, nickname, marital status, maiden name, gender, birth date, website, and other information. To view or change this information, click the pencil button next to the patron's name in the search field. For more information, see [Edit Patrons on page 20](#).

Step 2: Create the Order

After you associate a patron with the order or determine the order does not require a patron record, select the Create Order tab. From the Create Order tab, you can add tickets to the order for admission or scheduled events, as well as sell new memberships or a gift of membership. Additionally, you can register patrons for fundraising events, accept donations, and apply discounts to the order. Each item you can include in an order is described below.

Scheduled Program Tickets

During the sales process, a patron can purchase tickets to scheduled programs. Scheduled programs are events that occur at defined times. To select the tickets to purchase, on the Create order tab, select

the day or range of days and the specific program. For information about how to sell tickets for scheduled programs, see [Sell Tickets for a Scheduled or Pre-registered Program on page 68](#).

Pre-registered Program Tickets

When you sell tickets for a pre-registered program, you must associate a patron with the order. The patron can be an attendee or a "host" registrant does not attend. In addition, you select price types and enter registration information for the attendees during the sales process. The attendees can be unnamed registrants that are identified only by the selected price types, or you can select or add a patron record for each. If registration questions were configured for the event to track things like contact information, meal preference or shirt size, you also enter the information for each attendee. For information about how to sell tickets for pre-registered programs, see [Sell Tickets for a Scheduled or Pre-registered Program on page 68](#).

Combination Tickets

When a patron purchases a combination, they select one event from each specified program group configured for the combination. For example, if the combination contains three program groups, the patron specifies the ticket quantity and price types needed, then selects one event from each group. Combinations are sold as a single item. For information about how to sell combination tickets, see [Sell Combination Tickets on page 73](#).

New Memberships

During the sales process, you can sell new memberships to patrons. New membership sales are for patrons who have not previously been a member. If the membership buyer does not have a patron record, you must add one to complete the order. For more information about how to sell a new membership, see [Sell New Memberships on page 76](#).

Gift Memberships

A patron may purchase membership as a gift for another patron. The gift can be a new or renewed membership or the activation of a pending membership. If the membership buyer does not have a patron record, you must add one to complete the order. The person who receives the gift membership must also have a patron record. For information about how to sell gift membership, see [Sell Gift Memberships on page 81](#).

Renew or Rejoin Memberships

During the sales process, patrons can renew or rejoin existing memberships if applicable. After you associate a patron with an order, on the Select patron tab, a button to renew or rejoin the membership appears if the patron is eligible. For information, see [Renew, Upgrade, Rejoin, or Activate Memberships in a Sales Order on page 81](#).

Donations

During a sale, a patron may want to donate to your organization. For efficiency, you can process donations in the same order with other purchases. For example, a patron can buy tickets to an event, purchase a membership, and donate to your organization all through a single transaction. For information about how to accept donations, see [Accept Donations on page 85](#).

Register for Fundraising Events

During a sale, you can register patrons for existing events and accept payments toward existing event registrations. For information about how to register a patron for a fundraising event, see [Register for Fundraising Events on page 86](#).

Order Discounts

Before you accept payment for an order, you can apply discounts to reduce the total price. You can apply valid manual discounts and apply promotion code discounts when presented by the patron. Any discounts configured to apply automatically appear in the order summary as you add items to the order. After discounts apply, the program automatically recalculates and displays the price of the order in the summary. For information about how to process order discounts, see [Apply Order Discounts and Promotions on page 90](#).

Order Fees

Fees can apply on a per item or per order basis and are configured as a flat amount or a percentage. In addition to per item and per order fees, you may have delivery fees, which apply only when the patron selects a delivery method that carries a fee, such as standard mail or overnight mail. Your organization may also charge fees based on sales methods. If necessary, you can manually remove a fee from an order.

Order Taxes

If your organization is required to charge tax, each tax is configured and assigned to the programs you sell. Taxes are always a percentage, which is calculated according to the rate entered when the tax is configured. When an order is processed that involves an item with a tax, the program charges the appropriate tax. The total taxes charged appear in the order summary. You can make an order tax exempt, for example, when the patron is from a tax exempt state or a government employee. For more information, see [Mark an Order Tax Exempt on page 55](#).

Step 3: Complete the Order

After you add all of the items to the patron's order and applied any applicable discounts, select the Accept Payment tab. You can select a different delivery method if necessary and accept payments to complete the order and process the transaction.

As part of the sales process, you should verify the contents of the order with the patron. If the order is correct, you can continue with the sales process and accept payments. However, if the contents of the order are incorrect, you should edit or remove items in the **Order summary** section.

From the Accept Payment tab, you can enter one or more payments and specify a different payment method for each transaction. Patrons have the option to pay immediately after their order is placed, or if they purchase tickets to a program or event that is to be held at a future date, they can defer payment until they arrive to claim their purchase.

Note: If the patron elects to defer payment, any fees, taxes, or discounts that have been applied will be recalculated when the patron arrives to claim their purchase. For example, if the order was placed on a day that a certain discount was valid, if the discount is no longer valid when they arrive to pay for their purchase, the discount will automatically be removed.

For more information about adding or deferring payments, editing or removing items from an order, and confirming delivery information, see [Complete Orders on page 54](#).

Cancel Orders

If a patron changes their mind in the middle of a transaction, you can simply cancel the order. To cancel an order that is in progress, click **Cancel order** under the order summary. This clears the patron information from the Advance Sales page and removes all items, tickets, fees, taxes, and discounts from the order.

When you add tickets to an order, the program marks them as reserved to prevent them from being sold to another patron. When you cancel the order, any tickets included in the order return to ticket inventory and made available for other patrons to purchase.

After you complete an order, you can no longer cancel it. Instead, you must process a refund for the patron. For information, see [Refund Transactions on page 274](#).

Complete Orders

To finalize the purchase and complete an order, you confirm the delivery information to make sure the purchase will be shipped or emailed to the correct address. You can also review the items in the **Order summary** with the patron and edit or remove items as needed. Finally, you can add payments to the order, or select "Pay on arrival" to defer payment.

Confirm Delivery Information

Delivery information determines how patrons receive tickets. When you place an advance sales order, the program uses the default delivery method for advance sales and the patron's primary contact information. If the delivery method requires additional information from the patron, such as a phone number or address a warning message appears under **Delivery** on the Order page. As part of the sales process, you should confirm delivery information with the patron. If the delivery information is incorrect, edit it as necessary.

Note: If you have the proper security rights, you can change the default delivery method from *Tickets*.

Also, the patron may want to select a different delivery method, use alternate delivery information, or choose a different recipient. You can edit this information on the Edit delivery information screen.

➤ Edit delivery information

1. To complete a sale in progress, select the Accept Payment tab.
2. Under **Delivery**, click **Edit delivery information** on the action bar. The Edit delivery information screen appears.

3. In the **Method** field, select a delivery method. If a fee is associated with the delivery method, it appears automatically. You should communicate the fee to the patron.
4. To use the patron's primary contact information for delivery, select **Use patron primary information**. To edit delivery information, clear this checkbox. The recipient information fields become active.

Note: By default, the patron is the recipient and **Use patron primary information** is selected.

5. To select a different recipient, enter the recipient's name in the **Recipient** field, or click the magnifying glass to search for a patron. The Patron Search Screen appears. For information about how to search for a patron, see [Patron Search on page 17](#).

If a patron record does not exist for the desired recipient, you must add one. To add a patron, click **Add** on the Patron Search screen. For more information about how to add a patron, see [Add Patrons on page 20](#).

6. You can select a different address, email address, or phone number if necessary. If alternate addresses, email addresses, or phone numbers exist for the selected recipient, click the corresponding field and select the alternate information.

To add a new address, phone number, or email address, click the add button next to the corresponding field. After you add information, it is saved to the patron's record. For information about how to add a new address, email address, or phone number, see the *Constituents Guide*.

If necessary, you can also click the pencil to edit the selected address, phone number, or email address. For more information about how to edit this information, see [Edit Primary Contact Information for Patrons on page 22](#).

7. Click **Save**. You return to the Order page. The delivery method, recipient name, and delivery information appear under **Delivery**.

Mark an Order Tax Exempt

Sales can be tax exempt under certain circumstances. For example, when patrons from tax exempt states purchase goods and have them shipped to their home or when government employees buy

materials for work purposes. To mark an order tax exempt, in the Order summary section, click the **Remove** button next to **Taxes**. The Tax exempt screen appears.

Select **Mark tax exempt** and select a reason. (Guest services and group sales managers can also enter new reason codes in the **Reasons** field.) In the **Comments** field you can enter additional information about the reason for exemption. Click **Save**. When you return to the sales order screen, the tax amount now says "Tax exempt" and the balance due is updated. Taxes are removed from the entire daily, advance, or group sales order.

Note: A guest services or group sales manager must configure reason codes before you can make an order tax exempt. From the Code Tables page in *Administration*, select the Sales Order Tax Exempt Reason code table in the Ticketing category.

Note: You cannot remove taxes after an order is complete.

Before an order is complete, you can click **Edit** to remove the tax exemption or edit the reason and comments. After the order is complete, you cannot remove the tax exemption, but you can still edit the reason and comments.

Note: For group sales, you can remove taxes on the reservation record under **Pricing and Other adjustments**.

Edit Items in an Order

To edit items in an order, review the **Order summary**. For example, if you selected two "Adult" tickets in error when the patron only wanted one, you can edit the number of tickets.

To edit tickets, merchandise, memberships, or other items added to an order, select the item in the **Order summary** section and click **Edit** on the action bar. The corresponding edit screen appears for you to make the necessary changes. The edit screen that appears depends on the item you selected.

Note: When tickets are selected for purchase, they are reserved while the sales process takes place. This prevents the selected tickets from being sold to another patron. If you reduce the quantity of tickets in an order, those tickets are added back to the program or event's availability.

Remove Items From an Order

Before you accept payment to complete the order, you should verify the contents of the order with the patron. You can remove items in the order if necessary, such as if the patron no longer wants them. To remove tickets, memberships, or other items, select the item in the **Order summary** section and click **Delete** on the action bar. The item is removed from the order.

Note: When tickets are removed from an order, they are added back to the program or event's availability and can be purchased by other patrons.

Add Payments

After you add all items to the order and confirm them with the patron, you can begin to apply a payment to the order. From the Add Payment tab you can enter a full or partial payment to meet the balance due. If you do not enter the full amount of the order balance, you must remain on the Add Payment tab to add additional payments to the order. You cannot complete the order until you reach a zero balance, or a negative balance in the case of a cash overpayment. After you add payments, the **Order summary** is updated to display the payments the patron has made, including information such as payment method, amount, total, and how much change is due if necessary.

If the total price of an order is zero dollars, such as if the patron receives complimentary tickets or a 100% discount, you can complete the order without adding payments. To complete an order of zero dollars, after all items have been added and the balance is zero, click the **Complete order** button. The order is processed and a blank order page appears.

Note: When you first begin an order, the **Complete order** button appears inactive. After you add complimentary items or a 100% discount to the order, the **Complete order** button becomes active. If the patron adds items to their order that bring the total price above zero dollars, the button becomes **Pay on arrival**, and you must either reserve the order and defer payment or add payment to complete the order. After payments are added, the button changes to **Complete order**.

You determine which payment methods to accept for each type of sale from the Sales Methods page in *Tickets*. For information about how to assign payment methods to specific sales methods, see the Configuration Tasks chapter of the *Tickets Guide*.

➤ Add a payment

1. To complete a sale in progress, select the Add payment tab to view the order balance and add payments.
2. Under **Payments**, click a payment method. The corresponding form appears. Enter the necessary information. For an order to be fully paid, you must continue to add payments until the order balance is zero.
 - If you click **Cash**, you can enter a payment greater than the amount owed. The change due is automatically calculated and appears in the **Paid** section of the **Order summary**.
 - If you click **Check**, enter the check date and check number.

- If you click **Credit**, the Add a payment screen appears. Edit the amount if necessary and select whether the credit card is present. Then, click **Save** to proceed to Complete payment and swipe or enter the credit card information.

Note: If there is an issue with the payment gateway, you must process the card manually. When you process the card manually, it is processed through an outside vendor. After you process the card, enter the authorization code. You can then save the payment information.

- If you click "Other," the **Other Method** field appears. In this field, select the form of payment to use, for example, "Gift certificate."

Note: Merchant account settings determine which fields are required. For more information about Merchant Accounts, see the Merchant Accounts chapter of the *Revenue Guide*.

Note: The payment methods available are configured by an administrator and can be different for each sales method. For more information about how to manage payment methods, see the Configuration Tasks chapter of the *Tickets Guide*.

3. After you enter the payment information, click **Save**. The payment is added to the **Order summary**.
 - If the balance is zero, click the **Complete order** button to finalize the sale.
 - If a balance remains after the initial payment, you must repeat this process and accept additional payments before you can complete the order. You cannot click the **Complete order** button until the order balance is zero.

➤ Add a credit card present payment

1. To complete a sale in progress, select the **Add Payment** tab to view the order balance and add payments.
2. In the **Amount** field, enter the amount of the transaction if different from the order balance. For an order to be fully paid, you must continue to add payments until the order balance is zero.
3. Click "Credit card" and swipe the credit card. If the credit card was processed the payment information appears under **Order Summary**.
 - If the balance is zero, click the **Complete order** button to finalize the sale.
 - If a balance remains after the initial payment, you must repeat this process and accept additional payments before you can complete the order. You cannot click the **Complete order** button until the order balance is zero.

Note: The payment methods available are configured by an administrator and can be different for each sales method. For more information about how to manage payment methods, see the Configuration Tasks chapter of the *Tickets Guide*.

4. After you enter the payment information, click **Save**. The payment is added to the **Order summary**.
 - If the balance is zero, click the **Complete order** button to finalize the sale.
 - If a balance remains after the payment, you must add additional payments before you can complete the order. You cannot click the **Complete order** button until the order balance is zero.

Defer Payment

After a patron has placed their order you can offer them the option to defer payment until they arrive to pick up their tickets. If the patron chooses to do so, click **Pay on arrival** to change the order's status to Reserved, and continue to a blank order page so a new order can be placed.

Note: All orders that use "Pay on arrival" receive an order status of "Reserved" and the order is considered unpaid. The order also has a post status of Not posted. The order balance will remain until you add payments and reach a zero balance.

When the patron arrives to claim their purchase, use the Order Search to access the reserved order and add payments. Select the **Only search unpaid orders** filter to locate the patron's order. For more information about how to search for orders, see [Search for Orders on page 240](#).

Tip: From *Sales*, you can also click **Pick up tickets** to access reserved orders. From the Pick Up Tickets screen, use the search options to locate and select the order. For information, see [Defer Payment on page 59](#).

After you access the patron's reserved order, you begin on the Accept Payments tab where you can verify the patron's order and apply payment, or edit or remove items as necessary. Select the Create Order tab if more items should be added to the order. For more information about how to apply a payment, see [Correct Completed Order Payments on page 1](#).

Note: If the patron selects the **Pay on arrival** option to defer payment, any fees, taxes, or discounts that have been applied will be recalculated when the patron arrives to claim their purchase. For example, if the order was placed on a day that a certain discount was valid, if the discount is no longer valid when they arrive to pay for their purchase, the discount will automatically be removed. If the patron purchased tickets to a membership restricted event, their membership eligibility will be checked again when they pay on arrival.

Daily Sales

Daily Sales Process	60
Daily Sales Keypad	61
Search for Patrons	61
Edit Order	62
Accept Payments	62
Remove Sales Items	63
Cancel Orders	63
Capture Marketing Information	63

During the daily sales process, patrons can purchase tickets to scheduled events and general admission programs. They can also purchase merchandise, memberships, give gift memberships, sell merchandise, and renew or rejoin memberships. In addition, patrons can make donations and receive discounts.

Daily Sales Process

On the Daily Sales page, you can sell items such as tickets, memberships, and merchandise. You can also apply discounts and accept donations.

During each sales transaction you can select a patron record to associate with the order, create a new patron record, or proceed with an anonymous sale. A unique order number appears for each sale, and if a patron is associated with the order, their name, primary membership, and constituencies are displayed. After you associate a patron with the order on the Daily Sales page, you can click the constituent link to view additional information about the patron, including memberships. When you click the link, the sales buttons hide, and patron information appears in their place. To view the sales buttons, click the constituent link again. The renewal and upgrade buttons now appear beside the membership information instead of on the sales buttons panel. To view more information about a specific membership, click the membership link. To view constituent information, click **Go to constituent**.

Note: To select an existing patron to associate with the order, enter their name in the **Patron** field, or click the magnifying glass to search for them using the Patron Search screen. To add a new patron, on the Patron Search screen, click **Add**. For information about how to search for patrons, see [Patron Search on page 17](#). For information about how to add patrons, see [Add Patrons on page 20](#).

Membership sales require a patron record, so you must add a new patron or locate an existing patron before you can complete the order. To find members, you can scan membership cards or use the Patron Search.

If there are more than 24 buttons configured, the **Next** button appears. You can use this to scroll through any additional pages of buttons available. After you reach the last page, if you click **Next** again, the first page appears. You can also set how the sales buttons appear on the page.

During the sales process, you can view the contents of the order in the **Order summary**. The **Order summary** acts as the patron's shopping cart and is automatically updated as you select items to purchase. Information such as quantity and price appears, along with any fees, taxes, or discounts. You can edit and remove items in the **Order summary** as necessary. You can also mark an order tax exempt. For more information, see [Mark an Order Tax Exempt on page 55](#).

After you review the items in the order, you can accept payments from the patron. After you accept payments and no balance remains, you can complete the order. If marketing surveys are active, they appear after you click **Complete**.

Daily Sales Keypad

The Daily Sales page keypad has multiple functions. You can use it to enter quantities or dollar amounts. To enter a quantity, click a number on the keypad and click a sales button. For example, if the patron wants 4 admission tickets, click **4**, and click the sales button for admission. The program adds 4 tickets to the **Order summary**.

To edit a quantity, select it in the **Order summary**, click a number and click **Enter**. For example, the patron wants 8 tickets instead of 4, select the item in the **Order summary**, click **8** and then click **Enter** on the keypad. The number of tickets changes from 4 to 8. You can also select the item in the **Order summary**, click **4**, and click the admission button.

You can also enter dollar amounts for payments and donations. To enter a payment, click the payment amount and click the payment method. For example, to accept a \$50 cash payment, click **5** and **0** and click **Cash**.

To edit a donation amount, click it in the **Order summary**, enter the donation amount, and click **Enter**. For example, if a patron increases a \$1 donation to \$5, select the donation, click **5**, and click **Enter**. The donation amount changes in the **Order summary**.

For information about how to accept payments, see [Accept Payments on page 62](#).

For information about how to edit items in an order, see [Edit Order on page 62](#). [Patron Search on page 17](#)

Search for Patrons

On the Daily Sales screen, you can search for patrons. You can type their name into the **Patron** field or click the magnifying glass to search by entering additional criteria. If you click the magnifying glass, the Patron Search screen appears. In the **Quick search** field, you can search for a specific constituent by first name, last name, phone number, membership card number, and membership lookup ID. For information about how to search for a patron, see [Patron Search on page 17](#). If you cannot find a patron, you can add a patron. For information about how to add a patron, see [Add Patrons on page 20](#).

Edit Order

You can edit items in the **Order summary**. For example, if you select five "Adult" tickets in error when the patron only wanted two, you can edit the number of tickets.

To edit properties such as ticket quantity and donation amounts, select an item from the **Order Summary**. On the keypad, enter the correct amount and click **Enter**. For more information about the keypad see [Daily Sales Keypad on page 61](#).

To edit items such as memberships and preregistered programs, select it from the **Order summary**, and click **Edit**. The corresponding edit screen appears. Make the necessary changes and click **Save**.

Note: When you select tickets for purchase, the program reserves them during the sales process. This prevents the tickets from being sold to another patron. If you reduce the number in an order, those tickets are no longer reserved.

Accept Payments

After you add all items to an order, you can apply payments to the order. You cannot complete the order until you reach a zero balance, or a negative balance in the case of a cash overpayment. After you add payments, the **Order summary** is updated to include payment information such as payment method, amount, total, and change due.

➤ Accept a payment

1. When the patron is ready to pay, review the order and make any necessary changes.
 - If the patron pays with cash, use the quick cash buttons to select the amount paid. If the payment amount is not available, enter the number on the keypad and click **Cash**.
 - If the patron pays the full amount by credit, click **Credit**. The Complete payment screen appears. Swipe or enter the credit card information and click **Save**.
 - If the patron pays a partial amount by credit, click **Partial Credit**. The Add a payment screen appears. Edit the amount, then click **Save** to proceed to Complete payment. Swipe or enter the credit card information and click **Save**.

If required, enter the credit card security code (CSC) in the **CSC** field. For Mastercard, Visa, and Discover cards, the security code is the last three-digits in the signature field on the back of the card. For American Express cards, it is the four-digit code above the account number on the front of the card.

Note: If there is an issue with the payment gateway, you must process the card manually. When you process the card manually, it is processed through an outside vendor. After you process the card, enter the authorization code. You can then save the payment information.

- If the patron pays with check, click **Check**. The Add a payment screen appears. Enter the check date and check number, and click **Save**.
- If the patron pays with a something other than cash, credit, or check, click **Other**. The Add a payment screen appears. Select the payment method, and click **Save**.

2. After you receive payment and return any change due, click **Complete**. Any active marketing surveys appear. For information about marketing surveys, see [Capture Marketing Information on page 63](#). After you complete the surveys, a new sales order appears.
3. To edit payment information, select the payment in the **Order summary**. Click **Delete** and add the payment again.

Remove Sales Items

To remove an item in the order such as a ticket or payment from the order, select it in the **Order summary** and click **Delete**. The program removes the item from the **Order summary**.

Note: You cannot remove some items, such as taxes, from the **Order summary**.

Cancel Orders

If patrons change their minds during the daily sales process, you can cancel the orders and move on to the next patron. To cancel an order in progress on the Daily Sales screen, click **Cancel** in the **Order summary**. The program clears all items in the **Order summary**.

Capture Marketing Information

You may want to capture marketing information such as Zip code for your patrons or have the patron answer a few questions. If you have active marketing surveys they appear after you complete an order. For information about how to activate marketing surveys, see the *Tickets Guide*.

Marketing survey

ZIP/postal code

Country: ▼

ZIP:

Survey questions

Question	Answer
How did you hear about this event?	Friend
Do you read your e-mail daily?	Yes
How many times do you visit a year?	Twice

Declined to respond

➤ Capture marketing survey information

1. After you click **Complete** on the Daily Sales page, the Marketing survey screen appears.
2. Enter the necessary information. If the patron does not want to respond, select **Declined to respond**.
3. Click **Save**. A new sales order appears.

Manage Sales Items

Ticket Sales	66
Sell Tickets for a Daily Admission Program	66
Sell Tickets for a Scheduled or Pre-registered Program	68
Add Tickets for Preregistered Program Screen	73
Sell Combination Tickets	73
Membership Sales	75
Sell New Memberships	76
Sell a Membership Screen	78
Renew, Upgrade, Rejoin, or Activate Memberships in a Sales Order	81
Sell Gift Memberships	81
Sell Membership Add-ons	82
Sell Mid-term Membership Upgrades	82
Apply Cost of Previously Purchased Tickets to Memberships	84
Accept Donations	85
Register for Fundraising Events	86
Sell Merchandise	88
Inventory Items Search	90
Apply Order Discounts and Promotions	90
Common Discount Scenarios	90
Patron Purchases a Membership and Receives a Discount	91
Patron Receives Two Discounts on One Order	91
Patron Provides Two Promotion Codes	91
Apply Discounts and Promotions	91
Discounts and Promotions Screen	94
Manage Order Discounts and Promotions	94
View All Discounts and Promotions Applied to an Advance Sales Order	95
Remove Discounts and Promotions from an Order	95

From the Advance Sales or Daily Sales page, you can add several items to a sales order, such as merchandise, donations, memberships, and tickets or registration for events. You can also apply

discounts and promotions as necessary.

To begin the sales process on the Advance Sales page, you may search for the patron's record. If the patron does not have a record, you can add one during the sales process to complete the transaction. After you select the patron, you can add sales items to the order from the Create order tab.

To sell an item from the Daily Sales page, you must click its button. You can create custom buttons for specific items, such as to quickly register patrons for an event or sell tickets for a scheduled program.

When you click the button to add an item to a sales order, a form may appear so you can select the applicable item to add to the order. For example, when you click a membership button, the Sell a membership screen appears. You can edit its default fields as necessary.

Ticket Sales

From the Advance Sales or Daily Sales page, you can sell tickets for a scheduled programs or daily admissions programs as well as combination tickets. Additionally, you can sell tickets to programs that require registration, or "pre-registered" programs.

Tip: While you do not need to associate the sale of tickets to a patron, we recommend you do so when possible to help track the patron's interests and relationship with your organization.

If the patron prefers a delivery method other than the default, you can select another method. If the purchase is made well in advance, the patron can select to have the tickets mailed to them. If there is not time to mail the tickets, the patron can pick them up at will call. After you determine the delivery method for the tickets, you can accept payments to complete the order.

Note: Scheduled events and pre-registered events are part of a program and require tickets. They are defined on the Tickets page and are different from fundraising events. For information about how to register for an a fundraising event, see [Register for Fundraising Events on page 86](#).

Sell Tickets for a Daily Admission Program

With daily admission programs, there are no specific events. Instead, a patron simply buys tickets to the program. Daily admission programs are commonly used for tickets that are sold all day at any time, such as for museum or aquarium admission.

Warning: For daily sales orders, we recommend you configure buttons on the Daily Sales page for all available admission tickets. To sell an admission ticket for a daily sales order, it must have a button on the Daily Sales page.

After you select the tickets to sell, they appear in the order summary, along with any applicable fees, taxes, and discounts. From the summary you can edit the quantity of tickets selected for purchase or remove tickets and fees from the order.

➤ Add tickets for a daily admission program to an advance sales order

1. From *Sales*, click **Advance sales**. The Advance Sales page appears. A program automatically generates a unique order number, which appears at the top of the page.

Tip: While you do not need to associate the sale of daily admission tickets to a patron, we recommend you do so when possible to help track the patron's interests and relationship with your organization.

2. To associate the order with a patron, on the Select patron tab, search for and select the patron. The patron's name and contact information appear, along with any active constituencies and memberships.

Note: If a record does not already exist for the patron, you can add the patron from the Patron Search screen. Under **Results**, click **Add**. For information about how to add a patron, see [Add Patrons on page 20](#).

Verify with the patron that the primary contact information that appears is correct. To change the information, click **Edit** under **Contact information** and make changes as necessary. For information, see [Edit Primary Contact Information for Patrons on page 22](#).

3. On the Create order tab, select the program for which to add tickets to the sales order.
 - a. In the grid, all programs and events that occur on the current day automatically appear. To select another program, enter filter criteria such as its date or date range and name, and click **Apply**. In the grid, the programs that match the criteria entered appear.
 - b. Select the program the patron wants to attend and, under **Tickets for [Program]**, enter the number of tickets for each price type to add to the order. For example, to sell two adult and three child admission tickets, select the Admission program, and enter **3** for **Adult** and **2** under **Child**.

Note: The events in green text are in progress; events in gray text are sold out or past sell time; and events in black text are available.

4. After you enter the appropriate ticket quantity, click **Add to order**. In the order summary, the selected tickets appear, along with any fees or taxes associated with the tickets.

Note: When you add tickets to a sales order, the program automatically reduces the event availability.

5. Review the order summary with the patron to confirm that the order is correct.
 - To change the quantity of tickets in the order, select the ticket price type in the summary and click **Edit** on the action bar. On the Edit tickets screen, adjust the quantity and click **Save**.
 - To remove tickets or fees from the order, select the ticket price type in the summary and click **Delete** on the action bar.

Tip: In the summary, you can right-click an item to edit or delete it as necessary.

6. Complete the order as necessary.

➤ Add an admission ticket to a daily sales order

1. From *Sales*, click **Daily sales**. The Daily Sales page appears.
2. Click the admission button for the applicable price type. If the patron needs multiple tickets, click the button the appropriate number of times, or enter the quantity on the keypad before you click the button. For example, to add two adult admission tickets, click the adult

admission button twice, or click **2** on the keypad and then click the adult admission button. In the order summary, the tickets appear.

- If you enter the amount in the keypad and then click an admission button, the amount entered appears in the summary.

Tip: To update the quantity of an item added to the order, select it in the summary, enter the amount in the keypad, and click **Enter**. To remove an item from the summary, you can select it in the summary, enter **0** on the keypad, and click **Enter**.

- If you click an admission button and do not use the keypad, the program adds one ticket for each click of the button.
3. Review the order with the patron and make any necessary changes. For information about how to edit the order, see [Edit Order on page 62](#).
 4. Complete the order as necessary.

Sell Tickets for a Scheduled or Pre-registered Program

On the Advance Sales page or Daily Sales page, you can sell tickets to scheduled and pre-registered programs.

- Scheduled programs are events that occur at a defined time, such as a tour or performance.
- Pre-registered programs are scheduled programs that require registration, such as a seminar session or workshop. When you sell tickets for a pre-registered program, you must select a patron. The patron can be the attendee or a “host” registrant who does not attend. For example, John Connor may register his daughters for an art workshop that he does not attend. In this scenario, the daughters are the attending registrants and John Connor is the non-attending registrant on the sales order. In addition to associating a patron with the order, you select price types and enter registration information for the attendees during the sales process. The attendees can be unnamed registrants that are identified only by the selected price types or you can select or add a constituent record for each. Additionally, if registration questions were configured for the event to track things like contact information, meal preference or shirt size, you select the applicable preferences for each registrant.

If your organization has scheduled programs, the **Scheduled Programs** button automatically appears on the Daily Sales page unless you mark it as inactive. With this button, you can add any available scheduled or pre-registered program to a daily sales order. You can also configure buttons for specific scheduled or pre-registered programs and price types and then click these buttons on the Daily Sales page to quickly add tickets to sales orders. For example, you can configure buttons for the Daily Sales page to quickly sell adult tickets for a 2:00 tour or seminar session.

After you select the tickets to sell, they appear in the order summary, along with any applicable fees, taxes, and discounts. From the summary you can edit the quantity of tickets selected for purchase or remove tickets and fees from the order.

➤ Add tickets for a scheduled program to an advance sales order

1. From *Sales*, click **Advance sales**. The Advance Sales page appears. The program automatically generates a unique order number, which appears at the top of the page.

Tip: While you do not need to associate the sale of scheduled program tickets to a patron, we recommend you do so when possible to help track the patron's interests and relationship with your organization.

2. To associate the order with a patron, on the Select patron tab, search for and select the patron. The patron's name and contact information appear, along with any active constituencies and memberships.

Note: If a record does not already exist for the patron, you can add the patron from the Patron Search screen. Under **Results**, click **Add**. For information about how to add a patron, see [Add Patrons on page 20](#).

Verify with the patron that the primary contact information that appears is correct. To change the information, click **Edit** under **Contact information** and make changes as necessary. For information, see [Edit Primary Contact Information for Patrons on page 22](#).

3. On the Create order tab, select the program for which to add tickets to the sales order.
 - a. In the grid, all programs and events that occur on the current day automatically appear. To select another program, enter filter criteria such as its date or date range and name, and click **Apply**. In the grid, the programs that match the criteria entered appear.
 - b. Select the program the patron wants to attend and, under **Tickets for [Program]**, enter the number of tickets for each price type to add to the order. For example, to sell two adult and three child tickets, select the scheduled program, and enter **3** for **Adult** and **2** under **Child**.

Note: The events in green text are in progress; events in gray text are sold out or past sell time; and events in black text are available.

Note: When selling tickets, restricted programs are available to sell only when the patron has an eligible membership.

- Restricted programs become available on the sales screen after you select an eligible member in the **Patron** field, or after you add the required membership to the cart. You will need to click **Apply** or refresh the page to register this change.
- Memberships must be active at the time tickets are purchased, but do not need to be active on the day of the event.

4. After you enter the appropriate ticket quantity, click **Add to order**. In the order summary, the selected tickets appear, along with any fees or taxes associated with the tickets.

Note: When you add tickets to a sales order, the program automatically reduces the event availability.

5. Review the order summary with the patron to confirm that the order is correct.
 - To change the quantity of tickets in the order, select the ticket price type in the summary and click **Edit** on the action bar. On the Edit tickets screen, adjust the quantity and click **Save**.
 - To remove tickets or fees from the order, select the ticket price type in the summary and click **Delete** on the action bar.

Tip: In the summary, you can right-click an item to edit or delete it as necessary.

6. Complete the order as necessary.

➤ Add tickets for a pre-registered program to an advance sales order or with a configured daily sales button

1. To add a ticket to an advance sales order from *Sales*, click **Advance sales**. On the Advance Sales page, search for and select the patron on the Select patron tab. On the Create order tab, search for and select the program, enter the number of tickets to add for each price type, and click **Register**. The Add tickets screen appears.

Note: On the Advance Sales page, the Create order tab automatically displays all programs and events that occur on the current day.

To add a membership to a daily sales order from *Sales*, click **Daily sales**. On the Daily Sales page, search for and select the patron and then click the custom button for the pre-registered program. The Add tickets screen appears. For information about the items on this screen, see [Add Tickets for Preregistered Program Screen on page 73](#).

2. In the **Host** field, the name of the selected patron appears. If you have not already associated a patron with the order, search for and select the patron to pay for the order.

Note: When you sell tickets for a pre-registered program, you must associate a patron with the order. The patron can be an attendee or a "host" registrant who does not attend.

3. Under **Registrants**, enter information about each registrant to attend the pre-registered program. If the patron associated with the order will not attend, remove the patron's name from the first row.
 - a. In the **Price Type** column, select the price type for each attendee. To add a new registrant, select a price type in the next blank row.
 - b. In the **Registrant** column, search for and select the patron record for each attendee. From the search screen, you can add new patrons as necessary. To add an unnamed attendee identified only by the selected price type, leave the column blank.
 - c. In the **Notes** column, enter additional information about each attendee, such as any special needs or requests.
 - d. If registration questions are defined for the program, such as contact information, shirt size or meal choice, enter the answers for each attendee.
4. Click **Save**. You return to the sales order. In the order summary, the selected tickets appear. After you add the tickets to the order, the program automatically reduces the event availability. If the selected tickets are associated with any fees or taxes, they automatically appear in the summary.
5. Review the summary with the patron to confirm that the order is correct.
 - To edit a ticket for a pre-registered program, select it in the summary and click **Edit** on the action bar.
 - To remove tickets or fees from the order, select the item in the summary and click **Delete** on the action bar.
6. Verify delivery information and complete the order as necessary.

Note: After you sell a ticket for a pre-registered program, you can manage the event registrants in different ways, such as to edit registration information or mark registrants as canceled. You can

also print a roster of registrants for a manual check-in process. After the event, you can go to the event record and mark whether registrants attended. For information, see [Manage Registrants for Preregistered Programs on page 261](#).

➤ Add tickets for a scheduled or pre-registered program to a daily sales order

1. From *Sales*, click **Daily sales**. The Daily Sales page appears.

Tip: If you configure a Daily Sales button for a specific scheduled program, click the button to automatically add a ticket to the sales order.

2. Click **Scheduled Programs**. The Select event screen appears.

Note: When selling tickets, restricted programs are available to sell only when the patron has an eligible membership.

- Custom buttons for membership restricted events are disabled and the restricted programs do not appear in the Programs drop-down until you select an eligible member in the **Patron** field, or after you add the required membership to the cart. .
- Memberships must be active at the time tickets are purchased, but do not need to be active on the day of the event.

3. Select the date of the scheduled program and its name and start time.
4. For a scheduled program, under **Ticket options**, specify the price type and quantity of the tickets.

Tip: You can only sell one price type for a scheduled program ticket at a time. To sell multiple price types, such as both adult and child tickets, add tickets for each price type separately.

For a pre-registered program, in the **Host** field, the name of the selected patron appears. If you have not already associated a patron with the order, search for and select the patron to pay for the order.

Time:

Ticket options

Host:

Registrants (2)

	Price type	Patron	Notes
	Adult	Melissa C. Elzy	
	Child		Requires a dance...
*			

Capacity available: 500

Help Save Cancel

Note: When you sell tickets for a pre-registered program, you must associate a patron with the order. The patron can be an attendee or a "host" registrant who does not attend.

Under **Registrants**, enter information about each registrant to attend the pre-registered program. If the patron associated with the order will not attend, remove the patron's name from the first row.

- a. In the **Price Type** column, select the price type for each attendee. To add a new registrant, select a price type in the next blank row.
 - b. In the **Patron** column, search for and select the patron record for each attendee. From the search screen, you can add new patrons as necessary. To add an unnamed attendee identified only by the selected price type, leave the column blank.
 - c. In the **Notes** column, enter additional information about each attendee, such as any special needs or requests.
 - d. If registration questions are defined for the program, such as contact information, shirt size or meal choice, enter the answers for each attendee.
5. Click **Save**. You return to the sales order. In the order summary, the selected tickets appear.

Note: To edit the ticket for a scheduled program, you must delete the ticket and add it again. To delete a ticket from the order, select it in the summary and click **Delete** on the action bar. To edit a ticket for a pre-registered program, select it in the summary and click **Edit** on the action bar.

6. Complete the order as necessary.

Add Tickets for Preregistered Program Screen

When you sell tickets for a preregistered program event, you access this screen to select price types and preferences for the attendees. The attendees can be unnamed registrants that are identified only by the selected price types or you can select or add a constituent record for each. Additionally, you can add registration information that was set up on the program or program event such as contact and personal information. For information about how to access this screen, see [Sell Tickets for a Scheduled or Pre-registered Program on page 68](#).

Screen Item	Description
Host	<p>For a pre-registered program ticket sale, a patron record is required. This field automatically displays the patron associated with the order.</p> <p>If you have not yet associated a patron with the order, search for and select the patron to pay for the order. From the search screen, you can add a new patron if necessary.</p> <p>This patron also appears in the first row under Registrants as an attendee.</p>
Registrants	<p>Under Registrants, you enter information each attendee. To add additional registrants, click Add registrant.</p> <p>In the Price Type field, select the price type for each attendee's ticket.</p> <p>In the Registrant field, enter or search for and select the patron record for each attendee. To add an unnamed attendee identified only by the price type, leave this column blank.</p> <p>In the Notes field, enter any additional information about each attendee, such as special needs or requests.</p> <p>If you defined registration questions for the program, such as contact information, shirt size or meal choice, under Registration information, enter at least the required information indicated by an asterisk (*). The second column is for text responses such as name and address and the third column is for responses that require a selection such as t-shirt size and meal preference.</p>

Sell Combination Tickets

On the Advance Sales or Daily Sales page, you can add a combination ticket to a sales order. For example, your organization may offer a Triple Bundle combination that includes an admission ticket, an IMAX movie showing, and a walking tour.

- When you add combination tickets to an advance sales order, you select the combination and specify which program group and the number of tickets for each price type the patron wants to purchase.
- To add combination tickets to a daily sales order, you must first configure a Daily Sales page button for the combination. When you add combination tickets to a daily sales order, you click the button for the combination and specify which program group and the number of tickets for each price type the patron wants to purchase.

After you add a combination, it appears in the order summary, along with any fees or taxes. You can edit the number of tickets to purchase or remove the combination and fees from the order.

➤ Add a combination ticket to an advance sales order

1. From *Sales*, click **Advance sales**. The Advance Sales page appears. The program automatically generates a unique order number, which appears at the top of the page.

Tip: While you do not need to associate the sale of combination tickets to a patron, we recommend you do so when possible to help track the patron's interests and relationship with your organization.

2. To associate the order with a patron, on the Select patron tab, search for and select the patron. The patron's name and contact information appear, along with any active constituencies and memberships.

Note: If a record does not already exist for the patron, you can add the patron from the Patron Search screen. Under **Results**, click **Add**. For information about how to add a patron, see [Add Patrons on page 20](#).

Verify with the patron that the primary contact information that appears is correct. To change the information, click **Edit** under **Contact information** and make changes as necessary. For information, see [Edit Primary Contact Information for Patrons on page 22](#).

3. On the Create order tab, select the combination to add to the sales order.
 - a. In the grid, all programs and events that occur on the current day automatically appear. To select another program, enter filter criteria such as its date or date range and name, and click **Apply**. In the grid, the programs that match the criteria entered appear.
 - b. Select the combination the patron wants to purchase and, under **Tickets for [Program]**, enter the number of tickets for each price type to add to the order. For example, to sell two adult and three child tickets, select the combination, and enter **3** for **Adult** and **2** under **Child**.
4. After you enter the appropriate ticket quantity, click **Add to order**. The Select tickets screen appears. Review and edit the information as necessary.

Note: The program groups in green are currently selected; groups in yellow have conflicts with the currently selected programs; and groups in gray are available for selection. If only one group is available, it is automatically selected. If no groups exist, the message "No programs found" appears.

- a. To select a different date or time for the combination, click **Change times**. On the Make selections screen, select the desired date and time under **Program groups** and click **OK**.

- b. Under **Select price types**, use the up or down arrows to adjust the number of tickets for each price type as necessary.
5. Click **Save**. You return to the sales order. In the order summary, the selected combination tickets appear.
6. Review the order summary with the patron to confirm that the order is correct.
7. Complete the order as necessary.

➤ Sell a combination ticket

1. From *Sales*, click **Daily sales**. The Daily Sales page appears.
2. Click the custom combination button. The Select tickets screen appears.
3. Review the date and time of the selected combination. To select a different date or time:

Note: The program groups in green are currently selected; groups in yellow have conflicts with the currently selected programs; and groups in gray are available for selection. If only one group is available, it is automatically selected. If no groups exist, the message "No programs found" appears.

- a. Click **Change times**. The Make selections screen appears.
- b. Under **Program groups**, select the desired date and time.
- c. Click **OK**. You return to the Select tickets screen.
4. Under **Select price types**, use the up or down arrows to adjust the number of tickets for each price type as necessary.
5. Click **Save**. You return to the sales order. In the order summary, the selected combination tickets appear.
6. Review the order summary with the patron to confirm that the order is correct.
7. Complete the order as necessary.

Membership Sales

On the Advance Sales page or Daily Sales page, you can sell new memberships, renew existing memberships, and rejoin canceled or lapsed memberships. You can also enroll members in auto-renewals and sell gifts of membership so patrons can purchase memberships for other patrons. Additionally, if a pending membership exists for a patron, that membership can be activated during any membership sales process.

Tip: You can apply the cost of previously purchased tickets to a membership. For information about how to apply the cost of tickets to a membership, see [Apply Cost of Previously Purchased Tickets to Memberships on page 84](#).

Sell New Memberships

On the Advance Sales or Daily Sales page, you can add new memberships for patrons who have not previously been a member of the membership program. Patrons can purchase their own memberships or purchase gifts of membership for other patrons. Gift memberships can be for new memberships, membership renewals, or activations of pending memberships. The recipient of a gift membership must have a patron record. You can add patron records for gift recipients during the sales process as necessary. For information about how to sell a gift of membership, see [Sell Gift Memberships on page 81](#).

Tip: You can renew, rejoin, activate, or upgrade an existing membership directly from the Advance Sales page or Daily Sales page. You can also enroll the member in automatic renewals. If a patron is already a member, you can view and manage the patron's memberships from the constituent record, such as to renew or upgrade a membership. You can also view additional information about a specific membership on the membership record. For information about how to manage an existing membership for a sales order, see [Renew, Upgrade, Rejoin, or Activate Memberships in a Sales Order on page 81](#).

To quickly add memberships to daily sales orders, you can create custom buttons to appear on the Daily Sales page for specific membership programs, levels, and terms. When you click a custom membership button, the applicable membership program, level, and term automatically appear on the Sell a membership screen so you can quickly complete the transaction. On the Members tab, the patron associated with the sales order also automatically appears. If you have not yet associated a patron with the sales order when you click the custom button, a search screen appears so you can search for and select the patron who pays for the order.

➤ Add a membership or a gift of membership to a sales order

1. To add a membership to an advance sales order, from *Sales*, click **Advance sales**. On the Advance Sales page, search for and select the patron who pays for the order and then, on the Create order tab, click **Membership**. The Action screen appears.

To add a membership to a daily sales order, from *Sales*, click **Daily sales**. On the Daily Sales page, search for and select the patron who pays for the order and then click **Memberships**. The Action screen appears.

2. Select whether to add a membership join or a gift of membership to the sales order.
 - To add a membership join, click the **Join** button for the applicable membership program.
 - To add a gift of membership, click **Give a membership**, search for and select the patron to receive the membership, and then click the **Give** button for the applicable membership program.

The Sell a membership screen appears and displays the applicable membership program.

Sell a membership
✕

Adopt an animal - Penguin (1 year(s))
 Join - Price: \$100.00

Level:
 Term:
 Expiration:
 Type:

Total members allowed: 1
 No. of children:
 Comments:

Make this not a gift

Add-ons
 Add 1 members: 1

Members
Member cards

✔ Make primary
 ✕ Delete

Name	Type
Douglas Abrahms	Primary

This membership is a gift

Given by:

Send renewal notice to:

? Help

3. Select the level and term of the membership to add to the order.
4. In the **No. of children** field, enter the total number of child memberships to include in the membership.
5. The **Expiration** field displays the expiration date of the membership, based on the selected program and term. Edit the expiration date as necessary.
6. In the **Comments** field, enter any additional information about the membership or its members.
7. If the membership program is enabled for auto-renewals, you can select **Renew this membership automatically when it expires. (Credit card required)** to enroll the member. They must pay for the current memberships with a credit card — this card will be held on file and charged automatically for renewal payments.
8. For a membership program with types, select the type to apply to the membership as necessary.

Note: Types apply only to membership programs created before the Q1 2012 release.

9. If the membership program allows add-ons such as guest passes or other benefits, the **Add-ons** button appears. To include an add-on with the membership, click this button. For

information about how to add an add-on to the sales order, see [Sell Membership Add-ons on page 82](#).

10. On the Members tab, search for and select the patrons to include as members on the membership.

If you include multiple members, to select another member as the primary, select the member's row in the grid and click **Make primary** on the action bar.

Note: For a membership join, the patron associated with the sales order automatically appears as the primary member. For a gift of membership, the gift recipient automatically appears as the primary member.

Tip: To delete a member from the membership, such as if you accidentally add the incorrect patron as a member, select the member's row in the grid and click **Delete** on the action bar.

11. To add the membership as a gift of membership for another patron:

- a. If necessary, select **This membership is a gift** or click **Make this a gift**.
- b. In the **Given by** field, the patron associated with the sales order appears. To select another patron as the giver, select the member who gives the membership, or search for and select the patron who gives the membership.
- c. Select whether to send renewal notices to the giver, the primary member, or both. If the patron chose to auto-renew the membership, all renewal notices are sent to the giver not the recipient.

Tip: If you mistakenly add a membership join as a gift of membership, you can click **Make this not a gift** or deselect **This membership is a gift** to add the membership as a join.

12. On the Member cards tab, the members to receive membership cards appear. For each member, edit the name and expiration date to appear on the card as necessary.

Tip: To remove a member from the list, such as to not create a membership card for the member, select the member's row in the grid and click **Delete** on the action bar.

13. Click **Save**. You return to the sales order and the membership appears in the order summary.

Note: Memberships are not eligible for per item fees. Additionally, memberships are non-taxable items.

14. Review the summary with the patron to confirm that the order is correct.

- To edit the options you select when you add a membership to the order, select it in the summary and click **Edit**. The Edit membership screen appears, and you can edit membership options as necessary.
- To remove the membership from the order, select it in the summary and click **Delete**.

15. Complete the sales order as necessary.

Sell a Membership Screen

The table below explains items on the Sell a membership screen. For information about how to access this screen, see [Sell New Memberships on page 76](#).

Screen Item Description

Membership	<p>At the top of the screen, the selected membership program, level, and term appear, along with the applicable expiration date and price.</p> <p>For a new, rejoined, or activated membership, the program calculates the expiration date from the transaction date. For a renewed membership, the program includes any time remaining on membership to calculate the new expiration date. For example, if a member renews an annual membership three months early, the renewed membership will not expire for 15 months.</p> <p>To edit the membership program, click Cancel to return to the Daily Sales page.</p>
Level	Select the appropriate membership program level. Membership levels define the requirements related to the membership, such as terms, dues amounts, number of members, and renewal credentials.
Term	Select the term for the membership. The term determines the duration and price of the membership and is based on the selected program and level. After you select a term, the price appears.
Expiration	<p>This field displays the expiration date of the membership, based on the selected program and term. Edit the expiration date as necessary.</p> <p>For a new, rejoined, or activated membership, the program calculates the expiration date from the transaction date.</p> <p>For a renewed membership, the program includes any time remaining on membership to calculate the new expiration date. For example, if a member renews an annual membership three months early, the renewed membership will not expire for 15 months.</p>
Type	<p>For a membership program that includes types, this field appears. If your organization uses types to further define program levels, select the type of membership to add to the order. For example, natural history museums may set up types based on certain animals so patrons can select which animal they want to be associated with.</p> <p>Types apply only to membership programs created before the Q1 2012 release.</p>
No. of children	Enter the number of children to include in the membership. The number cannot exceed the number of children allowed for the membership level.
Comments	Enter any additional information about the constituent for the membership.

Screen Item Description

Renew this membership automatically when it expires. (Credit card required)	Select this option to enroll the patron in automatic membership renewals.
Make this a gift or This membership is a gift	<p>To change a standard membership join to a gift of membership, click Make this a gift or select This membership is a gift on the Members tab.</p> <p>To change of gift of membership to a standard membership join, click Make this not a gift or deselect This membership is a gift.</p>
Renew this membership automatically when it expires. (Credit card required)	If the membership program is enabled for auto-renewals, this option appears. to enroll the member. If the patron chooses to enroll in auto-renewals, they must pay for the current memberships with a credit card — this card will be held on file and charged automatically for renewal payments.
Add-ons	If the membership program allows members to purchase add-ons such as benefits or temporary additional members, this button appears. To include an add-on in the membership transaction, click this button. For information about how to add an add-on, see Sell Membership Add-ons on page 82 .
Members	<p>On this tab, search for and select the members to include in the membership. For a membership join, the patron attached to the order automatically appears in the grid as the primary member. For a gift of membership, the gift recipient automatically appears. You can add or remove members as necessary, as long as they are allowed by the membership.</p> <p>To designate a member as the primary member, select its row in the grid and click Make primary on the action bar.</p> <p>For a gift of membership, in the Given by field, the patron associated with the sales order automatically appears. To designate another patron as the giver, select the applicable member or search for and select the patron. In the Send renewal notice to field, select whether to send renewal notices to the primary member, the giver, or both.</p>
Membership cards	On this tab, select the members to receive membership cards. For each selected member, adjust the name and expiration date to appear on the card as necessary.

Renew, Upgrade, Rejoin, or Activate Memberships in a Sales Order

During the sales process, a patron may want to renew or upgrade an existing membership, rejoin a previously canceled or lapsed membership, or activate a pending membership. When you select a patron for an advance sales or daily sales order, all memberships for the patron appear with buttons to applicable to the membership.

Tip: On the Advance Sales page, all memberships for the patron appear under **Memberships**. On the Daily Sales page, click the patron's name to view all memberships.

- **Renew** appears for active memberships or memberships in the renewal window.
- **Rejoin** appears for lapsed or canceled memberships.
- **Activate** appears for pending memberships.

To add a renewal or rejoin to the sales order, click the applicable button next to the membership. To add a mid-term upgrade, you must access the constituent's Memberships tab or membership record. For more information about how to upgrade members, see [Mid-term Membership Upgrade](#).

Tip: If a lapsed member wants enroll in auto-renewals when they rejoin, select the membership in the cart and click **Edit**. On the Edit membership screen, select **Renew this membership automatically when it expires. (Credit card required)**.

Note: For information about how to renew, rejoin, or activate memberships as a gift for another patron, see [Sell New Memberships on page 76](#).

Sell Gift Memberships

Patrons can purchase their own memberships or purchase gifts of membership for other patrons. Gift memberships can be for new memberships, membership renewals, or activations of pending memberships.

Note: The recipient of a gift membership must have a patron record. If no record currently exists for the recipient, click **Add** on the search screen to create the record.

- To add a gift membership to an advance sales order from *Sales*, click **Advance sales**. On the Advance Sales page, search for and select the patron purchasing the gift of membership. On the Create order tab, click **Memberships**, select **Give a membership**, search for and select the gift recipient, and then select which membership program to give as a gift.
- To add a gift membership to a daily sales order from *Sales*, click **Daily sales**. On the Daily Sales page, search for and select the patron purchasing the gift of membership and then click **Memberships**. On the Action screen, click **Give a membership**, search for and select the gift recipient, and then select which membership program to give as a gift.

After you select the recipient and membership program, the Sell a membership screen appears so you can complete the membership sale. On the Members tab, **This membership is a gift** appears selected. For a gift of membership, you can specify which patron to designate as the giver and select whether to

send renewal notices to the primary member, the giver, or both. For information about the items on the Sell a membership screen, see [Sell a Membership Screen on page 78](#).

Tip: If you mistakenly add a gift of membership as a membership join, on the Sell a membership screen, click **Make this a gift** or select **This membership is a gift** to add the membership as a gift.

Sell Membership Add-ons

When your organization sets up a membership program, it may select to allow members to purchase add-ons such as guest passes to accommodate visiting family or friends. When you add a membership to a sales order and the selected membership program allows add-ons, the **Add-ons** button appears on the Sell a membership screen so you can include add-ons to the membership transaction. When you click this button, the Add-ons screen for the selected membership program appears.

Item	Price	Quantity
<input checked="" type="checkbox"/> Guest	\$4.00	1

Total add-on amount: \$4.00
Total additional members: 1

OK Cancel

In the grid, the add-ons set up for the membership program appear. To add an add-on to the sales order, select its checkbox and enter its quantity. The **Total add-on amount** field displays the total cost of the add-ons. To return to the Sell a membership screen and complete the transaction, click **OK**.

Sell Mid-term Membership Upgrades

If applicable, patrons can upgrade their memberships to a higher membership level in the middle of the current term. The cost of the upgrade is the difference in the price of the two levels. For example,

the Aquarium Standard membership costs \$100 to join, and the Aquarium Gold membership costs \$250. The price of the membership upgrade is \$150.

When a membership is upgraded in the middle of the term, the expiration date does not change. Members also receive the benefits of the level to which they upgrade.

Note: Mid-term upgrades apply only to membership programs with multiple levels for patrons to join. Patrons must currently have a valid membership, and a higher level of membership must exist on the membership program.

➤ Add a mid-term membership upgrade to an advance sales order

1. From *Sales*, click **Advance sales**. The Advance Sales page appears.
2. On the Select patron tab, search for and select the patron purchasing the order. After you select a patron, information about the patron's existing memberships appear.
3. On the Create Order tab, click **Memberships** and select **Mid-term upgrade**. The Add mid-term upgrade screen appears.
4. In the **Membership to upgrade** field, select the membership program to upgrade. If the patron has multiple membership programs, only those eligible for an upgrade appear.

Note: The price of the upgrade appears next to each membership level listed.

5. In the **Level** field, select the level to which to upgrade the membership.
6. Click **Save**. You return to the sales order and the membership upgrade appears in the order summary.
7. If the new level allows multiple members to exist on the program, add members as necessary.
 - a. In the order summary, select the mid-term upgrade and click **Edit**. The Edit membership screen appears.
 - b. Under **Members**, enter the name or names of the members to add to the membership program.
 - c. Under **Membership cards**, enter the name and expiration date to appear on the membership cards for each member.
 - d. Click **Save**. You return to the sales order.

Note: To remove the mid-term upgrade from the order, select it in the summary and click **Delete**.

8. Complete the order as necessary.

➤ Add a mid-term membership upgrade to a daily sales order

1. From *Sales*, click **Daily sales**. The Daily Sales page appears.
2. Search for and select the patron purchasing the order. After you select a patron, information about the patron's existing memberships appears. To view information about multiple memberships, click the patron's name.
3. Click **Mid-term upgrade**. Buttons for each membership level to which the patron can upgrade appear.

4. Click the button for the mid-term membership upgrade to add to the order. The mid-term upgrade appears in the order summary.
5. If the new level allows multiple members to exist on the program, add members as necessary.
 - a. In the order summary, select the mid-term upgrade and click **Edit**. The Edit membership screen appears.
 - b. On the Members tab, enter the name or names of the members to add to the membership program.
 - c. On the Membership cards tab, enter the name and expiration date to appear on the membership cards for each member.
 - d. Click **Save**. You return to the sales order.

Note: To remove the mid-term upgrade from the order, select it in the summary and click **Delete**.

6. Complete the order as necessary.

Apply Cost of Previously Purchased Tickets to Memberships

If a patron purchases tickets and then purchases a membership, you can apply the cost of the previously purchased tickets to the membership. For example, if a patron purchases admission tickets for \$20 and then becomes a member, you can apply the \$20 to the membership. You can also specify an amount other than the cost of the tickets.

➤ Apply the cost of previously purchased tickets to a membership

1. From *Sales*, add the membership to an advance sales order or a daily sales order. For information about how to sell a membership, see [Sell New Memberships on page 76](#).
2. In the order summary, select the membership and click **Apply tickets**. The Apply tickets to a membership screen appears.
3. In the **Order number** field, search for and select the order with the tickets to apply to the membership. For information about the order search, see [Search for Orders on page 240](#).
4. Select the tickets to apply. Click the checkbox in the header to select all tickets.

Note: You cannot apply tickets greater than total of the order. The program automatically adjusts the tickets and amounts to apply for you. However, we recommend, you review the changes.

5. The **Amount to apply** field defaults the final cost of a ticket. Edit the amount to apply as necessary.

Note: You cannot apply an amount greater than the original price of the ticket.

6. Click **Save**. You return to the sales order. In the summary, the amount applied to the membership appears.

Accept Donations

On the Advance Sales page or Daily Sales page, you can add donations to a sales order along with other purchases. For example, a patron can buy tickets to an event, purchase a membership, and donate to your organization all in a single transaction.

Warning: To accept donations through the Daily Sales page, you must first set up donation buttons on the Daily Sales page.

➤ Add a donation to an advance sales order

1. From *Sales*, click **Advance sales**. The Advance Sales page appears.
2. On the Select patron tab, search for and select the patron purchasing the order.
3. On the Create Order tab, click **Donation**. The Add a donation screen appears.
4. Enter the total donation amount and then search for and select the designation to apply the donation toward. If you configure a default point of sale donation, its default amount and designation automatically appear.
5. Click **Save**. You return to the Advance Sales page. In the order summary, the donation amount and designation appear.
6. Review the summary with the patron to confirm the order is correct.
 - To change the donation amount or designation, select the donation in the summary and click **Edit** on the action bar. The Edit donation screen appears. Edit the information as necessary and click **Save**.
 - To remove the donation from the order, select it in the summary and click **Delete** on the action bar.

Tip: In the summary, you can right-click an item to edit or delete it as necessary.

7. Complete the order as necessary.

➤ Add a donation to a daily sales order

1. From *Sales*, click **Daily sales**. The Daily Sales page appears.
2. Click the button for the donation to add to the order. In the summary, the configured donation amount and designation appear.

Tip: To donate more than the configured amount, enter the donation amount in the keypad before you click the donation button. For example, if you configure a donation button for \$25 and the patron wants to donate \$30, enter 30 on the keypad and then click the donation button. A \$30 donation appears in the summary.

3. Review the summary with the patron to confirm the order is correct.
 - To edit the donation amount, select the donation in the summary and enter the amount in the keypad.

- To remove the donation from the order, select it in the summary and click **Delete** on the action bar.
4. Complete the order as necessary.

Register for Fundraising Events

During the sales process, you can register patrons for fundraising events and accept payments toward existing registrations. Registrants include the event's attendees, players, coordinators, instructors, vendors, other businesses that supply services or products for the event, or any other person involved with the event. Usually, a member of the development office sets up fundraising events.

For daily sales orders, you can configure buttons for specific fundraising event registrations and then click these buttons on the Daily Sales page to quickly add the registrations to sales orders. For example, you can configure a button for the Daily Sales page to quickly sell registrations for an upcoming tennis tournament.

➤ Add an event registration to a sales order

1. To add an event registration to an advance sales order from *Sales*, click **Advance sales**. On the Advance Sales page, search for and select the patron and then, on the Create order tab, click **Event registration**.

To add an event registration to a daily sales order from *Sales*, click **Daily sales**. On the Daily Sales page, search for and select the patron and then click **Event registration** or a custom registration button.

The Add an event registration screen appears. For a daily sales order, if you click a custom membership button, information about the selected event automatically appears. In the **Registrant/Guest** field, the selected patron appears. Under **Registrations**, any existing registrations for the patron appear.

Add an event registration

Registrant/Guest:

Event:

Include \$0.00 registrations

Registrations (4 records found)

	Registrant	Event	Date	Balance	Amount
<input type="checkbox"/>	Melissa C. Elzy	Spring Ball	4/7/2007	\$40.00	\$0.00
<input checked="" type="checkbox"/>	Melissa C. Elzy	Afternoon Tea	6/24/2006	\$75.00	\$0.00
<input type="checkbox"/>	Melissa C. Elzy	Starlight Concert	8/25/2007	\$30.00	\$0.00
<input type="checkbox"/>	Melissa C. Elzy	CPR Training Session	7/10/2004	\$150.00	\$0.00

Note: You cannot add zero dollar registrations to an order, but you may edit the registration.

2. To display zero-dollar registrations, select **Include \$0.00 registrations**.
3. Select the event registration to add to the sales order.
 - To add an existing event registration, select its checkbox under **Registrations**. By default, the full balance amount of the registration appears in the **Amount** column. Edit the amount to add to the order as necessary.
 - To register the patron for an event, in the **Event** field, search for the event to which to add the registration and then click **Add** under **Registrations**. The Add a registrant screen appears so you can complete the registration. When you save the registration, you return to the Add an event registration screen. Under **Registrations**, the new registration appears selected.
 - If the patron wants to pay for another registrant's registration, click **Clear**, enter the registrant or event associated with the registration, and click **Search**. Under **Registrations**, all registrations that match the search criteria appear. Select the registration to add and edit its amount to add to the order as necessary.

Tip: You can edit an event registration as necessary. Under **Registrations**, select the registration to edit and click **Edit**.

4. Click **Add to order**. You return to the sales order. In the order summary, the event registration appears.
5. Review the summary with the patron to confirm that the order is correct.
 - To change the event registration in the order, select it in the summary and click **Edit**. The Edit registration screen appears, and you can make changes as necessary.

- To remove the event registration from the order, select it in the summary and click **Delete**.

Tip: You can right-click on an event registration in the summary to quickly edit or delete the item.

6. Complete the order as necessary.

Note: For events that allow designations on fees, payments must be for the full amount of the registration.

➤ Add an event registration to a daily sales order with a configured button

1. From *Sales*, click **Daily Sales**. The Daily Sales page appears.
2. Click the configured event registration button. The Add a registrant screen appears.
3. Complete the registration and click **Save**. You return to the sales order. In the order summary, the event registration appears.
4. Review the summary with the patron to confirm that the order is correct.
 - To change the event registration in the order, select it in the summary and click **Edit**. The Edit registration screen appears, and you can make changes as necessary.
 - To remove the event registration from the order, select it in the summary and click **Delete**.

Tip: You can right-click on an event registration in the summary to quickly edit or delete the item.

5. Complete the order as necessary.

Note: For events that allow designations on fees, payments must be for the full amount of the registration.

Sell Merchandise

On the Advance Sales page or Daily Sales page, you can add merchandise items such as apparel or souvenirs to a sales order. Before you can sell a merchandise item, it must first appear in your inventory.

If the merchandise is taxable and you configure the applicable taxes, the program automatically applies these taxes to the sales order after you add the merchandise to the order. Additionally, if merchandise can be discounted, you can manually apply valid discounts and apply any promotion code discounts presented by the patron after you add the merchandise. Any discounts and promotions configured to apply automatically appear in the order summary and recalculate the price of the order as you add items.

➤ Sell merchandise items

1. To add merchandise items to an advance sales order from *Sales*, click **Advance sales**. On the Advance Sales page, select the Create order tab and click **Merchandise**. The Sell merchandise items screen appears.

To add merchandise items to a daily sales order from *Sales*, click **Daily sales**. On the Daily Sales page, click **Merchandise**. The Sell merchandise items screen appears.

Sell merchandise items

SKU/UPC: 🔍

Quantity: Update Quantity

Remove all			
Blue whale T-shirt - Small			
SKU/UPC: SKU010000001	Quantity: 1	Remove	
Unit price: \$15.00	Price: \$15.00		
Blue whale T-shirt - Large			
SKU/UPC: SKU010000003	Quantity: 1	Remove	
Unit price: \$15.00	Price: \$15.00		

Help Save Cancel

Tip: While you do not need to associate the sale of merchandise to a patron, we recommend you do so when possible to help track the patron's interests and relationship with your organization.

2. In the **SKU/Barcode** field, search for and select each merchandise item to add, or enter or scan each item's stock-keeping unit (SKU) or barcode. For information about the Inventory Items Search screen, see [Inventory Items Search on page 90](#).

Tip: By default, each item appears with a quantity of 1. If you scan multiples of an item, the quantity for the item automatically updates in the grid. Additionally, you can enter the quantity in the **Quantity** field before you enter or scan the item. For example, to add two T-shirts, you can enter a quantity of 2 and then add the T-shirt to the order.

Note: This screen displays the standard prices for each item and does not include any applicable discounts or promotions. When you save the merchandise to the order, the order summary updates the prices with any discounts or promotions.

3. To adjust the quantity of an item, such as to sell multiples or to remove a duplicate accidentally added to the order, select the item in the grid, enter the quantity to sell in the **Quantity** field, and click **Update Quantity**. For example, to sell two of the same T-shirt, enter the T-shirt one time and update its quantity to "2."

Tip: To completely remove the total quantity of an item from the order, click **Remove** in its row in the grid. To quickly remove all items from the order, click **Remove all** on the action bar.

4. Click **Save**. You return to the sales order. In the summary, the merchandise items appear.
5. Complete the order as necessary.

Inventory Items Search

On the Inventory Items Search screen, you can search the inventory for merchandise items. For example, to sell a Whale T-shirt, your organization must first create an inventory item for the T-shirt.

When you search for an inventory item, you can search by criteria such as name, category, and stock-keeping unit (SKU) or barcode. After you enter your search criteria, click **Search**. Under **Results**, all items that match the criteria enter appear. To select an item, such as to add to a sales order, click its row in the grid.

Apply Order Discounts and Promotions

From the Advance Sales or Daily Sales page, you can apply discounts and promotions to reduce the price of the purchase prior to payment. You can apply valid manual discounts and promotions, and apply promotion code discounts and promotions if presented by the patron. Any discounts and promotions configured to apply automatically appear in the order summary and recalculate the price of the order as items are added to the cart.

Tip: If your organization configures manual discounts or promotions, the **Discounts and promotions** button appears on the Daily Sales page. To apply a discount or promotion to a daily sales order, you can click this button. We recommend your organization also configure buttons on the Daily Sales page for the most common discounts and promotions. For example, if you offer a buy one ticket or merchandise item, get one free discount, you can configure a “Buy One, Get One” button to quickly access the discount during a daily sales order.

If you have security rights, you can also enter adjustable discounts at your discretion. For example, you can apply a 10 percent discount to an order for an unsatisfied customer, or take \$10 off an event that is already in progress.

If you apply multiple discounts and promotions to an order, the program evaluates the order and selects the discount, or discounts, that provide the greatest value for the patron. The program runs two separate evaluations on discounts and promotions: one on discounts and promotions that apply to individual items within the order, and one on discounts and promotions that apply to the price of the entire order. Since the program treats discounts and promotions that apply to individual items and discounts and promotions that apply to the entire order as separate calculations, it can select more than one discount or promotion to reduce the price of purchase.

After you apply discounts and promotions prior to payment, you can see a separate view of all applied discounts and promotions, including those not selected for use by the program. You can also remove any manual or promotion code discounts and promotions applied to the order as necessary, such as if you enter the wrong promotion code and apply the incorrect discount, or if you select the AAA manual discount rather than the AARP discount.

Common Discount Scenarios

At any given time, you may have many discounts active in the program that are configured to apply to purchases in different ways. Discounts can apply automatically to orders and items or when a valid

promotion code is presented, or the ticket seller can manually apply discounts when the order is placed. Discounts may be restricted to patrons with certain memberships, constituencies, and addresses, or restricted to specific programs, merchandise departments, sales methods, and purchase days, dates, and times. The program automatically determines which discounts are valid and applies the discounts that provide the greatest value to the patron. The following scenarios provide examples of how the program selects and applies discounts to purchases.

Patron Purchases a Membership and Receives a Discount

Michael Adamson is a regular at the Sea Life Museum. He visits every Tuesday with a friend for the Two for Tuesday discount to receive two dollars off each adult admission. Since Michael visits the museum so often, he decides to purchase a one-year Friends of the Museum membership along with his admission tickets. With his membership, he receives a discount of two tickets for the price of one, which replaces the Two for Tuesday discount since it is of greater value. If Michael then decides he does not want the membership, when the ticket seller removes the membership from the order, the program removes the membership discount and instead applies the original Two for Tuesday discount.

Patron Receives Two Discounts on One Order

Your organization configures a discount that provides two dollars off tickets purchased to the Sea Turtles lecture, as well as any merchandise purchased, with the presentation of a AAA membership card. You also configure a discount that automatically provides 10% off of entire orders during the month of July. Susan McDonald purchases four tickets to the lecture and four T-shirts and receives 10% off of her order. She then remembers to present her AAA card and receives two dollars off of the original price of each ticket and merchandise item. The 10% discount then recalculates the price of the order based on of the discounted ticket and item prices.

Patron Provides Two Promotion Codes

Julie Andrews listens to radio station Q107.5 and hears an advertisement that visitors to the Modern Art Gallery receive two dollars off of each admission ticket purchased upon mention of the radio station. She also knows that the local news station has a similar promotion if she mentions "News 24" when she purchases her tickets, but is unsure of the value of the discount. At the art gallery, Julie provides both promotion codes, and the ticket seller enters them both into the order. The program then calculates the potential value of both promotion codes and applies the discount with the greater value.

Apply Discounts and Promotions

From the Advance Sales or Daily Sales page, you can apply discounts and promotions to reduce the price of the purchase prior to payment. You can apply manual discounts and promotions as the only discount on a purchase or along with multiple discounts. For example, when a patron purchases three tickets to the Sea Turtles lecture, she presents an AAA membership card to receive a discount that takes \$1 off of each ticket. Along with the manual AAA membership card discount, another discount has already been configured to automatically reduce all orders during the month of July by 10%. After the

program calculates both discounts, it applies the \$1 AAA membership card discount to each ticket and then reduces the total price of the order by an additional 10%.

You can apply promotion code discounts and promotions when the patron presents a valid code. You can apply promotion code discounts as the only discount on a purchase or along with multiple discounts. For example, when a patron purchases three tickets to the Sea Turtles lecture and three Sea Turtle T-shirts, he presents a valid promotion code discount that takes \$1 off of each ticket and each merchandise item. Along with the promotion code discount, another discount has already been configured to automatically reduce all orders during the month of July by 10%. After the program calculates both discounts, it applies the \$1 promotion code discount to each ticket and merchandise item and then reduces the total price of the purchase by an additional 10 percent.

If you have security rights, you can also enter adjustable discounts at your discretion. For example, you can apply a 10 percent discount to an order for an unsatisfied customer, or take \$10 off an event that is already in progress.

Note: If a membership promotion is configured to **Restrict this promotion to automatically renewing membership programs (Applies to first payment only, not future renewal payments)**, it can only be applied to auto-renewing memberships.

➤ Apply a discount or promotion

1. To apply a discount or promotion to an advance sales order from *Sales*, click **Advance sales**. On the Advance Sales page, select the Create order tab, click **Discounts and promotions**, and select **Apply discount or promotion**. The Discounts and promotions screen appears.

To apply a discount or promotion to a daily sales order from *Sales*, click **Daily sales**. On the Daily Sales page, click **Discounts or promotion**. The Discounts and promotions screen appears.

Tip: If you configure a Daily Sales button for a specific discount or promotion, click the button to automatically apply the discount or promotion.

2. In the **Discount** field, select the configured discount to apply or whether to enter a promotion code or an adjustable discount.
 - If you select to apply a configured discount, the value of the discount appears at the bottom of the screen. If applicable, select whether to apply the discount to all valid items in the order or to a limited number of items. For a limited discount, enter the number of times to apply the discount.
 - If you select to apply a promotional discount, enter the promotional code for the discount to apply. If applicable, select whether to apply the discount to all valid items in the order or to a limited number of items. For a limited discount, enter the number of times to apply the discount.

Note: If you enter an invalid code or type the code incorrectly, a message appears to inform you that the promotion code cannot be found. If you enter an inactive or expired code, or a code that is not currently valid based on its set criteria, a message appears to inform you that the promotion is not available. To return to the Discounts and promotions screen, click **OK**.

- If you select to apply an adjustable discount, select whether to calculate the discount as an amount or a percentage off the order and enter the value to apply. In the **Reason** field, select why you give the discount, such as for patron dissatisfaction or an event already in progress.
3. Click **Save**. You return to the sales order. In the order summary, the new balance of the order appears.

Note: The discount or promotion appears in the summary only when the order includes an applicable item.

Discounts and Promotions Screen

The table below explains the items on the Discounts and promotions screen. For information about how to access this screen, see [Apply Discounts and Promotions on page 91](#).

Screen Item	Description
Discount	Select the configured discount to apply or whether to enter a promotional code or an adjustable discount.
Promotion code	If you select to enter a promotion code, enter the code for the promotional discount to apply. If you enter an invalid code or type the code incorrectly, the message "Promotion code not found" appears. If you enter an inactive or expired code, or a code that is not currently valid based on availability parameters set for it, the message "Promotion not currently available" appears.
Apply discount	For an applicable configured or promotional discount, select whether to apply the discount to all valid items or to a limited number. For a limited discount, enter the number of times to apply the discount.
Calculation type	If you select to enter an adjustable discount, this field is enabled. Select whether to apply the discount as an amount or a percentage off the purchase.
Value	If you select to enter an adjustable discount, this field is enabled. Enter the value of the discount to apply, such as \$5 or 10%.
Reason	If you select to enter an adjustable discount, this field is enabled. Select a reason as to why you apply the discount.

Manage Order Discounts and Promotions

If you apply multiple discounts and promotions to a sales order, the program evaluates the order and selects the discount, or discounts, that provide the greatest value for the patron. Before you accept a payment for a sales order, you can view all automatic, manual, promotion code discounts, and membership promotions applied to the order, including discounts and promotions that the program selected not to use.

You can remove any discount or promotion applied to an advance sales order as necessary. For example, if you enter the wrong promotion code and apply the incorrect discount, or if you select the AAA manual discount rather than the AARP discount, you can remove the incorrect discount to apply the correct one. After you remove a discount from the order, the program recalculates the price of each item in the order, as well as the price of the entire order. The new price of the order clearly appears in the order summary.

View All Discounts and Promotions Applied to an Advance Sales Order

Before you accept a payment for a sales order, you can view all automatic, manual, promotion code discounts, and membership promotions applied to the order, including discounts and promotions that the program selected not to use. For example, you can view the discounts and promotions to verify they apply correctly to the order.

To view all of the discounts and promotions applied to an advance sales order, on the Create Order tab of the Advance Sales page, click **Discounts and promotions** on the action bar, and select **Manage discounts and promotions**. The Manage discounts and promotions screen appears. In the grid, you can view all discounts and promotions applied, as well as the description of each and the promotion code used, if applicable.

Remove Discounts and Promotions from an Order

Before you accept a payment for a sales order, you can remove any automatic, manual, promotion code discount, or membership promotion applied to the order.

If you apply multiple discounts and promotions to an order, the program evaluates the order and selects the discount, or discounts, that provide the greatest value for the patron. If you remove a discount or promotion that the program selected to use, the program automatically applies the discount or promotion with the next highest value. For example, you enter two promotion code discounts for an order, one with a \$3 value and one with a \$2 value. Since the \$3 value provides the greater value, the program uses that discount. If you then realize you entered the \$3 discount in error and remove it from the order, the program automatically applies the \$2 discount.

➤ Remove discounts from an order

1. On the Advance Sales page, select the Create order tab of the sale in progress and click **Discounts and promotions, Manage discounts and promotions**. The Manage discounts and promotions screen appears.
2. In the grid, select the discount or promotion and click **Remove discount**. The program removes the discount or promotion.
3. Click **Save**. You return to the order page.

After you remove a discount or promotion from the order, the program recalculates the price of each item in the order as necessary, as well as the price of the entire order. In the order summary, the new price of the order appears.

Manage Discounts and Promotions Screen

The table below explains the items on the Manage discounts and promotions screen. For information about how to access this screen, see [Manage Order Discounts and Promotions on page 94](#).

Screen Item **Description**

Name and Description	These columns display the name and description of each discount currently applied.
Code used	This column displays any promotional code entered for a discount.
Apply to	Select whether the discount applies to all items in the sales order or a limited quantity.
Times applied	For a limited discount, this column displays the number of times the discount has been applied. Edit this number as necessary until you reach the discount limit.
Remove discount	To remove a discount or promotion from the order, select in the grid and click this button.

Group Sales

Group Sales Setup	101
Group Sales Setup Checklist	102
Understand Facility Rentals	104
Prepare for Facility Rentals	104
Configure Contract Templates	105
Preconfigured Contract Templates	105
Group Sales Basic Contract	106
Group Sales Contract with Itinerary	108
Group Sales Contract with Itinerary and Resources	110
Facility Contract	112
Edit Preconfigured Templates	114
New Contract Templates	115
Contract Template Data Fields	118
Configure Reservation Defaults	126
Configure Reservation Deposit Defaults	126
Configure Security Deposit Defaults	127
Configure Contract Defaults	129
Configure Final Count Defaults	130
Configure Order Balance Payment Defaults	131
Configure Quick Itinerary Defaults	132
Set Capacity Constraints and Resource Requirements	133
Configure Flat Rate Pricing	135
Change the Default Pricing Structure for Group Sales	136
Add Rate Scales	137
Limit the Programs, Fees, and Resources Included in a Rate Scale	139
Configure Default Flat Rate Applications	141
Edit Rate Scales	143
Delete Rate Scales	143
Configure Facility Prices	143

Build Group Itinerary Tracks	144
Add Group Itinerary Tracks	145
Schedule Group Itinerary Tracks	145
Schedule Daily Admission Programs for a Group Track	146
Schedule Program Events for a Group Track	148
Schedule Custom Items for a Group Track	150
Schedule Group Itinerary Tracks	152
Manage Group Reservations	154
View the Group Reservation Calendar	154
View Completed Group Reservations	155
View Canceled Group Reservations	155
Display In-Progress Group Reservations by Status	155
View Only Past Due Group Reservations	156
Display Capacity Availability	156
View the Group Reservation List	156
Add Group Reservations	157
Add a Contact Relationship	163
Search for Reservations	164
Manage Group Order Contracts	165
Create Contracts	166
View Contracts	167
Edit Contracts	167
Replace Contracts	168
Print Contracts	169
Send Contracts as Email Attachments	169
Mark Contracts as Sent or Not Sent	170
Mark Contracts as Received or Not Received	171
Confirm Final Count for a Group Order	172
Notify Group of Balance Due	173
Edit Group Reservations	175
Edit Reservation Name	175
Edit Group Reservation Times	175
Copy Group Reservations	177
Change Group Visit Dates	180
Manage Flat Rate Pricing	181

Edit Contact Information for Group Reservations	183
View Group Reservation Order History	184
Add Important Notes	185
Delete Group Reservations	185
Cancel Group Reservations	185
Configure Group Itineraries	186
Add Group Itineraries	187
Schedule Group Itineraries	187
Schedule Daily Admission Programs for a Group Itinerary	188
Schedule Program Events for a Group Itinerary	191
Schedule Custom Items for a Group Itinerary	194
Schedule Resources for a Group Itinerary	197
Assign People to Fill Staffing Resource Positions for Itineraries and Itinerary Items	199
Clear a Group Itinerary	202
Copy a Group Itinerary	203
Load a Track for a Group Itinerary	204
Resolve Scheduling Conflicts for a Group Itinerary	205
Save a Group Itinerary as a Track	213
Edit Group Itineraries	214
Delete Group Itineraries	215
Configure Group Arrival Information	215
Manage Group Reservation Documentation	216
Notes	216
Add Notes	216
Add a Note Screen	217
Edit Notes	217
Delete Notes	217
Media Links	218
Add Media Links	218
Add a Media Link Screen	218
Edit Media Links	218
Delete Media Links	219
Attachments	219
Add Attachments	219
Add an Attachment Screen	219

Edit Attachments	220
Delete Attachments	220
Open Attachment Files	220
Notifications	220
Add Notifications to Specific Records	221
Edit Notifications for Specific Records	223
Delete Notifications from Specific Records	223
Manage Group Sales Discounts and Promotions	223
Apply Group Sales Discounts and Promotions	224
View All Discounts and Promotions Applied to a Reservation	225
Remove Discounts and Promotions from a Reservation	225
Process Group Payments	226
Print or Reprint Group Reservation Sales Documents	228
Refunds for Group Sales Reservations	229
Process Group Check In	230
View the Groups Scheduled to Check In	231
View and Print Group Itinerary Reports	231
Check In Groups	231
Process Group Check Out	234
View the Groups Scheduled to Check Out	234
Refund Security Deposits	235
Keep Overage for Group Reservations	237

During the group sales process, a patron contacts your organization and inquires about a group visit or facility rental. The group sales coordinator who fields the inquiry begins the group sales process by requesting the date and time of the visit. They review the upcoming availability to determine what is available during the specified date and time. Next, the patron confirms the date and time they want to attend and the group sales coordinator adds a reservation.

When the reservation is added, an existing patron record is selected or a new record is added. This patron is linked to the reservation. The group sales coordinator also enters a name for the reservation, selects an existing contact or adds a new contact, and enters any notes regarding the booking. Once the reservation is saved, the reservation record is displayed. From the reservation record, the group sales coordinator can further define the group visit or facility rental by configuring arrival information, adding and scheduling the group itinerary, and preparing contracts, and processing payments.

Group Sales Setup

To help you configure the system for group sales, we provide the Group Sales Setup page to guide you through the necessary steps. This page provides an interactive list of the tasks you need to complete before you can process group sales. To access the Group Sales Setup page, from *Tickets*, click **Group sales setup**.

Group Sales Setup

To help you configure the system for group sales, we provide the following interactive checklist. Tasks are listed in the recommended order of completion and are links you can click. A red "X" appears next to tasks that are not yet complete. After a task is complete, a green checkmark appears.

Note: Some tasks will already have a green checkmark due to default data provided with the system. You should review all default data and verify that it meets the needs of your organization.

- [Price types](#)

Price types are the different kind of rates that apply to patrons when they purchase tickets, such as Adult and Child. Price types make up price lists, and there may be different price types available for each program and sales method.

8 price types available
- [Group sales sales method](#)

The group sales sales method controls which fees, payment types, and price types are used in group sales.

No required information missing
- [Price lists](#)

Price lists provide a starting point for configuring ticket prices on programs and program events. When you add a price list you select price types to include in the list, such as Adult and Child.

3 price lists available for group sales
- [Locations](#)

Locations are where scheduled events for programs are held. Each location has address information, contact information, and location capacity.

18 locations available
- [Resources](#)

Resources are people or items that may be required for a program event or group order, such as tour guides, chairs, projectors, or other electronic equipment.

4 supply/equipment resources available
15 staff resources available
- [Group types](#)

Group types are categories of groups that might come for group visits. Once you set up group types, you can assign them to your reservation itineraries and report on them.

The tasks on the Group Sales Setup page are presented in a specific order because some build on others. Each task is linked to the corresponding area of the program where you complete the selected task. For example, when you select **Resources** from the Group Sales Setup page, you are sent to the Resources page so you can add and manage the resources your organization will use for group reservations.

Next to each task on the Group Sales Setup page a red "X" appears to indicate that configuration is incomplete. After each task is complete, a green checkmark appears. When you first access the Group Sales Setup page, some tasks will already have a green checkmark due to default data provided with the system. You should review all default data and verify that it meets the needs of your organization.

If a task has a dependency upon the completion of another task, it will be inactive until all other tasks on which it depends are complete. For example, **Group type resource requirements** will be inactive until you have configured at least one group type. Provided under each task is a brief description, as well as a count of how many active individual records have been configured in each feature area. For example, if you have configured five price types, "5 price types available" appears under **Price types** on the Ticket Sales Setup page.

Note: While some tasks, like add locations and configure prices, must be configured by all organizations, a number of configuration tasks are optional. For example, not all organizations will need to configure resources for groups or set up flat rate pricing. The tasks your organization needs to complete is directly related to your business processes.

After you complete a task, you can navigate back to the Group Sales Setup page by clicking the direct link provided in each feature area. This allows you to easily continue to the next task. To return to Group Sales Setup from a feature area, under **Setup** on the explorer bar, click **Group sales setup**.

For more information about each item on the Group Sales Setup page, see [Group Sales Setup Checklist on page 102](#).

Group Sales Setup Checklist

The following checklist is a suggested workflow for initial configuration. The tasks are presented in a specific order because some tasks build on others. While some tasks, like add locations and configure prices, must be configured by all organizations, a number of configuration tasks are optional. The tasks your organization needs to complete is directly related to your business processes.

- Add price types. Price types are the different rates that apply to patrons when they purchase tickets, such as Adult and Child. For group sales, you may want to add specific price types. For example, "Group student" and "Group chaperone." From *Administration*, you add price types your organization uses so they may be easily selected for use when you create price lists. For more information, see the *Tickets Guide*.
- Configure the 'group sales' sales method. The way a customer purchases a ticket is called a sales method. By default, the system includes every sales method your organization needs. During initial setup and as needed, you configure the sales methods to meet the specific needs of your organization. The 'group sales' sales method controls which fees, payment types, and price types are used in group sales. For more information, see the *Tickets Guide*.
- Configure price lists. To make the process of assigning prices more efficient, we recommend that you configure price lists. Price lists are intended to provide a starting point for when you configure ticket prices on programs and program events. When you add a price list you select price types to include in the list. If a price type you need does not exist, you can add one. For more information, see the *Tickets Guide*.
- Add locations. Each location you add has address information, contact information, and location capacity. After a location is added it is available for all event types. For more information, see the *Tickets Guide*.
- Add resources. Resources are items that may be required for a program event or group order. For example, you may offer a program that requires electronic equipment, chairs, or information packets. Before you can assign the required resources to an event, they must be added to the

system. You can assign resources to group orders for a specified interval of time or for the duration of an event. For more information, see the *Tickets Guide*.

- Add group types. Group types are categories of groups that might come for group visits. Once you set up group types, you can assign them to your reservation itineraries and report on them. You can also associate specific resources with group types which can streamline assigning resources for a reservation when a group type is selected. You add group types in *Administration*.
- Configure group type resource requirements. Group types can have resource requirements attached to them, which will automatically add the resources you select to any itinerary using a certain group type. For more information, see [Set Capacity Constraints and Resource Requirements on page 133](#).
- Add daily admission programs. Daily admission programs are untimed and designed for all day, general admission to your organization's facility. You can set prices, fees and taxes, and discounts for each daily admission program you schedule. For more information, see the *Tickets Guide*.
- Add scheduled programs. You configure scheduled programs to sell tickets for timed events. For example, if your organization has a "Sea Turtles" exhibit that occurs three times a day on Mondays and Wednesdays, you would set up a "Sea Turtles" scheduled program and schedule events according to the days and times of each occurrence. For more information, see the *Tickets Guide*.
- Schedule program events. After you add a scheduled program, you schedule program events. Program events are the specific occurrences of programs, such as the 7:30 p.m. showing of an IMAX movie your organization sells. Each event you schedule determines when and where each separate occurrence of a program takes place. For more information, see the *Tickets Guide*.
- Configure discounts for group sales. Discounts are price reductions applied to tickets or items purchased. You can configure standard discounts or discounts that require the purchase of another item, and determine if they should be applied automatically, manually, or with the entry of a promotion code. For a discount to be available for group sales purchases, the discount availability settings must include the "Group sales" sales method. For more information, see the *Tickets Guide*.
- Build group itinerary tracks. Before you begin processing group sales, you may also want to configure group itinerary tracks. Although not required, you can build group itinerary tracks to help you efficiently schedule itineraries for group visits. Tracks are especially helpful if your organization gets a large number of groups requesting the same type of group visit. For more information, see [Build Group Itinerary Tracks on page 144](#).
- Configure reservation defaults. Reservation defaults can help your organization maintain a consistent policy for collecting group reservation deposits, sending out contracts, recording a group's final count, and setting a due date for the order balance. For more information, see [Configure Reservation Defaults on page 126](#).
- Configure flat rate pricing. Flat rate pricing is an alternative to per ticket pricing. It allows you to charge a flat amount for a group visit instead of calculating the cost per ticket using the price lists assigned to each program in the group's itinerary. For more information, see [Configure Flat Rate Pricing on page 135](#).
- Set capacity constraints. With capacity constraints, you set the maximum number of people per day for all group sales. Capacity constraints only limit the number of attendees for all groups who have reservations for a day. They do not limit the number of advance or walk-up sales. For more information, see [Set Capacity Constraints and Resource Requirements on page 133](#).

- Configure contract templates. If your organization uses contracts as part of your group sales process, you must complete a number of configuration tasks before you can create personalized contracts for group reservations. For more information, see [Configure Contract Templates on page 105](#).
- Configure the order balance email template. You can notify a group of the balance due by sending a copy of the group sales order balance notification. To email the notification, you must first configure the email template. The template includes a customizable introduction and closing, and details about the order such as the number of visitors, visit date, order balance, and number of days past due (if applicable). You must enter a Subject, From address, and From name for the email.
- If your organization plans to offer facility rentals, you should complete several tasks. These tasks include configuring a facility rental contract and defining facility prices. For more information, see the next section.

Understand Facility Rentals

To generate an additional source of revenue, many organizations rent out space within their facilities for various events like weddings or corporate meetings. Facility rentals are handled within group sales and use the same mechanisms that are used to book and process group visits.

A facility rental starts as a standard group reservation. The due date requirements you configure for traditional reservations can also apply to a facility rental. You can require a reservation deposit, security deposit, and contract and set due dates for each. You can also require the final count and order balance to be received by a specific date. For more information, see [Add Group Reservations on page 157](#).

Once a reservation is added, you then customize the group itinerary by adding a custom item for the specific rental period. On the custom item, you select the location being rented. If you previously configured a default facility price for the selected location, the price automatically appears. If not, you can enter the correct price as needed. For more information, see [Schedule Custom Items for a Group Itinerary on page 194](#).

Typically, reservations for facility rentals include only a single itinerary with a custom item used to book a location within your facility for a specific period of time. Although this is the most common situation, a reservation for a facility rental can also include scheduled event tickets or admissions, resources, and other custom items. If there are no tickets included in the reservation, the pricing structure selected on the reservation does not apply. Instead, pricing is charged according to the amount associated with the location booked.

Note: Before you begin processing facility rentals, there are several tasks you should complete. These tasks include configuring a facility rental contract and defining facility prices. For more information, see the next section.

Prepare for Facility Rentals

If your organization plans to offer facility rentals, you should complete the following preparation tasks before you get started.

- If your organization plans to use contracts as part of your facility rental process, you must complete a number of configuration tasks before you can create personalized contracts for facility reservations. For more information about contract templates, see [Configure Contract Templates on page 105](#).
- To help standardize the amounts charged for rentals and save data entry time when booking the facility rental, we recommend that you configure default prices for the locations you commonly rent. For more information about default facility prices, see [Configure Facility Prices on page 143](#).
- Add a specific “Facility rental attendee” price type allowed only for the “Group Sales” sales method and do not associate it with any price lists. The cost of a facility rental is determined by the price of the location being rented not a price list. A price type specific to facility rentals will be required when you add an itinerary to the reservation. During this process, you must select a price type and then enter the number of expected attendees. For more information, see the *Tickets Guide*.
- If your organization uses group types, you can add a “Facility rental” group type. Group types are categories used on reservations. Once you set up group types, you can assign them to your reservation itineraries and report on them. You can also associate specific resources with group types which can streamline assigning resources for a reservation when a group type is selected. You add group types in *Administration*. This is an optional step.

Configure Contract Templates

Some organizations send contracts out to formalize and confirm group orders and facility rentals. If your organization uses contracts as part of your group sales process, you must complete a number of configuration tasks before you can create personalized contracts for group reservations.

First, you must edit the preconfigured contract templates included in the system to meet the needs of your organization or create new contract templates. Each template is a mail merge document created in Microsoft *Word*. The templates use data fields that are included in the body of the contract letter to pull specific order data from your database and display it in the contract. For more information about the fields that can be added to a template, see [Contract Template Data Fields on page 118](#).

After you configure or add templates to use for your contracts, you set contract defaults. With the default settings you can require a contract for all group orders and set defaults that determine when a signed contract is due. Additionally, you can select a default contract template to use. For more information, see [Configure Contract Defaults on page 129](#).

Preconfigured Contract Templates

By default, the system includes a selection of preconfigured templates you can use when creating contracts for group reservations or facility rentals. The preconfigured templates include a basic group sales contract, a group sales contract with itinerary information, and a group sales contract with both itinerary information and resources. We also include a basic facility contract that your organization can use if you rent out space within your facility for various events like weddings or corporate meetings.

These templates are already configured with the necessary data fields used to pull specific group order data into each contract. You just need to review the templates, decide which your organization will use, and update the text and content of each letter to meet the needs of your organization. For

more information about editing the preconfigured templates to meet your needs, see [Edit Preconfigured Templates on page 114](#).

It is important to note that security deposit fields are not included in the default contract templates. If your organization uses security deposits and you want to include the amount required, due date, and balance in your contracts, you will need to manually add those fields to your contract templates. For a list of available fields, see [Contract Template Data Fields on page 118](#).

If a template includes information or data fields that your organization does not track as part of your group sales process, you can remove those items from the contract template. For example, if your organization does not require a deposit or final count, you can remove those items from the template. However, if you require a deposit or final count in some cases, you should leave those items in the template and edit the individual contract at the time it is created to remove data fields that do not apply.

Each default contract template included with the system is described in detail below. A sample view of each template is provided along with a contract created using each template.

Group Sales Basic Contract

The “Group sales basic contract” is a standard contract template that includes your organization name and contact information, the patron’s name and address, as well as the group contact’s name, address, and phone. The template also includes the group reservation date, planned arrival time, and the number of buses that are expected. Additionally, this template includes the deposit amount and deposit due date, final count due date, order total, and order balance due date.

Template view:

Group Visit Agreement

«ORGANIZATION_NAME»

«ORGANIZATION_ADDRESS»

«ORGANIZATION_CITY», «ORGANIZATION_STATE» «ORGANIZATION_ZIP»

Customer:

«PATRON_NAME»

«PATRON_ADDRESS»

«PATRON_CITY»,

«PATRON_STATE» «PATRON_ZIP»

Order contact:

«CONTACT_NAME»

«CONTACT_ADDRESS»

«CONTACT_CITY»,

«CONTACT_STATE»

«CONTACT_ZIP»

«CONTACT_PHONE»

We look forward to your visit on «RESERVATION_DATE».

Your current reservation is for «NUMBER_OF_VISITORS» total visitors.

We're expecting «NUMBER_OF_BUSES» buses at «ARRIVAL_TIME».

Please submit the deposit amount of «DEPOSIT_AMOUNT» no later than «DEPOSIT_DUE_DATE».

We will need the final visitor count no later than «FINAL_COUNT_DUE_DATE».

The order balance of «ORDER_TOTAL» is due on «ORDER_BALANCE_DUE_DATE».

Contract view:

Group Visit Agreement

Blackbaud Museum

2000 Daniel Island Drive
Charleston, SC 29466

Customer:
ABC Learning Center
29 Hitch Avenue
Morgan, UT 84050

Order contact:
Beverly Sprague
801-557-2819

We look forward to your visit on 12/18/2009.

Your current reservation is for **24** total visitors.

We're expecting **2** buses at **8:30 AM**.

Please submit the deposit amount of **\$50.00** no later than 12/11/2009.

We will need the final visitor count no later than 12/11/2009.

The order balance of **\$192.00** is due on 12/18/2009.

Group Sales Contract with Itinerary

The "Group sales contract with itinerary" template includes the itinerary details for a group visit, your organization name and contact information, the patron's name and address, as well as the group contact's name, address, and phone. The template also includes the group reservation date, planned arrival time, and the number of buses that are expected. Additionally, this template includes the deposit amount and deposit due date, final count due date, order total, and order balance due date.

In addition to the standard group sales contract information outlined above, this template includes the itinerary details for a group visit.

Template view:

Group Visit Agreement

«ORGANIZATION_NAME»

«ORGANIZATION_ADDRESS»

«ORGANIZATION_CITY», «ORGANIZATION_STATE» «ORGANIZATION_ZIP»

«ORGANIZATION_PHONE»

«ORGANIZATION_WEB»

Customer:

«PATRON_NAME»

«PATRON_ADDRESS»

«PATRON_CITY»,

«PATRON_STATE» «PATRON_ZIP»

Order contact:

«CONTACT_NAME»

«CONTACT_ADDRESS»

«CONTACT_CITY»,

«CONTACT_STATE»

«CONTACT_ZIP»

«CONTACT_PHONE»

We look forward to your visit on «RESERVATION_DATE».

Your current reservation is for «NUMBER_OF_VISITORS» total visitors.

We're expecting «NUMBER_OF_BUSES» buses at «ARRIVAL_TIME».

Itinerary for your visit:

«ITINERARY_BLOCK»

Please submit the deposit amount of «DEPOSIT_AMOUNT» no later than

«DEPOSIT_DUE_DATE».

We will need the final visitor count no later than «FINAL_COUNT_DUE_DATE».

The order balance of «ORDER_TOTAL» is due on «ORDER_BALANCE_DUE_DATE».

Contract view:

Group Visit Agreement

Blackbaud Museum

2000 Daniel Island Drive
Charleston, SC 29466
843-216-6200
<http://www.blackbaud.com>

Customer:
ABC Learning Center
29 Hitch Avenue
Morgan, UT 84050

Order contact:
Beverly Sprague
801-557-2819

We look forward to your visit on 12/18/2009.

Your current reservation is for **24** total visitors.

We're expecting **2** buses at **8:30 AM**.

Itinerary for your visit:

Beverly Sprague

9:00 AM	Admission
12:00 PM	Lunch
2:00 PM	Sea Turtles Tank Tour

Please submit the deposit amount of **\$50.00** no later than 12/11/2009.

We will need the final visitor count no later than 12/11/2009.

The order balance of **\$192.00** is due on 12/18/2009.

Group Sales Contract with Itinerary and Resources

The "Group sales contract with itinerary and resources" template includes the itinerary details for the group visit, any resources required by the group, your organization name and contact information, the patron's name and address, and the group contact's name, address, and phone. The template also includes the group reservation date, planned arrival time, and the number of buses that are expected. Additionally, this template includes the deposit amount and deposit due date, final count due date, order total, and order balance due date.

Template view:

Group Visit Agreement

«ORGANIZATION_NAME»

«ORGANIZATION_ADDRESS»

«ORGANIZATION_CITY», «ORGANIZATION_STATE» «ORGANIZATION_ZIP»

«ORGANIZATION_PHONE»

«ORGANIZATION_WEB»

Customer:

«PATRON_NAME»

«PATRON_ADDRESS»

«PATRON_CITY»,

«PATRON_STATE» «PATRON_ZIP»

Order contact:

«CONTACT_NAME»

«CONTACT_ADDRESS»

«CONTACT_CITY»,

«CONTACT_STATE»

«CONTACT_ZIP»

«CONTACT_PHONE»

We look forward to your visit on «RESERVATION_DATE».

Your current reservation is for «NUMBER_OF_VISITORS» total visitors.

We're expecting «NUMBER_OF_BUSES» buses at «ARRIVAL_TIME».

Itinerary for your visit:

«ITINERARY_BLOCK»

Resources scheduled for your visit:

«RESOURCE_BLOCK»

Please submit the deposit amount of «DEPOSIT_AMOUNT» no later than

«DEPOSIT_DUE_DATE».

We will need the final visitor count no later than «FINAL_COUNT_DUE_DATE».

The order balance of «ORDER_TOTAL» is due on «ORDER_BALANCE_DUE_DATE».

Contract view:

Group Visit Agreement

Blackbaud Museum

2000 Daniel Island Drive
Charleston, SC 29466
843-216-6200
<http://www.blackbaud.com>

Customer:
ABC Learning Center
29 Hitch Avenue
Morgan, UT 84050

Order contact:
Beverly Sprague
801-557-2819

We look forward to your visit on 12/18/2009.

Your current reservation is for **24** total visitors.

We're expecting **2** buses at **8:30 AM**.

Itinerary for your visit:

Beverly Sprague

9:00 AM	Admission
12:00 PM	Lunch
2:00 PM	Sea Turtles Tank Tour

Resources scheduled for your visit:

WORKBOOK – 24 @ 0.50: 12.00

Please submit the deposit amount of **\$50.00** no later than 12/11/2009.

We will need the final visitor count no later than 12/11/2009.

The order balance of **\$192.00** is due on 12/18/2009.

Facility Contract

The "Facility contract" is a standard contract template that you can use if your organization engages in facility rentals. It includes your organization name and contact information, the patron's name and address, as well as the group contact's name, address, and phone. The template also includes the reservation date, the specific facilities booked, and any resources required. Additionally, this template includes the deposit amount and deposit due date, order total, and order balance due date.

Template view:

Facility Rental Agreement

«ORGANIZATION_NAME»

«ORGANIZATION_ADDRESS»

«ORGANIZATION_CITY», «ORGANIZATION_STATE» «ORGANIZATION_ZIP»

«ORGANIZATION_PHONE»

«ORGANIZATION_WEB»

Customer:

«PATRON_NAME»

«PATRON_ADDRESS»

«PATRON_CITY»,

«PATRON_STATE» «PATRON_ZIP»

Order contact:

«CONTACT_NAME»

«CONTACT_ADDRESS»

«CONTACT_CITY»,

«CONTACT_STATE»

«CONTACT_ZIP»

«CONTACT_PHONE»

We look forward to your visit on «RESERVATION_DATE».

Facilities to be used during your visit:

«FACILITY_BLOCK»

Resources scheduled for your visit:

«RESOURCE_BLOCK»

Please submit the deposit amount of «DEPOSIT_AMOUNT» no later than

«DEPOSIT_DUE_DATE».

The order balance of «ORDER_TOTAL» is due on «ORDER_BALANCE_DUE_DATE».

Contract view:

Facility Rental Agreement

Organization name

Customer:
Robert C. Hernandez
410 17th St
Denver, CO 80202-4402

Order contact:
Robert C. Hernandez
410 17th St
Denver, CO 80202-4402
303-997-3301

We look forward to your visit on 6/25/2010.

Facilities to be used during your visit:

Central Gardens 9:00 AM - 2:00 PM @ 500.00

Resources scheduled for your visit:

Please submit the deposit amount of **\$50.00** no later than 6/16/2010.

The order balance of **\$500.00** is due on 6/25/2010.

Edit Preconfigured Templates

If your organization plans to use the preconfigured contract templates for group sales and facility rentals, you should review each and edit them as needed to meet the needs of your organization. For example, you can edit the language used in the body of the contract letter and add an organization logo or other images to the templates. Common edits include adding different opening and closing salutations, including a mission statement or other organization-specific information, and a signature line with legal text to make the document a binding contact.

You can also add or remove data fields to control the order information pulled from your database and placed in each contract created using the templates. For a listing of the data fields that can be used in contacts, see [Contract Template Data Fields on page 118](#).

Note: In order to edit the preconfigured templates, you must have Microsoft *Word* installed.

➤ Edit a preconfigured contract template

1. From the Group Sales page, under **Configuration**, click **Letter template library**. The Letter Template Library page appears.
2. In the grid, under **Group sales contract**, select the preconfigured template to edit. For more information about each template, see [Preconfigured Contract Templates on page 105](#).
3. Click **Edit**. The Edit letter template screen appears.
4. Next to **Letter**, click the document link. If you have *Word* installed, the contract template opens and you can edit it as needed.
5. After you make the necessary changes, save and close the document. You return to the Edit letter template screen appears.
6. Click **Save**. The updated contract is saved and stored in your database.

New Contract Templates

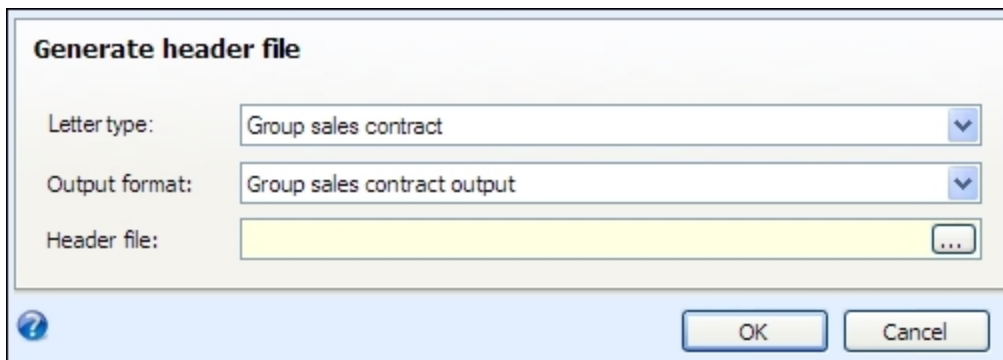
By default, the system includes a selection of preconfigured templates you can use when creating contracts for group reservations and facility rentals. We recommend you use the pre-configured contacts as a starting point. For more information, see [Preconfigured Contract Templates on page 105](#). If needed, you can create your own contract templates instead of using the preconfigured templates.

The overall process of creating new contract templates involves three main tasks: generate a group sales contract header file, create a group sales contract document in *Word*, and add the contract template to the Letter Template Library.

Note: You must have Microsoft *Word* installed to create your own contract templates. Previous experience creating mail merge documents in Word will be helpful when creating new contract templates.

➤ Generate a group sales contract header file

1. From the Group Sales page, under **Configuration**, click **Letter template library**. The Letter Template Library page appears.
2. Under **Tasks**, click **Generate header file**. The Generate header file screen appears.



The screenshot shows a dialog box titled "Generate header file". It contains three fields:

- Letter type:** A dropdown menu with "Group sales contract" selected.
- Output format:** A dropdown menu with "Group sales contract output" selected.
- Header file:** A text input field with a browse button (three dots) to the right.

At the bottom of the dialog, there are "OK" and "Cancel" buttons.

3. In the **Letter type** field, select "Group sales contract."
4. In the **Output format** field, select "Group sales contract output."
5. In the **Header file** field, click the ellipsis. The Save As screen appears. Browse to the location to save the new *.csv header file and name the file.

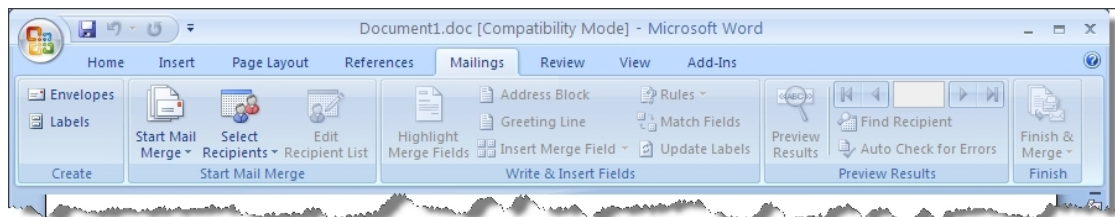
Note: Make sure you save this file in an accessible location. It will be used as the data source when you create the contract document in *Word*.

6. Click **Save**. A message appears to determine if you want to open the *.csv file. Now that you have a group sales contract header file to use as your data source, you are ready to create a group sales contract document.

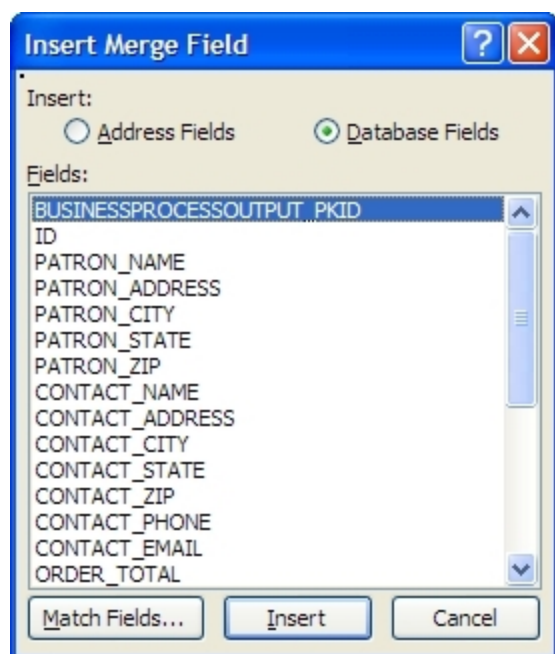
➤ Create a group sales contract document

You must have Microsoft *Word* installed to create your own contract templates. This procedure guides you through the steps required to create a contact document using *Word 2007*.

1. From *Word*, create a new blank document and write the body of the contract letter. The body of the letter should provide context for the data fields you will add to the letter during this process. For examples of how to format the letter, you can review the preconfigured templates included in the system. For more information see, [Preconfigured Contract Templates on page 105](#).
2. On the ribbon, select the Mailings tab.



3. In the **Start Mail Merge** group, click **Select Recipients, Use Existing List**. The Select Data Source screen appears.
4. Browse to contract header file (*.csv) you previously created, select it and click **Open**. The Header Record Delimiters screen appears. For information about how to generate a header file, see [Generate a group sales contract header file on page 115](#).
5. Leave the default settings as they appear on the Header Record Delimiters screen and click **OK**. You return to the *Word* document.
6. In the **Write & Insert Fields** group, click **Insert Merge Field**. The Insert Merge Field screen appears and displays the group order data fields you can add to the contact template.



Note: Prior to inserting a field, you can place your cursor in the document in the location where the field should go within the body of the contract letter. You can also move the fields around as needed within the document once they are inserted.

7. Make sure **Database Fields** is selected. In the list, select a data field to add to the contract letter and click **Insert**. The field is added to the *Word* document. Repeat this step for each field you want to include in the contract template.

Note: The data fields you place in the contract letter template will be used to pull specific data from your database when a contract is created for a group order. For a list of the fields you can insert and their definitions, see [Contract Template Data Fields on page 118](#).

8. To return to the document, click **Close**. When you are done inserting data fields and writing the body of the contract letter template, save and close the document. Now that you have created the contract template, you are ready to add it to the Letter Template Library. To access the Letter Template Library, from *Group Sales*, under **Configuration**, click **Letter template library**.

Note: Make sure you save the document in a format that is compatible with the version of *Word* installed on each workstation. For maximum compatibility, we recommend you save each template as a "Word 97-2003 Document (*.doc)" file. Also make sure you save the file in an accessible location.

➤ Add the contract document to the Letter Template Library

1. From the Group Sales page, under **Configuration**, click **Letter template library**. The Letter Template Library page appears.
2. Click **Add**. The Add letter template screen appears.

3. Enter a name and description for the contract template.
4. In the **Letter type** field, select "Group sales contract."
5. In the **Output format** field, select "Group sales contract output."
6. Next to **Letter**, click **Choose file**. The Open screen appears. Browse to the contract template you previously created, select the file, and click **Open**. You return to the Add letter template screen and a link to the document is displayed.

Note: To view and edit the document, click document link. If you have a compatible version of Microsoft Word installed, the contract template opens and you can view and edit it as needed.

7. Click **Save**. You return to the Letter Template Library page and the document is listed in the **Group sales contract** section. The contract template is now saved in your database and can be selected when creating personalized contracts for group orders or facility rentals depending on the contract. For information about setting this as the default contract template, see [Configure Contract Defaults on page 129](#). For information about creating contacts using this template, see [Manage Group Order Contracts on page 165](#).

Contract Template Data Fields

When you specify data fields in a contract template, you can include information like the patron name and address, contact name and address, reservation date, and group itinerary. You can also include transaction information and due dates for the deposit, security deposit, contract, and order balance.

The following table includes a list of the data fields you can include in your contract templates. For examples that illustrate of how these fields are typically used in a contract, see [Preconfigured Contract Templates on page 105](#).

Note: You use the ORGANIZATION fields listed in the table to pull your organization's name, address, phone number, and website address into the contract.

Field name	Description
BUSINESSPROCESSOUTPUT...PKID	This field is related to a system business process and should not be added to the contract template.
ID	This field is the systemID for the reservation and should not be added to a contract template.
PATRON_NAME	Patron name
PATRON_ADDRESS	Patron address
PATRON_CITY	Patron city
PATRON_STATE	Patron state
PATRON_ZIP	Patron ZIP
CONTACT_NAME	Contact name
CONTACT_ADDRESS	Contact address
CONTACT_CITY	Contact city
CONTACT_STATE	Contact state
CONTACT_ZIP	Contact ZIP
CONTACT_PHONE	Contact phone
CONTACT_EMAIL	Contact email
ORGANIZATION_NAME	Name of the organization creating the contract
ORGANIZATION_ADDRESS	Organization address
ORGANIZATION_CITY	Organization city
ORGANIZATION_STATE	Organization state
ORGANIZATION_ZIP	Organization ZIP
ORGANIZATION_PHONE	Organization phone
ORGANIZATION_WEB	Organization website address
ORDER_TOTAL	Order total
ORDER_BALANCE	Amount due when the contract is created
BALANCE_AFTER_DEPOSIT	Remaining balance after deposit (Order total – deposit)
DEPOSIT_AMOUNT	Deposit amount

Field name	Description
DEPOSIT_DUE_DATE	Deposit due date
FINAL_COUNT_DUE_DATE	Final count due date
ORDER_BALANCE_DUE_DATE	Order balance due date
SECURITY_DEPOSIT_AMOUNT	Security deposit amount
SECURITY_DEPOSIT_DUE_DATE	Security deposit due date
SECURITY_DEPOSIT_BALANCE	Security deposit balance
RESERVATION_DATE	Reservation date
ARRIVAL_TIME	Arrival time
NUMBER_OF_BUSES	Number of buses
ARRIVAL_AREA	Arrival area
NUMBER_OF_VISITORS	Total number of visitors
FACILITY_BLOCK	<p>This is a list of the facilities booked by the group, formatted as follows:</p> <p>Location name - start and end time @ cost</p> <p>If applicable, repeat for each group on the reservation, with a line break between groups.</p>

Field name	Description
ITINERARY_BLOCK	<p>This is a list of all the items in the group's itinerary, formatted as follows:</p> <p>Group name<line break> Item start time - Item name<line break> <repeat for each itinerary item></p> <p>Repeat for each group on the reservation, with a line break between groups.</p>
RESOURCES_BLOCK	<p>This is a list of all the resources attached to the reservation, formatted as follows:</p> <p>Resource name - Quantity @ unit cost: total cost<line break></p> <p>Repeat for each group on the reservation, with a line break between groups.</p>
TKTDESC1	Description #1
TKTSTARTDT1	Start date #1
TKTSTARTTM1	Start time #1
TKTQTY1	Quantity #1
TKTPRICE1	Price #1
TKTDSC1	Discount #3
TKTFEE1	Fee #3
TKTTOTAL1	Total #3
TKTDESC2	Description #2
TKTSTARTDT2	Start date #2
TKTSTARTTM2	Start time #2
TKTQTY2	Quantity #2
TKTPRICE2	Price #2
TKTDSC2	Discount #2

Field name	Description
TKTFEE2	Fee #2
TKTTOTAL2	Total #2
TKTDESC3	Description #3
TKTSTARTDT3	Start date #3
TKTSTARTTM3	Start time #3
TKTQTY3	Quantity #3
TKTPRICE3	Price #3
TKTDSC3	Discount #3
TKTFEE3	Fee #3
TKTTOTAL3	Total #3
TKTDESC4	Description #4
TKTSTARTDT4	Start date #4
TKTSTARTTM4	Start time #4
TKTQTY4	Quantity #4
TKTPRICE4	Price #4
TKTDSC4	Discount #4
TKTFEE4	Fee #4
TKTTOTAL4	Total #4
Fields below are displayed if more than 4 price types are associated with this reservation	
TKTDESCREST	Field displays as "Other tickets" when additional price types are present
TKTQTYREST	Sum total of number of tickets for these additional price types
TKTPRICEREST	Sum total of ticket prices for these additional price types
TKTDSCREST	Sum total of ticket discounts for these additional price types
TKTFEEREST	Sum total of ticket fees for these additional price types
TKTTOTALREST	Sum total of tickets sold for these additional price types
RSCDESC1	Name of the resource

Field name	Description
RSCSTDT1	Start Date of itinerary-program that is associated with resource
RSCENDDT1	End Date of itinerary-program that is associated with resource
RSCQTY1	Quantity of resource associated with the itinerary
RSCPRICE1	Price of resource associated with the itinerary
R SCTOTAL1	Total price of the resources associated with the itinerary
Values for resource #2, #3 and #4 as per #1 details above	
RSCDESC2	Name #2
RSCSTDT2	Start Date #2
RSCENDDT2	End Date #2
RSCQTY2	Resource Quantity #2
RSCPRICE2	Resource Price #2
R SCTOTAL2	Resource Total #2
RSCDESC3	Name #3
RSCSTDT3	Start Date #3
RSCENDDT3	End Date #3
RSCQTY3	Resource Quantity #3
RSCPRICE3	Resource Price #3
R SCTOTAL3	Resource Total #
RSCDESC4	Name #4
RSCSTDT4	Start Date #4
RSCENDDT4	End Date #4
RSCQTY4	Resource Quantity #4
RSCPRICE4	Resource Price #4
R SCTOTAL4	Resource Total #4
Fields below are displayed if more than 4 resources are connected to the reservation	
RSCDESCREST	Field displays as "Other resources" when reservation has more than 4 resources
R SCTOTALREST	Total amount based on resources over the 4 count
STFTYPE1	Staffing Resource Name #1

Field name	Description
STFNAME1	Person assigned to this staffing resource #1
STFST1	Starting Time for this staffing resource #1
STFET1	Ending time for this staffing resource #1
STFIN1	Itinerary Name for this resource #1
STFII1	Itinerary Item for this resource #1
STFOPEN1	Number of available resources left to assign for this staffing resource
STFPRICE1	Price for this staffing resource #1
Values for staffing resource #2, #3 and #4 as per #1 details above	
STFTYPE2	Staffing Resource Name #2
STFNAME2	Person assigned to this staffing resource #2
STFST2	Starting Time for this staffing resource #2
STFET2	Ending time for this staffing resource #2
STFIN2	Itinerary Name for this resource #2
STFII2	Itinerary Item for this resource #2
STFOPEN2	Number of available resources left to assign for this staffing resource
STFPRICE2	Price for this staffing resource #2
STFTYPE3	Staffing Resource Name #3
STFNAME3	Person assigned to this staffing resource #3
STFST3	Starting Time for this staffing resource #3
STFET3	Ending time for this staffing resource #3
STFIN3	Itinerary Name for this resource #3
STFII3	Itinerary Item for this resource #3
STFOPEN3	Number of available resources left to assign for this staffing resource
STFPRICE3	Price for this staffing resource #3
STFTYPE4	Staffing Resource Name #4
STFNAME4	Person assigned to this staffing resource #4
STFST4	Starting Time for this staffing resource #4
STFET4	Ending time for this staffing resource #4

Field name	Description
STFIN4	Itinerary Name for this resource #4
STFII4	Itinerary Item for this resource #4
STFOPEN4	Number of available resources left to assign for this staffing resource
STFPRICE4	Price for this staffing resource #4
STFTYPEREST	Field displays as "More staff resources..." when reservation has more than 4 staff resources.
ITINNAME1	Name of itinerary #1
ITINLDR1	Name of the contact for itinerary #1
ITINGT1	Group type for itinerary #1
ITINST1	Start time of the itinerary #1
ITINET1	End time of the itinerary #1
Values for itineraries #2, #3 and #4 as per #1 details above	
ITINNAME2	Name of itinerary #2
ITINLDR2	Name of the contact for itinerary #2
ITINGT2	Group type for itinerary #2
ITINST2	Start time of the itinerary #2
ITINET2	End time of the itinerary #2
ITINNAME3	Name of itinerary #3
ITINLDR3	Name of the contact for itinerary #3
ITINGT3	Group type for itinerary #3
ITINST3	Start time of the itinerary #3
ITINET3	End time of the itinerary #3
ITINNAME4	Name of itinerary #4
ITINLDR4	Name of the contact for itinerary #4
ITINGT4	Group type for itinerary #4
ITINST4	Start time of the itinerary #4
ITINET4	End time of the itinerary #4
ITINNAMEREST	Field displays as "Other Itineraries" when reservation has more than 4 itineraries
RESERVATIONNAME	Name of the reservation

Field name	Description
ORDERID	Sales Order ID #
CONTRACTCREATEDDATE	Date contract was created
IMPORTANTNOTES	Important Notes Field

Configure Reservation Defaults

Reservation defaults can help your organization maintain a consistent policy for collecting group reservation deposits, sending out contracts, recording a group's final count, and setting a due date for the order balance. You can also define default arrival and departure dates used when creating a quick itinerary for a reservation. The defaults you configure can be changed during the group sales process.

Configure Reservation Deposit Defaults

You can make advance reservation deposits required by default on group orders, as well as determine rules for calculating the deposit amount and due date. If you require an advance reservation deposit by default, you can specify whether it is a percentage of the order amount or a flat amount. For the deposit due date, you configure rules to calculate the due date based on the order creation date or the date the group visit occurs.

Tip: The reservation deposit defaults you configure can be changed during the group sales process. They are simply defaults designed to help your organization maintain a consistent policy for collecting deposits for group orders.

> Configure reservation deposit defaults for group orders

1. From *Sales*, click **Group sales**. The Group Sales page appears.
2. Under **Configuration**, click **Group sales settings**. The Group Sales Settings page appears and opens to the Reservation Defaults tab.
3. In the **Reservation defaults** section, click **Edit**. The Edit reservation defaults screen appears.

Edit reservation defaults

<p><u>Reservation deposit</u></p> <p><input checked="" type="checkbox"/> Reservation deposit required</p> <p>Due date: <input type="text" value="0"/> Days before visit ▾</p> <p>Type: <input type="text" value="Amount"/> ▾</p> <p>Value: <input type="text" value="\$50.00"/></p> <p><u>Security deposit</u></p> <p><input checked="" type="checkbox"/> Security deposit required</p> <p>Due date: <input type="text" value="0"/> Days after order creation ▾</p> <p>Type: <input type="text" value="Amount"/> ▾</p> <p>Value: <input type="text" value="\$5.00"/></p>	<p><u>Contract</u></p> <p><input checked="" type="checkbox"/> Contract required</p> <p>Due date: <input type="text" value="30"/> Days before visit ▾</p> <p>Default template: <input type="text" value="Group sales contract with itinerary"/> 🔍</p> <p>Attachment type: <input type="text" value="Contract"/> ▾</p> <p><u>Final count</u></p> <p><input type="checkbox"/> Final count required</p> <p>Due date: <input type="text" value="0"/> Days before visit ▾</p> <p><u>Order balance</u></p> <p>Balance due: <input type="text" value="0"/> Days before visit ▾</p>
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4. To require a deposit by default when a group reservation is added, select **Reservation deposit required**. If you select this checkbox, the **Due date**, **Type**, and **Value** fields are accessible.
5. Under **Reservation deposit**, in the **Due date** fields, you configure rules to calculate the due date for group reservation deposits. You can calculate the default due date based on a specific number of days after the order is created or a specific number of days before the group visit occurs. In the **Due date** field, enter a specific number of days and then select "Days before visit" or "Days after order creation."
6. In the **Type** field, select whether the deposit is a flat amount or a percentage of the total order.
7. In the **Value** field, enter the flat amount for the deposit or the percentage of the total order that will be required by default.
8. Click **Save**.

Configure Security Deposit Defaults

Some organizations collect a security deposit from groups which is held until the completion of the group's visit, and returned if all facilities and property are maintained during the visit.

You can make security deposits required by default on group orders, as well as determine rules for calculating the deposit amount and due date for the deposit. If you require a security deposit by default, you can specify whether it is a percentage of the order amount or a flat amount. For the

deposit due date, you configure rules to calculate the due date based on the order creation date or the date the group visit occurs.

Tip: The security deposit defaults you configure can be changed during the group sales process. They are simply defaults designed to help your organization maintain a consistent policy for collecting security deposits for group orders.

➤ Configure security deposit defaults for group orders

1. From *Sales*, click **Group sales**. The Group Sales page appears.
2. Under **Configuration**, click **Group sales settings**. The Group Sales Settings page appears and opens to the Reservation Defaults tab.
3. In the **Reservation defaults** section, click **Edit**. The Edit reservation defaults screen appears.

Edit reservation defaults

Reservation deposit	Contract
<input checked="" type="checkbox"/> Reservation deposit required	<input checked="" type="checkbox"/> Contract required
Due date: 0 Days before visit	Due date: 30 Days before visit
Type: Amount	Default template: Group sales contract with itinerary
Value: \$50.00	Attachment type: Contract
Security deposit	Final count
<input checked="" type="checkbox"/> Security deposit required	<input type="checkbox"/> Final count required
Due date: 0 Days after order creation	Due date: 0 Days before visit
Type: Amount	Order balance
Value: \$5.00	Balance due: 0 Days before visit

Save Cancel

4. To require a security deposit by default when a group reservation is added, select **Security deposit required**. If you select this checkbox, the **Due date**, **Type**, and **Value** fields are accessible.
5. Under **Security deposit**, in the **Due date** fields, you configure rules to calculate the due date for group order security deposits. You can calculate the default due date based on a specific number of days after the order is created or a specific number of days before the group visit occurs. In the **Due date** field, enter a specific number of days and then select "Days before visit" or "Days after order creation."
6. In the **Type** field, select whether the security deposit is a flat amount or a percentage of the total order.

7. In the **Value** field, enter the flat amount for the security deposit or the percentage of the total order that will be required by default.
8. Click **Save**.

Configure Contract Defaults

Some organizations send contracts out to formalize and confirm group orders. If your organization uses contracts as part of your group sales process, you can configure settings to make them required by default. If you use a specific contract template for the majority of your contracts, you can set that template as the default to use on all group reservations. Additionally, you can configure rules to determine the due date for receiving contracts.

Tip: The contract defaults you configure can be changed during the group sales process. They are simply defaults designed to help your organization maintain a consistent policy for sending and receiving contracts for group orders.

➤ Configure contract defaults for group orders

1. From *Sales*, click **Group sales**. The Group Sales page appears.
2. Under **Configuration**, click **Group sales settings**. The Group Sales Settings page appears and opens to the Reservation Defaults tab.
3. In the **Reservation defaults** section, click **Edit**. The Edit reservation defaults screen appears.

Edit reservation defaults

<p><u>Reservation deposit</u></p> <p><input checked="" type="checkbox"/> Reservation deposit required</p> <p>Due date: <input type="text" value="0"/> Days before visit</p> <p>Type: <input type="text" value="Amount"/></p> <p>Value: <input type="text" value="\$50.00"/></p> <p><u>Security deposit</u></p> <p><input checked="" type="checkbox"/> Security deposit required</p> <p>Due date: <input type="text" value="0"/> Days after order creation</p> <p>Type: <input type="text" value="Amount"/></p> <p>Value: <input type="text" value="\$5.00"/></p>	<p><u>Contract</u></p> <p><input checked="" type="checkbox"/> Contract required</p> <p>Due date: <input type="text" value="30"/> Days before visit</p> <p>Default template: <input type="text" value="Group sales contract with itinerary"/></p> <p>Attachment type: <input type="text" value="Contract"/></p> <p><u>Final count</u></p> <p><input type="checkbox"/> Final count required</p> <p>Due date: <input type="text" value="0"/> Days before visit</p> <p><u>Order balance</u></p> <p>Balance due: <input type="text" value="0"/> Days before visit</p>
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4. To require a contract by default when a group reservation is added, select **Contract required**. If you select this checkbox, the **Due date**, **Template**, and **Attachment** fields are accessible.
5. Under **Contract**, in the **Due date** fields, you configure rules to calculate the due date for group order contracts. You can calculate the default due date based on a specific number of days after the order is created or a specific number of days before the group visit occurs. In the **Due date** field, enter a specific number of days and then select "Days before visit" or "Days after order creation."
6. If you use a specific contract template for the majority of your contracts, you can designate a template to use as the default for all group reservations. In the **Template** field, click the magnifying glass. The Letter Template Search screen appears.
7. In the **Letter type** field, make sure "Group sales contract" is selected and click **Search**. In the results grid, highlight the template to use as the default and click **Select**. You return to the Edit contract defaults screen.
8. In the **Attachment type** field, select the attachment type to use for group contracts. Typically, your system administrator configures the types available. If a contract attachment type has not yet been added to the system and you have the necessary security rights, you can add a new type by entering it in this field.
9. Click **Save**.

Configure Final Count Defaults

When an organization books a group visit, they provide the number of planned attendees. In many cases, the number of attendees will change prior to the actual visit, which affects the cost of the group visit and capacity available. To help avoid capacity issues and to make sure the group is aware of the actual cost of their visit, many organizations require that the "final count" of attendees be provided by a deadline.

To make sure you receive a group's final count, you can make it required by default for group reservations. If required, you configure rules to calculate the due date based on the order creation date or the date the group visit occurs.

Tip: The final count defaults you configure can be changed during the group sales process. They are simply defaults designed to help your organization maintain a consistent policy for collecting the final count for group orders.

➤ Configure final count defaults for group orders

1. From *Sales*, click **Group sales**. The Group Sales page appears.
2. Under **Configuration**, click **Group sales settings**. The Group Sales Settings page appears and opens to the Reservation Defaults tab.
3. In the **Reservation defaults** section, click **Edit**. The Edit reservation defaults screen appears.

Edit reservation defaults

Reservation deposit

Reservation deposit required

Due date: 0 Days before visit

Type: Amount

Value: \$50.00

Contract

Contract required

Due date: 30 Days before visit

Default template: Group sales contract with itinerary

Attachment type: Contract

Security deposit

Security deposit required

Due date: 0 Days after order creation

Type: Amount

Value: \$5.00

Final count

Final count required

Due date: 0 Days before visit

Order balance

Balance due: 0 Days before visit

Save Cancel

4. To require a final count by default for group reservations, select **Final count required**. If you select this checkbox, the **Due date** fields are accessible.
5. In the **Due date** fields, you configure rules to calculate the due date for the final count. You can calculate the default due date based on a specific number of days after the order is created or a specific number of days before the group visit occurs. In the **Due date** field, enter a specific number of days and then select "Days before visit" or "Days after order creation."
6. Click **Save**.

Configure Order Balance Payment Defaults

You can configure rules to determine when the order balance is due for a group reservation. You can configure the final payment to be due on a specific number of days before the visit, a specific number of days after the order is created, or on a specific number of days after the deposit is received.

If you do not configure defaults for when the order balance is due, the default will be "0" days before the event, which means it is due on the day of the event.

Tip: The final payment defaults you configure can be changed during the group sales process. They are simply defaults designed to help your organization maintain a consistent policy for collecting final payments for group orders.

➤ Configure order balance payment defaults for group orders

1. From *Sales*, click **Group sales**. The Group Sales page appears.

2. Under **Configuration**, click **Group sales settings**. The Group Sales Settings page appears and opens to the Reservation Defaults tab.
3. In the **Reservation defaults** section, click **Edit**. The Edit reservation defaults screen appears.

Edit reservation defaults

Reservation deposit

Reservation deposit required

Due date: 0 Days before visit

Type: Amount

Value: \$50.00

Contract

Contract required

Due date: 30 Days before visit

Default template: Group sales contract with itinerary

Attachment type: Contract

Security deposit

Security deposit required

Due date: 0 Days after order creation

Type: Amount

Value: \$5.00

Final count

Final count required

Due date: 0 Days before visit

Order balance

Balance due: 0 Days before visit

Save Cancel

4. Under **Order balance**, in the **Balance due** fields, you configure rules to determine when the final payment for the group order must be received. In many cases, the final payment for a group order is due at the time of the visit. If this is the case with your organization, leave the **Balance due** fields set to "0" and "Days before visit" respectively.

If your organization requires that the order balance be paid before the time of the visit, you can use the **Balance due** fields to require full payment based on a specific number of days after the order is created or a specific number of days before the group visit occurs. If you require an advance deposit by default, you can also select "Days after deposit is due" to determine the final payment due date.

5. Click **Save**.

Configure Quick Itinerary Defaults

With a "quick itinerary" you can add a single itinerary item for a group visit when you add a reservation. This is helpful if you commonly process group reservations with a single itinerary item like a daily admission program.

On the Reservation Defaults tab, you can set default arrival and departure times for a group when a daily admission program is selected in the **Quick itinerary** field on a reservation. These defaults apply only when you select a general admission program in the **Quick itinerary** field. If you select a

scheduled program event, the arrival and departure times that appear are based on the start and end times of the event.

➤ Configure quick itinerary defaults for group orders

1. From *Sales*, click **Group sales**. The Group Sales page appears.
2. Under **Configuration**, click **Group sales settings**. The Group Sales Settings page appears and opens to the Reservation Defaults tab.
3. In the **Quick itinerary defaults** section, click **Edit**. The Edit quick itinerary defaults screen appears.
4. In the daily admission arrival and departure time fields, enter the most common group arrival and departure times for your daily admission programs. When adding a reservation, the times you enter here will be used as the defaults when you select a daily admission program in the **Quick itinerary** field. These times are defaults only and are meant to help make your process more efficient. The default times can be changed when adding a reservation.

Note: These defaults arrival and departure times apply only when you select a general admission program in the **Quick itinerary** field when adding a reservation. If you select a scheduled program event, the arrival and departure times that appear are based on the start and end times of the event.

5. Click **Save**.

Set Capacity Constraints and Resource Requirements

With capacity constraints, you set the maximum number of people per day for all group sales. Capacity constraints only limit the number of attendees for all groups who have reservations for a day. They do not limit the number of advance or walk up sales. For example, based on experience, you know staff and the property can handle up to 500 people in one or many groups per day. You set the maximum at 500. When you create group sale reservations, you then see how much capacity is available for each day. To set the capacity, on the Capacity Constraints tab, click **Edit**. Enter the maximum number of people and click **Save**.

With resource requirements, you determine what supplies/equipment and staff resources you need for each group type. For example, you require specific supplies/equipment and staffing resources for whenever an elementary school visits. You set up the group types on the Group Type code table in *Administration*. We recommend you set up as many distinct group types as you need. For example, if you often host school visits, set up multiple group types for the different grade ranges because you may have different requirements for elementary, middle, and high school groups.

➤ Add required resources for a particular group

1. From *Sales*, click **Group sales**. The Group Sales page appears.
2. Under **Configuration**, click **Group sales settings**. The Group Sales Settings page appears.
3. Select the Capacity and Resources tab.

- In the **Resource requirements** grid, on the action bar, click **Add**. The Add required resources for a particular group screen appears.

Add required resources for a particular group

Group type: ▼

Supplies/Equipment resources

Resource	Quantity needed

Staffing resources

Resource	Quantity needed	Filled by	Job being performed	Job Name	Description

Save Cancel

- Select the group type for which to add required resources.
- In the **Supplies/Equipment resources** grid, search for and select each supply/equipment resource that is required for the selected group type.
- In the **Quantity needed** field, enter how many resources are required for the group type.
- In the Staffing resources grid, select each staff resource that is required and enter the quantity needed. In the **Filled by** field, select who can perform as the resource such as a volunteer, a staff member, or a board member.
- For staffing resources, select the job being performed or enter the **Job Name** and **Description** of the job. For example, you need a volunteer to help when the group type is Elementary. For the job being performed, you select School Visit Chaperone.

Note: If you select a job being performed, the name and description default from the job type.

- Click **Save**.

➤ Edit required resources for a particular group

- From *Sales*, click **Group sales**. The Group Sales page appears.

2. Under **Configuration**, click **Group sales settings**. The Group Sales Settings page appears.
3. Select the Capacity and Resources tab.
4. In the grid, select the group type to edit.
5. In the **Resource Requirements** grid, on the action bar, click **Edit**. The Edit required resources for a particular group screen opens.
6. In the **Supplies/Equipment resources** grid, edit the resources as needed. You can search for and select a new supply/equipment resource or remove an existing resource. To change the quantity of a resource, edit the **Quantity needed** field.
7. In the Staffing resources grid, edit staff resources as needed. You can select a new staff resource or remove an existing resource. You can also change the quantity needed. In the **Filled by** field, you can edit who can perform as the resource such as a volunteer, a staff member, or a board member.
8. For staffing resources, you can edit the job being performed or edit the **Job Name** and **Description**. For example, you need a volunteer to help when the group type is Elementary. For the job being performed, you select School Visit Chaperone.

Note: If you select a job being performed, the name and description default from the job type.

9. Click **Save**.

➤ Delete required resources for a particular group

If necessary, you can delete a resource requirement from a group type. On the Capacity and Resources tab, in the **Resource Requirements** grid, select the group type requirement to delete. On the action bar, click **Delete**. A confirmation screen appears. Click **Yes**. You return to the Capacity and Resources tab and the group type requirement no longer appears.

Configure Flat Rate Pricing

The cost of a group order is calculated using per ticket pricing, flat rate pricing, or a combination of both. With per ticket pricing, the cost of a group visit is calculated based on the number of tickets included in the order. The specific cost of each ticket is determined by the price lists associated with the programs. Per ticket pricing is the default pricing structure for group sales.

Flat rate pricing is an alternative to per ticket pricing. It allows you to charge a flat amount for a group visit instead of calculating the cost per ticket using the price lists assigned to each program in the group's itinerary. At least one rate scale must be created before you can use flat rate pricing for group reservations.

You can also use a combination of flat rate and per ticket pricing. If a group exceeds the number of people for the highest rate scale, you can allow the group to pay on a per ticket basis for each additional attendee. For example, you set a rate scale of \$200 for groups up to 20 people, and a group informs you they have 22 attendees. Rather than charge a separate flat rate for groups over 20, you can charge the group on a per ticket basis for the two additional attendees.

Note: You can set the default pricing structure for group reservations to be flat rate or per ticket pricing. Regardless of the default, you can change the pricing structure for each group when you add the reservation.

To configure flat rate pricing, you set up rate scales that determine the price a group pays. You can configure different amounts within a rate scale for different size groups. For example, you can add a rate scale that is configured to charge \$200 for groups of up to 20 people, \$400 for groups that have between 21 and 50 people, and \$800 for groups that include over 50 people. Or you can set up a rate scale that simply charges all groups one standard amount regardless of size.

When you add a rate scale, you can define default applications that determine how a flat rate should be applied to the programs, fees, and resources include in a group order. These are defaults only and can be changed as needed on each group reservation. Applications ensure that all items and services purchased are accounted for properly. For example, if a group pays a \$500 flat rate for a group visit that includes three different programs, you must determine how that \$500 is split and applied to the three programs. You can edit the default applications on each rate scale record.

By default, all programs, fees, and resources are eligible for flat rate pricing. If needed, after you create a rate scale, you can limit the items that are eligible by designating specific programs, fees, and resources that can be included. If a reservation is booked using flat fee pricing, any programs that are not included in the selected rate scale will be charged on a per ticket basis.

If your organization uses one rate scale for the majority of flat rate group orders you process, you can designate that rate scale as the default. The rate scale designated as the default is automatically selected when you add a group reservation that uses the flat rate pricing structure. If a group order needs a different rate scale than the default, you can select it when adding the reservation.

Note: If you edit a rate scale that is currently in use on reservations and you want the new rate scale values to be updated on those reservations, you must access the Rate Scale tab on each reservation record, click **Change rate scale**, and select the updated rate scale. For more information, see [Change Rate Scales for Group Reservations on page 181](#).

Note: In the **Pricing** section of the Group Sales Reservation page, a **Refund** link appears if an overpayment is available for refund. However, before check-in you can refund anytime under the **Refunds** section. For information about refunds, see [Refunds for Group Sales Reservations on page 285](#).

Change the Default Pricing Structure for Group Sales

You can set the default pricing structure for group reservations to be flat rate or per ticket pricing. To make flat rate the default pricing structure, you must add at least one rate scale. For more information, see [Add Rate Scales on page 137](#).

Regardless of the default, you can change the pricing structure for each group when you add the reservation. For more information about using a flat rate pricing structure, see [Configure Flat Rate Pricing on page 135](#).

➤ Change the default pricing structure for group sales

1. From *Sales*, click **Group sales**. The Group Sales page appears.
2. Under **Configuration**, click **Group sales settings**. The Group Sales Settings page appears.
3. Select the Flat Rate Pricing tab.

4. Flat rate pricing allows you to charge a flat amount for a group visit instead of calculating the cost per ticket using the price lists assigned to each program in a group's itinerary. To set flat rate pricing as the default pricing structure for group reservations, click **Set flat rate pricing as default**. A confirmation screen appears.
5. Click **Yes**. You return to the Flat Rate Pricing tab.

Note: At any time you can change the default pricing structure back to per ticket pricing. To do so, on the Flat Rate Pricing tab, click **Set per ticket pricing as default**. With per ticket pricing, the cost of a group visit is calculated based on the number of tickets included in the order. The specific cost of each ticket is determined by the price lists associated with the programs added to the itinerary.

Add Rate Scales

To configure flat rate pricing, you set up rate scales that determine the price a group pays. You can configure different prices within a rate scale for different size groups. For example, you can add a rate scale that is configured to charge \$200 for groups of up to 20 people, \$400 for groups that have between 21 and 50 people, and \$800 for groups that include over 50 people. You can also set a rate scale that charges groups on a per ticket basis for each attendee over the highest specified quantity. Or you can set up a rate scale that simply charges all groups one standard amount regardless of size.

When you add a rate scale you also specify programs, fees, and resources that are eligible for flat rate pricing through the rate scale and set the applications for each. This is necessary to ensure that all items and services purchased are accounted for properly.

> Add a rate scale

1. From *Sales*, click **Group sales**. The Group Sales page appears.
2. Under **Configuration**, click **Group sales settings**. The Group Sales Settings page appears.
3. Select the Flat Rate Pricing tab.
4. In the **Rate scales** section, click **Add**. The Add a rate scale screen appears.

Add a rate scale

General

Name:

Description:

Set as default rate scale

Group type:

Prices

Group of any size pays:

Rate scale uses multiple prices

Applications

Application type:

Percent:

Application type	Name	Percent

Total percent: ✖ 0.00

5. Enter a name and description for the rate scale.
6. To make this the default rate scale when flat rate pricing is selected on a reservation, select **Set as default rate scale**. You can always select a different rate scale on the reservation, but setting the one you use most as the default will save a step in most cases.
7. To associate a group type requirement with a rate scale, select the group type.
8. Under **Applications**, you specify the default programs, fees, and resources for this rate scale along with the applications for each. These are defaults only and can be changed as needed on each group reservation. Applications ensure that all items and services purchased are accounted for properly. For example, if a group pays a \$500 flat rate for a group visit that includes three different programs, you must determine how that \$500 is split and applied to the three programs. In the **Application Type** field, select "Program," "Fee," "Supply/Equipment," or "Staffing resource" and select the item to include.
9. In **Percent** field, enter the percent of the flat rate that should be allocated to the selected item. For example, enter "10" if ten percent of the flat rate a group will pay should be allocated to the selected item.
10. Click **Add**. The item and the percent allocated are displayed in the grid. The total percent allocated is displayed under the grid and is updated automatically. When you have allocated 100 percent, a green checkmark appears.

Note: You can change the application configuration later for each group reservation on an individual basis. However, the entire flat rate amount that a group is charged must be fully applied and allocated before payments can be made on the reservation.

11. To use a single rate scale that charges all groups one standard amount regardless of size, enter an amount in the **Group of any size pays** field.
12. To configure multiple flat rate prices for groups based on size, click **Rate scale uses multiple prices**. The **Prices** grid appears.
13. In the grid you define the group sizes and corresponding flat rate for each. In the **Group of up to** column, enter a quantity and in the **Pays this price** column, enter the amount. For example, you can add a rate scale that is configured to charge \$200 for groups of up to 20 people and \$400 for groups that have between 21 and 50 people.
14. The **Group over 0 pays** field dynamically changes to include the largest quantity entered in the grid. Continuing with the previous example, this field would read **Group over 50 pays** and you can enter a flat amount that all groups of 50 or more will pay.
 - Rather than use a flat rate for groups over the highest specified quantity, select **Per ticket for additional attendees** to charge the group on a per ticket basis for each additional attendee.
15. Click **Save**. You return to the Flat Rate Pricing tab and the new scale is displayed.

Note: On the Flat Rate Pricing tab, select a rate scale to view details that include the group sizes configured for the rate and the prices for each. After you add a rate scale, you can go to the rate scale record to edit prices, designate the programs, fees and resources that are included in the rate scale, and configure default applications. To access a rate scale record, select a scale in the grid and click **Go to rate scale**.

Limit the Programs, Fees, and Resources Included in a Rate Scale

By default, all programs, fees, and resources are eligible for flat rate pricing through each rate scale you add. If you do not want to include all programs, fees, and resources in a rate scale, you must access each rate scale record and manually limit those that are included.

Note: If you book a group reservation using flat fee pricing, typically you add programs, fees, and resources to the reservation that are included in the selected rate scale. If needed, you can add programs to the order that are not included in the selected rate scale, however, the group will be charged on a per ticket basis for those programs.

➤ Limit the programs included in a rate scale

1. From *Sales*, click **Group sales**. The Group Sales page appears.
2. Under **Configuration**, click **Group sales settings**. The Group Sales Settings page appears.
3. Select the Flat Rate Pricing tab.
4. Under **Rate scales**, select the scale for which to limit programs and click **Go to rate scale**. The rate scale record appears.
5. Select the Included Programs tab.

6. Click **Edit**. The Edit rate scale programs screen appears.
7. Clear the **Include all programs** checkbox and select specific programs in the grid. Click the magnifying glass to search for programs to include. After you select a program, it is displayed in the grid on the Edit rate scale programs screen. Select additional programs as needed.

Note: If a reservation is booked using flat fee pricing, any programs that are not included in the selected rate scale are charged on a per ticket basis.

8. After you select each program to include, on the Edit rate scale programs screen, click **Save**. You return to the Include Programs tab. The programs that eligible for this rate scale are displayed.

➤ Limit the fees included in a rate scale

1. From *Sales*, click **Group sales**. The Group Sales page appears.
2. Under **Configuration**, click **Group sales settings**. The Group Sales Settings page appears.
3. Select the Flat Rate Pricing tab.
4. Under **Rate scales**, select the scale for which to limit fees and click **Go to rate scale**. The rate scale record appears.
5. Select the Included Fees tab.
6. Click **Edit**. The Edit rate scale fees screen appears.
7. Clear the **Include all fees** checkbox and select specific fees in the grid.
8. After you select each program to include, click **Save**. You return to the Include Fees tab. The fees that eligible for this rate scale are displayed.

➤ Limit the supplies/equipment resources included in a rate scale

1. From *Sales*, click **Group sales**. The Group Sales page appears.
2. Under **Configuration**, click **Group sales settings**. The Group Sales Settings page appears.
3. Select the Flat Rate Pricing tab.
4. Under **Rate scales**, select the scale for which to limit supplies/equipment resources and click **Go to rate scale**. The rate scale record appears.
5. Select the Included Resources tab.
6. Next to **Included supplies/equipment resources**, click **Edit**. The Edit rate scale supplies/equipment resources screen appears.
7. Clear the **Include all supplies/equipment resources** checkbox and select specific resources in the grid. Click the magnifying glass to search for resources to include. After you select a resource, it is displayed in the grid on the Edit rate scale supplies/equipment resources screen. Select additional resources as needed.
8. After you select each supply/equipment resource to include, on the Edit rate scale supplies/equipment resources screen, click **Save**. You return to the Include Resources tab. The supplies/equipment resources that are eligible for this rate scale are displayed.

➤ Limit the staffing resources included in a rate scale

1. From *Sales*, click **Group sales**. The Group Sales page appears.
2. Under **Configuration**, click **Group sales settings**. The Group Sales Settings page appears.
3. Select the Flat Rate Pricing tab.
4. Under **Rate scales**, select the scale for which to limit supplies/equipment resources and click **Go to rate scale**. The rate scale record appears.
5. On the Included Resources tab, next to **Included staffing resources**, click **Edit**. The Edit rate scale staffing resources screen appears.
6. Clear the **Include all staffing resources** checkbox and select specific resources in the grid.
7. After you select each staff resource to include, click **Save**. You return to the Include Resources tab. The staffing resources that are eligible for this rate scale are displayed.

Configure Default Flat Rate Applications

On the Default Applications tab of a rate scale record, you can edit the default applications for specific programs, fees, and resources that are eligible for the selected rate scale. Configuring default applications is helpful if your organization routinely sells the same itinerary to multiple groups. These are defaults only and can be changes as needed on each group reservation.

Accurately applying the flat rate amount a group pays is necessary to ensure that all items and services purchased are accounted for properly. For example, if a group pays a \$500 flat rate for a group visit that includes three different programs, you must determine how that \$500 is split and applied to the three programs.

➤ Configure default flat rate applications

1. From *Sales*, click **Group sales**. The Group Sales page appears.
2. Under **Configuration**, click **Group sales settings**. The Group Sales Settings page appears.
3. Select the Flat Rate Pricing tab.
4. Under **Rate scales**, select the scale for which to configure default flat rate applications and click **Go to rate scale**. The rate scale record appears.
5. Select the Default Applications tab. Any previously added default applications are displayed.
6. Click **Edit**. The Edit rate scale applications screen appears.

Edit rate scale applications

Application type:

Percent:

Application type	Name	Percent
Program	Admission	50.00
Program	Sharks - Monsters...	25.00
Program	Sea Turtles Tank T...	20.00
Supply/Equipment...	Workbook	5.00

Total percent: 100.00

7. On this screen you specify the default programs, fees, and resources for this rate scale along with the applications for each. These are defaults only and can be changed as needed on each group reservation. In the **Application Type** field, select "Program," "Fee," "Supply/Equipment," or "Staffing resource" and select the item to include.
8. In **Percent** field, enter the percent of the flat rate that should be allocated to the selected item. For example, enter "10" if ten percent of the flat rate a group will pay should be allocated to the selected item.
9. Click **Add**. The item and the percent allocated are displayed in the grid. The total percent allocated is displayed under the grid and is updated automatically. When you have allocated 100 percent, a green checkmark appears.
10. You can also edit the applications in the grid by adjusting the entries in the **Percent** column. To remove an application, select a row and click delete on your keyboard.
11. After you configure the default flat rate applications, on the Edit rate scale applications screen, click **Save**. You return to the Default Applications tab.

Edit Rate Scales

After you add rate scales, you can edit them as needed to adjust the name and description or change the setting that designates a rate scale as the default. You can also edit the default programs, fees, and resources for this rate scale and set the applications for each. Applications are necessary to ensure that all items and services purchased are accounted for properly. The applications you configure on the rate scale are defaults only and can be changed as needed on each group reservation.

Delete Rate Scales

If necessary, you can delete a rate scale that is not in use. On the Group Sales Settings page, select the Flat Rate Pricing tab. Under **Rate scales**, select the scale to delete and on the action bar, click **Delete**. You cannot delete flat rate scales that are currently in use. Instead, you can make them inactive.

Configure Facility Prices

As an additional source of revenue, many organizations rent out space within their facilities for various events like weddings or corporate meetings. If your organization engages in facility rentals, you can configure default prices for the locations you commonly rent. This helps standardize the amounts charged for rentals and save data entry time.

A facility rental starts as a standard group reservation. After you add a reservation, you then customize the group itinerary by adding a custom item for the specific rental period. On the custom item, you also select the location they are renting. If you configured a default facility price for the location, the price automatically appears. However, you can change the default price as needed on the itinerary.

> Add facility prices

1. From *Sales*, click **Group sales**. The Group Sales page appears.
2. Under **Configuration**, click **Facility prices**. The Facility Prices page appears.
3. Click **Add**. The Add a facility price screen appears.
4. In the **Location** field, click the magnifying glass. The Event Location screen appears. Use the filters and search criteria to find the location for which to define a facility price. In the search results grid, select the location and click **Select**. You return to the Add facility price screen and the location is displayed.
5. In the **Price** field, enter the default price to charge for this location. Because most organizations typically charge a single standard amount for a facility rental, you can define only a single default price for each location. However, if needed, you can change the amount charged for a location on the group itinerary by clicking **Override cost** on the Order Details tab of the reservation.
6. Click **Save**. You return to the Facility Prices page. The price you added for a location is displayed in the grid.

➤ Edit facility prices

1. From *Sales*, click **Group sales**. The Group Sales page appears.
2. Under **Configuration**, click **Facility prices**. The Facility Prices page appears.
3. In the grid, select a facility price and click **Edit**. The Edit a facility price screen appears.
4. In the **Price** field, edit the default price to charge for this location. Because most organizations typically charge a single standard amount for a facility rental, you can define only a single default price for each location. However, if needed, you can change the amount charged for a location on the group itinerary or by clicking **Override cost** on the Order Details tab of the reservation.
5. Click **Save**. You return to the Facility Prices page. The price you edited for the location is displayed in the grid.

➤ Delete facility prices

If necessary, you can delete a facility price that is no longer needed. For example, this may be necessary if your organization decides to no longer rent out a specific location. To delete a price, access the Facility Prices page. In the grid select the price to delete. On the action bar, click **Delete**. A confirmation screen appears. Click **Yes**. The price is no longer displayed in the grid.

Build Group Itinerary Tracks

Group itinerary tracks are like templates you build and use to efficiently schedule itineraries for group visits. Tracks are especially helpful if your organization gets a large number of groups requesting the same type of group visit. For example, third grade classes from all schools within a nearby school district may want a similar experience when they visit your organization. In this case, when the itinerary for a visit is essentially the same for each class, you can save time by building a “Third Grade Class” track. The track can then be loaded when scheduling a group itinerary on a reservation. When new third grade classes continue to visit year after year, you can efficiently load the relevant track.

You can also use tracks to develop specific curriculum-based visits that will be the same for each group. For example, your organization may put together a “Birds of Prey” or “When Dinosaurs Roamed” track that involves admission programs, scheduled events, and custom items that follow the specific theme.

The process of building a track is basically the same as scheduling a group itinerary. You add a track and then schedule the daily programs, scheduled events, and custom items that will be part of that track. Once a track is created, you can load it when scheduling a group itinerary. For more information about loading tracks, see [Load a Track for a Group Itinerary on page 204](#).

Tip: If you have already created an itinerary that would make a good track, you can save the itinerary as a track. Once the itinerary is saved as a track, you can edit it from the Tracks page. For more information, see [Save a Group Itinerary as a Track on page 213](#).

Add Group Itinerary Tracks

When you add a group itinerary track, you specify a name for the track and enter a description. Because tracks will be loaded on itineraries by different users, you should make sure the name clearly represents the purpose of the track. After you add a track, you can add daily admission programs, scheduled events, and custom items to define the track schedule. For more information, see [Schedule Group Itinerary Tracks on page 152](#).

➤ Add a group itinerary track

1. From *Sales*, click **Group sales**. The Group Sales page appears.
2. Under **Configuration**, click **Manage tracks**. The Tracks page appears.
3. On the action bar, click **Add**. The Add a track screen appears.
4. Enter a name and description for the track. Because tracks are loaded on itineraries by different users, you should make sure the name clearly represents the purpose of the track.
5. Click **Save** and "Day 1" of the track itinerary is displayed. You can now add daily admission programs, scheduled events, and custom items to define the track schedule. For more information, see [Schedule Group Itinerary Tracks on page 152](#).

Schedule Group Itinerary Tracks

With tracks, you create templates that are used to quickly load a specific itinerary for a group visit. Once a group track is added, you schedule daily admission programs, scheduled events, and custom items to define the track schedule.

For example, you can create a "Dinosaur Fossil Hunt" track that provides a curriculum-based experience centered on dinosaurs and the hunt for fossils. A typical itinerary for this track may start off with a custom item for arrival from 8:30 to 9:00. This would be followed by a daily admission program, which is admission to the Dinosaur Hall, from 9:00 to 12:00. This gives the group three hours to explore the dinosaur exhibits. For lunch, another custom item is added to the itinerary from 12:00 to 12:45. After lunch, the group attends two timed program events, a fossil hunt from 1:00 to 1:30 and then the Extreme T-Rex IMAX film from 2:00 to 3:00.

Tip: Custom items are used to schedule things that are not daily admission programs or program events. For example, you can use custom items to schedule meals, gift shop visits, informal tours, meet-ups, or anything else that is needed.

Typically, a group visit involves one day. However, you can schedule a multi-day itinerary track that spans up to five days. To schedule a multi-day track, you add programs and custom events for each day included in the itinerary. When you add each program or custom item, you select "Day 1," "Day 2," etc. When you save the program, the new day is added to the itinerary and displayed on the calendar view.

Tip: If you have already created an itinerary that would make a good track, you can save the itinerary as a track. Once the itinerary is saved as a track, you can edit it from the Tracks page. For more information, see [Save a Group Itinerary as a Track on page 213](#).

Schedule Daily Admission Programs for a Group Track

When you schedule daily admission programs for a group track, you select from a list of programs that have already been added to the system. Once you select a daily admission program, you enter start and end times that are specific to the group. If you are building a multi-day track, you also select the day that the program will occur. A multi-day track is limited to five days.

Unlike scheduled programs that have specific timed events, daily admission programs are usually untimed. Although daily admission programs are untimed, when you add one to a group track, you must specify start and end times. For example, an aquarium may have a daily admission program that is untimed and sold all day. These tickets grant access to the facility and the patrons can visit the exhibits throughout the day. However, for a group visit, you must provide start and end times so the group has a set duration to explore the exhibits. This allows for the scheduling of lunch and other events the group may want to attend.

You can edit the daily admission programs on a group track as needed. You can also remove programs from the track.

➤ Add a daily admission program to a group track

1. From *Sales*, click **Group sales**. The Group Sales page appears.
2. Under **Configuration**, click **Manage tracks**. The Tracks page appears.
3. In the grid, select the track to add a daily admission program to and on the action bar, click **Go to track**. The track page appears.
4. On the calendar view, select a block of time for the daily admission program. For example, click 9:00 and drag the cursor down to 11:00 to create a two hour program.

Note: Although daily admission programs are usually untimed, when you add one to a group track, you must specify a duration with start and end times.

5. On the action bar, click **Add** then select **Daily admission program**. The Add a daily admission program screen appears.
6. In the **Program** field, select the daily admission program to add to the track. Only daily admission programs that are available through the "Group Sales" sales method are displayed in the list.
7. If this is a multi-day track, you can select a day for this program in the **Day** field. A multi-day track is limited to five days. For example, to schedule this program for the second day of a multi-day track, you would select "Day 2" in the **Day** field. When you save the program, the new day is added to the track.
8. The start and end times are automatically displayed based on the duration you selected on the calendar. For example, if you selected a three hour block of time from 9:00 to 12:00 on the calendar, the **Start time** and **End time** fields will display 9:00 and 12:00 respectively. You can change the start and end times as needed.
9. In the **Notes** field, enter any additional information related to the group program like special requirements or other relevant information. The notes entered here are displayed on the track calendar view. When this track is loaded onto an itinerary, notes entered here are also

displayed on the itinerary calendar view, as well as on the printed itinerary. The notes can be changed on the itinerary as needed.

10. On the Resources tab, add as many resources, supplies/equipment or staffing, as you need for the daily admission program. In the **Supplies/Equipment resources** grid, enter the resource or click the magnifying glass to use the Resource Search screen to find and select the resource. If you selected a per ticket resource, the per ticket quantity needed from the resource displays. If you did not select a per ticket resource, enter the number of resources for the event.

In the **Staffing resources** grid, select a resource. For each staffing resource, you can enter the quantity needed, the type of staff to fill the resource, and the job being performed. When you select the job being performed, the name and the description default from when you set up the job type. If you do not select a job being performed, you can enter the name and description manually.

11. Click **Save**.

➤ Edit a daily admission program on a group track

1. From *Sales*, click **Group sales**. The Group Sales page appears.
2. Under **Configuration**, click **Manage tracks**. The Tracks page appears.
3. In the grid, select the track to edit on the action bar, click **Go to track**. The track page appears.
4. On the track calendar view, select the daily admission program to change and on the action bar, click **Edit**. The Edit a daily admission program screen appears.
5. In the **Program** field, you can select a different daily admission program for the track. Only daily admission programs that are available through the "Group Sales" sales method are displayed in the list.
6. If this is a multi-day track, you can select a different day for the program in the **Day** field. A multi-day track is limited to five days. For example, to schedule this program for the second day of a multi-day track, you would select "Day 2" in the **Day** field.
7. You can change the duration of the program by adjusting start and end times as needed. Although daily admission programs are usually untimed, when you add one to an track, you must specify a duration by entering start and end times.
8. In the **Notes** field, enter any additional information related to the group program like special requirements or other relevant information. The notes entered here are displayed on the track calendar view. When this track is loaded onto an itinerary, notes entered here are also displayed on the itinerary calendar view, as well as on the printed itinerary. The notes can be changed on the itinerary as needed.
9. On the Resources tab, add, edit, or delete as many resources as you need for the daily admission program.
10. Click **Save**.

➤ Delete a daily admission program from a group track

If a specific daily admission program is no longer needed on a track, you can delete it. Group itineraries created using the track are not affected.

1. From *Sales*, click **Group sales**. The Group Sales page appears.
2. Under **Configuration**, click **Manage tracks**. The Tracks page appears.
3. In the grid, select the track that contains the daily admission program to remove and on the action bar, click **Go to track**. The track page appears.
4. On the track calendar view, select the daily admission program to remove and on the action bar, click **Delete**. A confirmation screen appears.
5. Click **Yes**. The daily admission program is removed from the track.

Schedule Program Events for a Group Track

When you add a program event to a group track, you select from scheduled program events that have already been added to the system. For example, your organization may have a “Sea Turtles” exhibit that occurs three times a day on Mondays and Wednesdays. To add the “Sea Turtles” event to a group itinerary, you select the “Sea Turtles” program and then enter the start and end times.

Additionally, only programs that are available through the “Group Sales” sales method can be added to a group track. If needed, you can also make the event unavailable to other groups.

Note: When a track is loaded onto an itinerary, a validation check occurs to verify that the program events on the track exist at the times specified. The check also verifies that events have the necessary capacity to accommodate the group.

You can edit the program events on a group track as needed. You can also remove programs from the track.

➤ Add a program event to a group track

1. From *Sales*, click **Group sales**. The Group Sales page appears.
2. Under **Configuration**, click **Manage tracks**. The Tracks page appears.
3. In the grid, select the track to add a program event to and on the action bar, click **Go to track**. The track page appears.
4. On the calendar view, select a block of time for the program event. For example, click 9:00 and drag the cursor down to 11:00 to add a program event to the track that takes place during that selected period of time.
5. On the action bar, click **Add** then select **Scheduled program**. The Add a scheduled event screen appears.
6. In the **Program** field, select the scheduled program to add to the track. Only scheduled programs that are available through the “Group Sales” sales method are displayed in the list.
7. In the **Start time** and **End time** fields, select the day the event occurs and the start and end times. The start and end times are automatically displayed based on the duration you selected on the calendar. You can change the start and end times as needed.
 - If this is a multi-day track, you can select a different day for the program to occur. For example, to schedule a program for the second day of a multi-day track, you would select “Day 2.” A multi-day track is limited to five days.

- If the event spans multiple days, select the appropriate days in each field. For example, to schedule a program that spans the first two days of a multi-day track, you would select "Day 1" in the **Start time** field and "Day 2" in the **End time** field.
8. If this event is available only to this group, select **Mark event unavailable to other groups**. If you select this checkbox, this event is blocked from being sold to other groups.
 9. In the **Notes** field, enter any additional information related to the program event like special requirements or other relevant information. The notes entered here are displayed on the track calendar view. When this track is loaded onto an itinerary, notes entered here are also displayed on the itinerary calendar view, as well as on the printed itinerary. The notes can be changed on the itinerary as needed.
 10. On the Additional Resources tab, add as many resources, supplies/equipment or staffing, as you need for the scheduled program event. In the **Supplies/Equipment resources** grid, enter the resource or click the magnifying glass to use the Resource Search screen to find and select the resource. If you selected a per ticket resource, the per ticket quantity needed from the resource displays. If you did not select a per ticket resource, enter the number of resources for the event.

In the **Staffing resources** grid, select a resource. For each staffing resource, you can enter the quantity needed, the type of staff to fill the resource, and the job being performed. When you select the job being performed, the name and the description default from when you set up the job type. If you do not select a job being performed, you can enter the name and description manually.
 11. Click **Save**.

➤ Edit a program event on a group track

1. From *Sales*, click **Group sales**. The Group Sales page appears.
2. Under **Configuration**, click **Manage tracks**. The Tracks page appears.
3. In the grid, select the track to edit on the action bar, click **Go to track**. The track page appears.
4. On the track calendar view, select the program event to change and on the action bar, click **Edit**. The Edit scheduled event screen appears.
5. In the **Program** field, you can select a different scheduled program for the track. Only scheduled programs that are available through the "Group Sales" sales method are displayed in the list.
6. In the **Start time** and **End time** fields, you can adjust the day the event occurs and the start and end times.
 - If this is a multi-day track, you can select a different day for the program to occur. For example, to schedule a program for the second day of a multi-day track, you would select "Day 2." A multi-day track is limited to five days.
 - To make the event span multiple days, select different days in each field. For example, to schedule a program that spans the first two days of a multi-day track, you would select "Day 1" in the **Start time** field and "Day 2" in the **End time** field.
7. In the **Notes** field, enter any additional information related to the program event like special requirements or other relevant information. The notes entered here are displayed on the track calendar view. When this track is loaded onto an itinerary, notes entered here are also

displayed on the itinerary calendar view, as well as on the printed itinerary. The notes can be changed on the itinerary as needed.

8. On the Additional Resources tab, add, edit, or delete as many resources as you need for the scheduled program event.
9. Click **Save**.

➤ Delete a program event from a group track

1. From *Sales*, click **Group sales**. The Group Sales page appears.
2. Under **Configuration**, click **Manage tracks**. The Tracks page appears.
3. In the grid, select the track that contains the program event to remove and on the action bar, click **Go to track**. The track page appears.
4. On the track calendar view, select the program event to remove and on the action bar, click **Delete**. A confirmation screen appears.
5. Click **Yes**. The program event is removed from the track.

Schedule Custom Items for a Group Track

Custom items provide the flexibility to schedule items for a group track that are not daily admission programs or program events. For example, you can use custom items to schedule meals, gift shop visits, informal tours, meet-ups, or anything else that is needed.

When you add a custom item to a track, you select a location where the custom item will take place. For example, you may add a custom item for lunch that takes place in a courtyard or picnic area. Before you can add a custom item and assign it a location, a user with the required system permissions must add locations to the system.

Tip: When you schedule a custom item and select a location, you can mark the location as unavailable. This prevents other groups from scheduling a custom item at the same location during the same time period.

You can edit the custom items on a group track as needed. You can also remove items from the track.

➤ Add a custom item to a group track

1. From *Sales*, click **Group sales**. The Group Sales page appears.
2. Under **Configuration**, click **Manage tracks**. The Tracks page appears.
3. In the grid, select the track to add a custom item to and on the action bar, click **Go to track**. The track page appears.
4. On the calendar view, select a block of time for the custom item. For example, click 11:30 and drag the cursor down to 12:30 to add a custom item to the track that takes place during that selected period of time.
5. On the action bar, click **Add** then select **Custom item**. The Add a custom item screen appears.
6. In the **Name** field, enter a name for this custom item, for example, "Lunch" or "Building Tour."

7. In the **Start time** and **End time** fields, select the day the custom item occurs and the start and end times. The start and end times are automatically displayed based on the duration you selected on the calendar. You can change the start and end times as needed.
 - If this is a multi-day track, you can select a different day for the item to occur. For example, to schedule a custom item for the second day of a multi-day track, you would select "Day 2." A multi-day track is limited to five days.
 - If the item spans multiple days, select the appropriate days in each field. For example, to schedule a custom item that spans the first two days of a multi-day track, you would select "Day 1" in the **Start time** field and "Day 2" in the **End time** field.
8. In the **Location** field, select the location where the custom item will take place. Click the magnifying glass to search for a specific location.
9. To prevent other groups from scheduling a custom item at the same location during the same time period, select **Mark location unavailable to other groups**. If you select this checkbox, the selected location is unavailable for other groups to use during this time.
10. In the **Notes** field, enter any additional information related to the group custom item like special requests or other relevant information. The notes entered here are displayed on the itinerary calendar view, as well as on the printed itinerary.
11. On the Resources tab, add as many resources, supplies/equipment or staffing, as you need for the custom item. In the **Supplies/Equipment resources** grid, enter the resource or click the magnifying glass to use the Resource Search screen to find and select the resource. If you selected a per ticket resource, the per ticket quantity needed from the resource displays. If you did not select a per ticket resource, enter the number of resources for the item.

In the **Staffing resources** grid, select a resource. For each staffing resource, you can enter the quantity needed, the type of staff to fill the resource, and the job being performed. When you select the job being performed, the name and the description default from when you set up the job type. If you do not select a job being performed, you can enter the name and description manually.
12. Click **Save**.

► Edit a custom item on a group track

1. From *Sales*, click **Group sales**. The Group Sales page appears.
2. Under **Configuration**, click **Manage tracks**. The Tracks page appears.
3. In the grid, select the track to add a custom item to and on the action bar, click **Go to track**. The track page appears.
4. On the track calendar view, select the custom item to change and on the action bar, click **Edit**. The Edit custom item screen appears.
5. If needed, you can edit the name of the custom item.
6. In the **Start time** and **End time** fields, you can adjust the day the item occurs and the start and end times.
 - If this is a multi-day track, you can select a different day for the program to occur. For example, to schedule a program for the second day of a multi-day track, you would select "Day 2." A multi-day track is limited to five days.

- To make the event span multiple days, select different days in each field. For example, to schedule a program that spans the first two days of a multi-day track, you would select “Day 1” in the **Start time** field and “Day 2” in the **End time** field.
- 7. To move the item to a different location, edit the **Location** field. To prevent other groups from scheduling a custom item at the same location during the same time period, select **Mark location unavailable to other groups**. If you select this checkbox, the selected location is unavailable for other groups to use during this time.
- 8. In the **Notes** field, enter any additional information related to the custom item like special requirements or other relevant information. The notes entered here are displayed on the track calendar view. When this track is loaded onto an itinerary, notes entered here are also displayed on the itinerary calendar view, as well as on the printed itinerary. The notes can be changed on the itinerary as needed.
- 9. On the Resources tab, add, edit, or delete as many resources as you need for the custom item.
- 10. Click **Save**.

➤ Delete a custom item from a group track

1. From *Sales*, click **Group sales**. The Group Sales page appears.
2. Under **Configuration**, click **Manage tracks**. The Tracks page appears.
3. In the grid, select the track that contains the custom item to remove and on the action bar, click **Go to track**. The track page appears.
4. On the track calendar view, select the custom item to remove and on the action bar, click **Delete**. A confirmation screen appears.
5. Click **Yes**. The custom item is removed from the track.

Schedule Group Itinerary Tracks

With tracks, you create templates that are used to quickly load a specific itinerary for a group visit. Once a group track is added, you schedule daily admission programs, scheduled events, and custom items to define the track schedule.

For example, you can create a “Dinosaur Fossil Hunt” track that provides a curriculum-based experience centered on dinosaurs and the hunt for fossils. A typical itinerary for this track may start off with a custom item for arrival from 8:30 to 9:00. This would be followed by a daily admission program, which is admission to the Dinosaur Hall, from 9:00 to 12:00. This gives the group three hours to explore the dinosaur exhibits. For lunch, another custom item is added to the itinerary from 12:00 to 12:45. After lunch, the group attends two timed program events, a fossil hunt from 1:00 to 1:30 and then the Extreme T-Rex IMAX film from 2:00 to 3:00.

Tip: Custom items are used to schedule things that are not daily admission programs or program events. For example, you can use custom items to schedule meals, gift shop visits, informal tours, meet-ups, or anything else that is needed.

Typically, a group visit involves one day. However, you can schedule a multi-day itinerary track that spans up to five days. To schedule a multi-day track, you add programs and custom events for each day

included in the itinerary. When you add each program or custom item, you select "Day 1," "Day 2," etc. When you save the program, the new day is added to the itinerary and displayed on the calendar view.

Tip: If you have already created an itinerary that would make a good track, you can save the itinerary as a track. Once the itinerary is saved as a track, you can edit it from the Tracks page. For more information, see [Save a Group Itinerary as a Track on page 213](#).

➤ Schedule supplies/equipment resources for a group track

1. From *Sales*, click **Group sales**. The Group Sales page appears.
2. Under **Configuration**, click **Manage tracks**. The Tracks page appears.
3. In the **Tracks** grid, select the track to add resources to and on the action bar, click **Go to track**. The track page appears.
4. Select the Resources tab.
5. In the **Supplies/Equipment resources** grid, click **Schedule resources**. The Schedule supplies/equipment resources for track screen appears.
6. In the **Resource** column, enter the resource or click the magnifying glass to use the Resource Search screen to find and select the resource.
7. If you selected a per ticket resource, the per ticket quantity needed from the resource displays. If you did not select a per ticket resource, in the **Quantity needed** column, enter the number of resources required.
8. Add as many supplies/equipment resources as you need for the group track.
9. Click **Save**.

➤ Schedule staffing resources for a group track

1. From *Sales*, click **Group Sales**. The Group Sales page appears.
2. Under **Configuration**, click **Manage tracks**. The Tracks page appears.
3. In the **Tracks** grid, select the track to add resources to and on the action bar, click **Go to track**. The track page appears.
4. Select the Resources tab.
5. In the **Staffing resources** grid, click **Add**. The Add a staffing resource screen appears.
6. Select a staffing resource and enter the quantity needed for the group track.
7. In the **Filled by** field, select who can perform as the resource such as a volunteer, a staff member, or a board member.
8. Select the job being performed or under **Job Details**, enter the name and description of the job. For example, you need a volunteer to help with large tour group visits. On the track you set up for large tour groups, you select the resource as Gift Shop Staff and the job being performed as a Cashier.

Note: If you select a job being performed, the name and description default from the job type.

9. Add as many staffing resources as you need for the group track.
10. Click **Save**. You return to the Resources tab on the group track.

➤ Edit staffing resources for a group track

1. From *Sales*, click **Group Sales**. The Group Sales page appears.
2. Under **Configuration**, click **Manage tracks**. The Tracks page appears.
3. In the **Tracks** grid, select the track to edit staffing resources and on the action bar, click **Go to track**. The track page appears.
4. On the Resources tab, in the Staffing resources grid, select the staffing resource to change and on the action bar, click **Edit**. The Edit staffing resource screen appears.
5. In the **Quantity needed** field, edit the number of resources you need for the group track.
6. Click **Save**. You return to the Resources tab on the group track.

➤ Delete staffing resources for a group track

On the Resources tab of a group track, you can delete staffing resources you no longer need. In the **Staffing Resources** grid, select the staff resource you no longer need and on the action bar, click **Delete**. A confirmation screen appears. Click **Yes** and you return to the group track. The staffing resource no longer appears. However, if an itinerary was already created from this group track, the resource on those itineraries are not affected. Deleting staff resources here only affects future itineraries based on the group track.

Manage Group Reservations

A group reservation is the central hub for all information regarding a group visit or facility rental. Initially, you add a group reservation record to track the basic information about the visit or rental, including the date and contact person for the group. As the group sales process progresses, you add itineraries, arrival information, and process payments all from the group reservation record.

After a group reservation is added, you can edit or delete the reservation as needed. You can also update the status of the order and adjust the due dates for reservation deposits, security deposits, and the order balance. You can also review order details, mark the contract as sent or received, and edit the final count for the order.

View the Group Reservation Calendar

The group reservation calendar is your starting point for processing group ticket sales and facility rentals. It is the central location for building and managing group visits, including reservations and itineraries. To access the calendar, from *Sales*, click **Group Sales**.

From the calendar, you can quickly open an existing reservation to schedule itineraries, change the order status, adjust arrival details, or add notes about the visit. To open a reservation record you simply double-click a reservation on the calendar. You can also right-click on a reservation and select **Go to reservation**.

Additionally, you can add a new reservation from the calendar when you click **Add**. To add a reservation for a specific day, double-click a day on the calendar or right-click a day and select **Add**.

For more information, see [Add Group Reservations on page 157](#). You can also delete reservations directly from the calendar if no payment has been received. To do so, right-click on a reservation and select **Delete**. If payment has been received, you cannot delete a reservation but you can cancel it. To do, right-click on the reservation and select **Cancel**.

By default, the group reservation calendar displays all in-progress, completed, and canceled group reservations. However, you can filter the calendar to display only past due or canceled reservations, as well as reservations with a specific status. You can also view the number of available tickets based on capacity constraints.

The colors used to display specific items on the calendar are configurable. To change the colors defined for each item that appears on the calendar, click **Customize style**.

Tip: To change the visit date of a reservation displayed on the calendar, you can drag and drop the reservation to a different day. When you move the reservation, the Change visit date screen appears so you can check for conflicts before saving. For more information, see [Change Group Visit Dates on page 180](#).

View Completed Group Reservations

The group reservation calendar provides a filter you can use to view or hide complete group reservations. You may find it useful to hide reservations with a status of complete as it can reduce clutter and allow you to more clearly see the reservations on the calendar that may need your attention. To show or hide completed group reservations on the calendar, access the **Calendars** section and select or clear the **Completed reservations** checkbox.

The group reservation calendar provides a filter you can use to view or hide complete group reservations. You may find it useful to hide reservations with a status of complete as it can reduce clutter and allow you to more clearly see the reservations on the calendar that may need your attention. To show or hide completed group reservations on the calendar, under **Filters**, select or clear the **Completed reservations** checkbox.

View Canceled Group Reservations

The group reservation calendar provides a filter you can use to show or hide canceled group reservations. To show or hide canceled group reservations on the calendar, access the **Calendars** section and select or clear the **Canceled reservations** checkbox.

The group reservation calendar provides a filter you can use to show or hide canceled group reservations. To show or hide canceled group reservations on the calendar, under **Filters**, select or clear the **Canceled reservations** checkbox.

Display In-Progress Group Reservations by Status

The group reservation calendar provides a filter you can use to display only group reservations that have the status you select. For example, to quickly view all group reservations with a status of "Confirmed," you access the **Calendars** section, and click the down arrow next to the **In progress reservations** checkbox. The **Status** filter is displayed.

The group reservation calendar provides a filter you can use to display only group reservations that have the status you select. For example, to quickly view all group reservations with a status of "Confirmed," under **Filters**, click the down arrow next to the **In progress reservations** checkbox. The **Status** filter is displayed.

From the list, select "Confirmed." Make sure the **In progress reservations** checkbox is selected and click **Apply filters**. The calendar now displays only reservations that have the specified status. To display all reservations again, select the blank entry in the list and click **Apply filters**.

View Only Past Due Group Reservations

The group reservation calendar provides a filter you can use to display only group reservations that are past due. For example, to quickly view all group reservations that have yet to pay their reservation deposit by the required due date, access the **Calendars** section and click the down arrow next to the **In progress reservations** checkbox. The **Status** filter is displayed along with the **Show past due only** checkbox.

The group reservation calendar provides a filter you can use to display only group reservations that are past due. For example, to quickly view all group reservations that have yet to pay their reservation deposit by the required due date, under **Filters**, click the down arrow next to the **In progress reservations** checkbox. The **Status** filter is displayed along with the **Show past due only** checkbox.

Next, select the **Show past due only** checkbox and click **Apply filters**. The calendar now displays only those reservations that are past due. To display all reservations again, clear the **Show past due only** checkbox and click **Apply filters**.

Display Capacity Availability

The group reservation calendar provides a filter you can use to display only dates with enough availability for the capacity needed. For example, to quickly view all dates with enough availability for a large school group, access the **Calendars** section and click the down arrow next to the **Capacity available** checkbox. The **At least** filter is displayed.

The group reservation calendar provides a filter you can use to display only dates with enough availability for the capacity needed. For example, to quickly view all dates with enough availability for a large school group, under **Filters**, click the down arrow next to the **Capacity available** checkbox. The **At least** filter is displayed.

Enter the number of visitors you need for your group reservation and click **Apply filters**. The calendar now displays the capacity available only for the days with enough capacity for your large school group. To display all days capacity available again, clear the number of capacity needed and click **Apply filters**.

View the Group Reservation List

In addition to the Reservation Calendar, we also provide a Reservation List you can use to view all reservations currently in the system. With the list view, you can quickly see order balance, status, and other information about a reservation without opening the reservation record. You can use the list view as a starting point for processing group ticket sales or to locate specific reservations that are complete,

in-progress, or canceled. To access the Reservation List, from *Sales*, click **Group Sales** and select the Reservation List tab.

From the list, you can quickly open an existing reservation to schedule itineraries, change the order status, adjust arrival details, or add notes about the visit. To open a reservation record, select a reservation in the list and click **Go to reservation** or simply double-click a reservation.

Additionally, you can add a new reservation by clicking **Add** on the action bar or by right-clicking in the grid and selecting **Add**. For more information, see [Add Group Reservations on page 157](#). You can also delete reservations directly from the list. To do so, select a reservation and click **Delete reservation** on the action bar or right click on a reservation and select **Delete**.

The reservation list also provides filters you can use to view completed, canceled, or past reservations, as well as reservations for a specific date or date range. After you adjust the filters available, click **Apply** to display the results.

Add Group Reservations

You add a group reservation to book a group visit or facility rental. When you add a reservation, you enter the date and time the visit or rental will occur. You also link a patron record to the reservation by either selecting an existing patron record or adding a new one. For group visits, the patron is typically an organization. You also enter a name for the reservation, select an existing contact or add a new contact, and enter any notes regarding the visit or rental. Typically, group reservations are booked by a group sales coordinator.

When you add a reservation, you select whether to use per-ticket or flat rate pricing to calculate the cost of the tickets included in the order. With per ticket pricing, the cost is calculated based on the number of tickets included in the order. The specific cost of each ticket is determined by the price lists associated with the programs. With flat rate pricing, the amount charged for the order is determined by a rate scale. If you select "Flat rate" you also select the rate scale to use. For more information about rate scales, see [Configure Flat Rate Pricing on page 135](#).

Note: The pricing structure you select on a reservation applies only to tickets included in the order. It does not apply to facility rentals. Instead, pricing for a facility rental is based on the price of the location being rented. The location and price are set on a custom item added to the reservation itinerary.

During the reservation process for both group visits and facility rentals, you can determine the amount and due date for the reservation deposit and security deposit, as well as the due dates for receiving the contract, final count, and order balance. If your organization configured reservation defaults, the reservation and security deposit, contract, final count, and order balance due dates are automatically calculated based on the default settings. For more information about configuring default settings for reservations, see, [Configure Reservation Defaults on page 126](#).

After the reservation is saved, the reservation record is displayed. From the reservation record, the salesperson can further define the group visit or facility rental by configuring arrival information, adding or editing the group itinerary, and processing payments.

Note: When you add a group reservation, you have the option of entering the price types and quantities for the tickets included in the order. If you enter the ticket quantity and price types on the reservation and save, an itinerary is automatically created and displayed on the Itineraries tab of the

reservation record. You can then view the itinerary and schedule events and activities for the group to attend during their visit. For more information, see [Schedule Group Itineraries on page 187](#).

> Add a group reservation

1. From *Sales*, click **Group sales**. The Group Sales page appears.
2. Above the calendar on the action bar, click **Add**. The Add a reservation screen appears.

Add a reservation

Reservation Due Dates Pricing Structure

General Visit

Patron:

Date of visit: 1/20/2010

Quick itinerary:

Arrival time:

Departure time:

Number of visitors

Type	Count

Reservation name:

Group type:

Comments:

Capacity needed: 0

Check for group type resource conflicts Ignore group type resource conflicts

Tip: When you add a reservation, if you double-click a day on the calendar or right-click a day and selected **Add**, that date is automatically entered in the **Date of visit** field on the Add a reservation screen. If you click **Add** on the action bar to add the reservation, the current date is displayed.

3. Next, you must add a new constituent record or select an existing record to associate with the reservation.
 - If the customer has an existing constituent record, in the **Patron** field, click the magnifying glass to search for the record. For more information, see [Patron Search on page 17](#). If no record currently exists for the customer, you can add one from the Patron Search screen.

Note: Because the patron associated with a group reservation or facility rental is typically an organization or individual, the search screen is configured by default to search only for organizations and individuals. To also include groups/households in the search, select the appropriate checkbox on the search screen.

- If the customer does not have an existing constituent record, you can add one by clicking **Add new individual** or **Add new organization**. After you save the new constituent, you return to the Add a reservation screen.
4. The contact information displayed on the Add a reservation screen depends on the type of constituent record you associated with the reservation.
 - If you selected an individual for the reservation, the primary address, phone number, and email for the constituent are displayed.
 - If you selected a group or household, the contact information of the constituent who is the primary member of the group or household is displayed.
 - If you select an organization constituent, the **Contact** field is displayed. This field includes all individuals that have a contact relationship with the organization. Select the individual to use as the contact for this reservation. If needed, you can add a new contact relationship for the organization to associate with this reservation. For more information, see [Add a Contact Relationship on page 163](#). Once a contact is selected or added, the contact relationship address, phone number, and email are displayed.

Note: If the reservation is associated with an organization constituent and the contact originally saved on the reservation is deleted from the system or becomes invalid, the system will continue to show that contact on the reservation. To change the contact associated with the reservation, you must edit it. For more information see [Edit Contact Information for Group Reservations on page 183](#).

5. For efficiency, the patron name is automatically displayed in the **Reservation name** field. If you selected an organization constituent as the patron, the last name of the group contact is also displayed. You can leave the default or edit the reservation name as needed. For example, you can enter a more specific reservation name like "Third Grade Field Trip" or "Hernandez Wedding Reception."
6. If applicable, select a group type for the reservation. When you select a group type, any requirements for the group, such as resources, are automatically added to the reservation.
7. In the **Comments** field, you can enter additional information or notes about the group visit or facility rental.
8. In the **Date of visit** field, select the date the group will arrive. When you added the reservation, if you double-clicked a day on the calendar or right-clicked a day and selected **Add**, that date is displayed in this field. If you clicked **Add** on the action bar to add the reservation, the current date is displayed. If the group visit or rental will span multiple days, you enter only the first day here. When you create the group itinerary, you can plan each day of a multiple day visit or rental by adding scheduled events, admission programs, and custom items for the respective days.
9. The **Quick itinerary** field provides an alternative to scheduling the itinerary after the reservation is added and is helpful if you commonly process group reservations with a single scheduled event or admission program. This is especially useful for group visits that involve only a daily admission program. To create a "quick itinerary," select a single event or program item in this field. This is an optional step.
10. The **Arrival time** and **Departure time** fields allow you to enter the specific times the group plans to arrive and depart from your organization. If you selected an item in the **Quick itinerary** field, you must enter times in these fields. Otherwise, you can leave the fields blank and enter the times later on the reservation record.

- If you selected a daily admission item in the **Quick itinerary** field and configured default arrival and departure times for quick itineraries, the default times are displayed. Make changes as needed. If defaults are not configured, manually enter the correct times. For more information about default arrival and departure times when a daily admission item is selected in the **Quick itinerary** field, see [Configure Quick Itinerary Defaults on page 132](#).
- If you selected a scheduled event in the **Quick itinerary** field, the start and end times of the event are displayed in the **Arrival time** and **Departure time** fields. Make changes as needed.

Note: If you enter times in both the **Arrival time** and **Departure time** fields but do not select an item in the **Quick itinerary** field, when you save the reservation, an itinerary is created with a custom item that spans the times you entered. You can think of this as a generic “visit” itinerary item. The name of the custom item will be same as the reservation name and no location will be assigned. You can edit the custom item on the itinerary as needed.

11. Under **Number of visitors**, in the grid, select the price types and quantity of each to include in the group visit. These are the visitors who will attend. For example, you may have 10 adults and 40 students. If this is a facility rental reservation, select the price type you configured for rental purposes. The only price types available in the grid are those that are specifically allowed for the “Group Sales” sales method. If you do not select price types and quantities here, you will need to later when you add itineraries.

Note: If you select an item in the **Quick itinerary** field, you must enter at least one visitor in the **Number of visitors** grid. If needed, you can adjust the number of visitors later on the reservation record.

12. The capacity needed for the group is displayed under the grid and is based on the quantity of price types you entered. The capacity available is how many visitors you can add based on the total number of visitors for all group reservations on that day. If you have configured a maximum capacity per day on the Group Sales Settings page but want to override that capacity and allow for additional visitors, select **Exceed capacity available** to override the constraints.
13. If you selected a group type for this reservation, and you also entered a visit date, arrival time, and departure time for the group, the **Check for resource group type conflicts** button becomes active. Click this button to see if resource conflicts exist for the day and times entered. If conflicts exist, they are displayed and you can use this information to change the reservation details. Or you can mark **Ignore group type resource conflicts** and proceed.
14. Select the Due Dates tab to review and configure the reservation deposit amount and due dates for receiving the reservation deposit, security deposit, contract, final count, and order balance. If your organization configured reservation defaults for group orders, the deposit amount and due dates are calculated based on those rules. The settings on this tab are applicable to both group visit reservations, as well as facility rental reservations. For more information about configuring default settings for reservations, see, [Configure Reservation Defaults on page 126](#).

Add a reservation

Reservation **Due Dates** Pricing Structure

Reservation deposit

Reservation deposit required

Reservation deposit due: 5/10/2010

Reservation deposit amount: \$50.00

Security deposit

Security deposit required

Security deposit due: 5/10/2010

Security deposit amount: \$5.00

Contract

Contract required

Contract due: 5/10/2010

Final count

Final count required

Final count due: 5/10/2010

Order balance

Order balance due: 5/10/2010

Check for group type resource conflicts Ignore group type resource conflicts

Save Cancel

15. To not require a deposit for this reservation, clear the **Reservation deposit required** checkbox. If a reservation deposit is required, you can edit the due date and amount.
16. If the default deposit is configured as a flat amount, you can manually enter a new amount in the **Reservation deposit amount** field. However, if the default is configured as a percentage, you cannot change it here. Instead, you change the percentage on the reservation after it is saved. For more information, see [Edit Group Reservations on page 175](#).
17. To not require a security deposit for this reservation, clear the **Security deposit required** checkbox. If a security deposit is required, you can edit the due date and amount.
18. If there is no default date configured, select the date by which the security deposit is due.
19. If the default security deposit is configured as a flat amount, you can manually enter a new amount in the **Security deposit amount** field. However, if the default is configured as a percentage, you cannot change it here. Instead, you change the percentage on the reservation after it is saved. For more information, see [Edit Group Reservations on page 175](#).
20. To not require a contract for this reservation, clear the **Contract required** checkbox. If a contract is required for this reservation, you can change the due date as needed. For more information about configuring default contract requirements for group orders, see [Configure Contract Defaults on page 129](#).
21. To not require a final count for this reservation, clear the **Final count required** checkbox. If a final count is required, you can change the due date as needed. For more information about

configuring default final count requirements for group orders, see [Configure Final Count Defaults on page 130](#).

22. Under **Order balance**, you can change the date that full payment must be received for the group order. Typically, full payment is due on the day of the group visit. For more information about configuring default final count requirements for group orders, see [Configure Order Balance Payment Defaults on page 131](#).

Tip: In many cases, the final payment for a group visit or facility rental is due at the time of the visit or rental. If this is the case with your organization, the date that appears in the **Order balance due** field should be the same as the group's visit date or rental date.

23. If there are tickets included in the order, select the Pricing Structure tab.

The screenshot shows a software window titled "Add a reservation" with three tabs: "Reservation", "Due Dates", and "Pricing Structure". The "Pricing Structure" tab is active. Under the "Pricing" section, there are two dropdown menus: "Pricing structure:" set to "Flat rate" and "Flat rate scale:" set to "Rate Scale 1". Below these is the text "Charge for current group: \$100.00". At the bottom of the dialog, there is a warning icon and the text "Check for group type resource conflicts" next to an unchecked checkbox labeled "Ignore group type resource conflicts". At the very bottom right, there are "Save" and "Cancel" buttons.

24. In the **Pricing structure** field, select whether to use per ticket or flat rate pricing to calculate the cost of the tickets included in the order. If this is a facility rental reservation that will not include tickets, the pricing structure selected on this tab does not apply and you can skip this step. Instead, pricing is charged according to the amount associated with the location booked.
 - With per ticket pricing, the cost of a group visit is calculated based on the number of tickets included in the order. The specific cost of each ticket is determined by the price lists associated with the programs.

- With flat rate pricing, the amount charged for tickets in the order is determined by a rate scale. If you select "Flat rate" also select the rate scale to use. For more information about rate scales, see [Configure Flat Rate Pricing on page 135](#).

Note: If you selected a quick itinerary on the Reservation tab that uses flat rate pricing, the appropriate rate scale will automatically appear in the **Flat rate scale** field.

25. Click **Save**. The reservation record is displayed. From the reservation record, you can further define the group visit or facility rental by configuring arrival information, adding or editing the group itinerary, and processing payments.

Add a Contact Relationship

During the group sales process, you may need to add a contact relationship for an organization constituent. For example, when you add a group reservation for an organization constituent, you select a contact for the organization. The contact you designate is an individual constituent in the system and will be the point person to contact at the organization regarding the group reservation.

If the appropriate contact relationship does not currently exist, you can add a new one. When you add an individual relationship for an organization, the relationship appears on the Relationship tabs of both the organization constituent and the related individual.

Note: For more information about individual and organization constituents, as well as relationships, see the *Constituent Guide*.

> Add a contact relationship

1. On the Add a reservation screen, in the **Contact** field, click the new button. The Add contact relationship screen appears.

Add a contact relationship

<p><u>Individual</u></p> <p>Last name: <input type="text" value="Bach"/> </p> <p>First name: <input type="text" value="Julie"/></p> <hr/> <p><u>Relationship</u></p> <p>AAA Concrete is the:</p> <p><input type="text" value="Employee"/> ▼</p> <p>Julie M. Bach is the:</p> <p><input type="text" value="Employer"/> ▼</p>	<p><u>Contact</u></p> <p>Contact type: <input type="text" value="Event"/> ▼</p> <p>Contact address: 48 Island Lakes Shore Pahoa, HI 78741</p> <p><input type="button" value="Edit"/> <input type="button" value="Remove"/></p> <p>Contact phone: (808) 779-1466</p> <p><input type="button" value="Edit"/> <input type="button" value="Remove"/></p> <p>Contact email address: [No contact email]</p> <p><input type="button" value="Add"/></p>
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Note: The **Contact** field appears on the Add Reservation screen only if you selected an organization constituent in the **Patron** field.

2. In the **Last name** field, click the magnifying glass and use the Individual Search screen to find and select the individual to add as a relationship.

Note: If the search results do not return the individual to add as a relationship, you can add the individual to your database from the Add a contact relationship screen. To do so, enter the individual's name in the **Last name** and **First name** fields. When you save the relationship, the program automatically creates a new constituent record for the individual. Be sure your search first to avoid adding a duplicate individual.

3. Under **Relationship**, select the association each constituent has with the other. For example, the organization constituent may be the "Employer" and the individual may be the "Employee."
4. Under **Contact**, select the contact type. For example, you may have a "Group reservation" or "Event" contact type.
5. By default, the **Contact address**, **Contact phone**, and **Contact email address** fields display the primary information of the organization. To use a different address, phone or email for the related individual as an organization contact, click **Edit** for the respective field and enter the contact information. To remove a contact address, phone, or email, click **Remove** for the respective field. If no contact information is specified for the organization or you remove existing information, click **Add** for the respective field to add an address, phone, or email for the contact relationship.

The address, phone, or email you enter here is saved to the individual's constituent record and appears on the Contacts tab. If this individual contact is deleted from the system or becomes invalid, the contact name, address, phone, and email are retained on the reservation.

6. Click **Save**.

Search for Reservations

To help you quickly locate specific reservations that have been added to the system, use the Reservation Search screen. On this screen, you can search by reservation name, patron, contact name, order number, order status, or program name. You can also search reservations by a specific date or date range.

When you search for reservations by reservation, patron, or contact name, the way you enter the name affects the search results. For example, if you enter a full name in the **Patron name** field, the search results include patrons with this first and last name. If you enter a single name, the program searches for only last names that match.

To search for a specific reservation, you can enter the order number. You can also search by the reservation name or the program name. If you want to include reservations placed during a certain period of time, you can limit the search results to a specific date or date range. After you run the search, select an entry in the Results grid and click **Select** on the action bar to view the reservation record.

Tip: If multiple orders meet your search criteria, you can use the **Arrival date** and **Order balance** columns in the **Results** grid to locate the correct reservation.

➤ Search for a group reservation

1. From *Sales*, click **Group Sales**. The Group Sales page appears.
2. Under **Tasks**, click **Search reservations**. The Reservation Search screen appears.
3. Enter criteria to help you locate the reservation. For example, you can enter the reservation name, the patron's name, or the group contact's name. When you enter name information on which to base your search, you can enter a partial name or individual letters. For example, if you enter "Sm", all names beginning with the letters "Sm" appear. Also, the search process is not case-sensitive, so you can enter Smith, smith, and SMITH and get the same results.

Note: When you search for reservations associated with a patron, the way you enter the name affects the search results. If you enter a full name in the **Patron name** field, the search results include patrons with this first and last name. If you enter a single name, the program searches for only last names that match.

4. When searching by name, you can select the respective checkboxes to include aliases or nicknames. For example, if Robert Hernandez goes by the nickname "Bob," if you enter "Bob Hernandez" in the **Patron name** field, you should also select Include nicknames for Robert Hernandez's reservations to appear in the search results.
5. To search for a specific reservation, you can enter the order number. You can also search by order status or program name. If you want to search for reservations that occur during a certain period of time, you can limit the search results to a specific date or date range.

Note: In the criteria fields, you can enter "wildcard" characters to take the place of parts of the search phrase. Use the asterisk (*) or percent sign (%) to take the place of a group of characters and the question mark (?) or underscore (_) to take the place of an individual character. For example, to locate all refunds for patrons with a last name ending with the letters "son", you can enter *son or %son in the name field, or for the last name Smith or Smyth, you can enter Sm?th or Sm_th.

6. After you enter criteria to help locate the order, click **Search**. The **Results** grid displays reservations that meet the criteria you entered. If multiple reservations meet your search criteria, you can use the **Arrival date** and **Order balance** columns in the **Results** grid to locate the correct reservation.
7. Select the reservation to view and click **Select**. The reservation record appears. For more information, see [Manage Group Reservations on page 154](#).

Manage Group Order Contracts

If you require a contract for group reservations, you create the contract from the Due Dates tab on a reservation record. After a contract is created, you can print it or attach a copy to an email and send it to the group contact person.

Note: Only contracts in *.docx file format are compatible.

When you send the contract, you mark it as sent in system. This enables you to keep a record of exactly when you send contracts to patrons, which is helpful if you need to follow-up. When a contract is marked as sent, the status of the group order automatically changes to "Tentative."

After the group contact person returns the contract to your organization, you can mark it as received. This will change the order status to "Confirmed." If you also require a deposit and it was not received before or along with the contract, the order status will stay "Tentative" until you receive both the contract and the deposit.

In some cases, the group may request changes to their planned visit that require a new contact. In this case, you can replace the current contract with a new one. Additionally, you can view, edit, print and email contracts created for a group order.

Create Contracts

When you create a contract for a group visit reservation or facility rental, you select a preconfigured template. The template you select is then used to create a personalized contract for the order.

Note: Template files must be in *.docx file format.

After you create a contract, it is saved as an attachment on the Documentation page. A link to the contract is also displayed in the **Due dates** grid, under **Contracts**.

Note: If the itineraries for an order change after a contract has been created, you should replace the current contract with a new one so it reflects the changes. You can then send the replacement contract to the group contact person. For more information, see [Replace Contracts on page 168](#).

> Create a contract

1. From *Sales*, click **Group sales**. The Group Sales page appears.
2. On the calendar, select a reservation and on the action bar, click **Go to reservation**. The reservation record appears.
3. In the **Due Dates** grid, click **Contract**, and select **Create contract**. The Create contract screen appears.

Note: If **Contracts** does not appear in the **Due Dates** grid, it means a contract is not required by default for the order. To require a contract, under **Tasks**, click **Edit Reservation** and select **Contract required**. Also enter a due date. When you save and return to the Due Dates tab, the Contract section is displayed. For more information see [Edit Group Reservations on page 175](#).

4. By default, the **Name** field automatically displays the name of the patron associated with the group reservation. You can change the default name as needed.
5. If a default template has been configured to use for group order contracts, it is displayed in the **Contract template** field. If no default has been configured, the field is blank. Click the search button to select a template to use for the contract. The Letter Template Search screen appears.
6. In the **Letter type** field, make sure "Group sales contract" is selected and click **Search**. In the results grid, highlight the template to use and click **Select**. You return to the Create contract screen.
7. If a default attachment type has been configured for group order contracts, it is displayed in the **Attachment type** field. If no default has been configured, the field is blank. Select the

attachment type your organization uses for group contracts. After the contract is created, it will be saved as an attachment on the Documentation tab of the reservation record.

Tip: Typically, your system administrator configures the attachment types available. If a “contract” attachment type has not yet been added to the system and you have the necessary security rights, you can add a new type by entering it in the **Attachment type** field.

8. By default, **Mark contract as sent** is selected. If you intend to send the contract right away, you can leave it selected. Otherwise, you should clear the checkbox. If you leave it selected, when you save the contract, the Order History tab will have a “Contract sent” entry with today’s date.

Note: You can mark the contract as sent or unsent at a later date. For more information, see [Mark Contracts as Sent or Not Sent on page 170](#).

9. Click **Save**. You return to the reservation record and a link to the contract is displayed. The contract you created is now saved in your database and has also been added as an attachment on the Documentation page of the reservation.

Note: To access the Documentation page, click **Go to documentation** in the **Important notes** grid.

View Contracts

After a contract is created for a group visit reservation or facility rental, it is saved in your database and accessible for viewing on the Due Dates tab of the reservation record. When you view a contract, you can print a copy or save a local copy to send as an email attachment.

Tip: You can also view contracts created for group orders on the Documentation tab of each reservation record. Once a contract is created, it is saved in your database and is added as an attachment on the Documentation tab of the reservation record.

> View a contract

1. From *Sales*, click **Group sales**. The Group Sales page appears.
2. On the calendar, select a reservation and on the action bar, click **Go to reservation**. The reservation record appears.
3. Select the Due Dates tab.
4. If you previously created a contract for this reservation, a link to the document is displayed in the **Contract** section.
5. Click the link. If you have *Word* installed, a view-only version of the contract opens. If needed, you can now print a copy of the contract or save a local copy to send as an email attachment.

Edit Contracts

You can view and edit a contract attached to a reservation. This enables you to change or further personalize the text included in the contract if needed.

If multiple changes have been made to a group's itinerary, it is more efficient to replace a contract than to manually incorporate changes in cost incurred through additions or subtractions to the itinerary. This information is automatically calculated and pulled into the contract when a replacement is created. For more information, see [Replace Contracts on page 168](#).

> Edit a contract

1. From *Sales*, click **Group sales**. The Group Sales page appears.
2. On the calendar, select a reservation and on the action bar, click **Go to reservation**. The reservation record appears.
3. Select the Documentation tab.
4. In the grid, under **Attachments**, select the contract to edit.
5. On the action bar, click **Edit**. The Edit attachment screen appears.
6. From the Edit attachment screen, click **Open file**. If you have *Word* installed, the contract opens and you can edit it as needed.
7. After you make the necessary changes, save and close the document. The updated contract is saved and stored in your database.

Replace Contracts

If the itineraries for an order change after a contract has been created, you should replace the current contract with a new one so it reflects the changes. You can then send the replacement contract to the group order contact.

Note: When you replace a contract, the old contract is no longer displayed on the Due Dates tab. However, old contracts are not removed from your database when replaced. Instead, they continue to be stored as attachments on the Documentation tab. To delete old contracts entirely, you must access the Documentation tab and delete each attachment.

> Replace a contract

1. From *Sales*, click **Group sales**. The Group Sales page appears.
2. On the calendar, select a reservation and on the action bar, click **Go to reservation**. The reservation record appears.
3. Select the Due Dates tab.
4. In the **Contract** section, click **Replace contract**. The Replace Contract screen appears.
5. By default, the **Name** field automatically displays the name of the patron associated with the group reservation. You can change the default name as needed.
6. If a default attachment type has been configured for group order contracts, it is displayed in the **Attachment type** field. If no default has been configured, the field is blank. Select the attachment type your organization uses for group contracts. After the contract is created, it will be saved as an attachment on the Documentation tab of the reservation record.

7. In the **File** field, click **Choose file** to select a file to replace the contract, or click **Clear file** to clear the current file.

Note: To edit the existing contract, on the Due Dates tab, under **Contract**, click the contract. A download screen appears. Download and open the file and then make the necessary changes. After you save the file, you can choose it from the Replace Contract screen.

8. By default, **Mark contract as sent** is selected. If you intend to send the contract right away, you can leave it selected. Otherwise, you should clear the checkbox. If you leave it selected, when you save the contract, the Order History tab will have a "Contract sent" entry with today's date.

Note: You can mark the contract as sent or unsent at a later date. For more information, see [Mark Contracts as Sent or Not Sent on page 170](#).

Print Contracts

As part of your organizations's contract process, you may need to print a contract for a group to review and sign. You can print a contract form the Due Dates tab of a group reservation.

Tip: You can also send a contract to a group as an email attachment. For more information, see [Send Contracts as Email Attachments on page 169](#).

➤ Print a contract

1. From *Sales*, click **Group sales**. The Group Sales page appears.
2. On the calendar, select a reservation and on the action bar, click **Go to reservation**. The reservation record appears.
3. If you previously created a contract for this reservation, a link to the document is displayed in the **Contract** section of the **Due dates** grid. Click the link. If you have *Word* installed, a view-only version of the contract opens.
4. Print the contract. To do this within *Word*, you must select the **Print** option. After you print a copy of the contract, close the view-only document. You can now send the contract to the group for review.

Send Contracts as Email Attachments

The contract attachments you create for group orders are stored in your database. To send a contract to a group as an email attachment, you must first save a local copy of the contact. This creates a copy of the contract that exists outside of your database. You can then attach the contract document to an email message using *Outlook*, *Gmail* or any other email application and send it to the group for review.

➤ Email a contract

1. From *Sales*, click **Group sales**. The Group Sales page appears.

2. On the calendar, select a reservation and on the action bar, click **Go to reservation**. The reservation record appears.
3. If you previously created a contract for this reservation, a link to the document is displayed in the **Contract** section of the **Dues dates** grid. Click the link. If you have *Word* installed, a view-only version of the contract opens.
4. Save a local copy of the contract. To do this within *Word*, you must select the **Save As** option and designate a location on your computer or network where the copy will be saved.
5. After you save a local copy of the contract, you attach it to an email message using *Outlook*, *Gmail* or any other email application. You can then send the email to the group for review.

Mark Contracts as Sent or Not Sent

As part of the contract process, you can mark a contract as sent when you send it to the group for review. This enables you to keep a record of exactly when you sent a contract to the patron, which is helpful if you need to follow-up. If needed, you can change the status of the contract from "Contract Sent" to "Contract Marked Not Sent". When you mark a contract as sent or not sent, the Order History page records the action along with respective date.

> Mark a contract as sent

1. From *Sales*, click **Group sales**. The Group Sales page appears.
2. On the calendar, select a reservation and on the action bar, click **Go to reservation**. The reservation record appears.
3. In the **Due dates** grid, the **Contract** section displays a link to the contract that has been created for the order. A due date for the contract is also displayed. To mark the contract as sent, click **Mark as sent**. A confirmation screen appears.
4. Click **Yes**. The **Contract** section now displays a "Sent" date and the **Mark as sent** option changes to **Mark as not sent**.

Note: When you mark a contact as sent, a "Contract Sent" entry is added to the Order History page of the reservation along with the date.

> Mark a contract as not sent

1. From *Sales*, click **Group sales**. The Group Sales page appears.
2. On the calendar, select a reservation and on the action bar, click **Go to reservation**. The reservation record appears.
3. In the **Due dates** grid, the **Contract** section displays a link to the contract that has been created for the order. A due date for the contract is also displayed. Because this contract was previously marked as sent, a "Sent" date is also displayed. To mark the contract as not sent, click **Mark as not sent**. A confirmation screen appears.
4. Click **Yes**. The "Sent" date is removed from the **Contract** section and the **Mark as not sent** option changes to **Mark as sent**.

Note: When you mark a contact as not sent, a “Contract Marked Not Sent” entry is added to the Order History page of the reservation along with the date.

Mark Contracts as Received or Not Received

As part of the contract process, you can mark a contract as received after the group returns it. Usually, a signed contract is required. This enables you to keep a record of exactly when you received the contract from the patron, which is helpful if you need to follow-up. If needed, you can change the status of the contract from “Contract Received” to “Contract Marked Not Received”. When you mark a contract as received or not received, the Order History page records the action along with respective date.

Note: A contract must be marked as sent before you can mark it as received. For more information, see [Mark Contracts as Sent or Not Sent on page 170](#).

> Mark a contract as received

1. From *Sales*, click **Group sales**. The Group Sales page appears.
2. On the calendar, select a reservation and on the action bar, click **Go to reservation**. The reservation record appears.
3. In the **Due dates** grid, the **Contract** section displays a link to the contract that has been created for the order. Both a due date and a sent date are displayed. To mark the contract as received, click **Mark as received**. A confirmation screen appears.
4. Click **Yes**. The **Contract** section now displays a “Received” date and the “Due date” has been removed. The **Mark as received** option changes to **Mark as not received**.

Note: When you mark a contact as received, a “Contract Received” entry is added to the Order History page of the reservation along with the date.

> Mark a contract as not received

1. From *Sales*, click **Group sales**. The Group Sales page appears.
2. On the calendar, select a reservation and on the action bar, click **Go to reservation**. The reservation record appears.
3. In the **Due dates** grid, the **Contract** section displays a link to the contract that has been created for the order. The “Sent” date for the contract is displayed. Because this contract was previously marked as received, a “Received” date is also displayed. To mark the contract as not received, click **Mark as not received**. A confirmation screen appears.
4. Click **Yes**. The “Received” date is removed from the **Contract** section and the **Mark as not received** option changes to **Mark as received**.

Note: When you mark a contact as not received, a “Contract Marked Not Received” entry is added to the Order History page of the reservation along with the date.

Confirm Final Count for a Group Order

When a group visit or facility rental reservation is booked, the number of planned attendees is usually provided by the patron and recorded on the reservation. In many cases, the number of attendees will change prior to the actual visit, which can affect the cost and available capacity. To help avoid capacity issues and to make sure the group is aware of the actual cost of their visit, many organizations require that the “final count” of attendees be provided by a deadline.

On the Group Sales Settings page, you can configure the final count to be required by default for group reservations. If required, you configure rules to calculate the due date based on the order creation date or the date the group visit occurs. For more information, see [Configure Final Count Defaults on page 130](#).

Note: If your organization requires a final count, the due date for receiving the final count is displayed on the summary panel of the reservation record and on the Due Dates tab.

When you mark the final count as received, it means you have received the final number of attendees for the group visit or rental. When you mark the final count as received, the status of the order changes to “Finalized.” Typically, after you receive the final count, you also update the group’s itinerary to adjust the quantity of tickets needed. For more information, see [Edit Group Itineraries on page 214](#).

Note: The final count of attendees affects the cost of a facility rental only if tickets and/or per ticket resources with a cost are included in the rental order. Typically, a facility rental involves only a single cost for the location being rented. This cost is usually a flat amount entered on the itinerary using a custom item and is not calculated based on number of attendees or price types.

➤ Mark final count received

1. From *Sales*, click **Group sales**. The Group Sales page appears.
2. On the calendar, select a reservation and on the action bar, click **Go to reservation**. The reservation record appears.
3. Click **Final count**, in the **Due Dates** grid.
4. Click **Mark as received**. A confirmation screen appears.

Note: When you mark the final count as received, it means you have received the final number of attendees for the group visit or rental. When you mark the final count as received, the status of the order changes to “Finalized.” Typically, after you receive the final count you also update the group’s itinerary to adjust the quantity of tickets needed.

5. Click **Yes**. You return to the reservation record. Under **Final count**, the date is recorded and a green checkmark provides a visual indicator to confirm that the final count has been received. Additionally, the **Mark as received** option changes to **Mark as not received**.

Note: When you mark the final count as received, a “Final Count Received” entry is added to the Order History tab of the reservation along with the date.

➤ Mark final count not received

After you mark the final count as received for a group, there may be circumstances that require you to change the confirmation to “not received.”

1. From *Sales*, click **Group sales**. The Group Sales page appears.
2. On the calendar, select a reservation and on the action bar, click **Go to reservation**. The reservation record appears.
3. Click **Final count**, in the **Due Dates** grid.
4. Click **Mark as not received**. A confirmation screen appears.
5. Click **Yes**. You return to the reservation record and the final count is now confirmed as not received. Under **Final count**, the due date for the final count is displayed. Additionally, the **Mark as not received** option changes to **Mark as received**.

Note: When you mark a contact as not received, a “Contract Marked Not Received” entry is added to the Order History tab of the reservation along with the date.

➤ Edit final count due date

1. From *Sales*, click **Group sales**. The Group Sales page appears.
2. On the calendar, select a reservation and on the action bar, click **Go to reservation**. The reservation record appears.
3. In the **Due Dates** grid, click **Edit** on the action bar. The Edit due dates screen appears.
4. To not require a final count for this reservation, clear the **Final count required** checkbox under **Final count**. If a final count is required, you can change the due date as needed.
5. Click **Save**.

Notify Group of Balance Due

After the final count is confirmed, you can notify the group of the balance due by sending a copy of the group sales order balance notification. This notification can be printed or emailed anytime before or after the balance due date, but it is recommended that you send it a month in advance to avoid late payments.

The group order sales balance provides an order summary that includes the name of the patron associated with the order and the group contact. It also provides the total number of visitors, the visit date, the order balance, any discounts applied, and the number of days past due if applicable. The notification also includes a “Charges” section that lists the scheduled events, admission programs, resources, and rental facilities included in the order. Additionally, any previous payments made toward the reservation are listed. All information on the notice is based on the date the notification is printed or emailed.

If you print and send a physical copy of the order balance notice, you should click **Mark as sent**. This will help you keep track of the balance notices you send to a group contact. When you mark the order balance as sent, an “Order Balance Sent” entry is added to the Order History page.

If you email the notice, the order balance is automatically marked as sent and an "Order Balance Sent" entry is added to the Order History page. An "Order Balance (email)" entry is also added to the Sales Documents page.

If you need to send another balance notice, first mark the order balance as not sent. Then, repeat the steps above to either print or email a new copy of the notification. Entries are added to the Order History page to track the changes.

Note: Before you can email the order balance notification, you must configure the order balance email template. From the Group Sales Setup page in *Tickets*, select **Order balance email template**. Complete the required fields such as a **Subject**, **From address**, and **From name**, as well as the optional introduction and closing.

> View and send a group sales order balance

1. From *Sales*, click **Group sales**. The Group Sales page appears.
2. On the calendar, select a reservation and on the action bar, click **Go to reservation**. The reservation record appears.
3. In the **Reports** section under **Tasks**, click **Order Balance**. The group sales order balance notice appears.
4. Click **View report** to see the order balance information.
5. You can save the order balance to print a physical copy and send it to the group contact person. To email the notification instead, click **Email order balance** under **Tasks**.

Note: Before you can email the order balance notification, you must configure the order balance email template. From the Group Sales Setup page in *Tickets*, select **Order balance email template**. Complete the required fields such as a **Subject**, **From address**, and **From name**, as well as the optional introduction and closing.

> Mark order balance as sent

After you print and send the order balance notice, you should mark it as sent. This helps you keep track of the balance notices you send to a group. **Note:** When you email the order balance notice, it is automatically marked as sent.

1. From *Sales*, click **Group sales**. The Group Sales page appears.
2. On the calendar, select a reservation and on the action bar, click **Go to reservation**. The reservation record appears.
3. In the **Due dates** grid, click **Order balance**.
4. Click **Mark as sent**. A confirmation message appears.
5. Click **Yes**. You return to the reservation record, and the order balance is now confirmed as sent. Under **Order balance**, the due date, total order amount, balance due amount, and the sent date are displayed. Additionally, the **Mark as sent** option changes to **Mark as not sent**.

Note: When you mark the order balance as sent, an "Order Balance Sent" entry is added to the Order History page.

➤ Mark order balance as not sent

1. From *Sales*, click **Group sales**. The Group Sales page appears.
2. On the calendar, select a reservation and on the action bar, click **Go to reservation**. The reservation record appears.
3. In the **Due dates** grid, click **Order balance**.
4. Click **Mark as not sent**. A confirmation message appears.
5. Click **Yes**. You return to the reservation record, and the order balance is now confirmed as not sent. Under Order balance, the due date, total order amount, and balance due amount are displayed. The previous sent date is removed. Additionally, the **Mark as not sent** option changes to **Mark as sent**.

Note: When you mark the order balance as not sent, an "Order Balance Not Sent" entry is added to the Order History page.

Edit Group Reservations

After a group reservation is added, you can edit the reservation name, as well as any comments saved on the reservation record. You can also change the pricing structure to use per-ticket or flat rate pricing to calculate the cost of tickets included in the order. Additionally, you can edit the deposit amount and due date for receiving the deposit amount. If needed, you can also change the due dates for receiving the contract, final count, and order balance.

Note: You can also edit the itineraries on reservations to adjust the group visit or facility rental plans. For more information, see [Edit Group Itineraries on page 214](#).

Note: Under **Pricing** and **Other adjustments**, you can also remove taxes for tax exempt orders. For more information, see [Mark an Order Tax Exempt on page 55](#).

Edit Reservation Name

After you make a group sales reservation, you can change the name of the reservation if necessary. By default, the reservation name is the last name of the person who made the reservation.

To edit the reservation name, open the reservation record for which to edit. Under **Tasks**, click **Edit reservation name**. The Edit reservation name screen appears. After you edit the name, click **Save**. You return to the reservation record. The new name appears on the record, as well as on the reservation calendar.

Edit Group Reservation Times

To edit the time of a reservation, you must edit the reservation's itinerary items.

➤ Edit group reservation times

1. From *Sales*, click **Group Sales** and select the group reservation to change. The Group Sales reservation page appears.
2. In the **Itineraries** grid, click the name of the itinerary. The Group Itinerary page appears. The name defaults to the name of the group reservation contact.
3. Select an item in the itinerary to change, and click **Edit**. Make the necessary changes and click **Save**.
4. Continue to change the times of all itinerary items until the start and end times of the completed itinerary match the desired times of the reservation.
5. The new start time of the first itinerary item will be the reservation's new arrival time, and the end time of the last itinerary item will be the reservation's new departure time.

Change Group Reservation Status

The status of a reservation helps your organization manage group orders. It provides a clear indicator of where the order is during each step of the reservation process. Typically, a reservation progresses through each status in a specific order. For example, when an order is added, it automatically has a status of "Pending." When a contract is sent to the group, the status becomes "Tentative." When the contract is returned and the deposit received, the status becomes "Confirmed." After the group provides the final count of those attending, the status moves to "Finalized."

If you configure and use the reservation defaults to require and calculate due dates for the deposit, contract, final count, and order balance, the applicable status is set automatically as the order progresses. For example, when you mark the contract as sent in the **Due dates** grid of a reservation record, the status of the order automatically becomes "Tentative." The status is clearly displayed at the top of the reservation.

Although the status of an order can be automatically set, you can also manually override the status. For example, you may not require a contract or a deposit for a specific reservation, in this case you can access the reservation record and manually change the status to "Confirmed."

Note: If you cancel a reservation, the status automatically changes to "Canceled." However, you cannot manually change the status of a reservation to "Canceled." For more information, see [Cancel Group Reservations on page 185](#).

➤ Manually change group reservation status

1. From *Sales*, click **Group sales**. The Group Sales page appears.
2. On the calendar, select a reservation and on the action bar, click **Go to reservation**. The reservation record appears.
3. Under **Tasks**, click **Change status**. The Change status screen appears and displays the current status of the order. The following table provides information about each order status.

Order status	Description
Pending	When an order is added, it automatically has a status of "Pending."
Tentative	After a contract is sent to the group, the order status becomes "Tentative."
Confirmed	When the contract is returned and the deposit received, the status becomes "Confirmed."
Finalized	After the group provides the final count of those attending, the status moves to "Finalized."

4. Select a new status for the order. You can also enter comments to explain the manual status change.
5. Click **Save**. The new status is displayed at the top of the reservation.

Copy Group Reservations

When you book a group reservation, you can copy a previous reservation to save time. Copying a reservation is helpful if a group contacts your organization and wants to do the same things they did on a previous visit or book a facility for the same period of time.

To copy a reservation, you first access the reservation you want to copy. To locate a reservation, you can access the Group Sales page and click **Search reservations** or you can view the sales orders for a specific constituent and select the reservation to copy.


When you copy a group reservation, the itineraries and all daily admission programs, program events, custom items, and resources are copied and scheduled with relative dates based on the visit date you entered. The order due dates on the new reservation are based on the default order due dates configured for group sales and are set relatively based on the visit date you entered.



If applicable, the rate scale defined on the original reservation is copied to the new reservation. Payments, contracts, notes, and other documentation items are not copied.

➤ Copy a group reservation


1. From *Sales*, click **Group sales**. The Group Sales page appears.
2. Under **Tasks**, click **Search reservations**. The Reservation Search screen appears.
3. Enter criteria to help you locate the reservation to copy. For example, you can enter the reservation name, the patron's name, the group contact's name, the name of a program included in the order, or the order number. You can also search by date. For more information, see [Search for Reservations on page 164](#).
4. After you enter criteria to help locate the reservation to copy, click **Search**. The **Results** grid displays reservation that meet the criteria you entered.
5. Select the reservation to copy and click **Select**. The reservation record opens.
6. Under **Tasks**, click **Copy reservation**. The Copy reservation screen appears.

Copy reservation

Patron: 


Contact:  


Reservation name:

Visit date: 

[Existing reservations on this date](#)

Reservation	Time	Visitors

 Check for itinerary resource conflicts Ignore itinerary resource conflicts



The patron, group contact, and reservation name default in from the reservation you are copying.

7. If needed, in the **Patron** field, click the magnifying glass to search for a different patron to associate with this reservation. If no record currently exists for the customer, you can add one from the Patron Search screen.
8. The contact information displayed depends on the type of constituent record you selected in the **Patron** field to associate with the reservation.
 - If you selected an organization constituent, the **Contact** field is displayed. This field includes all individuals that have a contact relationship with the organization. Select the individual to use as the contact for this reservation. If needed, you can add a contact relationship for the organization to associate with this reservation. Once a contact is selected or added, the individual's primary phone number and email are displayed. The address displayed is the contact relationship address.

- If you selected an individual in **Patron** field, the individual you selected is also displayed as the contact.
- If you selected a group or household, the contact information of the constituent who is the primary member of the group or household is displayed.

Note: If the reservation is associated with an organization constituent and the contact originally saved on the reservation is deleted from the system or becomes invalid, the system will no longer show that contact on the reservation. Instead, the contact information for the organization will be displayed.

9. For efficiency, the reservation name defaults in from the reservation you are copying. If a different patron or contact is associated with the reservation you can change the name as needed.
10. In the **Visit date** field, enter the date of this group's visitor or facility. If the visit or rental period spans multiple days, you select only the first day here. Any multiple day itineraries you copy along with this reservation will be scheduled on relative days based on the visit date you select. When you edit the group itineraries for this reservation, you can adjust each day of a multiple day visit.
11. After you select a visit date, the grid displays any existing reservations for that same day and provides the time and number of people coming. This enables you to see if there is capacity on the date selected to handle the reservation you are adding.
12. If your organization has set a daily capacity default for group visits, the capacity available on the selected day is displayed along with the capacity needed based on the reservation. Additionally, the **Exceed capacity available** checkbox is displayed. You can mark this checkbox if you are sure a capacity overage can be handled on the day selected.
13. Before you copy the reservation, click **Check for itinerary resource conflicts** to see if conflicts exist for the resources assigned to the itinerary. This checks only the itinerary resources for conflicts, not the itinerary item resources. Itinerary resources are those assigned to the entire itinerary for a group while itinerary item resources are those assigned to each program or custom item scheduled on the itinerary.

If conflicts exist, you can change the visit date or choose to ignore the conflicts. If you select **Ignore itinerary resource conflicts**, make sure you adjust the scheduled itinerary resources after you copy the reservation or verify that the resource conflicts will not be an issue.

14. When you are ready to proceed, click **Save**. The new reservation record appears. The itineraries and all daily admission programs, program events, custom items, and resources are copied and scheduled with relative dates based on the visit date you entered. The order due dates on the new reservation are based on the default order due dates configured for group sales and are set relatively based on the visit date you entered.

If applicable, the rate scale defined on the original reservation is copied to the new reservation. Payments, contracts, notes, and other documentation items are not copied

Warning: In some cases, scheduling conflicts may prevent specific events, programs, or custom items from being successfully copied to the relative dates. If conflicts exist, an exclamation point appears on the Itineraries tab. In these cases, a "non-scheduled item" is displayed on the itinerary as a placeholder. To help identify non-scheduled items, each appears in red and contains a "NOT ADDED" description. Each non-scheduled item should be manually corrected. For information about resolving these issues, see [Resolve Scheduling Conflicts for a Group Itinerary on page 205](#).

Change Group Visit Dates

After a group reservation is booked, you can adjust the dates of the visit or facility rental as needed. For example, if a school calls and needs to change the dates of a field trip they have already booked and paid for, you change the date of the visit to accommodate the new plans.

To change the group visit or facility rental date, you first access the reservation record. To locate a reservation, you can access the Group Sales page and click **Search reservations** or you can view the sales orders for a specific constituent and select the reservation to change.

When you move a group reservation, the itineraries and all daily admission programs, program events, custom items, and resources are intact and scheduled with relative dates based on the new visit date you entered. If applicable, any order due dates defined on the original reservation are moved using relative dates. If a rate scale is assigned to the reservation, it is moved as well along with any payments that have been received. Contracts, notes, and other documentation items stay intact.

Tip: To save time, you can drag and drop a reservation displayed on the reservation calendar to a different day to change the visit date. When you move the reservation to a different day, the Change visit date screen appears so you can check for conflicts before saving. For more information about the reservation calendar, see [View the Group Reservation Calendar on page 154](#).

➤ Change a group visit date

1. From *Sales*, click **Group sales**. The Group Sales page appears.
2. Under **Tasks**, click **Search reservations**. The Reservation Search screen appears.
3. Enter criteria to help you locate the reservation to move. For example, you can enter the reservation name, the patron's name, the group contact's name, the name of a program included in the order, or the order number. You can also search by date. For more information, see [Search for Reservations on page 164](#).
4. After you enter criteria to help locate the reservation to move, click **Search**. The **Results** grid displays reservation that meet the criteria you entered.
5. Select the reservation to move and click **Select**. The reservation record opens.
6. Under **Tasks**, click **Change visit date**. The Change visit date screen appears.
7. In the **New visit date** field, enter the new date for this group's visit or facility rental. If the visit or rental period spans multiple days, you select only the first day here. Multiple day itineraries on this reservation will be scheduled on relative days based on the new visit date you select.
8. After you select a date, the grid displays any existing reservations for that same day and provides the time and number of people coming. This enables you to see if there is capacity on the date selected to handle the reservation you are moving.
9. If your organization has set a daily capacity default for group visits, the capacity available on the selected day is displayed along with the capacity needed based on the reservation. Additionally, the **Exceed capacity available** checkbox is displayed. You can mark this checkbox if you are sure a capacity overage can be handled on the day selected.
10. Before you move the reservation, click **Check for itinerary resource conflicts** to see if conflicts exist for the resources assigned to the itinerary. This checks only the itinerary

resources for conflicts, not the itinerary item resources. Itinerary resources are those assigned to the entire itinerary for a group while itinerary item resources are those assigned to each program or custom item scheduled on the itinerary.

If conflicts exist, you can select a different visit date or choose to ignore the conflicts. If you select **Ignore itinerary resource conflicts**, make sure you adjust the scheduled itinerary resources after you copy the reservation or verify that the resource conflicts will not be an issue.

11. When you are ready to proceed, click **Save**. The reservation record with the new visit date appears. The itineraries and all daily admission programs, program events, custom items, and resources are intact and scheduled with relative dates based on the new visit date you entered. If applicable, any order due dates defined on the original reservation are moved using relative dates. Payments, rate scales, contracts, notes, and other documentation items are also moved.

Warning: In some cases, scheduling conflicts may prevent specific events, programs, or custom items from being successfully moved to the relative dates. If conflicts exist, an exclamation point appears on the Itineraries tab. In these cases, a “non-scheduled item” is displayed on the itinerary as a placeholder. To help identify non-scheduled items, each appears in red and contains a “NOT ADDED” description. Each non-scheduled item should be manually corrected. For information about resolving these issues, see [Resolve Scheduling Conflicts for a Group Itinerary on page 205](#).

Manage Flat Rate Pricing

Flat rate pricing is an alternative to per ticket pricing. It allows you to charge a flat amount for tickets included in a group order instead of calculating the cost per ticket using the price lists assigned to each program in the group’s itinerary. If you select flat rate pricing for a group order, you also designate a rate scale that determines the amount the group is charged. If needed, you can assign a new or updated rate scale to an existing group reservation.

If you use flat rate pricing for a group order, you must configure how the flat rate is applied to each program, fee, resource, or other item in the order. This is necessary to ensure that all items and services purchased are accounted for properly. For example, if a group pays a \$500 flat rate for a group visit that includes three different programs, you must determine how that \$500 is split and applied to the three programs.

Change Rate Scales for Group Reservations

When you add or edit a group reservation, you select whether to use per-ticket or flat rate pricing to calculate the cost of the tickets included in the order. If you select flat rate pricing, you also designate a rate scale that determines the amount the group is charged for tickets, based on the number of people in the group. If needed, you can assign a new or updated rate scale to an existing group reservation.

If you edit a rate scale that is currently in use on reservations and you want the new rate scale values to be updated on reservations, you must access the **Pricing** grid on each reservation record, click **Edit**, and select the updated rate scale. For information about editing rate scales, see [Configure Flat Rate Pricing on page 135](#).

Note: To change the pricing structure assigned to a reservation, under **Pricing**, click **Edit** on the action bar. For more information, see [Edit Group Reservations on page 175](#).

➤ Change the rate scale assigned to a group reservation

1. From *Sales*, click **Group sales**. The Group Sales page appears.
2. On the calendar, select a reservation and on the action bar, click **Go to reservation**. The reservation record appears.
Under **Pricing**, the current rate scale assigned to the reservation is displayed.
3. To select a new or updated rate scale for this group reservation, click **Edit**. The Edit pricing screen appears.
4. In the **Flat rate scale** field, select a new or updated rate scale to assign to this reservation. The base charge for the selected rate scale is displayed. The base charge is the amount the group will be charged based on the current number of attendees on the reservation and new rate scale.
5. Click **Save**. You return to the reservation record, and the new prices for the group are displayed in the grid.

Configure Flat Rate Applications

If you use flat rate pricing for a group order, you must configure how the flat rate is applied to each program, fee, resource, or other item in the order. Applications are generally configured after the group itinerary is scheduled. This is necessary to ensure that all items and services purchased are accounted for properly. You can apply the flat rate to a single item or split it across multiple items. For example, if a group pays a \$500 flat rate for a group visit that includes three different programs, you must determine how that \$500 is split and applied to the three programs.

When you select the Rate Scale tab on a reservation record, the **Flat rate application summary** section displays the rate that the group is being charged and the percentage of that rate that is currently applied. The full flat rate amount must be applied and allocated in order for the group to make payments on the reservation and check in.

In most cases, to successfully configure flat rate applications, you select each program, resource, and fee that is part of the order and edit the corresponding application until 100% of the group rate is applied. Each program or item that is part of the order is displayed in the **Flat rate application items** grid.

The also grid displays any default programs, resources, or fees that have been configured for the selected rate scale. If the default items are not on the itinerary, they have no bearing on the flat rate applications and you do not enter applications for them.

Tip: If your organization routinely sells the same itinerary to multiple groups, you can configure default applications to save time. These are defaults only and can be changes as needed on each group reservation. For more information, see [Configure Default Flat Rate Applications on page 141](#).

➤ Add flat rate applications for a group reservation

This process is typically used to configure fee applications for the group order. You can add program and resource applications as well, but you are simply adding an application to the order.

If you add a program or resource application, you also need to access the group itinerary and schedule the program or resource.

1. From *Sales*, click **Group sales**. The Group Sales page appears.
2. On the calendar, select a reservation and on the action bar, click **Go to reservation**. The reservation record appears.
3. In the **Pricing** grid, click the name of the rate scale. The rate scale page appears.
4. In the **Flat rate application items** grid, click **Add** on the action bar.
5. On this screen, you add applications for specific programs, fees, and resources for this group order. If you add a program or resource application, you also need to access the group itinerary and schedule the program or resource. In the **Application Type** field, select "Program," "Fee," "Supply/Equipment," or "Staffing resource" and select the item to include.
6. In **Amount** field, enter the amount of the flat rate that should be allocated to the selected item.
7. Click **Save**. The item and the amount allocated are displayed in the grid. The total amount allocated is displayed in the **Rate scale** grid and is updated automatically. When you have allocated 100 percent, a green checkmark appears.

Edit Contact Information for Group Reservations

If a group reservation is attached to an individual record, the contact information on the reservation is the individual's primary address, phone, and email. To edit this information, you must access the constituent record. If the group reservation is attached to an organization, you can edit the contact information on the reservation.

Note: If the group reservation is associated with an organization constituent and the contact originally saved on the reservation is deleted from the system or becomes invalid, the system will no longer show that contact on the reservation. Instead, the primary contact information for the organization will be displayed.

Note: If the reservation is associated with an organization, the contact information that appears is based off of an individual's relationship record with the organization. To edit the contact information, from the Relationships tab of the organization's record, select the individual and click **Edit**. On the Contact Information tab make the necessary changes. Any changes you make here will automatically update on the reservation record as well.

➤ Edit the contact for a group reservation

1. From *Sales*, click **Group sales**. The Group Sales page appears.
2. On the calendar, select the reservation to edit and on the action bar, click **Go to reservation**. The reservation record appears.
3. In the **Reservation summary** grid, click **Edit**. The Edit contact information screen appears.

Note: If the group reservation is attached to an organization record, the organization's contact information appears. If the group reservation is attached to an individual record, the contact information on the reservation is the individual's primary address, phone, and email.

4. The **Contact** field displays all individuals that have a contact relationship with the organization, or the individual who made the reservation. Select the individual to use as the contact for this reservation. If needed, you can add a new contact relationship for the organization to associate with this reservation. For more information, see [Add a Contact Relationship on page 163](#). Once a contact is selected or added, the individual's primary phone number and email are displayed. The address displayed is the contact relationship address.

Note: If the reservation is associated with an organization constituent and the contact originally saved on the reservation is deleted from the system or becomes invalid, the system will no longer show that contact on the reservation. Instead, the contact information for the organization will be displayed.

5. If a different address, phone number, or email address should be used for the individual, you can select a different one if available, edit the existing information, or add new information.
6. Click **Save**.

View Group Reservation Order History

If you configure and use reservation defaults to require and calculate due dates for a group deposit, contract, final count, and order balance, the status of an order changes automatically as the order progresses. For example, when you access a reservation record and mark a contract as sent, the status of the order becomes "Tentative." These automatic status changes are displayed on the Order History page of the reservation.

In addition to automatic status changes, you can manually change the status of a reservation as needed or cancel a reservation for a group that has not checked in. To view a history of all status changes, including manual changes and cancellations, access the Order History page of a reservation.

➤ View the order history of a group reservation

1. From *Sales*, click **Group sales**. The Group Sales page appears.
2. On the calendar, select a reservation and on the action bar, click **Go to reservation**. The reservation record appears.

Note: To access canceled reservations and view their order history, you must select the **Show Canceled Group Reservations** filter on the group sales calendar. If this filter is not selected, canceled reservations are not displayed. For more information see, [View the Group Reservation Calendar on page 154](#).

3. Under **Tasks**, click **Go to Order history**. The Order History page appears.

All status changes for the reservation are displayed. In addition to status changes, there are entries and dates related to sending and receiving the contract, final count, and order balance.

Note: Regardless of whether a status change happens automatically, manually, or due to cancellation, all changes are recorded on the Order History page.

Add Important Notes

You can add any additional information or important notes to a reservation if necessary.

To add or edit important notes, in the **Important Notes** grid, click **Edit**. The Edit important notes screen appears. After you enter your note or information, click **Save**. You return to the reservation record.

Delete Group Reservations

In some situations, you may need to delete a group reservation. For example, a group may cancel their plans before a payment has been made or you might create a reservation in error. When you delete a group reservation, it is removed from your database.

Note: If a payment has been received and applied to a reservation, the reservation cannot be deleted. Instead, you must cancel the reservation. Canceling releases any tickets and locations included in the reservation while maintaining a record of the order with a status of "Canceled." For more information, see [Cancel Group Reservations on page 185](#).

You can delete a reservation directly from the reservation calendar. From *Sales*, click **Group sales**. The Group Sales page appears. On the calendar, select the reservation to delete and on the action bar, click **Delete reservation**.

Additionally, you can delete a group reservation by accessing the reservation record. From the reservation record, under **Tasks**, click **Delete reservation**. Once a payment is received and applied to a reservation, the **Delete reservation** task is no longer displayed. Instead you must cancel the reservation. For more information about accessing a reservation record, see [Search for Reservations on page 164](#).

Cancel Group Reservations

In some situations, you may need to cancel a group reservation. You can cancel reservations that have already been fully or partially paid, as well as reservations that have not made any payments. For example, a group may cancel their plans after submitting a deposit. If a payment has been received and applied to a reservation, the reservation cannot be deleted. Instead, you must cancel the reservation, which changes the order status to "Canceled," releases reserved tickets back into inventory, makes reserved locations and non-consumable resources available again, and adds consumable resources back to inventory. Additionally, any staffing resources and the associated jobs assigned to the resources remain on the canceled reservation but are inactive and do not affect scheduling.

Warning: Canceling a reservation does not remove, refund, or affect the payments applied to the reservation in any way. Refunding payments applied to a group reservation is a separate process. For more information, see [Refunds for Group Sales Reservations on page 285](#).

Note: If a reservation has been created in error or a group wants to cancel their plans before a payment has been made, you must first cancel the reservation before you can delete it. For more information, see [Delete Group Reservations on page 185](#).

➤ Cancel a group reservation

1. From *Sales*, click **Group sales**. The Group Sales page appears.
2. On the calendar, select a current reservation that has not been checked in. On the action bar, click **Go to reservation**. The reservation record appears.
3. Under **Tasks**, click **Cancel reservation**. A confirmation screen appears.
4. To continue, click **Yes**. The reservation is canceled and any tickets and locations booked as part of the reservation are released back into inventory. Additionally, any booked non-consumable resources are available again and consumable resources are added back to inventory. If applicable, staffing resources and the associated jobs assigned to the resources remain on the canceled reservation but are inactive.

You can also cancel a reservation directly from the reservation calendar. From *Sales*, click **Group sales**. The Group Sales page appears. On the calendar, select the reservation to cancel and on the action bar, click **Cancel reservation**.

The **Reservation summary** now displays a status of "Canceled" and the Order history tab displays the date and time of the cancellation. Additionally, you can add notes to the Documentation tab on the reservation even after it is canceled.

Tip: If needed, you can still copy a reservation after it has been canceled. For more information, see [Copy Group Reservations on page 177](#). For example, if the group decides they can use the reservation after it has been canceled, you can copy their old reservation to create a new one.

Configure Group Itineraries

You configure group itineraries on the Itineraries tab of a reservation record. When you add a group itinerary to a reservation, you enter a name to identify the itinerary and specify a group leader. You also enter the number of visitors attending and select the ticket price types for each.

Once an itinerary is added, you can schedule the daily programs and events the group will attend during their visit. You can add custom items to the itinerary to schedule things that are not daily programs or scheduled program events. For example, you can use custom items to schedule facility rentals, meals, gift shop visits, and informal tours. If a group requires additional resources, supplies/equipment, or staffing for the itinerary you can schedule resources. For example, you assign two wheelchairs to the itinerary for a group to use for the duration of the visit.

For each reservation, you can add multiple groups with different itineraries. For example, an elementary school may have a single reservation with three group itineraries, one for each class that is visiting. In order to accommodate all three groups, the events on each itinerary may be entirely different or simply be scheduled at staggered times. If an additional class decides to attend, you can add a new group itinerary on the same reservation record.

Add Group Itineraries

When you add a group itinerary, you specify a name for the itinerary, select a group leader, and specify the number of visitors who will attend. To specify the visitors who will attend, you select the appropriate price types and enter the ticket quantity. After you add an itinerary, you can schedule events and activities for the group visit. For more information, see [Schedule Group Itineraries on page 187](#).

If needed, you can add multiple itinerary groups to a reservation. For example, an elementary school may have a single group reservation with three group itineraries, one for each class that is visiting. If an additional class decides to attend, you can add a new group itinerary on the same reservation record.

Note: When you add a group reservation, you have the option of entering the ticket quantity and price types for the people in the group. If you entered the ticket quantity and price types on the reservation and saved, an itinerary is automatically created and displayed on the Itineraries tab of the reservation record. You can then view the itinerary and schedule events and activities for the group to attend during their visit. For more information, see “Schedule Group Itineraries” on page 8.

➤ Add a group itinerary track

1. From *Sales*, click **Group sales**. The Group Sales page appears.
2. Under **Configuration**, click **Manage tracks**. The Tracks page appears.
3. On the action bar, click **Add**. The Add a track screen appears.
4. Enter a name and description for the track. Because tracks are loaded on itineraries by different users, you should make sure the name clearly represents the purpose of the track.
5. Click **Save** and “Day 1” of the track itinerary is displayed. You can now add daily admission programs, scheduled events, and custom items to define the track schedule. For more information, see [Schedule Group Itinerary Tracks on page 152](#).

Schedule Group Itineraries

After you add itineraries for a group visit or facility rental, you customize the itineraries by scheduling the daily admission programs, program events, custom items, and resources the group will need. For example, a third grade class visits the aquarium. A typical itinerary for this group may start off with a custom item for arrival from 8:30 to 9:00. This would be followed by a daily admission program, which is admission to the aquarium, from 9:00 to 12:00. This gives the group three hours to explore the exhibits. For lunch, another custom item is added to the itinerary from 12:00 to 12:45. After lunch, the group attends two timed program events, a shark feeding from 1:00 to 1:30 and then the *Creatures of the Deep* IMAX film from 2:00 to 3:00.

For a facility rental, the typical itinerary involves only a single itinerary with a custom item used to book a location within your facility for a specific period of time. For more information, see [Schedule Custom Items for a Group Itinerary on page 194](#). Although this is the most common situation, a reservation for a facility rental can also include scheduled event tickets or admissions, resources, and other custom items. If there are no tickets included in the reservation, the pricing structure selected on the

reservation does not apply. Instead, pricing is charged according to the amount associated with the location booked.

Tip: Custom items are used to schedule things that are not daily admission programs or program events. For example, you can use custom items to schedule meals, gift shop visits, informal tours, meet-ups, facility rentals, or anything else that is needed.

Typically, a group visit or facility rental involves one day. However, you can schedule a multi-day itinerary that spans up to five days. To schedule a multi-day itinerary, you add programs and custom events to the group itinerary on subsequent days following the date of the visit specified on the reservation. For example, a school calls to book a two day group visit to your organization. When the reservation is booked, the arrival date is entered and saved. When you schedule the itinerary for the visit, you add events for the first day as you would a typical single day itinerary. For the second day, when you add a program, you select the date of the second day in the **Date** field. When you save the program, the new day is added to the itinerary and displayed on the calendar view. A multi-day itinerary can span up to five days starting with the date of the visit.

When you access the itinerary page, the date of the group visit, as well as the ticket price types and quantity of tickets included in the reservation are displayed. The cost is calculated and displayed on the itinerary as you schedule programs for the group. However, the cost is displayed differently depending on the pricing structure selected for the tickets included in the reservation.

- If the pricing structure is "Per ticket," the total cost is calculated and displayed as you add daily admission programs and scheduled events to the itinerary.
- If the pricing structure for the tickets included in the order is "Flat rate pricing," the cost displayed on the itinerary is "0.00." This is true when you add only programs to the itinerary that are included in the corresponding rate scale. If you add programs to the itinerary that are not included in the selected rate scale, the group is charged on a per-ticket basis for those programs. The per-ticket amount is displayed on the itinerary but the flat rate is not. You can view the total cost that includes the flat rate and any per-tickets charges when you return to the reservation record.

Tip: When you schedule a group itinerary, especially a more complicated multi-day itinerary, you may want to start by copying an existing itinerary that is similar. Copying an itinerary is also helpful if a group contacts your organization and wants to book a visit with the same itinerary they had on a previous visit. For more information, see [Copy a Group Itinerary on page 203](#). You can also load predefined group tracks to quickly and consistently schedule itineraries. For more information, see [Load a Track for a Group Itinerary on page 204](#).

Schedule Daily Admission Programs for a Group Itinerary

When you schedule daily admission programs for a group itinerary, you select from a list of programs that have already been added to the system. Once you select a daily admission program, you enter start and end times that are specific to the group.

Unlike scheduled programs that have specific timed events, daily admission programs are usually untimed. Although daily admission programs are untimed, when you add one to an itinerary, you must specify start and end times. For example, an aquarium may have a daily admission program that is untimed and sold all day. These tickets grant access to the facility and the patrons can visit the exhibits throughout the day. However, for a group visit, you must provide start and end times so the group has

a set duration to explore the exhibits. This allows for the scheduling of lunch and other events the group may want to attend.

If needed, you can assign supplies/equipment resources and staffing resources to a daily admissions program. If you assign staffing resources to a program, you should also schedule people to fill those resource positions after you save the program. To schedule people to fill the resource positions assigned to a daily admission program, access the Staffing tab on the reservation record.

If a group's plans change, you can edit the daily admission programs on the itinerary as needed. You can also remove programs from the itinerary.

➤ Add a daily admission program to a group itinerary

1. From *Sales*, click **Group sales**. The Group Sales page appears.
2. On the calendar, select a reservation and on the action bar, click **Go to reservation**. The reservation record appears.
3. Select the Itineraries tab.
4. Locate the itinerary to add a daily admission program to and click **Customize itinerary**. The group itinerary page appears.
5. On the calendar view, select a block of time for the daily admission program. For example, click 9:00 and drag the cursor down to 12:00 to create a three hour program.

Note: Although daily admission programs are usually untimed, when you add one to an itinerary, you must specify a duration with start and end times.

6. On the action bar, click **Add** then select **Daily admission program**. The Add a daily admission program screen appears.
7. In the **Program** field, select the daily admission program to add to the itinerary. Only daily admission programs that are available through the "Group Sales" sales method are displayed in the list.
8. By default, the **Start date** field displays the date of the group visit entered on the reservation.
 - If this is a single day itinerary, do not change the date in this field. Instead, continue to enter the start and end times for the program being scheduled.
 - For a multi-day itinerary, you can select a different date in this field in order to schedule the programs for each day of the group's visit. A multi-day itinerary is limited to five days starting with the date of the visit. For example, to schedule the second day of a multi-day itinerary, you would select the date of the second day in the **Start date** field. When you save the program, the new day is added to the itinerary.

Note: You cannot change the date of a group visit by entering a different date in the **Start date** field. For more information about changing the date of a group visit, see [Change Group Visit Dates on page 180](#).

9. The start and end times are automatically displayed based on the duration you selected on the calendar. For example, if you selected a three hour block of time from 9:00 to 12:00 on the calendar, the **Start time** and **End time** fields will display 9:00 and 12:00 respectively. You can change the start and end times as needed.

10. In the **Notes** field, enter any additional information related to the group program like special requests or other relevant information. For example, the group may want to spend more time at a particular exhibit or request a specific guide. The notes entered here are displayed on the itinerary calendar view, as well as on the printed itinerary.
11. If supplies/equipment or staffing resources are needed for the group's daily admission program, select the Resources tab and add the necessary resources.
12. In the **Supplies/Equipment resources** grid, enter the resource or click the magnifying glass to use the Resource Search screen to find and select the resource. If you selected a per ticket resource, the per ticket quantity needed from the resource displays. If you did not select a per ticket resource, enter the number of resources for the item.
13. In the **Staffing resources** grid, select a resource. For each staffing resource, you can enter the quantity needed, the type of staff to fill the resource, and the job being performed. When you select the job being performed, the name and the description default from when you set up the job type. If you do not select a job being performed, you can enter the name and description manually.

Note: If you assign staffing resources to a daily admission program, you should also schedule people to fill those resource positions. You do this after you save the admission program. To schedule people to fill the resource positions assigned to a daily admission program, access the Staffing tab on the reservation record. For more information, see [Assign People to Fill Staffing Resource Positions for Itineraries and Itinerary Items on page 199](#).

14. Before you schedule the daily admission program, you can check for resource conflicts. However, you can also choose to ignore conflicts.
15. Click **Save**.

➤ Edit a daily admission program on a group itinerary

1. From *Sales*, click **Group sales**. The Group Sales page appears.
2. On the calendar, select a reservation and click **Go to reservation**. The reservation record appears.
3. Select the Itineraries tab.
4. Locate the itinerary to edit and click **Customize itinerary**. The group itinerary page appears.
5. On the itinerary calendar view, select the daily admission program to change and click **Edit**. The Edit a daily admission program screen appears.
6. In the **Program** field, you can select a different daily admission program for the itinerary. Only daily admission programs that are available through the "Group Sales" sales method are displayed in the list.
7. If this is a single day itinerary, you should not change the date displayed in the **Start date** field. To change the date of a group visit, you must edit the reservation. For more information, see [Edit Group Reservations on page 175](#). If this is a multi-day itinerary, you can adjust this date as needed to schedule the program. A multi-day itinerary is limited to five days starting with the date of the visit.

8. You can change the duration of the program by adjusting start and end times as needed. Although daily admission programs are usually untimed, when you add one to an itinerary, you must specify a duration by entering start and end times.
9. In the **Notes** field, enter any additional information related to the group program like special requests or other relevant information. For example, the group may want to spend more time at a particular exhibit or request a specific guide. The notes entered here are displayed on the itinerary calendar view, as well as on the printed itinerary.
10. On the Resources tab, you can edit the resources needed for the group's daily admission program.
11. Click **Save**.

➤ Delete a daily admission program from a group itinerary

1. From *Sales*, click **Group sales**. The Group Sales page appears.
2. On the calendar, select a reservation and click **Go to reservation**. The reservation record appears.
3. Select the Itineraries tab.
4. Locate the itinerary that contains the daily admission program to remove and click **Customize itinerary**. The group itinerary page appears.
5. On the itinerary calendar view, select the daily admission program to remove and click **Delete**. A confirmation screen appears.
6. Click **Yes**. The daily admission program is removed from the itinerary.

Schedule Program Events for a Group Itinerary

When you add a program event to a group itinerary, you select from timed events that have already been scheduled. For example, your organization may have a "Sea Turtles" exhibit that occurs three times a day on Mondays and Wednesdays. To add the "Sea Turtles" event to a group itinerary, you select the "Sea Turtles" program and then select the specific scheduled event occurrence the group will attend.

If needed, you can assign supplies/equipment resources and staffing resources to a program event. If you assign staffing resources to a program event, you should also schedule people to fill those resource positions after you save the event. To schedule people to fill the resource positions assigned to a program event, access the Staffing tab on the reservation record.

Only programs that are available through the "Group Sales" sales method can be added to a group itinerary. To help locate the event to add to the itinerary, you can filter by program, date, and time. Once you select a specific program event, you change the default start and end times to meet the needs of the group. If needed, you can also make the event unavailable to other groups.

Tip: In most cases, the program events you need to pull into a group itinerary will already exist. However, if new events need to be scheduled for a program, a user with the appropriate system role can click **Schedule program** under **Tasks** on the group itinerary page and schedule the necessary program events.

If a group's plans change, you can edit the program events on the itinerary as needed. You can also remove events from the itinerary.

➤ Add a program event to a group itinerary

1. From *Sales*, click **Group sales**. The Group Sales page appears.
2. On the calendar, select a reservation and on the action bar, click **Go to reservation**. The reservation record appears.
3. Select the Itineraries tab.
4. Locate the itinerary to add a scheduled program event to and click **Customize itinerary**. The group itinerary page appears.
5. On the calendar view, select a block of time in which to schedule a program event. For example, click 9:00 and drag the cursor down to 12:00 to add a program event to the itinerary that takes place during that selected period of time.
6. On the action bar, click **Add** then select **Scheduled event**. The Add a scheduled event screen appears.
7. On the General tab, you can filter by program, date, and time to locate the specific event to add to the itinerary. The **Start date** field defaults to the date selected on the calendar view.
 - If this is a single day itinerary, the date displayed is the arrival date and you select program events available on this date.
 - If this is a multi-day itinerary, you can select a different date in this field in order to view events available for each day of the group's visit. A multi-day itinerary is limited to five days starting with the date of the visit.
8. The **Program** field displays all scheduled programs that are available through the "Group Sales" sales method and have events during the date and time selected. Click the down arrow and select a program to view. The times in the **Between** fields are automatically displayed according to the duration you selected on the calendar. You can change the times as needed to expand the programs and events to select from.
9. The grid displays the scheduled events that occur during the specified date and time for the selected program. The availability of each event is also displayed. Select the program event to add to the itinerary. If the grid is empty, there are no events scheduled for the selected program during the date and time entered.

Note: If there are not enough tickets available to accommodate the group, you cannot save the event.

10. When you select an event, the start and end times for the event are displayed under **Item details**. If needed, you can adjust the times for the event to accommodate the group. You can adjust the start time to be any time within the event duration. For example, if the event is from 9:00 to 11:00, you can set the event to begin any time during that two hour period. The end time is not limited to the event duration and can be set outside the default duration as needed.
11. If this event is available only to this group, select **Mark event unavailable to other groups**. If you select this checkbox, this event is blocked from being sold to other groups.
12. In the **Notes** field, enter any additional information related to the group program like special requests or other relevant information. For example, the group may want to spend more time

at a particular exhibit or request a specific guide. The notes entered here are displayed on the itinerary calendar view, as well as on the printed itinerary.

13. If supplies/equipment or staffing resources are needed for the group's scheduled event, select the Additional resources tab and add the necessary resources.
14. In the **Supplies/Equipment resources** grid, enter the resource or click the magnifying glass to use the Resource Search screen to find and select the resource. If you selected a per ticket resource, the per ticket quantity needed from the resource displays. If you did not select a per ticket resource, enter the number of resources for the item.
15. In the **Staffing resources** grid, select a resource. For each staffing resource, you can enter the quantity needed, the type of staff to fill the resource, and the job being performed. When you select the job being performed, the name and the description default from when you set up the job type. If you do not select a job being performed, you can enter the name and description manually.

Note: If you assign staffing resources to a scheduled program event, you should also schedule people to fill those resource positions. You do this after you save the program event. To schedule people to fill the resource positions assigned to a program event, access the Staffing tab on the reservation record. For more information, see [Assign People to Fill Staffing Resource Positions for Itineraries and Itinerary Items on page 199](#).

16. Before you schedule the program event, you can check for resource conflicts. However, you can also choose to ignore conflicts.
17. Click **Save**.

➤ Edit a program event on a group itinerary

1. From *Sales*, click **Group sales**. The Group Sales page appears.
2. On the calendar, select a reservation and click **Go to reservation**. The reservation record appears.
3. Select the Itineraries tab.
4. Locate the itinerary to edit and click **Customize itinerary**. The group itinerary page appears.
5. On the itinerary calendar view, select the program event to change and click **Edit**. The Edit a scheduled event screen appears.
6. The General tab displays the start date, time, location, and other specifics of the event you are editing. If needed, you can filter by program, date, and time to change the event on the itinerary. The **Start date** field defaults to day of the event you selected to edit.
 - If this is a single day itinerary, the date displayed is the arrival date and you select program events available on this date.
 - If this is a multi-day itinerary, you can select a different date in this field in order to view events available for each day the of group's visit. A multi-day itinerary is limited to five days starting with the date of the visit.
7. The **Program** field displays all scheduled programs that are available through the "Group Sales" sales method and have events during the date and time selected. Click the down arrow and select a program to view. The times in the **Between** fields are automatically displayed

according to the duration of the event you are editing. You can change the times as needed to expand the programs and events to select from.

8. The grid displays the scheduled events that occur during the specified date and time for the selected program. The availability of each event is also displayed. Select the program event to add to the itinerary. If the grid is empty, there are no events scheduled for the selected program during the date and time entered.

Note: If there are not enough tickets available to accommodate the group, you cannot save the event.

9. When you select an event, the start and end times for the event are displayed under **Item details**. If needed, you can adjust the times for the event to accommodate the group. You can adjust the start time to be any time within the event duration. For example, if the event is from 9:00 to 11:00, you can set the event to begin any time during that two hour period. The end time is not limited to the event duration and can be set outside the default duration as needed.
10. You can select or clear the **Mark event unavailable to other groups** checkbox. If you select this checkbox, this event is blocked from being sold to other groups.
11. In the **Notes** field, enter any additional information related to the group program like special requests or other relevant information. For example, the group may want to spend more time at a particular exhibit or request a specific guide. The notes entered here are displayed on the itinerary calendar view, as well as on the printed itinerary.
12. On the Additional resources tab, you can edit the resources needed for the group's program event.
13. Before you save the program event, you can check for resource conflicts. However, you can also choose to ignore conflicts.
14. Click **Save**.

➤ Delete a program event from a group itinerary

1. From *Sales*, click **Group sales**. The Group Sales page appears.
2. On the calendar, select a reservation and click **Go to reservation**. The reservation record appears.
3. Select the Itineraries tab.
4. Locate the itinerary that contains the program event to remove and click **Customize itinerary**. The group itinerary page appears.
5. In the itinerary calendar view, select the program event to remove and click **Delete**. A confirmation screen appears.
6. Click **Yes**. The program event is removed from the itinerary.

Schedule Custom Items for a Group Itinerary

Custom items provide the flexibility to schedule things on a group itinerary that are not daily admission programs or program events. For example, with custom items you can schedule things like meals, gift shop visits, informal tours, meet-ups, and facility rentals.

When you schedule a custom item, you select a location where the custom item will take place. For example, you may add a custom item for lunch that takes place in a courtyard or a wedding reception that takes place in the atrium. Before you can add a custom item and assign it a location, a user with the required system permissions must add locations to the system.

The location you select for a custom item can have a price associated with it, which is how a group is charged for a facility rental. If you previously configured default facility prices, when you select a location on a custom item, the default price associated with that location is automatically displayed. If no default has been configured, you simply enter the price as needed.

Tip: When you schedule a custom item and select a location, you can mark the location as unavailable. This prevents other groups from scheduling a custom item at the same location during the same time period.

You can also assign supplies/equipment resources and staffing resources to a custom item. If you assign staffing resources to a custom item, you should also schedule people to fill those resource positions after you save the item. To schedule people to fill the resource positions assigned to a custom item, access the Staffing tab on the reservation record. For more information, see [Assign People to Fill Staffing Resource Positions for Itineraries and Itinerary Items on page 199](#).

Note: If a group's plans change, you can edit the custom items on the itinerary as needed. You can also remove items from the itinerary.

➤ Add a custom item to a group itinerary

1. From *Sales*, click **Group sales**. The Group Sales page appears.
2. On the calendar, select a reservation and on the action bar, click **Go to reservation**. The reservation record appears.
3. Select the Itineraries tab.
4. Locate the itinerary to add a custom item to and click **Customize itinerary**. The group itinerary page appears.
5. On the calendar view, select a block of time in which to schedule a custom item. For example, click 11:00 and drag the cursor down to 12:00 to add a custom item to the itinerary that takes place during that selected period of time.
6. On the action bar, click **Add** then select **Custom item**. The Add a custom item screen appears.
7. In the **Name** field, enter a name for this custom item, for example, "Lunch" or "Wedding Reception."
8. The date and times displayed correspond to the day and block of time you selected on the calendar. You can edit the date and times as needed. If this is a multi-day itinerary, you can add a custom item for any day of the visit by selecting a different date. A multi-day itinerary is limited to five days starting with the date of the visit.
9. In the **Location** field, select the location where the custom item will take place. Click the magnifying glass to search for a specific location.
10. To prevent other groups from scheduling a custom item at the same location during the same time period, select **Mark location unavailable to other users**. If you select this checkbox, the selected location is unavailable for other groups to use during this time.

Note: If the location you selected is associated with a default facility price, **Mark location unavailable to other users** is selected automatically.

11. In the **Price** field, you can enter an additional cost to be charged for using the selected location. This is an optional step that is typically used for facility rentals. If the location you selected is associated with a default facility price, that price is automatically displayed in this field. You can edit the default price as needed. If no default has been configured, you simply enter the correct price.
12. In the **Notes** field, enter any additional information related to the group custom item like special requests or other relevant information. The notes entered here are displayed on the itinerary calendar view, as well as on the printed itinerary.
13. If supplies/equipment or staffing resources are needed for the group's custom item, select the Resources tab and add the necessary resources.
14. In the **Supplies/Equipment resources** grid, enter the resource or click the magnifying glass to use the Resource Search screen to find and select the resource. If you selected a per ticket resource, the per ticket quantity needed from the resource displays. If you did not select a per ticket resource, enter the number of resources for the item.
15. In the **Staffing resources** grid, select a resource. For each staffing resource, you can enter the quantity needed, the type of staff to fill the resource, and the job being performed. When you select the job being performed, the name and the description default from when you set up the job type. If you do not select a job being performed, you can enter the name and description manually.

Note: If you assign staffing resources to a custom item, you should also schedule people to fill those resource positions. You do this after you save the custom item. To schedule people to fill the resource positions assigned to a custom item, access the Staffing tab on the reservation record. For more information, see [Assign People to Fill Staffing Resource Positions for Itineraries and Itinerary Items on page 199](#).

16. Before you schedule the custom item, you can check for location or resource conflicts. However, you can also choose to ignore conflicts.
17. Click **Save**.

➤ Edit a custom item on a group itinerary

1. From *Sales*, click **Group sales**. The Group Sales page appears.
2. On the calendar, select a reservation and click **Go to reservation**. The reservation record appears.
3. Select the Itineraries tab.
4. Locate the itinerary to edit and click **Customize itinerary**. The group itinerary page appears.
5. On the itinerary calendar view, select the custom item to change and click **Edit**. The Edit custom item screen appears.
6. You can change the name, date, and times for the custom item as needed. If this is a multi-day itinerary, you can move the custom item to any day of the visit by selecting a different date. A multi-day itinerary is limited to five days starting with the date of the visit.

7. To move the item to a different location, edit the **Location** field. To prevent other groups from scheduling a custom item at the same location during the same time period, select **Mark event unavailable to other groups**. If you select this checkbox, the selected location is unavailable for other groups to use during this time.
8. In the **Price** field, you can enter an additional cost to be charged for using the selected location. This is an optional step that is typically used for facility rentals. If the location you selected is associated with a default facility price, that price is automatically displayed in this field. You can edit the default price as needed. If no default has been configured, you simply enter the correct price.
9. In the **Notes** field, enter any additional information related to the group custom item like special requests or other relevant information. The notes entered here are displayed on the itinerary calendar view, as well as on the printed itinerary.
10. On the Resources tab, you can edit the resources needed for the group's custom item.
11. Click **Save**.

➤ Delete a custom item from a group itinerary

1. From *Sales*, click **Group sales**. The Group Sales page appears.
2. On the calendar, select a reservation and click **Go to reservation**. The reservation record appears.
3. Select the Itineraries tab.
4. Locate the itinerary that contains the custom item to remove and click **Customize itinerary**. The group itinerary page appears.
5. On the itinerary calendar view, select the custom item to remove and click **Delete**. A confirmation screen appears.
6. Click **Yes**. The custom item is removed from the itinerary.

Schedule Resources for a Group Itinerary

Supplies/Equipment resources are items you may require for a group visit such as workbooks, wheelchairs, or tables. Staffing resources are people such as volunteers, staff, or board members, you need for a group visit. Staffing resources can perform a variety of job types as the resource on an itinerary. For example, you may need a volunteer to act as an interpreter when a large school visits an exhibition.

When you add resources, supplies/equipment, and staffing to a group itinerary you request them for the entire visit in addition to the resources required for scheduled events, custom items, and daily admission programs.

The processes described here is for scheduling resources that are needed for an itinerary. These resources are separate from those that may be required for events, programs or custom items on the group itinerary. For information about scheduling resources for specific events, programs or custom items on group itineraries, see the respective scheduling itinerary section. For example, for information about scheduling resources for a custom item added to an itinerary, see [Schedule Custom Items for a Group Itinerary on page 194](#).

➤ Schedule supplies/equipment resources for a group itinerary

1. From *Sales*, click **Group sales**. The Group Sales page appears.
2. On the calendar, select a reservation and on the action bar, click **Go to reservation**. The reservation record appears.
3. Select the Itineraries tab.
4. Locate the itinerary to add a resource to and click **Customize itinerary**. The group itinerary page appears.
5. On the Resources tab, in the **Supplies/Equipment resources** grid, click **Schedule resources**. The Schedule supplies/equipment resources for itinerary screen appears.
6. In the **Resource** column, enter the resource or click the magnifying glass to use the Resource Search screen to find and select the resource.
7. If you selected a per ticket resource, the per ticket quantity needed from the resource displays. If you did not select a per ticket resource, in the **Quantity needed** column, enter the number of resources required.
8. Add as many supplies/equipment resources as you need for the group itinerary.
9. Before you schedule the resources, you can check for conflicts. However, you can also choose to ignore conflicts.

Note: If a conflict does exist, the Conflicts with itinerary screen appears for you to see how you need to adjust the resources. If you choose to ignore the conflict, you can schedule the resources anyway even if the supply is not sufficient.

10. Click **Save**. You return to the Resources tab on the group itinerary.

➤ Schedule staffing resources for a group itinerary

1. From *Sales*, click **Group sales**. The Group Sales page appears.
2. On the calendar, select a reservation and on the action bar, click **Go to reservation**. The reservation record appears.
3. Select the Itineraries tab.
4. Locate the itinerary to add a resource to and click **Customize itinerary**. The group itinerary page appears.
5. On the Resources tab, in the **Staffing resources** grid, click **Add**. The Add a staffing resource screen appears.
6. Select a staffing resource and enter the quantity needed for the group itinerary.
7. In the **Filled by** field, select who can perform as the resource such as a volunteer, a staff member, or a board member.
8. Select the job being performed or under **Job Details**, enter the name and description of the job. For example, you need a volunteer to help with large tour group visit. On the itinerary, you select the resource as Gift Shop Staff and the job being performed as Cashier.

Note: If you select a job being performed, the name and description default from the job type.

9. Before you schedule the resources, you can check for conflicts. However, you can also choose to ignore conflicts.
10. Click **Save**. You return to the Resources tab on the group itinerary.

Note: If you assign staffing resources you should also schedule people to fill those resource positions. To schedule people to fill the resource positions assigned to an itinerary, access the Staffing tab on the reservation record. For more information, see [Assign People to Fill Staffing Resource Positions for Itineraries and Itinerary Items on page 199](#).

➤ Edit staffing resources for a group itinerary

1. From *Sales*, click **Group sales**. The Group Sales page appears.
2. On the calendar, select a reservation and click **Go to reservation**. The reservation record appears.
3. Select the Itineraries tab.
4. Locate the itinerary to add a resource to and click **Customize itinerary**. The group itinerary page appears.
5. On the Resources tab, in the **Staffing resources** grid, select the staffing resource to change and click **Edit**. The Edit staffing resource screen appears.
6. In the **Quantity needed** field, edit the number of resources you need for the group itinerary.

Note: To edit the people scheduled to fill the resource positions assigned to an itinerary, access the Staffing tab on the reservation record. For more information, see [Assign People to Fill Staffing Resource Positions for Itineraries and Itinerary Items on page 199](#).

7. Click **Save**. You return to the Resources tab on the group itinerary.

➤ Delete staffing resources for a group itinerary

On the Resources tab of a group itinerary, you can delete staffing resources you no longer need. In the **Staffing Resources** grid, select the staff resource you no longer need and on the action bar, click **Delete**. A confirmation screen appears. Click **Yes** and you return to the group itinerary.

Assign People to Fill Staffing Resource Positions for Itineraries and Itinerary Items

If you assign staffing resources to an itinerary or to scheduled events, daily admission programs, or custom items on an itinerary, you should also schedule people to fill those resource positions.

For efficiency, you assign people to fill all staffing resource positions required for a reservation on the Staffing tab of a reservation record. The Staffing tab appears on a reservation record only if staffing resources were scheduled for an itinerary or an itinerary item that is part of the reservation. Itinerary items can include scheduled events, daily admission programs, and custom items.

Resource	Assigned to	Start time	End time	Itinerary	Itinerary item	Needed
Unassigned						
Docent	(Unassigned)	9:00 AM	2:00 PM	Samantha Andrews		1
Assigned						
Docent	Mark D. Adamson	9:00 AM	2:00 PM	Samantha Andrews		

This provides one central location for managing the people that will fill all staffing positions for a reservation, including those that will be filled by staff, board members, and volunteers. Until all positions are filled, a yellow exclamation mark is displayed on the Staffing tab to notify you that your attention is needed.

➤ Assign a volunteer to fill a resource position

1. From *Sales*, click **Group sales**. The Group Sales page appears.
2. On the calendar, select a reservation and on the action bar, click **Go to reservation**. The reservation record appears.
3. Select the Staffing tab. This tab appears on a reservation record only if you have added staffing resources to an itinerary or an itinerary item. After you select the tab, in the **Unassigned** section, you will see each staffing resource position that needs to be filled.

Note: If a resource position has been added for an itinerary or itinerary item on the reservation but no person has been assigned, a yellow exclamation mark is displayed on the Staffing tab to notify you that your attention is needed. Once all positions have been assigned, the yellow exclamation mark no longer appears.

4. In the grid, select a position to be filled by a volunteer and click **Assign**. The Assign volunteers screen appears. The position that needs to be filled and the date and time required are displayed at the top of the screen.

Assign volunteers

Docent for Martin A. Schultz
5/14/2010 9:00 AM - 2:00 PM

Potential volunteers

Only show volunteers available this date and time

Match	Name
100%	Elizabeth A. Ashton
50%	Mark D. Adamson

Assigned volunteers

Docent: 1 openings

Name

Search for a volunteer

Other assignments

Assignments for selected volunteer:

Itinerary information

Number of visitors: 10
Patron: AAA Concrete
Leader: Martin A. Schultz

Save Cancel

- By default, the **Potential volunteers** grid displays all volunteers in your database that are a type match for the position and are available during the time period required. To display volunteers who are a type match but do not have specific availability for the date and time, clear the **Only show volunteers available this date and time** checkbox.

Note: Volunteers displayed in the grid are sorted based on trait match percentage. Trait match percentage shows the percentage of traits listed for the job that are possessed by the volunteer. For example, if there are four traits listed on the job and the volunteer has three of them, that volunteer would be a 75% match. Traits with multiple levels require the volunteer to have at least the specified level for the trait to be considered a match.

- Select a volunteer and click the arrow to move them to the **Assigned volunteers** grid. If needed, you can unassign this volunteer by moving them back to the **Potential volunteers** grid using the arrow.

Note: To help you avoid overloading volunteers when assigning tasks, the **Other assignments** section at the bottom of the screen displays other jobs assigned to the selected volunteer. This section will display up to four jobs that are the closest in time and date to the position you are trying to fill.

- If there are no volunteers that have availability defined for the required period of time or to select a different person from those listed, click **Search for a volunteer** to select a specific volunteer in your database. Once you locate a volunteer using the Volunteer Search screen and click **Select**, you return to the Assign volunteers screen and the person you selected is listed in the **Assigned volunteers** grid.
- Click **Save**. You return to the Staffing tab and the position is filled. It is now displayed in the **Assigned** section of the tab.

➤ Assign a staff or board member to fill a resource position

1. From *Sales*, click **Group sales**. The Group Sales page appears.
2. On the calendar, select a reservation and on the action bar, click **Go to reservation**. The reservation record appears.
3. Select the Staffing tab. This tab appears on a reservation record only if you have added staffing resources to an itinerary or an itinerary item. After you select the tab, in the **Unassigned** section, you will see each staffing resource position that needs to be filled.

Note: If a resource position has been added for an itinerary or itinerary item on the reservation but no person has been assigned, a yellow exclamation mark is displayed on the Staffing tab to notify you that your attention is needed.

4. In the grid, select a position to be filled by a staff member or board member and click **Assign**. The Scheduling staff resources screen appears.
5. In the **Assigned staff** grid, click the magnifying glass to search for a person who can fill the staffing resource role. If the position was configured to be filled by a staff member, the Staff Search screen appears. If the position was configured to be filled by a board member, the Board Member search screen appears. On the search screen, enter information to help locate the person and click **Search**.
6. In the **Results** grid, select the staff or board member who should fill this position and click **Select**. You return to the Scheduling staff resources screen and the person you selected is displayed in the **Name** column.
7. Click **Save**. You return to the Staffing tab and the position is filled. It is now displayed in the **Assigned** section of the tab.

Clear a Group Itinerary

When you schedule a group itinerary, especially a more complicated multi-day itinerary, you may need to quickly clear the itinerary and start over. For example, the contact for a group may call and request drastic changes to the itinerary. Instead of removing or editing each scheduled program, event, or custom item individually, you can clear them all at once and start over. If you clear an itinerary, you remove all daily admission programs, scheduled program events, and custom items currently scheduled for the group.

➤ Clear a group itinerary

1. From *Sales*, click **Group sales**. The Group Sales page appears.
2. On the calendar, select a reservation and on the action bar, click **Go to reservation**. The reservation record appears.
3. Select the Itineraries tab.
4. Locate the itinerary to clear and click **Customize itinerary**. The group itinerary page appears.
5. Under **Tasks** on the explorer bar, click **Clear itinerary**. A confirmation screen appears.

6. Click **Yes**. All daily admission programs, scheduled program events, and custom items scheduled for the group are removed and the cost displayed on the itinerary is \$0.00.

Copy a Group Itinerary

When you schedule a group itinerary, especially a more complicated multi-day itinerary, you may want to start by copying an existing itinerary that is similar. Copying an itinerary is also helpful if a group contacts your organization and wants to book a visit with the same itinerary they had on a previous visit.

This is also helpful if you have a single reservation with multiple groups. Because each group will have a similar itinerary, you can schedule the initial itinerary for the first group and then copy that itinerary when scheduling the other groups.

Warning: When you copy a group itinerary, all daily admission programs, program events, custom items, and notes from the source itinerary are copied to the target itinerary. Any existing programs, items, or notes in the target itinerary will be overwritten during the copy process.

➤ Copy a group itinerary

1. From *Sales*, click **Group sales**. The Group Sales page appears.
2. On the calendar, select a reservation and on the action bar, click **Go to reservation**. The reservation record appears.
3. Select the Itineraries tab.

Note: When you copy a group itinerary, you have a source and a target. All daily admission programs, program events, custom items, and notes from the source itinerary are copied to the target itinerary.

4. Select the target itinerary. This is the itinerary you will copy an existing itinerary into.
5. Click **Customize itinerary**. The group itinerary page appears.
6. Under **Tasks**, click **Copy another itinerary**. The Copy itinerary screen appears.
7. In the **Reservation** field, select the reservation that contains the itinerary to copy. This field defaults to the current reservation. To search for a different reservation, click the magnifying glass.
8. The **Itinerary** field displays the itineraries for the selected reservation. Review the itineraries and select the one to copy. When you select an itinerary, the daily admission programs, program events, and custom items that exist on that itinerary are displayed.

Warning: Any existing programs, items, or notes in the target itinerary will be overwritten during the copy process.

9. Before you copy the itinerary, click **Check for itinerary resource conflicts** to see if conflicts exist for the resources assigned to the itinerary. This checks only the itinerary resources for conflicts, not the itinerary item resources. Itinerary resources are those assigned to the entire itinerary for a group while itinerary item resources are those assigned to each program or custom item scheduled on the itinerary.

If conflicts exist, you can change the visit date or choose to ignore the conflicts. If you select **Ignore itinerary resource conflicts when saving**, make sure you adjust the scheduled

itinerary resources after you copy the reservation or verify that the resource conflicts will not be an issue.

10. When you are ready to proceed, click **Save**. You return to the itinerary, which now contains the daily admission programs, scheduled program events, custom items, and notes from the itinerary you copied. The current cost for the group is displayed on the left.

Warning: In some cases, scheduling conflicts may prevent specific events, programs, or custom items from being successfully added to the itinerary. In these cases, a “non-scheduled item” is displayed on the itinerary as a placeholder. To help identify non-scheduled items, each appears in red and contains a “NOT ADDED” description. Each non-scheduled item should be manually corrected. For information about resolving these issues, see [Resolve Scheduling Conflicts for a Group Itinerary on page 205](#).

11. If the events, daily admission programs, or custom items you copied from the source itinerary require staff resources, you must schedule people to fill those resource positions. For more information, see [Assign People to Fill Staffing Resource Positions for Itineraries and Itinerary Items on page 199](#).

Load a Track for a Group Itinerary

Tracks are like templates you build and use to efficiently schedule itineraries for group visits. Tracks are especially helpful if your organization gets a large number of groups requesting the same type of visit or you want to develop specific curriculum-based visits. Once tracks are defined, you load them when scheduling an itinerary. For information about defining tracks, see [Build Group Itinerary Tracks on page 144](#).

Warning: When you load a track for a group itinerary, all daily admission programs, program events, custom items, and notes that exist in the itinerary are overwritten.

➤ Load a track for a group itinerary

1. From *Sales*, click **Group sales**. The Group Sales page appears.
2. On the calendar, select a reservation and click **Go to reservation**. The reservation record appears.
3. On the Itineraries tab, select the itinerary to schedule using a track and click **Customize itinerary**. The group itinerary page appears.
4. Under **Tasks**, click **Load track**. The Load a track screen appears.
5. In the **Tracks** field, click the magnifying glass to search for a track to load. On the search screen, you can enter the name of a track to narrow the search or search by a program contained in the track.
6. In the search results, select the track to load and click **Select**. You return to the Load a track screen and the programs, events, and custom items scheduled for the track are displayed. To search for a different track, click the magnifying glass again.
7. Before you load a track, click **Check for itinerary resource conflicts** to see if conflicts exist for the resources assigned to the itinerary. This checks only the itinerary resources for conflicts, not the itinerary item resources. Itinerary resources are those assigned to the entire itinerary

for a group while itinerary item resources are those assigned to each program or custom item scheduled on the itinerary.

If conflicts exist, you can change the visit date or choose to ignore the conflicts. If you select **Ignore itinerary resource conflicts when saving**, make sure you adjust the scheduled itinerary resources after you copy the reservation or verify that the resource conflicts will not be an issue.

8. Once you find the track to load, click **Save**. You return to the itinerary, which now contains the daily admission programs, scheduled program events, custom items, and notes from the track you loaded. The current cost for the group is displayed on the left.

Warning: In some cases, scheduling conflicts may prevent specific events, programs, or custom items from being successfully added to the itinerary. In these cases, a “non-scheduled item” is displayed on the itinerary as a placeholder. To help identify non-scheduled items, each appears in red and contains a “NOT ADDED” description. Each non-scheduled item should be manually corrected. For information about resolving these issues, see [Resolve Scheduling Conflicts for a Group Itinerary on page 205](#).

9. If the events, daily admission programs, or custom items you loaded from the track require staff resources, you must schedule people to fill those resource positions. For more information, see [Assign People to Fill Staffing Resource Positions for Itineraries and Itinerary Items on page 199](#).

Resolve Scheduling Conflicts for a Group Itinerary

When you schedule a group itinerary by loading a track or copying another itinerary, you may encounter schedule conflicts, resource conflicts, or other availability issues. For example, if you load a track that contains an event that is not available on the day of the itinerary, the event is not scheduled. Instead, a placeholder for the event is displayed on the itinerary.

If conflicts exist for an itinerary, an exclamation point appears on the Itineraries tab. To clearly identify the non-scheduled items from those that were successfully scheduled, a red placeholder items appears on the itinerary with a “NOT ADDED” description. To resolve this type of issue, you select the non-scheduled item and click **Schedule missing event**.

Note: As an alternative, you can always delete a non-scheduled item from the itinerary to remove the conflict and add a new event, program, or item as needed.

There are multiple situations that could cause a conflict or scheduling issue when loading a track or copying an itinerary. The following table provides a description of each issue and the suggested resolution.

Issue	Resolution
Event or program is inactive.	Select the non-scheduled item and click Find another event .

Issue**Resolution**

Event does not have enough capacity for the itinerary.

Select the non-scheduled item and click **Find another event**.

Event is blocked by another itinerary. This means that on another itinerary, the event you want is marked as unavailable to other groups.

Select the non-scheduled item and click **Find another event**. Or you can access the event causing the conflict and clear the **Mark event unavailable to other groups** checkbox.

Event or program is missing a price type required by the itinerary.

Select the non-scheduled item and click **Find another event** or **Find another program**.

Event not scheduled on the specified date or time.

Select the non-scheduled item and click **Schedule missing event**.

Daily admission program inactive.

Select the non-scheduled item and click **Find another program**.

Custom item blocked by another item. This means that on another itinerary, the custom item you want has a location that is marked as unavailable to other groups. Or, it could mean the capacity for a location has already been reached.

Access the item causing the conflict and clear the **Mark location unavailable to other groups** checkbox. Or, select the non-scheduled item and click **Resolve** to choose a different location.

Resource conflicts.

Select the non-scheduled item and click **Resolve**. Or you can access the resource in conflict, under Configuration click **Resources**, and order more resources.

➤ Schedule missing event

During this process, you schedule a new event for a group itinerary to replace a non-scheduled item. This is necessary when a track is loaded or an itinerary copied and an event cannot be scheduled because it does not exist on the date or time specified by the new itinerary.

1. From *Sales*, click **Group sales**. The Group Sales page appears.
2. On the calendar, select a reservation and click **Go to reservation**. The reservation record appears.
3. On the Itineraries tab, select the itinerary to view and click **Customize itinerary**. The group itinerary page appears.
4. Select a non-scheduled item that was created when an event could not be scheduled for an itinerary due to date and time issues. When you select this type of non-scheduled item, the **Schedule missing event** button is displayed.

Note: To clearly identify non-scheduled items resulting from a conflict, each is displayed on the itinerary calendar in red with a "NOT ADDED" description.

5. On the action bar, click **Schedule missing event**. The Schedule missing event screen appears.

Schedule missing event

General | Event resources | On-sale information | Prices

General | Time

Name: Sea Life Lecture | Start date: 12/17/2009 | 11:00 AM

Description: | End date: 12/17/2009 | 11:30 AM

Mark event unavailable to other groups

Locations | Notes:

Location: Lecture Hall | Capacity: 100

Program spans multiple locations

Check for conflicts | Ignore conflicts when saving

Save | Cancel

Note: As an alternative, you can always delete a non-scheduled item from the itinerary to remove the conflict and add a new event, program, or item as needed.

6. The **Name** and **Description** fields default to the name and description of the program that could not be scheduled when the track was loaded or itinerary copied. If needed, you can enter a new name and description for this event.
7. The **Location** field defaults in from the program. If there is a single location assigned, it is displayed along with the **Program spans multiple locations** link. If multiple locations were assigned to the program, a grid appears displaying each. To assign a new location, click the magnifying glass. At least one location is required.
8. The **Capacity** field defaults in from the location assigned to the program. If more than one location is marked as a default, the smallest capacity appears here. If no default locations were entered on the program, this field is blank. If needed, you can change the capacity in this field to meet the needs of the event.
9. The date and times for the event are determined by the track that was loaded or itinerary copied. The **Start date** field is not editable. If the event should span multiple days, you can change the date in the **End date** field. You can also change the event start and end times if they need to be adjusted.
10. If this event is available only to this group, select **Mark event unavailable to other groups**. If you select this checkbox, this event is blocked from being sold to other groups.

11. In the **Notes** field, enter any additional information related to the program event like special requirements or other relevant information.
12. If supplies/equipment or staffing resources are needed for the event, select the Event resources tab and add the necessary resources.
13. In the **Supplies/Equipment resources** grid, enter the resource or click the magnifying glass to use the Resource Search screen to find and select the resource. If you selected a per ticket resource, the per ticket quantity needed from the resource displays. If you did not select a per ticket resource, enter the number of resources for the item.
14. In the **Staffing resources** grid, select a resource. For each staffing resource, you can enter the quantity needed and the type of staff to fill the resource.

Note: If you assign staffing resources when scheduling the event, you should also schedule people to fill those resource positions. You do this after you save the event by accessing the Staffing tab on the reservation record. For more information, see [Assign People to Fill Staffing Resource Positions for Itineraries and Itinerary Items on page 199](#).

Tip: To resolve resource conflicts before you save, select **Check for conflicts**. You can also select to ignore resource conflicts, if any exist, and save the event.

15. Select the On-sale information tab to view sales methods and ticket availability for the event. The information on this tab defaults from the program. For example, if this event is available for sale only to groups, "Group Sales" should be the only sales method displayed in the grid. To make an additional sales method valid for this event, in the **Sales Method** column, click a blank row and select a method. To remove a sales method, select a row and click **DELETE** on your keyboard. To change when ticket sales begin for a specific sales method, edit the associated date and time.
16. To review the prices for the event, select the Prices tab. By default, the event uses the pricing configured for the program. To enter new prices or load a different price list, clear the **Use program prices** checkbox and additional options are displayed. You can edit the prices and price types in the grid as needed to create custom prices for this event or you can load a different price list.
17. After the event information is complete, click **Save**. You return to the itinerary and the new event is displayed while the corresponding non-scheduled item is removed.

➤ Find another event

During this process, you find an existing event to replace a non-scheduled item on a group itinerary. This is necessary when a track is loaded or an itinerary copied and an event cannot be scheduled for one of the following reasons: the event or program is inactive or missing a price type required by the itinerary, the event does not have enough capacity for the group, or the event is blocked by another itinerary.

1. From *Sales*, click **Group sales**. The Group Sales page appears.
2. On the calendar, select a reservation and click **Go to reservation**. The reservation record appears.
3. On the Itineraries tab, select the itinerary to view and click **Customize itinerary**. The group itinerary page appears.

- Select a non-scheduled item that was created when an event could not be scheduled for one of the following reasons: the event or program is inactive or missing a price type required by the itinerary, the event does not have enough capacity for the group, or the event is blocked by another itinerary. When you select a non-scheduled item of this type, the **Find another event** button is displayed.

Note: To clearly identify non-scheduled items resulting from a conflict, each is displayed on the itinerary calendar in red with a "NOT ADDED" description.

- On the action bar, click **Find another event**. The Find another event screen appears.

Find another event

General Additional resources

Select event

Start date: 12/17/2009 Program: [] Between: 1:00 PM and 2:00 PM

Name	Time	Availability	Location	Supplies/Equipment resour...	Staffing resources
Sharks - Monste...	1:00 PM - 2:00 PM	300	IMAX Theater		
Sea Turtles Tan...	1:00 PM - 1:30 PM	25	Sea Turtle Tank		
Sea Turtles Tan...	1:30 PM - 2:00 PM	25	Sea Turtle Tank		

Item details

Start date: 12/17/2009 1:00 PM

End date: 12/17/2009 2:00 PM

Mark event unavailable to other groups

Notes: []

Check for conflicts Ignore conflicts when saving

Save Cancel

- To help locate a replacement event, the program, start date, and times displayed on the General tab are the same as the non-scheduled item you are replacing. If needed, you can adjust the program, date, and time filters to locate a different event to add to the itinerary.

Note: As an alternative, you can always delete a non-scheduled item from the itinerary to remove the conflict and add a new event, program, or item as needed.

- Typically, you will not change the date in the **Start date** field because you want a replacement event that occurs on the same day as the selected non-scheduled item. However, if this is a multi-day itinerary, you can change the start date to look for events that occur on another day during the group's visit.

8. The **Program** field displays all scheduled programs that are available through the “Group Sales” sales method and have events during the date and time selected. Click the down arrow and select a program to view. The times in the **Between** fields are automatically displayed according to the duration of the non-scheduled item you are replacing. You can change the times as needed to expand the programs and events to select from.
9. The grid displays the scheduled events that occur during the specified date and time for the selected program. The availability of each event is also displayed. Select the program event to add to the itinerary. If the grid is empty, there are no events scheduled for the selected program during the date and time entered.

Note: If there are not enough tickets available to accommodate the group, you cannot save the event.

10. When you select an event, the start and end times for the event are displayed under **Item details**. If needed, you can adjust the times for the event to accommodate the group. You can adjust the start time to be any time within the event duration. For example, if the event is from 9:00 to 11:00, you can set the event to begin any time during that two hour period. The end time is not limited to the event duration and can be set outside the default duration as needed.
11. If this event is available only to this group, select **Mark event unavailable to other groups**. If you select this checkbox, this event is blocked from being sold to other groups.
12. In the **Notes** field, enter any additional information related to the group program like special requests or other relevant information. For example, the group may want to spend more time at a particular exhibit or request a specific guide. The notes entered here are displayed on the itinerary calendar view, as well as on the printed itinerary.
13. If supplies/equipment or staffing resources are needed for the event, select the Additional resources tab and add the necessary resources.
14. In the **Supplies/Equipment resources** grid, enter the resource or click the magnifying glass to use the Resource Search screen to find and select the resource. If you selected a per ticket resource, the per ticket quantity needed from the resource displays. If you did not select a per ticket resource, enter the number of resources for the item.
15. In the **Staffing resources** grid, select a resource. For each staffing resource, you can enter the quantity needed and the type of staff to fill the resource.

Note: If you assign staffing resources when scheduling the event, you should also schedule people to fill those resource positions. You do this after you save the event by accessing the Staffing tab on the reservation record. For more information, see [Assign People to Fill Staffing Resource Positions for Itineraries and Itinerary Items on page 199](#).

Tip: To resolve resource conflicts before you save, select **Check for conflicts**. You can also select to ignore resource conflicts, if any exist, and save the event.

16. After the event information is complete, click **Save**. You return to the itinerary and the new event is displayed while the corresponding non-scheduled item is removed.

> Find another program

During this process, you find an existing daily admission program to replace a non-scheduled item on a group itinerary. This is necessary when a track is loaded or an itinerary copied and a daily

admission program cannot be scheduled because the program is either inactive or missing a price type required by the itinerary.

1. From *Sales*, click **Group sales**. The Group Sales page appears.
2. On the calendar, select a reservation and click **Go to reservation**. The reservation record appears.
3. On the Itineraries tab, select the itinerary to view and click **Customize itinerary**. The group itinerary page appears.
4. Select a non-scheduled item that was created when a daily admission program could not be scheduled because the program is either inactive or missing a price type required by the itinerary. When you select a non-scheduled item of this type, the **Find another program** button is displayed.

Note: To clearly identify non-scheduled items resulting from a conflict, each is displayed on the itinerary calendar in red with a "NOT ADDED" description.

5. On the action bar, click **Find another program**. The Find another program screen appears.
6. To help locate a replacement, the program, start date, and times displayed on the General tab are the same as the non-scheduled item you are replacing. If needed, you can adjust the program, date, and time filters to locate a different program to add to the itinerary.

Note: As an alternative, you can always delete a non-scheduled item from the itinerary to remove the conflict and add a new event, program, or item as needed.

7. The **Program** field displays all daily admission programs that are available through the "Group Sales" sales method during the date and time selected. To select a different program from the non-scheduled item you are replacing, click the down arrow and select a program.
8. Typically, you will not change the date in the **Start date** field because you want a replacement program that occurs on the same day as the selected non-scheduled item. However, if this is a multi-day itinerary, you can change the start date to schedule a replacement program that occur on another day during the group's visit.
9. The start and end times are automatically displayed based on the duration of the non-scheduled program you are replacing. For example, if the program was scheduled for a three hour block of time from 9:00 to 12:00 on the calendar, the **Start time** and **End time** fields will display 9:00 and 12:00 respectively. You can change the start and end times as needed.
10. In the **Notes** field, enter any additional information related to the group program like special requests or other relevant information. For example, the group may want to spend more time at a particular exhibit or request a specific guide. The notes entered here are displayed on the itinerary calendar view, as well as on the printed itinerary.
11. If supplies/equipment or staffing resources are needed for the program, select the Resources tab and add the necessary resources.
12. In the **Supplies/Equipment resources** grid, enter the resource or click the magnifying glass to use the Resource Search screen to find and select the resource. If you selected a per ticket resource, the per ticket quantity needed from the resource displays. If you did not select a per ticket resource, enter the number of resources for the item.

13. In the **Staffing resources** grid, select a resource. For each staffing resource, you can enter the quantity needed, the type of staff to fill the resource, and the job being performed. When you select the job being performed, the name and the description default from when you set up the job type. If you do not select a job being performed, you can enter the name and description manually.

Note: If you assign staffing resources for the program, you should also schedule people to fill those resource positions. You do this after you save the program by accessing the Staffing tab on the reservation record. For more information, see [Assign People to Fill Staffing Resource Positions for Itineraries and Itinerary Items on page 199](#).

Tip: To resolve resource conflicts before you save, select **Check for conflicts**. You can also select to ignore resource conflicts, if any exist, and save the program.

14. After the program information is complete, click **Save**. You return to the itinerary and the new daily admission program is displayed while the corresponding non-scheduled item is removed.

➤ **Resolve a resource or location conflict**

When you load a track or copy an itinerary, you may need to resolve a location conflict. Resource conflicts can occur on daily admission programs, scheduled events, and custom items. If a resource conflict exists, you can resolve the conflict before you schedule the program, event, or item.

1. From *Sales*, click **Group sales**. The Group Sales page appears.
2. On the calendar, select a reservation and click **Go to reservation**. The reservation record appears.
3. On the Itineraries tab, select the itinerary to view and click **Customize itinerary**. The group itinerary page appears.
4. Select the non-scheduled item and click **Resolve**. The Resolve conflict with item screen appears.

Resolve conflict with Lunch

Conflicts exist for: Brooks Dining Hall

Start time: 12/17/2009 11:30 AM

End time: 12/17/2009 12:30 PM

Location: Brooks Dining Hall

Resource	Quantity needed

Reso...	Qua...	Filled...	Job..	Job..	Desc...

Conflicts with

Name	Start date	End date	Start time	End time	Location	Supply/Equipment reso...	Staff resource
Schultz Class - Lunch	12/17/2009	12/17/2009	11:30 AM	12:30 PM	Brooks Dining Hall		

Check for conflicts Ignore conflicts when saving

- Under **Conflicts exist for**, the start time, end time, supplies/equipment resources, and staffing resources for the item you are trying to schedule appear. For custom items, the location appears also.
- Under **Conflicts with**, in the grid, the itinerary that caused the conflict appears.

Tip: If you have enough capacity for a location but marked the location as unavailable to other groups, you have to go to the itinerary causing the conflict to remove the restriction.

- Adjust the resources or location to remove the conflict.
- Click **Save**. If no other conflicts are found, the item schedules.

Save a Group Itinerary as a Track

If you discover that you schedule the same itinerary for multiple groups, it may be beneficial to save that itinerary as a track. Group tracks are like templates you build and use to efficiently schedule itineraries for group visits.

Tracks are especially helpful if your organization gets a large number of groups requesting the same type of visit or you want to develop specific curriculum-based visits. For example, your organization may put together a "Birds of Prey" or "When Dinosaurs Roamed" track that involves admission programs, scheduled events, and custom items that follow the specific theme.

Once you save an itinerary as a track, you can access it on the Tracks page to make changes. For more information, see [Build Group Itinerary Tracks on page 144](#). You can also load tracks to schedule itineraries. For more information see, [Load a Track for a Group Itinerary on page 204](#).

➤ Save a group itinerary as a track

1. From *Sales*, click **Group sales**. The Group Sales page appears.
2. On the calendar, select a reservation and on the action bar, click **Go to reservation**. The reservation record appears.
3. On the Itineraries tab, select the itinerary to save as a track and on the action bar, click **Save as track**.
4. On the Save as track screen, enter a name and description.
5. Click **Save**. The track is created and displayed. You can now edit the track as needed. For more information, see [Build Group Itinerary Tracks on page 144](#).

Edit Group Itineraries

Group itineraries are displayed on the Itineraries tab of a reservation record. If needed, you can edit the group itinerary to change the name of the itinerary, select a different group leader, or change the number of visitors who will attend. For information about editing the daily programs, program events, and custom items scheduled on a group itinerary, see [Schedule Group Itineraries on page 187](#).

➤ Edit a group itinerary

1. From *Sales*, click **Group sales**. The Group Sales page appears.
2. On the calendar, select the reservation for which to edit an itinerary and on the action bar, click **Go to reservation**. The reservation record appears.
3. On the Itineraries tab, click **Edit** for the itinerary to change. The Edit itinerary screen appears.
4. In the **Name** field, you can change the name for this itinerary as needed. For example, "Mrs. Smiths's 3rd Grade Class."
5. The **Leader** field displays the name of the patron associated with the reservation or another patron if one was previously selected. To select a different leader for this itinerary, click the magnifying glass to search for a different patron. For more information, see [Patron Search on page 17](#). If no record currently exists for the leader, you can add one from the Patron Search screen. For more information, see [Add Patrons on page 20](#).
6. In the **Group type** field, you can edit the group type designated for this group. When you select a group type, any requirements for the group are automatically added such as resources and flat rate pricing.
7. In the **Number of visitors** grid, you can edit the ticket price types and quantity of each price type to include in the group visit. These are the visitors who will attend and take part in the events scheduled for this itinerary. For example, you may have 10 adults and 40 students. The only price types available in the grid are those that are specifically allowed for the "Group Sales" sales method.
8. Under the **Number of visitors** grid, the capacity needed is based on the quantity you entered in the grid. The capacity available is how many visitors you can add based on the total number

of visitors for all group reservations on that day. If you need more visitors than the capacity available, you can select **Exceed capacity available** to override the constraints.

Tip: To resolve conflicts before you save, select **Check for conflicts**. You can also select to ignore conflicts, if any exist, and save the itinerary changes.

9. Click **Save**.

Delete Group Itineraries

Group itineraries are displayed on the Itineraries tab of a reservation record. If a specific group itinerary within a reservation is no longer needed, you can delete it. If needed, you can add itineraries to accommodate the group visit. For more information, see [Add Group Itineraries on page 187](#).

> Delete a group itinerary

1. From *Sales*, click **Group sales**. The Group Sales page appears.
2. On the calendar, select the reservation for which to delete an itinerary and on the action bar, click **Go to reservation**. The reservation record appears.
3. On the Itineraries tab, click **Delete** for the itinerary to remove. A confirmation screen appears.
4. To delete the itinerary, click **Yes**.

Configure Group Arrival Information

Once a group reservation is added, you can access the reservation record and select the Arrival Info tab to configure arrival information for the group. When you configure arrival information, you enter the anticipated arrival time. If applicable, you can also enter the number of buses a group will bring. Additionally, you can designate a specific arrival area for the group, which can be a specific parking lot, garage level, or entrance at your organization. If the group has specific transportation contact information, you can enter that as well.

> Edit arrival information for a group reservation

1. From *Sales*, click **Group sales**. The Group Sales page appears.
2. On the calendar, select the group reservation to configure and on the action bar, click **Go to reservation**. The group reservation record appears.
3. In the **Arrival** grid, click **Edit**. The Edit arrival screen appears.
4. Enter the arrival time for the group. If applicable, also enter the number of buses the group will bring.
5. In the **Arrival area** field, designate a specific arrival area for the group. This can be a parking lot, garage level, or entrance at your organization.
6. In the **Notes** field, enter any additional information that could be relevant to the group's arrival. For example, if one bus will arrive at a later time than the rest of the group, you can note that here.

7. Under **Transportation contact**, you can enter the name and phone number of the group's bus driver or other transportation contact. This information is not associated with a constituent record.
8. Click **Save**.

Manage Group Reservation Documentation

On the Documentation page of a group reservation record, you can add and manage notes, media links, attachments, and notifications to further define the group visit or facility rental. For example, you can add notes about special requests the group may have or save a link to the visiting organization's website. You can also attach files to the reservation. For example, if you create a contract for a group, it is added as an attachment and accessible on the Documentation page. When you attach a file, a copy of the file is stored in the database.

To access the Documentation page for a reservation, in the **Important notes** grid, click **Go to documentation**.

After you add documentation items to a reservation, they are displayed in the grid on the Documentation page. For each documentation item in the grid, you can view the date, type, title, and author. You can also view whether a notification exists based on the item. To view additional detail information such as the content of a note or a path to a media link or an attachment, select the item in the grid and click **Show Details** on the action bar. The Details window appears. From the Details window for a media link or an attachment, you can click the link in the **Media URL** or **File** field to open the item.

For specific information and procedures for each type of documentation item you can add to a group reservation, see the following:

Notes

On the Documentation tab, you can add notes to track helpful or interesting information about your records.

Add Notes

On the Documentation tab, you can track **notes**¹ about your records.

> Add a note

1. Go to the Documentation tab of a record.
2. Click **Add note**. The Add a note screen appears.
3. Select a note type. Enter the date, title, author, and the content of the note.
4. Click **Save**. You return to the Documentation tab.

¹Notes are helpful or interesting information you can add to your event records. You can track notes about your records on the Documentation tab.

Add a Note Screen

Screen Item Description

Screen Item	Description
Type	Select the type of note. The system administrator configures note types.
Date	Enter the date of the note.
Title	Enter the title, or purpose, of the note.
Author	To search for an author, click the magnifying glass. A search screen appears.
Notes	Enter the content of the note.

Edit Notes

On the Documentation tab, you can edit **notes**¹ as necessary.

> Edit a note

1. Go to the Documentation tab of a record.
2. Click the double arrows beside a note and click **Edit**. The Edit note screen appears.
3. Make changes as necessary to the note type, date, title, author, or note content.
4. Click **Save**. You return to the Documentation tab.

Delete Notes

After you add **notes**² to the Documentation tab, you can delete notes when necessary.

> Delete a note

1. Go to the Documentation tab of a record.
2. Click the double arrows beside a note and click **Delete**. A confirmation message appears.
3. Click **Yes**. You return to the Documentation tab, and the note no longer appears.

¹Notes are helpful or interesting information you can add to your event records. You can track notes about your records on the Documentation tab.

²Notes are helpful or interesting information you can add to your event records. You can track notes about your records on the Documentation tab.

Media Links

On the Documentation tab, you can save links to websites or related materials stored outside of the program.

Add Media Links

When you add a media link, you enter the website address.

> Add a media link

1. Go to the Documentation tab of a record.
2. Click **Add media link**. The Add a media link screen appears.
3. Select a media link type. Enter the date, title, and author. Enter the URL for a website.
4. Click **Save**. You return to the Documentation tab.

Add a Media Link Screen

Screen Item	Description
Type	Select the type of media link. The system administrator configures media link types.
Date	Enter the date of the media link.
Title	Enter the title, or purpose, of the link.
Author	To search for an author, click the binoculars. A search screen appears.
Media URL	Enter the URL for a website.

Edit Media Links

You can edit the URL for a website.

> Edit a media link

1. Go to the Documentation tab of a record.
2. Click the double arrows beside a media link and click **Edit**. The Edit media link screen appears.
3. Make changes as necessary to the media link type, date, title, or author. You can edit the URL for a website.
4. Click **Save**. You return to the Documentation tab.

Delete Media Links

After you add media links to the Documentation tab, you can delete them as necessary.

> Delete a media link

1. Go to the Documentation tab of a record.
2. Click the double arrows beside a media link and click **Delete**. A confirmation message appears.
3. Click **Yes**. You return to the Documentation tab, and the media link no longer appears.

Attachments

You can attach items to records. When you attach a file, the program stores a copy in the database.

Add Attachments

You can use attachments to track additional details about records. When you attach a file, the program stores a copy in the database.

> Add an attachment

1. Go to the Documentation tab of a record.
2. Click **Add attachment**. The Add an attachment screen appears.
3. Select an attachment type. Enter the date, title, and author. To search for the attachment, click **Choose file**.
4. Click **Save**. You return to the Documentation tab.

Add an Attachment Screen

Screen Item	Description
Type	Select the type of attachment. The system administrator configures attachment types.
Date	Enter the date of the attachment.
Title	Enter the title, or purpose, of the attachment.
Author	To search for the author, click the binoculars. A search screen appears.
File	To locate the attachment, click Choose file . To view an attachment, click Open file . To remove an attachment, click Clear file .

Edit Attachments

On the Documentation tab, you can edit an attachment. You can remove a file and choose a different file. You can also view an attachment.

> Edit an attachment

1. Go to the Documentation tab of a record.
2. Click the double arrows beside an attachment and click **Edit**. The Edit attachment screen appears.
3. Make changes as necessary to the attachment type, date, title, or author. To view an attachment, click **Open file**. To remove an attachment, click **Clear file**. To select a different file, click **Choose file**.
4. Click **Save**. You return to the Documentation tab.

Delete Attachments

After you add an attachment to the Documentation tab, you can delete it as necessary.

> Delete an attachment

1. Go to the Documentation tab of a record.
2. Click the double arrows beside an attachment and click **Delete**. A confirmation message appears.
3. Click **Yes**. You return to the Documentation tab, and the attachment no longer appears.

Open Attachment Files

After you add an attachment on the Documentation tab, you can open the attachment. To do this, click the double arrows beside the attachment and click **Open file**.

Notifications

Notifications allow you to emphasize and share important information about a group reservation with users who access the reservation record. For example, you can add a note to a reservation as a reminder to call the group contact and confirm the deposit due date. Once the note is added, you assign a notification to the note and determine whether all users should receive the notification or only a targeted group of users.

When a notification is configured on a reservation, the notification message appears at the top of the screen when the record is accessed. However, the notification appears only for those users selected to receive the notification.

You can also set notifications to appear on a separate screen when a record is accessed. The notification screen appears the first time a record is accessed during a session. If you leave the record and return within 60 minutes, the notification screen does not appear again. However, if you return after more than 60 minutes, the notification screen appears again.

Note: On the Documentation tab of a reservation record, you create a notification specifically for that record. However, if needed, you can add notifications to a group of records from Administration.

Add Notifications to Specific Records

On the Documentation tab, you can add a **notification**¹ to a note on a record. You can select or create a note with the notification's message and add the notification to the note.

> Add a notification

1. Go to the Documentation tab of a record.
2. Select a note to use for the notification. The note's title and text appear as the notification.

Note: You must add a note to the record before you can add a notification.

3. Click **Add notification**. The Add notification screen appears.

¹Notifications allow you to share important information about a record or a group of records with users. You can determine whether all users should receive a notification or only a targeted group of users. For example, you may want all users to receive a notification when they open the record of a board member.

Add notification [X]

End date: [Calendar icon]

Display in notification window

Display in Daily Sales

Notification users

Displays for: [Dropdown arrow]

Selection: [Search icon] [Edit icon]

[? Help] [Save] [Cancel]

4. Select how long to display the notification, whether to display it in a notification window, and the users who view the notification.
5. Select how long to display the notification, whether to display it in a notification window and in Daily Sales, and the users who view the notification.

Note: When you select **Display in Daily Sales**, we recommend you avoid smart queries and complex query criteria for notifications because it could cause a degradation in performance.

6. Click **Save**. You return to the Documentation tab.

Edit Notifications for Specific Records

After you add a **notification**¹ to a record, you can edit its properties on the Documentation tab. You can change how long to display the notification and who views it. To edit the notification's content, you edit the note associated with the notification.

> Edit a notification

1. Go to the Documentation tab of a record.
2. Click the double arrows beside the note with the notification and click **Edit notification**. The Edit notification screen appears.
3. Make changes as necessary to the notification, such as how long to display it and who views it.

Note: To edit the notification title or content, edit the note itself.

4. Click **Save**. You return to the Documentation tab.

Delete Notifications from Specific Records

On the Documentation tab, you can delete a **notification**² when you no longer need it.

Note: For a constituent record, go to the Documentation and Interactions tab. Then click **Documentation**.

To remove a notification from a record, click the double arrows beside the note with the notification to remove and click **Delete notification**.

Manage Group Sales Discounts and Promotions

You can configure and apply multiple types of discounts for group sales orders. These include standard discounts, required purchase discounts, and quantity discounts. Each discount can be configured to be automatically applied, manually applied, or applied when a promotion code is entered. Discounts are added to the system from the Discounts and Promotions page in *Tickets* and are typically set up by a user who is assigned the Group Sales Coordinator system role. For more information, see the *Tickets Guide*.

¹Notifications allow you to share important information about a record or a group of records with users. You can determine whether all users should receive a notification or only a targeted group of users. For example, you may want all users to receive a notification when they open the record of a board member.

²Notifications allow you to share important information about a record or a group of records with users. You can determine whether all users should receive a notification or only a targeted group of users. For example, you may want all users to receive a notification when they open the record of a board member.

Once discounts are configured and active for transactions processed through the “group sales” sales method, they can be applied to group sales orders. Automatic discounts are calculated and applied to eligible group orders as items and itineraries are added to reservations. Discounts are recalculated each time new itineraries are added or the number of attendees changes. They are also recalculated if daily admissions or scheduled events are added or removed from reservations. The best discount for the patron is always used. Additionally, you can manually apply a discount to a reservation.

After discounts and promotions are applied during the group sales process, you can view all automatic, manual, and promotion code discounts, including those that applicable but were not selected for use by the system. Additionally, you can remove any manual or promotion code discounts that have been applied to the order.

Note: Group reservations that use the flat rate pricing structure are not eligible for additional discounts and promotions.

Apply Group Sales Discounts and Promotions

During the group sales process you can manually apply discounts and promotions to reduce the price of a group reservation. Automatic discounts are calculated and applied to eligible group orders as items and itineraries are added to reservations. To apply a manual discount, you select one from a pre-configured discount list, enter a valid promo code, or enter a custom adjustable discount.

Note: Discounts are recalculated each time new itineraries are added or the number of attendees changes. They are also recalculated if daily admissions or scheduled events are added or removed from reservations.

A manual discount can be applied as the only discount on a purchase or it can be applied along with multiple discounts. For example, a patron books a group visit to the Sea Turtles lecture, and presents a AAA membership card to receive a discount that takes \$1 off of each ticket. Along with the manual AAA membership card discount, another discount has already been configured to automatically reduce all group sales orders placed during the month of July by 10%. After both discounts are calculated, each ticket would receive the \$1 AAA membership card discount and an additional 10% would be taken from the total price of the purchase.

If a valid promotion code is presented, you can enter the code to apply a discount. Additionally, you can enter a custom adjustable discount that provides a specific amount or percentage off the order. Like other discounts, promotion code and custom adjustable discounts can be applied as the only discount on a purchase or applied along with other discounts.

➤ Apply a group sales discount or promotion

1. From a group sales reservation, under **Discounts**, click **Apply discount**. The Discounts and promotions screen appears.
2. In the **Discounts** field, you can select a pre-configured discount to apply to the order. You can also select “Enter promotion code” or “Enter adjustable discount.”
3. If you selected “Enter promotion code,” enter the code in the corresponding field.
4. Select whether the discount should be applied to all valid tickets, or if it should be limited. If the discount should be limited, select that option and enter the number of times the discount should be applied.

5. If you selected "Enter adjustable discount," the **Calculation type**, **Value**, and **Reason** fields become active. You must specify whether the adjustable discount should be applied as amount or percent off of the purchase, enter the value of the discount as either a dollar amount or percent, and select a reason as to why the adjustable discount is applied.
6. Click **Save**. You return to the reservation record. The new price reflecting the discount is clearly displayed in the **Pricing** section. To view details of the discounts applied to the order, access the Order Details tab and review the **Other Adjustments** section.

Note: If you entered an invalid code, or typed the code incorrectly, an error message appears that says, "Promotion code not found." If you entered an inactive or expired code, or a code that is not currently valid based off of availability parameters set for it, an error message appears that says, "Promotion not currently available." Click **OK** to return to the Discounts and promotions screen and re-enter the code.

View All Discounts and Promotions Applied to a Reservation

After you apply discounts and promotions during the group sales process, you may want to see a separate view of those discounts and promotions to verify what has been applied to the order. For example, a patron may request a rundown of the discounts applied to the order. To view all of the discounts and promotions you have applied, from the reservation record, under **Discounts**, click **Manage discounts**. The Manage discounts and promotions screen appears. In the grid you can view all discounts and promotions that have been applied, as well as the description of each discount and promotion, and the promotion code that was used if applicable.

Remove Discounts and Promotions from a Reservation

After you apply discounts or promotions during the sales process, you can remove automatic, manual, or promotion code discounts if necessary. If you remove a discount or promotion from an order that has already been selected for use by the system, the discount or promotion with the next highest value will automatically be selected for use.

> Remove discounts from a reservation

1. From a group sales reservation, under **Discounts**, click **Manage discounts**. The Manage discounts and promotions screen appears.
2. In the grid, select the discount or promotion to remove and click **Remove discount** at the top of the grid. The discount or promotion is removed from the grid.
3. Click **Save**. You return to the order page. After you remove a discount or promotion from the order, the price of each item in the order recalculates if necessary, as well as the price of the entire order. The new price of the order is clearly displayed in the **Pricing** section of the reservation record.

Process Group Payments

When you add itineraries to a group reservation, you enter the number of people attending and select the appropriate price types. You also define each itinerary by adding the daily admission programs, scheduled events, and custom items the group will attend. After you configure the attendees, select price types, and build the itinerary of things the group will do, a total price is calculated and displayed on the group reservation under **Pricing**.

After itineraries are added and a price is calculated, you can add payments to the group order on the Payments tab. Any payment added to the order is applied to the deposit until the deposit is met. All other payments received after the deposit is met are applied to the order balance. You can also add payments for the group's security deposit if one is required.

When you satisfy a requirement for an order, a green checkmark appears beside the requirement on both the Due Dates tab and in the order summary under **Due Dates**. For example, if the deposit has been met, contract received, and balance paid, a green checkmark appears beside the deposit, contract, and order balance sections along with the date completed.

As the requirements are completed, the status of the group order changes from pending to tentative to confirmed to finalized. You can also manually change the status of the order. For information about how to manually change the status, see [Change Group Reservation Status on page 176](#).

Note: If the reservation pricing structure is "Flat rate," the entire flat rate amount that the group is charged for tickets must be fully applied and allocated. If 100% of the flat rate is not applied, a group cannot make payments on the reservation and they cannot check in. For more information about applications, see [Configure Flat Rate Applications on page 182](#).

Warning: Before you can complete the payment process, an administrator must map the program and payment method, as well as any fees, taxes, or discounts included in the order to accounts in the General Ledger so the revenue can be distributed properly. For information about how to map revenue to the General Ledger, see the *Revenue Guide*.

➤ Add a payment

1. From *Sales*, click **Group sales**. The Group Sales page appears.
2. On the calendar, select the group reservation to add a payment to and on the action bar, click **Go to reservation**. The group reservation record appears.
3. In the **Payments** grid, click **Add**, then select **Add payment** if the payment should be applied to the reservation deposit, and select **Add security deposit payment** if the payment should be applied to the group's security deposit. The Add a payment screen appears.

Add a payment

Balance: \$60.80

Amount:


Payment information

Payment method: ▼

Card type: ▼

Name on card:


Card number:

Expires on: 

Process card on save

CSC:

Authorization code:



4. In the **Amount** field, enter the amount of the transaction if different from the order balance.
5. In the **Payment method** field, select how the patron will pay for the order.
 - If you select "Cash," enter the payment amount.
 - If you select "Check," enter the check date and check number.

- If you select "Credit card," select the card type and enter the cardholder name, card number, and expiration date.

If required, enter the credit card security code (CSC) in the **CSC** field. For Mastercard, Visa, and Discover cards, the security code is the last three-digits in the signature field on the back of the card. For American Express cards, it is the four-digit code above the account number on the front of the card.

Note: If there is an issue with the payment gateway, you must process the card manually. When you process the card manually, it is processed through an outside vendor. After you process the card, enter the authorization code. You can then save the payment information.

- If you select "Other," the **Other Method** field appears. In this field, select the form of payment to use, for example, "Gift certificate."

Note: The payment methods available for group sales are configured by an administrator and can be different for each sales method. For more information about how to manage payment methods, see the Configuration Tasks chapter of the *Tickets Guide*.

6. Click **Save**. The group sales order page appears.

➤ Delete a payment

You can delete non-posted payments on a group reservation record. However, you cannot delete posted payments or payments for group sales orders with a status of "Complete".

1. From *Sales*, click **Group sales**. The Group Sales page appears.
2. On the calendar, select the group reservation to add a payment to and on the action bar, click **Go to reservation**. The group reservation record appears.
3. On the Payments tab, select the non-posted payment to delete and click **Delete**.
4. On the confirmation message, click **Yes** to delete the payment.

Print or Reprint Group Reservation Sales Documents

After a credit card payment is processed for a group reservation, you can view the Sales Documents on the reservation record to print or reprint credit card receipts. When a credit card payment is processed, a receipt will either print immediately or is deferred and must be printed manually.

Note: The delivery method selected for an order determines whether sales documents print immediately or are deferred. Each individual delivery method your organization uses can be configured to print sales documents immediately or to defer printing. For information about how to configure delivery methods, see the *Tickets Guide*.

To manually print or reprint sales documents for a group reservation, you access the reservation record, access the Sale Documents page, and click **Print**. You can then select the specific sales documents you want to print or reprint.

➤ Print or reprint group reservation sales documents

1. Open the reservation record for which to print or reprint sales documents. For information about how to find a reservation record, see [Search for Reservations on page 164](#).
2. Under **Tasks**, click **Go to Sales documents**. The Sales Documents page appears.
3. On the action bar, click **Print**. The Print sales documents screen appears. All printable sales documents are listed. For a group sales reservations, only credit card receipts will be displayed on this tab.

Note: Document types that are not configured with a valid sales document template cannot be printed and are not listed on the Print sales documents screen.

4. In the grid, select the checkbox for each sales document to print or reprint.

Tip: To quickly select every sales document, click **Check all**. You can also click **Check none** to quickly deselect every selected document. To select multiple tickets at once, hold **CTRL** on the keyboard and select each individual document, then click **Check selected**.

5. Click **Print**. The selected sales documents print and you return to Sales Documents page, which displays a history of the documents that have been printed and reprinted for this reservation.

Refunds for Group Sales Reservations

From the Group Sales Reservation page, you can add refunds to return money to your customers. You can refund the full payment until the reservation is checked-in, after check-in, you can only refund the overpaid amounts on reservations. For example, if a reservation has a balance of \$150 and a patron makes two \$100 payments, you can only refund the over paid amount of \$50.

Note: In the **Pricing** section of the Group Sales Reservation page, a **Refund** link appears if an overpayment is available for refund. However, before check-in you can refund anytime under the **Refunds** section.

➤ Add refunds for group sales reservation

1. From *Sales*, under **Daily tasks**, click **Group Sales**. The Group Sales page appears.
2. Select a reservation to refund. The Group Sales Reservation page appears.
3. In the **Refunds** section, click **Add**. The Refund Order screen appears.

Refund Order #10000289 Abc Learning Center [X]

Balance: \$210.00

Amount:

Refund information

Payment: ▼

You can only refund up to **\$56.00** of this payment.

Refund method: ▼

Reason:

Click 'Complete refund' to refund the amount to the selected refund method.

Help

4. The **Balance** field displays the amount the patron still owns.
5. In the **Amount** field, enter the amount to refund.
6. In the **Payment** field, select the payment to refund. If a payment has already been refunded, the amount that you can refund appears under the drop-down.
7. In the **Refund method** field, select how to refund the money. The refund methods for your organization appear in the drop-down.
8. In the **Reason** field, select the reason for the refund. This information appears in the **Refund** section on the Group Sales Reservation page.
9. Click **Complete refund**. You return to the Group Sales Reservation page.

Process Group Check In

The final phase of a group reservation is the check in process. This occurs when the group arrives at your organization to begin their visit or facility rental. After a group is checked in, their order status changes to "Complete."

During check in, you can update the number of visitors included in the group and add new price types if needed. When you adjust the number of visitors for a group or edit price types, you can choose to keep the original order balance or you can update the balance to reflect any differences in cost. You can also view resources for the order, check for conflicts, and make any necessary changes. If a balance is due, you can access the reservation record and process the final payment. Additionally, you can print copies of the group's itinerary and give them to the group so they have a schedule for the day.

You can check groups in by accessing the individual reservation record or from the Group check in page accessed from *Sales*. The Group check in page provides a central location that ticket sellers and group sales coordinators can access and use to check in groups. Typically, only group sales coordinators will check in groups from the individual reservation record.

View the Groups Scheduled to Check In

From *Sales*, click **Group check in**. The Group check in page appears for the current day. All groups scheduled to arrive on this day are listed in the grid. By default, when you access the Group check in page, the groups scheduled to arrive on the current day are displayed.

You can use the filters to display the groups that are scheduled to arrive during the next seven days or you can view all upcoming group arrivals. Additionally, can also view groups scheduled for a specific date or date range.

Tip: If you have the required system role, you can also view the group reservation calendar to see the upcoming groups scheduled to visit your organization. For more information see, [View the Group Reservation Calendar on page 154](#).

View and Print Group Itinerary Reports

The Itinerary Report provides a printable schedule you can give to groups when they arrive at your organization and check in. This document provides a list of each program and custom item that the group is scheduled to attend during their visit or facility rental, along with the times and locations for each.

From the Group check in page, you can view and print itinerary reports for any group currently scheduled to visit. To view the itinerary report, select a group in the **Reservations** grid and click **View itinerary**. To print the Itinerary Report, click **Print** on the toolbar.

Tip: You can also view and print the Itinerary Report from each individual group reservation record. From the reservation record, under **Reports**, click **Itinerary report**.

By default, the report includes all itineraries for the selected group reservation. To view only a specific itinerary, select it in the **Itinerary** field. To include any resources in the report that are booked for the group, select **Include resources**. To apply the filters and view the updated report, click **View Report**.

If needed, you can also view itinerary reports for other group reservations. To search for another group reservation, in the **Reservation** field, click the binoculars.

Check In Groups

When a group arrives at your organization on the day of their visit or facility rental, they must be checked in. During this process, you verify the number of visitors in the group and update the reservation to reflect the actual attendees. You may need to add or remove visitors from the reservation and possibly add new price types.

When you adjust the number of visitors for a group during check-in or edit price types, you can choose to keep the original order balance or you can update the balance to reflect any differences in

cost. This is commonly used to accurately track the number of people that attend a group visit while maintaining the original agreed upon price. For example, if a group of 50 is booked to attend and only 48 show up, you can adjust the number of attendees so the count is accurate while leaving the agreed upon reservation cost intact.

Additionally, you can view the resources booked for the order and make sure they are adequate for the group. If needed, make adjustments to the resources and check for conflicts. If a balance is due on the reservation, you can process the final payment and make any other changes that are needed on the reservation.

Depending on your system role, you can check in groups on the arrival date directly from the reservation record or any time from the Group check in page accessed from *Sales*. Typically, ticket sellers will not have access to the group reservation record and must process group check in from the Group check in page. Group sales coordinators can check in groups from the reservation record or from the Group check in page.

➤ Check in a group from the reservation record

1. From *Sales*, click **Group sales**. The Group Sales page appears.
2. On the calendar, select a reservation and on the action bar, click **Go to reservation**. The reservation record appears.

Note: You can check in a group from the reservation record only on the group's arrival date. If you access a group reservation on any date other than the arrival date, the **Check in group** task does not appear. To check in a group after their arrival date, you must use the Group check in page.

3. Before you check the group in, review the reservation and itinerary and make sure it is correct. For example, confirm the final count with the group representative and adjust the number of visitors if needed. Also, review the resources booked for the order and make sure they meet the needs of the group. If a balance is due, you can process the final payment. Once you verify that the reservation is correct, you can proceed with the check in process.

Tip: For more information updating group reservations, see [Manage Group Reservations on page 154](#). For more information about updating group itineraries, see [Edit Group Itineraries on page 214](#).

4. Under **Tasks**, click **Check in group**. A Check in screen appears.

Check in Abrahms

Update Visitors | Additional Types

Total visitors: 32

Type	Name	Quantity
Teacher	Douglas Abrahms	4
Student	Douglas Abrahms	28

Update order balance based on new number of visitors/resources
 Ignore conflicts when checking in

Total will be recalculated at check in

Pay remaining balance when I click "Check in"

[? Help](#)
[Check in](#)
[Cancel](#)

- To update the number of visitors in the group, click the number in the **Quantity** column of the **Total visitors** grid, and enter the new number of visitors.
- Select the Additional Types tab to add more visitors of a different type.

Check in Abrahms

Update Visitors | Additional Types

Itinerary: Douglas Abrahms

Type: Quantity: [+ Add](#)

Type	Itinerary	Quantity
Teacher	Douglas Abrahms	4
Student	Douglas Abrahms	28
Chaperone	Douglas Abrahms	2

Update order balance based on new number of visitors/resources
 Ignore conflicts when checking in

Total will be recalculated at check in

Pay remaining balance when I click "Check in"

[? Help](#)
[Check in](#)
[Cancel](#)

7. In the **Type** grid, select the type of visitor to add to the reservation.
8. In the **Quantity** grid, enter the number of visitors.
9. Click **Add**. The new visitor type and quantity is added to the grid.
10. Select the **Update order balance based on new number of visitors/resources** checkbox to increase or decrease the order balance after you update the number of visitors.
11. Select the **Pay remaining balance when I click "Check in"** checkbox to automatically add a payment for the remaining balance if the updated number of visitors increased the group balance.
12. Select the **Ignore conflicts when checking in** checkbox if you do not want to check for conflicts upon group check in.
13. Click **Check in**. A confirmation message appears.
14. Click **Yes**. The group is checked in and the completed order page appears. The order status is now set to "Complete."

Tip: From the completed order page, under **Reports**, click **Itinerary report** to view and print copies of the group's itineraries. You can give these to the group so they have schedules for the day's activities.

Process Group Check Out

It is common for a security deposit to be required for group visits or facility rentals. If a security deposit is collected from a group when they visit your organization, to fully check them out afterward, you must refund or withhold the security deposit. For example, if a group visits your organization, and leaves without incident, you will refund their security deposit in full. If the group were to have damaged property while at your organization, you may choose to withhold the security deposit as a penalty. You process security deposits from the Group Check Out page.

From the Group Check Out page, you can also view individual reservation records if necessary. To view an individual reservation, select the reservation in the **Reservations** grid, and click **Go to reservation**. The group's reservation record appears.

View the Groups Scheduled to Check Out

From **Sales**, click **Group check out**. The Group Check Out page appears for the current day. All groups that have security deposits that have not been refunded or withheld on this day are listed in the grid.

You can use the filters to display the groups that have security deposits that have not been refunded or withheld for the last seven days or you can view all upcoming groups. Additionally, can also view groups scheduled for a specific date or date range.

Note: You can also view groups with security deposits that have already been refunded if necessary. To display groups with security deposits that have already been refunded or withheld, select **Include checked out groups** and click **Apply**.

Refund Security Deposits

If a security deposit was collected from a group when they visit your organization, to fully check them out afterward, you must refund or withhold the security deposit. For example, if a group visits your organization, and leaves without incident, you will refund their security deposit in full. If the group were to have damaged property while at your organization, you may choose to withhold the security deposit as a penalty.

➤ Refund a group security deposit

1. From *Sales*, click **Group check out**. The Group Check Out page appears.
2. Under **Reservations**, select the row of the group you want to refund a security deposit and click **Refund security deposit**. The Refund security deposit screen appears.

Refund security deposit

Amount charged: \$0.00
Amount paid: \$50.00
Amount eligible: \$50.00

Withhold security deposit

Reason:

Amount:

Refund amount: \$50.00

Refund method:

Comment:

Refund date:

3. If part of the security deposit, or all of it, should be withheld, select **Withhold security deposit**. The **Reason** and **Amount** fields become active.

Note: If the full amount of the security deposit should be refunded, the **Reason** and **Amount** fields remain inactive.

4. Select a reason as to why the security deposit should be withheld.
5. Enter the amount of the security deposit that should be withheld.
6. In the **Refund method** field, select how the security deposit should be refunded.

7. In the **Comment** field, you can enter any additional information about the security deposit if necessary.
8. The **Refund date** field displays today's date and is disabled.

Note: When the security deposit refund is included in a deposit with a deposit post date that is different than the security deposit refund date, the security deposit refund's date and post date are updated to match the deposit's post date.

9. Click **Save**. You return to the Group Check Out page and the security deposit is removed from the grid.

Note: If a security deposit was withheld or partially withheld, and you later decide to fully refund the group's security deposit, you can access the Group Check Out page and refund the deposit for the group that has already been check out. To view all groups that have already been checked out, select **Include checked out groups** and click **Apply**.

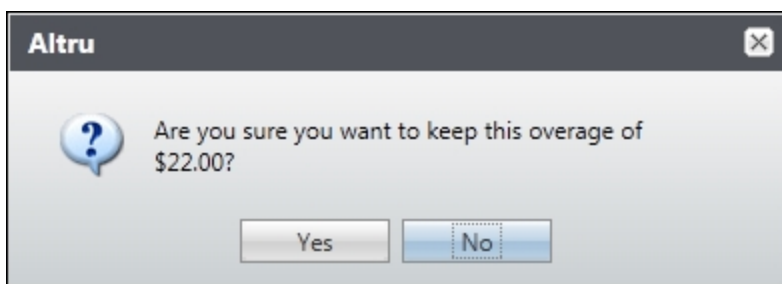
Keep Overage for Group Reservations

From a group sales reservation, you can decide to keep the overpaid amount on a reservation that has an overpayment. For example, if the balance of a reservation is \$100 and the patron paid with a check written for \$150, an option to keep the overage of \$50 is available.

Note: You can only keep the overage of a reservation that is checked-in.

➤ Add refunds for group sales reservation

1. From *Sales*, under **Daily tasks**, click **Group Sales**. The Group Sales page appears.
2. Select a reservation to keep an overage. The Group Sales Reservation page appears.
3. In the **Pricing** section, click **Keep overage**. The confirmation screen appears.



4. Verify the information and click **Yes**, to keep the overage.

Manage Orders

Search for Orders	240
Order Search Screen	241
Patron View	243
View Sales Orders for a Constituent	243
View Completed Orders	243
Change Patron on Order	244
View Order Details	244
View Tickets Purchased	245
View Printed or Emailed Sales Documents	245
View Order Payments	245
View Order Documentation	245
View GL Distributions	245
Adjust Revenue GL Distribution Screen	246
Manage Completed Order Documentation	247
Notes	248
Add Notes	248
Add a Note Screen	248
Edit Notes	248
Delete Notes	249
Media Links	249
Add Media Links	249
Add a Media Link Screen	249
Edit Media Links	250
Delete Media Links	250
Attachments	250
Add Attachments	250
Add an Attachment Screen	251
Edit Attachments	251
Delete Attachments	251

Print Orders, Tickets, and Sales Documents	252
Print or Reprint Orders	252
Print or Reprint Tickets	253
Print or Reprint Sales Documents	254
Common Print Issues	254
Pick Up Tickets	255
Complete Unpaid Orders and Print Tickets and Sales Documents	256
Print Tickets and Sales Documents for Paid Orders	256
Group Check In	257
Preregistered Program Check In	260
Manage Registrants for Preregistered Programs	261
Edit Registrants and Preferences	261
View and Print a Preregistered Event Roster	262
Mark Registrants as Canceled	263
Mark Registrants as Attended or Not Attended	263
Unresolved Online Sales Orders	264
Pending Orders	265
Scan Tickets	265
Scan Tickets from Sales	266
Scan Tickets from Daily Sales Page	266
Batch Print Tickets	267
View Printed Ticket Batches	268
Reschedule Tickets	269
Find Tickets Available to Reschedule	269
Find Available Events	270
Email Receipts for Sales Orders	270
Email Tickets	271
Resend Acknowledgment Emails	272

From *Sales*, you can perform a number of tasks to manage orders. You can use the order search to efficiently search for and view completed orders. You can also process refunds, as well as search for and view refunds that have already been processed. Additionally, you can complete “pay on arrival” orders and print tickets that have not yet been printed when patrons arrive. If your organization books group sales, you can also check in groups who arrive at your organization on the day of a scheduled visit.

Search for Orders

If a patron has questions about an order, you can search for and access the completed order record to view transaction details. These details include a list of all items purchased or refunded, all payments received or refunded, the order and post statuses, as well as any balance that is due on the order. For more information about the completed order record, see [View Completed Orders on page 243](#).

To efficiently search for and locate completed orders, you access *Sales* and click **Order Search**. You then enter criteria on the Order Search screen to help you locate the correct order. For example, you can enter the patron's name, the recipient's name, and the name of the user who processed the order. To search for a specific order, you can enter the full order number.

Note: You can replace parts of a search phrase with wildcard characters if you do not know the exact spelling or to save time. Use the asterisk (*) or percent sign (%) to represent a group of characters and the question mark (?) or underscore (_) to represent an individual character. For example, to locate all patrons with a last name ending with the letters "son," enter "*son" or "%son" in the name field. For the last name Smith or Smyth, enter "Sm?th" or "Sm_th."

You can also search by the patron's membership ID, the program name, or sales method. If you want to include orders placed during a certain period of time, you can search by a specific date or date range. You can also search for orders from today, yesterday, this week, this month or all dates. For information about each item on this screen, see [Order Search Screen on page 241](#).

If a patron has their ticket handy, you can enter the ticket barcode ID on the Order Search screen to search for the related sales order. If applicable, you can also scan the ticket's barcode to search by barcode ID.

Tip: You can limit the order search to refunds only by selecting **Only search refunds**. If you want to search for unpaid orders, select **Only search unpaid orders**. This is helpful in locating "pay on arrival" orders, as well as other orders that have a balance due.

> Search for an order

1. From *Sales*, click **Order search**. The Order Search screen appears.

Tip: To quickly locate the last order completed, leave all criteria fields blank and click **Search**. The first result listed will be the last order completed.

2. Enter criteria to help you locate the order. For example, you can enter the patron's name, the recipient's name, or the name of the user who processed the order. When you enter name information on which to base your search, you can enter a partial name or individual letters. For example, if you enter "Sm", all names beginning with the letters "Sm" appear. Also, the search process is not case-sensitive, so you can enter "Smith," "smith," or "SMITH" and get the same results.

Note: When you search for orders associated with a patron, the way you enter the name affects the search results. If you enter a full name in the **Patron name** field, the search results include patrons with this first name and last name. If you enter a single name, the program searches for only last names that match.

- To search for a specific order, you can enter the full order number. You can also search by the patron's membership ID, the program name, sales method, or ticket barcode ID. If you want to search only orders placed during a certain period of time, you can limit the search results to a specific date or date range. For information about each item on this screen, see [Order Search Screen on page 241](#).

Note: In the criteria fields, you can enter "wildcard" characters to take the place of parts of the search phrase. Use the asterisk (*) or percent sign (%) to take the place of a group of characters and the question mark (?) or underscore (_) to take the place of an individual character. For example, to locate all refunds for patrons with a last name ending with the letters "son", you can enter "*son" or "%son" in the name field, or for the last name Smith or Smyth, you can enter "Sm?th" or "Sm_th."

- After you enter criteria to help locate the order, click **Search**. The **Results** grid displays orders that meet the criteria you entered. If multiple orders meet your search criteria, you can use the information in the **Items** column to locate the correct order record. This column displays the first ten items included in the order.
- Select the order to view and click **Select**. The complete order appears. For more information about the completed order record, see [View Completed Orders on page 243](#).

Order Search Screen

The table below explains the items on the Order Search screen. For information about how to access this screen, see [Search for Orders on page 240](#).

Screen Item	Description
Patron name and Recipient name	<p>Uses these fields to search for an order based on the patron who made the purchase or the recipient of the purchase. Enter name information on which to base your search. You can enter a partial name or individual letters in this field. For example, if you enter "Sm", all names beginning with the letters "Sm" appear. Also, the search process is not case-sensitive, so you can enter Smith, smith, and SMITH and get the same results.</p> <p>When you search for orders associated with a patron, the way you enter the name affects the search results. If you enter a full name in the Patron name field, the search results include patrons with this first and last name. If you enter a single name, the program searches for only last names that match.</p>
Membership ID	<p>Enter the entire or partial membership ID you are searching for. You can enter the entire ID or the beginning digits. For example, if you enter "1", all membership IDs beginning with the number 1 appear. If you enter "123", IDs beginning with these digits appear.</p>
Program name	<p>Search by the program for which tickets were purchased.</p>

Screen Item	Description
Receipt email	Search by the email address used to send the receipt at the time of sale. NOTE: Searching by email does not include online sales orders.
Order number	Enter the full order number to search for a specific order.
User name	Enter the name of the user who processed the order.
Sales method	Select the sales method used when the order was processed.
Ticket barcode ID	Enter the barcode ID displayed on a ticket to pull up the related sales order.
Match all criteria exactly	<p>If a search must match your criteria exactly, mark this checkbox. An entry in a field returns only an exact match of the characters you enter. You can enter both a first and last name or a full or partial last name.</p> <p>When you mark this checkbox, wildcard characters do not work and are instead used as regular characters. For example, an asterisk (*) or percent sign (%) is used literally, rather than as a replacement for a group of characters. Similarly, a question mark (?) or underscore (_) is no longer used as a replacement for one character.</p>
Only search refunds	To search only orders that have a refund, select this checkbox.
Only search unpaid orders	To search only orders that are unpaid, select this checkbox. This is helpful in locating "pay on arrival" orders, as well as other orders that have a balance due.
Include aliases	To include an alias in your search, select this checkbox. Aliases appear on the Names tab of the patron's constituent record.
Include nicknames	<p>To include a nickname in your search, mark this checkbox. For example, to search for Robert Hernandez by his nickname, mark the checkbox. You can now enter "Bob" in the First name field when searching for him.</p> <p>For an individual, the nickname appears on the Personal tab of the patron's constituent record.</p>
Dates	Select an option in this field to search for orders by date they were completed. You can search by a specific date or date range. You can also search for orders from today, yesterday, this week, this month or all dates.
Search (button)	After you enter criteria, to activate the search, click the button.

Screen Item	Description
Clear (button)	To remove your criteria and begin a new search, click the button.
Results (grid)	The search results appear in this grid. If multiple orders meet your search criteria, you can use the information in the Items column to locate the correct order record. This column displays the first ten items included in the order.
Select (button)	In the Results grid, select an order and click the button.

Patron View

After a constituent purchases a ticket to a program, a constituency of “Patron” is added to their constituent record. After a constituent is a patron, you can access a “Patron” view of the constituent to see all their sales orders, reservations, and refunds. This view also displays biographical information for the constituent, like their address, other active constituencies, and status.

To view the constituent as a patron, access their constituent record and click **Patron** listed under **Active constituencies** at the top of the screen. The patron view is displayed.

For more information about constituent views, see the *Constituents Guide*.

View Sales Orders for a Constituent

If needed, you can view all sales orders, reservations, and refunds for a specific constituent. To do so, access a constituent record and on the **Tasks** menu, under **More information**, click **Sales orders**.

The Sales Orders page displays completed, canceled, and in-progress sales order transactions for the constituent. Sales order transactions are those processed through *Sales* and can include purchases made through advance sales, daily sales, and online, as well as reservations and facility rentals booked through group sales. If applicable, refunds are also displayed on this page.

Additionally, the Sales Orders page displays biographical information for the constituent, like their address, active constituencies, and status.

Tip: You can also view the Sales Orders page for a constituent by accessing their “Patron” view. To view the constituent as a patron, access their constituent record and click **Patron** listed under **Active constituencies** at the top of the screen. The patron view is displayed.

For more information about constituent views, see the *Constituents Guide*.

View Completed Orders

After an order is completed, a “completed order” record is added to the system. To view a specific completed order, you can use the Order Search screen. For information about how to search for an

order see [Search for Orders on page 240](#). Additionally, in various places throughout the application, you can click a **Go to order** link to access the corresponding order record.

Each record provides vital transaction information and specific order details. These details include an order summary that displays the total order amount, the amount paid, and any remaining balance. The delivery method for the order is also displayed along with the order status, order date, post status, and post date. Additionally, if a patron is associated with the order, their name, address, contact information, and constituencies are displayed. You can also view the user who processed the order and the sales method used.

Note: For a posted order, the **Post process** field displays the ID of the Post to GL process originally used to post the transaction to the general ledger. To view a list of all transactions posted to the general ledger through this process, click the ID in this field. The Post to GL – Included Transactions report for the post process appears.

In addition to the transaction information displayed at the top of the completed order record, there are a number of tabs you can access to view additional order details, including the specific tickets and items purchased. You can also print or reprint tickets or sales documents and add or void payments. If needed, you can also add documentation to the order like notes, links, or attachments, and view the GL distributions generated by the order.

Tip: From the **Tasks** menu on a completed order record, you can create a new order, search for existing orders, print tickets and sales documents for the current completed order, or refund the current completed order.

Change Patron on Order

If a patron associated with an order is incorrect, you can change the patron from the Completed Order page. When you associate the correct patron with the order, the patron is also associated with any payments and revenue with the order. For example, any payment or revenue records, recognition credits, donations, etc. are associated with the correct patron.

Note: If you change the name of the patron on a order, it does not change the name of the patron on items such as event registrations and memberships. This is because registrations and memberships can be gifted.

➤ Change patron on order

1. From *Sales*, click Order search to search for a completed order.
2. After you select the completed order to adjust, the Completed Order page appears.
3. Under **Tasks**, click **Change patron on order**. The Change patron on order screen appears.
4. Search and select the correct patron and click **Save**. You return the Completed Order page.

View Order Details

The Order Details tab displays details about the order such as tickets, memberships, donations, refunds, facility rentals, and any fees, discounts, or taxes that apply to items in the order.

To view a membership, from the Order Details tab, on the membership you want to view, click **Go to membership**. The Membership page appears. Also, to print a membership card, from the Order Details tab, select the membership and click **Print Membership Cards**.

For information about how to print membership cards see the *Membership Guide*.

View Tickets Purchased

The Tickets tab displays all tickets purchased on an order. You can view the number of times a ticket is printed, the barcode ID for each ticket, and the scanned date of a ticket. You can also view the print history of a ticket, which includes a reason for the reprint of a ticket. If a ticket purchased was for an event, the event date and time is displayed for the event. For information about how to print tickets see [Print or Reprint Tickets on page 253](#).

View Printed or Emailed Sales Documents

The Sales Documents tab displays when sales documents were printed for an order and who printed them. For itemized receipts, this tab also includes when a receipt was emailed and who sent it. For information about how to print sales documents see [Print or Reprint Sales Documents on page 254](#). For more information about how to email an itemized receipt, see [Email Receipts for Sales Orders on page 270](#).

View Order Payments

If you have the proper security rights and if there are payments on the order the Payments tab is available to view all payments made on the order. Typically, if there are no payments on a completed order, it is because the items on the order were complimentary. For example, you received two tickets free because of your membership status. The Payments tab displays the date, payment method, amount, and any additional details about each payment on the order. For information about how to print sales documents see [Correct Completed Order Payments on page 1](#).

View Order Documentation

The Documentation tab displays any notes, media links, or attachments created for the order. You can view, information such as when the documentation was created and the author. For information about how to print sales documents see [Manage Completed Order Documentation on page 247](#).

View GL Distributions

From the GL Distributions tab, you can view information about how the order revenue is or will be distributed in the General Ledger. An administrator maps each revenue type for an order, including fees, discounts, and taxes from the GL Mapping tab of the corresponding revenue record. If you have security rights, you can edit the distributions that appear on the GL Distributions tab of the revenue transaction record.

You cannot edit the Discount GL distribution.

➤ Edit general ledger distribution information for revenue

1. On the Completed Order page, select the GL Distributions tab.
2. Click **Edit distribution** or **Edit posted distribution**. The Edit GL distribution screen appears or the Adjust revenue GL distribution screen appears. For information about the items on these screens, see [Adjust Revenue GL Distribution Screen on page 246](#).
3. Edit the general ledger distribution information as necessary.
4. For posted distributions, if you edit a field that affects the general ledger, such as **Account** or **Amount**, enter information about the adjustment.
 - a. Under **Adjustment details**, enter the dates to associate with the adjustment and the posting of the adjustment to the general ledger.
 - b. In the **Adjustment reason** field, select the reason code to explain the need for the adjustment.
 - c. In the **Adjustment details** box, enter any additional information about the adjustment.
5. Click **Save**. You return to the GL Distributions tab.

Adjust Revenue GL Distribution Screen

The table below explains the items on the Edit GL distribution for the revenue screen and Adjust GL distribution for the posted revenue screen screens. For information about how to access these screens, see [View GL Distributions on page 245](#).

Screen Item	Description
Revenue amount	This field displays the amount of the revenue posted or to be posted in the general ledger. The program enters this information when you add the revenue record.
Transaction type	This column displays the type of general ledger transactions, such as Credit or Debit.
Reference	This column displays the type of revenue transaction, such as Event Registration Fee or Gift - Stock. Update this information as necessary.

Screen Item	Description
Account	<p>This column displays the number of the general ledger account credited or debited when the revenue posts.</p> <p>If you update this field on the Edit GL distribution for the posted revenue screen, the Adjustment Details frame is enabled.</p>
Amount	<p>This column displays how much of the revenue amount is distributed to each account. Update this information as necessary. The sum of the Amount column must equal the revenue amount. To distribute the revenue amount evenly between multiple accounts, click Distribute Evenly.</p> <p>If you update this field on the Edit GL distribution for the posted revenue screen, the Adjustment Details frame is enabled.</p>
Adjustment post date	<p>When you edit a posted revenue's distribution and the change affects the general ledger, this field is enabled. By default, the program automatically enters the current date in this field.</p> <p>Enter the date to associate with the posting of the adjustment in the general ledger.</p>
Adjustment date	<p>When you edit a posted revenue's distribution and the change affects the general ledger, this field is enabled. By default, the program automatically enters the current date in this field.</p> <p>Enter the date to associate with the adjustment to the revenue.</p>
Adjustment reason	<p>When you edit a posted revenue's distribution and the change affects the general ledger, this field is enabled.</p> <p>Enter a brief explanation about the adjustment, such as Data entry error or Insufficient funds.</p> <p>Select the reason code to explain the need for the adjustment. For information about reason codes for revenue adjustments, see the Administration section of the help file.</p>
Adjustment details	<p>When you edit a posted revenue's distribution and the change affects the general ledger, this field is enabled. Enter any additional information about the adjustment.</p>

Manage Completed Order Documentation

On the Documentation tab, you can add notes to track helpful or interesting pieces of additional information about orders. You can save links to relevant websites or related materials stored outside of the program. You can also attach items directly to records. When you attach a file, a copy of the file is stored in the database.

Notes

On the Documentation tab, you can add notes to track helpful or interesting information about your records.

Add Notes

On the Documentation tab, you can track **notes**¹ about your records.

> Add a note

1. Go to the Documentation tab of a record.
2. Click **Add note**. The Add a note screen appears.
3. Select a note type. Enter the date, title, author, and the content of the note.
4. Click **Save**. You return to the Documentation tab.

Add a Note Screen

Screen Item	Description
Type	Select the type of note. The system administrator configures note types.
Date	Enter the date of the note.
Title	Enter the title, or purpose, of the note.
Author	To search for an author, click the magnifying glass. A search screen appears.
Notes	Enter the content of the note.

Edit Notes

On the Documentation tab, you can edit **notes**² as necessary.

> Edit a note

1. Go to the Documentation tab of a record.
2. Click the double arrows beside a note and click **Edit**. The Edit note screen appears.

¹Notes are helpful or interesting information you can add to your event records. You can track notes about your records on the Documentation tab.

²Notes are helpful or interesting information you can add to your event records. You can track notes about your records on the Documentation tab.

3. Make changes as necessary to the note type, date, title, author, or note content.
4. Click **Save**. You return to the Documentation tab.

Delete Notes

After you add **notes**¹ to the Documentation tab, you can delete notes when necessary.

> Delete a note

1. Go to the Documentation tab of a record.
2. Click the double arrows beside a note and click **Delete**. A confirmation message appears.
3. Click **Yes**. You return to the Documentation tab, and the note no longer appears.

Media Links

On the Documentation tab, you can save links to websites or related materials stored outside of the program.

Add Media Links

When you add a media link, you enter the website address.

> Add a media link

1. Go to the Documentation tab of a record.
2. Click **Add media link**. The Add a media link screen appears.
3. Select a media link type. Enter the date, title, and author. Enter the URL for a website.
4. Click **Save**. You return to the Documentation tab.

Add a Media Link Screen

Screen Item	Description
Type	Select the type of media link. The system administrator configures media link types.
Date	Enter the date of the media link.
Title	Enter the title, or purpose, of the link.

¹Notes are helpful or interesting information you can add to your event records. You can track notes about your records on the Documentation tab.

Screen Item	Description
Author	To search for an author, click the binoculars. A search screen appears.
Media URL	Enter the URL for a website.

Edit Media Links

You can edit the URL for a website.

> Edit a media link

1. Go to the Documentation tab of a record.
2. Click the double arrows beside a media link and click **Edit**. The Edit media link screen appears.
3. Make changes as necessary to the media link type, date, title, or author. You can edit the URL for a website.
4. Click **Save**. You return to the Documentation tab.

Delete Media Links

After you add media links to the Documentation tab, you can delete them as necessary.

> Delete a media link

1. Go to the Documentation tab of a record.
2. Click the double arrows beside a media link and click **Delete**. A confirmation message appears.
3. Click **Yes**. You return to the Documentation tab, and the media link no longer appears.

Attachments

You can attach items to records. When you attach a file, the program stores a copy in the database.

Add Attachments

You can use attachments to track additional details about records. When you attach a file, the program stores a copy in the database.

> Add an attachment

1. Go to the Documentation tab of a record.
2. Click **Add attachment**. The Add an attachment screen appears.

3. Select an attachment type. Enter the date, title, and author. To search for the attachment, click **Choose file**.
4. Click **Save**. You return to the Documentation tab.

Add an Attachment Screen

Screen Item Description

Type	Select the type of attachment. The system administrator configures attachment types.
Date	Enter the date of the attachment.
Title	Enter the title, or purpose, of the attachment.
Author	To search for the author, click the binoculars. A search screen appears.
File	To locate the attachment, click Choose file . To view an attachment, click Open file . To remove an attachment, click Clear file .

Edit Attachments

On the Documentation tab, you can edit an attachment. You can remove a file and choose a different file. You can also view an attachment.

> Edit an attachment

1. Go to the Documentation tab of a record.
2. Click the double arrows beside an attachment and click **Edit**. The Edit attachment screen appears.
3. Make changes as necessary to the attachment type, date, title, or author. To view an attachment, click **Open file**. To remove an attachment, click **Clear file**. To select a different file, click **Choose file**.
4. Click **Save**. You return to the Documentation tab.

Delete Attachments

After you add an attachment to the Documentation tab, you can delete it as necessary.

> Delete an attachment

1. Go to the Documentation tab of a record.
2. Click the double arrows beside an attachment and click **Delete**. A confirmation message appears.
3. Click **Yes**. You return to the Documentation tab, and the attachment no longer appears.

Print Orders, Tickets, and Sales Documents

When an order is complete, tickets and other sales documents like itemized receipts and will call headers either print immediately or are deferred and must be printed manually. The delivery method selected for an order determines whether sales documents print immediately or are deferred. You can configure the print settings for each individual delivery method your organization uses.

Note: In order to print tickets and sales documents, a number of configuration tasks must be successfully completed. These tasks include adding workstations, defining printer lists, and configuring ticket and sales document templates. For information about print configuration tasks, see the *Tickets Guide*.

When you print tickets and sales documents manually, you have several options. You can print the entire order, which includes all tickets and sales documents that are relevant for the order, or you can print only the specific tickets or sales documents you need. Additionally, you can reprint an entire order or only specific tickets and sales documents that are needed.

Tip: When patrons arrive at your organization to pick up tickets that have not yet been printed or are part of an unpaid order, you can click **Pick Up Tickets** from *Sales* to quickly locate the orders, process payments, and print tickets. For more information, see [Pick Up Tickets on page 255](#).

Print or Reprint Orders

After payments are processed for an order and the balance reaches zero, the order is complete. When an order is complete, tickets and other sales documents like itemized receipts and will call headers either print immediately or are deferred and must be printed manually.

Note: The delivery method selected for an order determines whether sales documents print immediately or are deferred. Each individual delivery method your organization uses can be configured to print sales documents immediately or to defer printing. For information about how to configure delivery methods, see the *Tickets Guide*.

To manually print or reprint all tickets and sales documents for an order, you access the completed order record, and under **Tasks**, click **Print order**. You can then print all tickets and sales documents included in the order or select specific tickets and sales documents to print or reprint.

➤ Print or reprint an order

1. Open the completed order for which to print or reprint tickets and sales documents. For information about how to open a completed order, see [Search for Orders on page 240](#).
2. Under **Tasks**, click **Print order**. The Print tickets and sales documents screen appears. All printable tickets and sales documents are listed.

If tickets have not yet been printed for the order, all tickets and relevant sales documents are automatically selected for printing. If some tickets have been printed, only the unprinted tickets are selected for printing and none of the sales documents are selected. If all tickets have been printed, nothing is selected.

Note: Document types that are not configured with a valid sales document template cannot be printed and are not listed on the Print tickets and sales documents screen.

3. In the grid, select the corresponding checkbox for each ticket and sales document to print or reprint. Clear the checkboxes for the items you do not want to print.

Tip: To quickly select every ticket and sales document in the order, click **Check all**. You can also click **Check none** to quickly deselect every selected ticket. To select multiple tickets at once, hold **CTRL** on the keyboard and select each individual ticket, then click **Check selected**.

4. If you are reprinting a ticket, in the **Reason** field, select the reason for the reprint, such as "Lost ticket." This field is required when you reprint tickets.

Note: If you are printing a ticket for the first time, the **Reason** field is inactive.

5. Click **Print**. The selected tickets and sales documents print and you return to the Completed Order page.

Print or Reprint Tickets

After you add payment to an order and reach a zero balance, tickets are either printed automatically or deferred to be printed manually at a later time depending on the delivery method used for the order. From the Tickets tab of a completed order, you can manually print tickets that have been deferred or reprint tickets if necessary.

Note: On each delivery method, you configure a setting that determines whether sales documents print immediately upon order completion or if printing is deferred until a later time. For information about how to configure delivery methods, see the *Configuration Guide*.

You must print tickets manually if the delivery method assigned to the order has been configured to defer printing. For example, if the delivery method selected for the order is will call, and your organization prints all will call tickets upon the arrival of the patron, you can access the Tickets tab of a completed order and manually print tickets for patrons as they arrive.

If tickets have already been printed, you can reprint them as needed. For example, a patron may need replacement tickets if their order was lost in the mail. When tickets are reprinted, a new barcode ID is generated for each and the original barcode ID is invalidated.

> Print or reprint tickets

1. Open the completed order for which to print or reprint tickets. For information about how to open a completed order, see [Search for Orders on page 240](#).
2. Select the Tickets tab.
3. On the action bar, click **Print**. The Print tickets screen appears.
4. In the grid, select the corresponding checkbox for each ticket to print or reprint. By default, each ticket that has not yet been printed is automatically checked.

Tip: To quickly select every ticket in the order, click **Check all**. You can also click **Check none** to quickly deselect every selected ticket. To select multiple tickets at once, hold **CTRL** on the keyboard and select each individual ticket, then click **Check selected**.

5. If you are reprinting a ticket, in the **Reason** field, select the reason for the reprint, such as Lost ticket. This field is required when you reprint tickets.

Note: If you are printing a ticket for the first time, the **Reason** field is inactive.

6. Click **Print**. The selected tickets print and you return to the Completed Order page.

Print or Reprint Sales Documents

After payments are processed for an order and the balance reaches zero, the order is complete. When an order is complete, itemized receipts, will call headers, and other sales documents either print immediately or are deferred and must be printed manually.

Note: The delivery method selected for an order determines whether sales documents print immediately or are deferred. Each individual delivery method your organization uses can be configured to print sales documents immediately or to defer printing. For information about how to configure delivery methods, see the *Tickets Guide*.

To manually print or reprint sales documents for an order, you access the completed order record, select the Sale Documents tab, and click **Print**. You can then select the specific sales documents you want to print or reprint.

➤ Print or reprint sales documents

1. Open the completed order for which to print or reprint sales documents. For information about how to open a completed order, see [Search for Orders on page 240](#).
2. Select the Sales Documents tab.
3. On the action bar, click **Print**. The Print sales documents screen appears. All printable sales documents are listed.

Note: Document types that are not configured with a valid sales document template cannot be printed and are not listed on the Print sales documents screen.

4. In the grid, select the checkbox for each sales document to print or reprint.

Tip: To quickly select every sales document, click **Check all**. You can also click **Check none** to quickly deselect every selected document. To select multiple tickets at once, hold **CTRL** on the keyboard and select each individual document, then click **Check selected**.

5. Click **Print**. The selected sales documents print and you return to Sales Documents tab, which displays a history of the documents that have been printed and reprinted for this order.

Common Print Issues

When you print orders, tickets, and sales documents, there are several common issues you may encounter. These issues are usually caused by configuration problems and are described in detail below. To avoid problems when printing, make sure the required print configuration tasks have been successfully completed. These tasks include adding workstations, defining printer lists, and configuring

ticket and sales document templates. For information about print configuration tasks, see the *Tickets Guide*.

Issue	Error Message	Explanation
No template defined for this document type for this delivery method/sales method	No message appears.	If a document does not print when you think it should, verify that a sales document template has been correctly defined and configured for the relevant document type.
All templates for this document type are inactive for this delivery method/sales method	No message appears.	If a document does not print when you think it should, verify that an active sales document template is associated with the related document type.
Workstation not defined for this machine	No message appears	Verify that a workstation has been added to the system for the machine you are attempting to print from.
Workstation defined for this machine is inactive	No message appears	Workstation can be marked "Inactive." Verify that the workstation you are attempting to print from is an "Active" workstation.
Workstation found, no printers defined	"Unable to find valid printer for this workstation."	Verify that printers have been correctly added to the workstation you are attempting to print from.
Workstation found, all defined printers are invalid	"Unable to find valid printer for this workstation."	Verify that printers have been correctly added to the workstation you are attempting to print from and are also included in a valid printer list.
Printer is offline	No message appears.	If documents do not print as expected, verify that your printers are online.
Printer is out of stock/paper	No message appears.	If documents do not print as expected, verify that your printers have paper.

Pick Up Tickets

When patrons arrive at your organization to pick up tickets that have not yet been printed or are part of a "pay on arrival" order, you can click **Pick Up Tickets** to quickly locate the orders, process payments, and print tickets. When you click **Pick Up Tickets**, the Pick Up Tickets screen appears and provides specific search options to help you efficiently locate unpaid orders, as well as orders that are paid but have not yet been printed.

Note: Group orders and group tickets are not accessible through Pick Up Tickets. To complete a group order, you click **Group check in**. For more information, see [Group Check In on page 257](#).

Complete Unpaid Orders and Print Tickets and Sales Documents

There may be situations where a patron arrives and needs to pay for an order that already exists. For example, they may have ordered tickets over the phone and deferred payment until they arrive or they may have submitted a partial payment and a balance remains. Before they receive their tickets, they will need to pay the order balance. From *Sales*, you can efficiently complete unpaid orders and print the associated tickets.

➤ Complete an unpaid order and print tickets and sales documents

1. From *Sales*, click **Pick up tickets**. The Pick Up Tickets Search screen appears.
2. Enter criteria to help you locate the unpaid order. You can enter the recipient's name or the name of the patron who placed the order.
3. After you enter criteria to help locate the unpaid order, click **Search**. The **Results** grid displays orders that meet the criteria you entered. The **Amount due** column displays the remaining balance for any unpaid orders.
4. Select the unpaid order to complete and click **Select**. The order page opens with the Complete Order tab displayed.
5. Add payments to complete the order. When the balance due is \$0.00, click **Complete order**. After the order is complete, you can print the associated tickets and sales documents.
 - If the order's delivery method is configured for immediate printing, the tickets and sales documents print automatically.
 - If printing is deferred, access the Completed Order page. Under **Tasks**, select **Print order** to print tickets and sales documents.

Print Tickets and Sales Documents for Paid Orders

It is common for patrons to purchase tickets in advance and select will call or pick-up as the delivery method. In these cases, the tickets are not mailed to the recipient. Instead, they are either printed prior to the recipient's arrival or they are printed when the recipient arrives at your organization. From *Sales*, you can efficiently print tickets for paid orders.

➤ Print tickets and sales documents for a paid order

1. From *Sales*, click **Pick up tickets**. The Pick Up Tickets Search screen appears.
2. Enter criteria to help you locate the paid but unprinted order. For example, you can enter the recipient's name or the name of the patron who placed the order, or the last four digits of the credit card used to make the purchase.
3. After you enter criteria to help locate the order, click **Search**. The **Results** grid displays orders that meet the criteria you entered. For fully paid but unprinted orders, the **Amount due** column displays \$0.00 as the remaining balance.

4. Select the order to print and click **Select**. The Completed Order page appears.
5. Under **Tasks**, click **Print order**. The Print tickets and sales documents screen appears. All printable tickets and sales documents are listed.

If tickets have not yet been printed for the order, all tickets and relevant sales documents are automatically selected for printing. If some tickets have been printed, only the unprinted tickets are selected for printing and none of the sales documents are selected. If all tickets have been printed, nothing is selected.

Note: Document types that are not configured with a valid sales document template cannot be printed and are not listed on the Print tickets and sales documents screen.

6. In the grid, select the corresponding checkbox for each ticket and sales document to print or reprint. Clear the checkboxes for the items you do not want to print.

Tip: To quickly select every ticket in the order, click **Check all** under **Tickets to print**. You can also click **Check none** to quickly deselect every selected ticket. To select multiple tickets at once, hold **CTRL** on the keyboard and select each individual ticket, then click **Check selected**.

7. If you are reprinting a ticket, in the **Reason** field, select the reason for the reprint, such as "Lost ticket." This field is required when you reprint tickets.

Note: If you are printing a ticket for the first time, the **Reason** field is inactive.

8. Click **Print**. The selected tickets and sales documents print and you return to the Completed Order page.

Group Check In

When a group arrives at your organization on the day of their visit, they must be checked in. During this process, you verify the number of visitors in the group and update the reservation to reflect the actual attendees. You may need to add or remove visitors from the reservation and possibly add new price types.

When you adjust the number of visitors for a group during check-in or edit price types, you can choose to keep the original order balance or you can update the balance to reflect any differences in cost. This is commonly used to accurately track the number of people that attend a group visit while maintaining the original agreed upon price. For example, if a group of 50 is booked to attend and only 48 show up, you can adjust the number of attendees so the count is accurate while leaving the agreed upon reservation cost intact.

Additionally, you can view the resources booked for the order and make sure they are adequate for the group. If needed, make adjustments to the resources and check for conflicts. If a balance is due on the reservation, you can process the final payment and make any other changes that are needed on the reservation.

Depending on your system role, you can check in groups directly from the reservation record or from the Group check in page accessed from *Sales*. Typically, ticket sellers will not have access to the group reservation record and must process group check in from the Group check in page. Group sales coordinators can check in groups from the reservation record or from the Group check in page.

The following procedure covers checking in groups from the Group check in page. For information about checking in a group from the reservation record, see [Process Group Check In on page 230](#).

➤ Check in a group from the Group check in page

1. From *Sales*, click **Group check in**. The Group check in page appears for the current day. All groups scheduled to arrive on this day are listed in the grid.

Tip: To view the itinerary for a group before checking them in, select a group and click **View report**.

2. Select a group and click **Check in group**. The Check in screen appears.

Check in ABC Learning Center - Sprague

Update Visitors
Additional Types
Update Resources

Total visitors: 52

	Type	Name	Quantity
	Group Student	Beverly Sprague	50
	Chaperone	Beverly Sprague	2

Update order balance based on new number of visitors
 Ignore conflicts when checking in

Current balance: **\$89.76**

Check in
Cancel

3. On the Update Visitors tab, confirm the final count for the group.
 - If the group has a single itinerary and adjustments to the total number of visitors are needed, update the quantity of each price type in the grid.
 - If the group has multiple itineraries and adjustments to the total number of visitors are needed, click **Update quantities**. The grid now displays a column for each itinerary so you can see the price types and ticket quantities associated with each. If needed, you can filter the grid by price type. Update the quantity of each price type in the grid. When you are done, click **View totals** to return to the original grid view.

4. If the group contains additional visitors who require ticket price types not currently included in the reservation, select the Additional Types tab. In the **Type** field, select an additional type and enter the quantity. If the order contains multiple itineraries, select the itinerary that needs the additional types. To add the tickets to the order, click **Add**. The new price type is displayed in the grid.
5. The **Update order balance based on new number of visitors** checkbox is displayed at the bottom of the screen and is selected by default. This checkbox is editable only if you change the quantity of visitors on the Update Visitors tab or edit the price types on the Additional Types tab.
 - If you make changes to the number of visitors or price types, the cost of the group visit may change. To update the order balance to reflect the change in cost, leave the **Update order balance based on new number of visitors** checkbox selected. The total will be recalculated at check in, including any fees, discounts, and taxes.
 - To keep the original order balance regardless of the changes, clear the checkbox. This is commonly used to accurately track the number of people that attend a group visit while maintaining the original agreed upon price.

Note: The **Update order balance based on new number of visitors** checkbox applies only to tickets. If resource quantities change for the group, the cost associated with those resources is automatically recalculated.

6. On the Update Resources tab, review the supply and equipment resources booked for the group and make sure they are adequate. If visitors were added or removed from the reservation, the resources may need to be adjusted. Update resource quantities as needed. After you adjust resources, click **Check resource conflicts**. If conflicts exist, the Conflicts with itinerary screen appears and provides information to help you correct the conflict. Alternatively, you can choose to ignore conflicts when checking in.
7. On the Update Staff Resources tab, review the staff resources booked for the group and make sure they are adequate. If visitors were added or removed from the reservation, the staff resources may need to be adjusted. Update staff quantities as needed. After you adjust resources, click **Check resource conflicts**. If conflicts exist, the Conflicts with itinerary screen appears and provides information to help you correct the conflict. Alternatively, you can choose to ignore conflicts when checking in.
8. To ignore capacity and resource conflicts that can impact the group, mark **Ignore conflicts when checking in**. You should only ignore conflicts if you are certain no scheduling problems will result.
9. To proceed, click **Save**. If you did not mark **Ignore conflicts when checking in**, a number of conflict checks occur. For example, the capacity is checked for each item on the group's itineraries to make sure there is enough capacity for all visitors. Resources are also checked to make sure no conflicts exist between what is booked and what is available. If conflicts are found, you must resolve them on the reservation or manually ignore them before you can complete the check in.

If conflicts are ignored or not found, the group is checked in and the Completed Order page appears. The status of the order is now set to "Complete."

Tip: From the Completed Order page, under **Reports**, click **Itinerary report** to view and print copies of the group's itineraries. You can give these to the group so they have schedules for the day's activities.

Preregistered Program Check In

The Preregistered Program Check In page provides a central location to see the preregistered programs scheduled for the current day and to check in program attendees as they arrive. Check in is not a required process, it simply provides a way for your organization to track attendance for your preregistered program events.

When you access the Preregistered Program Check In page, you can mark registrants as attended or not attended and view a roster of attendees for a selected event that takes place on the current day. When a registrant is marked as attended on this page, they are also marked as attended on the Registrants tab of the corresponding event record.

During the check in process, if a balance remains for an attendee, you can click **Go to order** to access their order record and add payments. Additionally, if you need to edit the registrants or their registration information, you can click **Go to event** and adjust items on the Registrants and Registration information tabs respectively. For more information, see [Manage Registrants for Preregistered Programs on page 261](#).

Note: The preregistered programs that appear on this screen are only those scheduled for the current day. To mark registrants as attended or not attended after an event has occurred, you must access the Registrants tab of the specific event record.

➤ Check in preregistered program attendees

1. From *Sales*, click **Preregistered program check in**. The Preregistered Program Check In page appears for the current day. All programs that require registration and are scheduled to occur on this day are listed.

Tip: To view a roster for a specific preregistered program, select a program and click **View roster**. The Preregistered Program Roster is displayed and provides a printable list you can use to track who has attended an event that requires registration.

2. In the grid on the left, select the preregistered program for which to check in attendees. After you select a program, the grid on the right displays the registrants. Any unnamed registrants are listed as "Guest of" the named constituent host or attendee.

Note: Any registrants who have already been marked as attended are displayed in green. Registrants that have not yet been marked as attended are displayed in black, while registrants with a status of canceled are displayed in red.

3. Select a registrant to check in and click **Mark as attended**. If a registrant is currently marked as canceled but they attend the event, you can mark them as attended on this screen. Additionally, if you mark a registrant as attended in error, you can change their status back to not attended.

Tip: To check multiple registrants in at the same time, hold down the **CTRL** key and use the mouse to click each attendee to select. You can also hold down **SHIFT** and click to select a range of registrants. After multiple people are selected, click **Mark as attended**. You can also select a group of people to mark as not attended in this same way.

4. If a balance remains for an attendee, you can click **Go to order** to access their order record and add payments. Additionally, if you need to edit the registrants or their registration information for a specific event, you can click **Go to event** and adjust items as needed on the Registrants and Registration information tabs respectively. For more information, see [Manage Registrants for Preregistered Programs on page 261](#).
5. After you check in the current group of attendees, you can exit the Preregistered Program Check In page. When more attendees arrive, you can access the screen again and repeat the check in process.

Manage Registrants for Preregistered Programs

When tickets are sold for a preregistered event, a patron must be associated with the order. This patron can be one of the attendees or just a “host” registrant who will not attend. For example, John Connor may register his daughters for an art workshop that he is not attending. In this scenario, the daughters are the attending registrants and John Connor is saved with the order as a non-attending registrant.

In addition to associating a patron with the order, you select price types and enter registration information for the attendees during the sales process. The attendees can be unnamed registrants that are identified only by the selected price types or you can select or add a constituent record for each. If applicable, the registration information you enter is associated with each attendee and can be used to record contact information, meal types, preferred shirt sizes, or other relevant information.

Note: If event restrictions have been added to a patron’s constituent record, they are listed on the Registrants tab of the event record. For example, if a constituent is allergic to nuts and that allergy was added to the Personal tab of the patron’s constituent record, it is displayed in the **Registrants** grid on the Registrants tab. The restrictions can be edited only on the Personal tab of the constituent record.

After a preregistered ticket sale is complete, you can manage the event registrants in different ways. For example, you can edit registrant information, as well as mark registrants as “Canceled.” You can also print a roster of event registrants to use as part of a manual check-in process. After the event, you can go to the event record and mark registrants as attended or not attended.

Note: The tasks related to managing registrants for a preregistered program are typically completed by a Guest Services Manager.

Edit Registrants and Preferences

After a preregistered ticket sale is complete, you can edit the event registrants and their registration information as needed. For example, you can change the registrant price types, select or add a new constituent record to associate with a registrant, or edit the registration information for a registrant. You edit the registrants and registration information on the event record. These tasks are typically completed by a Guest Services Manager or another user who can access event records.

➤ Edit registrants and registration information

1. From *Tickets*, click **Program search**. The Program Search screen appears.

2. Enter criteria to locate the program that contains the event for which to edit registrants and click **Search**. In the **Results** grid, select the program and click **Select**. The program screen appears.
3. Select the Event List tab. In the grid, locate the event record and double-click it. The event record opens.

Tip: You can also open an event record from the Calendar tab. Just navigate to the month and day the event is scheduled and double-click the event.

4. Select the Registrants tab. This tab appears only if the event you are viewing is scheduled for a program that requires registration.

Note: If event restrictions have been added to a patron's constituent record, they are listed in the **Restrictions** column of the **Registrants** grid. For example, if a constituent is allergic to nuts and that allergy was added to the Personal tab of the patron's constituent record, it is displayed in the **Restrictions** column. The restrictions can be edited on the Personal tab of the constituent record.

5. In the grid, select the registrant to edit and click **Edit**. The Edit registrant screen appears.
6. Depending the registrant you selected, either their name or "Unnamed guest" is displayed in the **Registrant** field. Click the magnifying glass to change the selected patron or to add a new one.
7. In the **Registration information** grid you can edit the registration information for the registrant. For example, if there is a "Shirt size" question configured for the event and the registrant previously selected "Medium," in the **Option** column you can select a different size.
8. In the **Notes** field, you can enter additional information regarding each registrant. This is helpful for tracking special needs or requests.
9. Click **Save**. You return to the event record and the updated registrant name and registration information are displayed in the grid.

View and Print a Preregistered Event Roster

The Preregistered Program Roster report is intended to be a printable list you can use to track who has attended an event that requires registration. You can use this report as part of a manual check-in process where you verify the registrants and preference selections as they arrive. You can then mark them as attended on the report. After the event, with the attendance information, you can access the Registrants tab on the event record and mark the corresponding registrants as attended or not attended.

Note: If event restrictions have been added to a patron's constituent record, they are listed in the **Restrictions** column on the report. For example, if a constituent is allergic to nuts and that allergy was added to the Personal tab of the patron's constituent record, it is displayed in the **Restrictions** column. The restrictions can be edited on the Personal tab of the constituent record.

➤ View and print a Preregistered Event Roster

1. From *Tickets*, click **Program search**. The Program Search screen appears.

2. Enter criteria to locate the program that contains the event for which to view the roster report and click **Search**. In the **Results** grid, select the program and click **Select**. The program screen appears.
3. Select the Event List tab. In the grid, locate the preregistered event for which to view or print a roster and double-click it. The event record opens.

Tip: You can also open an event record from the Calendar tab. Just navigate to the month and day the event is scheduled and double-click the event.

4. Under **Tasks**, click **View roster**. The Preregistered Event Roster report is displayed for this event.

Note: The **View roster** task appears only if the event you are viewing is scheduled for a program that requires registration.

Tip: You can also view and print a Preregistered Program Roster from *Sales*. When accessed from *Sales* you can select a specific preregistered program along with the date parameters for the corresponding event.

Mark Registrants as Canceled

When a refund is processed for a preregistered program event, the registrants involved in the refund are still listed as attendees on the event record. They are not automatically removed or marked "Canceled." However, you can access the Registrants tab on event record and manually mark the registrants as "Canceled" if you want to track that information.

➤ Mark registrants as canceled

1. From *Tickets*, click **Program search**. The Program Search screen appears.
2. Enter criteria to locate a program and click **Search**. In the **Results** grid, select the program and click **Select**. The program screen appears.
3. On the Event List tab, double-click the preregistered event. The event record opens.

Tip: You can also open an event record from the Calendar tab. Just navigate to the month and day the event is scheduled and double-click the event.

4. Select the Registrants tab. This tab appears only if the event is for a program that requires registration.
5. In the grid, select a registrant and click **Mark, Mark as canceled**. A confirmation screen appears.
6. Click **Yes**. You return to the Registrants tab and the **Attended** status in the grid now reads "Canceled." In the grid, the canceled registrant's row is now displayed in red.

Mark Registrants as Attended or Not Attended

On the Registrants tab of an event record, you can mark registrants as attended or not attended. You can use this functionality along with the Preregistered Program Roster to track preregistered event

attendance. Prior to the event, you can print a Preregistered Program Roster and as attendees arrive you can mark them as “Attended” on the report and verify their preference selections.

After the event, with the attendance information noted on the report, you can access the Registrants tab on the event record and mark the corresponding registrants as attended or not attended. For information about the Preregistered Program Roster, see [View and Print a Preregistered Event Roster on page 262](#).

Tip: To mark registrants as attended or not attended after an event has occurred, you must access the Registrants tab of the specific event record as described in the following procedure. If your organization marks preregistered program registrants as attended when they arrive, you can save time by using the Preregistered Program Check In page. For more information, see [Preregistered Program Check In on page 260](#).

➤ Mark registrants as attended or not attended

1. From *Tickets*, click **Program search**. The Program Search screen appears.
2. Enter criteria to locate the program that contains the event for which to mark registrants as attended or not attended and click **Search**. In the **Results** grid, select the program and click **Select**. The program screen appears.
3. Select the Event List tab. In the grid, locate the preregistered event for which to mark registrants as attended or not attended and double-click it. The event record opens.

Tip: You can also open an event record from the Calendar tab. Just navigate to the month and day the event is scheduled and double-click the event.

4. Select the Registrants tab. This tab appears only if the event you are viewing is scheduled for a program that requires registration.

Note: By default, all registrants are marked as not attended until you mark them as attended.

5. In the grid, select the registrant to mark as attended or not attended. On the action bar, click **Mark** then select **Mark as attended** or **Mark as not attended**. You can also select **Mark all as attended** to quickly mark all registrants listed on the tab as attended. A confirmation screen appears.
6. Click **Yes**. You return to the Registrants tab and the **Attended** status in the grid now reads “Yes” or “No” depending on your selections.

Note: If a registrant is currently marked as canceled but they attended the event, you must change their status to not canceled before you can mark them as attended.

Unresolved Online Sales Orders

For online sales, the program assigns a status of “Unresolved” to sales orders after website users make payments. The program uses this temporary status to create records for online sales orders even if errors prevent it from processing the orders.

For example, if an item such as a membership program is not mapped to an account in the General Ledger, the program can accept an online payment for the item but cannot process a sales order. If the

payment is not associated with a sales order, you will not have a record of the payment, so the program creates a record for the unresolved online sales order and associates it with the payment.

On the Unresolved Online Sales Orders page, you can view a list of all unresolved sales orders and access the records. When you access an unresolved order, a **View unresolved order error** link appears. You can click this link to access notes about error so that you can address the issue or refund the payment. For example, if you accept an online payment for a membership program before you map it to the General Ledger, you can access any unresolved online sales orders after you map the membership program to the General Ledger and process the sales order.

To access unresolved online sales, go to *Sales* and click **Unresolved online sales orders**. The Unresolved Online Sales Orders page appears.

On this page, you can click unresolved sales orders in the grid to access records. You can then resolve issues or refund payments. When you access a record, the **View unresolved order error** link allows you to access notes about the error that prevented the program from processing the sales order.

In addition, you can click **View RSS Feed** to open a web browser and subscribe to an RSS feed to receive alerts about unresolved online sales orders for your organization.

Pending Orders

You can also view pending orders from the Unresolved Online Sales Orders page. Pending orders are similar to unresolved orders except they contain fewer details and are not yet linked to a payment. You can resolve a pending order from the **Pending Orders — Charged** section on the page.

To view details about a pending order, select its order number to open its temporary record.

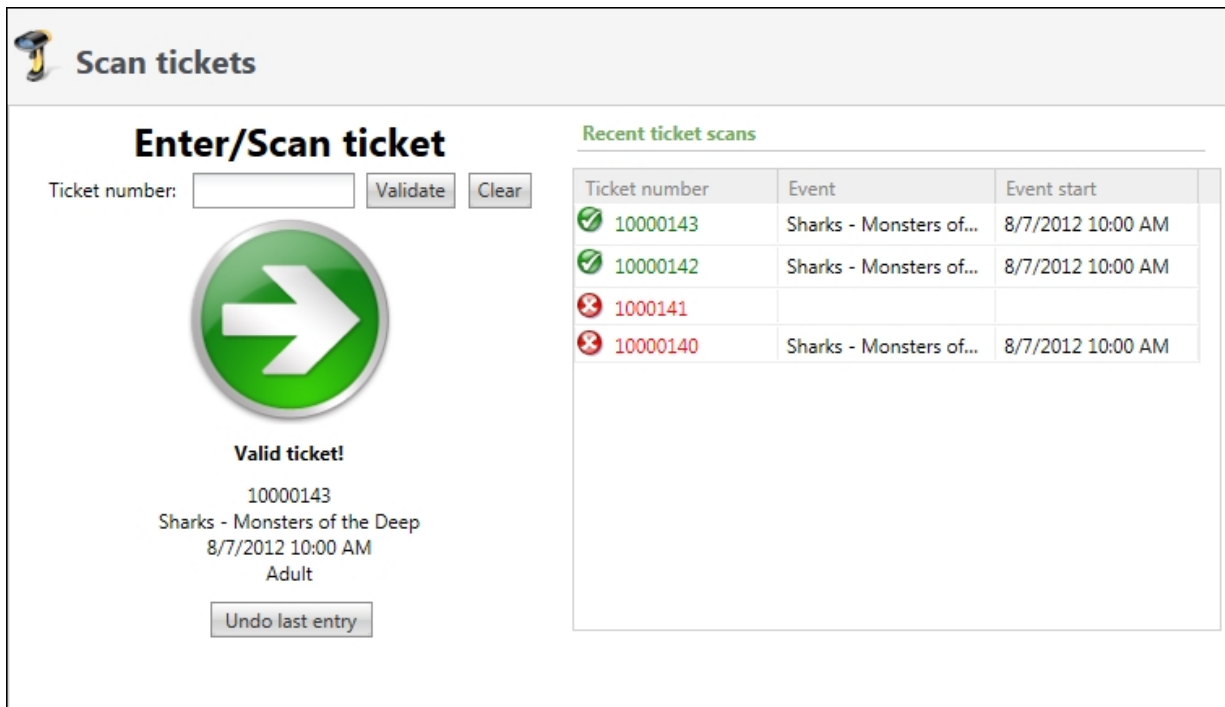
To convert to an unresolved order, expand its row, then select **Mark unresolved**. This action links the order to its corresponding payment, and the order now appears as an unresolved order. You can then open the unresolved order to resolve issues or refund payments as needed.

Scan Tickets

You can scan tickets for scheduled programs such as admissions or tours. If you do not have a scanner or have issues scanning a ticket, you can manually enter the ticket number. If the ticket scanned is invalid, a red image appears, otherwise a green image appears. You can also override an invalid entry and undo the last entry. You can also view the last ten tickets scanned under **Recent ticket scans**. You can also click the **Clear** button to clear the image and any information entered in the **Ticket number** field.


Scan Tickets from Sales

1. From *Sales*, click **Scan tickets**. The Scan Tickets page appears.



Enter/Scan ticket

Ticket number:



Valid ticket!
 10000143
 Sharks - Monsters of the Deep
 8/7/2012 10:00 AM
 Adult

Recent ticket scans

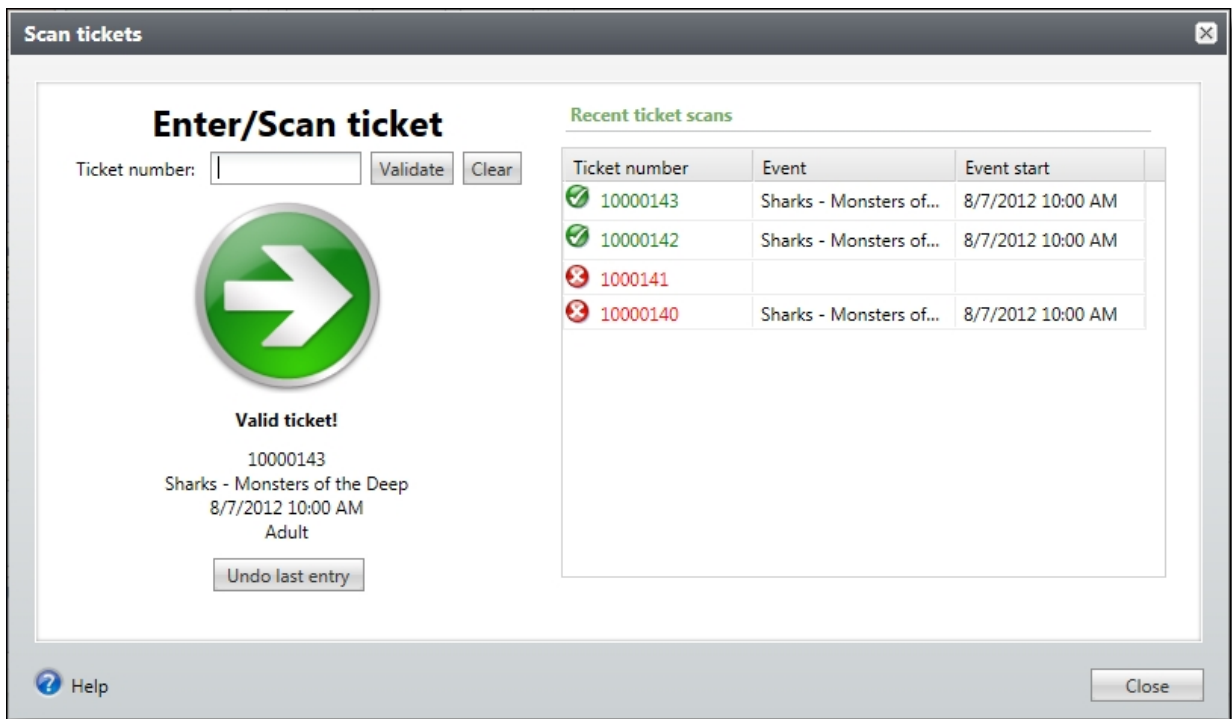
Ticket number	Event	Event start
✓ 10000143	Sharks - Monsters of...	8/7/2012 10:00 AM
✓ 10000142	Sharks - Monsters of...	8/7/2012 10:00 AM
✗ 1000141		
✗ 10000140	Sharks - Monsters of...	8/7/2012 10:00 AM

Note: You can also scan tickets from the Daily Sales page. To do this, you must first activate the default daily sales button, **Scan tickets**. To activate the button, from *Tickets*, click **Configure daily sales buttons**, under **Configuration**.

2. Scan the ticket or manually enter the ticket number and click **Validate**. Under **Recent ticket scans**, you can view the last ten tickets scanned.
3. Verify the information. If the ticket is invalid, you have the option to override the scan and allow entry. You can also undo the last valid entry in case the ticket information does not match the patron's information. To do this, click **Undo last entry**.

Scan Tickets from Daily Sales Page

1. From *Sales*, click **Daily sales**. The Daily Sales page appears.
2. Click **Scan tickets**. The Scan tickets screen appears.



Note: You can also scan tickets from *Sales*, click **Scan tickets**, under **Daily tasks**.

3. Scan the ticket or manually enter the ticket number and click **Validate**. Under **Recent ticket scans**, you can view the last ten tickets scanned.
4. Verify the information. If the ticket is invalid, you have the option to override the scan and allow entry. You can also undo the last valid entry in case the ticket information does not match the patron's information. To do this, click **Undo last entry**.

Batch Print Tickets

From the Batch Print Tickets page in *Sales*, you can print tickets in advance for events such as scheduled events, pre-registered programs, and daily admission tickets. For example, you can select to batch print will call tickets needed for tomorrow, at the end of the day today. Batch printing includes orders with a delivery method set to deferred printing and excludes group sales or pick-up ticket orders.

Note: Before you can batch print tickets, you must install the Workstation Interface on all machines used for batch printing. For more information, see the [Tickets Guide](#).

➤ Batch Print Tickets

1. From *Sales*, under **Manage orders**, click **Batch print tickets**. The Batch Print Tickets page appears.
2. Click **Select tickets to print**. The Batch print tickets screen appears.

3. In **Event date**, select the dates for the tickets you want to include in this batch. For example, if you want to print tickets for events happening the next day, select **Tomorrow**.
4. In **Delivery method**, select the delivery method for the tickets you want to print. For example, if you want to print tickets with a delivery method of will call, select **Will call**.
5. If you want to include daily admission programs in your batch print, select the corresponding checkbox.
6. In **Group tickets by**, you can select to group the tickets by event or patron. This affects the order the tickets are printed. For example, if you select to group by patron the tickets print in alphabetical order by recipient and if you select to group by event the tickets are grouped by event then recipient.
7. In the grid, you can select to print all or clear all tickets. You can also select specific tickets to print by selecting the checkbox beside the event or patron as necessary.
8. In **Print headers**, you can select the type of header you want to print.
9. After you have defined your settings and the tickets you want to print, to begin printing, click **Start printing**. The **Printing Batch** screen appears.

Note: Do not close the screen, until the completion screen appears, unless you want to cancel the print job.

10. When the print job is complete, the completion screen appears with a green checkmark and you can close the screen and pick up your tickets from the printer.

View Printed Ticket Batches

To access the Printed Batch page, on the Batch Print Tickets page, select the batch you want to view and click the link under the **Printed on** column. On this page, you can view all the tickets printed in a selected batch. You can also reprint the entire batch or reprint selected tickets. For information about how to reprint the entire batch or selected tickets, see [Reprint ticket batch on page 268](#).

➤ Reprint ticket batch

You can reprint an entire batch or reprint selected tickets within a batch.

1. From *Sales*, click **Batch print tickets**. The Batch Print Tickets page appears.
2. Click the link under the **Printed on** column. The Printed Batch page appears.
3. To reprint the entire ticket batch, on the page that appears click **Reprint entire batch** or to reprint selected tickets, select the checkbox beside the tickets you want to reprint and click **Reprint selected tickets**. The Reprint Ticket Batch screen appears.

Note: To reprint the entire batch from the Batch Print Tickets page, click **Reprint entire batch**. The Reprint Ticket Batch screen appears.

4. On the screen that appears, you select the printer, header to print between orders, and the reason you are reprinting.
5. Review your selections and click **Start printing**. The **Printing Batch** screen appears.

Note: Do not close the screen, until the completion screen appears, unless you want to cancel the print job.

6. When the print job is complete, the completion screen appears with a green checkmark and you can close the screen and pick up your tickets from the printer.

Reschedule Tickets

From *Sales*, you can reschedule tickets for events and event packages. Tickets can be rescheduled only for events or packages of the same program and price type. If you want to reschedule tickets for a different price type or program, we recommend you refund the tickets and purchase new ones.

When you reschedule tickets, you can override event capacity and price differences. A message appears to confirm you want to increase capacities or override price differences. If you do not want to override the price difference, you have to refund the ticket and purchase the event or event package again.

To access the Reschedule Tickets page, from *Sales*, under **Manage order**, click **Reschedule tickets**. The page appears.

On the page that appears, an order search is available and returns only orders with tickets available to be rescheduled. When an order is selected, constituent information appears and the items available to be rescheduled appear in the grid. You can click on the constituent name to go to the Constituent page or the Order number to go to the Sales Order page. In the grid, you can view information about each ticket item, such as the amount paid, and select a different event or event package.

When you select an order containing an event package, the package loads in the grid along with all of its associated events. You can select an upcoming package or search for packages farther in the future. You cannot reschedule any of the individual events within the package.

➤ Reschedule Ticket Events

1. From *Sales*, under **Manage order**, click **Reschedule Tickets**. The Reschedule Tickets page appears.
2. In the order search, enter the last name of the patron or order number. If more than one order is available the **Reschedule Tickets Order Search** screen appears. Enter additional search criteria and click **Search**, or, under **Results**. The tickets available to reschedule appear under **Items to reschedule**.
3. In the **New date and time field**, select a reschedule date and time. If the event is a preregistered program, make sure that the registrant and barcode match.
4. After you verify that the changes are accurate, click Complete to process the reschedule. The Sales Order page appears.

Find Tickets Available to Reschedule

The **Reschedule Tickets Order Search** screen, searches for orders with tickets available to reschedule. You can define criteria such as order number, last name and payment method. You can also use the Date field to search based on date. After you entered your criteria, click **Search**. Under **Results**, all

orders matching your criteria with tickets available to reschedule appear. Select the order you want to reschedule tickets for and click **Select**.

You can access this search from the Reschedule Tickets page.

Find Available Events

The **Reschedule Tickets Available Events Search** screen searches for available events or event packages to be rescheduled. For example, if a patron wants to reschedule their art class for another art class at a different date or time, this search can be used to find additional classes that do not appear in the drop-down on the Reschedule tickets page.

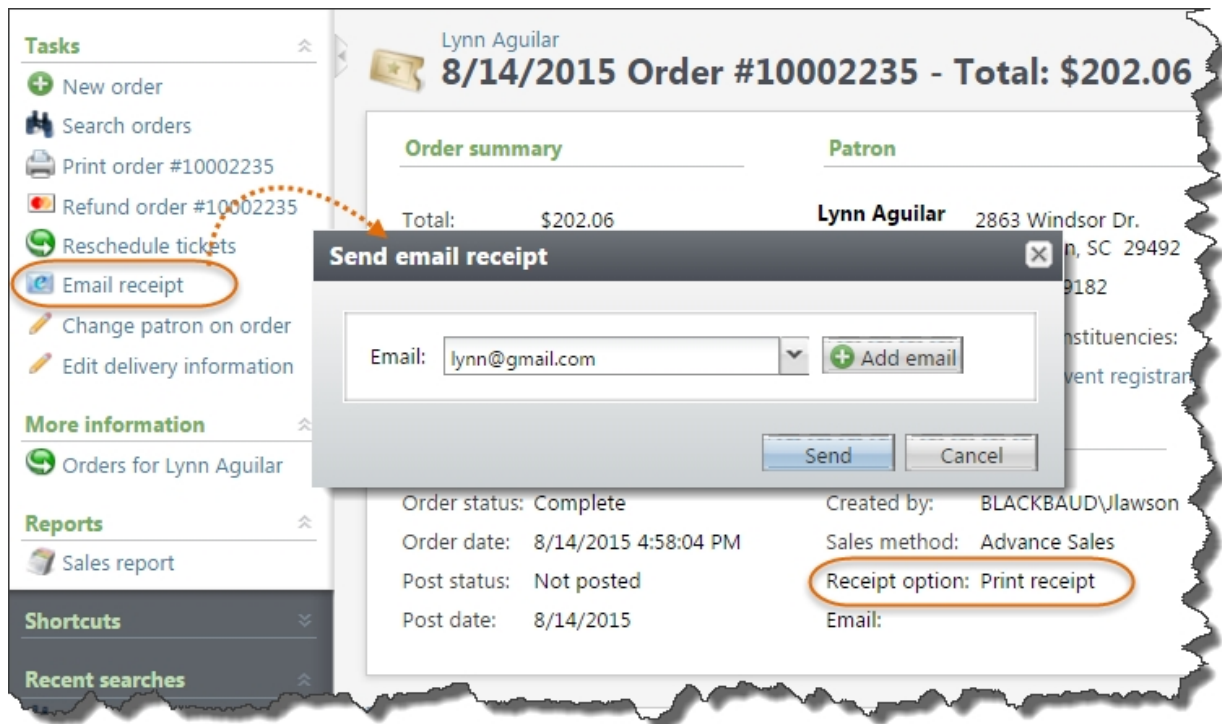
Since you can only reschedule tickets for the same program event and price type, only those results appear in the search. You can use the **Date** field to define some criteria and select to show past events or events with no availability. If you find an event or package to reschedule with, select it and click **Select**.

You can access the **Reschedule Tickets Available Events Search** screen, from the Reschedule tickets page under the **New date and time** column.

Email Receipts for Sales Orders

When a patron requests a copy of their itemized receipt, you can send it by email. From the sales order, click **Email receipt** under **Tasks**. The Send email receipt screen appears.

The **Email** field displays all email addresses saved to the patron's record. Or you can click **Add email** to add a new email address to the patron record. If the original receipt was emailed to a purchaser that is not a patron, the address entered in the email field on the sales order appears here. If you do not have an email address for the purchaser at all, you can enter one in the field.



Note: If the sales order was created in *Daily Sales* or *Advance Sales*, the **Receipt option** field in the **General** section displays how the receipt was provided during the initial sale (printed, emailed, or no receipt). If you use the **Email receipt** task to send a copy, the **Receipt option** field does not update. It always displays the original receipt option used.

Note: When you email a receipt from a reservation in *Group Sales*, all information on the receipt is based on the date the receipt is emailed. If the sales order was created in *Daily Sales* or *Advance Sales*, the emailed receipt is always a copy of the original receipt and will not reflect any changes to the order, such as discounts or refunds, since the initial sale.

Email Tickets

When patrons lose or do not receive an email with a link to the eTickets page, you can resend the eTicket email for tickets with an Active or Reserved status.

From the sales order record, you can resend the email from the Tickets tab or under **Tasks**.

The patron's primary email address appears in the **To address** field, if available. A default reply message appears in the editor. If you edit this message, be aware that spam filters base their filtering on the content of the message. We recommend that you test the updated message before sending it to patrons.

Note: Only users in these roles can access this feature: Altru Essentials, Guest services manager, Group sales Coordinator, Marketing Manager, and Ticket Seller.

Resend Acknowledgment Emails

When a patron requests a copy of their acknowledgment email, you can send it from the order record. From the sales order, click **Email acknowledgement** under **Tasks**. The Send email acknowledgement screen appears.

The **Email** field displays all email addresses saved to the patron's record. To add a new email address, click **Add email**.

Under **Email**, choose which of the patron's email addresses to use. Or you can click **Add email** to add a new email address to the patron's record.

Note: Note: The emailed acknowledgement is always a copy of the original receipt and will not reflect any changes to the order, such as discounts or refunds, since the initial sale.

Refunds

Refund Transactions	274
Find Items to Refund Screen	277
Refunds page	278
Back Office Refunds and the Close Drawer and Deposits	279
Search for Refunds	280
Refund Search Screen	280
Refund Record	281
Retry Credit Card Refunds	282
Link or Unlink Deposits to Payments	282
Edit Refund Comments	283
Edit the Refund Reason	283
Recent Refunds	283
Refunds for Group Sales Reservations	285

You may need to refund a sales order, an order item, an event registration, or a membership renewal, such as due to a canceled event or dissatisfied patron. From *Sales*, you can add refunds for event registrations, memberships, and sales orders that do not include group sales reservations. When you refund a sales order or membership, you can select to refund the full transaction or a portion of the transaction.

You can also refund group reservations before check-in. After check-in, you can only refund overpaid amounts. For information about how to refund group reservations, see [Refunds for Group Sales Reservations on page 285](#).

Tip: To refund another type of payment application such as a pledge installment or matching gift, edit the payment amount to deduct the amount refunded. When you edit a credit card payment that has been processed, the **Refund card on save** checkbox appears when the payment processor supports refunds. If you reduce the payment amount, select this checkbox to receive a prompt to automatically issue a refund for the difference.

From *Financials*, you can view recently processed refunds. For transactions refunded by check, you can indicate when your organization issues the refund to the constituent.

Refund Transactions

You may need to refund a sales order, an order item, an event registration, or a membership, such as due to a canceled event or dissatisfied patron. From *Sales*, you can add refunds for sales orders, event registrations, and memberships.

Note: You cannot refund a credit card transaction after 60 days. However, you can select a different method to refund the payment. For example, you can process the refund in the form of a check or cash.

- When you refund a sales order, you can select to refund all items in the order or only specific items such as tickets, merchandise, or fees. When you refund a sales order, with scheduled or preregistered programs, you have the option to cancel the registrant and add the tickets back to inventory or you can leave the registrant active and tickets as sold. Taxes automatically refund for each item, and you can select whether to refund any fees.
- When you refund a membership, you can refund only the member's most recent membership transaction. If you refund a membership with a status of new, rejoin, or gift, you can decide if you want to leave the membership active or cancel it. If you refund the renewal or upgrade of a membership that has not yet expired, you can decide to cancel the renewal or upgrade or leave the membership the same.

Note: If you refund a membership with add-ons, you must refund its add-ons regardless if you decide to cancel the membership or not.

- When you refund a merchandise item, you have the option to refund the merchandise item back to inventory or leave the inventory the same.

Warning: When a front office user refunds a transaction entered through the back office, such as an event registration or membership, the refund will not automatically appear in the closed drawer or deposit. For information, see [Back Office Refunds and the Close Drawer and Deposits on page 279](#).

By default, an itemized receipt prints when you refund a sales order. The itemized receipt provides a record of all items refunded and includes all discounts, fees, and taxes applied during the original order. When you refund a sales order that contains a credit card payment, the default refund credit card receipt also prints and displays the amount refunded to the credit card. A customer copy and merchant copy print for both types of receipts. The merchant copies each provide a signature line that does not appear on the customer copies. Your organization should retain the signed merchant copies for your organization's records.

Note: When you include a refund in a deposit with a post date different than the refund date, the program updates the date and post date of the refund to match the post date of the deposit.

➤ Create a refund

1. From *Sales*, click **Refunds**. The Refunds page appears. For information about the items on this page, see [Refunds page on page 278](#).

The screenshot shows the 'Refunds' screen in the Altru software. The top navigation bar includes 'Home', 'Constituents', 'Marketing and Communications', 'Revenue', 'Sales', 'Events', 'Memberships', 'Prospects', 'Volunteers', 'Fundraising', 'Treasury', 'Financials', 'Web', and 'Tickets'. The user is logged in as 'UserA'.

The main content area is titled 'Refunds' and shows a search for 'Order #10000729' by 'Aaron C. Aaron'. Below the search, there is a section for 'Items to be refunded' with a table of items:

<input checked="" type="checkbox"/>	Name	Registrant	Bar code #	Price	Discount	Amount	Refund
<input checked="" type="checkbox"/>	Movie - Child - 12/06/13 11:00 AM	(Unnamed registrant)	10000291	\$1.00	\$0.00	\$1.00	\$1.00
<input checked="" type="checkbox"/>	Movie - Student - 12/06/13 11:00...	Aaron C. Aaron	10000290	\$8.00	\$0.00	\$8.00	\$8.00
<input checked="" type="checkbox"/>	Aquarium membership - Family (1...			\$150.00	\$0.00	\$150.00	\$150.00
<input checked="" type="checkbox"/>	Student Membership Program - H...			\$25.00	\$0.00	\$25.00	\$25.00
<input checked="" type="checkbox"/>	Total Contributions \ Operating \...			\$25.00	\$0.00	\$25.00	\$25.00
<input checked="" type="checkbox"/>	Service fee order			\$0.90	\$0.00	\$0.90	\$0.90

Value of items to be refunded: **\$209.90**

The 'Payment details' section includes a table for payment and refund methods:

<input checked="" type="checkbox"/>	Payment method	Refund method	Amount
<input checked="" type="checkbox"/>	\$210.08 Cash	Cash	\$210.08

Reason: [Dropdown menu]
 Comment: [Text area]

Summary of totals:

Order total:	\$210.08
Order discounts:	\$0.00
Tax refund amount:	\$0.18
Refund total:	\$210.08

Buttons: Refund, Cancel

2. Enter an order number or the patron's last name in the **Search** field. If there is more than one result, the **Find Items to Refund** screen appears. For information about the items on this screen, see [Find Items to Refund Screen on page 277](#).

Constituent:

Minimum amount:

Maximum amount:

Type:

Payment method:

Source:

Date search

Date:

Order details

Added by user:

Order #:

Items available for refund

Item	Constituent	Date	User	Source	Payment method	Amount
Order #1000083		9/7/2011	Charles Soderlund	Daily Sales	Cash	\$7.65
Order #1000087		9/7/2011	Charles Soderlund	Daily Sales	Credit card	\$61.20
Order #1000088		9/7/2011	Charles Soderlund	Daily Sales	Credit card	\$375.00
Order #1000086		9/7/2011	Charles Soderlund	Daily Sales	Cash	\$200.00
Order #1000084		9/7/2011	Charles Soderlund	Daily Sales	Cash	\$8.00
Donation - Total Contributions	Rachel A. Mitchum	9/7/2011		Back office	Cash	\$25.00
Donation - Total Contributions	Caitlin Aburrow	9/7/2011		Back office	Cash	\$25.00
Donation - Total Contributions	Rachel A. Mitchum	9/7/2011		Back office	Cash	\$25.00
Donation - Total Contributions	Caitlin Aburrow	9/7/2011		Back office	Cash	\$25.00

Note: The search results do not include membership transactions for recurring memberships, lifetime memberships, or annual memberships with installment plans. You can refund membership transactions only when applied toward paid-in-full annual memberships.

3. If necessary, enter additional search criteria to narrow down the results and click **Search**. Otherwise, under **Items available for refund**, select the transaction to refund and click **Continue**. You return to the Refunds page.
4. Select each checkbox associated with the items you want to refund. To select all items select the checkbox in the column header and clear the checkbox to deselect all items.

Note: When you refund a combination ticket in a sales order, you must refund all events and programs in the combination. You cannot refund the individual events or programs of a combination.

5. For preregistered events, verify that the registrant is associated with the correct ticket bar code. If the order contains more than one registrant for the same event and price type, in the **Registrant** column, use the drop-down to change the registrant as necessary.
6. In the **Refund** column, enter the amount you want to refund for each selected item. The refund amount defaults to the full refundable amount.

Note: The refund amount cannot exceed the amount allowed for the selected refund method. For example, if you refund more than \$50 in cash, the amount of a cash refund cannot exceed \$50.

7. Under **Payment details**, the payment method and amount of the refund appear. Under **Refund method**, select how the constituent receives the refund, such as Check or Gift certificate.
8. In the **Reason** field, select the reason for the refund.
9. In the **Comments** box, enter any additional information to explain the need for the refund.
10. For a transaction associated with a constituent, if you select to refund by check, select the constituent address to receive the refund.
11. Click **Complete refund**. The record of the refund appears. For information about the items on this record, see [Refund Record on page 281](#).

Find Items to Refund Screen

The table below explains the items on the Find Items to Refund screen. For information about how to access this screen, see [Refund Transactions on page 274](#).

Screen Item	Description
Constituent	Search for and select the constituent associated with the transaction to refund.
Minimum amount	To filter the search results by transaction amount, enter the minimum revenue amount of the transactions to return.
Maximum amount	To filter the search results by transaction amount, enter the maximum revenue amount of the transactions to return.
Type	Select the type of transaction to refund, such as Order, Donation, or Membership. To not filter the search results by transaction type, select All types.
Payment method	Select the payment method of the transaction to refund, such as Cash or Credit card. To not filter the search results by payment method, select All payment methods.
Source	Select the source of the transaction to refund, such as Daily Sales or Advance Sales. To not filter the search results by transaction source, select All sources.
Date	Select the date or date range of the transaction to refund, such as Today or This year. If you select Specific date, select the date of the transaction to refund. To not filter the search results by transaction date, select All dates.
Added by user	To refund a sales order, search for and select the user who added the order to the database.
Order #	To refund a sales order, search for and select the order to refund.

Screen Item	Description
Receipt email	To search for a sales order by email address, enter the email address that was used to send an itemized receipt from <i>Daily Sales</i> or <i>Advance Sales</i> . Note: Searching by email does not include online sales orders.
Search	After you enter the criteria of the transaction to refund, click this button. The program searches the database for transactions that meet the search criteria.
Clear	To remove all search criteria entered, click this button. The form returns to its default search criteria.
Items available for refund	The transactions that meet the entered search criteria and are eligible for refunds appear. To refund a transaction, select it in this grid and click Continue . The search results do not include membership transactions for recurring memberships, lifetime memberships, or annual memberships with installment plans. You can refund membership transactions only when applied toward paid-in-full annual memberships.

Refunds page

The table below explains the items on the Refunds page.

Screen Item	Description
Quick Search	
Name	In this column, the name of each item on an order appears, such as membership, event, or ticket.
Registrant	In this column, registrants associated with a preregistered program appear. When an order contains more than one registrant for the same event and price type, before you process the refund, ensure the registrant and bar code on the ticket match.
Bar code	In this column, the bar code associated with the preregistered event ticket appears.
Price	In this column, the original price for each item appears.
Discount	In this column, the amount of any discounts applied to each item appears.
Amount	In this column, the amount a patron paid for each item appears.

Screen Item	Description
Refund	In this column, the refund amount defaults to the amount paid for each item. However, you can adjust the refund amount as necessary.
Payment details	In the grid, the payment method and total amount of the refund appear. Select the refund to process for the transaction. In the Refund method column, select the payment method to use for the refund, such as Check or Cash.
Reason	Select the reason for the refund, such as Event canceled. From <i>Administration</i> , you can manage the Credit Reason code table to add or edit the entries for this field.
Comment	Enter any additional details about the refund.
Send check to	For a transaction associated with a constituent, if you select to issue the refund by check, this field appears. Select the constituent address to receive the refund.
Order total	In this field, the revenue amount of the original transaction appears.
Order discounts	In this field, the total amount of any discounts applied to the original transaction appears.
Tax refund amount	In this field, the refund amount of any taxes applied to the original transaction appears.
Refund total	In this field, the total amount of the refund appears, based on the selected items to refund and any taxes or discounts.

Back Office Refunds and the Close Drawer and Deposits

When a front office user refunds a transaction entered through the back office, such as an event registration or membership, the closed drawer will not include the refund and will appear out-of-balance by the refund amount. For a deposit created from an approved out-of-balance drawer, we recommend you adjust or remove the automatically generated deposit correction to account for the linked refund amount.

Tip: To issue refund checks that automatically appear in closed drawers and deposits, you can create an Other payment method such as "Refund - Checks." However, these refunds do not appear in the Refunds report, and you cannot manage their Sent status through the Recent Refunds widget. The Refunds report and Recent Refunds widget only include refunds added through the Create a refund screen.

Search for Refunds

To view or manage a refund, you can search for its record. The refund record provides detailed information such as the total amount refunded, the reason for the refund, and whether the transaction has been reconciled. Additionally, the record provides details about the credits, payment methods, and general ledger distributions of the refund. For more information about the items on the record, see [Refund Record on page 281](#).

Note: Group sale reservation refunds do not have refund records. To view information about a group sales refund, access the record of the refunded reservation.

To search for a refund record from *Sales*, click **Refund search**.

➤ Search for a refund

1. From *Sales*, click **Refund search**. The Refund search screen appears. For information about the items on this screen, see [Refund Search Screen on page 280](#).
2. Enter the criteria of the refund to view, such as details of the constituent, user, or transaction associated with the refund.

Note: In the criteria fields, you can enter “wildcard” characters to take the place of parts of the search phrase. Use the asterisk (*) or percent sign (%) to take the place of a group of characters and the question mark (?) or underscore (_) to take the place of an individual character. For example, to locate all refunds for patrons with a last name ending with the letters “son”, you can enter “*son” or “%son” in the name field, or for the last name Smith or Smyth, you can enter “Sm?th” or “Sm_th.”

3. Click **Search**. Under **Results**, the refunds that meet the search criteria appear.
4. To filter the refunds that appear under **Results**, select the date or date range of the refund to view.
5. Under **Results**, click the row of the refund to view. The refund record appears.
For information about the items on the record, see [Refund Record on page 281](#).

Refund Search Screen

The table below explains the items on the Refund Search screen. For information about how to access this screen, see [Search for Refunds on page 280](#).

Screen Item Description

Screen Item	Description
Patron name	Enter name of the patron who received the refund. You can enter a partial name or individual letters in this field. For example, if you enter “Sm”, all names beginning with the letters “Sm” appear. Also, the search process is not case-sensitive, so you can enter “Smith,” “smith,” and “SMITH” and get the same results.

Screen Item Description

Membership ID	<p>For a membership refund, enter the entire or partial ID of the membership associated with the refund.</p> <p>You can enter the entire ID or the beginning digits. For example, if you enter "1", all membership IDs beginning with the number 1 appear. If you enter "123", IDs beginning with these digits appear.</p>
Program name	For an order refund, enter the name of the program associated with the refund.
Event name	For an event registration refund, enter the name of the event associated with the refund.
Membership program	For a membership refund, enter the name of the membership program associated with the refund.
Designation	Enter the name of the designation associated with the refund.
User name	Select the user who processed the refund.
Match all criteria exactly	<p>If a search must match your criteria exactly, select this checkbox. An entry in a field returns only an exact match of the characters you enter. You can enter a first name and last name or a full or partial last name.</p> <p>When you select this checkbox, wildcard characters do not work and are instead used as regular characters. For example, an asterisk (*) or percent sign (%) is used literally, rather than as a replacement for a group of characters. Similarly, a question mark (?) or underscore (_) is no longer used as a replacement for one character.</p>
Include aliases	To include an alias in your search, select this checkbox. Aliases appear on the Names tab of the patron's constituent record.
Include nicknames	<p>To include a nickname in your search, select this checkbox. For example, to search for Robert Hernandez by his nickname "Bob", select the checkbox. You can now enter "Bob" in the First name field when searching for Robert.</p> <p>For an individual, the nickname appears on the Personal tab of the patron's constituent record.</p>
Dates	Select the date range of when the refund was processed. You can search by a specific date or date range. You can also search for refunds from today, yesterday, this week, this month or all dates.

Refund Record

When you create a refund, the program automatically creates a record of the refund. To view a record, you can search for the refund. For information about how to search for a refund, see [Search for Refunds on page 280](#)

On the record, you can view summary information about the refund such as the total amount refunded, the reason for the refund, its reconciliation status, and any comments entered. For a check refund, you

can view information about the check issued for the refund, such as its number and date. The refund record also includes multiple tabs with additional detail information.

- On the Credit Details tab, you can view the items or transaction refunded and any adjustments applied to the refund. The information that appears on this tab depends on the item refunded. From this tab, you can view the record of the refunded item for additional information.
- On the Sales Documents tab, you can view sales documents associated with the refund of a sales order, such as its itemized receipt. From this tab, you can print the sales documents as necessary.

Note: By default, the itemized receipt prints when you refund a sales order. The itemized receipt provides a record of all items refunded and includes all discounts, fees, and taxes applied during the original order. When you refund an order that contains a credit card payment, the default refund credit card receipt also prints and displays the amount refunded to the credit card. A customer copy and merchant copy print for both receipts. The merchant copies each provide a signature line that does not appear on the customer copies. Your organization should retain the signed merchant copies for your organization's records.

- On the Refund Methods tab, you can view information about the payment method used to refund a transaction to a constituent. Under **Refund methods**, you can view the method used, the amount, its deposit, and its post status. For a credit card refund, you can also view the status received from the **Blackbaud Payment Service**. From this tab, you can edit the details of a check refund or retry a failed credit card refund as necessary.
- On the GL Distributions tab, you can view the credit and debit distributions generated in the general ledger for the refund. Under **GL Distributions**, you can view the transaction type, account, amount, reference, and refund method associated with each distribution. On this tab, you can also view the distributions of any discounts and benefits associated with the refund.

To edit refund distributions, click **Edit distribution** in the action bar. The Edit GL distribution screen appears where you can edit the **Account** or **Reference** fields. For more information about how to edit GL distributions, see the *Revenue Guide* or the GL distributions section of the help file.

From the record, you can also edit the reason and comments entered for the refund as necessary.

Retry Credit Card Refunds

If a credit card refund fails, an error appears under **Refund summary** on the refund record, and a red X appears next to each failed credit card on the Refund Methods tab. Typically, a credit card refund fails due to an invalid or expired credit card or a loss of Internet connection. From the record of a failed credit card refund, you can attempt to retry the refund as necessary. On the Refund Methods tab, select the credit card to retry and click **Retry credit card** on the action bar.

If the credit card refund processes successfully, the red X changes to a green checkmark, and the error no longer appears under **Refund summary**.

If the refund fails again, we recommend you contact your business office.

Link or Unlink Deposits to Payments

You can link and unlink refunds to deposits as necessary. To successfully post a refund to the general ledger, you must link the refund to a deposit.

For information about how to link to a deposit, see the *Treasury Guide*.

Edit Refund Comments

When you create a refund, you can enter comments to provide additional information about the refund. After you create a refund, you can edit the comments as necessary.

➤ Edit comments on a refund

1. Access the record of the refund with the comments to edit. For information about how to access a refund record, see [Search for Refunds on page 280](#).
2. Under **Tasks**, click **Edit comment**. The Edit comment screen appears.
3. Edit the comments as necessary.
4. Click **Save**. You return to the refund record.

Edit the Refund Reason

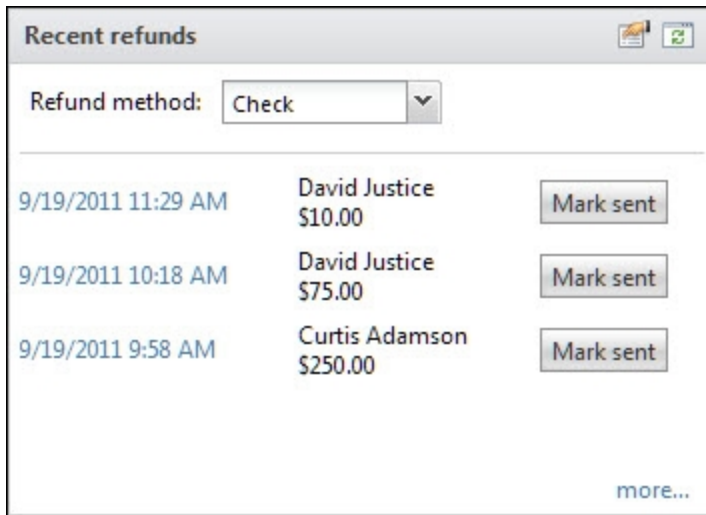
When you create a refund, you select a reason code to explain the need for the refund. After you add the refund, you can edit its reason code as necessary.

➤ Edit the reason for a refund

1. Access the record of the refund with the comments to edit. For information about how to access a refund record, see [Search for Refunds on page 280](#).
2. Under **Tasks**, click **Edit reason**. The Edit reason code screen appears.
3. Select the applicable reason for the refund.
4. Click **Save**. You return to the refund record.

Recent Refunds

From *Financials*, you can use the **Recent refunds** widget to analyze recent refund activity. This widget displays all refunds created during a selected time frame. For each refund, you can view the date and time it was added, the constituent who received the refund, its amount, and how the constituent received the refund. To view only refunds issued by a specific method, such as Credit card or Check, select the method in the **Refund method** field.



To view additional information about refund activity, such as the items refunded and check numbers, click **more**. The Refunds report appears. For information about this report, see the *Revenue Guide*.

For refunds by check, you can mark the refund as sent to indicate that your organization has issued the refund check for the constituent. You can configure the widget to select the date range of the refunds to display and whether to include check refunds marked as sent.

Warning: To issue a check refund, you can create an Other payment method, such as "Refunds - Checks". However, these refunds do not appear in the **Recent Refunds** widget. The widget displays only refunds added through the Create a refund screen. For information about how to create refunds, see [Refund Transactions on page 274](#).

➤ Configure the Recent Refunds widget

1. From *Financials*, select the Revenue tab.
2. Under **Recent refunds**, click **Settings**. The configuration options for the Recent refunds widget appear.
3. In the **Date** field, select the date range of the refunds to display on the widget, such as This week or Last year. To display all refunds regardless of date, select All dates. If you select Specific date, select the start and end dates of the refunds to display.
4. To display check refunds marked as sent, select **Include sent checks**.
5. Click **Save**. You return to the Recent refunds widget.

➤ Mark a check refund as sent

When your organization issues a check refund to a constituent, you can mark the refund as sent to track the check number and issue date.

1. From *Financials*, select the Revenue tab.
2. Under **Recent refunds**, for the check refund to mark as sent, click **Mark sent**. The Mark refund sent screen appears and displays the recipient, item, and amount associated with the refund.

Tip: To view only check refunds that have not been marked as sent, select to display only refunds with a method of Check and configure the widget to exclude sent checks. You can also adjust the date range of the refunds that appear as necessary. For information about the Recent refunds widget, see [Recent Refunds on page 283](#).

3. In the **Issue date** field, select the date your organization creates the refund check.
4. Enter the number of the check issued for the refund and any additional notes about the refund, such as whether the constituent receives the check in person or through the mail.
5. Click **Save**. You return to the Recent refunds widget.

Refunds for Group Sales Reservations

From the Group Sales Reservation page, you can add refunds to return money to your customers. You can refund the full payment until the reservation is checked-in, after check-in, you can only refund the overpaid amounts on reservations. For example, if a reservation has a balance of \$150 and a patron makes two \$100 payments, you can only refund the over paid amount of \$50.

Note: In the **Pricing** section of the Group Sales Reservation page, a **Refund** link appears if an overpayment is available for refund. However, before check-in you can refund anytime under the **Refunds** section.

➤ Add refunds for group sales reservation

1. From *Sales*, under **Daily tasks**, click **Group Sales**. The Group Sales page appears.
2. Select a reservation to refund. The Group Sales Reservation page appears.
3. In the **Refunds** section, click **Add**. The Refund Order screen appears.

Refund Order #10000289 Abc Learning Center -... X

Balance: \$210.00

Amount:

Refund information

Payment: ▼

You can only refund up to **\$56.00** of this payment.

Refund method: ▼

Reason:

Click 'Complete refund' to refund the amount to the selected refund method.

? Help

4. The **Balance** field displays the amount the patron still owns.
5. In the **Amount** field, enter the amount to refund.
6. In the **Payment** field, select the payment to refund. If a payment has already been refunded, the amount that you can refund appears under the drop-down.
7. In the **Refund method** field, select how to refund the money. The refund methods for your organization appear in the drop-down.
8. In the **Reason** field, select the reason for the refund. This information appears in the **Refund** section on the Group Sales Reservation page.
9. Click **Complete refund**. You return to the Group Sales Reservation page.

Sales Reports

Adjustable Discount Report	288
Average Hourly Sales Report	289
Daily Admission Report	291
Discount Report	293
Grouped by Discount	294
Grouped by User	295
Grouped by Program	296
Grouped by Membership Level	297
Grouped by Merchandise	298
Event Attendance Report	298
Fee Report	299
Group Sales Revenue Report	300
Itinerary Report	301
Location Availability Report	302
Marketing Survey Report	303
My Sales By Payment Method	304
Orders With Balance Due Report	305
Preregistered Program Roster	306
Program Revenue Report	307
Sales by Date Report	308
Sales By Membership Report	309
Sales By Payment Method Report	311
Sales By Price Type Report	312
Sales By Program Report	314
Sales Comparison Report	315
Deposit Summary Report	316
Close Drawer Report	317
Sales Report	319
Scheduled Event Ticket Detail Report	320

Tax Report 321

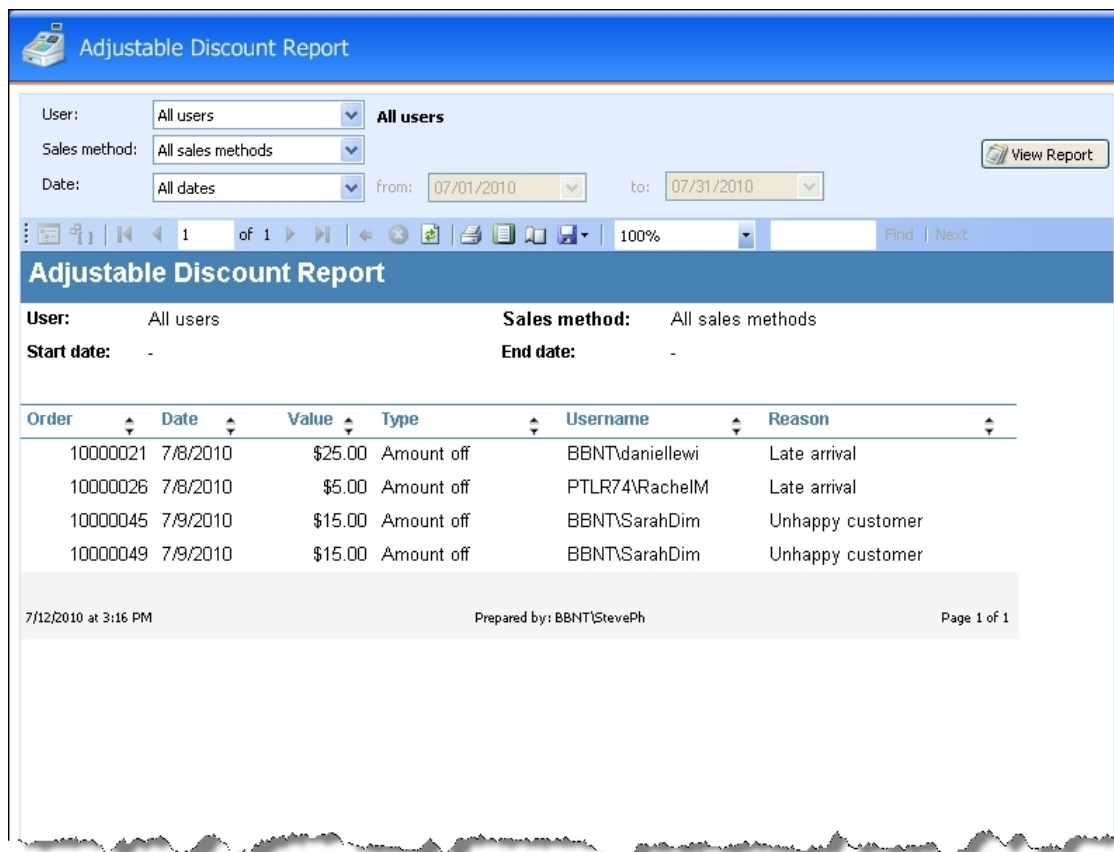
Ticket Availability Report 322

Zip code Report 323

There are a number of reports that are specifically used to gather and share information about orders and sales processes. You can run sales revenue reports to review actual amounts with the order payments entered each day. You can also determine which payment methods patrons most often use and which revenue categories generate the greatest percentage of income currently and over time. With reconciliation reports, you can reconcile cash drawers at the end of each shift as part of the close-day process.

Adjustable Discount Report

The Adjustable Discount report provides information about the use of adjustable discounts. You can view order information, discount value and type, users, and reason for the use of the discount. To access the report, from *Sales*, under **Reports**, click **Adjustable discount report**. The Adjustable Discount Report page appears.



From here, you select user, a sales method, and a date or date range. After you enter your criteria, click **View report**, to view the results.

Average Hourly Sales Report

The Average Hourly Sales Report provides historic sales data for orders and ticket sales based on the day of the week and time of day the sales occurred. You can view average hourly sales by day and average daily sales by hour.

With this report, your organization can identify the busiest sales times. You can then use this data to help schedule staff more effectively. To view this report, from *Sales*, click **Average hourly sales report** under **Reports**. The Average Hourly Sales Report page appears.

Average Hourly Sales Report

Program: All **All programs**
 Sales method: All methods **All sales methods**
 Filter by: Tickets Hourly items for: Monday - Sunday Show pivot table View Report
 Start time: 8:00 AM End time: 12:00 PM Show graphs
 Date: Specific date from: 03/01/2010 to: 03/31/2010

Average Hourly Sales Report

Sales method: All **Start date:** 3/1/2010 **End date:** 3/31/2010
Hourly tickets for: Monday - Sunday **Start time:** 8:00 AM **End time:** 12:00 PM
Program: All

Average tickets by day

Day	Average tickets
Mon	0
Tue	0
Wed	0
Thu	0
Fri	10
Sat	0
Sun	0

Average tickets by hour for Monday-Sunday

Time Period	Average tickets
8-9 AM	5
9-10 AM	0
10-11 AM	1
11-12 PM	5

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday	Hourly average
8 AM - 9 AM					5			1
9 AM - 10 AM								
10 AM - 11 AM					1			< 1
11 AM - 12 PM					5			1
Daily average					10			

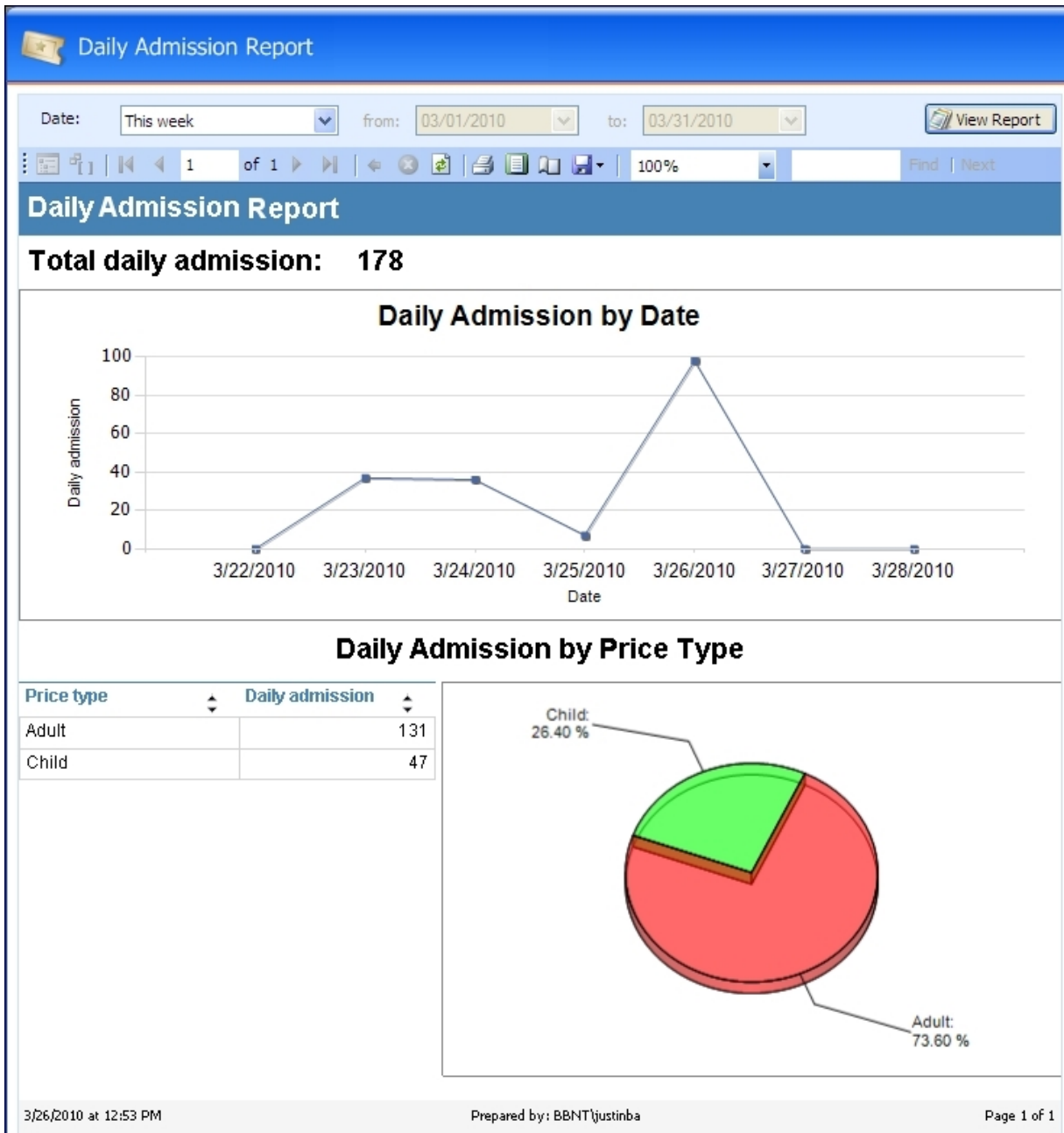
You can filter the report by program, sales method, tickets or orders, start time, end time, and date range. With the **Hourly items for** filter, you can select a specific day of the week or a various combination of days that constitute a week or weekend to show the average daily sales by hour for the selected day or days. With the **Filter by** field, you can choose whether to filter the report by the total number of orders or the total number of tickets in orders. For example, if a party of 5 came and paid together, that would represent 5 tickets, but only 1 order.

You can also display graphs and pivot tables of the report data by selecting the appropriate options.

Daily Admission Report

This report provides a graphical view of the daily admissions sold for a specified date or period of time. It also provides a view of daily admissions sold by price type. The price type data includes the specific number of admissions sold per price type and the overall percentage of admissions sold for each type.

To view this report, from *Sales*, click **Daily admission report** under **Reports**. The Daily Admissions Report page appears.



You make selections in the **Date** field to determine the period of time for which the daily admission sales information is displayed. By default, the **Date** field is set to "This week." After you select the date breakdown options, click **View Report**.

Note: Group sales check-ins are included in this report if patrons are checked in during the specified date range.

Discount Report

The Discount Report displays the number of times a discount was used, the total value of the discounts, and the users who processed the discounts. It also includes any promotional codes used for a discount. You can use the various filters available to get a more customized and detailed report. You can filter the report by criteria such as user name, discount name, sales method, and discount application method. You can also set a date range and group by user, discount, program, membership level, or merchandise. To include discounts that were refunded in the report, select **Include refunded discounts**.

Note: When you group by Program, Membership level, or Merchandise, the report excludes order discounts. These views only include discounts for individual items.

To view this report, from *Sales*, click **Discount Report** under **Reports**. The Discount Report page appears. After you apply filters, click **View report**.

The report totals and percentages are calculated based on the filtered results. For example, if you run the report with no filters, the totals and percentages displayed are all dates, discounts, and users. If you run the report with filters, the totals and percentages displayed depends on the results of the applied filters.

Note: Because decimal amounts are rounded, you may notice some minor inaccuracies in totals. For example, $3/14 = .21428 = 21.428\%$ which rounds to 21.43%.

Grouped by Discount

Discount Report					
Sales method:	All sales methods	Application method:	All	User:	All users
Discount:	All discounts	Group by:	Discount	Include refunded discounts:	No
Start date:	-	End date:	-		
Discount	Quantity Redeemed	% of Total Quantity	Value Redeemed	% of Total Value	
AA 50% off holiday promo	1	0.16%	\$6.00	0.13%	
SANTA	1	0.16%	\$6.00	0.13%	
AAA	367	59.29%	\$1,614.30	35.33%	
Adjustable discount	4	0.65%	\$33.00	0.72%	
Applied tickets	3	0.48%	\$56.00	1.23%	
BOGO	227	36.67%	\$2,712.00	59.36%	
BOGO	223	36.03%	\$2,676.00	58.57%	
BOGO 100% off 1 Adult	1	0.16%	\$12.00	0.26%	
Code promotion	2	0.32%	\$10.00	0.22%	
A1A	2	0.32%	\$10.00	0.22%	
General - Order	2	0.32%	\$5.50	0.12%	
Neighbor referral	4	0.65%	\$28.00	0.61%	
Z \$3 radio promo	3	0.48%	\$9.00	0.20%	
CHUCKFM	3	0.48%	\$9.00	0.20%	
Grand total:	619	100.00%	\$4,568.80	100.00%	

Promotional code

Grouped by User

Discount Report					
Sales method:	All sales methods	Application method:	All	User:	All users
Discount:	All discounts	Group by:	User	Include refunded discounts:	No
Start date:	-	End date:	-		
User	Discount	Quantity Redeemed	% of Total Quantity	Value Redeemed	% of Total Value
Jessica Christ		5	0.81%	\$27.50	0.60%
	BOGO	1	0.16%	\$12.00	0.26%
	Code promotion	2	0.32%	\$10.00	0.22%
	A1A	2	0.32%	\$10.00	0.22%
	General - Order	2	0.32%	\$5.50	0.12%
Jonathon Leeke		7	1.13%	\$61.00	1.34%
	Adjustable discount	4	0.65%	\$33.00	0.72%
	Z \$3 radio promo	3	0.48%	\$9.00	0.20%
	CHUCKFM	3	0.48%	\$9.00	0.20%
Juliana Lawson		7	1.13%	\$38.30	0.84%
	A General - Order	1	0.16%	\$2.00	0.04%
	Max dis	1	0.14%	\$1.00	0.03%

Grouped by Program

Discount Report					
Sales method:	All sales methods	Application method:	All	User:	All users
Discount:	All discounts	Group by:	Program	Include refunded discounts:	No
Start date:	-	End date:	-		
Note:	Order discounts are excluded when the report is grouped by Program, Membership level, or Merchandise.				
Program	Discount	Quantity Redeemed	% of Total Quantity	Value Redeemed	% of Total Value
Admission		231	99.14%	\$2,733.00	99.93%
	BOGO	227	97.42%	\$2,712.00	99.16%
	BOGO	223	95.71%	\$2,676.00	97.84%
	Z \$3 radio promo	3	1.29%	\$9.00	0.33%
	CHUCKFM	3	1.29%	\$9.00	0.33%
Noah's Ark		2	0.86%	\$2.00	0.07%
	A BOGO \$1 off same program w/ code	2	0.86%	\$2.00	0.07%
	FALL20	2	0.86%	\$2.00	0.07%
	Grand total:	233	100.00%	\$2,735.00	100.00%

Grouped by Membership Level

Discount Report					
Sales method:	All sales methods	Application method:	All	User:	All users
Discount:	All discounts	Group by:	Membership level	Include refunded discounts:	No
Start date:	-	End date:	-		
Note:	Order discounts are excluded when the report is grouped by Program, Membership level, or Merchandise.				
Membership	Discount	Quantity Redeemed	% of Total Quantity	Value Redeemed	% of Total Value
Berry Membership		2	22.22%	\$10.00	10.64%
Ground		2	22.22%	\$10.00	10.64%
	Code promotion	2	22.22%	\$10.00	10.64%
	A1A	2	22.22%	\$10.00	10.64%
Discount Membership		1	11.11%	\$7.00	7.45%
Discounted		1	11.11%	\$7.00	7.45%
	Neighbor referral	1	11.11%	\$7.00	7.45%
Multi Level Multi Term Membership		2	22.22%	\$19.00	20.21%
LevelA		2	22.22%	\$19.00	20.21%
	Applied tickets	1	11.11%	\$12.00	12.77%
	Neighbor referral	1	11.11%	\$7.00	7.45%
	Grand total:	9	100.00%	\$94.00	100.00%

Grouped by Merchandise

Discount Report					
Sales method:	All sales methods	Application method:	All	User:	All users
Discount:	All discounts	Group by:	Merchandise	Include refunded discounts:	No
Start date:	-	End date:	-		
Note:	Order discounts are excluded when the report is grouped by Program, Membership level, or Merchandise.				
Merchandise	Discount	Quantity Redeemed	% of Total Quantity	Value Redeemed	% of Total Value
Apparel		2	100.00%	\$5.50	100.00%
B Boots		1	50.00%	\$1.00	18.18%
	A Merchandise Only	1	50.00%	\$1.00	18.18%
Hoodie		1	50.00%	\$4.50	81.82%
	15% Clothing	1	50.00%	\$4.50	81.82%
	15FALL	1	50.00%	\$4.50	81.82%
	Grand total:	2	100.00%	\$5.50	100.00%

Event Attendance Report

The Event Attendance Report displays the attendance details of your patrons. The details include information such as the number of attendees, the number of tickets scanned, and the number of tickets sold during a selected time period. This report is useful if you want to know how many attendees came to each event based on event date and time.

Note: Daily admission sold and scanned counts are based on the selected date range selected. However, scanned counts for all other events, except special events, are over the life time of the event.

You can filter the report by event type such as special events or scheduled events, and group by event, price type, or date. To view this report, from *Sales*, click **Event attendance** under **Reports**. The Event Attendance page appears. After you select your filters, click **View report**.

Note: Dashes (---) indicate the number associated is not applicable. For example, the number of tickets scanned is not applicable to special events.

Event Attendance

Event type: All
 Group by: Event
 Date: This Week From: 7/9/2012 To: 7/15/2012 [View report](#)

1 of 1 100% Find | Next

Event Attendance Report

Event type: All Start date: 7/9/2012 End date: 7/15/2012 Group by: Event

Event	Date	Time	Marked attended	Available	Scanned	Sold
Admission			---	---	25	37
Water training			---	2050	0	0
Counting Crows Reunion			---	175	0	0
Deep Space Adventure: The Searcher			---	3498	1	2
Ghost Tour			---	6994	6	6

Note: The **Number attending** column displays the number of attendees for each event. However, for preregistered program events, the column displays the number attended and number registered respectively.

To view the attendees for a scheduled event, click the time of the event and for special events, click the date for the event. The Scheduled Event Ticket Detail report appears. For information about this report, see [Scheduled Event Ticket Detail Report on page 320](#). If you click a time for a preregistered event the Preregistered Program Roster report appears. For information about this report, see [Preregistered Program Roster on page 306](#).

Fee Report

The Fee report provides information about how much revenue is made from fees for a given period of time. To access the report, from *Sales*, under **Reports**, click **Fee report**. The Fee Report page appears.

Fee Report

Fee: All fees **All fees**

Sales method: All sales methods

Date: All dates from: 07/01/2010 to: 07/31/2010 [View Report](#)

1 of 1 100% Find Next

Fee Report

Fee: All fees Sales method: All sales methods

Start date: - End date: -

Fee name	Amount	Applies to	Total collected
Promotional fee	2.00%	Item	\$5.00
Sea Life Maintenance fee	\$1.00	Item	\$51.00
Total			\$56.00

7/12/2010 at 3:49 PM Prepared by: BBNT\StevePh Page 1 of 1

From here, you select a sales method, a date or date range, and a fee type. After you enter your criteria, click **View report**, to view the results.

Group Sales Revenue Report

From *Sales*, click **Group sales revenue** under **Reports**. The Group Sales Revenue report provides revenue information about your group sales reservations. On this report, you can view summary information such as order totals, refunds, and balances owed. You can also view information about individual reservations such as the arrival date, number of visitors, order total, and paid amount. To view more details about a reservation, click its link under **Reservation**.

Group Sales Revenue

Arrival Date: From: To: Group type: All [No group type] Interactive Tour

Show only reservations with outstanding balances
 Show only reservations with no payments
 Include cancelled reservations

1 of 1 100% Find | Next

Group Sales Revenue Report

From: 1/1/2013 To: 1/31/2013 Group Type: All

Revenue summary

Order Totals	Total Paid	Discounts	Refunds	Balance (you owe)	Balance (they owe)
\$814.00	\$970.00	\$10.00	\$135.00	(\$21.00)	\$0.00

Reservation details

Reservation	Arrival date	Visitors	Order total	Paid	Discounts	Refund	Balance
Adams	1/2/2013	10	\$70.00	\$115.00	\$0.00	\$45.00	\$0.00
Abrahms	1/3/2013	10	\$100.00	\$120.00	\$0.00	\$20.00	\$0.00
Allen	1/7/2013	10	\$100.00	\$135.00	\$0.00	\$35.00	\$0.00

To limit the group sales reservations that appear in the report, you set filters such as arrival date and group type. After you set your filters, click **View report**. The report displays the reservations that meet your criteria.

Itinerary Report

The Itinerary Report provides a printable schedule you can give to groups when they arrive at your organization and check in. This document provides a list of each program and custom item that the group is scheduled to attend during their visit, along with the times and locations for each.

From the Group check in page, you can view and print itinerary reports for any group currently scheduled to visit. To view the itinerary report, select a group in the **Reservations** grid and click **View Report**. To print the Itinerary Report, click **Print** on the toolbar.

Itinerary Report

Reservation: ABC Learning Center - Sprague

Itinerary: (All) Include resources [View Report](#)

1 of 2 | 100% | Find | Next

ABC Learning Center - Sprague

Gibson Class - 19 visitors
December 17, 2009

Time	Item	Resource	Location
9:00 AM - 9:30 AM	Sea Turtles Tank Tour		Sea Turtle Tank
12:00 PM - 1:30 PM	Lunch		Brooks Dining Hall

Additional resources

Resource	Quantity	Assigned to
Docent	1	

12/8/2009 at 9:27 AM Prepared by: BBNF@avepl

Tip: You do not have to check a group in to view and print the Itinerary Report. You can also view and print the report from each individual group reservation record and from *Sales*. From the reservation record or *Sales* page, under **Reports**, click **Itinerary report**. You can also view and print this report from the Group Sales page.

By default, the report includes all itineraries for the selected group reservation. To view only a specific itinerary, select it in the **Itinerary** field. To include any resources in the report that are booked for the group, select **Include resources**. To apply the filters and view the updated report, click **View Report**.




If needed, you can also view itinerary reports for other group reservations. To search for another group reservation, in the **Reservation** field, click the binoculars.

Location Availability Report

With the Location Availability report, you can check the availability of locations for program events and special fundraising events during a specific time period. When you check the availability, you can view locations that are either available or unavailable for the date or date range entered. To view the Location Availability report from *Sales*, click **Location availability** under **Reports**. From *Events*, click **Locations** and then click **Location availability** under **Reports** on the Locations page.

Tip: The Location Availability report is intended as a reference when you plan events or check the availability of events. To print the report, use your browser's print capability.

Location Availability

(7) **Filters**   

Select All Unselect All

Brooks Dining Hall
 Campus Center Ballroom
 Carolina Tennis Center
 Central Gardens
 ...

Availability: Available
 Date: Specific date

From: 6/28/2012 From: 12:00:00 AM
 To: 6/30/2012 To: 11:59:59 PM

Location	Program/Event	Date	Start Time	End Time	Used	Available	Event Capacity	Location Ca.
Beachside Hotel								
Beachside Hotel		6/28/2012	12:00:00 AM	11:59:59 PM	0	50	50	50
Beachside Hotel		6/29/2012	12:00:00 AM	4:00:00 PM	0	50	50	50
Beachside Hotel		6/29/2012	6:00:00 PM	11:59:59 PM	0	50	50	50
Beachside Hotel		6/30/2012	12:00:00 AM	11:59:59 PM	0	50	50	50
Central Gardens								
Central Gardens		6/28/2012	12:00:00 AM	11:59:59 PM	0	1500	1500	1500

To generate the report, click **Filters** and select the criteria of the locations and dates to check for availability.

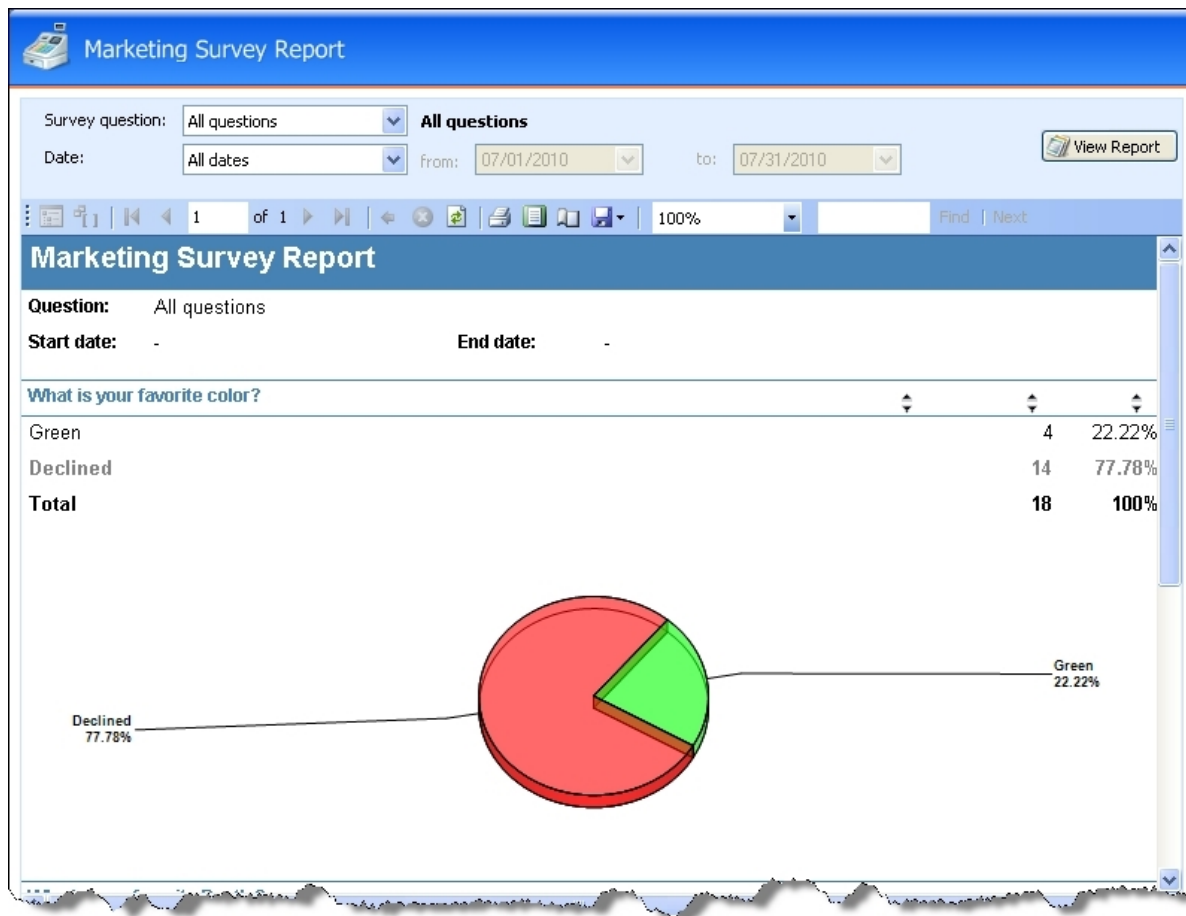
- Select the event locations to check for availability.
- Select whether to view when the locations are available or unavailable.
- In the **Date** field, select the date or date range to check.

When you click **Apply**, the availability of the selected locations for the specified time period appears.

- If you select to view locations that are available during the time period, you can view the date and times each location is open and the overall capacity of the location.
- If you select to view locations that are unavailable during the time period, you can view the events at each location, the date and times for each event, the overall capacity of the location and each event, and the capacity remaining for the event.
- If two or more events are scheduled for the same time, at the same location, they will appear in italics to show the conflict.

Marketing Survey Report

The Marketing Survey report provides information about the responses to the survey questions. To access the report, from *Sales*, under **Reports**, click **Marketing survey report**. The Marketing Survey report page appears.



From here, you select a survey question and a date or date range. After you enter your criteria, click **View report**, to view the results. The report displays the responses by question.

My Sales By Payment Method

With the My Sales By Payment Method report, you can view details for sales you made during the current day or a specific date range. Only sales made while you are logged in appear in the report results. To view this report, from *Sales*, click **My sales by payment method** under **Reports**. The My Sales By Payment Method page appears.

My Sales By Payment Method Report

Include: Payment details

Date: Today from 12/08/2008 to 12/08/2009 Refresh

1 of 1 100% Find | Next

My Sales by Payment Method Report for Steve Pham

Include: Summary

Start date: 12/8/2009 End date: 12/8/2009

Count	Payment method	Type	Amount
1	Cash		\$56.00
1	Credit card		\$269.58
		1 Discover	\$269.58
2			\$325.58

For each payment method a patron uses, such as cash or credit card, you can view the number of payments and the total amount paid. To view details about each payment organized by payment method, select **Include Payment details** and click **Refresh**. The report results display the order number, time, amount, and the name of the patron who placed the order. To review an order, click the order number to access the completed order page.

Orders With Balance Due Report

The Orders With Balance Due Report provides a way to see all sales orders in the system that have not been fully paid or that have been overpaid. Overpayments are displayed in parentheses. When you run the report, you can choose to include group sales reservations, as well as pay on arrival orders. If you select **Include group sales reservations**, you also have the option to include canceled reservations.

Additionally, you can exclude orders from this report based on date. To view only orders with a balance that were placed after a specific date, in the **Exclude orders before** field, select a date. To apply the filters and view the updated report, click **View Report**.

Orders With Balance Due Report

Include group sales reservations Exclude orders before: 04/06/2010
 Include cancelled reservations
 Include pay on arrival orders

[View Report](#)

1 of 1 100% Find | Next

Orders with balance due

Reservations with deposit due

Order #	Patron	Visit Date	Deposit Due	Days Past Due	Deposit Balance
10000015	AAA Concrete	4/23/2010	4/14/2010	2	\$2.00
10000018	Robert C. Hernandez	4/16/2010	4/14/2010	2	\$10.00
10000019	William Jacobs	4/16/2010	4/16/2010	0	\$40.00

Reservations with order balance due

Order #	Patron	Visit Date	Order Balance Due	Days Past Due	Order Balance
10000015	AAA Concrete	4/23/2010	4/14/2010	2	\$7.00
10000018	Robert C. Hernandez	4/16/2010	4/15/2010	1	\$51.00
10000019	William Jacobs	4/16/2010	4/16/2010	0	\$174.00
10000021	AAA Concrete	4/16/2010	4/16/2010	0	(\$150.00)

Pay on arrival orders

Order #	Patron	Order Date	Order Balance
10000013	Robert C. Hernandez	4/16/2010	\$15.73

4/16/2010 at 3:23 PM Prepared by: VM-PEB-2003\GraceC Page 1 of 1

This report includes three sections depending on the options you have selected and the orders in your database.

- The **Reservations with deposit due** section displays group sales orders that have not yet paid their deposit. If the deposit is past due, the number of days past due is displayed. Additionally, the order number, patron name, visit date, deposit due date, and deposit balance amount are displayed.
- The **Reservations with order balance due** section displays group sales orders that have an unpaid balance or an overpayment. If the balance is past due, the number of days past due is displayed. Additionally, the order number, patron name, visit date, order balance due date, and balance amount are displayed.
- The **Pay on arrival orders** section displays sales orders that were processed with the pay on arrival option and have an unpaid balance or an overpayment. The order number, patron name, order date, and balance amount are displayed.

Preregistered Program Roster

The Preregistered Program Roster report is intended to be a printable list you can use to track who has attended an event that requires registration. You can use this report as part of a manual check-in process where you verify the registrants and their preference selections upon arrival. You can then mark them as attended on the report. After the event, with the attendance information, you can access

the Registrants tab on the event record and mark the corresponding registrants as attended or not attended.

If event restrictions have been added to a patron's constituent record, they are listed in the **Notes** column on this report. For example, if a constituent is allergic to nuts, that allergy can be added to the Personal tab of the patron's constituent record.

By default, when you access the report all preregistered programs are included. To view only a specific preregistered program, select it in the **Program** field and select the date parameters in the **Date** fields. Additionally, with the **Sort by** field, you can sort the report by first name or last name. Also, click **Include registration information** to view responses to registration questions. You can also select to view the report in a detail grid or summary, as well as, the responses to specific sections. To apply the filters and view the updated report, click **View report**.

Note: You can also run this report when viewing a specific preregistered event record. In this case, the **Program**, **Date**, and **Sort by filters** are not displayed. Instead, the report provides data only for the event you are viewing.

Program Revenue Report

This report displays the revenue and number of tickets sold for scheduled and daily program events by event date.

In the **Event date** field, select the date range of orders to include. For scheduled events, the event date is when the program event occurred. For daily admission events, the event date is when the ticket was purchased.

To exclude incomplete orders (pending group sales or pay on arrival advance sales), select **Include completed orders only**. In the **Sold date** field, select the date(s) the tickets were sold. The **Sold date** determines which sales and refunds are included.

For example, you have an event scheduled for January:

- In November, you sell \$100 in tickets and refund \$0.
- In December, you sell \$0 in tickets and refund \$100.

When you run the report and filter by November in the **Sold date** field, the revenue details for the event are: Gross = \$100, Refunds = \$0, and Net = \$100.

When you filter by December in the **Sold date** field, the revenue details for the event are: Gross = \$0, Refunds = \$100, and Net = (\$100).

Note: For group sales, refunds do not appear in the **Refunds** column because these refunds are applied to the payment, not the tickets. However, the **Gross** and **Net** columns do reflect the refund amounts.

Note: The **Sold** column displays the number of tickets sold. For tickets that are refunded or partially refunded, the **Sold** column is adjusted only if those tickets are added back to the inventory.

To include incomplete orders, select **Include completed and projected orders (Pay on Arrival)**.

You can filter the report to include all programs, a specific program, or a selected group of programs and choose which sales methods to include. You can also group the results by event and/or price type.

Program revenue

Event date: This month From: 10/1/2015 To: 10/31/2015

Include completed orders only

Sold date: All dates From: mm/dd/yyyy To: mm/dd/yyyy

Include completed and projected orders (Pay on Arrival) [View report](#)

Program: Selected programs ProgramSelection (Ad-hoc Query)

Group by: Event Sales methods: All sources Advance sales Daily sales Online sales

1 of 1 Find | Next

Program Revenue Report

Event start date: 10/1/2015 Event end date: 10/31/2015 Program: ProgramSelection (Ad-hoc Query)

Sold start date: - Sold end date: - Source: All sources

Include completed orders only: Yes Group by: Event

Include projected and completed orders: No

Revenue summary

	Gross	Discounts	Refunds	Net
	\$252.00	\$59.00	\$15.00	\$178.00

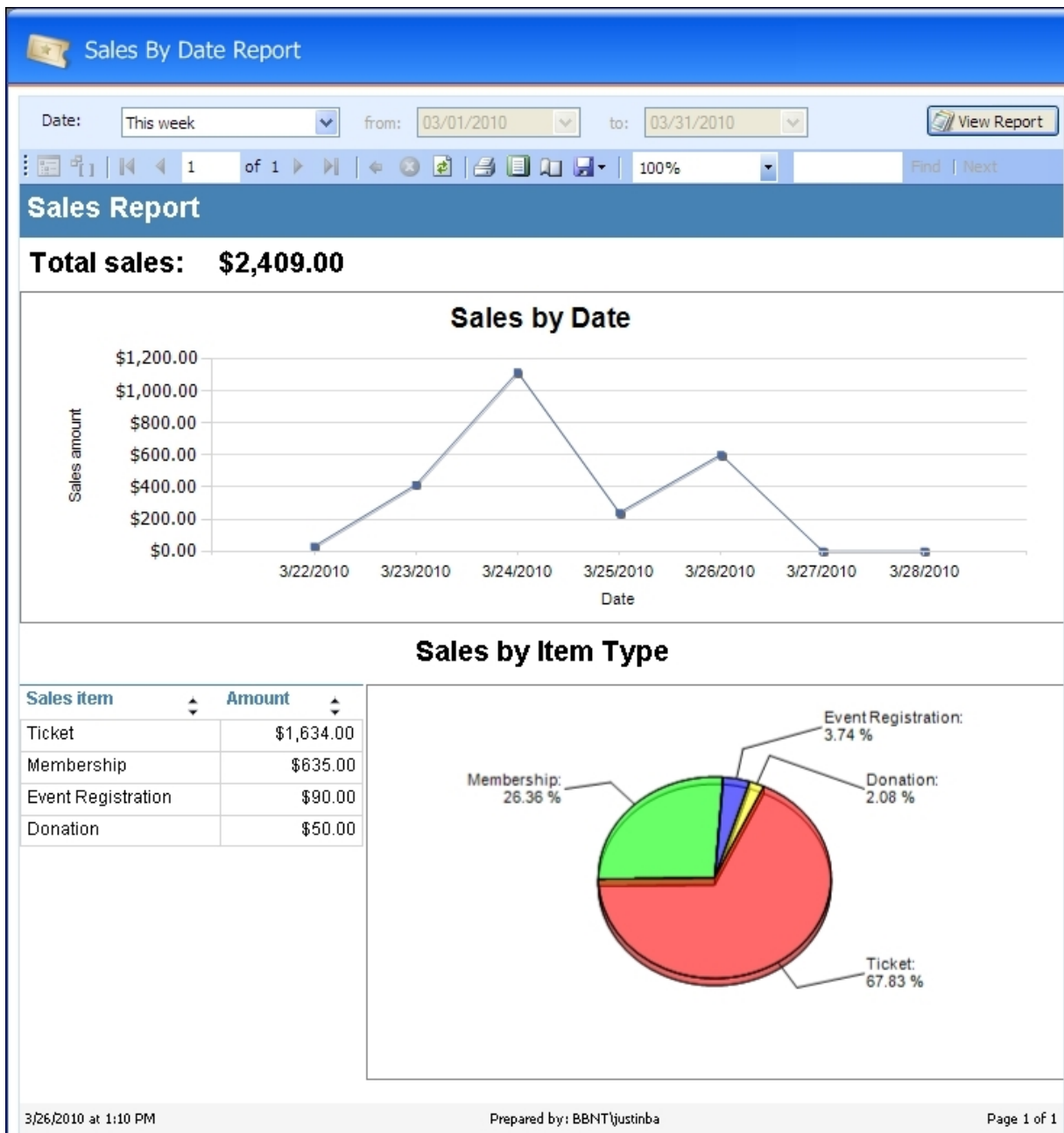
Revenue details

Category/program/event	Sold	Gross	Discounts	Refunds	Net	Percent of net
(No category)	28	\$92.00	\$25.00	\$5.00	\$62.00	34.83%
Daily Admission	25	\$64.00	\$25.00	\$5.00	\$34.00	19.10%
Daily Admission Program	3	\$28.00	\$0.00	\$0.00	\$28.00	15.73%
Lecture	35	\$160.00	\$34.00	\$10.00	\$116.00	65.17%
Lecture series	35	\$160.00	\$34.00	\$10.00	\$116.00	65.17%
Program 10/8/2015 - 6:00 PM	26	\$100.00	\$30.00	\$10.00	\$60.00	33.71%
Program 10/9/2015 - 6:00 PM	9	\$60.00	\$4.00	\$0.00	\$56.00	31.46%

Sales by Date Report

This report provides a graphical view of the total sales for a specified date or period of time. The total sales information displayed includes items sold through advance, daily, online, and group sales. The Dashboard Sales Report also provides a view of the item types sold during the designated period of time along with the specific amount sold of each type. Tickets, memberships, donations, fees, facility rentals, and event registrations are included in this report.

To view this report, from *Tickets*, click **Sales report** under **Dashboards**. The Dashboard Sales Report page appears.



You make selections in the **Date** field to determine the period of time for which total sales information is displayed. By default, the **Date** field is set to "This week." After you select the date breakdown options, click **View Report**.

Sales By Membership Report

The Sales by Membership Report displays the sales revenue your organization has generated specifically from members. The report is organized by membership program and level, such as Family

or Individual, so you can quickly compare the percentage of income generated from each. You can use the date parameters in the Membership Sales Report to create a year-to-date report of sales revenue. To view this report, from *Sales* click **Sales by membership report** under **Reports**.

Sales by Membership

Membership program: Aquarium

Report type: Detailed

Sales method: All Show graph

Date: This Month From: 2/1/2012 To: 2/29/2012

[View report](#)

Sales by Membership Report

Membership program: Aquarium

Sales method: All sales methods Report type: Detailed Graph: Shown

Start date: 2/1/2012 End date: 2/29/2012

Revenue summary

Membership level	Gross	Discounts	Refunds	Net	Percent of net
Standard	\$110.00	\$0.00	\$0.00	\$110.00	9.56%
Gold	\$200.00	\$0.00	\$0.00	\$200.00	17.38%
Non-members	\$1,816.00	\$20.00	\$955.00	\$841.00	73.07%
Total	\$2,126.00	\$20.00	\$955.00	\$1,151.00	100.00%

Percent of net revenue

A 3D pie chart titled 'Percent of net revenue' showing the distribution of net revenue by membership level. The largest slice is blue, representing Non-members at 73.07%. The next largest is green, representing Gold at 17.38%. The smallest is red, representing Standard at 9.56%.

To generate the report, select the criteria of the information to analyze and click **View report**.

- In the **Membership program** field, select the membership program to analyze.
- In the **Report type** field, select whether to view the report results in a Summary or Detailed format.
- The Summary view displays a high-level view of revenue, organized by membership level, and divided by revenue category, such as Admissions, Memberships, or Donations.
- The Detailed view displays information about each membership level within the selected membership program, and the items associated with each revenue category. For example, under each membership level, details for each program appear under the Admissions category, and information about each designation for which a donation was made appears under Donations.

- To include a graphical display of the results, select **Show graph**.
- In the **Sales method** and **Date** fields, select whether to include all or specific sales methods during a selected date range.

After you generate the report, the **Revenue summary** section displays the sales revenue for each membership level, as well as the total revenue, all adjustments by type, and the net revenue amount. The **Revenue details** section is divided by membership level. For each level, you can view the amount of revenue received based on category such as memberships and membership add-ons; an item count for each; the total amount before adjustments; and the percentage of total income each represents. You can also view details about any adjustments made and the total adjusted amount.

Note: The Sales by Membership Report provides details of all sales from patrons of other membership programs, as well as patrons who are not part of any membership program. This information appears as **Non-members**.

If refunds exist within the date range of the report, the total amount refunded appears in the **Refunds** column. The **Quantity** column reflects the number of tickets sold minus the number of tickets refunded.

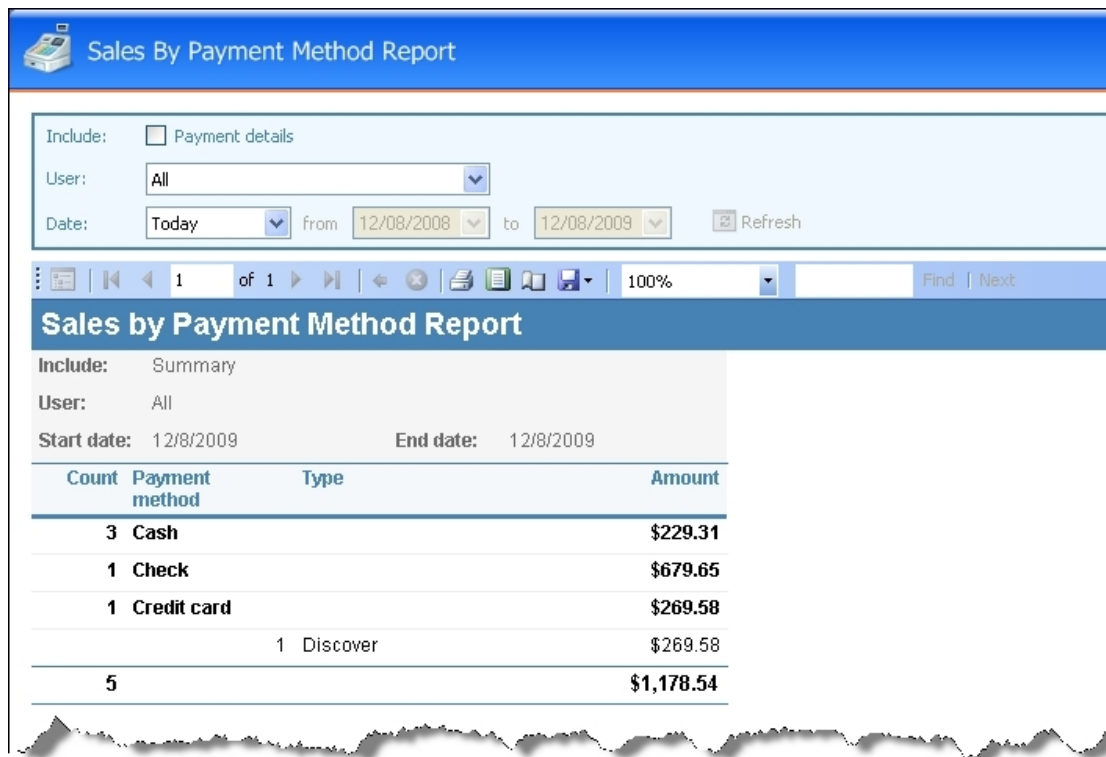
Note: If more memberships were refunded than sold within a date range, a negative quantity appears. For example, if you run a report for May 1 through May 8, and no memberships were sold but two were refunded, "-2" appears.

When applicable, fees, taxes, and discounts appear in their respective categories.

- Each fee type applied to the order or item appears in the Fees category. For example, if you apply a delivery fee and a handling fee, a row appears for each fee.
- Each tax type applied to the order or item appears in the Tax category. For example, if a sales tax is applied, a row appears for the tax.
- Any discounts included in the report appear in the **Discounts** column.

Sales By Payment Method Report

If you have proper security permissions, you can run a Sales By Payment Method report. With this report, you can view details for sales made by all or selected ticket sellers during the current day or a specific date range. To view this report, from *Sales*, click **Sales by payment method** under **Reports**. The Sales By Payment Method page appears.



Sales By Payment Method Report

Include: Payment details

User: All

Date: Today from 12/08/2008 to 12/08/2009 Refresh

1 of 1 100% Find | Next

Sales by Payment Method Report

Include: Summary

User: All

Start date: 12/8/2009 End date: 12/8/2009

Count	Payment method	Type	Amount
3	Cash		\$229.31
1	Check		\$679.65
1	Credit card		\$269.58
		1 Discover	\$269.58
5			\$1,178.54

For each payment method a patron uses, such as cash or credit card, you can view the number of payments and the total amount paid. From **Include**, you can select to include sales made by a specific ticket seller or all sellers. To view details about each payment organized first by ticket seller, then by payment method, select **Include payment details** and click **Refresh**. The report results display the order number, time, amount, and the name of the patron who placed the order. To review an order, click the order number to access the order page.

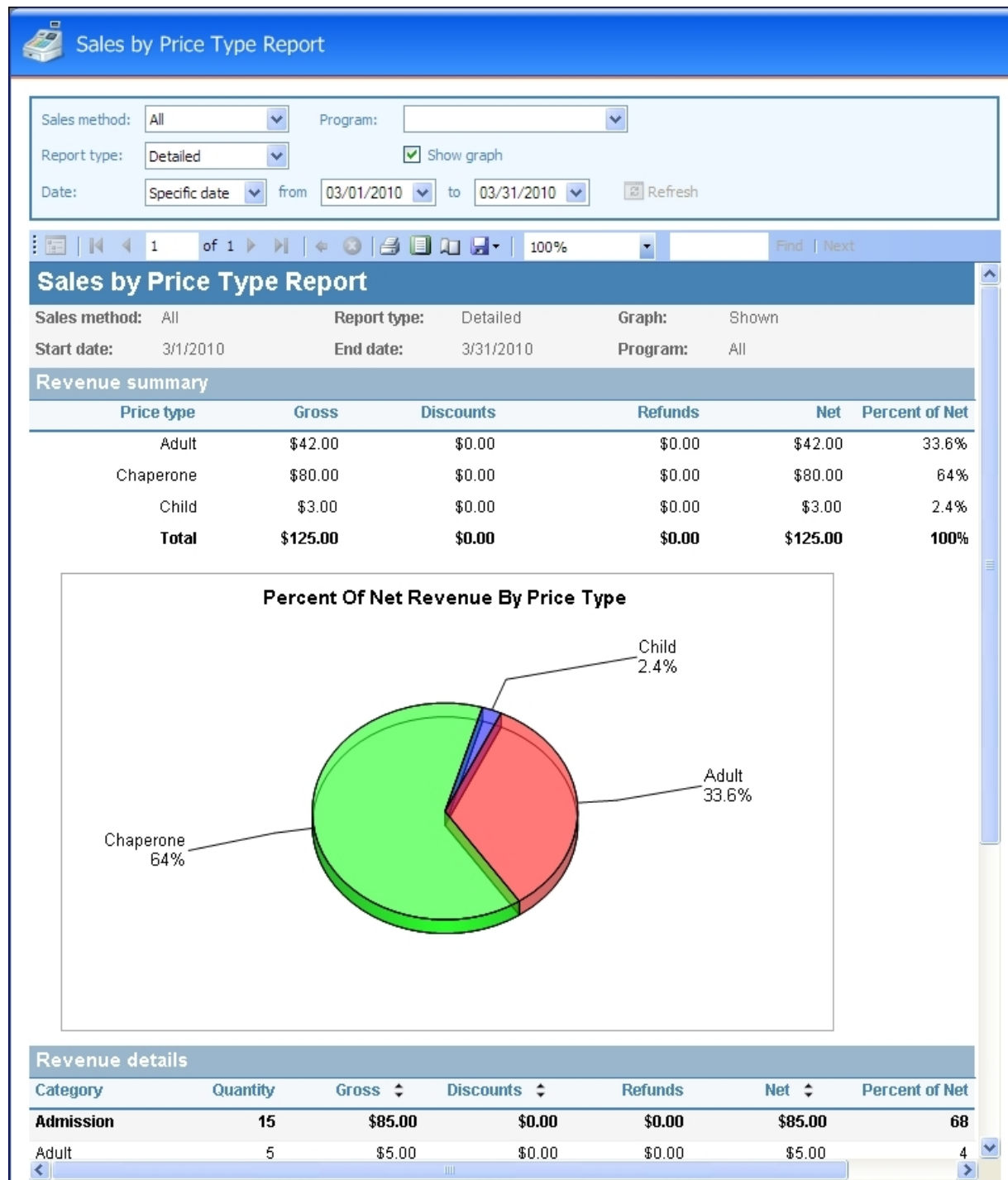
Sales By Price Type Report

With the Sales By Price Type Report, you see summary revenue data for each ticket price type you have sold across all programs for a specified period of time. This report also provides a detailed breakdown of revenue data for each ticket price type sold for each program you offer. For example, you can see the total number of Adult, Child, and Senior tickets sold across all programs, as well as the number of tickets sold per price type for each program. This allows you to quickly compare the percentage of revenue generated from each price type and compare the demographics of those who attend each program or event.

You can use the date parameters in the Sales By Price Type Report to create a year-to-date report of sales revenue. To view this report, from *Sales* click **Sales by price type report** under **Reports**. The Sales By Price Type page appears.

In the **Sales method** field, select whether to include all ticket sales or only those sold through a specific sales method. In the **Report type** field select either "Summary" or "Detailed" to determine the report output. The summary shows a high-level view of revenue, organized by price type only. The detailed view also displays sales data by price type but it also includes program categories to show

price type ticket data for each specific program. To include a graphical display of the results, select **Show graph** and click **Refresh**.



The Revenue Summary section shows the sales revenue for each price type, as well as the total revenue, all adjustments by type, and the net revenue amount. The Revenue Details section shows the ticket price types sold per program and the amount of revenue received based on each program. It

also displays the total amount before adjustments, any adjustments made, the total adjusted amount, and the percentage of total income each revenue category or item represents.

If refunds exist within the date range of the report, the total amount of refunds appears in the **Refunds** column. The **Quantity** column reflects the number of tickets sold minus the number of tickets refunded. If more tickets were refunded than tickets sold within a date range, a negative quantity appears. For example, if you run a sales report for May 1 through May 8, and no tickets were sold but two were refunded, “-2” appears.

When applicable, fees, taxes, and discounts are included in the report and displayed in their respective categories.

- Each fee type applied to the order or item appears in the Fees category. For example, if you apply a delivery fee and a handling fee, rows for each fee appear.
- Each tax type applied to the order or item appears in the Tax category. For example, if a sales tax is applied, a row appears for that tax.
- If the report includes discounts, they appear in the **Discounts** column.

Sales By Program Report

The sales by program report displays sales information for programs and fees. Typically, this report is run quarterly, but you can also view sales for other time periods such as weekly and monthly. To access the Sales by Program Report, from *Sales*, under **Reports**, click **Sales by program report**.

Sales by Program Report

Program: All programs **All programs**
 Group by: Program
 Sales method: All
 Date: Specific date from: 03/01/2010 to: 03/31/2010

View Report

1 of 1

Sales by Program Report

Program: All programs
 Sales method: All
 Start date: 3/1/2010
 Group by: Program
 End date: 3/31/2010

Program	Sales method	Gross	Discounts	Refunds	Fees	Taxes	Net	Percent of net
Admission								
	Daily Sales	\$250.00	\$45.00	\$0.00	\$0.00	\$0.00	\$205.00	7.37%
	Advance Sales	\$120.00	\$7.00	\$0.00	\$0.00	\$0.00	\$113.00	4.06%
Harry Potter and the Half-Blood Prince								
	Daily Sales	\$2,149.65	\$0.00	\$0.00	\$0.00	\$42.15	\$2,107.50	75.80%
	Advance Sales	\$97.75	\$0.00	\$0.00	\$0.00	\$2.75	\$95.00	3.42%
LT - Scheduled Program 1								
	Daily Sales	\$260.20	\$0.00	\$0.00	\$0.00	\$5.20	\$255.00	9.17%
LT - Scheduled Program 10								
	Daily Sales	\$5.70	\$0.00	\$0.00	\$0.00	\$0.70	\$5.00	0.18%

3/25/2010 at 10:09 AM Prepared by: BBNT\StevePh Page 1 of 1

You can select to report on a specific program, specific category, select multiple programs, or on all programs. You can also group by program or sales method. If you group by program, the report displays all the sales for a particular program together and breaks sales down by sales method. If you group by sales method, the report displays all the sales for a particular sales method and breaks the sales down by program. You can include all or specific sales methods during a selected date range in the report results.

Sales Comparison Report

You can run the Sales Comparison Report to evaluate sales performance between different time periods. To view this report, from *Sales*, click **Sales comparison report** under **Reports**. The Sales Comparison page appears.

Sales Comparison

Date: From: To:
 Date: From: To:
 Sales method: Item type: Report type:

1 of 1 Find | Next

Sales Comparison Report

This period: This Month Start date: 2/1/2012 End date: 2/29/2012
 Last period: Last Month Start date: 1/1/2012 End date: 1/31/2012
 Sales method: All sales methods Sales item: All types Report type: Summary

Type	This period		Last period		Variance		% change	
	Qty	Net	Qty	Net	Qty	Net	Qty	Net
Admission Tickets	11	\$10.90	400	\$394.00	-389	(\$383.10)	-97.25	-97.23
Event Registrations	0	\$0.00	5	\$500.00	-5	(\$500.00)	-100.00	-100.00
Memberships	13	\$1,401.00	3	\$102.00	10	\$1,299.00	333.33	1,273.53
Membership add-ons	19	\$285.00	5	\$25.00	14	\$260.00	280.00	1,040.00

Note: You can use the date parameters in the Sales Comparison Report to create a year-over-year report of sales revenue. To create a new report with different data, select the report parameters to use and click **Refresh**.

You can select either "Summary" or "Detailed" from the **Report type** field to determine the report output. The results include the quantity, such as tickets sold or donations made, and net revenue for each revenue category for the time periods selected. The **Variance** column shows the difference between the quantities and revenue as an amount, while the **% Change** column shows the quantity and net revenue difference as percentages.

Deposit Summary Report

The Deposit Summary report displays a list of deposits created during a specific deposit process. When the deposit process runs, payments with a "Not posted" status are linked to one deposit and payments with a status of "Do not post" are linked to another deposit. Refund payments and any cash over/short amounts are included in the "Not posted" deposit.

On this report, you can view specific details about the deposit process you select. The details display the payment methods and amounts included in each deposit, grouped by bank account. You can view and print the Deposit Summary report for completed deposit processes only.

After you run the deposit process, you can view the Deposit Summary report on the Recent Status or History tabs. To view the Deposit Summary report, click **View report** on the action bar.

Deposit Summary

Summary Report | Cash Deposit | Check Report

View report

1 of 2 | 100% | Find | Next

Process: Today's deposits

Started by: Steve Smith | Started on: 1/9/2012 2:22:12 PM

Deposit date: 12/26/2011 | Ended on: 1/9/2012 2:22:16 PM

Deposit details

Bank account	Deposit number	Post date	Reference	Payment method	Quantity	Amount
Bank of America Account						
	33	12/26/2011	Treasury Misc Pmts	Green stamps	1	\$10.41
					1	\$10.41
	34	12/28/2011	Treasury Misc Pmts	Green stamps	1	\$93.38
				Savings Bonds	1	\$5.55
					2	\$98.93
	35	12/29/2011	Treasury Misc Pmts	American Express	1	\$46.73
				Discover	1	\$61.21
				Visa	2	\$84.06
					4	\$192.00

Depending on the payment methods included in the deposit, the report may display **Cash**, **Check**, or **Cash and Check** tabs beside the **Summary Report** tab. On these tabs, you can use filters to define the information you want to view in the report. You can select all or specific records to include, use date filters, and view additional information in the report, such as the deposit slip and the account distribution summary. After you define the filters, click **View Report**.

Note: When you select to group your deposits by day, all deposit information is separated by date.

Close Drawer Report

As part of the close drawer process, you review the information in the Close Drawer report to determine if you entered the correct cash amounts and receipt quantities from your cash drawer at the end of your shift. You then submit the closed drawer for approval by a supervisor or user with security rights.

Close Drawer

User name: Nancy Smith Reference:

Date: 9/27/2011 11:40:01 AM [View report](#)

Include: Transaction details

1 of 1 100% Find | Next

Close Drawer

User name: Nancy Smith

Date: 9/27/2011 11:40:01 AM Include: Transaction details

Payment method	Type	Actual amount	Expected amount	Actual count	Expected count
Cash for deposit		\$70.00	\$0.00	-	-
	Currency \$100	\$100.00	-	1	-
	\$50	\$200.00	-	4	-
	\$20	\$20.00	-	1	-
	Starting balance	(\$250.00)	-	-	-
Check		\$200.00	\$300.00	1	2
Credit card		-	\$15.00	-	1
	MasterCard	-	\$15.00	-	1

Reference:

Payment details

Payment method	Order #	Time	Amount	Count	Details	Patron name
Check						

As a ticket seller, you can access the Close Drawer report after you enter information on the Close drawer screen. To access this screen, from *Sales*, click **Close drawer**. From the Close drawer screen, enter the amount of cash and number of receipts in the cash drawer. After you click **Save**, the Close Drawer report appears.

A user with security rights can access the report from the Approve Closed Drawers page. To access the report, from *Sales*, click **Approve closed drawers**. The Approve Closed Drawers page appears. Click a submitted or approved closed drawer. The Close Drawer report appears.

Note: A closed drawer with a "Submitted" status displays different levels of information in the Close Drawer report than a closed drawer with an "Approved" status. Differences also exist when the close drawer includes cash details rather than a total cash account. For example, a submitted closed drawer with cash detail displays currency and coin amounts, a total amount for cash and checks, and an expected amount for payments other than cash or check in the report. An approved closed drawer with a total cash account displays the total cash counted and starting balance in the report.

Sales Report

With the Sales Report, you can view all sales revenue your organization has received and see the percentage of income each revenue category generates. You can use the date parameters provided to generate a year-to-date report of sales revenue. To view this report, from *Sales*, click **Sales report** under **Reports**.

Sales

Report type: Detailed ▾

Sales method: All ▾ Show graph View report

Date: This Month ▾ From: 2/1/2012 To: 2/29/2012

Revenue summary

Gross	Discounts	Refunds	Net
\$2,126.00	\$20.00	\$1,045.00	\$1,061.00

Percent of net sales

A pie chart titled 'Percent of net sales' showing two categories: 'Memberships' at 94.34% (represented by a large red slice) and 'Membership add-ons' at 5.66% (represented by a small green slice).

Revenue details

Category	Quantity	Gross	Discounts	Refunds	Net	Percent of net
Memberships	9	\$1,601.00	\$20.00	\$580.00	\$1,001.00	94.34%
Add-on Membership	4	\$1,200.00	\$20.00	\$580.00	\$600.00	56.55%

To generate the report, select the criteria of the information to analyze and click **View report**.

- In the **Report type** field, select whether to view the report results in a Summary or Detailed format.
- The Summary view displays a high-level view of revenue, divided by revenue category, such as Admission tickets, Merchandise, Memberships, Membership add-ons, or Donations.
- The Detailed view displays information about the items associated with each revenue category. For example, details about daily admission tickets sold appear under the Admission tickets

category, while details for about memberships sold appear under the Memberships category. Programs with no category assigned appear under **No Category**.

- To include a graphical display of the results, select **Show graph**.
- In the **Sales method** and **Date** fields, select whether to include all or specific sales methods during a selected date range.

After you generate the report, the **Revenue Summary** section displays the total sales revenue, all adjustments by type, and the net revenue amount. The **Revenue Details** section displays the amount of revenue received based on revenue category, an item count for each category, and the percentage of total income each revenue category or item represents. You can also view any adjustments made, the total amount before adjustments, and the total adjusted amount.

If a program includes online combinations, you can expand its row to compare the number of tickets sold individually versus the number sold as part of a combination.

If refunds exist within the date range of the report, the total amount refunded appears in the **Refunds** column. The **Quantity** column reflects the number of tickets sold minus the number of tickets refunded.

Note: If more tickets were refunded than sold within a date range, a negative quantity appears. For example, if you run a sales report for May 1 through May 8, and no tickets were sold but two were refunded, "-2" appears.

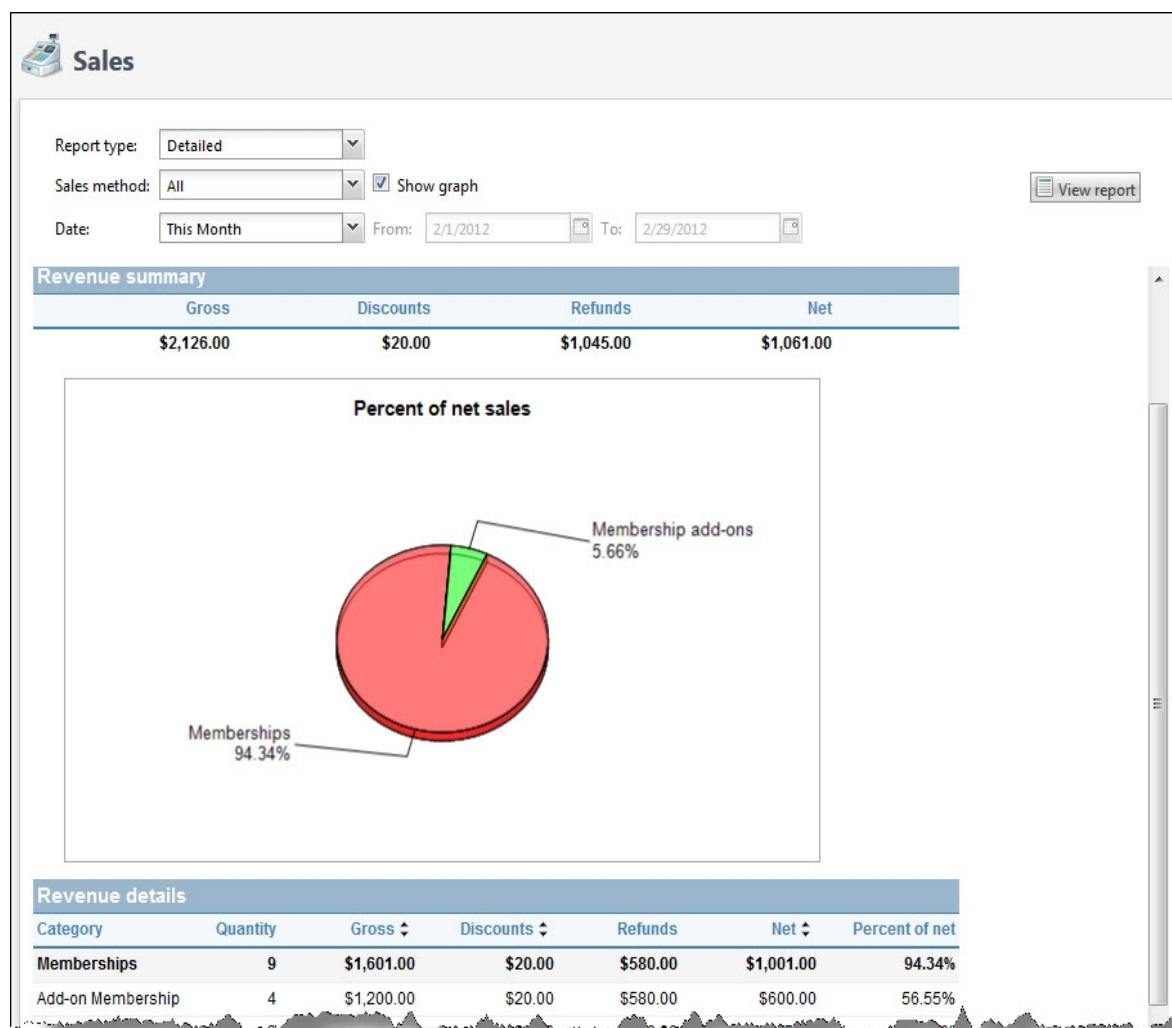
When applicable, fees and discounts are included in the report and displayed in their respective categories.

- Each fee type applied to the order or item appears in the Fees category. For example, if you apply a delivery fee and a handling fee, a row appears for each fee.
- Any discounts included in the report appear in the **Discounts** column.

Scheduled Event Ticket Detail Report

With the Scheduled Event Ticket Detail Report, you can view information about the patrons that purchased tickets to a scheduled event. To view this report, on the Event Attendance report, click on a time to the corresponding scheduled event you want to view. The Scheduled Event Ticket Detail report appears. Click View report. The report appears. For information about the Event Attendance report, see [Event Attendance Report on page 298](#).

Note: You can also access this report from an event record under **Reports**. To access an event record, you can click on an event from the organizational calendar, or select an event from the Event List tab of an event.



The Event Attendance report provides information such as the patron's name, number of tickets purchased by price type, and order number. If you click the order number, either the completed order page or the sales screen to complete the order appears.

Tax Report

The Tax report provides information about the amount of taxes collected during a given period of time. To access the report, from *Sales*, under **Reports**, click **Tax report**. The Tax Report page appears.

Tax Report

Tax: All taxes **All taxes**

Sales method: All sales methods

Date: All dates from: 07/01/2010 to: 07/31/2010 [View Report](#)

1 of 1 100% Find | Next

Tax Report

Tax	Amount	Total collected
Sales Tax	2.00%	\$16.88
Total		\$16.88

7/23/2010 at 4:09 PM Prepared by: BBNT\steveph Page 1 of 1

From here, you select a sales method, a date or date range, and a tax type. After you enter your criteria, click **View report**, to view the results.

Ticket Availability Report

The Ticket Availability report shows the number of tickets sold for all or selected program events, the number of tickets remaining, and the number of tickets reserved by groups. Typically, a Guest Services Manager runs this report to get a clear view of capacity remaining for program events. To view this report, from *Sales*, click **Ticket availability report** under **Reports**.

Ticket Availability Report

Program: All programs **All programs** [View Report](#)

Date: Specific date from: 11/01/2009 to: 02/27/2010

1 of 8 100% Find Next

Ticket availability report

Program: All
Start date: 11/1/2009 End date: 2/27/2010

Date	Event	Time	Capacity	Tickets sold	Tickets reserved	Quantity remaining
Tue 2/9/2010	Sea Turtles Tank Tour	9:00am	25	0	0	25
Tue 2/9/2010	Sea Turtles Tank Tour	9:30am	25	0	0	25
Tue 2/9/2010	Sea Turtles Tank Tour	10:00am	25	0	0	25
Tue 2/9/2010	Sharks - Monsters of the Deep	10:00am	300	0	0	300
Tue 2/9/2010	Sea Turtles Tank Tour	10:30am	25	0	0	25
Tue 2/9/2010	Sea Turtles Tank Tour	11:00am	25	0	0	25
Tue 2/9/2010	Sea Turtles Tank Tour	11:30am	25	0	0	25
Tue 2/9/2010	Sea Turtles Tank Tour	12:00pm	25	7	0	18
Tue 2/9/2010	Sea Turtles Tank Tour	12:30pm	25	0	0	25
Tue 2/9/2010	Sea Turtles Tank Tour	1:00pm	25	0	0	25
Tue 2/9/2010	Sharks - Monsters of the Deep	1:00pm	300	7	0	293
Tue 2/9/2010	Sea Turtles Tank Tour	1:30pm	25	0	0	25

By default, the report includes all programs and all dates. You can view only the events for a specific program by making a selection in the **Program** field. To view events for a specific range of dates, select Specific date in the **Date** field and enter the range. If you select a new date or program, click **View Report** to display updated ticket data.

Zip code Report

The Zip code report displays the results from the Zip code marketing survey to help you understand the demographics of your patrons. If a patron is associated with an order, the report also includes the Zip code information on a patron's constituent record. To access this report, from **Sales**, under **Reports**, click **Zip code report**. You can filter the report by all or specific programs or sales methods. You can also group the report by state, city, or 3 digit ZIP prefix, or 5 digit ZIP. After you have set your filters, click **View Report**.

ZIP Code Report

Program: All programs **All programs**
 Group by: State Sales method: All methods [View Report](#)
 Date: Yesterday from: 03/01/2010 to: 03/31/2010

1 of 1 100% Find | Next

ZIP Code Report

Group by: State Program: All programs
 Sales method: All methods Start date: 3/24/2010 End date: 3/24/2010

US visitors

ZIP Code	City	State	# of Tickets	Percent
California				
90210	Beverly Hills	CA	8	25.81%
			8	25.81%
Texas				
75057	Lewisville	TX	2	6.45%
			2	6.45%
Total			10	32.26%

Non US visitors

Country	# of Tickets	Percent
Luxembourg	2	6.45%
New Zealand	12	38.71%
Total	14	45.16%

Unknown US ZIP

ZIP Code	# of Tickets	Percent
00000	6	19.35%
99999	1	3.23%

The **# of Tickets** column displays the total number of tickets on a transaction with a given zip code, rather than a single count for each transaction.

If a US visitor is a member with no Zip code, or a patron provides an unknown Zip code, it appears under **Unknown US Zip**. If an anonymous patron purchases tickets through Advance Sales, or a patron declines to respond to the marketing survey, the responses appear under **Other**. Any visitors outside of the US appear under **Non US visitors**. Under **Totals**, you can view the totals from all the sections in a summary view.

Sales Dashboards



Access the Sales Dashboard Page	325
Main Dashboard	325
Active Memberships by Program Dashboard	326
Daily Admissions Dashboard	328
Memberships Sold Dashboard	330
Ticket Sales Dashboard	331

Sales dashboards are an effective way to view key sales performance data and are designed to communicate information at a glance. When you access the Sales Dashboard page you can select from multiple dashboards. Each dashboard provides different sales data that is delivered in a visual way that is easy to understand. For example, the main dashboard provides total ticket sales, number of admission tickets sold, number of memberships sold today, and total memberships sold. Additionally, you can access more specific dashboards that provide a closer look at ticket and membership sales data.

Access the Sales Dashboard Page

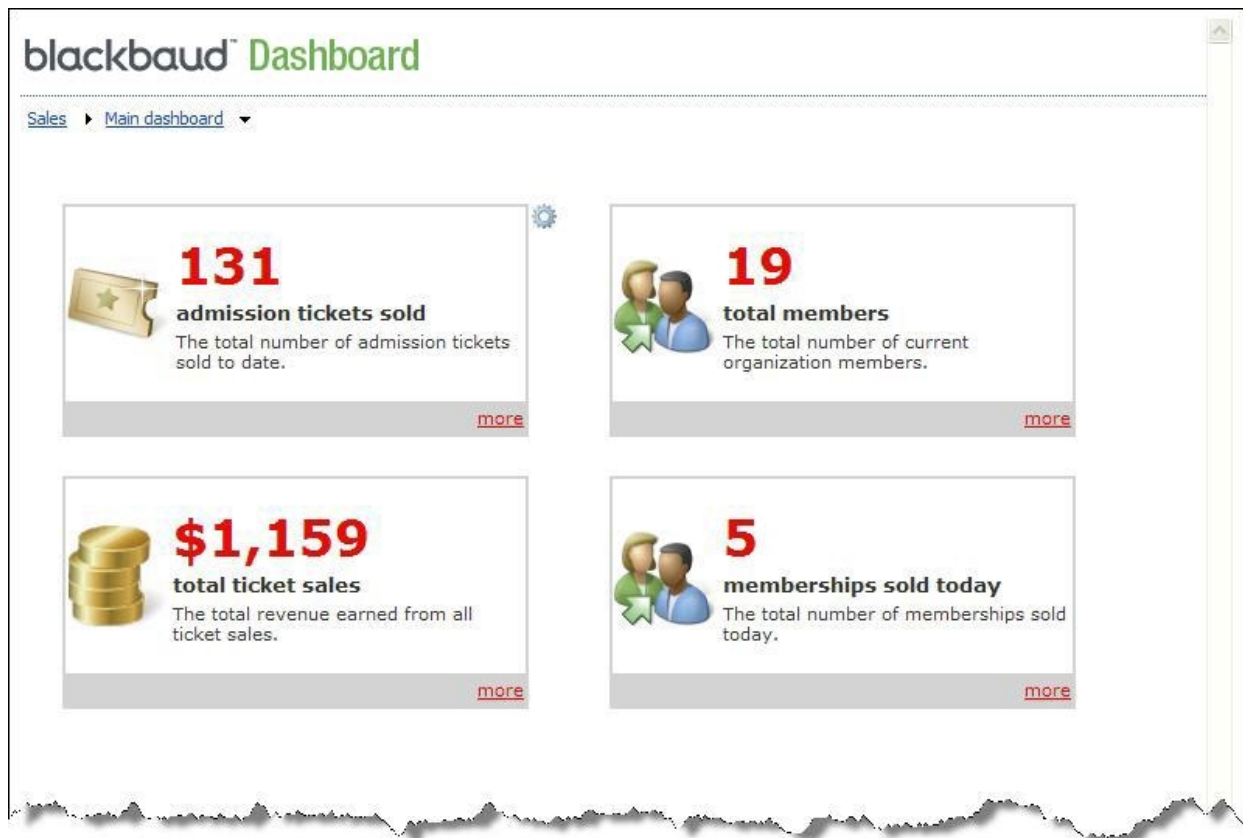
The Sales Dashboard page is the central location to access and view sales-related dashboards. To access this page, from *Sales*, click **Sales Dashboard**.

Note: To view the Sales Dashboard in a browser window, under Tasks, click **Open in browser**. An instance of the default browser on your computer opens and displays the Sales Dashboard page.

From this page you can access the main sales dashboard, daily admission dashboard, ticket sales dashboard, and the membership dashboards. For more information about the data provided in each dashboard, see the next section.

Main Dashboard

The main dashboard provides summary sales information for your organization and includes the total number of admission tickets sold, total revenue in admission ticket sales, total members, and memberships sold today. To access this dashboard, from the Sales Dashboard page, click **Main dashboard**.



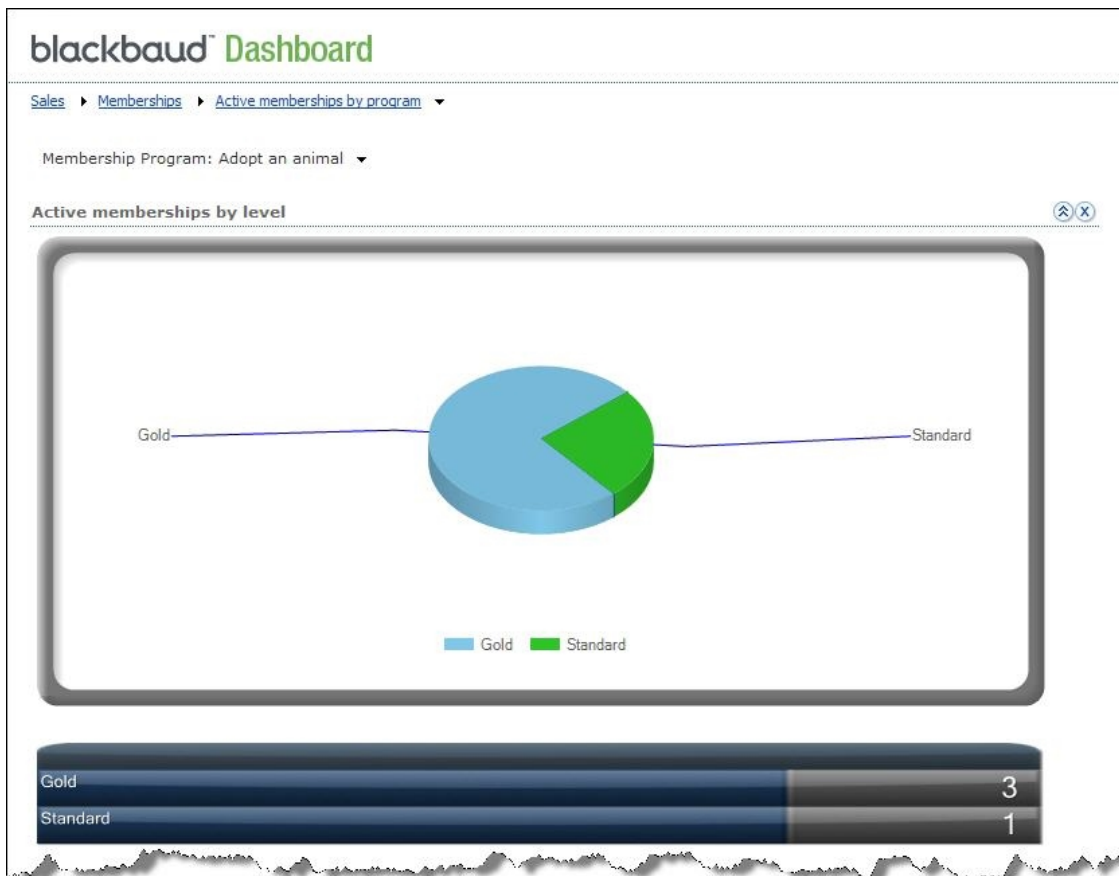
The data displayed on the main dashboard is calculated according to the following:

- The number of admission tickets sold is equal to the total number of tickets sold across all your daily admission programs.
- The number of total members is equal to the total number of active members in your organization.
- The number of total ticket sales is equal to the total revenue earned through your daily admission programs.
- The number of memberships sold today is equal to the total number of memberships sold the current day.

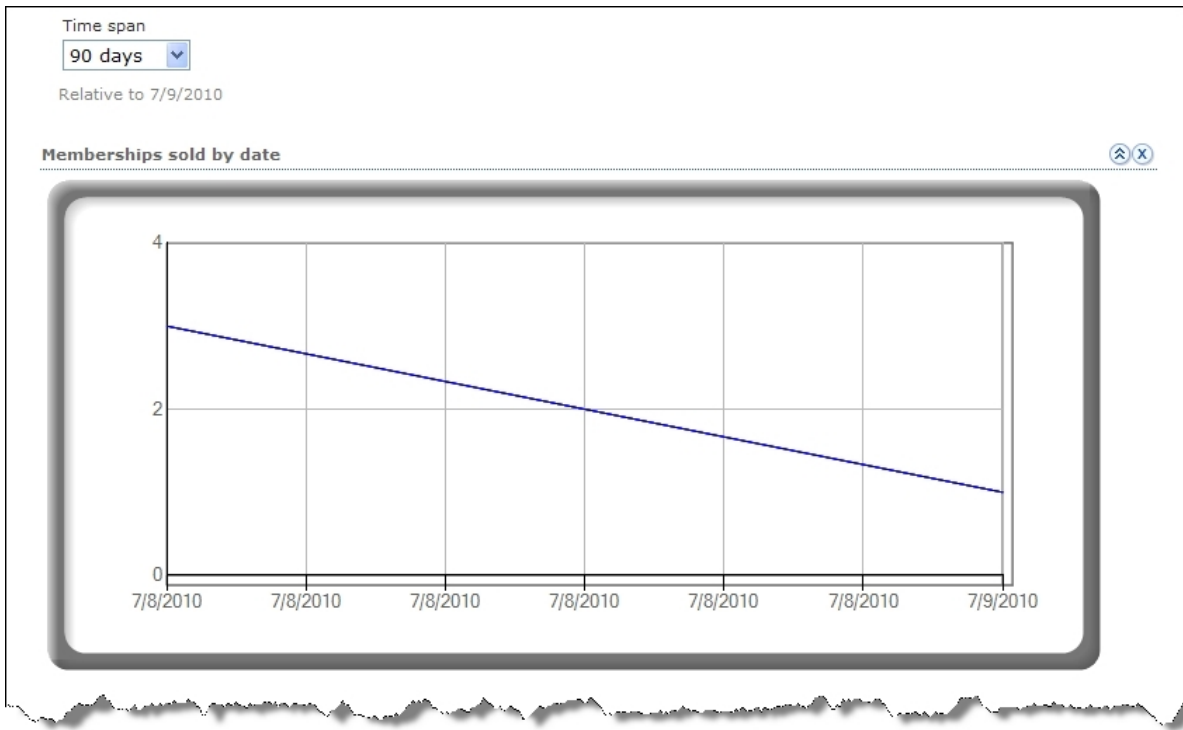
For more specific information about the data displayed, click the corresponding **more** link on each dashboard window. For example, to view information about the types of admission tickets sold, click **more** in the admission tickets sold window. This displays the daily admissions dashboard which provides a breakdown of the number of tickets sold by price type.

Active Memberships by Program Dashboard

With this dashboard, you select a specific program for which to view active memberships by level. After you select a specific membership program, a graph is displayed that clearly shows the proportions of members in each level. The specific number of members in each level is provided below the graph. To access this dashboard, from the Sales Dashboard page, click **Memberships**, and then **Active memberships by program**.

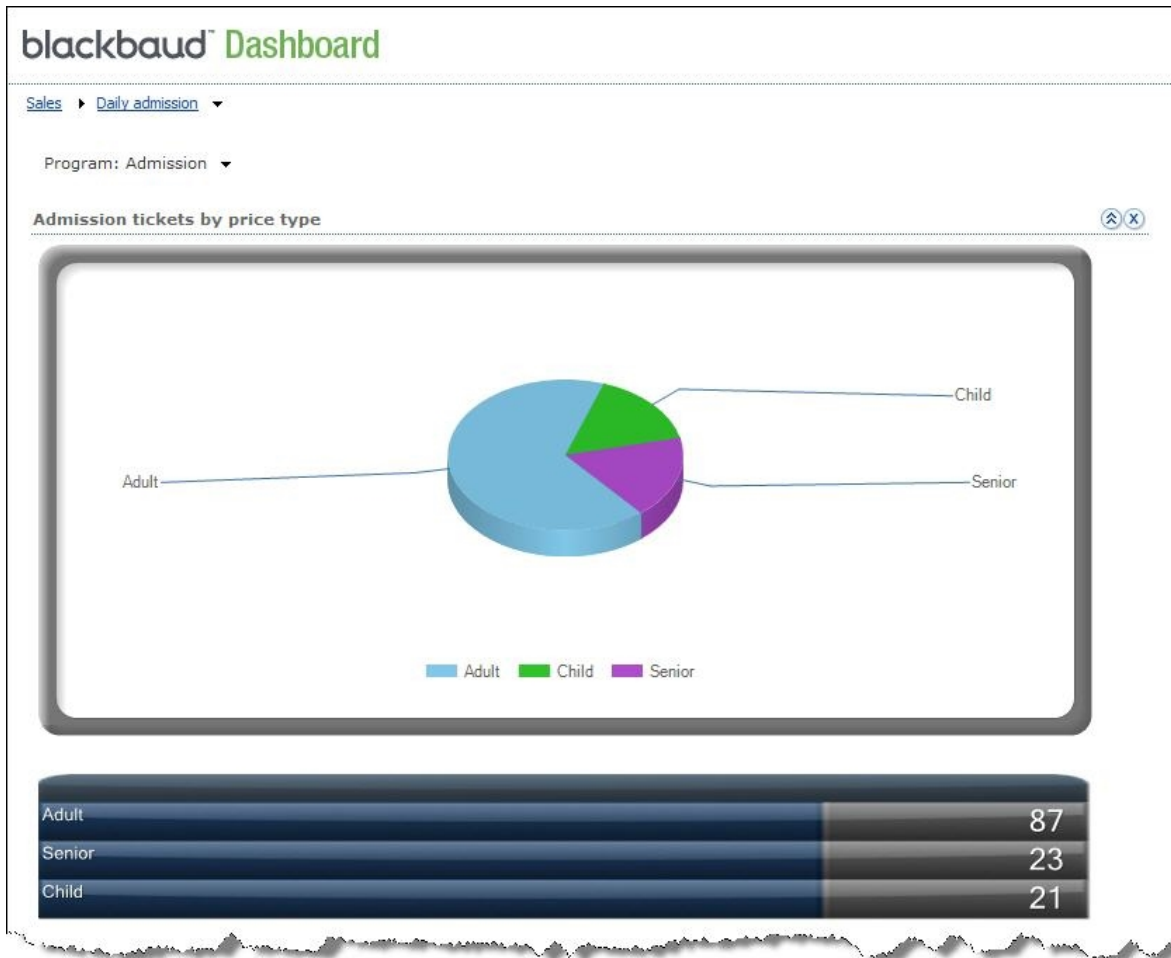


In addition to the active membership program by level graph, this dashboard also provides a memberships sold by date graph that displays all sales of the selected membership program by date parameters you select. In the **Time span** field, you can select the number of days to view or enter a date range.



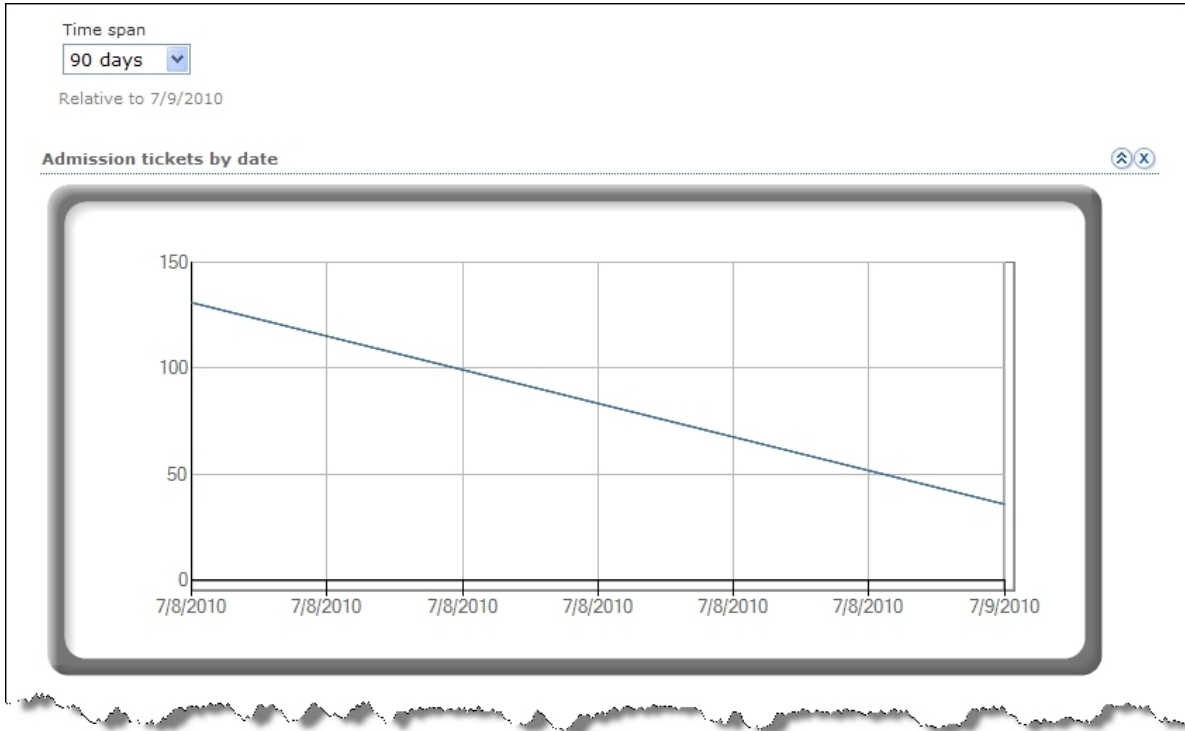
Daily Admissions Dashboard

This dashboard provides a graphical view of the number of admission tickets sold by price type. After you select an admission program, a chart appears with the proportions of admission tickets sold by price type. The specific number of tickets sold in each price type is provided below the graph. To access this dashboard, from the Sales Dashboard page, click **Daily admissions**.



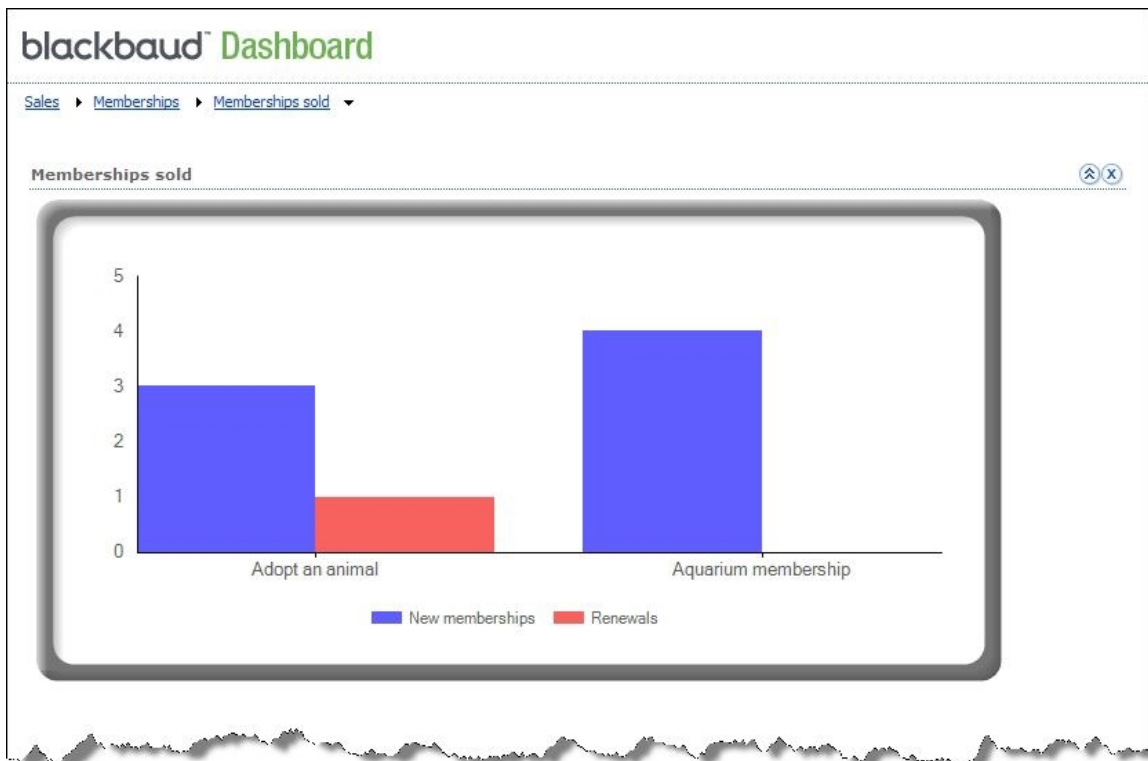
Note: This dashboard provides ticket sales information for daily admission programs only. Scheduled program event ticket sales are not included.

In addition to the admission tickets by price type graph, this dashboard also provides an admission tickets by date graph that displays the number tickets purchased by date for the selected admission program. In the **Time span** field, you can select the number of days to view or enter a date range.



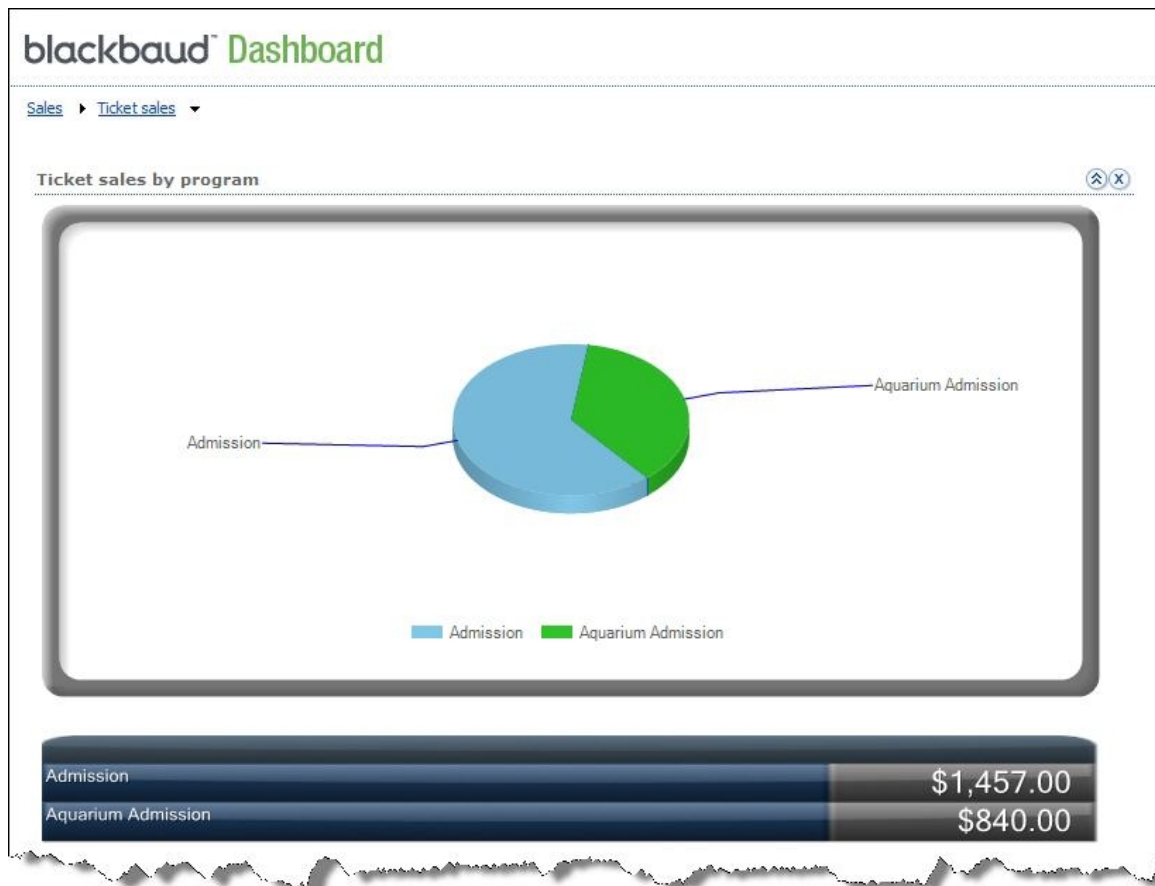
Memberships Sold Dashboard

This dashboard provides a graphical view of the all memberships sold in each program your organization currently offers or has offered in the past. The graph totals reflect all memberships sold, which includes renewals and upgrades. To access this dashboard, from the Sales Dashboard page, click **Memberships**, and then **Memberships sold**.



Ticket Sales Dashboard

This dashboard provides a graphical view of ticket sales based on dollar amount for all admission programs at your organization. The total dollar amount of tickets sold for each program is provided below the graph. To access this dashboard, from the Sales Dashboard page, click Ticket sales.



Note: This dashboard provides ticket sales information for daily admission programs only. Scheduled program event ticket sales are not included.

In addition to the ticket sales by program graph, this dashboard also provides a ticket sales by date graph that displays the total dollar amounts of admission ticket sold by date. In the **Time span** field, you can select the number of days to view or enter a date range.

Time span

90 days

Relative to 7/9/2010

Ticket sales by date

