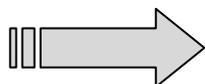


Advance Sales Workflow

Quick Reference Guide

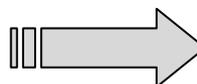
- The advance sales process consists of three primary steps: associate a patron with the order (or skip this step if a patron record is not needed), create the order, and pay for the order.
- From the Advance Sales page, you can sell tickets to scheduled events or general admission programs, sell, renew, rejoin, or give a gift of membership, accept donations, register patrons for fundraising events, and apply discounts to orders.
- The contents of the order are displayed in the **Order summary** section on the right side of the screen. The **Order summary** section acts as the patron's shopping cart and is automatically updated as the order progresses. You can edit and delete items from the **Order summary** section.

Select Patron



- You associate a patron with the order on the Select Patron tab.
- If a patron record is not needed, you can skip this step and move on to the Create Order tab.
- To link a patron to the order, you can either type the patron's name into the **Select patron** field, click the magnifying glass to search for a patron, or swipe the patron's membership card, if applicable.
- If the patron does not already have a record, click **Add a new patron** to create a patron record.

Create Order



- For tickets, select the program or event, and then add the appropriate number and type of tickets to the order.
- To sell a membership, or give a membership, click **Memberships** on the action bar.
- To pay for an event registration, or register for a new one, click **Event registration** on the action bar.
- To apply and manage all discounts and promotions in the order, click **Discounts and promotions**.
- To accept a donation at the point of sale, click **Donation**.

Add Payment

- On the Accept Payment tab, you select the payment method and add payments to the order.
- You can accept multiple payments of different payment methods.
- If the order requires delivery, you can click **Edit** under **Delivery** to select the delivery method. You can select or add new address and contact information for the order if necessary.
- If applicable, click the **Pay on Arrival** button to reserve the patron's order and defer payment for a later date.



NOTE: All programs and events for which tickets may be purchased for the current day appear by default on the Create Order tab. However, you can use the Date and Name filters to locate other events and programs.