

# Processing An Order Using An Account Balance

1. [Log in](#) to Sales.

2. Click the **Maintenance** Icon. (Image 2)

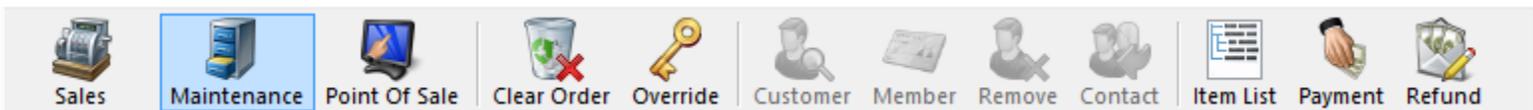


Image 2

3. Search for the customer by entering the **Order #** or the customer's **Last Name**. Then click the appropriate green check mark. Double click the correct order to bring up order contents on the **Item Summary** page. (Image 3)

Phone:    E-mail:  Zip:

Order #  ✓  
 Last Name  ✓  
 Exact Match

Customer #  ✓  
 Document #  ✓  
 Credit Card  Gift Card

Last orders for  ✓  
 Last orders you sold or maintained ✓  
 Barcode  ✓  
 Membership  ✓  
 Member #  ✓  
 List orders for an event

Name	Order #	Order Date	Org	Buyer Type	City	State	Changed	User
Agile, Bill	76576	6/16/2015 1:29 PM	Agile Theatre	AMS - BoxOffice	HERMITAGE	TN	6/16/2015 1:41 PM	sa
Agile, DeeDee	76561	6/15/2015 10:04 AM	Agile Theatre	AMS - BoxOffice	HERMITAGE	TN	6/15/2015 10:56 AM	sa
Agile, DeeDee	76560	6/11/2015 12:43 PM	Agile Theatre	AMS - BoxOffice	HERMITAGE	TN	6/12/2015 3:34 PM	sa
Agile, Mary	76461	5/7/2015 10:13 AM	Agile Theatre	AMS - BoxOffice	Hermitage	TN	6/12/2015 11:38 AM	sa
Agile, Joe	76559	6/9/2015 2:14 PM	Agile Theatre	Web - Advanced	Hermitage	TN	6/9/2015 2:16 PM	agileweb
Agile, Joe	76552	6/4/2015 11:02 AM	Agile Theatre	Web - Advanced	Hermitage	TN	6/4/2015 11:05 AM	agileweb
Agile, Joe	76520	5/22/2015 12:18 PM	Agile Travel	Web - Retail	Hermitage	TN	5/22/2015 12:20 PM	agileweb
Agile, Joe	76518	5/22/2015 11:09 AM	Agile Travel	Web - Retail	Hermitage	TN	5/22/2015 11:10 AM	agileweb
Agile, Joe	76501	5/20/2015 3:54 PM	Agile Travel	Web - Retail	Hermitage	TN	5/20/2015 3:56 PM	agileweb
Agile, Joe	76500	5/20/2015 3:52 PM	Agile Travel	Web - Retail	Hermitage	TN	5/20/2015 3:52 PM	agileweb
Agile, Joe	76498	5/18/2015 3:25 PM	Agile Club	Web - Retail	Hermitage	TN	5/18/2015 3:33 PM	agileweb
Agile, Joe	76497	5/18/2015 3:23 PM	Agile Club	AMS - Boxoffice	Hermitage	TN	5/18/2015 3:24 PM	sa
Agile, Joe	76480	5/18/2015 12:48 PM	Agile Club	Web - Retail	Hermitage	TN	5/18/2015 12:52 PM	agileweb
Agile, Joe	76462	5/11/2015 4:08 PM	Agile Theatre	Web - Advanced	Hermitage	TN	5/11/2015 4:11 PM	agileweb
Agile, Mary	76455	5/5/2015 11:57 AM	Agile Theatre	AMS - BoxOffice	** No City **	--	5/5/2015 11:58 AM	sa
Agile, Joe	76446	4/23/2015 8:59 AM	Agile Theatre	Web - Advanced	Hermitage	TN	4/23/2015 9:04 AM	sa
Agile, Joe	76435	4/21/2015 10:56 AM	Agile Theatre	AMS - BoxOffice	Hermitage	TN	4/21/2015 11:01 AM	sa
Agile, Joe	76434	4/21/2015 10:33 AM	Agile Theatre	AMS - BoxOffice	Hermitage	TN	4/21/2015 10:55 AM	sa
Agile, Joe	76431	4/21/2015 8:44 AM	Agile Sports	AMS - Advanced	Hermitage	TN	4/21/2015 8:45 AM	sa
Agile, Joe	76430	4/20/2015 5:15 PM	Agile Theatre	AMS - BoxOffice	Hermitage	TN	4/20/2015 5:15 PM	sa

Previous Next Records Per Page:  Current Search: Customer Last Name

Image 3

4. Your order should have an **Account Balance** visible in the upper right-hand corner.

(Image 4)

The screenshot displays a customer order summary for Customer # 23718. The top right corner features a 'Credit Info' section with the following details:

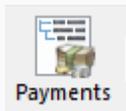
Credit Limit:	\$0.00
Available Credit:	\$0.00
Account Balance:	(\$20.00)
Deferred Balance:	\$0.00

The main 'Item Summary' table lists the following items:

Event Name	Event Time	Venue	Price	Fee	Service Fee	Delivery	Sold For	Transaction	Fulfilled
Black Butterflies	9/18/2015 4:00 AM	Agile Theatre (S2)							
0 General Admission - General Admission									
Ticket			\$10.00	\$0.00	\$0.00			78307	
Ticket			\$10.00	\$0.00	\$0.00			78307	
Delivery Fee									
Will-Call		No-Charge	\$0.00					78307	

A red arrow points to the 'Account Balance' row in the 'Credit Info' section.

Image 4



5. Click on the **Payments** icon at the top of the page to verify the refund method.

If it has been done through Account Balance, you will see the line item. (Image 5)

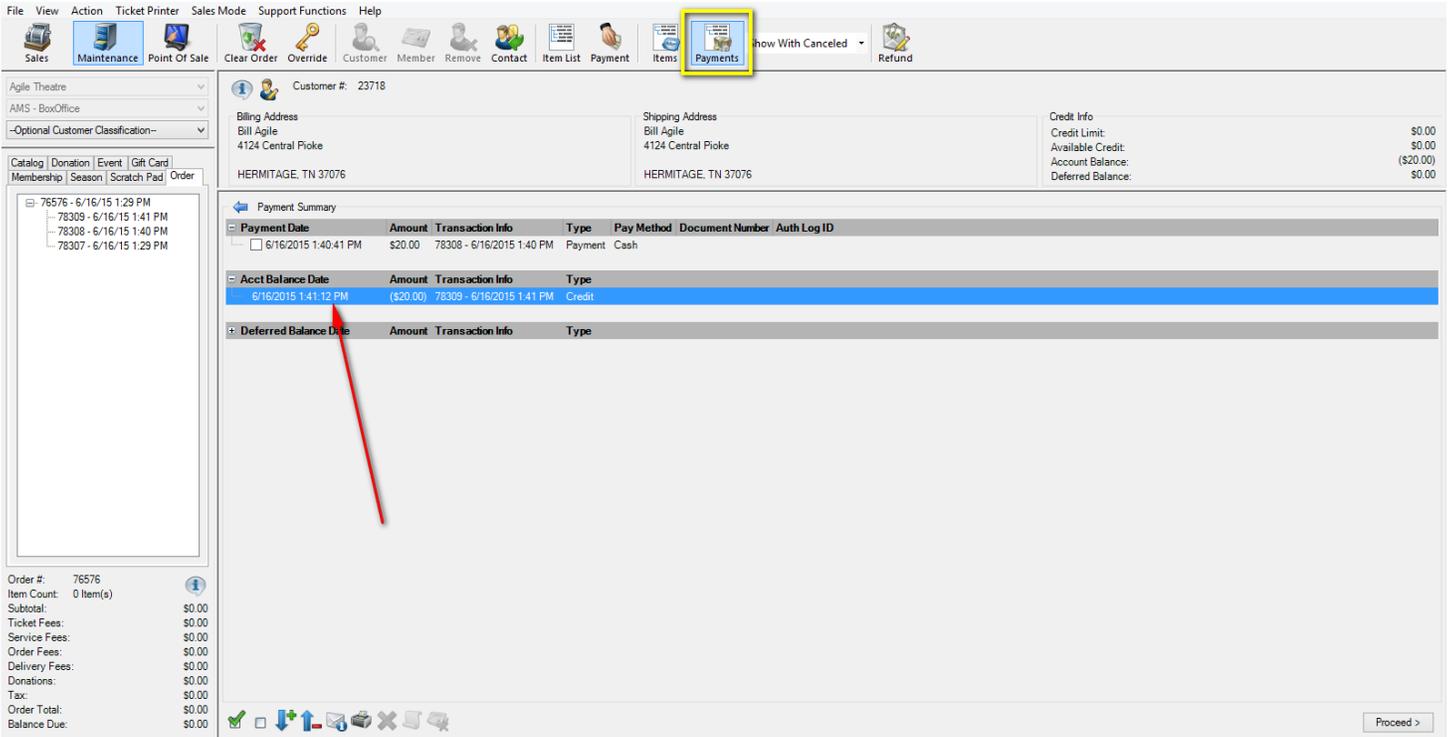
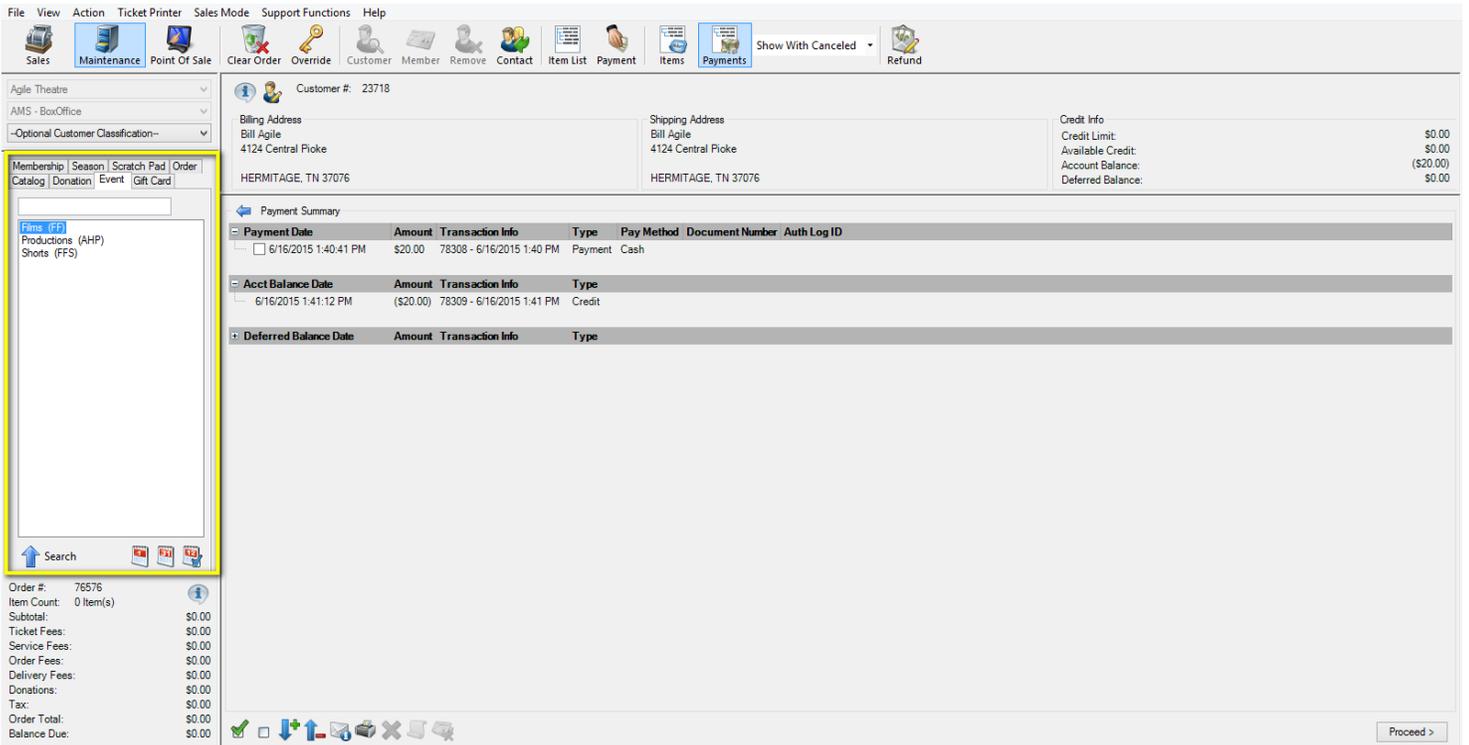


Image 5

6. Off to the side, select the **Event** tab and then the **Line Item** you wish to sell. (Image 6)



## Image 6

7. Select the event or show from the list on the right. Add the quantity of tickets for your new event. Then click **Proceed**. (Image 7)

Start Date: Tue, Jun 16 2015 | Inventory: Open |  All Tiers |  Restricted Prices

Name	Day	Date	Duration	Venue	Org	Sale Status
Even the Rain	Tue	Sep 15, 2015 4:10 AM	1h 44m	Central Pike Cinema	FF	On Sale
Bill Cunningham New York	Tue	Sep 15, 2015 7:15 AM	1h 24m	Central Pike Cinema	FF	On Sale
Bill Cunningham New York	Fri	Sep 18, 2015 4:00 AM	1h 24m	Elm Hill Cinema	FF	On Sale
Black Butterflies	Fri	Sep 18, 2015 4:00 AM	1h 40m	Agile Theatre (S2)	FF	On Sale
Bride Flight	Fri	Sep 18, 2015 4:00 AM	2h 10m	Central Pike Cinema	FF	On Sale
Agile Shorts Night	Fri	Sep 18, 2015 7:00 AM	1h 33m	Elm Hill Cinema	FF	On Sale
Black Butterflies	Fri	Sep 18, 2015 7:00 AM	1h 40m	Agile Theatre (S2)	FF	On Sale
Don't Fence Me In	Fri	Sep 18, 2015 7:00 AM	1h 14m	Agile Theatre (S1)	FF	On Sale

Previous | Next | Results Per Page: 20

Tier - Sales Line Type	Price	Fee	Service Fee	Subtotal	Available
<input type="checkbox"/> General Admission - General Admission					59
<input type="checkbox"/> + 2 Ticket	\$10.00	\$0.00	\$0.00	\$10.00	
<input type="checkbox"/> + 0 Voucher Redemption	\$0.00	\$0.00	\$0.00	\$0.00	
<input type="checkbox"/> Stand By / Rush - General Admission					0
<input type="checkbox"/> + 0 Ticket	\$10.00	\$0.00	\$0.00	\$10.00	

Express Sale | Add | Proceed > | Pay >>

Cashed In | Training Mode

## Image 7

8. You will then be brought back to the Line Item Summary, from there click Proceed. (Image 8)

Customer #: 23718

<b>Billing Address</b> Bill Agile 4124 Central Pioke HERMITAGE, TN 37076	<b>Shipping Address</b> Bill Agile 4124 Central Pioke HERMITAGE, TN 37076	<b>Credit Info</b> Credit Limit: \$0.00 Available Credit: \$0.00 Account Balance: (\$20.00) Deferred Balance: \$0.00
---	--	--

Item Summary

Event Name	Event Time	Venue	Price	Fee	Service Fee	Delivery	Sold For	Transaction	Fulfilled
<input checked="" type="checkbox"/> Black Butterflies	9/18/2015 4:00 AM	Agile Theatre (S2)							
<input type="checkbox"/> 0 General Admission - General Admission									
Ticket			\$10.00	\$0.00	\$0.00			78307	
Ticket			\$10.00	\$0.00	\$0.00			78307	
<input type="checkbox"/> Bride Flight	9/18/2015 4:00 AM	Central Pike Cinema				Print Immediately - No Charge			
<input type="checkbox"/> 2 General Admission - General Admission									
Ticket			\$10.00	\$0.00	\$0.00			78312	
Ticket			\$10.00	\$0.00	\$0.00			78312	
<b>Delivery Fee</b>									
<input type="checkbox"/> Print Immediately		<b>Delivery Price Type</b>	<b>Delivery Fee</b>				<b>Transaction</b>		
		No Charge	\$0.00				78312		
<input checked="" type="checkbox"/> Will Call		No Charge	\$0.00				78307		

Proceed >

Image 8

9. On the Payment Information page under payment method select **Apply Account Balance up to** ...this will apply the Account balance to the new tickets. If the Account Balance only partially covers the full payment due, click Apply Payment. Then pay the remaining balance as normal. Click Finalize. (Image 9)

Customer #: 23718

<b>Billing Address</b> Bill Agile 4124 Central Pioke HERMITAGE, TN 37076	<b>Shipping Address</b> Bill Agile 4124 Central Pioke HERMITAGE, TN 37076	<b>Credit Info</b> Credit Limit: \$0.00 Available Credit: \$0.00 Account Balance: (\$20.00) Deferred Balance: \$0.00
---	--	--

<b>Payment Information</b> Amount: 20.00 (Choose Method) [Dropdown] Cash Discover Gift Card - Film Cash MasterCard Visa Apply Account Balance up to (\$20.00) (Mo.) [Dropdown] (Year) [Dropdown] Security Code [Input] Training Mode Active	<b>Summary Info</b> Transaction Number: 78312 Subtotal: \$20.00 Donations: \$0.00 Tax: \$0.00 Total: \$20.00 Minimum Due: \$20.00	<b>Current Payments</b>
--	---	-------------------------

Payment Total: \$0.00  
Current Balance Due: \$20.00

Apply Payment Finalize \$1 \$5 \$10 \$20 \$50 \$100 Exact Change Void Selected

Image 9