Processing An Order Using An Account Balance

1. Log into 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 Customer # Document #	agle ge Evact Match Credit Card Gft Card	Last orders for Agile Admin - Regit v Last orders you sold or maintained Barcode (All) v Membership (All) v List orders for an event	* * * * *					
Name	Order #	Order Date	Org	Buyer Type	City	State	Changed	User
Acile Bill	76576	6/16/2015 1-29 PM	Agile Theatre	AMS - BoxOffice	HERMITAGE	TN	6/16/2015 1-41 PM	53
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	Hemitage	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 P	Page: 20 🚖 Current Search: Custo	omer Last Name					

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

(Image 4)

🕦 🧞 Customer #: 23718								
Diff. A.L.							0.547	
Billing Address			Shipping Addres	ss			Credit Info	0.03
4124 Central Ricke			A124 Central P	ioka			Credit Limit:	\$0.0 ¢0.0
4124 Central Floke			4124 Central 1	IOKC			Account Palance:	(\$20.0
HERMITAGE, TN 37076			HERMITAGE,	TN 37076			Deferred Balance:	↓ SU.U
								/
Item Summary								
EventName	EventTime	Venue	Price	Fee	Service Fee Delivery Sold For	Transaction Fulfille	d	
Black Butterflies	9/18/2015 4:00 AM	Agile Theatre (S	2)					
General Admission - General Admissio	n							
Ticket			\$10.00	\$0.00	\$0.00	78307		
Ticket			\$10.00	\$0.00	\$0.00	78307		
Delivery Fee	Dolivon Price Ture		Delivery E	~		Transation		
Will Call	No Charge	6	\$0.00	cc		78307		
······································	Ho Gildige		00.00			+0007-		
					~ ?			
🔬 🗆 🚹 🖿 🖓 🔟 🚓 💥 🤉			1 De 19	99	eg vo (p)			Proceed >
Image 4								

5. Click on the **Payments** icon Payments 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)

File View Action Ticket Printer Sales	Mode Support Functions Help	tens		
Agile Theatre 🗸	① 2 Customer #: 23718			
AMS - BoxOffice 🗸	Riling Address	Shinning Address	Credit Info	
-Optional Customer Classification-	Bill Agile	Bill Agile	Credit Limit:	\$0.00
Catalog Donation Event Gift Card	4124 Central Pioke	4124 Central Picke	Available Credit: Account Balance:	\$0.00 (\$20.00)
Membership Season Scratch Pad Order	HERMITAGE, TN 37076	HERMITAGE, TN 37076	Deferred Balance:	\$0.00
B- 76576 - 6/16/15 1:29 PM	Payment Summary			
	Payment Date Amount Transaction Info Type Pa	y Method Document Number Auth Log ID		
78307 - 6/16/15 1:29 PM	6/16/2015 1:40:41 PM \$20.00 78308 - 6/16/2015 1:40 PM Payment Ca	sh		
	- Acct Balance Date Amount Transaction Info Type			
	6/16/2015 1:41:12 PM (\$20.00) 78309 - 6/16/2015 1:41 PM Credit			
	+ Deferred Balance Date Amount Transaction Info Type			
Order #: 76576 (iftem Count: 0 Item(s) Subtotal: \$0.00 Schotal: \$0.00 Service Fees: \$0.00 Delivery Fees: \$0.00 Dorations: \$0.00 Tax: \$0.00				
Balance Due: \$0.00	⊻ □ ↓* 1_ ⊠ ≪ X <i>≣ ⊲</i> 2		Proc	eed >

Image 5

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

File View Action Ticket Printer Sales	Mode Support Functions Help					
Sales Maintenance Point Of Sale	Clear Order Override	er Member Remove Contact	List Payment	Items Payments Show With Canceled - Refund		
Agile Theatre V AMS - BoxOffice V -Optional Customer Classification V	Customer #: 2371 Billing Address Bill Agile 4124 Central Pioke	8		Shipping Address Bill Agile 4124 Central Picke	Credit Info Credit Limit Available Credit	\$0.00 \$0.00
Membership Season Scratch Pad Order Catalog Donation Event Gift Card	HERMITAGE, TN 37076			HERMITAGE, TN 37076	Account Balance: Deferred Balance:	(\$20.00) \$0.00
	a Payment Summary					
Films (FF) Productions (AHP) Shorts (FFS)	Payment Date 6/16/2015 1:40:41 PM	Amount Transaction Info \$20.00 78308 - 6/16/2015 1:40 PM	Type Pa Payment Ca	y Method Document Number Auth Log ID		
	Acct Balance Date	Amount Transaction Info	Туре			
	6/16/2015 1:41:12 PM	(\$20.00) 78309 - 6/16/2015 1:41 PM	Credit			
	Deferred Balance Date	Amount Transaction Info	Туре			
Search Image: Search Order #: 76576 Hem Count: 0 Hem(s) Subtotal: \$0.00 Ticket Fees: \$0.00 Order #:: \$0.00 Deriver Fees: \$0.00 Delivery Fees: \$0.00 Delivery Fees: \$0.00 Tax: \$0.00						
Order Total: \$0.00 Balance Due: \$0.00	🖌 🗆 🛟 🕇 🖓 🖏	XJQ				Proceed >

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)

itart Date Tue, Jun 16 2015)pen		MI Tie	ers Restricted Prices	- 23 (
lame			Day Date			Duration	Venue		Org	Sale Status
iven the Rain			Tue Sep 1	15, 2015 4:10 AM		1h 44m	Central Pike Cinema		FF	On Sale
lill Cunningham New York			Tue Sep 1	15, 2015 7:15 AM		1h 24m	Central Pike Cinema		FF	On Sale
lill Cunningham New York			Fri Sep 1	18, 2015 4:00 AM		1h 24m	Elm Hill Cinema		FF	On Sale
ack Butterflies			Fri Sep 1	18, 2015 4:00 AM		1h 40m	Agile Theatre (S2)		FF	On Sale
ride Flight			Fri Sep 1	18, 2015 4:00 AM		2h 10m	Central Pike Cinema		FF	On Sale
gile Shorts Night			Fri Sep 1	18, 2015 7:00 AM		1h 33m	Elm Hill Cinema		FF	On Sale
lack Butterflies			Fri Sep 1	18, 2015 7:00 AM		1h 40m	Agile Theatre (S2)		FF	On Sale
Ion't Fence Me In			Fri Sep 1	18, 2015 7:00 AM		1h 14m	Agile Theatre (S1)		FF	On Sale
Previous Next Results Per Pag	e 20									
Heat Heat Heat		•								
ier - Sales Line Type	Price	Fee	Service Fe	ee Subtotal Available						
General Admission - General Admission					59					
🕂 🚍 2 Ticket	\$10.00	\$0.00	\$0.00	\$10.00						
🖶 🛑 0 Voucher Redemption	\$0.00	\$0.00	\$0.00	\$0.00						
Stand By / Rush - General Admission					0					
📥 🚥 0 Ticket	\$10.00	s0 00	\$0.00	\$10.00						
				•						
								\ \		
								Express Sale Add	Proceer	d> Pa
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 Biling Address Bill Agile 4124 Central Pioke HERMITAGE, TN 37076		Shi Bil 41: HE	pping Address I Agile 24 Central Pioke RMITAGE, TN 370	76				Credit Info Credit Limit: Available Credit: Account Balance: Deferred Balance:	\$0.00 \$0.00 (\$20.00) \$0.00
tem Summary							0.115		
Event Name	9/19/2015 4:00 AM	Venue	Price	⊦ee	Service Fee	Delivery	SoldFor	I ransaction Fulfilled	
Order Butternies Order Butternies Order Butternies	3/16/2013 4.00 AM	Agrie Trieatre (52	9						
Ticket			\$10.00	<0.00	\$0.00			78307	
Ticket			\$10.00	\$0.00	\$0.00			78307	
	9/18/2015 4:00 AM	Central Pike Cine	ma	00.00	00.00	Print Immediately - No Charge		10007	
Control Admission - General Admission	5/10/2010 4.00 AM	Contrait into Cinc				This initial and any the charge			
Ticket			\$10.00	\$0.00	\$0.00			78312	
Ticket			\$10.00	\$0.00	\$0.00			78312	
_									
Delivery Fee	Delivery Price Type		Delivery Fe	e				Transaction	
Print Immediately	No Charge		\$0.00					78312	
Will Call	No Charge		\$0.00					78307	
			s. ee						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)

1 💽 🐉 Customer #: 23718			
Rilling Address	Shinning Address	Credit Info	
Bill Agile	Bill Agile	Credit Limit	\$0.00
4124 Central Pioke	4124 Central Pioke	Available Credit:	\$0.00
		Account Balance:	(\$20.00)
HERMITAGE, TN 37076	HERMITAGE, TN 37076	Deferred Balance:	\$0.00
Payment Information Summary Info			Current Payments
Amount 20.00 Transaction Number:			
(Choose Method) V			
(Choose Method) \$20.00			
Cash \$0.00			
Discover \$0.00			
MasterCard \$0.00			
Visa \$0.00			
Apply Account Balance up to (\$20.00)			
(Mo.) V (Year) V Donatons. 30.00			
Security Code T L L ADD 00			
Total: \$20.00			
Minimum Due: \$20.00			
/			
F F	ayment Total:		\$0.00
/ c	Current Balance Due:		\$20.00
Apply Payment Finalize \$1 \$5 \$10 \$20 \$	50 \$100 Exact Change		Void Selected

Image 9