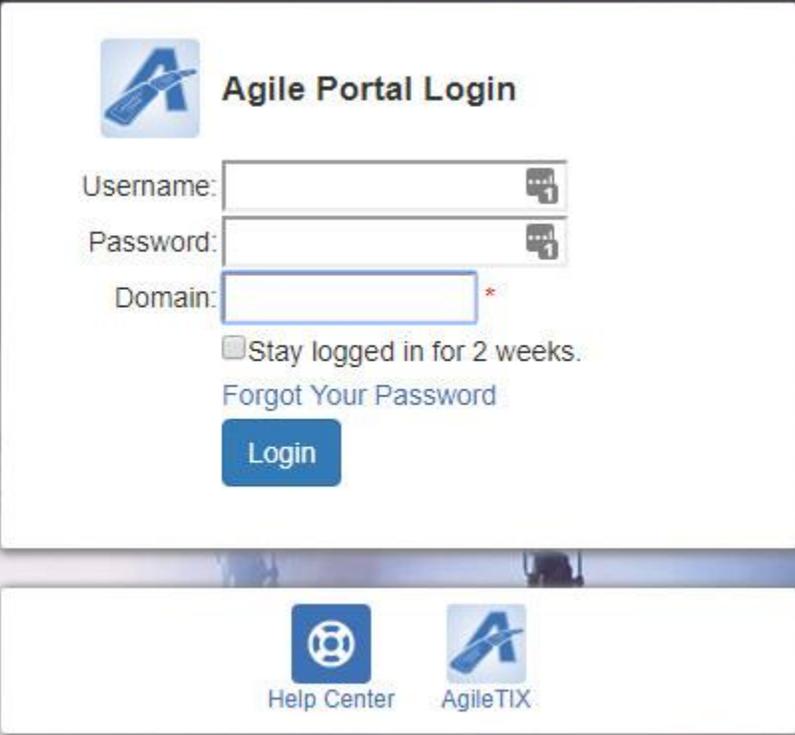


Customer Search and Management in Web Portal

You may now search for and manage customer records in Web Portal.

1. First, go to portal.agiletix.com.
2. Log into your account with your **Username**, **Password**, and **Domain**.



 **Agile Portal Login**

Username:

Password:

Domain: *

Stay logged in for 2 weeks.

[Forgot Your Password](#)

[Login](#)

 Help Center  AgileTIX

3. Click the **Customer Icon** on the left side of the screen.



4. To Search for an existing customer, enter the name of the customer or a **Keyword** such as an address, phone number, or email address. Or, if you need to create a new customer, click **Add Customer** at the bottom of the page.

Agile Theater (QA)  

+ ADD CUSTOMER

Search

Exact Match Show In-Active Include Related

	Name	Customer #	Address	Related Customers
	Brannigan, Zap	3929992	55 Main Street Monteagle, TN 37357	

5. A list of matching criteria should appear.

6. Click the **Pencil** icon next to the customer name to edit.

	Name	Customer #	Address	Related Customers
	Brannigan, Zap	3929992	55 Main Street Monteagle, TN 37357	

7. From this page, you are able to edit customer information by clicking on the field you want to edit.

Customer

Properties

Customer #: 3929992

Enabled
 Business

Prefix:

First name:

Middle name:

Last name:

Suffix:

Web Address :

Email:

Check here to receive email from the Belcourt Theatre
 Receive email related to TixNash

Web Logins

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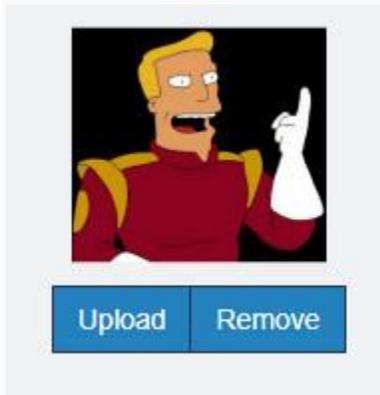
Addresses

Primary address: 55 Main Street Suite 3 Monteagle, TN 373567 United States

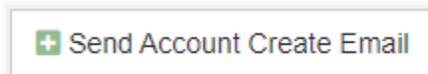
Phone Numbers

Primary:

8. You can upload an image that can be used on memberships cards and festival passes. Click the upload button and select the image from your computer.



9. If the Customer does not have an online account but wants to create one, click the **Send Account Create Email** button to email them the account link.



10. If they already have a **Web Login** but have forgotten their password, click the envelope button to send them the password reset email.

Web Logins

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Addresses

Primary address:  55 Main Street Suite 3 Monteagle, TN 373567 United States

 Add New Address

Phone Numbers

Primary:

Secondary:

Notes:

Operator Notice

11. You can also view and edit **Questions** that have been set up.

Questions : Extra Info

Salutation

What is your date of birth? *

12. From this page, you can also view and add memberships. (Click to learn more about [Adding and Managing Memberships in Web Portal](#))

13. **Customer Relationships** can be established on this page. Relationships can be a spouse, child, co-worker, etc. Click **Add New Related Customer** to search for a customer record. This ties them together as a household or contact.

Customer Relationships

[+ Add New Related Customer](#)

- Click the **Search Bar** and enter the customers' name in the search field.

Relationship Edit

Customer ▼

Type ▼

[Accept](#) [Cancel](#)

- From the drop-down, select the **Relationship Type**. (i.e. **Contact**, **Sold For**, or **Business**). **NOTE:** Additional Types can be added if needed. Contact your Client Support Rep for more information.

Relationship Edit

Customer: 3939991: Kif Kroker

Type: Contact (selected), Business, Sold For

Accept Cancel

14. To assign a touch point to a customer record that you need to assign to a member of your staff, click the **Add New Touch Point** icon.

Touch Points

+ Add New Touch Point

- On the **Touch Point** page, enter in the subject of your touch point, the type of touch point, and to whom this task should be assigned.

Touch Point

Add Touch Point

Customer Name: Zap Brannigan
Created Date: Mar-26-2018 11:50 AM
Updated Date: Mar-26-2018 11:50 AM
Created By: Hannah Steward

Subject: Please Contact this customer

Touch Point Type: Phone

Assigned User: Hannah Steward

Due Date
 Completed

Comments

- If you want to add a due date for this task, check the **Due Date** box, and enter the due date and time in the box that appears.

Touch Point

Add Touch Point

Customer Name: Zap Brannigan
Created Date: Mar-26-2018 01:26 PM
Updated Date: Mar-26-2018 01:26 PM
Created By: Hannah Steward

Subject: Please Contact this Customer

Touch Point Type: Phone

Assigned User: Hannah Steward

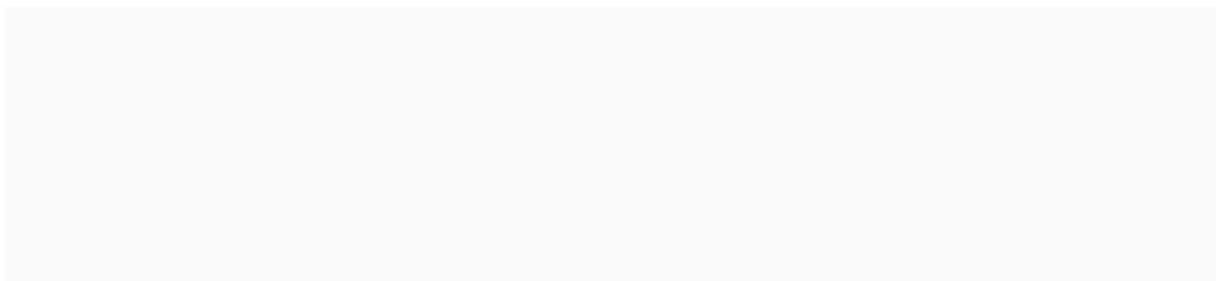
Due Date

Mar-30-2018 12:00 AM

March, 2018

Sun	Mon	Tue	Wed	Thu	Fri	Sat
25	26	27	28	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

Comments: ...renewing his membership.



- If you have contacted this customer by the assigned due date, you can click the box next to Completed.

Touch Point

Add Touch Point

Customer Name: Zap Brannigan
Created Date: Mar-26-2018 01:26 PM
Updated Date: Mar-26-2018 01:26 PM
Created By: Hannah Steward

Subject: Please Contact this Customer

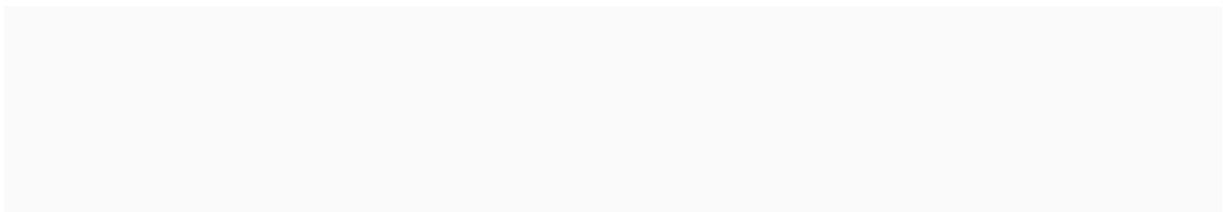
Touch Point Type: Phone

Assigned User: Hannah Steward

Due Date
Mar-30-2018 12:00 AM

Completed

Comments



- If you have any other comments or notes to take about this customer, you can put them in the comment box under the touch point screen. Click **Apply** to save.

Touch Point

Customer Name: Zap Brannigan
Created Date: Mar-26-2018 01:26 PM
Updated Date: Mar-26-2018 01:26 PM
Created By: Hannah Steward

Subject: Please Contact this Customer

Touch Point Type: Phone

Assigned User: Hannah Steward

Due Date
Mar-30-2018 12:00 AM

Completed

Comments: This customer needs to be contacted about renewing his membership.

Apply

14. From this Page, you can also manage the **Account Benefits** for a customer/member (Click to learn how to [Add and Manage Account Benefits in Web Portal](#)).

Account Benefits

+ Add New Account Benefit

15. In Orders, you can review the order history in that customer's record along with a summary of that activity for that order.

Orders

Order Number	Buyer Type	Order Date
6454589	AMS - Standard	Mar-23-2018 10:41 AM

Summary of Activity

Theatre (QA) : Event - General Admission

Count: 5
Amount: 100
Amount (minimum): 10
Amount (maximum): 30
Last Activity Date: 2018-03-23 10:42:09 AM

16. Once you have made all the necessary changes to the customer's record, click the **Save Changes** button at the bottom of the screen.

