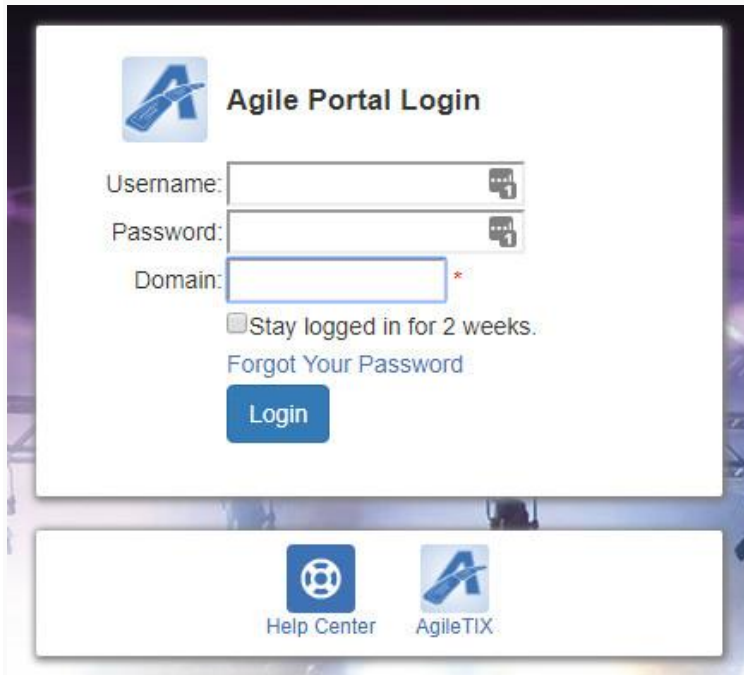


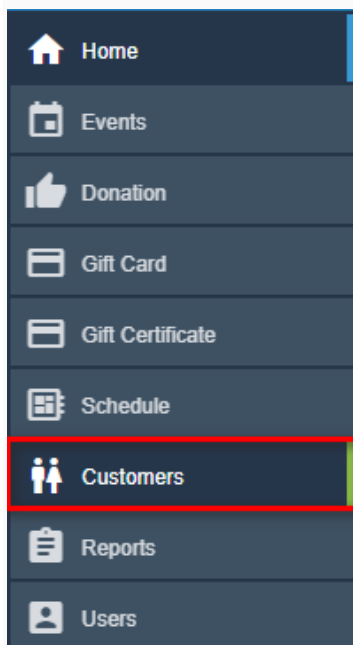
Adding and Managing Account Benefits in Web Portal

1. Go to portal.agiletix.com
2. Log in using your **Username**, **Password**, and **Domain**.




The image shows the Agile Portal Login page. It features a logo with a blue 'A' and a stylized figure. Below the logo is the title "Agile Portal Login". There are three input fields: "Username:", "Password:", and "Domain:". The "Domain:" field has a red asterisk next to it. Below the input fields are a checkbox labeled "Stay logged in for 2 weeks.", a link "Forgot Your Password", and a blue "Login" button. At the bottom of the page, there are two icons: "Help Center" and "AgileTIX".

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




4. In the **Keyword** box, enter the name, phone number, address, or email address of the customer.

The screenshot shows the Agile Theater (QA) interface. At the top, there is a blue header with the text "Agile Theater (QA)" and a gear icon. Below the header, there is a red button labeled "+ ADD CUSTOMER". Underneath, there is a search bar with the text "Zap Brannigan" and a blue "Search" button. Below the search bar, there are three checkboxes: "Exact Match", "Show In-Active", and "Include Related". Below the checkboxes, there is a table with the following data:

	Name	Customer #	Address	Related Customers
	Brannigan, Zap	3929992	55 Main Street Monteagle, TN 373567	

5. Click the **Edit** icon next to the customer's name.

This is a close-up screenshot of the customer table from the previous image. The table has the following data:

	Name	Customer #	Address	Related Customers
	Brannigan, Zap	3929992	55 Main Street Monteagle, TN 373567	

The edit icon (a pencil) is highlighted with a red square.

6. Scroll down to the **Account Benefits** tab.

The screenshot shows the "Customer" account details page. The page has a list of tabs, each with a blue checkmark icon:

- Properties
- Questions : Extra Info
- Questions : Family Membership Info
- Memberships
- Customer Relationships
- Touch Points
- Account Benefits (selected)
- Orders
- Summary of Activity

Below the tabs, there is a button labeled "+ Add New Account Benefit".

7. To add a Benefit for this customer, click the **Add New Account Benefit** button.

8. Select the type of benefit you are adding.



- **Event/Showing Benefit:** Allows you to choose a specific event(s) or showing(s) that the member can use to get tickets based on their benefit level.
- **Catalog Benefit:** Allows the customer to have a benefit for specific items (i.e. T-shirts, Drink Discount, etc.).
- **Membership Benefit:** Used to access discounted memberships or pass types.
- **Package Benefit:** Allows users to access specific packages (e.g. Season Subscription package).
- **Show Benefit:** Allows the organization to restrict the benefit to the entire run of a single Show or Event (e.g. Greatest Movie is showing 10 times in the week, but the member can only select a single date for the entire run. Once they have selected an event in that run, they will not be able to choose another event).

For this example, we will be creating an Event/Showing Benefit.

9. On the **Benefit Page**, name your **Benefit**.

Benefit Name:

10. Then, select your **organization** from the drop-down menu.

Organization:

Agile Demo Sandbox ▼

Agile Art House Sandbox

Agile Demo Sandbox

Agile Film Festival

11. Select the correct **Sales Line Type**. **NOTE:** You **MUST** make sure that this matches the **Sales Line Type** of your **Events**. If you have multiple **Events** with different **Sales Line Types**, you will need to create a **Benefit** for each **Sales Line Type**.

Sales Line Type:

Event - Admission

Event - Admission

12. Next, you will need to select the **Sales Folder** where the events for this benefit are located.

Sales Folder:

All Sales Folders

All Sales Folders

Films

13. If this benefit is for a **Specific Event/Showing**, type the event/show name and select the specific **Event** from the drop-down menu. If all **Events/Showings** are available for this benefit, leave the default as **Nothing Selected**.

Specific Event/Showing

Howl's Moving Castle - 1/15/2018 6:30 PM

14. Specify the **tier** from the drop-down menu.

Specify Tier

Please select value.

Please select value.

General Admission

15. From the drop-down menu, **Specify Ticket Type**.

Specify Ticket Type

Please select value.

Adult

Child

Member

NOTE: If you do not select the correct ticket type for this benefit, the benefit will be open-ended and allow anyone to access the benefit.

16. Next, set your restrictions:

Specify Max Per Item

- 1 +

Specify Max Per Membership

- 1 +

- If you want to restrict how many redemption tickets per item/event that a customer can receive, check mark **Specify Max Per Item** and enter how many tickets per item/event a customer will be able to redeem.
- Make sure to enter the max number of tickets that are available for each pack by entering the amount in **Specify Max Per Membership** area (e.g. If you have a 6-pack, then you will want to limit the number of tickets per member to 6).

17. Finally, select your **Start Date** and **End Date**. The start date is the date when this benefit will be available to the customer. The end date is the day when the benefit will no longer be available.

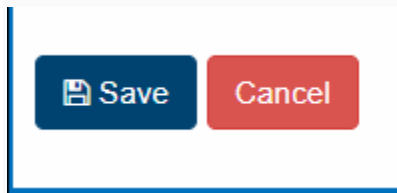
Start date:

Tue, Dec 12, 2017 12:00 AM

End date:


Wed, Dec 12, 2018 11:59 PM

18. Once you have filled out all information, click the **Save** button at the bottom of the screen.



19. If you ever need to edit the benefit(s), click the **Edit** icon next to the benefit name in the customer record.

Account Benefits

	Benefit Name	Start	End	Max Per	Max Overall	Order Qty	Overall Remaining	Enabled	On Membership
	Ticket Pack: Festival Ticket Pack	2019-10-01 12:00 AM	2019-09-11 11:59 PM		10	0	10	<input checked="" type="checkbox"/>	

[+ Add New Account Benefit](#)