Steps to Book an Event or Add New Order

There are a few ways to book an Event or Add New order. The easiest way is to find the customer detail page first by using the **Customer Search field**, then click on the
button.

When making a booking you must make sure you are 100% accurate and correct in following Company Procedures.
If you are ever less than 100% sure, meaning you have a doubt or are unsure of something you must always follow company procedure and know act professionally at all time and follow the FAQ company policy on If unsure on something or anything about my job or role within the company what should I do?

HOW TO BOOK AN EVENT OR ADD NEW ORDER:

1. If you are not in a Customer Details Page then Search for the customer using the **View Customer List** or **Search / Lookup a Customer**

2. If you are in a Customer Details Page proceed with the information below to add a new order.
    1. Press the right button depending the type of call:
        1. Press the **NEW HISTORY** button, if the call is an inbound call.
        2. If you are making a call, an outbound call, then you would already have the clear activity page open, and therefore you can go to the customer details page to begin the order process at step 2.2.
    2. Make sure you are now in the Customer Details Account Page.
    3. Check the customer's first and last name.
    4. Check the **Role / Positions** = if you see N/A or Unknown TBA, ask the customer for their role with the company and select the most appropriate.
    5. Check the **Customer Status** = must always show as ACTIVE. If not then change it before making an order.
    6. Check the **Referred By** = if you see N/A or Unknown TBA, ask the customer for their role with the company and select the most appropriate.
    7. Check the **Phone Numbers** of the Customer.
    8. Check the **Work Email address** of the Customer.
    9. Check the **Personal Email** = you do not need to confirm/check this, only add if customer wishes to provide it.
    10. Check the **Company Name**.
    11. Check the Billing Address of the Company. If the customer gives you the location address, make a note of it for later, but this is the Billing Address and the Billing Address cannot be a PO Box. If the Billing address is the same as the location address, just enter the Billing Address here.
    12. Confirm the Company Type, if it is empty.
    13. Check that the **Company Status** = must always show as ACTIVE. If not then change

it before making an order.
14. Check the **Company / Account Name** = confirm with customer the name of person who handles accounts at the the company. If the customer says to send to them, write their name here (but do not add customer's email in Company / Account Email field)
15. Check the **Region / Zone**. If not showing, press the **Get Region/Zone** Button.
16. **Website** = you do not need to confirm/check this.
17. **Yr Num** = you do not need to confirm/check this.
18. **Total Num** = you do not need to confirm/check this.

3. When you have confirmed all the details of the customer on the Customer Details Account Page, press the **SAVE CHANGES** button.

4. Press **NEW ORDER** button.

5. The New Order Page will open.

6. IN **PART 1 of ADD NEW ORDER CUSTOMER INFO**, all you have to do is press the Use this Address button on the left hand side to bring all the details you confirmed from the customer details page over to the order.
   In **Part 1-Customer Info** it will ask the Billing Details for the Booking. This will be the details of the Customer you are normally speaking with. To make this quick you can press the **USE THIS ADDRESS**. If you press it, it stops you from having to reenter all the details one by one. If you checked the details before, then you only need to press "**Use this address**" and it fills the details automatically. Click on the **Use This Address** button on the far right for the system to automatically populate the saved information from the customer.
   IMPORTANT: by clicking on

   button it will save you from having to re-confirm or re-enter the customer details twice.

    1. You do not have to reconfirm the details as you have already done this.
    2. Check and make sure that the name in the Orders For Name field is the correct name of the customer. If not, reconfirm and make changes here.
7. Press the **NEXT** button.

8. IN **PART 2 of ADD NEW ORDER ITEMS IN ORDER**, this is where you select the product the customer is buying and complete all the required details.
    1. Make sure you have checked the Event Calendar for Product Availability (refer to [When can I book an event? How to check for product availability? How to work out) for product availability page]and the event to be booked is within the Region Radius. Refer to [What is the region or radius to book an event?]on where to book an event.

    2. **Part 2** of **Add an Order** will open up. This is where you will select the Product to book.

       In the Search

       field click in the white box area and type to find the name of the product or event you are going to book for the customer.

- Move to the next step unless you are not able to find the product using the Search Product Box then you can click on

  and browse for the product or event by category.

4. After selecting your product or event, complete the required fields with precision. Be very specific.

   It opens up the Customize page. here we have to select the correct details. This is very important because if the details are wrong the crew will have problems with arriving and setting up the event. If you are unsure with any of the details, either ask the customer or put the customer on hold and request help on SLACK.

   COMPLETE ALL THE DETAILS CORRECTLY.

   With regards to the Quantity, ensure you inform the customer that the number of tickets purchased are required to be paid for. If the customer is not sure of the exact number, encourage the customer that they could either by the minimum amount or we recommend that 10-15% less than what they think would be best. Let them know that any additional tickets after the original booking would be charged at the same rate.

   If the product requires a time always enter it the correct way. 9am would be incorrect. Always enter an hour, then :, then minutes, then am or pm. Example. always 9:00am or 11:30pm or 1:35pm. These are correct times.

   Remember that if a product requires an Event Date, the date must be available for that region. If the date required is on an empty week (meaning) a week where no other events are booked remember that date would not be best because it was on an empty week. if that happens remember you need to ask a team supervisor for permission or find a week where other events are on near their area. For additional information on selecting the best date refer to (refer to When can I book an event? How to check for product availability? How to work out)

   OPTIONS TAB: Make sure you if the Product has an OPTIONS TAB, complete the details in full. The more information, the less chance of an error or mistake being made.

   IMPORTANT NOTICE: Only one item, one product or one timed product can be added in each Item Line.
   An event/show/performance is classified as a Product.
   Where a customer wants multiple events/shows/performances/products which can be classified as
   * A different time
   * A different date
   * A different age group
   * A different location

   Remember that each product is specific to itself and should always be listed as each individual item.
   If you are unsure follow company policy ... If unsure on something or anything about my job or role within the company what should I do?

5. When all fields are completed click on

6. Confirm the price per ticket and show cost to the customer and if inform the customer if a deposit is required as shown on the system. If it does not mention a deposit move to the next step.

7. Scroll down and Click on
 button.

8. **Additional things you may use**, but it is rare when doing a booking are:
    1. If you want to **Edit the product** click on the

       button to the far right of the product and select

    2. If you want to **Copy the product** to make a duplicate event booked for the same customer click on the

       button to the far right of the product and select
       Copy Option.

    3. If you to **want Delete the product** to make a duplicate event booked for the same customer click on the

       button to the far right of the product and select
       Delete option.

9. In **Part 3 - Location and Transport** ... Confirm with the customer that the event will be setup and performed at the

   location address as shown. In **Part (3) Location and Transport**. you only need to check and ask if the details are correct. Confirm with the customer that they will be the main contact and the address for the show will be as shown.

    1. Ask the customer if they will be the main contact on the day of the event.

        1. If they say NO, press the New Single Address button and enter the name and confirm the name of the person who will be the contact at the location where the product will be.
        2. If they say YES, then confirm with them the address that the event product will be at.
            1. If they confirm the address is the one displayed on the screen then move to point 2 below (NEXT)
            2. If they say the address for the location of the event product is different to the one displayed press **New Single Address**
               If they say **NO** or the address or details or contact name is different to the name of the Billing Customer click on

            3. Click on the **Use This Address** button on the far right for the system

to automatically populate the saved information from the customer. IMPORTANT: by clicking on

button it will help you then can add or edit the related fields. Scroll down through each field and edit with the correct information from the customer.

1. Confirm the name of the actual customer who will be the main contact at the venue on the day of the event. Add their First Name and Last Name.
2. Confirm the **Direct Phone Number** for the new contact
3. Confirm the **Role/Position/Title** of the new contact.
4. Confirm the **Mobile** of the new contact.
    1. Sometimes the person you are speaking with may not know the new contact's mobile number or does not want to give it out. If this is the case, leave the field blank.
5. Confirm the **Company** of the new contact. (many times it will be the same company, however it still needs to be confirmed).
6. Confirm the **Company Phone Number** of the new contact. (many times it will be the same as the company you are doing the purchase for, however it still needs to be confirmed).
7. Confirm the **Company Email** of the new contact. (this is the actual email address of the new main contact, not the company email address for the company).
8. Confirm the **Fax Number** of the new contact. (many times it will be the same as the company you are doing the purchase for, however it still needs to be confirmed).
9. Confirm the **Location Address** of where the event will be with the new contact. (many times it will be the same as the company you are doing the purchase for, however it still needs to be confirmed).
10. Confirm the **Location Country** of where the event will be with the new contact. (many times it will be the same as the company you are doing the purchase for, however it still needs to be confirmed).
11. Confirm the **Location State** of where the event will be with the new contact. (many times it will be the same as the company you are doing the purchase for, however it still needs to be confirmed).
12. Confirm the **Location Suburb/Town** of where the event will be with the new contact. (many times it will be the same as the company you are doing the purchase for, however it still needs to be confirmed).
13. Confirm the **Location Postcode** of where the event will be with the new contact. (many times it will be the same as the company you are doing the purchase for, however it still needs to be confirmed).
14. Make sure you have "Save to Customer's Address Book" checked, for future reference.
15. **Location Details Method:**
    1. At Iconic Productions we rarely charge a location fee, however Check with @eventmanagers if there is to be a charge before moving on.
    2. If a fee/charge does apply @eventmanagers will tell you want to do, otherwise skip this and move to the next step below.

2. Scroll down and Click on
   button.

10. **You are now in Part 4, the Payment and Completion of the Purchase of the product. Take your time here and be very accurate and clear with what you are saying and doing. Mistakes cost us money and make us look very unprofessional.**
    1. Confirm all the details with the Customer again as displayed on the screen.
        1. Confirm the **Billing Details** as displayed.
        2. Confirm the **Location and Transport Details** as displayed.
        3. Confirm the **Item Description of the Product Purchased Details** as displayed.
            1. Confirm the **Qty and Item Price and Item Total** as displayed.
    2. Scroll down where it says 'Terms and Conditions. Read and confirm the following conditions with customer and tick each box when customer accepts/agrees to T & C's. Press the RECORD button to commence the proof of purchase of the product. '
        1. Press the **RECORD** button.
        2. Read out the first line to the customer.
        3. When the customer confirms it or says Yes or acknowledges it, press the checkbox on 1.
        4. Read out the second line to the customer.
        5. When the customer confirms it or says Yes or acknowledges it, press the checkbox on 2.
        6. Repeat this for each line as displayed until the very end of all lines.
        7. If the customer has any questions, you can always answer them and then repeat the T&C again to gain acceptance from the customer.
        8. IMPORTANT: All check-boxes must be ticked before a purchase can be made.
    3. Ask Customer how they would like to pay. Select the correct payment method informed by the customer in

       window. IMPORTANT: Do not select Pay-Pal.
    4. **PAYMENT OPTIONS:**
        1. **TAX INVOICE:**
            1. If the customer requests a Tax Invoice, you need to ask for the email address for the Accounts Person. Also ask for name of the person who handles account and write the name of the accounts person in the Staff Notes field with (Accounts Name: ******)
        2. **Credit Card (PINPAYMENTS)**
            1. Inform the customer that a Bank Credit Card fee will be added to the total cost. Most customers accept this.
            2. Select Credit Card PinPayments
            3. Inform the Customer of the total amount that will be charged to the card.
            4. Ask for the Name of the Card. This has to be entered 100% accurate (no mistakes)
            5. Ask for the Credit Card Number, Expiry and CVC number. This has to be entered 100% accurate (no mistakes)

    6. Ask for the email address they want the receipt to be sent to for the purchase. This has to be entered 100% accurate (no mistakes)
    7. The address is a security measure we take and is often the address of the Company Bill Details or if it is individual sale then it would be the address the card is connected with. This needs to be confirmed with the customer as in you are confirming the billing address details for the purchase by credit card.
5. Ask customer if they want the booking order to go to someone elses email address.
    1. If they say YES click on
    2. Enter the email address and then in Staff Notes, write the name of the person whose email address you entered here.
    3. Repeat if necessary.

6. **DEPOSITS:**
    1. **DEPOSITS:** At times, customers will be required to pay a deposit to secure the event date. If is the case the system will display the item below in Orders Summary. If this is the case select **Yes**. and you can inform the customer of the deposit amount required to be paid.
       .

7. **COUPONS / DISCOUNTS:**
    1. If the customer has a discount or coupon code, Scroll up to where it says Coupon or Gift Certificate, enter the code and press apply for the discounts or coupons. If customer has a coupon code, add this for the discount or else scroll down.

8. In the **Order Comments** field you an add additional comments that are visible to the Customer.
   IMPORTANT: Remember anything you enter in the Order Commets will be seen by the customer.

9. In the **Staff Notes** you can add comments about the customer or order that is **ONLY VISIBLE BY STAFF**.

1. Before pressing the **Add New Order** button inform the customer of the following ...
    1. Inform the customer about the **confirmation purchase email** using the following speech text:
        1. "The confirmation of your purchase today will be sent to you on your email address that we confirmed earlier and you should receive the email within 10-30 minutes. The email is a very long email and sometimes it goes into people's spam or junk mail inboxes. If you don't receive the confirmation purchase email within the next 30 minutes please check your spam or junk mail and it possibly will be there for you".
    2. Promote the experience of Iconic Productions to the customer using the following speech text:
        1. "Here at Iconic Productions we like to make your experience with Iconic, every way exciting and Iconic and before we finish today if there is anything else that I can do to make your experience amazing".

2. Answer any questions professionally. If you are unsure of the answer, ask @eventmanagers (if you need to put the customer on hold do this).

3. Thank the customer for using our services using the following speech text:
   1. "Thank you for using Iconic Productions and have a pleasant day."
2. Click on

   to complete the purchase and add the booking and finalise order into Iconic's ERM system.

3. You have completed your booking. **CONGRATULATIONS.**

11. Go to the NEW HISTORY page that you opened up at the beginning and enter the details there or if you are clearing an activity clear it now and create your followup activity.

Questions Asked and Answered:

1. David Phillip | 06-May-2020 07:35 |
   Question: Why does Iconic not accept PayPal?
   a. answered by @peter.murphy | 11-May-2020 12:20 |
      a. The USA office has a matter in court against PayPal and waiting for settlement.

Unique solution ID: #1320
Author: Matthew Walker
Last update: 11-Mar-2020 08:43