



Ticketing | Registration | Memberships | Retail

Web | Mobile | Kiosk | POS

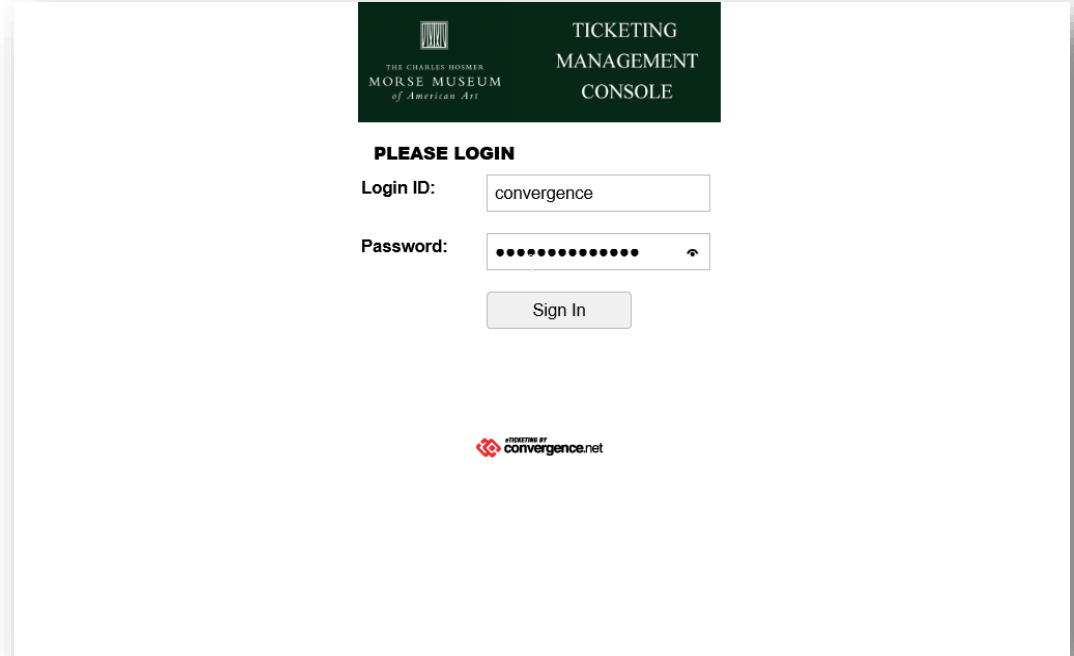
Groups, Memberships, and Household Accounts Online Training Manual



Login Page

Login Page:

1. Go to admissions.morsemuseum.org
2. Each user will have his/her own sign in credentials.
3. We do not limit the number of user licenses/accounts.
4. Sharing of user accounts is highly discouraged.
5. Each user can be configured with a unique set of permissions according to their role/function.



The screenshot shows the login interface for the Morse Museum Ticketing Management Console. At the top, there is a dark green header with the Morse Museum logo on the left and the text "TICKETING MANAGEMENT CONSOLE" on the right. Below the header, the text "PLEASE LOGIN" is centered. The login form consists of two input fields: "Login ID:" with the value "convergence" and "Password:" with a masked password of 12 dots and a show/hide icon. A "Sign In" button is positioned below the password field. At the bottom center, there is a small logo for "TICKETING BY convergence.net".

Household Lookup Page:

1. Go to “Household Lookup”
2. Check to see if the customer is already a member.
3. You can search for a customer by first and last name, email, address, household account, organization or member # and search for their account.
4. If you are unable to locate their account by using the “Search Customer Accounts” button, use the “Search memberships” button. *If you still can not locate that customer info, click “Create account” and follow the page below.
5. Once you have located the account, Select the account..

Household Accounts Creation

Customer accounts creation

- In the left hand navigation go to “Household Look up”
- Ask if the customer is currently a member.
- If they are not and are purchasing other tickets, click “create new account”.
- Request from the customer the complete list of fields located on the form page and Click “SUBMIT”. This will expedite the checkout process when address etc. is needed for payment and delivery of confirmation.
- Then “Select” the appropriate account.

Organization Customer Account Processing

Household Contact Information (* Required fields)

Organization:

First Name: *

Last Name: *

Sex: *

Phone: *

Email: *

Member No: (Convergence internal)

Address 1: *

Suite / Apt:

City: *

State:

Province/Other:

Zip / Postal Code: *

Country: *

Password:

Account Type:

Organization Customer Account Processing

Household Fast Lookup

Organization:

First Name:

Last Name:

Phone Number:

Email:

MemberNo:

Account Type:

Imported HHR#:

Imported Constituent#:

Keywords: First Name, Last name, phone, email, and/or memberid

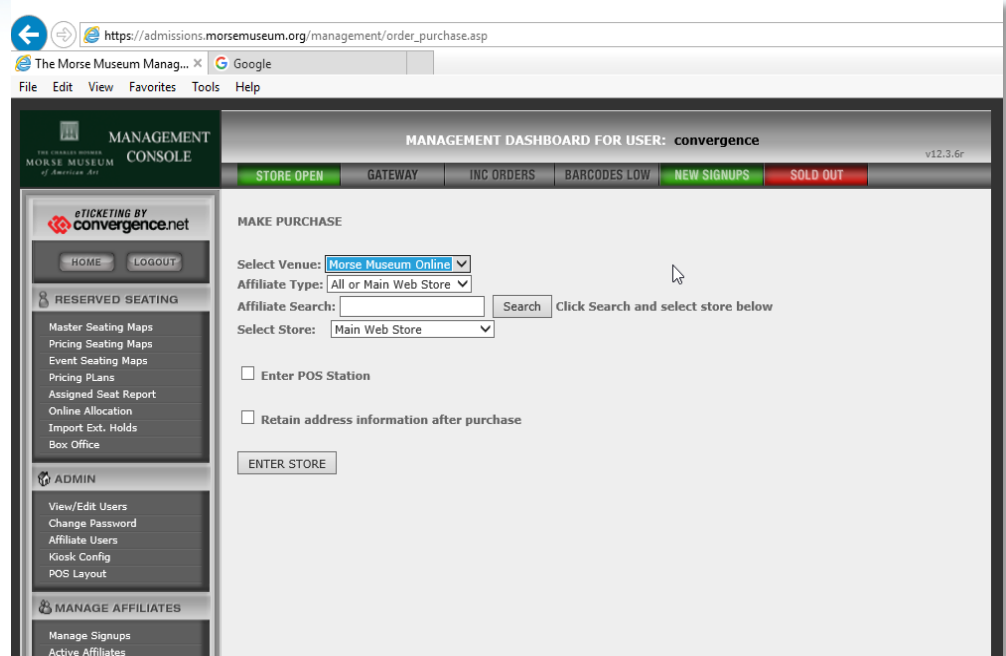
Include Customer Household Accounts

Account Search Results(first 1000 records) key:

| AccID | Type | Name | Organization | MemberID (MemberNo) | Member Exp | Member Status | Phone | Email | Address | City |
|--------|------|------|--------------|---------------------|------------|---------------|--------------|--------------------------|----------|------|
| SELECT | 2023 | 0 | Test, Daven | 11192(7860) | 9/19/2018 | -1 | | daam7777@convergence.net | 111 test | test |
| SELECT | 2023 | 0 | test, test | 11192(7860) | 9/19/2018 | -1 | 111-111-1111 | daam7777@convergence.net | 111 test | test |

Back-office purchase

- Then locate “Make Purchase” in the left hand navigation
- Select venue “Morse Museum Online” and Affiliate Type “All or Main Webstore” and Select Store “Main Web Store” and then click “ENTER STORE”.
- You will be taken to the product store page where you can select your desired product.
- At the top of the page there will be category buttons that contain your different ticket types.
- Click on the appropriate category to see your desired product.



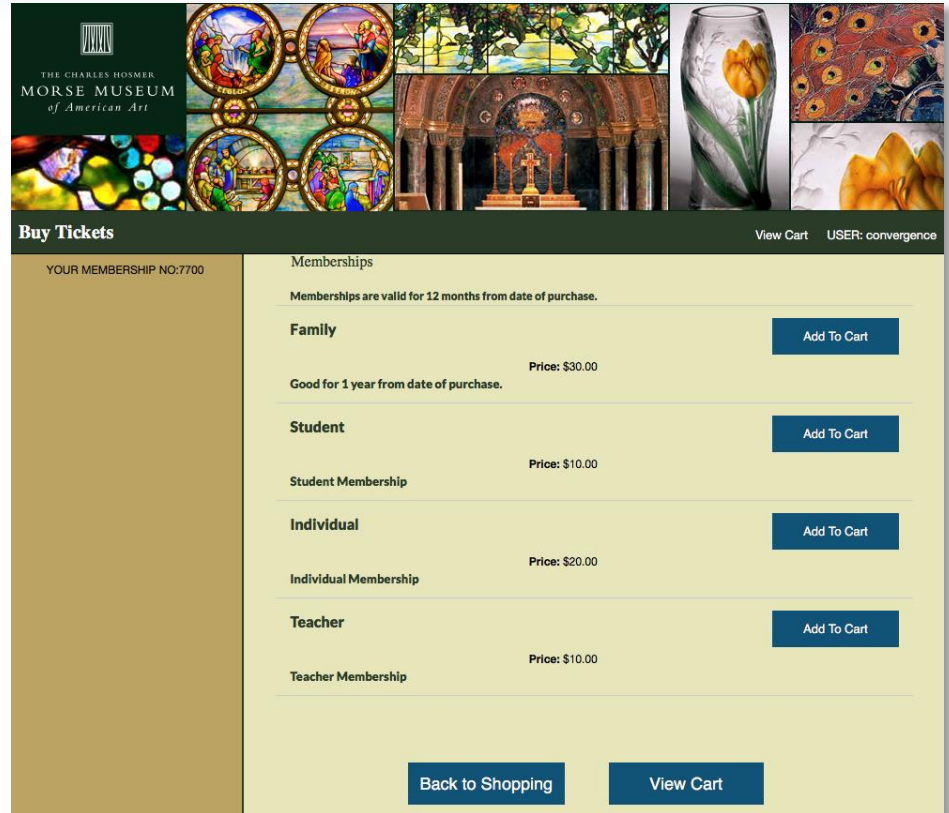
The screenshot shows a web browser window with the URL https://admissions.morsemuseum.org/management/order_purchase.asp. The page is titled "MANAGEMENT DASHBOARD FOR USER: convergence" and includes a version number "v12.3.6r". At the top, there are navigation buttons: "STORE OPEN" (green), "GATEWAY", "INC ORDERS", "BARCODES LOW", "NEW SIGNUPS" (green), and "SOLD OUT" (red). The main content area is titled "MAKE PURCHASE" and contains the following form fields:

- Select Venue: Morse Museum Online (dropdown menu)
- Affiliate Type: All or Main Web Store (dropdown menu)
- Affiliate Search: [text input] [Search button] Click Search and select store below
- Select Store: Main Web Store (dropdown menu)
- Enter POS Station
- Retain address information after purchase
- ENTER STORE button

The left sidebar contains navigation menus for "RESERVED SEATING" (Master Seating Maps, Pricing Seating Maps, Event Seating Maps, Pricing Plans, Assigned Seat Report, Online Allocation, Import Ext. Holds, Box Office), "ADMIN" (View/Edit Users, Change Password, Affiliate Users, Kiosk Config, POS Layout), and "MANAGE AFFILIATES" (Manage Signups, Active Affiliates). The top left of the sidebar features "eTICKETING BY convergence.net" with "HOME" and "LOGOUT" buttons.

Back-office Membership purchase

- Select a membership type, select “ADD TO CART”.



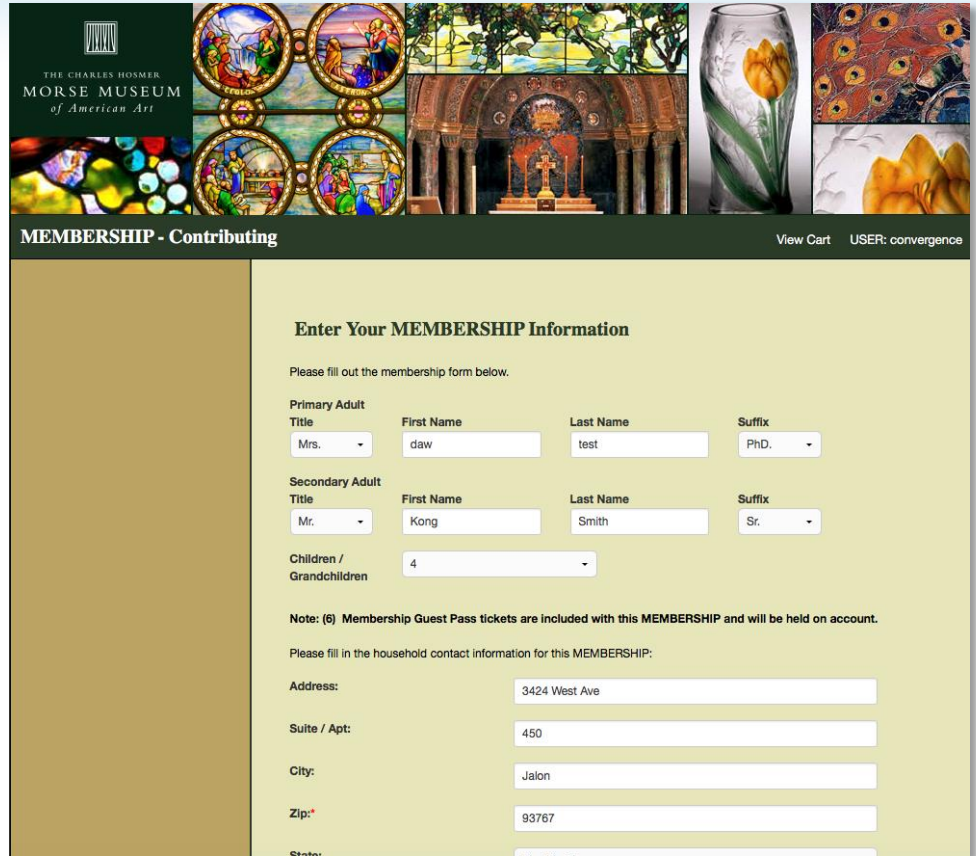
The screenshot shows a web interface for purchasing memberships at the Morse Museum of American Art. The header features a collage of art images and the text "THE CHARLES HOSMER MORSE MUSEUM of American Art". Below the header is a "Buy Tickets" section with a "View Cart" link and "USER: convergence". The main content area is titled "Memberships" and includes the text "Memberships are valid for 12 months from date of purchase." and "YOUR MEMBERSHIP NO:7700". The membership options are listed in a table:

| Membership Type | Price | Action |
|-----------------|---------|-------------|
| Family | \$30.00 | Add To Cart |
| Student | \$10.00 | Add To Cart |
| Individual | \$20.00 | Add To Cart |
| Teacher | \$10.00 | Add To Cart |

At the bottom of the page, there are "Back to Shopping" and "View Cart" buttons.

Back-office Memberships Form

- You will be taken to the membership form page. Most of the member info will be auto-filled with the household account info that was provided. If there is a secondary adult and children qty, please fill that out.
- You will see at the bottom of the form the number of included guest passes they have on account and mention that to the customer.
- Submit the form and proceed to cart.



MEMBERSHIP - Contributing View Cart USER: convergence

Enter Your MEMBERSHIP Information

Please fill out the membership form below.

Primary Adult

| | | | |
|--------|------------|-----------|--------|
| Title | First Name | Last Name | Suffix |
| Mrs. ▾ | daw | test | PhD. ▾ |

Secondary Adult

| | | | |
|-------|------------|-----------|--------|
| Title | First Name | Last Name | Suffix |
| Mr. ▾ | Kong | Smith | Sr. ▾ |

Children / Grandchildren: 4 ▾

Note: (6) Membership Guest Pass tickets are included with this MEMBERSHIP and will be held on account.

Please fill in the household contact information for this MEMBERSHIP:

Address: 3424 West Ave

Suite / Apt: 450

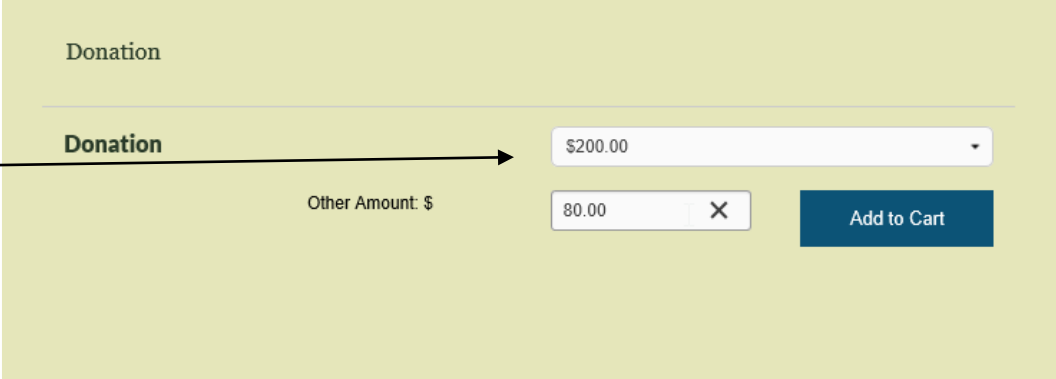
City: Jalon

Zip: 93767

State:

Back Office Donation purchase

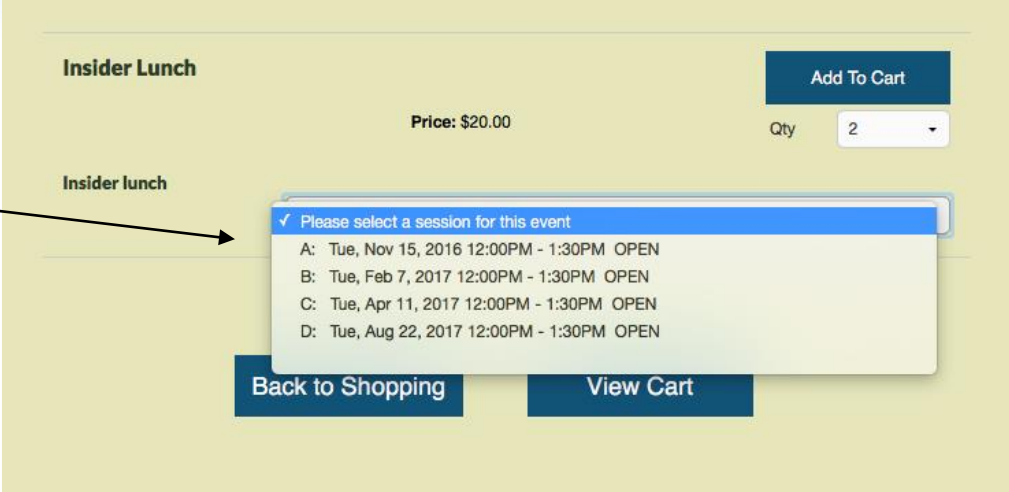
- If you select a donation, select an amount from the drop down or key in a dollar amount, then click “ADD TO CART”.
- You will be taken to the donation form page.
- Add donor’s first and last name (should be auto-filled by the customer account info)
- Submit the form and proceed to cart.



The screenshot shows a donation form on a light green background. At the top, the word "Donation" is displayed. Below it, there is a horizontal line. Underneath the line, the word "Donation" is followed by a right-pointing arrow. To the right of the arrow is a dropdown menu showing "\$200.00". Below the dropdown, the text "Other Amount: \$" is followed by a text input field containing "80.00" and a clear button with an "X". To the right of the input field is a blue button labeled "Add to Cart".

Back-office Insider Lunch purchase

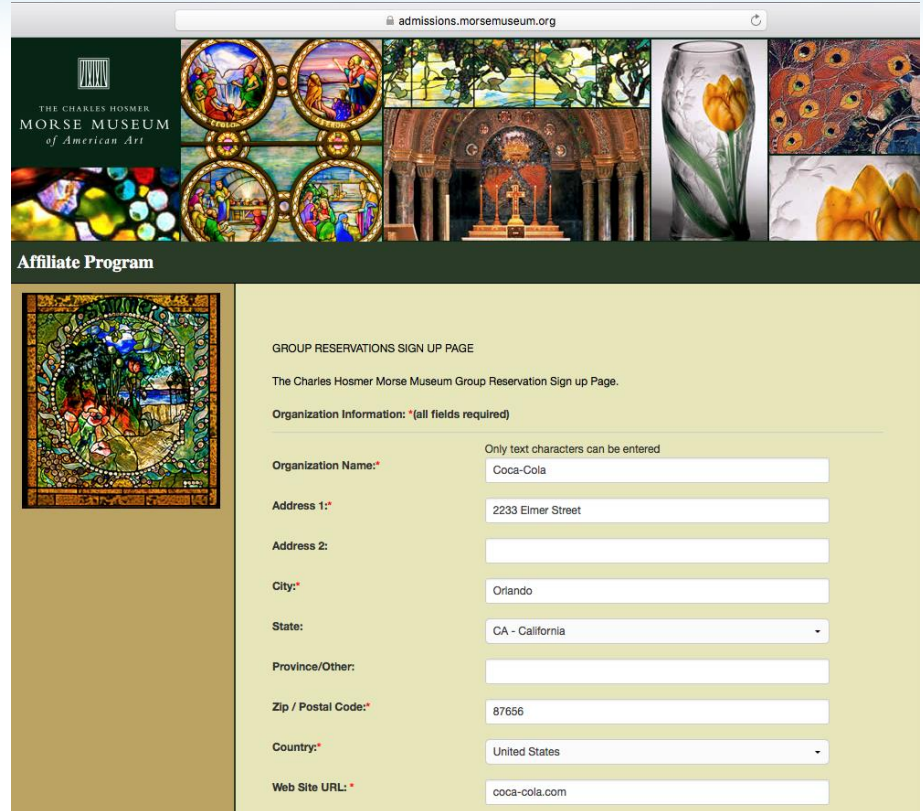
- Select an Insider Lunch (Registration), select the desired session and quantity.
- You will be taken to the registration form page (should be auto-filled with the household account info that was provided)
- Submit the form and you be taken to the Cart page.



The screenshot shows a product page for "Insider Lunch". The product name is "Insider Lunch" and the price is "\$20.00". There is a quantity selector set to "2" and an "Add To Cart" button. Below the product name, there is a dropdown menu for "Insider lunch" which is currently open, showing a list of sessions: "A: Tue, Nov 15, 2016 12:00PM - 1:30PM OPEN", "B: Tue, Feb 7, 2017 12:00PM - 1:30PM OPEN", "C: Tue, Apr 11, 2017 12:00PM - 1:30PM OPEN", and "D: Tue, Aug 22, 2017 12:00PM - 1:30PM OPEN". At the bottom of the page, there are "Back to Shopping" and "View Cart" buttons. An arrow from the first bullet point in the list on the left points to the session selection dropdown.

Creating a new Group

- Go the admissions.morsemuseum.org/signups/affiliates.asp
- Fill out the entire application form



admissions.morsemuseum.org

THE CHARLES HOSMER MORSE MUSEUM of American Art

Affiliate Program

GROUP RESERVATIONS SIGN UP PAGE

The Charles Hosmer Morse Museum Group Reservation Sign up Page.

Organization Information: *(all fields required)

Organization Name:* Only text characters can be entered

Address 1:*

Address 2:

City:*

State:

Province/Other:

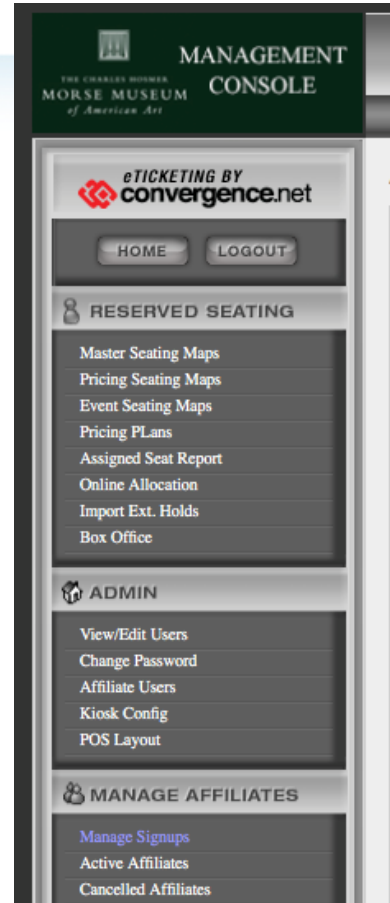
Zip / Postal Code:*

Country:*

Web Site URL: *

Creating a new Group

- Login to your account
- Click on Manage Sign ups



Creating a new Group

(Separate by ",". Leave blank to allow all addresses.)

Ticket Store User Name:
(Can Be Used Instead of Link)

Convergence

*Ticket Types:

Group Tours

Group Tours Add-ons

Venues:

Morse Museum Online

*Home Venue:

ALL - Corporate Account

- Make sure that Group Tours, Group Tours Add-ons and Morse Museum Online is checked off
- Select the appropriate payment type

(Separate by ",". Leave blank to allow all addresses.)

Ticket Store User Name:
(Can Be Used Instead of Link)

Convergence

*Ticket Types:

Group Tours

Group Tours Add-ons

Venues:

Morse Museum Online

*Home Venue:

ALL - Corporate Account

Payment Type:

Pay at Gate

Suppress Fees:

Do not charge ticket or order fees for this Affiliate

Tax Selection:

Charge sales tax for this Affiliate

One Time Use:

Promotional Store - 1 order per customer

Ticket Store Status:

Open

Annual Ticket Goal/Limit:

1000

Internal Note:

Link Login Message:

(this is displayed on the Affiliate Link access page. Leave blank and the Store Welcome Message will be displayed by default)

Link Password Message:

(Leave this blank for the default message)

Creating a new Group

- Select “Approved”
- Click “Update Profile”
- Then select “Assign Tickets”

Account Representative Information

*First Name:

*Last Name:

*Title:

E-Mail (Management User Name):

Confirm E-Mail:

Temporary Management Password:

*Telephone(Day): ext.

Use Contact in Checkout: Populates checkout page during orders. (not for at-home orders)

First Name (Alternate):

Last Name (Alternate):

Title (Alternate):

E-Mail (Alternate):

Telephone(Alternate): ext.

Affiliate Sub-Users

Allow "Type 1 (Administrator)" Sub-Users to "Manage Users":

Manage Sub-Users

Account Status:

NEW Password Rules:
(1) 8-15 characters in length
(2) Contain one lower case letter
(3) Contain any 2 of the following:
a) Uppercase letter
b) Number
c) Special character

Account is NOT locked

Lock Account

New Password:

Update

Creating a new Group

- Click the green check and this icon will select all your tickets that are for your groups.
- Click “ASSIGN TICKETS”
- You can also uncheck all by clicking the red “X”.
- You can check and uncheck individual products an assign special pricing

ASSIGN TICKETS TO - Diamond Tours Inc (Fort Myers, FL)

Select Venue:

ALL

Search

| Ticket | Ticket Type | Pricing Code | SKU | Venue | Regular Price | Affiliate Price | Employee Price | Quantity Limit | ✓ ✕ |
|------------------------|---------------------|--------------|-------|-------|---------------|-----------------|----------------|----------------|-----|
| Group Reservation | Group Tours | | 70100 | MMWEB | \$0.00 | \$ 0 | \$ 0 | 1 | ✓ |
| Group Tour Adult | Group Tours Add-ons | | 60100 | MMWEB | \$4.00 | \$ 4 | \$ 4 | 100 | ✓ |
| Group Tour Comp | Group Tours Add-ons | | 60104 | MMWEB | \$0.00 | \$ 0 | \$ 0 | 100 | ✓ |
| Group Tour Home School | Group Tours Add-ons | | 60103 | MMWEB | \$0.00 | \$ 0 | \$ 0 | 100 | ✓ |
| Group Tour Leaders | Group Tours Add-ons | | 60102 | MMWEB | \$0.00 | \$ 0 | \$ 0 | 100 | ✓ |
| Group Tour Student | Group Tours Add-ons | | 60101 | MMWEB | \$1.00 | \$ 1 | \$ 1 | 100 | ✓ |

ASSIGN TICKETS

RETURN TO PROFILE

Login our create a household account

- Go to Household look up
- Then search for the person's name, Organization, phone number, Email, Member No:
- Click "Search Customer Accounts" you can also try "Search Memberships"
- Otherwise select "Create New Account"
- Fill out the complete form

Organization Customer Account Processing

Household Fast Lookup

Organization:

First Name:

Last Name:

Phone Number:

Email:

MemberNo:

Account Type: ▾

Imported HH#:

Imported Constituent#:

Keywords: First Name, Last name, phone, email, and/or memberid

Include Customer Household Accounts

Account Search Results(first 1000 records) key:

| AcctID | Type | Name | Organization | MemberID(MemberNo) | Member Exp | Member Status | Phone | Email | Address | City | Zipcode |
|--------|------|------|--------------|--------------------|------------|---------------|-------|-------|---------|------|---------|
|--------|------|------|--------------|--------------------|------------|---------------|-------|-------|---------|------|---------|

Login or create a household account

- Select the appropriate customer account by clicking “SELECT”
- Then go to “MAKE PURCHASE”

Organization Customer Account Processing

Household Feat Lookup

Organization:


First Name:

Last Name:

Phone Number:

Email:

MemberNo:

Account Type: 

Imported HMR:

Imported Constituent#:

Keywords: First Name, Last name, phone, email, and/or memberid

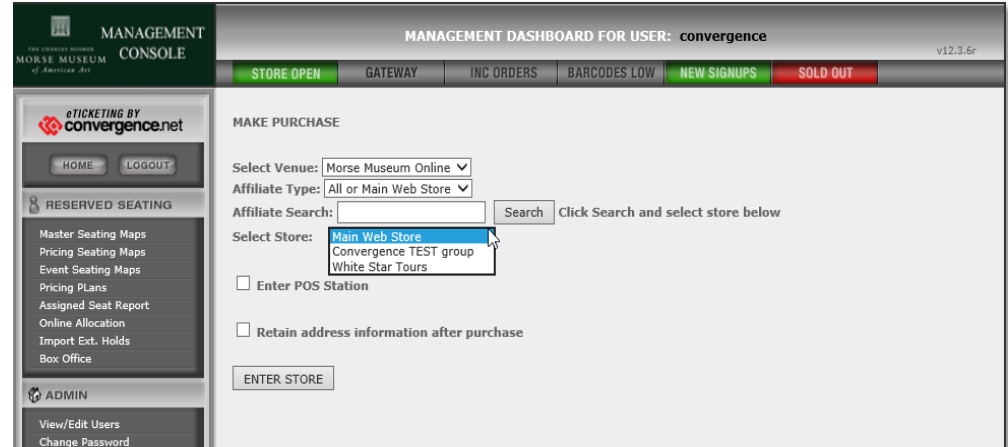
Include Customer Household Accounts

Account Search Results(first 1000 records) key:

| | AcctID | Type | Name | Organization | MemberID(MemberNo) | Member Exp | Member Status | Phone | Email | Address | City | Zipcode |
|---------------------------------------|--------|------|---------------|--------------|--------------------|------------|---------------|--------------|-------------------------|--------------|-----------|---------|
| <input type="button" value="SELECT"/> | 2020 | | test, Cameron | Testers | 11188(7653) | 9/18/2017 | -1 | 123-123-1234 | cmcphie@convergence.net | 123 test cir | test town | 12345 |
| <input type="button" value="SELECT"/> | 2010 | | test, carrie | | 11124(7594) | 9/14/2017 | -1 | | cbarton@convergence.net | 123 St | Anytown | 11111 |
| <input type="button" value="SELECT"/> | 2010 | | test, carrie | | 11124(7594) | 9/14/2017 | -1 | | cbarton@convergence.net | 123 St | Anytown | 11111 |
| <input type="button" value="SELECT"/> | 2010 | | test, carrie | | 11124(7594) | 9/14/2017 | -1 | | cbarton@convergence.net | 123 St | Anytown | 11111 |
| <input type="button" value="SELECT"/> | 2010 | | test, carrie | | 11124(7594) | 9/14/2017 | -1 | | cbarton@convergence.net | 123 St | Anytown | 11111 |
| <input type="button" value="SELECT"/> | 2010 | | test, carrie | | 11124(7594) | 9/14/2017 | -1 | | cbarton@convergence.net | 123 St | Anytown | 11111 |
| <input type="button" value="SELECT"/> | 2010 | | test, carrie | | 11124(7594) | 9/14/2017 | -1 | | cbarton@convergence.net | 123 St | Anytown | 11111 |
| <input type="button" value="SELECT"/> | 2010 | | test, carrie | | 11124(7594) | 9/14/2017 | -1 | 123-456-7890 | cbarton@convergence.net | 123 St | Anytown | 11111 |

Group Reservations

- Go to “Make Purchase”
- Select the desired preset group under “Select Store” or use the General Group Reservations if this is a one-time group
- *If the group plans to visit on a more regular basis sign them up for their own group store. Go to: <https://admissions.morsemuseum.org/signups/affiliates.asp>. Your pm will train you on this process.
- Click “ENTER STORE”



The screenshot shows the 'MANAGEMENT DASHBOARD FOR USER: convergence' interface. The top navigation bar includes 'STORE OPEN', 'GATEWAY', 'INC ORDERS', 'BARCODES LOW', 'NEW SIGNUPS', and 'SOLD OUT'. The left sidebar contains navigation options: 'HOME', 'LOGOUT', 'RESERVED SEATING' (with sub-options: Master Seating Maps, Pricing Seating Maps, Event Seating Maps, Pricing Plans, Assigned Seat Report, Online Allocation, Import Ext. Holds, Box Office), and 'ADMIN' (with sub-options: View/Edit Users, Change Password).

The main content area is titled 'MAKE PURCHASE' and contains the following fields and options:

- Select Venue: Morse Museum Online (dropdown)
- Affiliate Type: All or Main Web Store (dropdown)
- Affiliate Search: [text input] [Search button] Click Search and select store below
- Select Store: [dropdown menu showing 'Main Web Store', 'Convergence TEST group', and 'White Star Tours']
- Enter POS Station
- Retain address information after purchase
- [ENTER STORE button]

Group Reservations

1. Select the “GROUP TOURS” and select “ADD TO CART”
2. Select the day and time of arrival for the group
3. At the bottom of each page the availability of spaces displays so you can select another day or time that suits your group size.

Welcome Convergence TEST group employees! Welcome to the Tickets & More Online Store where you can buy discounted admission.

We hope you enjoy your visit!

[Group Tours](#) [Group Tours Add-ons](#)

Group Tours

Group Reservation [Add To Cart](#)

Group reservation package

SELECT A DAY FOR: Group Reservation

Available on Tuesday, November 01, 2016
AVAILABLE!

| Su | Mo | Tu | We | Th | Fr | Sa |
|----|----|----|----|----|----|----|
| | | 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 | | | |

Available Unavailable Selected

| | | |
|-------------|--------------------------------|---------------------------------------|
| Season 2016 | Time: Tue, Nov 1, 2016 9:45AM | OPEN <input type="radio"/> |
| Season 2016 | Time: Tue, Nov 1, 2016 10:00AM | OPEN <input checked="" type="radio"/> |
| Season 2016 | Time: Tue, Nov 1, 2016 10:15AM | OPEN <input type="radio"/> |
| Season 2016 | Time: Tue, Nov 1, 2016 10:30AM | OPEN <input type="radio"/> |
| Season 2016 | Time: Tue, Nov 1, 2016 10:45AM | OPEN <input type="radio"/> |
| Season 2016 | Time: Tue, Nov 1, 2016 11:00AM | OPEN <input type="radio"/> |
| Season 2016 | | |

OPTIONAL ACTIVITY AVAILABILITY
This Program has some optional add-on activities that have reduced availabilities on this date. If important activities to your visit have insufficient availability on this date, please select a different date.

Group Tour Adult: Avail. (77 - 100)
Group Tour Comp: Avail. (77 - 100)
Group Tour Home School: Avail. (77 - 100)
Group Tour Leaders: Avail. (77 - 100)
Group Tour Student: Avail. (77 - 100)

[Cancel](#) [Continue](#)

Group Reservations Form

- Complete the groups registration form and add the appropriate group tickets needed for the group and click “CONTINUE”

Group Reservation - Season 2016

Please fill out the group reservation tour form.

First Name 1*

Mary

Last Name 1*

Lee

Group Name*

Smith Grocers

Please add the number of guests in your party.

| Item | Qty | Product or Event Selection | Price |
|------|-----|---|--------|
| 1 | 19 | Group Tour Adult Season 2016: Tue, Nov 1, 2016 10:00AM Avail. | \$4.00 |
| 2 | 3 | 18 and older Group Tour Comp Season 2016: Tue, Nov 1, 2016 10:00AM Avail. | \$0.00 |
| 3 | 0 | Group Tour Comp Group Tour Home School Please select your choice | \$0.00 |
| 4 | 0 | Group Tour Home School Group Tour Leaders Please select your choice | \$0.00 |
| 5 | 0 | Group Tour Leaders Group Tour Student | \$1.00 |

D

1

S

2

Requesting a guided tour?

Yes

Age level of your reservation?

Grade 12

Requesting Winter Park or Morse Museum?

Please Select
Winter Park
Morse Museum
Both

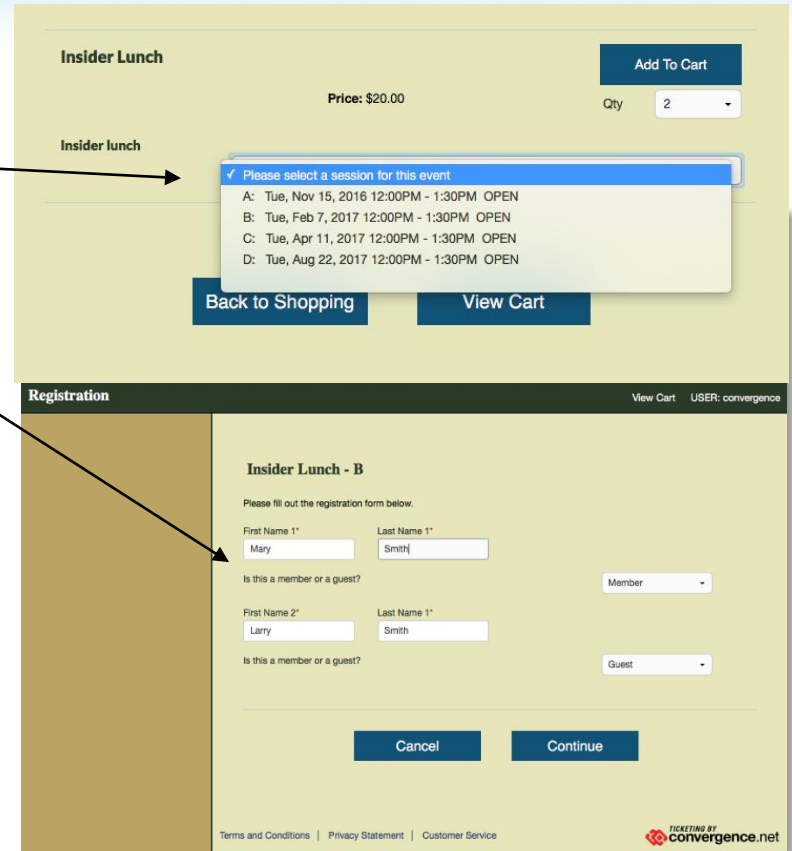
Any special requirements for your group?

Wheel chair access needed

Insider Lunch Form Page

Registration Page:

1. Select the qty and session.
2. Add the customer information for special event.
3. Click 'Continue' to add to cart before you continue shopping - otherwise you will lose the name and address information.

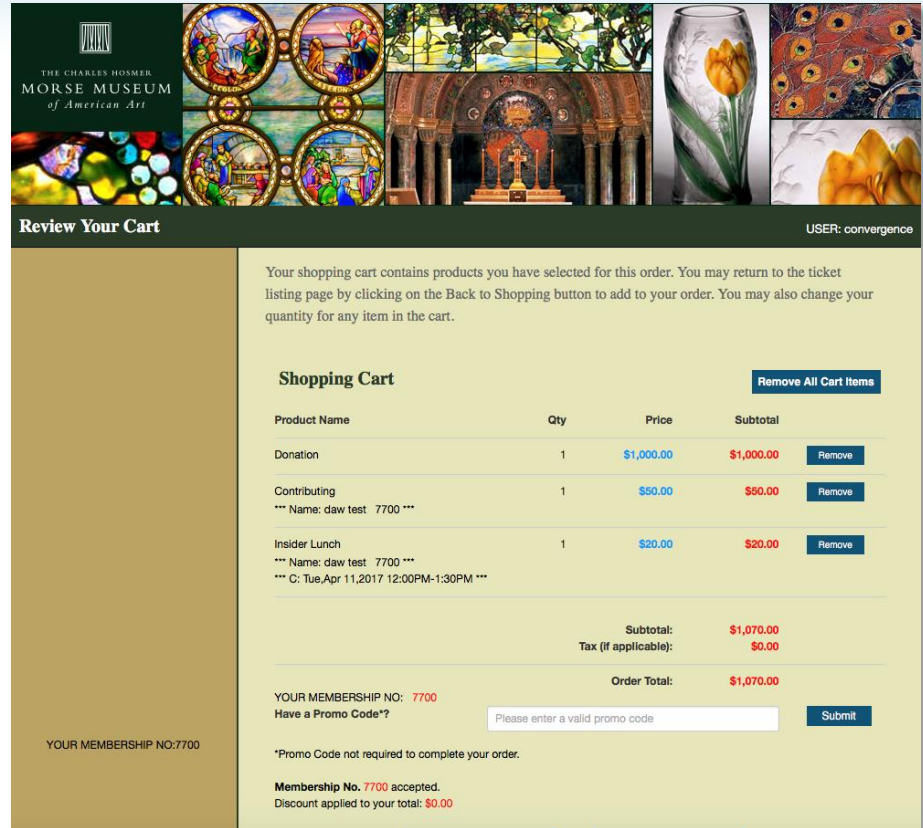


The screenshot shows the 'Insider Lunch' product page. The top section displays the product name 'Insider Lunch', a price of '\$20.00', and a quantity selector set to '2'. An 'Add To Cart' button is visible. A dropdown menu is open, showing four session options: A (Nov 15, 2016), B (Feb 7, 2017), C (Apr 11, 2017), and D (Aug 22, 2017). Below the dropdown are 'Back to Shopping' and 'View Cart' buttons. The bottom section is the 'Registration' form, titled 'Insider Lunch - B'. It contains fields for 'First Name 1*' (Mary), 'Last Name 1*' (Smith), and a dropdown for 'Is this a member or a guest?' (Member). There are also fields for 'First Name 2*' (Larry) and 'Last Name 1*' (Smith), with a dropdown for 'Is this a member or a guest?' (Guest). 'Cancel' and 'Continue' buttons are at the bottom. The footer includes 'Terms and Conditions | Privacy Statement | Customer Service' and the 'TICKETING BY convergence.net' logo.

Shopping Cart Page

Shopping Cart Page:

- View all items that have been added for this order.
- Click the “CHECKOUT” to checkout or select “BACK TO SHOPPING” to add other products to the cart.
- You can also enter a promo code if there is a current offer available.



Review Your Cart USER: convergence

Your shopping cart contains products you have selected for this order. You may return to the ticket listing page by clicking on the Back to Shopping button to add to your order. You may also change your quantity for any item in the cart.

Shopping Cart [Remove All Cart Items](#)

| Product Name | Qty | Price | Subtotal | |
|---|-----|------------|-----------------------------|------------------------|
| Donation | 1 | \$1,000.00 | \$1,000.00 | Remove |
| Contributing *** Name: daw test 7700 *** | 1 | \$50.00 | \$50.00 | Remove |
| Insider Lunch *** Name: daw test 7700 *** *** C: Tue, Apr 11, 2017 12:00PM-1:30PM *** | 1 | \$20.00 | \$20.00 | Remove |
| | | | Subtotal: | \$1,070.00 |
| | | | Tax (if applicable): | \$0.00 |
| | | | Order Total: | \$1,070.00 |

YOUR MEMBERSHIP NO: 7700
Have a Promo Code*? [Submit](#)

*Promo Code not required to complete your order.

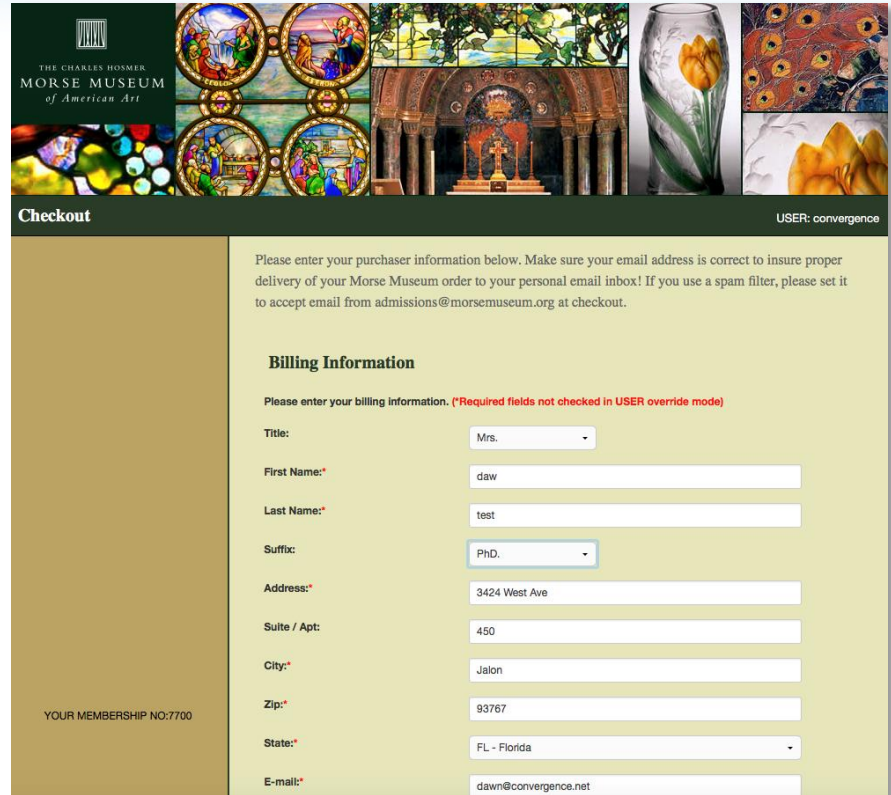
Membership No. 7700 accepted.
Discount applied to your total: **\$0.00**

YOUR MEMBERSHIP NO:7700

Checkout Page

Checkout Page:

1. The customer account info should autofill the checkout page.
2. Add any missing fields that are unique for this transaction.
3. Select “NEXT”



The checkout page features a header with a collage of art images and the text "Checkout" and "USER: convergence". Below the header is a message: "Please enter your purchaser information below. Make sure your email address is correct to insure proper delivery of your Morse Museum order to your personal email inbox! If you use a spam filter, please set it to accept email from admissions@morsemuseum.org at checkout." The main section is titled "Billing Information" and contains a form with the following fields:

| | |
|--------------|----------------------|
| Title: | Mrs. |
| First Name:* | daw |
| Last Name:* | test |
| Suffix: | PhD. |
| Address:* | 3424 West Ave |
| Suite / Apt: | 450 |
| City:* | Jalon |
| Zip:* | 93767 |
| State:* | FL - Florida |
| E-mail:* | dawn@convergence.net |

YOUR MEMBERSHIP NO:7700

Payment Page

Payment Page:

1. The customer account info should autofill the payment page.
2. Add any missing fields that are unique for this transaction.
3. Determine the type of payment the customer wishes to make under "Payment Type".
4. Choices are check, cash, comp, credit card, PO, Pending and many more. This can be scaled back based on your policies.
5. Select "SUBMIT"

| | | | |
|---|---|---------|---------|
| Guest Pass | 1 | \$0.00 | \$0.00 |
| *** Name: daw test *** *** Season 2016: Tuesday, November 01, 2016 9:30AM-4:00PM *** | | | |
| Insider Lunch | 1 | \$20.00 | \$20.00 |
| *** Name: daw test *** *** B: Tuesday, February 07, 2017 12:00PM-1:30PM *** | | | |
| Subtotal: | | | \$20.00 |
| Tax (if applicable): | | | \$0.00 |
| Total: | | | \$20.00 |

Payment Information

Please enter your billing information exactly as it appears on your statement.

Billing Address:*

Suite / Apt:

City:*

State:*

Zip / Postal Code:*

Payment Type:* Visa
 Mastercard
 American Express
 Discover
 Cash
 Check
 Purchase Order
 Complimentary (Comp)
 Use a Credit (do not enter credit card #'s)
 Money Order
 Department Transfer
 Grant
 Pending (Unknown)

Name:*

Card Number:*

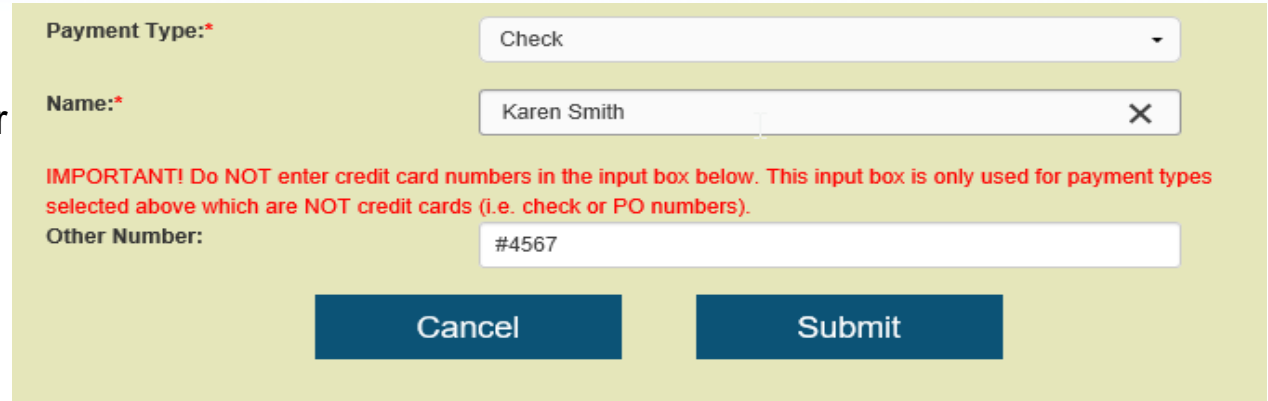
Security Code:

Card Expiration:

IMPORTANT! Do NOT enter credit card numbers selected above which are NOT credit cards

Check Payment

1. For check payments, choose “CHECK” payment type, add your name and enter the check and click “SUBMIT” to complete transaction.
2. *If you do not have the check in hand leave the “Other Number” blank which will allow the payment for the order to pend and flag to collect payment at a later time.



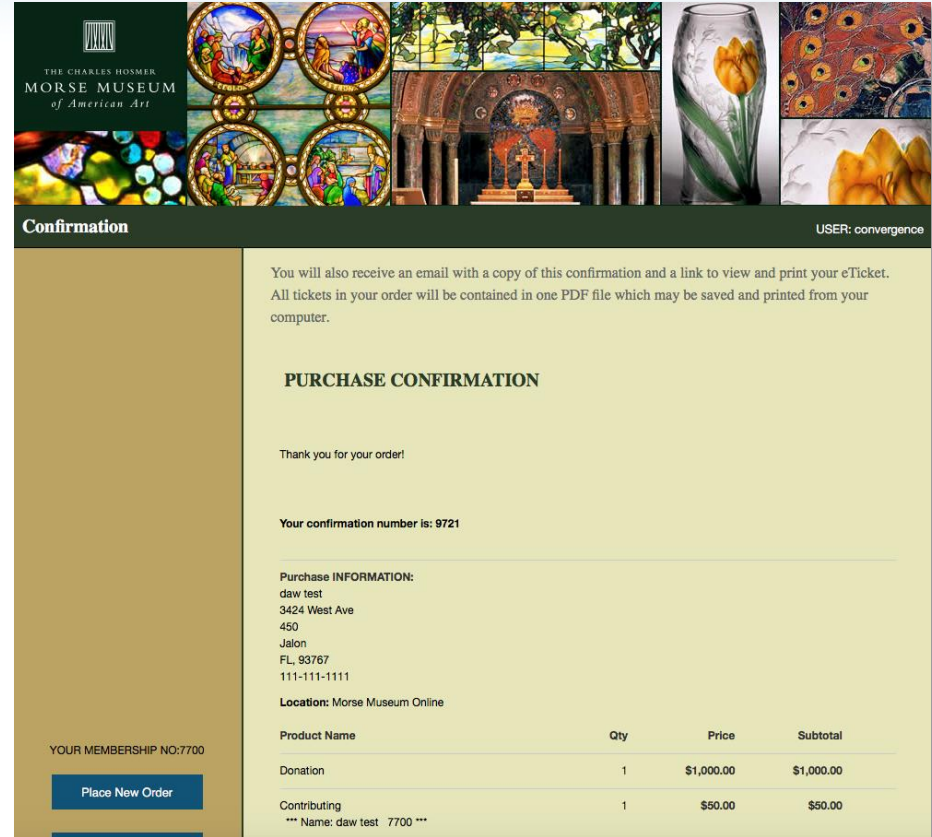
The screenshot shows a payment form with the following fields and buttons:

- Payment Type:*** A dropdown menu with "Check" selected.
- Name:*** A text input field containing "Karen Smith" and a clear button (X).
- IMPORTANT!** A red warning message: "Do NOT enter credit card numbers in the input box below. This input box is only used for payment types selected above which are NOT credit cards (i.e. check or PO numbers)."
- Other Number:** A text input field containing "#4567".
- Buttons:** "Cancel" and "Submit" buttons.

Confirmation Page

Confirmation page:

1. You will receive a confirmation of the order with a confirmation number.
2. The customer will immediately receive a confirmation via email.



Confirmation USER: convergence

You will also receive an email with a copy of this confirmation and a link to view and print your eTicket. All tickets in your order will be contained in one PDF file which may be saved and printed from your computer.

PURCHASE CONFIRMATION

Thank you for your order!

Your confirmation number is: **9721**

Purchase INFORMATION:
daw test
3424 West Ave
450
Jalon
FL, 93767
111-111-1111

Location: Morse Museum Online

| Product Name | Qty | Price | Subtotal |
|---|-----|------------|------------|
| Donation | 1 | \$1,000.00 | \$1,000.00 |
| Contributing *** Name: daw test 7700 *** | 1 | \$50.00 | \$50.00 |

YOUR MEMBERSHIP NO:7700

[Place New Order](#)

Membership Activation

- If the purchase includes a membership select “Card Print” at the end of the payment transaction. Key in the last name, address, last 4 digits of credit card, phone number, member# or order id.
- When you find the correct account, click on the link and it will autofill the member’s info.
- You can add additional unique info to the member processing page.
- Click ‘Start Webcam’ to take the customers photo, click ‘Upload’ and ‘Save’ it and select ‘Print Card’. This may take several seconds. *Morse will not be collecting photos.

Cardholder, Member, and Employee Card Processing

Cardholder First Lookup

Keywords:

purchase# last name, household last name, last 4 digits of phone number, street address, order ID, or member no

Show expired cardholders

| ID | PassNo | Name | Purchase | OrderID |
|-------|--------|------------------|----------|---------|
| 18523 | 7958 | test_daw | 92440016 | 9721 |
| 18525 | 7958 | test_daw | 92440016 | 9721 |
| 18516 | 7951 | Test Test, Test | 92330016 | 9700 |
| 18517 | 7952 | test_daw | 92330016 | 9710 |
| 18518 | 7953 | test_daw | 92330016 | 9719 |
| 18520 | 7955 | test_test | 92330016 | 9714 |
| 18522 | 7957 | test_daw | 92330016 | 9717 |
| 18515 | 7956 | Test_sdf | 92330016 | 9679 |
| 18512 | 7957 | test_daw | 92330016 | 9663 |
| 18514 | 7959 | Test Test, David | 92330016 | 9588 |
| 18588 | 7954 | Test, Michael | 92110016 | 9558 |
| 18469 | 7955 | test_daw | 92110016 | 9559 |
| 18490 | 7956 | test_daw | 92110016 | 9560 |
| 18451 | 7957 | test_daw | 92110016 | 9661 |
| 18455 | 7953 | Test, Kelly | 92110016 | 9664 |
| 18532 | 3003 | Testname, Joe | 92000016 | 0 |
| 11179 | 7909 | Test, Nancy | 81920016 | 9561 |
| 11177 | 7944 | test, nina | 91920016 | 9570 |
| 11136 | 7909 | test_daw | 91920016 | 9523 |
| 11137 | 7902 | Test, Catherine | 91440016 | 9518 |
| 11139 | 7903 | test, caroline | 91440016 | 9519 |
| 10212 | 400085 | test_daw | 91330016 | 9479 |
| 10218 | 400089 | test_daw | 91330016 | 9478 |
| 10218 | 400087 | test_daw | 91330016 | 9479 |
| 10120 | 400088 | test_daw | 91330016 | 9479 |

Refresh Cardholder Import

MANAGEMENT DASHBOARD FOR USER: convergence

Member Processing

Passes in OrderID 0 (and ID 18232)

| ID | PassNo | Name | Level/Type | Purchase |
|-------|--------|---------------|------------|----------|
| 18232 | 3003 | Testname, Joe | Member | 92000016 |

Update Current Cardholder Info

First Name: Testname, Joe

Last Name: Testname, Joe

Address: 9604 55th St

City:

State/Terrace: or Select local city

Zip: 03617

Amount: 30

Phone: 618-688-5800

DOB:

Refunds

- To issue a refund, go to Order Fast Look up in the left hand navigation and search for the customer's last name, order id, or member number.
- Select the correct order. You can identify the correct order by looking at the address.
- Select order id to reach the ORDER DETAIL page.
- At the top of the page you can perform a full refund by selecting "CANCEL ORDER". You will be asked a series of questions in regards to notifying the customer

ORDER DETAILS

Printer Friendly

Order Status
Current Status: **ORDERED**

General Information

Order ID: 9723
Sunday, September 25, 2016 9:57AM (Pacific Time)

Acct ID: *** unassigned ****

, US
tel:
fax:

Venue: Morse Museum Online
Total: \$20.00
Promo Code:
Membership No.: 7701

Payment Information

Ticket Control Panel

eMail Address:

Current Barcode Summary:
1 . 9010100998007058 X

Notes:
i) All scan times are local
ii) Multi-scan format: (max:used)
iii) Click on X to 'void' or 'redeem'

Voided Barcodes:

Order Notes
Add New Note:

Partial Refunds

- Go to the order detail (same as Full refunds)
- For partial refunds, the rule is to always adjust the price of the products first by clicking in the link next to the cart contents to the desired price to match the planned partial refund. So the balance is always showing as \$0.
- Select to “MAKE PAYMENT”

Venue: Morse Museum Online
 Total: \$20.00
 Promo Code:
 Membership No.: 7701

Payment Information Make Payment

Check Received
 Number: #4567 (12:00:00 AM)
 Amount: \$20.00
 Management User: convergence
 Ordered: 9/25/2016 9:57AM (Pacific Time)
 Paid: 9/25/2016 9:57AM (Pacific Time)
 IP Address: 71.236.183.26

| | |
|------------------------|---------|
| Order Amount: | \$20.00 |
| Total Payments: | \$20.00 |
| Balance Due: | \$0.00 |

| Product Name | Qty | Price/Ea | Extended | |
|---|-----|----------|-------------------------------|----------------|
| Individual Add to cart | 1 | \$20.00 | \$20.00 | Remove |
| *** Name: <u>7701</u> *** | | | | |
| | | | SubTotal: | \$20.00 |
| | | | Taxes (if applicable): | \$0.00 |
| | | | Total: | \$20.00 |

Order Notes
 Add New Note:

Add Notes

Partial Refunds

- Select the payment type for the refund
- Add any notes about the refund
- Key in the refund amount.
- Click “SUBMIT”.
- Click “BACK TO ORDER DETAILS”

Make Payments

Enter New Payment Record Information

Payment Type: *

PO/Check No. or Ca Note:

Never put a CREDIT CARD, SOCIAL these numbers are NOT to be stored in this field. It is a security risk to do so, as card your customers' privacy.

Amount:

Submit BACK to ORDER DETAIL

Please select
Credit Card
Cash
Check
Money Order
Department Transfer
Grant
External Credit Card
Refund (decreases payment total)
Apply Credit (this is not 'credit card')
Adjustment (neg. or pos. amountsx)

'Purchase Order' entry is only allowed as the first payment type entered for this order from this management page AND if the initial payment type at time of order is 'PENDING/UNKNOWN' or 'PAY AT THE GATE'. Only one (1) purchase order number per order is allowed.

Current Payment Information

Check Received
Number/Note: #4567 (12:00:00 AM)
Amount: \$20.00
Management User: convergence
Ordered: 9/25/2016 9:57 AM (Pacific Time)
Paid: 9/25/2016 9:57 AM (Pacific Time)
IP Address: 71.236.183.26

Memberships Renewals

- To RENEW a membership for a customer, visit “Household lookup”
- Ask for the customer’s name, email or membership# and click “SEARCH CUSTOMER ACCOUNTS”
- Scroll down and click “SELECT” to pull up their account

Organization Customer Account Processing

Household Fast Lookup

Organization:

First Name:

Last Name:

Phone Number:

Email:

MemberNo:

Account Type:

Imported HH#:

Imported Constituent#:

Keywords: First Name, Last name, phone, email, and/or memberid

Include Customer Household Accounts

Account Search Results(first 1000 records) key:

| | AcctID | Type | Name | Organization | MemberID (MemberNo) | Member Exp | Member Status | Phone | Email | A |
|---------------------------------------|--------|------|------------|--------------|---------------------|------------|---------------|--------------|---------------------------|---|
| <input type="button" value="SELECT"/> | 2023 | O | Test, Dawn | | 11192(7660) | 9/19/2018 | -1 | | dawn77777@convergence.net | 1 |
| <input type="button" value="SELECT"/> | 2023 | O | test, test | | 11192(7660) | 9/19/2018 | -1 | 111-111-1111 | dawn77777@convergence.net | 1 |

Membership Renewals

- Scroll down and you will see “Membership/Season Passes”
- If the membership is eligible for renewal, select the same membership type and/or upgrade the customer to a new level of membership. *Please note you must issue a new member card if the membership level changes
- Once you select your new level and click “Renewal” you will be taken into the store to complete your membership purchase.

Memberships / Season Passes

| ID | No | Name | Product | Tier (Level) | Amount | Expiration Date | Status | OrderID | Order Date |
|-----------------------|----|-----------------------|------------|--------------|---------|-----------------|--------|---------|-----------------------|
| 18251 | 9 | Dorothy C. [REDACTED] | Individual | Individual | \$20.00 | 7/27/2017 | 1 | 0 | 9/20/2018 11:05:03 AM |

Member Notes: Import:

Donations / Adoptions

| ID | No | Name | Product | Tier (Level) | Type | Amount | Expiration | Status | OrderID | Order Date |
|----|----|------|---------|--------------|------|--------|------------|--------|---------|------------|
|----|----|------|---------|--------------|------|--------|------------|--------|---------|------------|

Active

Renewal

Please select product

Family(VID:1)

Individual(VID:1)

Student(VID:1)

Teacher(VID:1)

Benefactor(VID:1)

Contributing(VID:1)

Sustaining(VID:1)

New or Renewed Membership - Letters

- For new members and new member renewals, select a date range of your recent membership sign ups.
- Select “Unprinted cards/letters” and click “SEARCH”
- Then click the link [“Print all with MS-Word Letter Template”](#) and download the letters in the word doc format and print.
- You can also use the keyword search if you would like to print just one membership letter.

MEMBERSHIP REPORT

Select Venue: All

Select Campaign: (Appeal) *** ALL Campaigns ***

Select Media: *** ALL Media ***

Type: Memberships

Start Date: September 24 2016

End Date: September 25 2016

Time Adjust: 0 Number of hours to shift order time (from Midnight Pacific Time)

Payment/Origin: Check

Format: **Wide**

Keyword: e, zip/postal, order ID, or member number

Back Office: Report To MailChimp

Summary (wide format) report for ALL from 9/24/2016 to 9/25/2016

spGetSeasonPass2 @VenueID = null, @campaignID = 0, @mediaID = 0, @dtDate = '9/24/2016', @dtDate2 = '9/25/2016 11:59:59 PM', @searchKeyword = "", @sortField = 'ID', @backOffice = 0

| Mem. ID | Order ID | Name | Member Number | Product | Venue | OrderDate M/D/YYYY |
|---------|----------|------|---------------|------------|-------|--------------------|
| 18526 | 9723 | , | 7701 | Individual | MMWEB | 9/25/2016 |

Membership Renewal Reminder Letters

- Print a batch of renewal member letters that are about to expire, recently expired, 4 weeks expired and/or 5 months expired
- All memberships in that have not been renewed will display as Renewal Letter 1 (4 weeks ahead of expiration), Renewal Letter 2 (1 week after expiration), Renewal Letter 3 (4 weeks after expiration), and Renewal 4 Letter (5 months expired).
- Use the key word search to view specific members
- If letters have been printed they will not display again unless they are not renewed based off the next time line of expiration. If this needs to be reset, please notify your program manager.

MEMBERSHIP REPORT

Select Venue: All

Select Campaign: (Appeal) *** ALL Campaigns ***

Select Media: *** ALL Media ***

Type: Memberships

Start Date: September 23 2016

End Date: September 24 2016

Time Adjust: 0 Number of hours to shift order time (from Midnight Pacific Time)

Payment/Origin: ALL

Format: Renewal Letters

Keyword: last name, zip/postal, order ID, or member number

Back Office Show only back office orders

Search

[Export To MailChimp](#)

| Mem. ID | Mem. No | Primary Name | Product Name | Purchase Date | Expiration Date | Renewal Letter 1 |
|---------|---------|-------------------|--------------|---------------|-----------------|------------------------------|
| 17464 | 4885 | Gary Minor | Family | 12/10/2015 | 11/5/2016 | Print Letter |
| 17778 | 6204 | Noah Kanter | Individual | 12/10/2015 | 11/4/2016 | Print Letter |
| 17803 | 5788 | Valerie Engelmenn | Teacher | 11/3/2015 | 11/3/2016 | Print Letter |
| 17731 | 4885 | Shelley Hatfield | Teacher | 12/1/2015 | 11/3/2016 | Print Letter |
| 17107 | 7013 | Candace Cassidy | Benefactor | 11/4/2015 | 11/3/2016 | Print Letter |
| 17186 | 7014 | Frederick Dryer | Teacher | 11/10/2015 | 11/3/2016 | Print Letter |
| 17289 | 6965 | James Legro | Family | 9/15/2015 | 11/2/2016 | Print Letter |
| 17777 | 6199 | Madelyn Flammia | Teacher | 12/10/2015 | 11/2/2016 | Print Letter |
| 17942 | 5020 | Dee Smith | Family | 8/9/2016 | 11/2/2016 | Print Letter |
| 18368 | 880 | Connie Staudt | Individual | 12/1/2015 | 11/2/2016 | Print Letter |