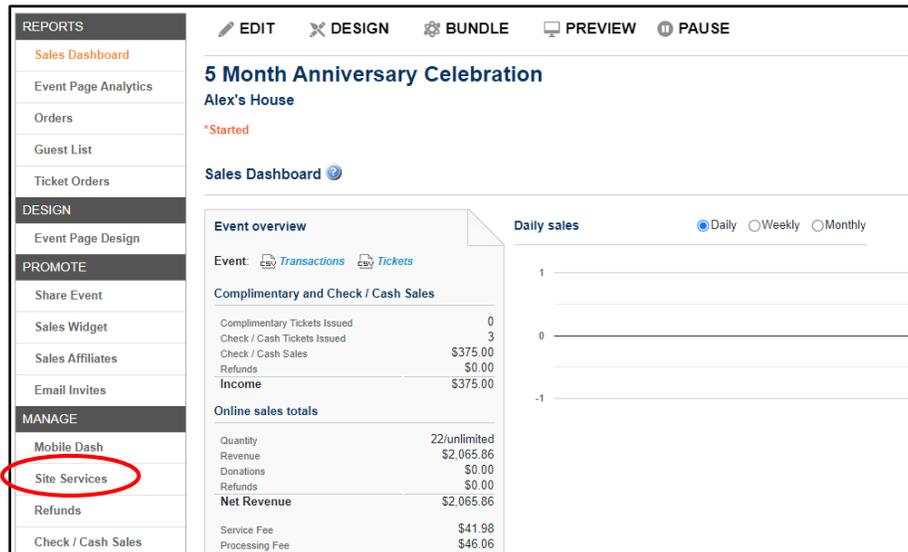


Manage & Edit Orders/Tickets & Issue Refunds

YouTube Tutorial: [HERE](#)

Editing **Guest Information** on a Ticket from the Guest Check In

1. From your *Sales Dashboard*, select *Site Services* from the left-hand menu.

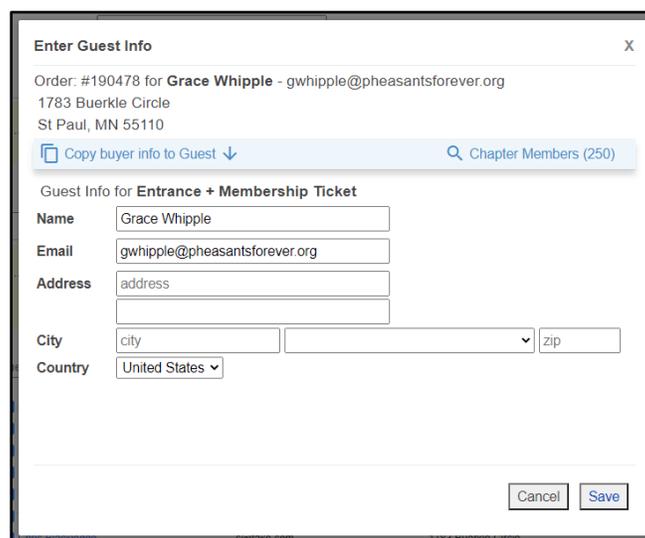


The screenshot shows the 'Sales Dashboard' for a '5 Month Anniversary Celebration' at 'Alex's House'. The left-hand menu has 'Site Services' circled in red. The main content area displays a 'Sales Dashboard' overview with the following data:

Complimentary and Check / Cash Sales	
Complimentary Tickets Issued	0
Check / Cash Tickets Issued	3
Check / Cash Sales	\$375.00
Refunds	\$0.00
Income	\$375.00

Online sales totals	
Quantity	22/unlimited
Revenue	\$2,065.86
Donations	\$0.00
Refunds	\$0.00
Net Revenue	\$2,065.86
Service Fee	\$41.98
Processing Fee	\$46.06

2. On the *Site Services* page, select *Guest Check-In* and enter the Mobile Service PIN when prompted. This will open in a new tab.
3. On the *Guest Check-In* page, you can select an order, and open and edit any ticket and guest information. You can also use the “match” search field to pull up a specific order or ticket.
4. Select a ticket to either copy the buyer information onto it, search within your chapter roster or the full CRM database for their information or type it in yourself. Then hit *Save*.



The 'Enter Guest Info' form shows the following details:

Order: #190478 for **Grace Whipple** - gwhipple@pheasantsforever.org
 1783 Buerkle Circle
 St Paul, MN 55110

Copy buyer info to Guest

Guest Info for **Entrance + Membership Ticket**

Name:

Email:

Address:

City:

Country:

Editing **Guest Information** on a Ticket from the Orders Page

1. From the main *Sales Dashboard*, select *Orders* from the left-hand menu.
2. Here you can search through all your event's orders, both those purchased online and those entered via the check/cash sales page.
3. If you need to make an edit to the guest information on an order, search by last name, email, or order ID and select *Details*.

REPORTS

EDIT DESIGN BUNDLE PREVIEW PAUSE

5 Month Anniversary Celebration
Alex's House

*Started

Orders

Search

Performance: All

Ticket type: Choose One

Buyer (name or email):

Order ID:

Status: All Orders

Search

Orders

If you need to Refund multiple orders, try the [Mobile Dash](#). It's fast, and has a Refund ALL option.

Actions	Order date	Buyer name	Buyer email	Quantity	Revenue	Refunds	Fees	Income
Refund Details	04-20-2021	Grace Whipple	gwhipple@phe...	11	\$1,032.93	\$0.00	\$21.84	\$1,000.00
Refund Details	04-20-2021	Grace Whipple	gwhipple@phe...	1	\$125.00	\$0.00	\$0.00	\$125.00

4. Scroll to the bottom of the page to see the tickets included in that order.
 - a. Here you can resend confirmation emails for the whole order or individual tickets and add or edit guest information on individual tickets.

5. Select *Add guest info to tickets* to again open the guest info page in a new tab.
 - a. Edit any ticket information and choose if

Order #189,599

Quantity

Guest Name	Ticket type	Code	Ticket price	Price	Section	Row / Seat	Status	Action
Whipple, Grace	Bronze Sponsor	14649-18498-5032879949	\$500.00	\$500.00	N/A	Open seating	Acquired	Resend Print
Whipple, Grace	Meal Ticket	14649-18498-6143980050	\$0.00	\$0.00	N/A	Open seating	Acquired	Resend Print
Whipple, Grace	Meal Ticket	14649-18498-7254091161	\$0.00	\$0.00	N/A	Open seating	Acquired	Resend Print
Whipple, Grace	Meal Ticket	14649-18498-8365102272	\$0.00	\$0.00	N/A	Open seating	Acquired	Resend Print
Whipple, Grace	Meal Ticket	14649-18498-9476213383	\$0.00	\$0.00	N/A	Open seating	Acquired	Resend Print
Whipple, Grace	Rooster Bucks	14649-18498-0587324494	\$0.00	\$0.00	N/A	Open seating	Acquired	Resend Print
Whipple, Grace	Rooster Bucks	14649-18498-1698435505	\$0.00	\$0.00	N/A	Open seating	Acquired	Resend Print
Whipple, Grace	Affiliate Membership + Meal Ticket	14649-18498-2709546616	\$0.00	\$0.00	N/A	Open seating	Acquired	Resend Print
Whipple, Grace	Affiliate Membership + Meal Ticket	14649-18498-3810657727	\$0.00	\$0.00	N/A	Open seating	Acquired	Resend Print

1-9 of 9 Per page 20

+ Add guest info to tickets

Resend all

you would like to resend the tickets to that buyer and/or guest with the updated tickets.

- b. *Always **Save changes** before leaving the page.

✦ Affiliate Membership + Meal Ticket
 Sat, May 9, 2020 7:00 PM (CDT)
 Open seating
 Ticket Code: 14649-18498-3810657727

[Copy Previous](#) [Clear Fields](#)

Name:

Email:

Address:

City:

State:

ZIP:

Country:

Phone Number:

Resend tickets to **Buyer** when any changes are saved
 Send tickets to **Guests** with new or changed email addresses

[Save All Changes](#)

When you're done entering Guest Info, you can close this browser tab to pick up where you left off.

Processing a Refund

1. search for their order and select *Refund* directly above *Details*.
2. Select which tickets within the order you would like to refund and select *Refund*.
 - a. The ticket status will then switch to *Refunded* when you look at those order details.
 - b. Your chapter can now handle refunds without needing to go through the National office.
 - c. *If you are looking to refund the entire event – please see the *Mobile Dash* section of this guide.

Refund for order #189598 ✕

Please choose the tickets to be refunded ?

	Guest Name	Ticket type	Price	Code
<input checked="" type="checkbox"/>	Whipple, Grace	Affiliate Membership + Meal Ticket	\$60.00	14649-18498-3810657717

1-1 of 1 Per page 20 Select: All, None Print list

***Refunded amount:** \$60.00

Cancel
Refund

Processing a Refund or Canceling/Exchanging Tickets on the Mobile Dash

*this is the best place to do this if you need to refund a lot, or even the whole event.

- Starting on your *Sales Dashboard*, select *Mobile Dash* from the left-hand menu.

The screenshot shows the Mobile Dash interface for the '5 Month Anniversary Celebration' event. The left-hand menu is visible, with 'Mobile Dash' circled in red. The main content area shows the event overview, including sales statistics and a chart.

Event overview

Event: [Transactions](#) [Tickets](#)

Complimentary and Check / Cash Sales

Complimentary Tickets Issued	0
Check / Cash Tickets Issued	26
Check / Cash Sales	\$2,405.00
Refunds	\$0.00
Income	\$2,405.00

Online sales totals

Quantity	22/unlimited
Revenue	\$2,065.86
Donations	\$0.00
Refunds	\$0.00
Net Revenue	\$2,065.86

Daily sales (Daily selected)

- Select *Orders* from the left-hand menu to see everything that has been purchased or entered so far for your event.
 - Each order will show that it was either an online sale, or a cash/offline sale.

The screenshot shows the Orders page for the '5 Month Anniversary Celebration' event. The left-hand menu is visible, with 'Orders' circled in red. The main content area shows a list of orders with columns for Date, Customer, Payment, and Tickets. A red arrow points to the 'Online' payment method for the first order.

8 Orders - Refresh

Get Orders as .CSV file via email

Get Stripe Charges as .CSV file via email

Refund ALL Orders

	Date	Customer	Payment	Tickets
1 ▶	04/20/21	Grace Whipple (gwhipple@pheasantsforever.org) <i>Accounting code: NATL</i>	Online	11
2 ▶	04/20/21	Grace Whipple (gwhipple@pheasantsforever.org)	Cash/Offline	1
3 ▶	04/20/21	Sophia Williams (2318812@pfqf.org)	Cash/Offline	1
4 ▶	04/20/21	Savanna Williams (2061283@pfqf.org)	Cash/Offline	1
5 ▶	04/26/21	Grace Whipple (gwhipple@pheasantsforever.org) <i>Accounting code: NATL</i>	Online	11
6 ▶	04/26/21	Grace Whipple (gwhipple@pheasantsforever.org)	Cash/Offline	11
7 ▶	04/26/21	Grant Williams (2133956@pfqf.org) <i>They will pay at the door</i>	Cash/Offline	11
8 ▶	04/26/21	Guy Williamson (1696500@pfqf.org)	Cash/Offline	1

- Click on the order to open the order details to view all the tickets sold and the actions you can take.
 - You can issue a full refund by selecting *Full Refund*, or you can choose to refund, cancel, or exchange specific tickets.
 - Selecting *click here for options* will open up the box you see in this screenshot, which explains the three options.
 - Select the action you would like to take, and then it will show you what tickets are eligible for that.

- i. If they purchased a bundle, you can only take action on the full bundle – meaning you cannot cancel or exchange individual tickets within a bundle.
- d. If you scroll down under all the tickets within the order, you can select *Add Tickets to this Order* if you need to account for an additional meal ticket or membership.

The screenshot displays a web interface for managing an order. On the left is a sidebar with navigation icons for Events, Totals, Analytics, Orders, and Guests. The main content area is titled 'Order Details' and includes the following information:

- Order Details:** ID 190492, Date Apr 26, 2021 - 08:48 CDT, Customer Grace Whipple (gwhipple@pheasantsforever.org), Payment STRIPE_ACCOUNT, Reference ch_1lkUnTBojGRaSHwgj2qJKYq, Status CHARGED, Refund Full Refund.
- Comments:** Accounting code: NATL
- Total Amount:** \$1,032.92
- Donation:** \$0.00
- Guest info:** Enter Guest Info

A modal window titled 'Per-Ticket Actions' is open, providing instructions for Refund, Cancel, and Exchange actions. Below the modal, a 'Tickets' section has an 'Action:' dropdown menu with options: Refund, Cancel, and Exchange. A 'Summary w/ bar codes' link is also visible.

This is a close-up of a button labeled '+ Add Tickets to this Order'. Above the button, the text '40677-19202-9470217413 - attendee_print' and 'Fri, May 21, 2021 7:00 PM (CDT)' are visible.