

Point of Sale “App”

YouTube Tutorial: [HERE](#)

1. From your *Sales Dashboard*, select *Site Services* on the left-hand side.

The screenshot shows the 'Sales Dashboard' for an event titled 'Test Banquet' at 'The Place'. The dashboard includes a left-hand navigation menu with categories: REPORTS, DESIGN, PROMOTE, and MANAGE. The 'MANAGE' section is expanded, showing 'Site Services' circled in red. The main content area displays 'Event overview' with a table of financials and 'Daily sales' charts.

Complimentary and Check / Cash Sales	
Complimentary Tickets Issued	0
Check / Cash Tickets Issued	1
Check / Cash Sales	\$50.00
Refunds	\$0.00
Income	\$50.00

Online sales totals	
Quantity	0/unlimited
Revenue	\$0.00
Refunds	\$0.00
Net Revenue	\$0.00

Total fees	
Service Fee	\$0.00
Processing Fee	\$0.00
Discount	\$0.00
Total fees	\$0.00

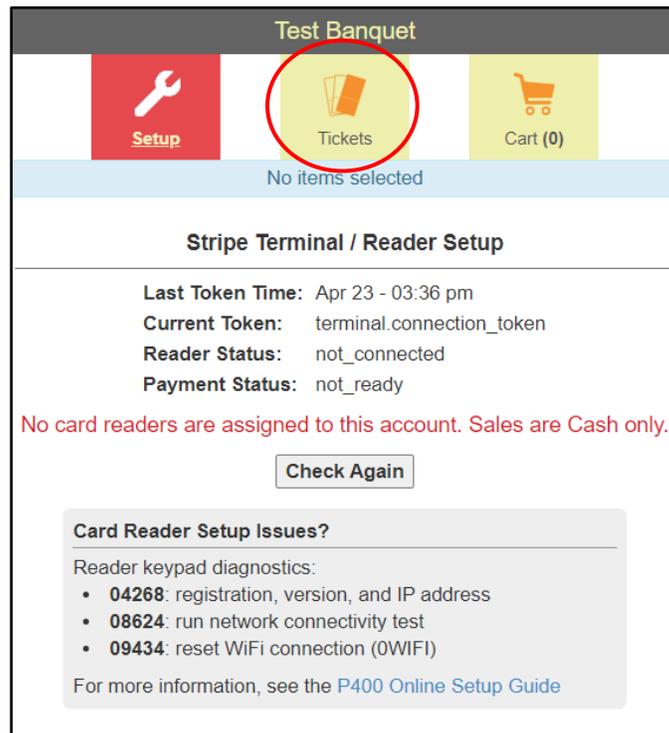
Income	\$0.00
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2. Here you will see a collection of QR codes. Select the blue link to open it on your computer. (If you have volunteers helping at the event who have a phone or tablet, they can use their camera to scan these QR codes to pull up the respective page.)
 - a. This is a great way to allow other chapter volunteers to check people in using their phones as well as sell tickets from their phone – without

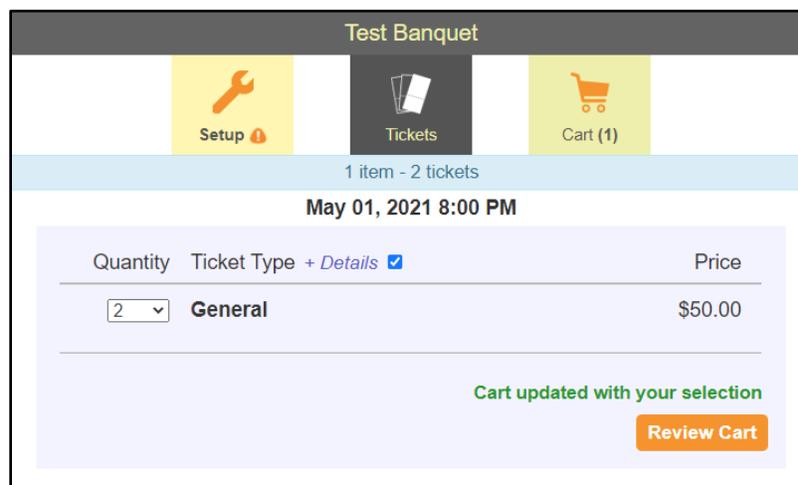
The screenshot shows the 'Site Services' page for the event 'Test Banquet'. It features a large QR code at the top. Below it, the 'Mobile Service PIN' for event 46850 is displayed as 7957, with a red arrow pointing to it. The page includes instructions for using mobile devices and links to various service pages: 'Scan Check-In', 'Guest Check-In', and 'Point-of-Sale' (circled in red). Each link is accompanied by a QR code.

allowing them full access to your event online.

3. *Note the *Mobile Service PIN*, you will need this to authorize your access to this page.
4. Select *Tickets*. Since we do not have Stripe card readers, everything entered through this page will be entered as a cash sale.



5. Select the tickets and respective quantity that is needed and select *Review Cart*.



6. Search CRM

- a. If someone should be in our membership database, they can be looked up via the *Search CRM* feature on this page. This searches directly within our database for that member to help avoid entering their full address information and creating duplicate records.
 - b. You will need at least a partial name in both the last and first name fields. If it is a common name, we recommend adding a state to limit your results.
7. You can then filter by typing more into either name field to narrow down your search.

The screenshot shows a search interface with the following elements:

- Search bar: "Search CRM" with a magnifying glass icon.
- Input fields: "wh" and "gr" (with a "State" dropdown next to it), and a "Search *" button.
- Results: "Found 25 matches in 9.8 seconds".
- Match 1: **White, Greyson** : 2254864 : 2254864@pfqf.org
6202 S 24th St - Saint Joseph, MO 64504-2219
- Match 2: **White, Gracie** : 2149209 : 2149209@pfqf.org
3252 18th St - Charleston, IL 61920-9019
- Match 3: **Whipple, Grant** : 2314829 : gtwhip@gmail.com
22271 Highway 60 - Fairview, OK 73737-4624
- Match 4: **White, Grant** : 2313283 : 2313283@pfqf.org
1411 22nd St - Belleville, KS 66935

8. Select the correct individual and it will pull their information into the fields on the page. Note that their member ID number will also display.
 - a. You can change any field except the member's name while maintaining connection to their member ID. If you edit the member's name, the system will no longer assume that it found the correct ID in the CRM database.
9. Select *Cash Payment* to submit the order.

The screenshot shows a "Buyer Information" form with the following fields and values:

- clear form (button)
- Email: gtwhip@gmail.com
- Name: Grant Whipple
- ID: 2314829 (displayed in a blue box)
- Search CRM (button with magnifying glass icon)
- Address: 22271 Highway 60
- City: Fairview
- State: Oklahoma (dropdown menu)
- Postal Code: 73737-4624
- Country: United States (dropdown menu)
- Phone: (580) 744-0880
- After receiving **cash payment**, issue tickets for order: **Cash Payment** (button)

10. This will automatically open the guest information portion. Especially if the purchase included more than one ticket, this information is necessary.

Tickets	Price	Qty	Amount
General May 01, 2021 8:00 PM: Test Banquet	\$50.00	2	\$100.00
Payment: Cash			
Order Total			\$100.00

Order 190491 Processed
 gtwhip@gmail.com
 Grant Whipple
Please complete the following Guest Information:

General Sat, May 1, 2021 8:00 PM (CDT)
Open seating

[Clear Fields](#)

Name ID:2314829

11. Make any edits and then hit *Save All Changes*. You can then select *Start New Order* to process another purchase.

Order #190491 complete - Guest Info required
×

START NEW ORDER

*If processing a credit card, still enter the information through this page, but run the card through whatever your chapter normally uses to charge credit cards (Converge, Square, etc).