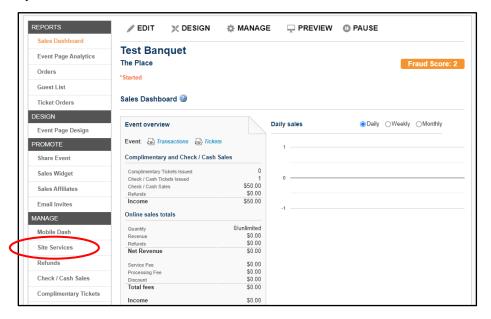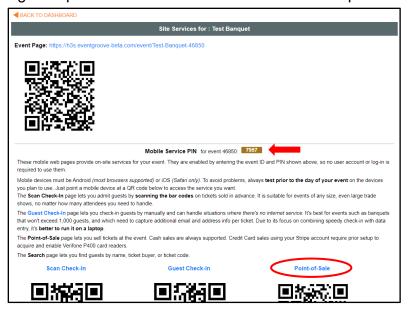# Point of Sale "App"

YouTube Tutorial: [HERE](#)

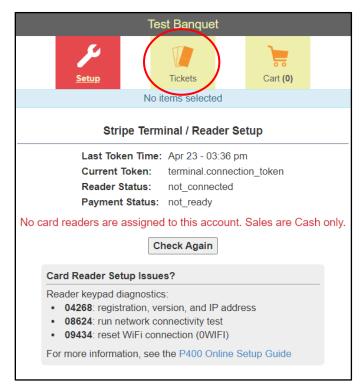1. From your *Sales Dashboard*, select *Site Services* on the left-hand side.

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
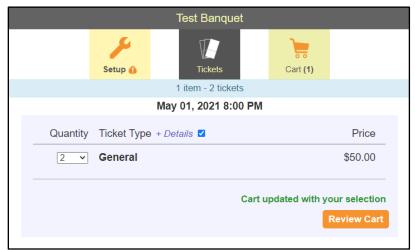
allowing them full access to your event online.

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.
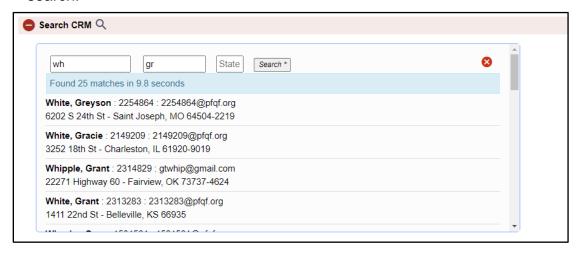

5. Select the tickets and respective quantity that is needed and select *Review Cart*.
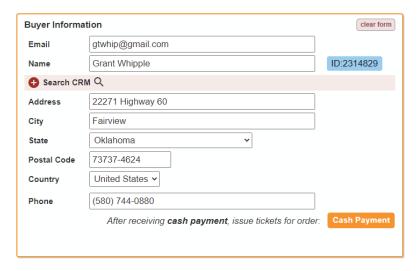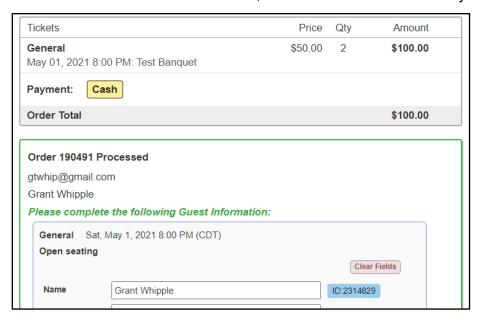
6. Search CRM
   a. If someone should be in our membership database, they can be looked up via the *Search CRM* feature on this page. This searches directly within our database for that member to help avoid entering their full address information and creating duplicate records.
   b. You will need at 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.

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.

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

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

*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).