



SPRING TRAINING BASEBALL SALES 2023 FREQUENTLY ASKED QUESTIONS

How do I log in for the first time?

<https://www.loom.com/share/dcb715ef8a764a7c8cebbaab32ffda98>

How do I get to the main dashboard that shows all my customers?

<https://www.loom.com/share/8e70df229a564190a3650dff2c787147>

How do I view able inventory and place an order for a table?

<https://www.loom.com/share/f2faccf265fa49b4a58058edcd2fbeb0>

I have a potential customer but they don't have an account. How do I create an account for them?

There are two ways to do this:

1. Send the customer a link that is tied to you as the Charro rep:
<https://www.loom.com/share/14bbcf26a04b400eb2a252828dd75af>
2. Enter the customer information yourself, which also ties that customer to you:
<https://www.loom.com/share/0df2d55975bf4c5482d356ee39dd3482>

Once a customer is set up, are all of their sales assigned to my account?

YES!!! Any future sales for that customer are tied to your account. If you come across scenario where it is not working right, please let Kelli know as these are easily solvable issues.

How to I purchase something for my customer?

If a customer says "can you just order tickets for the game on March ___ and send me the invoice", you can do that! You order on behalf of the customer who will get a link to finalize payment.

<https://www.loom.com/share/8f01450405b246bda230c9bc9d4eaf04>

My customer would like to be invoiced instead of using a credit card. What do I do?

Any orders under \$5,000 must be paid with a credit card. If you would like to request an exception, please email Kelli and she will get approval from the baseball chairman.

How do I process custom, discounted, or otherwise special packages?

The new website should only be used to process sales for single game tables, banners, program ads, and game day marketing. You may include multiple items that are available online as part of an order, but if you would like to discuss a customized large package or a discount, please reach out to Derek Flottum, Sales Chair.

How do I review all of the sales that I have made so far?

Go to your Dashboard and look at your earnings. Sales are not recorded until payment is made, so please review this link for more information:

<https://www.loom.com/share/2f498de53eb948eab3b136bd131de68c>

My customer is taking forever to make their payment. Do they still have their tickets?

We will be reviewing orders that are sitting in carts very closely. We will reach out if it looks like it's taking too long, however we encourage customers to make their payment within 24 hours of the order going in the cart. After that, the order may be forfeited and the items placed back in available inventory for others to purchase. The order is not finalized for that customer until payment is made!!!

How do I request a refund, or what I ordered the wrong item?

Reach out to Kelli in the Charro office and she can help you correct the order and/or issue a refund.

I created a customer but would like to delete them. What do I do?

Reach out to Kelli, Bob or Derek and one of them can help you correct the order and/or issue a refund.

How do I split the sales credit with another Charro?

This is one of the limitations of this system. If you have a split sale, it can only be assigned to one Charro. However, we will do manual split at the end of the season to account for this. If you want to split a sale, enter the sale for one Charro and send Kelli and Derek Flottum (derek.flottum@opus-group.com) a note indicating which sale should be split and which Charro it should be split with. Please reference the order # as Kelli will be keeping records of this.

How do I order a season table or create a large group order of 25+ people for one game?

Given the complexities with this, we are going to have the office enter these sales. If you have one of these sales, please email Kelli and copy Derek Flottum.

I ordered something for myself as a Charro, but I do not see it on my dashboard? How do I fix this?

This is a unique aspect to this site that requires administrative work. If you buy something for yourself using the email address associated with your Charro agent account, please let Kelli know and she will add your name to the order so you will get sales credit.