

How to use the Follow up options/reservations screen

In the Organization context, Sales Management module, the follow up options/reservations allows you to send a reminder to contacts whose options and reservations have been expired and possibly release them in bulk.

Filter the affected orders

Several filters are available in order to show only the desired orders.

The mandatory filters are the following:

- Choice of the type of order: option or reservation
- Selection of the confirmation deadline: all orders for which the option or reservation expires on or before this date are displayed. For example, if we want to send a reminder to all the contacts whose reservation will expire in 5 days, we select the date D+5. On the other hand, if we want to release all the reservations that have expired in 7 days, we select the date D-7.
- Selection of season and product family

Additional filters are available, notably by product, contingent and price.

Once you have selected the filters, click on Search to find the corresponding orders.

The screenshot shows the 'Release options or reservations' interface. It includes a sidebar with navigation links like 'Cash Desks', 'Bulk Printing', and 'Banking transactions'. The main area contains several filter sections: 'Booking' (dropdown), 'Deadline for confirmation' (date picker), 'Contact' (search), 'Sales Channel', 'Season' (dropdown), 'Product Family' (dropdown), 'Family' (dropdown), 'Activity' (dropdown), 'Event' (dropdown), 'Product Type' (dropdown), 'Contact types' (dropdown), 'Performance' (dropdown), and 'Contingent'. There are also sections for 'Quota choices', 'Tariff choices', and 'Seat categories'. At the bottom, there are 'SEARCH' and 'CLEAR' buttons. A red arrow points to the 'SEARCH' button.

Send a reminder to the contacts whose reservation is about to expire

From the displayed order lines, select the ones for which you want to send a reminder, using the checkboxes on the side.

The checkbox on the column header allows you to select all the displayed rows in one click.

Please note that the search results are limited to the first 100 lines. Refine the filters in case the system announces that not all elements could be displayed.

The screenshot shows a table with the following columns: DEADLINE, CONTACT PURCHASE, NO ORDER, NO FILE, SALES CHANNEL, PRODUCT, CATEGORY, PERFORMANCE, AUDIENCE CATEGORY, TARIFF, CONTINGENT, and QUANTITY. The first row of data shows a deadline of 17/05/2020, contact purchase of Kenwright, Bill / Everton Football Club Co Ltd (5210822), no order of 9 767 284, no file of 8 028 236, sales channel of Back Office (Hospitality), product of Premier League Home Games 2020/21, category of Directors Box, performance of 19/09/2020 12:30 pm, audience category of Subscribed contact, tariff of Complimentary, contingent of Hospitality - Packages, and quantity of 9. A red arrow points to the 'SEND REMINDER' button above the table.

The reminder email is a default document sent. It can be customized like other documents via the Institution > Initialization > Document Types screen. This is the document entitled: Options/Reservations Reminder.

Release options/reservations that have been expired

Among the displayed commands, select the ones you do NOT want to release and mark them to "Do not release".

Please note that by default all commands are in the "Release" state. This means that all these options/reservations will be released if you click on the buttons "Launch the release" or "Launch the release for all".

Once the state of the order lines is correct, click on "Release" to cancel all the orders in the "Release" state.

The button "Launch release for all", allows releasing all the orders that satisfy the search filters, including those that are not displayed in case the number of results exceeds 100 lines.

<div><div>▶ SEND REMINDER</div><div>▶ RELEASE</div><div>▶ DO NOT RELEASE</div><div>▶ LAUNCH THE RELEASE</div><div>▶ LAUNCH THE RELEASE FOR ALL</div><div>▶ BLOCK</div><div>▶ UNBLOCK</div></div>												
<input checked="" type="checkbox"/>	DEADLINE	CONTACT PURCHASE	NO ORDER	NO FILE	SALES CHANNEL	PRODUCT	CATEGORY	PERFORMANCE	AUDIENCE CATEGORY	TARIFF	CONTINGENT	QUANTITY
<input checked="" type="checkbox"/>	17/05/2020	Kenwright Bill Everton Football Club Co Ltd /5210822	9 767 284	8 029 236	Back Office (Hospitality)	Premier League Home Games 2020/21	Directors Box	19/09/2020 12:30 pm	Subscribed contact	Complimentary	Hospitality - Packages	9

Releasing/Not releasing vs. Blocking/Unblocking

The "Release" and "Do Not Release" buttons are used to temporarily change the state of one of the result rows in order to mark certain commands for the release actions that will follow. See above. These are short-term states, which are skipped as soon as a new search is started. By default, all orders are to be released.

The Block/Unblock buttons are used to lock an option or reservation to prevent an operator from releasing it. Locked orders cannot be released until they are explicitly unlocked by an operator. This lock remains active on the order until it has been unblocked. From the details of a file, it is also possible to Block/ Unblock a reservation.