



New Functionality in the Party Module

Adding an Order for a Customer Associated with Another Consultant

There is a new function in the party module which:

- Allows the Consultant to add an order for a Customer who is associated with another Consultant right from inside an active party.
- Only associates that one order without showing which Consultant the Customer belongs to.
- Allows the ordering Consultant to no longer be “blocked” when trying to enter an email address.

Here's How

Inside an active party, on the Guest tab:

- 1) Select **Lookup Existing Guest** to add the guest to the Gathering.

purehaven

Home | Guests | Bookings | Orders | Close Party

New Guest

Select one of your Customers to add as a Guest: (102765)

Select a previous event's Guest to add to this Party: (110497)

Click here to create a new Customer to be added as a Guest.

Click here to lookup an existing Pure Haven Customer not in your group:

Cassidy's Test Party! (Cassidy Funk) - Guests

	Guest	Booking	Date Invited	RSVP	Attended	Materials Provided
edit	New Order	Funk, Cassidy (726797)	Yes	No RSVP	No	No

Guests shown: 1


- 2) Enter the email address associated with the Customer you would like to add to the Gathering.

Lookup Existing Customer

This interface will allow you to lookup an existing Pure Haven Customer that is not in your immediate Customer group.

Email Address

Additional Security (required)

I'm not a robot 

[Click to reset if ReCaptcha spins for more than 5 seconds](#)

- 3) If the email address exists in the system, the Customer name and ID number will populate below the email address bar.
- 4) Select **Use This Customer** for the Customer placing the order and answer security protocols.

Lookup Existing Customer


This interface will allow you to lookup an existing Pure Haven Customer that is not in your immediate Customer group.

Results for "molly.connolly@purehaven.com"

Molly Connolly (671603)

Additional Security (required)

I'm not a robot


reCAPTCHA
Privacy - Terms

[Click to reset if ReCaptcha spins for more than 5 seconds](#)

- 5) Voila! Enter the order as usual.

Questions? Please email consultantservices@purehaven.com for assistance.