

# Spektrix + SalesVu Integration Setup

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## Adding SalesVu as an API User

To create an API user, you'll need to have the *Settings Administrator* user role on your Spektrix account. For more information on user roles in Spektrix, check out [this article on Adding and Editing Users](#).

Navigate to *Settings Interface > Users > API Accounts*. Here you'll find a list of all current accounts that have secure API access. Click one of the **New API Account** buttons to start the process of creating a new API user:



This will open the New API Account creator pop-up:

## New API Account

Username

Email address

Phone number

Telephone numbers should use the international telephone format, starting with a + character.

You'll need to provide three pieces of information here to set up an API user: Username (can be entered as **SalesVu**), Email address, and Phone number. Enter an email address & phone number that is easily accessible by your organization.

**NOTE:** The phone numbers needs to be a mobile/cell phone number and should be added using the international country code and the mobile/cell phone number (e.g. 07894 123 456 must be entered as +447894123456/ (123) 456-7890 must be entered as +11234567890)

. Once you've entered these details, click **Create API Account** and the API user will be created. The system will send a text message with an authentication code to the user's phone and an email with a link to a secure page to their email address:

**Retrieve api access details for API Testing**

Please enter the authentication code you have recieved via text message

Once the user inputs the authentication code they received via text into this page, they'll see the username you gave them and their API Key. Make sure to make note of this key as you will need to connect your SalesVu system to Spektrix.

## Setting up a Custom Payment Types

For SalesVu to write information back into Spektrix, you will need to create a custom payment type. To add a custom payment type, head to the *Admin Interface* and go to *Other > Custom Payments*. You'll see all the currently active Custom Payment Types listed here:

Events Fixed Series Pricing Seating Customers <b>Other</b> Document designs						
Funds Merchandise Memberships Offers Promotion Codes Priority Booking <b>Custom Payments</b> Soft Credit Types						
Custom payments						View inactive? <input type="checkbox"/>
<b>Cheque payment</b> <span style="float: right;">🔒 Authorisation required? ✎</span>						
Counter	Phone					
Commission:	£0.00	£0.00	<input type="checkbox"/> Is refund?	<input checked="" type="checkbox"/> Can be cancelled?		
<b>Cheque refund</b> <span style="float: right;">🔒 Authorisation required? ✎</span>						
Counter	Phone					
Commission:	£0.00	£0.00	<input checked="" type="checkbox"/> Is refund?	<input checked="" type="checkbox"/> Can be cancelled?		
<b>Internal Charge payment</b> <span style="float: right;">🔒 Authorisation required? ✎</span>						
Counter	Phone					
Commission:	£0.00	£0.00	<input type="checkbox"/> Is refund?	<input checked="" type="checkbox"/> Can be cancelled?		
<b>Internal Charge refund</b> <span style="float: right;">🔒 Authorisation required? ✎</span>						
Counter	Phone					
Commission:	£0.00	£0.00	<input checked="" type="checkbox"/> Is refund?	<input checked="" type="checkbox"/> Can be cancelled?		
<b>Invoice payment</b> <span style="float: right;">🔒 Authorisation required? ✎</span>						
Counter	Phone					
Commission:	£0.00	£0.00	<input type="checkbox"/> Is refund?	<input type="checkbox"/> Can be cancelled?		
<b>Invoice refund</b> <span style="float: right;">🔒 Authorisation required? ✎</span>						
Counter	Phone					
Commission:	£0.00	£0.00	<input checked="" type="checkbox"/> Is refund?	<input checked="" type="checkbox"/> Can be cancelled?		
						<input type="button" value="Add"/>

To add a new Custom Payment Type just click the **Add** button at the bottom of the list. You'll see the following popup, which contains two sections. The first **Basic Details** section looks like this:

### Add Custom Payment

1 Basic Details

2 Attribute Templates

**Name:**

**Is refund?:**

Counter Phone Tax code

**Commission:** £  £

**Can be cancelled?:**

**Active?:**

**Authorisation required?:**

**Name:** SalesVu

**Is refund?:** tick this box if you want to create a **refund** type rather than a payment. This can be left unchecked.

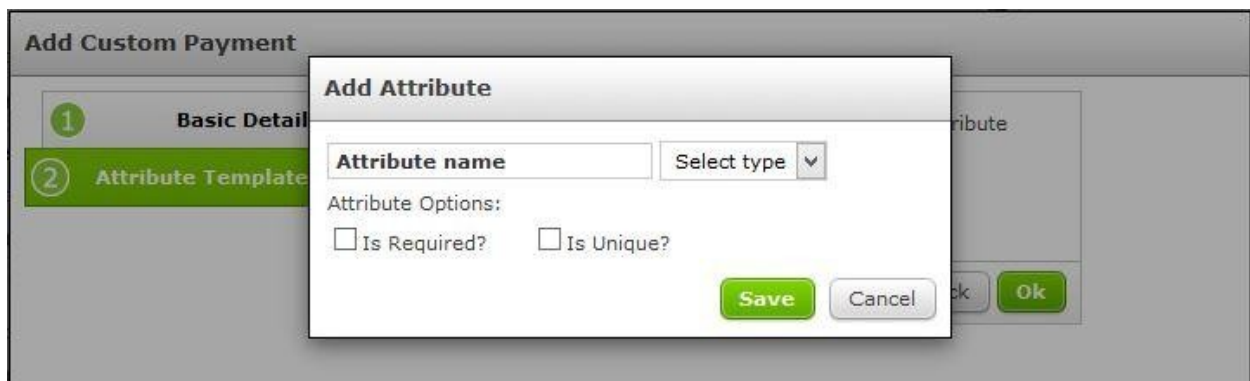
**Commission:** These options you can leave as 0.00. You have to set a **Tax Code** to be able to make your payment type, in the same way as when you create an Event

**Can be canceled?:** tick this box if you want your sales staff to be able to cancel the payment type in the basket. We would recommend leaving this ticked so that if it is accidentally applied to the basket in the *Sales Interface* it can be canceled.

**Active?:** this defaults to being ticked, meaning that the Custom Payment Type can be used.

**Authorization required?:** by default this is set to unlocked, meaning any sales user can use this Custom Payment Type. We recommend leaving this unlocked so SalesVu will have access to this payment type.

The second section is called **Attribute Templates** - this is optional and allows you to add Attributes to the Custom Payment Type. These are separate to the Attributes you may have already created in the *Settings Interface* and are specific to each Custom Payment Type.

The image shows a screenshot of a software interface. In the background, there is a window titled "Add Custom Payment" with a sidebar containing two items: "1 Basic Detail" and "2 Attribute Template", where "2 Attribute Template" is highlighted in green. Overlaid on this is a smaller dialog box titled "Add Attribute". The dialog box contains a text input field labeled "Attribute name", a dropdown menu labeled "Select type", and a section titled "Attribute Options:" with two checkboxes: "Is Required?" and "Is Unique?". At the bottom right of the dialog box are two buttons: "Save" (highlighted in green) and "Cancel".

You can create the same types of Attribute as you would in the *Settings Interface* - [see this article for more information on Attributes.](#)

## Creating a Merchandise Item

A merchandise item needs to be created in Spektrix for SalesVu to be able to write transactions back to the customer record. We recommend basing this item on location (e.g Concession stand, Bar, Restaurant) as opposed to individual items, to save having to recreate every item in SalesVu and Spektrix. The merchandise reference field will allow SalesVu to write the individual item name to the order in Spektrix. The 'Reference' field can be used as search criteria in segments for customer lists and auto tags.

Will Call Delivery			
		2 Mrch	\$17.00
<input type="checkbox"/> Merchandise		Price \$	Total \$
Bar Sales Reference: Tilia		8.50!	8.50
Bar Sales Reference: High Note		8.50!	8.50

Print ▼ Drag+CTRL = Multiselect Print all unprinted

Example of how sales will appear within an order in the Sales Interface.

## How to Create Merchandise Items in Spektrix

To add a new item of merchandise ready for sale you need to go to **Admin>Other>Merchandise**. To add a new item, click "Add"

First you need to provide the basic details of the merchandise item - fields marked in red here are required, and your item cannot be created without them.

**Name:**

**Description:**

**Image:**  No file chosen  
Files larger than 4MB cannot be uploaded.

**Cost Price:** \$

**Sale Price:** \$

**Postage And Packing?:** \$

**Track Stock Quantity?:**

**Tax Code:**  ▼

**Ticket Design:**  ▼

**Active?:**

**Confirmation Text:**

**Size:**

**Color:**

You will need to fill out the following fields with the following values:

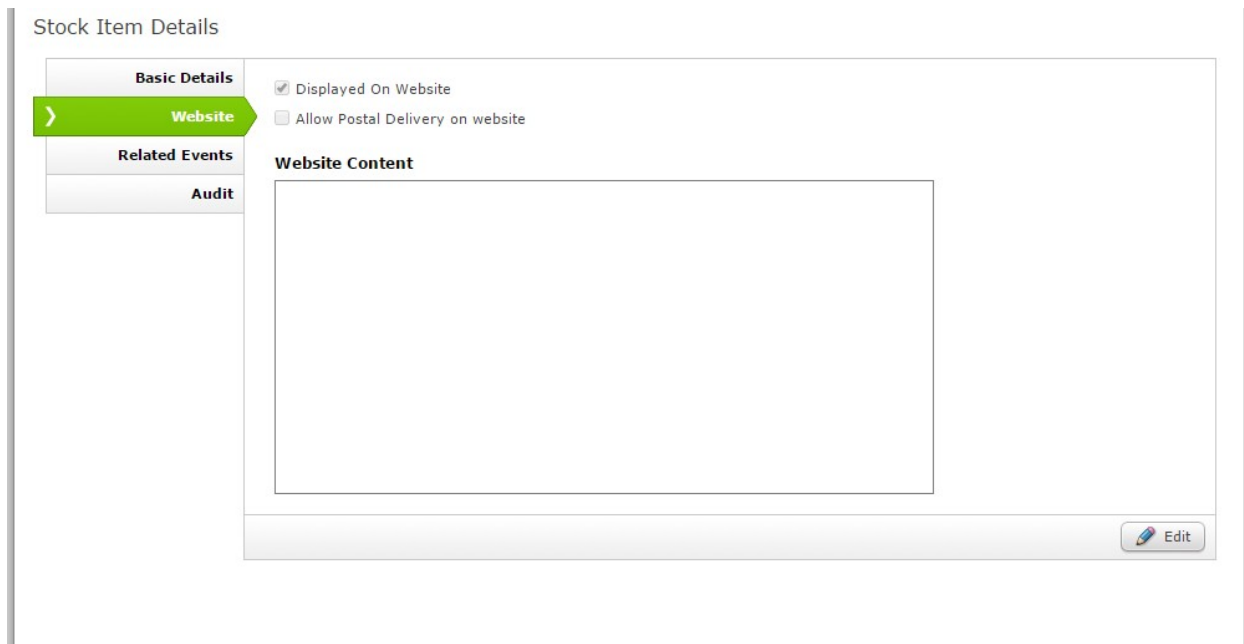
**Cost Price:** 0.00  
**Sale Price:** 0.00  
**Postage And Packing:** 0.00  
**Tax Code:** N/A  
**Active:** Ticked

Once you click "Add", the merchandise item is ready for sale.

## Making Merchandise Available Online

In the Website tab of the merchandise item, you can choose whether you want the item to display and be available online. Here you will want to tick off the *Displayed on Website* box so that SalesVu can access your merchandise item over the API.

The *Website Content* box can remain blank.



The screenshot shows the 'Stock Item Details' form with the 'Website' tab selected. The 'Basic Details' section contains two checkboxes: 'Displayed On Website' (checked) and 'Allow Postal Delivery on website' (unchecked). Below this is the 'Website Content' section, which is a large empty text area. An 'Edit' button is located at the bottom right of the form.

**NOTE:** If your website utilizes the Spektrix Merchandise Iframe to display items for sale online this item may appear on your website. There are two ways in which you can approach this.

1) Your web developer can use a merchandise attribute to filter out merchandise items that should not be displayed on your website

To do so, create a checkbox attribute named to the effect of 'ForIntegrations' and check this box within your SalesVu merchandise item build. This attribute will allow you to filter the Merchandise Iframe to only display items that are listed as 'Displayed on Website' that do NOT have this box checked.

**ForIntegrations:**

Your web developer, or someone in your organization who has access to your website management system, can filter the Merchandise Iframe following the instructions listed on our [Integrate Portal](#).

You will essentially need to add the filter **?Attribute\_ForIntegrations=0** to the URI parameter.

2) You can set the item to be 'Displayed on Website' temporarily. Once SalesVu has obtained the merchandise ID via the Spektrix API and mapped this to their platform, the 'Displayed on Website' box can then be unchecked.

If you follow the above steps you should have everything set up and ready to go with SalesVu. If you have any further questions, please don't hesitate to get in touch with the Spektrix Support team.