

**Theater Manager's
Selling a Season Subscription (via the Order Window)
Quick Reference Guide**



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Released in conjunction with the screen show

We are striving to create documentation that you will find useful in completing your tasks with Theatre Manager.

This is a DRAFT document based on Theatre Manager 8.16 If you have any questions pertaining to the document, find any errors or omissions or any suggestions to enhance your user experience, please email the details to:

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Season Subscriptions

Introduction to Season Subscriptions

The Season Subscription module is used to set up season packages patron's can subscribe to. When subscribed to a season package, the patron can pick their favorite seats for each package. These seats remain the same for each performance. Each performance also happens in the same time frame.

For example, a patron can subscribe to the first Friday performance of each event, or the second Sunday matinee for each event.

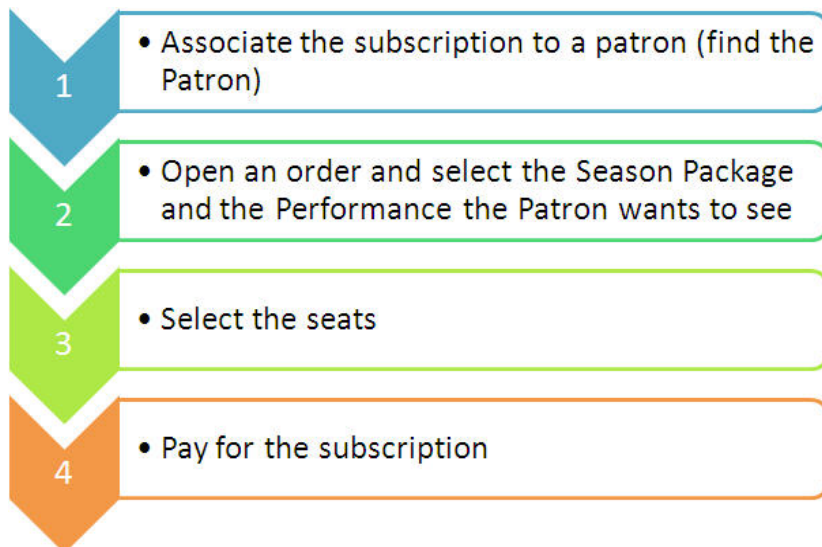
Theatre Manager's Season Subscription module allows an organization to:

- Maintain patron's favorite seats.
- Maintain various packages of season subscription configurations.
- Automate the sending and printing of subscription renewal notices.
- Automate the Booking procedure for Single or Multiple Subscriptions.

Using the season subscription module an organization:

- Knows no two patrons can have the same favorite seat.
- An automated process is used to establish a patron's favorite seats.
- Can purge old, unused, or non-renewed patron subscription history and favorite seats.
- Can swiftly book tickets for season subscriptions.
- Release tickets for non-renewed season subscriptions.
- Release unpaid tickets for a specific performance of a play.

Season Subscription sales consist of four parts. These are:






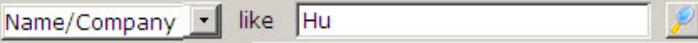

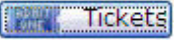



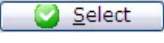
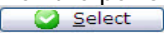

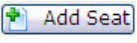


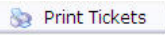
This document focuses on selling a season subscription via the Order Window. For further information on the com the Season Subscription module you can review the following:

- [Setting Up Season Packages](#)
- [Editing a Season Package](#)
- [Printing Renewal Notices](#)
- [Season Subscription Packages](#)
- [Subscription Windows](#)

And



- [Selling Season Subscriptions](#)


Selling Season Subscriptions Via the Order Window--Single Sheet

Step	Function	More Information
	<p>1. Click the Patron  button in the tool bar. The Contact List window opens.</p> <p>2. Enter your search criteria and click the Search  button.</p> <p> Name/Company like Hu</p> <p>The Contact List window displays the patrons matching your entry.</p>	<p>For more information on finding Patrons see the on line help: Finding a Patron Using the Contact List Window.</p>
	<p>You can:</p>	<p>Or:</p>
	<p>3. Highlight the patron</p> <p>4. Click the Buy Tickets  button in contact list ribbon bar.</p>	<p>4. Double click the selected patron to pen the patron window</p> <p>5. Click the Tickets  button at the bottom of the Patron Window.</p>
	<p>The Order window opens.</p> <p>5. Click the Season  button. The Season Subscription display opens.</p> <p>6. Click the New  button. The Select a Season Package window opens.</p> <p>7. Select the package for the patron.</p> <p>8. Click the Select  button. The Performance Selection window opens.</p> <p>9. Pick the performance night for the patron, and click the Select  button.</p>	<p>For more information see the on liner help: Subscribing a Patron to a Season Package via the Order Window</p>
	<p>10. The Subscription window opens Choose the appropriate Seat and Price Code.</p> <p>11. Click the Add Seat  button. The seat(s) picked appear in the Favorite Seats tab.</p> <p>12. Click the Book  button.</p> <p>13. Theatre Manager books the tickets to each performance in the Season Package. Once all seats have been booked, the user is moved to the Payment section of the Order window. The user can continue to add other tickets, passes, or memberships, or complete the payment process. As seats are selected they appear in the seats portion of the window and a running total of the Order appears in the lower left of the window.</p>	
	<p>14. Enter the payment information.</p> <p>15. Click the Print Tickets  button. Clicking this button accepts the payment, prints the tickets and returns you to the Contact List window.</p>	<p>For more information on this step, see: Creating a Payment</p>

Step 1—Find a Patron

To find the Patron:

1. Click the Patron  button in the tool bar. The Contact List window opens.
2. Enter your search criteria and click the Search  button.


like 

The Contact List window displays the patrons matching your entry. You can now select the patron you can require.


- For more information, see the online help section, [Finding a Patron Using the Contact List Window](#).

To open an order and select the event:

You can:

3. Highlight the patron
4. Click the **Buy Tickets**  button in contact list ribbon bar.

Or:

3. Double click the selected patron to open the patron window
4. Click the **Tickets**  button at the bottom of the Patron Window.

Step 2—Select the Season Package and Performance

The **Order** window opens.

- Click the **Season** button. The Season Subscription display opens.



- Click the **New** button. The Select a Season Package window opens.

- Select the package for the patron.

- Click the **Select** button. The Performance Selection window opens.

Pick the performance night for the patron, and click the Select button.

Step 3—Select the Seats

To add tickets to the selected order:

- Click the **Seat Selection** tab.

- The Seat Selection window opens. The performance you have chosen appears in the Event portion of the window.
- If required, choose the Promo Code—in this example, all of the seats are adult.
- In the Theatre graphic, pick the seats the patron wants. As seats are selected they appear in the seats portion of the window and a running total of the Order appears in the lower left of the window.

Step 4—Patron Makes a Payment For The Subscription

To create the payment:

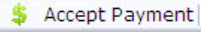
- Click the **Payments** button in the Order window. The Payment Details window opens.

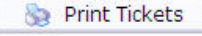
The screenshot shows a software interface for entering payment details. It includes several sections: 'Order Information' with fields for PO Reference, Sold By, Why did Patron buy?, and Postal Code; 'Payment Information' with a dropdown for Payment Method (where 'Cash' is selected) and a table for Payment Amount, Cash Tended, Foreign Tended, and Change; 'Ticket Handling' and 'Ticket Printing' options; and 'Order Comments' with a text area. A 'Payment Information' pop-up window is overlaid on the main form, showing the selected 'Cash' method and a payment amount of \$165.00. Red boxes and arrows highlight key elements: a double-headed arrow (11) between 'Send Invoice' and 'Ticket Handling'; a box (12) around the 'Payment Method' dropdown; a box (13) around the 'Payment Information' pop-up; and a box (14) around the 'Accept Payment' and 'Print Tickets' buttons at the bottom right.

Payment Method	Payment Amount
Cash	\$165.00
Cash Tended	\$165.00
Foreign Tended	\$0.00
Change	\$0.00

10. Enter the appropriate information in the Details Order Information, Ticket Handling, Ticket Printing and Order Comments sections.

See [Payment Details Tab Fields](#) for descriptions of the fields in the Payment Details tab.

11. Choose the Payment Method from the drop down list.
12. Once you have selected the payment method, verify the price and enter the payment details.
See [Additional Information on Payments](#) for information on the different payment fields.
13. Click the **Accept Payment**  button, this accepts the entered payments. If the order is paid in full the tickets are printed and the order window closes.
Alternatively,

You can click the **Print Tickets**  button to print special information on the ticket For example, birthday wishes, complimentary tickets from, etc.

Additional Information on Payments

The Common Payment Method Options and Entering the Payments

Payment Method	Cash
Payment Amount	American Express
Cash Tendered	Cash
Foreign Tendered	Cheque
Change	Coupon
	Diners Club
	Gift In Kind
	MasterCard
	On Account
	Other
	Pass
	Visa

Theatre Manager allows you to define a number of different payment types in the Payment Tabs Code Table. Following are examples of how the most common work.

Cash

The patron wishes to pay for their tickets with cash.

Payment Information	
Payment Method	Cash
Payment Amount	\$68.40
Cash Tendered	68.40
Foreign Tendered	\$0.00
Change	\$0.00

When the Payment window opens, and you choose Cash, the Cash Tendered field is automatically populated with the total payment amount.

Verify the Payment Amount.

Partial Payment

Payment Method	Cash
Payment Amount	34.20
Cash Tendered	\$68.40
Foreign Tendered	\$0.00
Change	\$0.00

If this is a partial payment, change the payment amount.

Click the tab key on the keyboard.

Payment Amount	\$34.20
Cash Tendered	\$34.20
Foreign Tendered	\$0.00
Change	\$0.00

The Payment Amount now displays the new amount due.

Payment Method	Cash
Payment Amount	\$34.20
Cash Tendered	\$50.00
Foreign Tendered	\$0.00
Change	\$15.80

Enter the cash tendered from the patron and click the tab key.

The amount of change due to the patron is calculated and displayed.

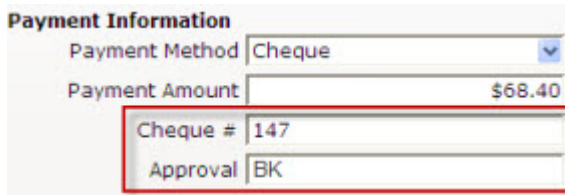
Payment Method	Cash
Payment Amount	\$23.40
Cash Tendered	\$0.00 CAD
USD Tendered	\$25.00 USD @ 1.060000
Change	\$3.10 CAD

If foreign currency is tendered from the patron, enter this amount in the second Cash Tendered line.

The amount of change due to the patron is calculated and displayed. This amount will be in the local currency, not the foreign currency. The value of the foreign currency is determined from the exchange rate in the [Company Tab](#) of [Company Preferences](#)

Cheque/Check

The patron wants to make their payment with a cheque.



The screenshot shows a 'Payment Information' form. The 'Payment Method' dropdown is set to 'Cheque'. The 'Payment Amount' field is populated with '\$68.40'. Below this, there are three input fields: 'Cheque #' with the value '147', 'Approval' with the value 'BK', and an empty field for the employee's name or initials. A red rectangular box highlights the 'Cheque #' and 'Approval' fields.

When the Payment window opens, and you choose Cheque, the Payment Amount field is automatically populated with the total payment amount.

Verify the Payment Amount.

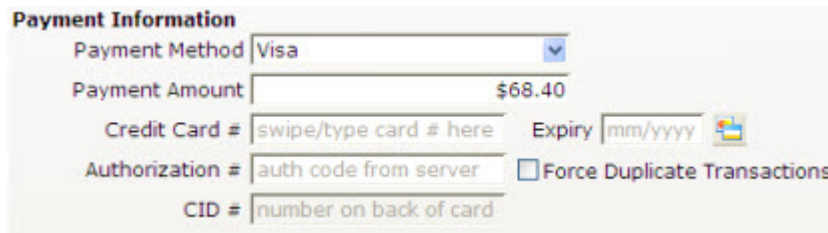
Enter the Cheque number.

This can be made a mandatory field by a master user in the Payment Methods section of the Code Tables.

Enter the employee's name or initials who approved the cheque for accuracy.

Credit Card

The patron wants to make their payment with a Credit Card.



The screenshot shows a 'Payment Information' form. The 'Payment Method' dropdown is set to 'Visa'. The 'Payment Amount' field is populated with '\$68.40'. Below this, there are several input fields: 'Credit Card #' with the placeholder text 'swipe/type card # here', 'Expiry' with the placeholder 'mm/yyyy' and a calendar icon, 'Authorization #' with the placeholder 'auth code from server', and a checkbox labeled 'Force Duplicate Transactions'. At the bottom, there is a 'CID #' field with the placeholder 'number on back of card'.

When the Payment window opens, and you choose **Credit Card**, the Payment Amount field is automatically populated with the total payment amount.

If the patron has made a previous credit card payment, the previous credit card type, number, and expire date displays as the default.

- For more information see the online help for [Code Table Payment Types](#).

Verify the Payment Amount. If this is a partial payment, change the payment amount.

The Payment Amount displays the new amount due.

Enter the Credit Card number.

Theatre Manager checks the credit card number entered to ensure it is a valid sequence of numbers. This helps prevent card numbers from being typed in wrong.




Note:

If your Workstation is equipped with a credit card swipe device, swipe the card and Theatre Manager inserts the number, card type and expiry date automatically. In addition, if the card swipe is setup to read "track 2" of the card, the name of the card owner is placed in the order notes section of the Payment Window.

Enter the credit card expire date in the mm/yy format.

Enter the credit charge authorization number.

If your venue has online credit card authorization software you do not need to enter an authorization number.

Click the **Accept Payment**  **Accept Payment** button and the card will be authorized.

If the Patron wishes to use an alternative credit card, the card number can be entered at this time.

Default settings determine if credit card number, expire date, and authorization number are optional or required. If a credit card number is recorded in the patron record, it is automatically transferred to the payment window.

Other

Payment Information
Payment Method: Other
Payment Amount: \$68.40
Other: card/id # if required
Approval: approval # if required

When the Payment window opens, and you choose **Other**, the Payment Amount field is automatically populated with the total payment amount.

Verify the Payment Amount. If this is a partial payment, change the payment amount.

The Payment Amount now reflects the new amount due.

Enter a description for the other form of payment.

Enter the employee's name or initials who approved the payment.

On Account

Payment Information
Payment Method: On Account
Accept Payment Print Tickets

Select **On Account** from the Payment Method drop down.

No payment will be received at this time, so the amount due on the order will be placed as an outstanding balance due on the patron's account.

