The ArtsMan Chronicle

January 6, 2009

ARTS MANAGEMENT SYSTEMS

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Stage

Where does the time go?

By Diane Tuma

Welcome to the year-end edition of the Arts Management Systems newsletter "The ArtsMan Chronicle!"

It's that time of year again for many of our clients. Does anyone really enjoy year-end and all the administrative tasks that are associated with it? Well, we have an article this month for you on how to do your Year-End Roll-Over - in both Version 6 and Version 7. We hope this will help make things less confusing for you.

We have a couple of interesting articles about how some of our clients are being creative and also how some are saving costs (something which is always near and dear to our hearts!).

We have even more Version 7 converts - now 45% of our clients have made the switch to the new version. If you still haven't booked a conversion time, please contact Tod Wilson at tod@artsman.com or by phone at (403) 536-1214, and he'll be more than happy to assist you!

Reminder:

Support for Version 6 has been extended until September 30, 2009.

Vancouver International Fringe Festival Doubled Attendance in 2008!

The Vancouver International Fringe Festival had an awesome season this year, in that they doubled their attendance over the previous year. This was attributable to a variety of factors, but one of the main ones was the decision to concentrate their efforts in ticket sales mainly through web sales.

David Jordan, the Executive Director of the First Vancouver Theatrespace Society which sells tickets for the Festival, said that they were finding that it was very costly to operate phone service at a very basic level. It was felt that they were offering poor phone service at a high cost. The decision was made to put most of the money that was being spent on the phone infrastructure and phone staff, into offering better online service.

In April of 2008, the organization took advantage of the opportunity to clean up their database when they did their Version 7 conversion. When they started selling tickets for Festival, their staff was fully trained and their data was clean and current. Their dedicated staff worked at making sure that everything was ready to go with the web sales module, and were helped along by the Arts Management Support Team when they hit any roadblocks. The end result was an amazing one for them.

When asked whether they will continue to focus selling the majority of their tickets online, the answer was a definite yes.

Although they found that the volume of sales was manageable with 1 web listener plus an extra one for peak load, David said that they will definitely make the investment in a couple of dedicated web listeners for the 2009 season ... less staff and increased attendance and sales!   Can it get much better?

Web Sales is a "Sweet" Deal for the Shea Center for the Performing Arts at William Paterson University

Web Sales has helped both of these venues in different ways ... one experienced cost savings and sales, while both are looking to broaden their exposure.

Many venues that are implementing Web Sales for the first time, are opting to do so when they convert over to Version 7 - that way they can take advantage of the training for the module while the trainer is onsite for the conversion.

The Shea Center for the Performing Arts at William Paterson University wanted to upgrade their Theatre Manager system to include the Web Sales Module. When Lou Hamel, the Audience Services Director, approached the University about implementing the Web Sales Module, they were all for it, however, they didn't want to commit the funds for it. Lou decided that it was time to get creative - why not use the profits from their Concessions to fund the new module!

With increasingly more venues going the route of selling tickets online and patrons looking to buy tickets to performances online, it was really an easy decision for the Shea Center to make. The only obstacle was the funding. Once they decided to use the Concession profits, it took them approximately 2 to 3 years to raise the money necessary to make this significant step. Introducing Web Sales would make them a full-service box office (phone, box office and online sales), with the intention of increasing sales.

The Shea Center had their Version 7 Conversion done in September, and that was when they started the process of implementing the Web Sales Module. When I spoke with Lou recently, I asked him if they've had many online ticket sales. He said that sales have begun and they anticipate it will increase during the spring session as more people find out and take advantage of the convenience.

Roll Over Beethoven .... Oops, I Mean Year-End!

by: Bonnie Hamilton

Well, it's that time again for many organizations .... time to get ready for your year-end! This month's tip should help you get through this process. Bonnie Hamilton, one of our Training Specialists has put together instructions on how to perform your Year-End Roll Over in both Version 7 and Version 6.

Before beginning the Year End Roll Over, be sure to complete the final End of Day route for the current year (generating the final deposit, creating all sales entries, post to the G/L, and run any G/L reports that are traditionally required. <u>Make a back-up of the database before continuing</u>.

<u>What is a Year End Roll Over</u>?

Year End Roll Over is the conversion of the general ledger from one fiscal accounting period to the next causing three things to happen:
- in the G/L, it rolls the current year monthly totals into the prior year, and prepares the G/L for the coming year.
- in the patron record, it rolls annual donation totals back one year.
- it rolls back the volunteer hourly statistics back one year.

<u>When Should it Be Done</u>?

Year End Roll Over doesn't have to be done on the last day of the season. It should be done once the organization has printed any/all of the financial reports that may need to be kept, and any of the reports the organization may need that are listed in the G/L section of Reports. You don't need to run any ticket reports, donation reports, or any other aspect of the system because they are not dependent on fiscal year.

If you have not run a Year End Roll Over, you will receive a message when trying to post. This message indicates that some sales or deposit postings were not done because they are in the next fiscal year. This gives you time to print the G/L reports and make any necessary adjustments. It's still possible to complete the End of Day without running the current Year End Roll Over.

If you do complete a Year End Roll Over and still need to make manual adjustments to the G/L, it can be done to the prior year and then a G/L report can be printed for the prior year (because of the roll over, the current year moved to the prior year). This means you can still get any financial information needed.

Reminder: Make a backup of your database before running the Year End Roll Over routine!
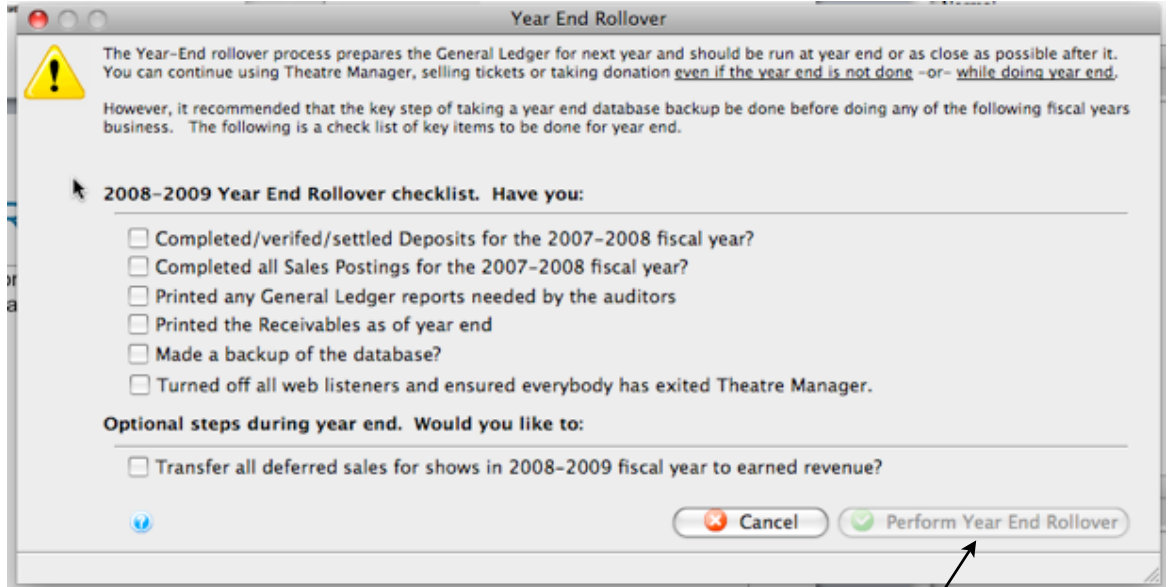
<u>How to do the Year End Roll Over - Version 7</u>

Only run the Year End Roll Over routine when the organization is ready and/or if the user is prompted to by the End of Day Wizard, which indicates that Theatre Manager is unable to post 'next' year's sales and deposit entries.

1. Make a backup of the database on ZIP disk (or some other backup mechanism) to archive away for the year. This will provide you with a year end copy of the database. Keep this for as long as needed.

2. Click Accounting>>General Ledger>>Year End Roll Over menu.
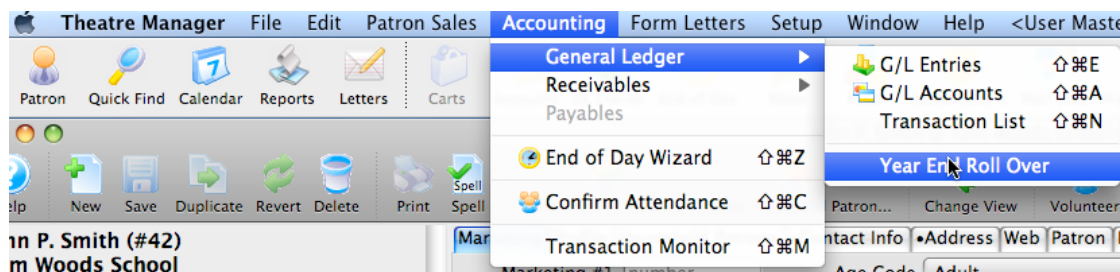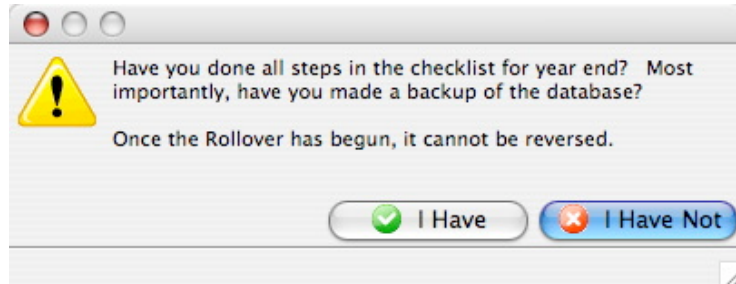
Year End Roll Over, continued

3. Check off items to confirm they are complete before proceeding with the Year End Roll Over. The optional step at the bottom of the screen should only be used on the firs day of your next fiscal year. This will change the coming year shows from being deferred revenue to earned revenue all at one time. It is a rarely (very rarely) used option and should only be selected in consultation with your finance department.

4. Click the Perform Year End Roll Over button to continue.
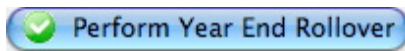
5. A window will appear confirming you are ready to run the Year End Roll Over.

6. Theatre Manager will run the Year End Roll Over process. This may take some time.

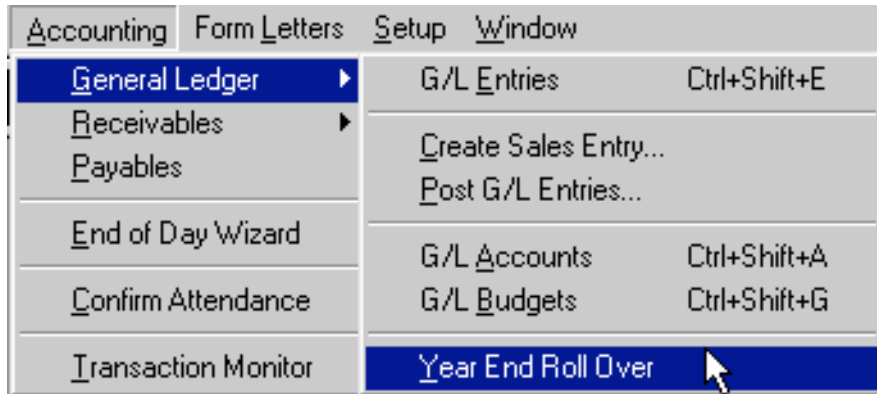7. A confirmation window will appear stating the Roll Over is complete.
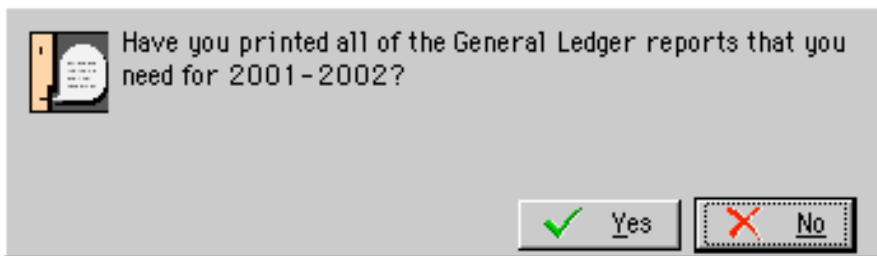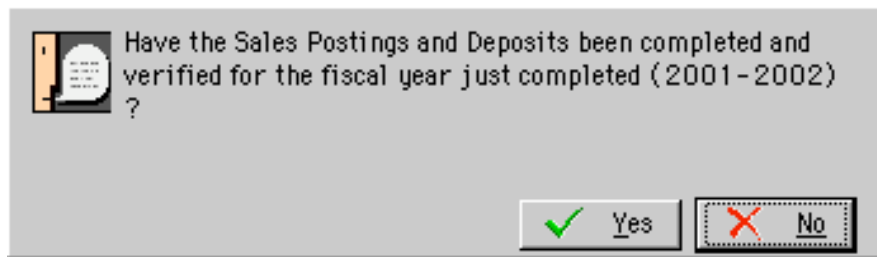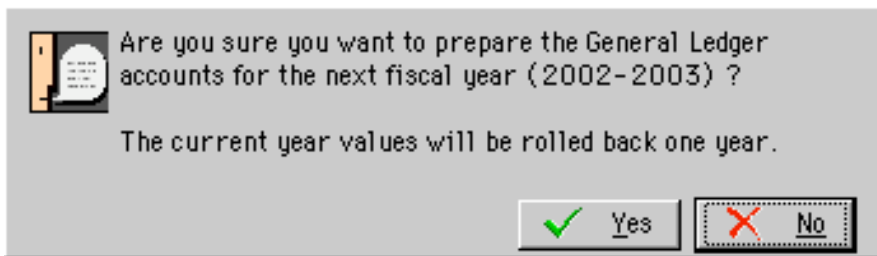
Year End Roll Over, continued

How to do the Year End Roll Over - Version 6

Only run the Year End Roll Over routine when you are ready and/or if you are prompted by the End of Day Wizard, which indicates that you are unable to post "next" years sales and deposit entries.

1. Make a backup of the database and current version of the Theatre Manager program on ZIP disk (or some other backup mechanism) to archive away for the year. This will provide you with a year end copy of the database. Keep this for as long as you need.

2. Use the Accounting>>General Ledger>>Year End Roll Over Menu

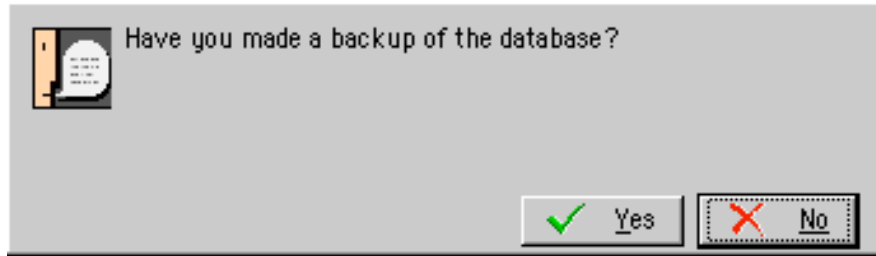| Accounting	Form Letters	Setup	Window	
General Ledger ▶		G/L Entries		Ctrl+Shift+E
Receivables ▶				
Payables		Create Sales Entry...		
		Post G/L Entries...		
End of Day Wizard		G/L Accounts		Ctrl+Shift+A
Confirm Attendance		G/L Budgets		Ctrl+Shift+G
Transaction Monitor		Year End Roll Over		

3. The following Confirmation Windows will appear confirming that you have taken all the necessary steps before the roll over. Click "Yes" if the step is complete.

Are you sure you want to prepare the General Ledger accounts for the next fiscal year (2002-2003) ?

The current year values will be rolled back one year.

✓ Yes   ✗ No

Have the Sales Postings and Deposits been completed and verified for the fiscal year just completed (2001-2002) ?

✓ Yes   ✗ No

Have you printed all of the General Ledger reports that you need for 2001-2002?

✓ Yes   ✗ No

Year End Roll Over, continued

> Have you made a backup of the database?
>
> ✓ Yes   ✗ No

4. At this point, the Year End Roll Over process will run. Once complete, you can click the "OK" button on the following window:

> Year end roll-over is complete
>
> ✓ OK
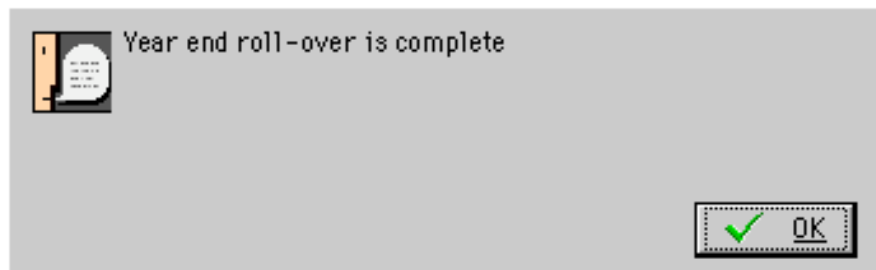
Onsite Training Saves Two Theatres Money .....

Two of our clients, the Utah Shakespearean Festival and the Plano Symphony Orchestra regularly schedule onsite training for their organizations. The main reason for scheduling training is to keep the skills for their employees sharp, as well as to train any new employees. An added bonus that both clients have discovered, is that the training ends up *saving* them money!

When I recently spoke with Kami Terry at Utah Shakespearean Festival, she said that each time they've had onsite training, they have learned ways to improve their functions and ultimately save money. During their most recent training session, the trainer showed them that they have the capability to send mass and segmented emails directly from Theatre Manager. "We had been paying for an outside service for our email newsletters and some specialized communications." Now that they can send these emails out themselves, they will end up **saving approximately $5,000** .... "the cost of the training has been more than offset by the savings the trainer has helped us find."

"I like how Theatre Manager is so expandable .... you can either scale it up, or scale it down depending of your needs."
Elizabeth Holley, Plano Symphony Orchestra

Plano Symphony Orchestra was looking at buying another software program which had a music library and also would do Personnel Management. Elizabeth Holley told one of trainers about this program when he was down there in November, and he showed Elizabeth and her staff how they could manage all their volunteers, staff and musicians through Theatre Manager. They had no idea the software could do all of this and were thrilled with the prospect of not having to buy another software package to accomplish this! They also were looking at renting software to do a live auction, and once again discovered through the trainer that Theatre Manager would be able to assist them with both a live and silent auction. Elizabeth said that by the end of the training session, the trainer had saved them approximately $5,000 between the two functions, and in these economic times, this is an terrific bonus. Elizabeth told me that "I've found that all I need to do is ask the right questions, and more often than not, I discover that I already have the tools I need at my disposal in Theatre Manager."

ARTS MANAGEMENT SYSTEMS

The Arts Management Team

- how to reach us .....

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