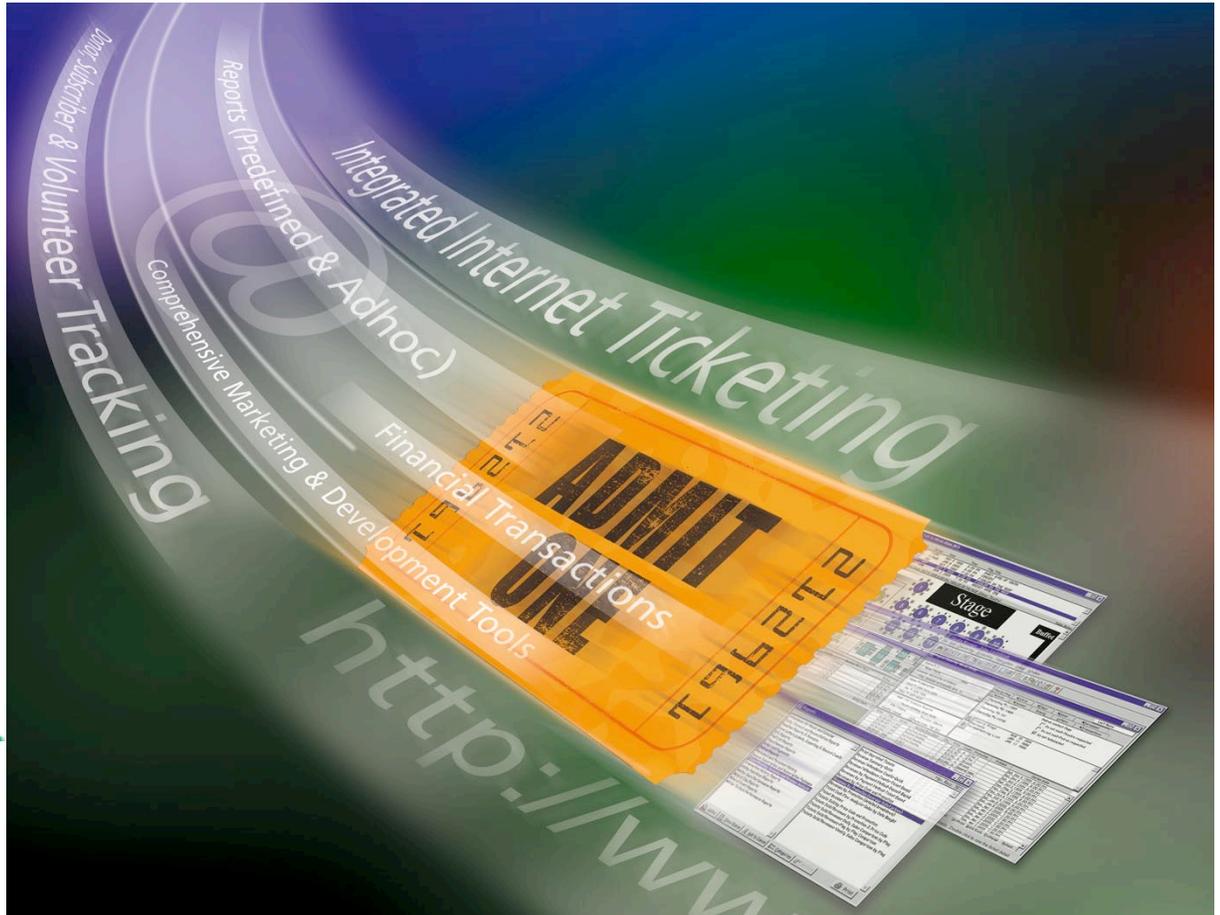


# The ArtsMan Chronicle

November 9, 2009

AMS<sup>DO</sup> ARTS  
MANAGEMENT  
SYSTEMS



## Busy Days at ArtsMan!

By Diane Tuma

The past few months have been busy ones here at ArtsMan.

We've spent a significant amount of effort upgrading venues to Version 8 with the result that more than 70% of our clients are now converted from Version 6. Kathy from the Globe Theatre in Regina ([www.globetheatrelive.com](http://www.globetheatrelive.com)) just sent us a note to "express her excitement on seeing some of the upgrades in Version 8", which is consistent with the feedback of those who have converted.

In this issue of the ArtsMan Chronicle, there is a lot of news. We have interviews with Pioneer Theatre Company, Ballet Memphis and Proctors Theatre. There is some information on creating Form Letters, as well as a few mini tips for you.

I hope that you will take a short break from your busy work schedule to read the newsletter.

Enjoy!

### Version 6 Support Update:

*Due to current economic conditions, many clients have been unable to prepare for a conversion to Version 7. Support for Version 6 will continue through to the end of 2010 with some limitations.*

## Welcome to our Newest Clients ....

Please join us in welcoming to the newest members of the ArtsMan family!

Located in Lethbridge, Alberta, The University of Lethbridge ([www.uleth.ca](http://www.uleth.ca)) joined us in July 2009. They are using Theatre Manager in both their Athletics and Theatre Departments.

Playhouse on the Square ([www.playhouseonthesquare.org](http://www.playhouseonthesquare.org)) had their installation in September 2009. They are Memphis' Professional Resident Theatre Company and have been in existence since 1969. They are currently in the process of constructing a new building and the Grand Opening will be in January, 2010.

In October, 2009, the Opera on the James, ([www.operaonthejames.org](http://www.operaonthejames.org)) joined us as new Theatre Manager users. Located in Lynchburg, Virginia, the Opera on the James is an organization of music lovers who seek to further the appreciation and enjoyment of opera through community education, promotion of the art form, and support of opera singers and musicians.

The Yukon Arts Centre ([www.yukonartscentre.com](http://www.yukonartscentre.com)) in Whitehorse, Yukon also had their installation in October. The Yukon Arts Centre (YAC) is a not for profit charitable organization dedicated to the development of the arts as an important cultural, social and economic force in the Yukon. We intend to be model for the development of the arts in the North and a stimulus for a vibrant and creative territory. YAC is the territory's premier venue for performing and visual arts.

## Pioneer Theatre Company - Happy to be on Version 8!

I spoke with Colleen Lindstrom at Pioneer Theatre Company ([www.pioneertheatre.org](http://www.pioneertheatre.org)) about their recent training experience and conversion from Version 6 to Version 8.

Colleen said that they are enjoying working with Version 8 very much. In fact, they are enjoying it much more now than when they first converted. When I asked her why, she answered with what many people find ... "it's hard to change from doing things one way to a new one. The reports are different and the way to get the reports is different, however, now that I've been working with it for a while, I like it a lot more than Version 6". Colleen has found that there is a lot more information and data available for them to use.

When they were making the decision to move from Version 6 to 8, Pioneer Theatre Company wanted to just do a self-Implementation and have a bit of telephone training to get them going. Colleen is now grateful that we advised them to have someone come onsite to do a proper training session. She said that the training session was "very valuable. There is just so much information to go through and the trainer used every minute wisely."

As they were going through the training and asking questions, Colleen said that she found out that Theatre Manager could do things that she didn't know it could. She was even more surprised to find out that these same capabilities were always available in Version 6. "I found myself saying 'I didn't know it could do that' at least 5 times throughout the training session!"

When I asked Colleen if there was anything else she wanted to share with us, she said that she appreciates the ongoing upgrades to Theatre Manager and how we listen to suggestions on how to incorporate things into the software. She likes how the development team works with the clients to add things in and make changes to help make the system even better than it already is.

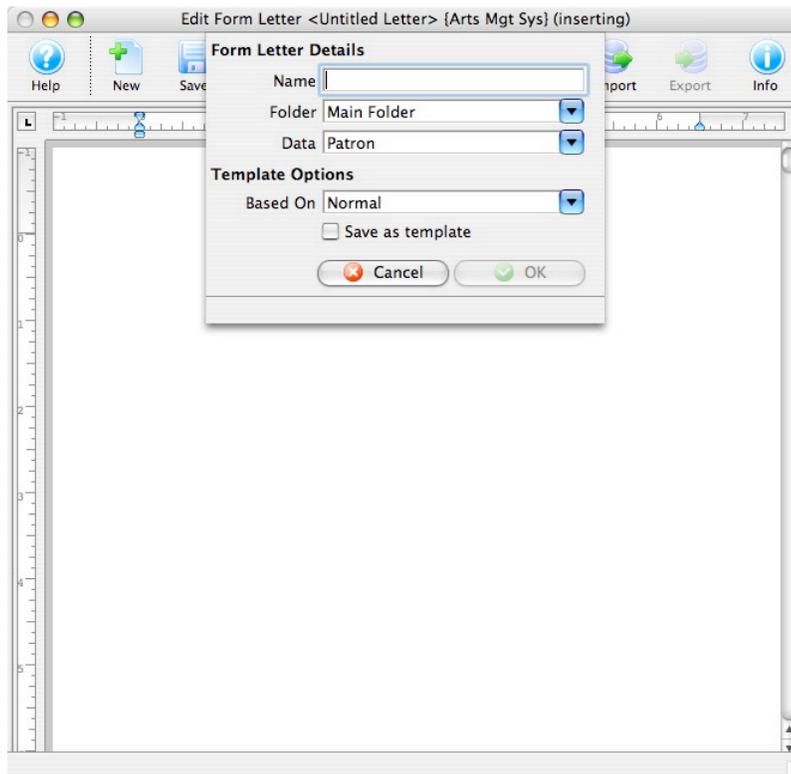


*If you haven't spoken with anyone at Arts Management Systems yet about upgrading to Version 8, please contact Tod Wilson by phone at (403) 536-1214 or by email at [tod@artsman.com](mailto:tod@artsman.com)*

# Creating a New Form Letter - Versions 7 & 8

Form letters can be created for many different purposes. They can be used to send information to patrons, donors, volunteers, employees, and members of the media. A new form letter can be created from the Form Letter List Window.

1. From the Form Letter List window, click the  **New** button. [Click here](#) for more information on the Form Letter List window. [Click here](#) for more information on the Version 7 Word Processor. This will open the Word Processor with a new blank page.



2. Enter the Form Letter details. [Click here](#) for more information on the Form Letter Info Window. [Click here](#) for more information on the Form Letter Window.

Enter a the name of the letter. Select a folder to save the letter to. Choose the merge data for this letter. Patron data is a parent for most other files. If other merge criteria is selected the patron record details will also be available as criteria. Due to the relationship of data within Theatre Manager some items can not be merged together.

Select the Template for use in this letter. The Normal Template is the default template.

3. Click the  **OK** button.

4. Create the base letter.

5. Using the right-click context menu, add merge fields to the Form Letter. [Click here](#) for more information on adding merge fields to the Form Letter.

6. Click the  **Save** button on the toolbar to finalize the Form Letter.

*PCCharge Expiry Year*

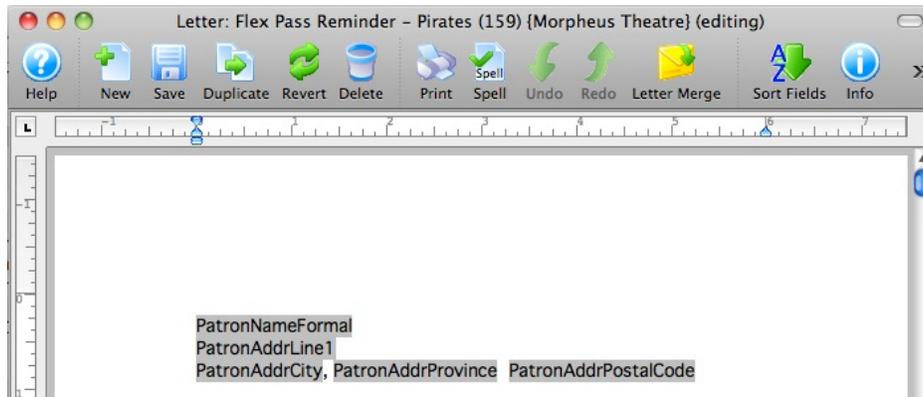
*PCCharge stores a maximum expiry year within the program. This year needs to be increased from time to time as expiry years continue to advance.*

*To adjust the Credit Card Year:*

- \* Open PCCharge
- \* Click Setup
- \* Click Configure System
- \* Increase the Last Valid Year. We recommend increasing the year by 10-15 years from the current one.

## Creating a New Form Letter - Version 8 (cont'd)

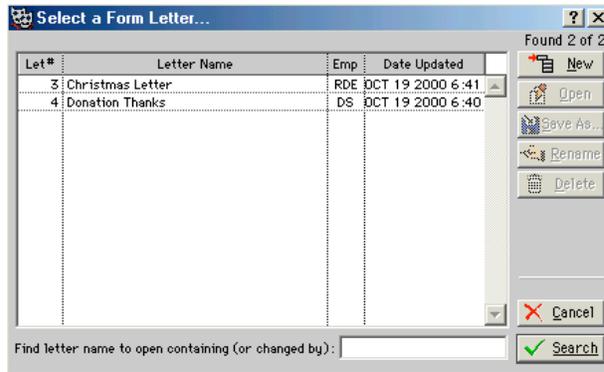
- Once the form letter is done, it is a simple step to merge the letter or do an email blast to patrons by clicking on the 'Letter Merge button. [Click here](#) for the link to our help pages.

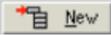


## Creating a New Form Letter - Version 6

A new form letter can be created from the [Form Letter Selection Window](#).

- Click the **Form Letter** button  on the toolbar. The Form Letter Selection Window will open.



- Click the **New**  button to create a new Form Letter. The word processor will open with a new blank page.
- Create your Form Letter.** [Click Here](#) to learn how to add merge fields to your form letter.
- Click the **Save**  button on the toolbar. This will open the Save As Window.



*Year End Rollover*

*It's getting to be that time of year again for many of our clients.*

[Click Here](#) to learn more about how to do your Year End Rollover .

You can also [Click Here](#) to access the article in a previous newsletter.

## Creating a New Form Letter - Version 6 (cont'd)

5. Enter the name of your new letter.
6. Click the **Save**  **button to save the letter.** Clicking the **Cancel**  button will cancel the save function and return you to editing the new letter.
7. To merge letters, [Click Here](#) for the help pages.
8. Emails may be sent in Version 6 if the letters were added to the patron. [Click Here](#) for more more information on the help pages.

## The Two Jerry's ...

Jerry, from Smuin Ballet ([www.smuinballet.org](http://www.smuinballet.org)), sees himself on the screen each day when he starts up Theatre Manager. So, when Bonnie Hamilton was onsite for some training in January, Jerry decided to dress up like his alter ego and have some fun.

As with most of our other clients that have upgraded from Version 6, Jerry was excited about the new Version and was most appreciative of the training Bonnie provided and found that it helped make his day more productive. Celia Fushille, the Artistic and Executive Director at Smuin Ballet told me, "We loved having Bonnie here! She was a total delight to work with!" It certainly looks like they were having fun ....



← This is Jerry .....

and this is Jerry showing off his alter ego in Theatre Manager!



*End of Day Quick Tip:  
Hundreds of people do an  
End of Day each to find  
Theatre Manager in balance.  
However, the odd time, an  
issue might arise that is  
difficult to find. If you do have  
an imbalance, deposit, create  
sales entries as you normally  
would and note the out of  
balance amount. When  
done, continue your daily  
sales as normal. However,  
contact Support for  
assistance by phone at (403)  
536-1211 or by email at  
[support@artsman.com](mailto:support@artsman.com). If  
possible, balancing issues  
should be handled on the day  
they are noted. The longer  
an imbalance is left, the more  
difficult it may be to locate.*

## Welcome to Ballet Memphis!

Located in Memphis Tennessee, Ballet Memphis ([www.balletmemphis.org](http://www.balletmemphis.org)) is currently celebrating its 23<sup>rd</sup> season and is a unique blend of a ballet company, ballet school, educational enrichment and Pilates Centre. In May, Ballet Memphis became a part of the ArtsMan family and is happy that they have made the transition.

Their original program was one that was customized for them many years ago using ACCESS. As new people entered the organization, they brought in new software for various functions, and they ended up with a hodgepodge of software programs often doing functions that were overlapping. Janet Parke, School Principal and Junior Company Director said that this was “very frustrating. The point to having a database is to keep one, not many. Now all the information is one place, and everyone can access it. We are finally in that world!” Janet finds it great now that they can see *everything* that a student (patron) is doing, from Pilates classes, to dance classes to donations.

Philip West, the Managing Director, said that when they were looking at different software packages, the deciding factor for them was the fact that “Arts Management Systems was excited to have us as a client and was willing to work with us and take extra steps to do some customization for us.”

There were a few hurdles for them in the beginning, but Janet attributes that more to semantics than anything else. In the school part of Ballet Memphis, they refer to Patrons as Students, and they sell Courses and Classes as opposed to Tickets. Once they got rid of the old terminology in their own minds, things ran much more smoothly for them.

Janet said that the training experience was a good one, and it was fun to learn with someone who so obviously loved what they were doing. ArtsMan had a trainer in the same city a few months later, and we were able to coordinate some extra follow up work and training time for them. Janet felt that it was helpful to have that extra time to go through things once they were able to absorb what they had learned in the first session.

Recently, they held their auditions and rehearsals for The Nutcracker. Every aspect of the process used to be handled separately, but this year, Janet was able to set up the roles, casting schedules, rehearsal schedules all in one place. All the communications were handled through Email Blasts, and she said that the great thing was, “I only had to enter the casting once!” Mail lists were a unique way for them to approach this process, but it worked very well for them.

Philip said that he knew they had made the right decision, when the staff all welcomed the Artistic Director back from her vacation asking, “How was your trip?” followed immediately with “We love the new software!”

That makes us extremely happy as their new supplier and we are also excited to have them as clients!

*“Thank you for all your time and patience in upgrading the Conservatory at MRU to the new Theatre Manager system. You were very easy to work with and everyone here valued all the info you passed on; it made us appreciate TM more.”*

Miriam Fabijan  
Mount Royal University  
([www.mtroyal.ca](http://www.mtroyal.ca))

*“We have had to use support quite a bit over the past few months, and I wanted to extend our thanks on how helpful you and your team have been, especially understanding the urgency of some of our requests. It has been much appreciated.”*

Heather Regan  
University Centre Farquhar  
Auditorium & UVic Ticket  
Centre  
([www.auditorium.uvic.ca](http://www.auditorium.uvic.ca))



## September 25th was an absolutely ‘Wicked’ Day at Proctors Theatre

It was a HUGE on-sale day when “Wicked” tickets were made available to the general public for the first time. 8,121 tickets were sold valued at \$622,554.48 which, for Proctors ([www.proctors.org](http://www.proctors.org)), this represented twice the sales volume of any previous single day and three times the on-sale of the previous record holder, Phantom of the Opera. As far as we know, it also represents the single largest single day transaction volume at any venue – and they were pleased to report that Theatre Manager just worked like a charm!

What was the key? In a word, planning. This amazing success story happened because the staff at Proctors made meticulous preparations including having the correct infrastructure in place. We think all our clients might find something interesting in the Proctors’ experience to apply to their venues.

What did Proctors do? Proctors knew it was going to be a very busy day so they implemented a number of key decisions such as:

- Training and preparing all staff to jump in, answer phones and sell tickets if needed. This included unlikely heroes like their CEO, secretaries, finance department, marketing and other departments not normally involved with actual sales. The report from all was ‘tiring, but fun’.
- Working with all their key constituents on contingency planning in case anything went awry. This included sharing plans with telecom providers, internet providers, web designers, staff, Arts Management, local coffee concession people ... anybody who might impact the overall experience of a customer walking into the venue on that day.
- Verifying that all hardware, software and data content were at the latest versions approximately two weeks in advance of the on-sale date and implementing a freeze on any system changes. Data content is an often overlooked (yet important) checklist item because it involved answering machine messages, descriptions on the marketing web site, signposts in the lobby, posters, data settings in Theatre Manager, and more.
- Actively running through a number of test scenarios for all their systems like loading up the phone system and volume testing Theatre Manager.
- Making sure there was adequate sales capacity which basically meant enough workstations and web listeners to handle the expected volume of walk up and online buyers.
- Developing alternate strategies in case any one process failed.

Since the scale of the expected sales was unknown and certain to exceed expectations, we at Arts Management Systems did what we could to help. Well in advance, we upgraded the database server version, upgraded Theatre Manager, verified that web pages matched our reference standard, solved any identified issues in the key TM processes that they used, and provided unlimited Theatre Manager licensing for the day. We also made sure that our technical resources were available all day as contingency.

On a normal day, Proctors needs 4 web listeners for Internet sales. In preparation for this event, they took advantage of the scalability of the web services in Theatre Manager and reallocated 8 more of their non-essential workstations as web listeners to process Internet transactions. CEO Philip Morris confirmed that “the ability to activate web listeners at will was a significant factor in the design of Theatre Manager that allowed us to ensure this day could be successful”.

In the end, Proctors had a fantastic day of sales and everybody shared in the excitement. Was it a perfect glitch free day? No – but almost. The sales volume exceeded expectations and the phone service provider needed to activate extra phone lines in short order – within minutes of being needed. Theatre Manager ran flawlessly all day with only one web listener needing to be restarted at the beginning of the day to get it to join the web listener pool.

Our congratulations go out to Proctors Theatre!

at  
**PROCTORS**

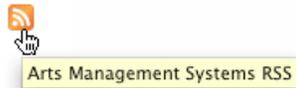
*8,121 tickets were sold, valued at \$622,554.48 representing twice the sales volume of any previous single day sale and three times the on-sale of the previous record holder, Phantom of the Opera!*

*This amazing success story happened because the staff at Proctors made meticulous preparations, including having the correct infrastructure in place.*



### The Arts Management Website now supports RSS feeds.

Subscribing to the RSS feed is a great way to stay up-to-date with what is new with your software and Arts Management Systems. To subscribe to this feed, use the link <http://www.theatremanagerhelp.com> and click on the RSS feed icon in the lower right hand corner. The icon looks like this:



Depending on your browser, you will need to select how you would like to receive your RSS subscription.

We urge you to subscribe to the RSS feeds, as in the future, this will be how you will receive Theatre Manager update notifications.

## The Arts Management Team

- how to reach us .....

### Support:

Phone: (403) 536-1211  
Email: [support@artsman.com](mailto:support@artsman.com)

### Sales Related Inquiries (Tod Wilson):

Phone: (403) 536-1214  
Email: [tod@artsman.com](mailto:tod@artsman.com)

### Ticket Sales (Laura Easterbrook):

Phone: (403) 536-1204  
Email: [laura@artsman.com](mailto:laura@artsman.com)

### Sales Administration (Diane Tuma):

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[www.artsman.com](http://www.artsman.com)