

## Theater Manager's Patron Management



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This is a Draft document. If you find any errors or omissions or have any other comments, please direct them to [barb@artsman.com](mailto:barb@artsman.com).

## Documentation Conventions:

For the Draft, all cross references within the document are highlighted.

## Table of Contents

<b>PATRON MANAGEMENT.....</b>	<b>5</b>
STARTING PATRON MANAGEMENT .....	5
FINDING A PATRON FROM THE CONTACT LIST WINDOW.....	6
<b>ADDING A NEW PATRON .....</b>	<b>9</b>
<b>PARTS OF THE PATRON WINDOW .....</b>	<b>11</b>
PATRON DISPLAY .....	11
CONTACT CARD.....	12
PATRON RIBBON BAR.....	13
PATRON TABS.....	14
<i>Patron Detail Tabs</i> .....	14
<i>Patron Account Tabs</i> .....	15
<b>DELETING EXISTING PATRON INFORMATION .....</b>	<b>17</b>
<b>PATRON CONTACT CARD .....</b>	<b>19</b>
EDITING PATRON INFORMATION .....	19
PARTS OF THE CONTACT WINDOW.....	20
<i>Ribbon Bar</i> .....	20
<i>Patron Details</i> .....	21
<i>Address Details</i> .....	21
<i>Contact Details</i> .....	23
ADDING AN ADDRESS.....	24
REMOVING AN ADDRESS .....	25
ADDING CONTACT INFORMATION.....	26
REMOVING CONTACT INFORMATION .....	27
<b>ADDING A PATRON USING THE CONTACT CARD .....</b>	<b>28</b>
<b>SCHEDULE CHANGES TO THE CONTACT CARD .....</b>	<b>30</b>
DELETE A SCHEDULED CHANGE .....	33
<b>MERGING PATRONS.....</b>	<b>34</b>
FINDING DUPLICATE RECORDS .....	35

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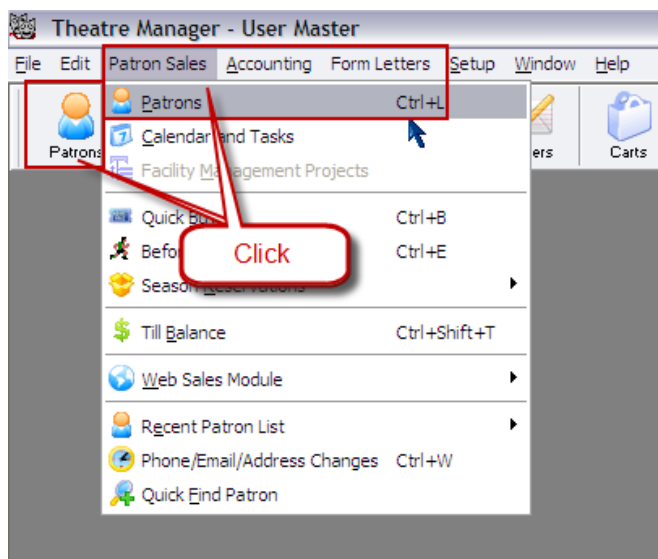
## Patron Management

### Starting Patron Management

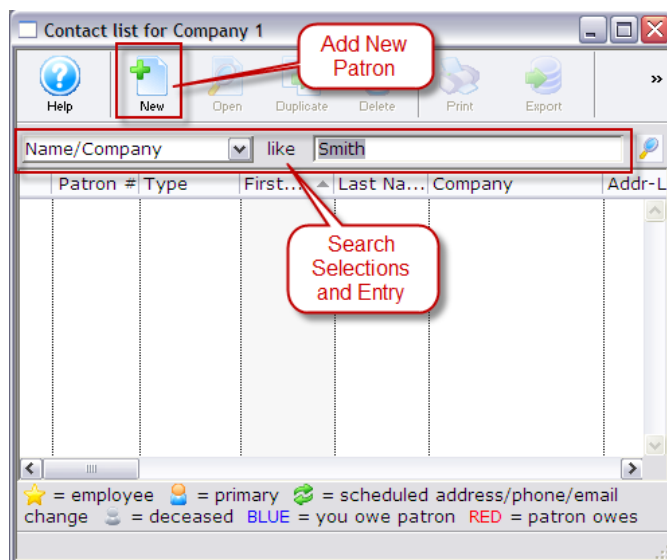
The Patron Management portion of Theatre Manager, allows you to store and organize phone numbers, addresses, dates, notes, lists, and more for your patrons. Similar to a personal information manager, Theatre Manager is designed to store information about your customers, volunteers and donor prospects, set up schedules, payments and phone calls, and organize email and text documents. With the massive amounts of data a person encounters each day, a single location for storing that data is attractive. Features of a contact manager might also include the ability to store passwords, important dates and appointments, and the capability of sharing data with another computer

Every transaction in Theatre Manager is tied to a patron record. A patron record holds information about the patron such as contact information, donation history, membership details and ticketing history.

To access Patrons:



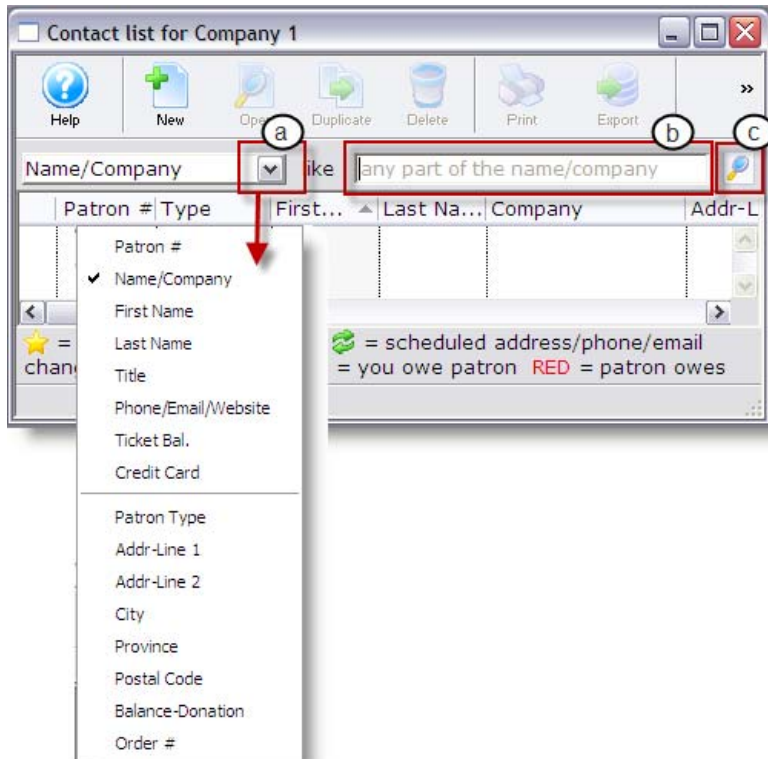
1. Click the **Patrons** button in the Ribbon bar or select **Patron Sales>Patrons** from the windows menu. The Contact List for Company window opens.





2. From here, you can **Search** for an existing Patron or **Add** a new Patron.

- See Adding a New Patron, page 5
- See Finding a Patron from the Contact List Window, page 6

## Finding a Patron from the Contact List Window

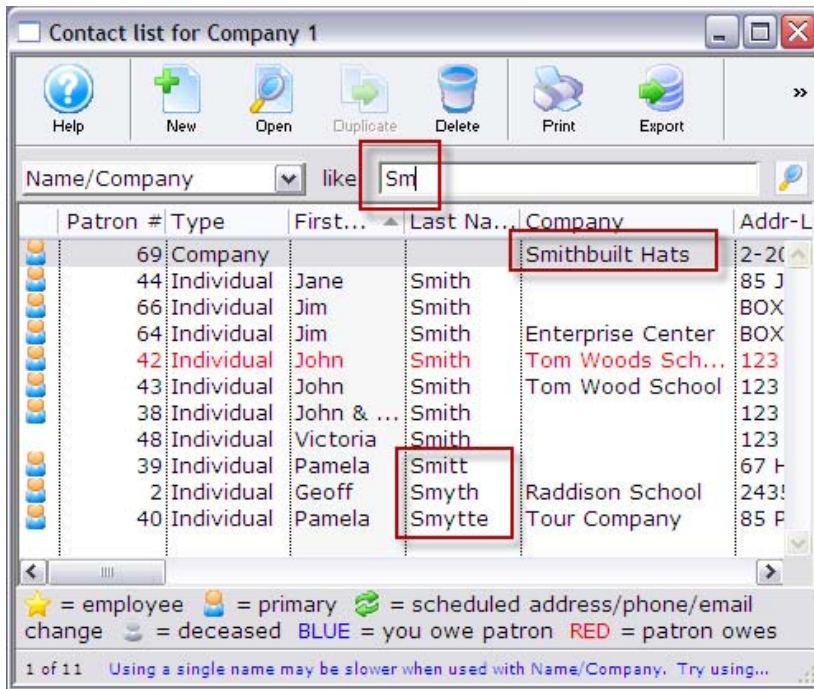


1. Click the **Patron**  button in the tool bar. The Contact List window opens.
  - a. You have the option to choose a search option from the drop-down list.
  - b. Type the last name into the "From" field.
  - c. Click the Search  button or hit enter.
2. The results of the search will appear in the contact list.



### NOTE:

Theatre Manager allows the use of wildcards when searching. Wildcards are substitute characters for normal characters in a search string. In Theatre Manager, the % symbol can be used in place of other characters. Therefore, to search for all patrons that live on the same street, a wildcard can be used for the house number. An example search would be '% main' to search for all patrons that live on Main. This could be Main Street, Main Avenue, etc.



As you can see in this example, the search was by:

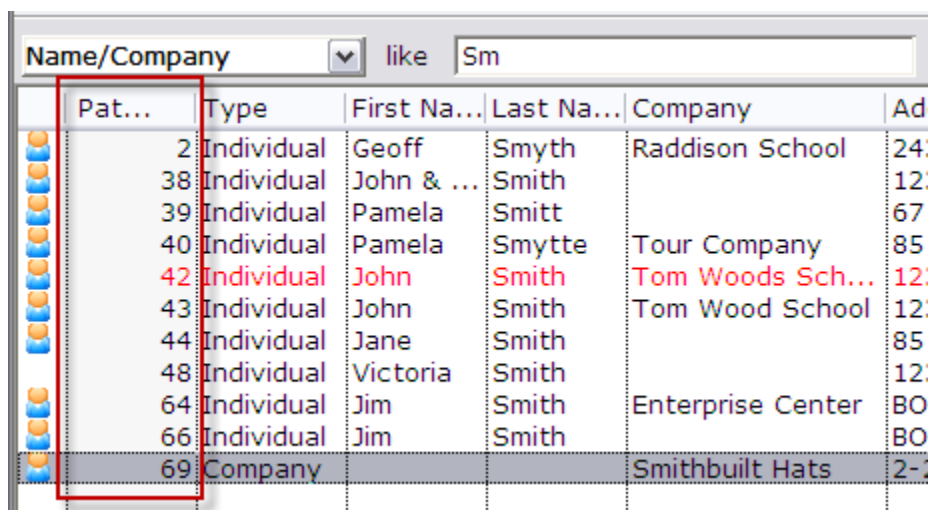
- Name/Company
- Like SM

The search returned all Patrons starting with the last name or Company name of SM and is displayed by Company, then Name (alphabetic) and when the last names are the same, by alphabetic on the first name.

To change the order of the listing, clicking on the column headers will sort the list by that column. For example, to change the listing to sort by Patron Number:

1. Click the Patron # column header.

This button is located at the top left hand corner of the patron list window. When it is selected the list of patrons will sort by patron number. Clicking the column header again will reverse the listing.



2. Double-click to open the patron searched for. The patron record will open.

Jim Smith @ Enterprise Center (#64) {Company 1}

Help New Save Duplicate Revert Delete Print Spell New Hous... Delete Ho... Volunteer Employee Change Vi...

Household Members

All Household

- Jim Smith
- Edna Duggen

**Jim Smith (#64)**  
Enterprise Center

Home (250) 449-2896

Home

BOX 33  
502 4th Street  
Midway BC V0H 1M0

Marketing Profile Household Patrons (2)

Credit Card	Household	Match
Donor	Stats	Media
Volunteer		

•Contact Info •Address Web Patron

Patron special needs	sales wint	\$0.00
Last ticket purchase		\$0.00
Total memberships		\$0.00

General patron notes ☒ Remind employee o

Has mobility issues and prefers main level

Ticket Donation Play Mail List Membership Relation Order Payment Letter Season Tran Stat Giving Cart

Status Order # Play Performance Play Title Section/Row/Seat Qty Total Cost P Promotion Desc-External

☺ = part of season pkg. BLUE = you owe patron RED = patron owes you MAGENTA = reservation only GRAY = contains archived tickets

Tickets Detail Refund Print Un-Print Map All Tick... All Years

- For more information on **Parts of the Patron Window**, see page 11.



## Adding a New Patron

Patrons are added to the database as an individual or as a member of a household.

A household, groups together common buying units or patrons that share some of the same contact information. A household might be workers in a company, members of a service group or a family in a home.

The word household can be customized under Appearance tab in Company Preferences. For more information on Company Preferences, please refer to the online help.

When you add a patron, Theatre Manager creates a unique Patron number for each new Patron record entered. Patron numbers cannot be reused if a patron is deleted or merged.

The amount of mandatory fields (meaning they must contain a value) required to be entered is defined by your organization. For more information on defining Mandatory Data, please refer to the online help.



1. Click the **Patrons** button in the Ribbon bar or select **Patron Sales>Patrons** from the windows menu. The Contact List for Company window opens.



2. Click the **New** button. The New Household window opens.

New Household {Company 1} (inserting)

Help New Save Duplicate Revert Cancel Print Spell

New Hous... Delete Ho... Volunteer Employee Change VL...

Type: Individual

Salutation:

Name: first name initial last name

Company: company

Title: title of patron

Location: Home

Address: address line 1 address line 2

City: Calgary State: AB

Country: USA Zip Code: postal/zip code

Phone: Home phone number

Volunteer		Credit Card		Household		Match	
Patron		Donor		Stats		Media	
Marketing	Profile	Household Patrons		Contact Info	Address	Web	
Marketing #1	number			Age Code	Adult		
Marketing #2	number			Mktg #6 (pop-up)			
Marketing #3	character			Mktg #7 (pop-up)			
Marketing #4	character			Mktg #8 (pop-up)			
Marketing #5	text value						

**Patron Contact Flags**

☐ Do not mail-theatre requested ☐ Do not e-mail ☐ Do not trad


☐ Do not mail-patron requested ☐ Do not delete

Ticket Donation Play Mail List Membership Relation Order Payment Letter Season Tran Stat Giving Cart

Status	Order #	Play	Performance	Play Title	Section/Row/Seat	Qty	Total Cost	Pc	Promotion	Desc-External
= part of season pkg. BLUE = you owe patron RED = patron owes you MAGENTA = reservation only GRAY = contains archived tickets										

3. Enter the appropriate information into the patron fields. If you have NOT entered all the mandatory information, Theatre Manager displays a message in the status bar at the bottom of the window or an error message describing what needs to be completed.



4. When you have finished entering the new patron's information, click the **Save**  button. The patron's record is saved in the database and a patron window opens.

Alexander Jones @ Enterprise Center (#68) {Company 1}

Help New Save Duplicate Revert Delete Print Spell New Hous... Delete Ho... Volunteer Employee Cha

**Alexander Jones (#68)**  
Enterprise Center

Home (250) 449-5432  
Home alex.jones@enterprisecenter.cor

Home  
BOX 21  
405 Gertrude Street  
Midway BC V0H 1M0

Volunteer		Credit Card
Patron		Donor
Marketing	Profile	Household P
Marketing #1	number	
Marketing #2	number	
Marketing #3	character	
Marketing #4	character	
Marketing #5	text value	

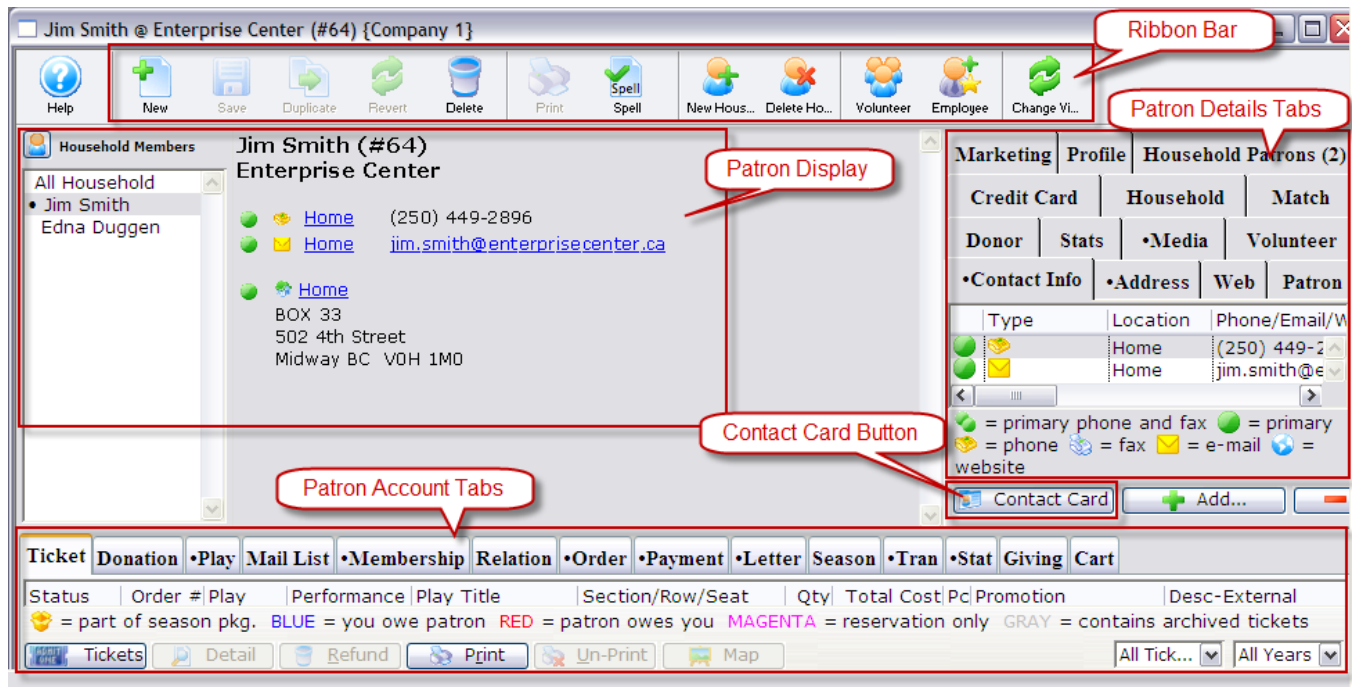


#### NOTE:

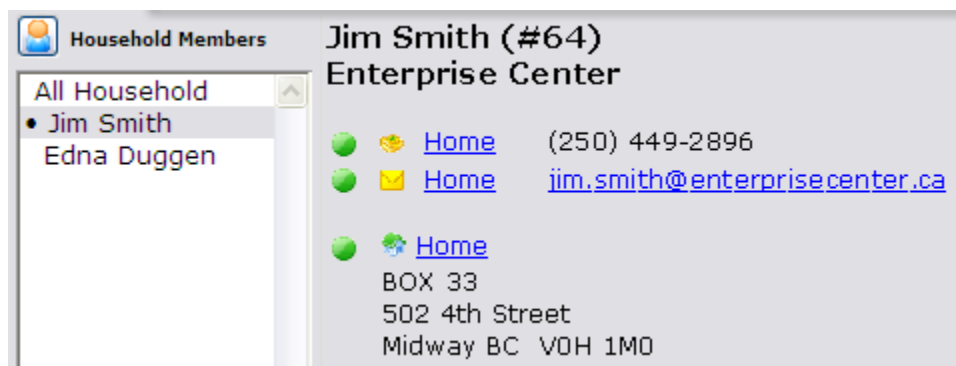
This Patron now appears on the Contacts List window.

- For more information on the **Parts of the Patron Window**, see **page 11**.

## Parts of the Patron Window



## Patron Display




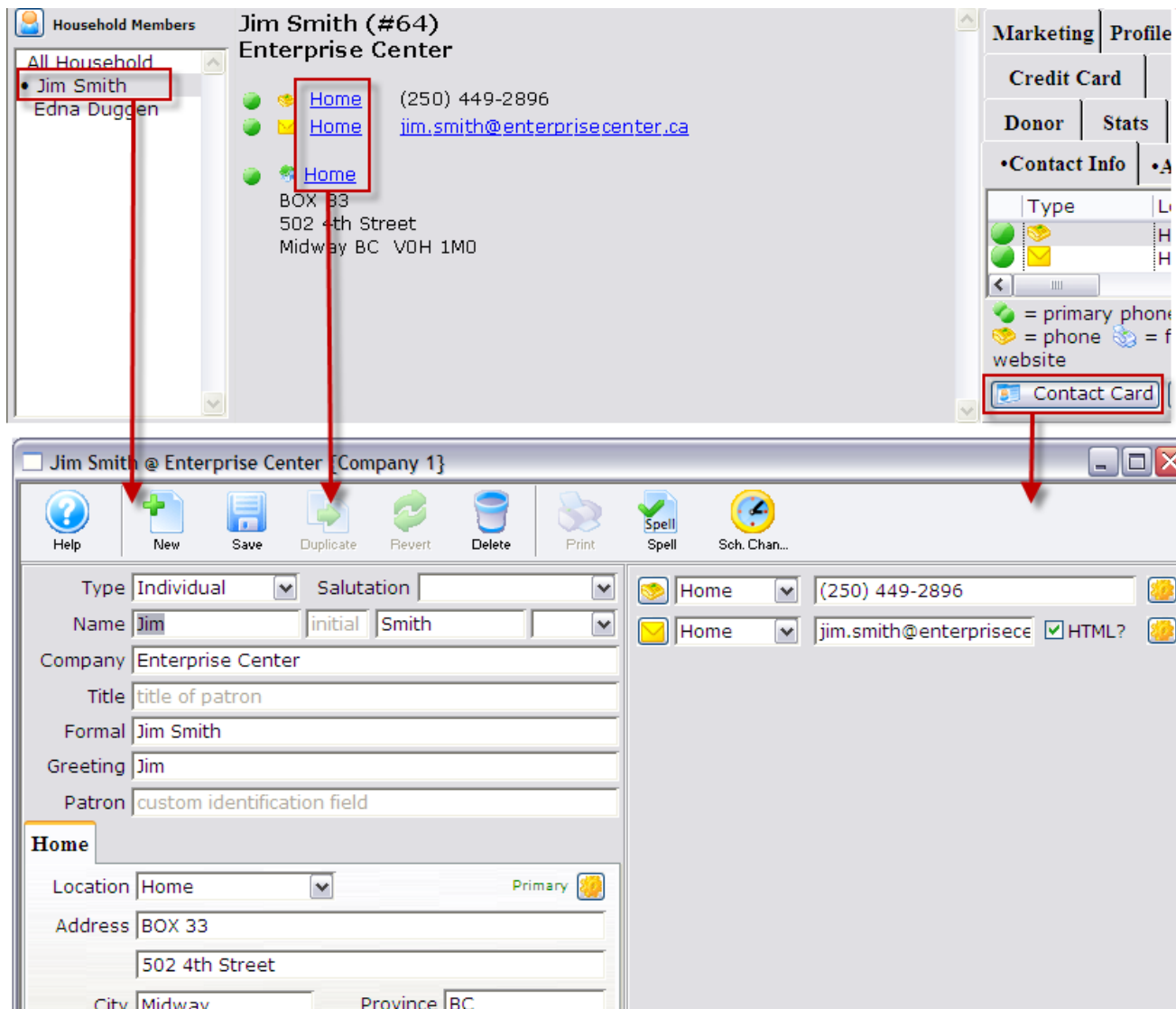
The Patron Display gives pertinent information about the Patron, including other household members, telephone, email and address information.

- Double click the name of the person in the Household List or click the underlined [Hyperlink](#) in the details portion of the display will open the contact card.

## Contact Card

Clicking any of the following in the Patron Display will open the Contact Card.

- Double click the name of the person in the Household List
- The underlined [Hyperlink](#) in the details portion of the display
- The Contact Card  **Contact Card** button.



The screenshot displays the Patron Display interface for Jim Smith (#64) at Enterprise Center. The interface is divided into several sections:








- Household Members:** A list on the left showing "All Household" members: Jim Smith and Edna Duggen. Jim Smith's name is highlighted with a red box and a red arrow pointing to the "New" button in the toolbar.
- Details:** The main section displays information for Jim Smith, including his name, phone number (250) 449-2896, email address jim.smith@enterprisecenter.ca, and address (BOX 33, 502 4th Street, Midway BC V0H 1M0). The "Home" hyperlinks are highlighted with a red box and a red arrow pointing to the "Duplicate" button in the toolbar.
- Marketing/Profile:** A sidebar on the right contains tabs for "Marketing" and "Profile". The "Marketing" tab is active, showing a "Credit Card" section, a "Donor" section, and a "Stats" section. The "Contact Info" section is also visible, showing a list of contact types (Home, Work, etc.) and a "Contact Card" button, which is highlighted with a red box and a red arrow pointing to the "Contact Card" button in the toolbar.
- Toolbar:** A horizontal toolbar at the top of the details section contains buttons for "Help", "New", "Save", "Duplicate", "Revert", "Delete", "Print", "Spell", and "Sch. Chan...".
- Form Fields:** Below the toolbar, there are form fields for "Type" (Individual), "Salutation", "Name" (Jim Smith), "Company" (Enterprise Center), "Title" (title of patron), "Formal" (Jim Smith), "Greeting" (Jim), "Patron" (custom identification field), "Home" (Location: Home, Address: BOX 33, 502 4th Street, City: Midway, Province: BC), and "Contact Info" (Home, Work, etc.).

- For more information on the Contact Card, see page 19

## Patron Ribbon Bar



The Patron Ribbon Bar gives you quick access to the following functions:

	Opens the online Theatre Manager Help <a href="http://www.theatremanagerhelp.com/">http://www.theatremanagerhelp.com/</a>
	Opens the New Household window, where you can add a new patron. <ul style="list-style-type: none"> <li><b>For more information on Adding a New Patron, see page 9</b></li> </ul>
	Saves changes and additions to the Patron record.
	Discards any changes that you have made to the record up to the last time the record was “saved”.
	Deletes the current Patron. You will not be able to delete a patron if it is referenced by other files.
	Prints the selected record.
	Opens the Spell Checker dialog.
	Opens the Patron Contact Card to add a new Patron to an existing Household. <ul style="list-style-type: none"> <li><b>For more information on Adding a New Patron, see page 9.</b></li> </ul>
	<div> <div> <input checked="" type="checkbox"/> (#65) Edna Duggen  <input type="checkbox"/> (#64) Jim SmithEnterprise Center </div> <div>Opens a list allowing you to choose the Patron you want to delete from the Household.</div> </div>
	The Volunteer Window will open with the data of the patron.
	Add the Patron as an Employee.
	Toggles the view of the Patron displayed in the window to show marketing information, sales information or both at the same time.

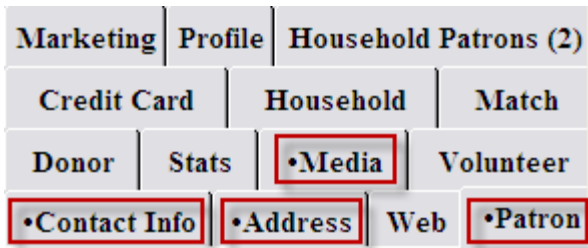
## Patron Tabs

There are two different sets of tabs on the patron window. There are the Patron Detail Tabs which harvest information about the actual patron, their personal details, and other information that relates to them as a person. Whereas the Patron Account Tabs carry information significant to the patrons account, their tickets, orders, contact history, and transactions.

### Patron Detail Tabs

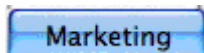


The patron detail tabs are located in the upper right hand corner of the Patron window. The Marketing Tab is automatically selected when Theatre Manager is started.

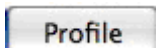


In some instances, one of the tabs may have a bullet prior to its name. The bullet lets the user know that there is information stored in the tabbed field.

For example, in this example there is information in Media, Contact Info, Address and Patron.



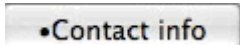
The **Marketing** tab displays the major marketing details for the current patron.



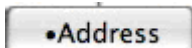
The **Profile** tab displays the personal profile of the current patron.



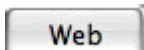
The **Household Patrons** displays the patron's within the household.



The **Contact Info** tab displays the patrons contact details.



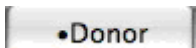
The **Address** tab displays the patrons address information.



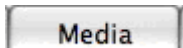
The **Web** tab displays a brief overview of the patrons internet sales history.



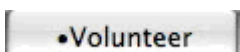
The **Patron** tab details basic account information including how much money they owe and the last time they purchased tickets.



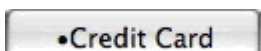
The **Donor** tab displays the patron's total donations and the last year of activity..



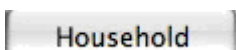
The **Media** tab displays members of the media and their status.



The **Volunteer** tab displays information about a patron volunteering or working for the company.



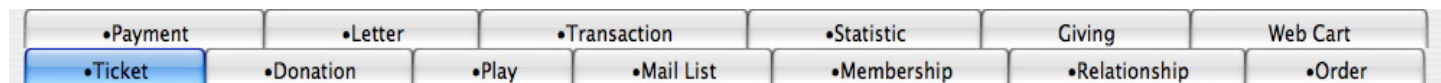
The **Credit Card** tab displays all credit cards on file for a patron. This tab is visible to employees with access.



The **Household** tab displays account information for all members of the household.

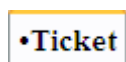


## Patron Account Tabs

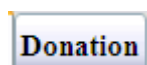


Clicking on a tab will turn the tab blue. If the tab is blue, the Tickets Tab for instance, then that tab is currently selected and its contents display in the window below.

In some instances, one of the tabs may have a bullet prior to its name. The bullet lets the user know that there is information stored in the tabbed field. For example, the Transactions Tab in the above picture has a bullet prior to its name meaning there is information contained in that section.



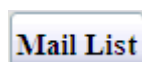
The tickets tab shows a summary of all tickets bought by the patron. They may be shown by different types and years using the pull down bar in the bottom left corner.



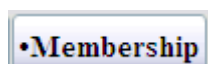
This tab is used to purchase and view all donations belonging to a patron.



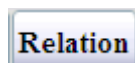
The Plays Tab is used to keep track of which events a patron has shown interest in.



This tab is used to view all of the mail lists that a patron belongs to. It is also used to manually add or remove patrons to or from a mail list. You can also access the mail list criteria window from this tab.

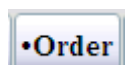


The Member Tab tracks data for memberships, gift certificates and/or event passes for a patron.

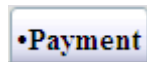


The relationships tab shows the relationships that this patron has with other patrons in the database. Relationships can be categorized and contain personalized notes. The viable columns in the Relationship tab could be any column that is relevant to an organization and its relationship management.

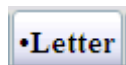
When a relationship is created under the relationship tab an entry is created in the current patron as well as the other patron in the relationship. When a relationship is altered or deleted from one patron's record the same changes will effect the other patron in the relationship.



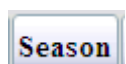
The order tab allows the user to view a summary of all previous purchases the patron has made.



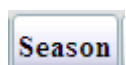
The payment tab allows the user to view a summary of all payments the patron has made toward previous purchases.



This tab is used to keep track of all letters written to a patron. This tab allows a user to attach individual letters to individual patrons and to customize letters that can be attached to individual donations, payments, ticket transactions, or passes.



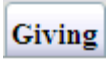
The Transaction Tab displays a listing of transactions that have been created because of the current patron's actions.



This tab keeps track of a patron's season subscription package information.



View Statistics for the selected Patron



This tab is used to view the Donation Giving History for the Patron.



This tab displays the web shopping carts for the selected patron.

Please see the online help for detailed explanations of the above functions.



## Deleting Existing Patron Information

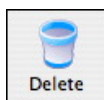
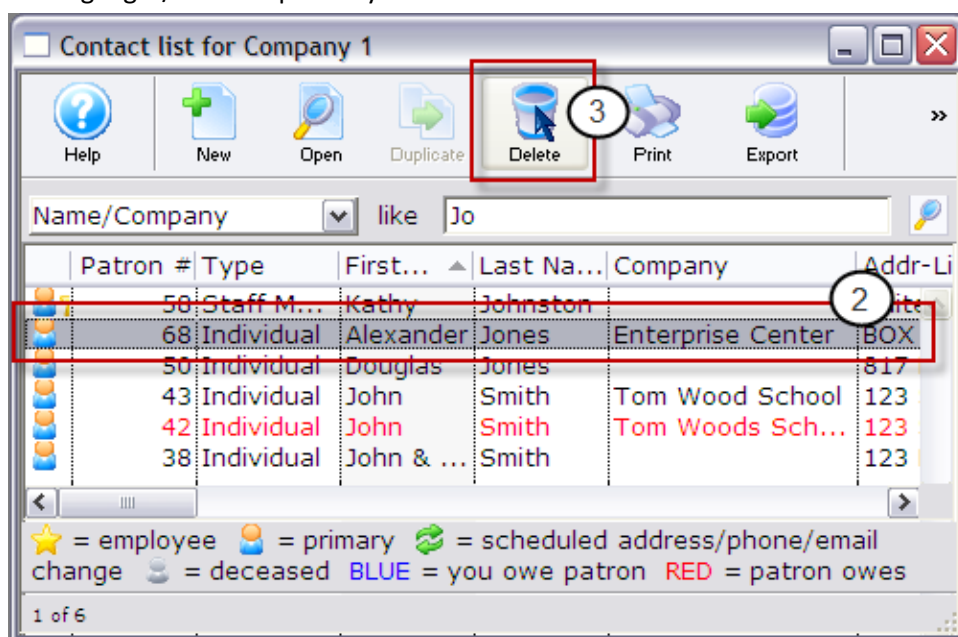


### NOTE:

You can not delete a patron if there is any Financial History attached to the Record.

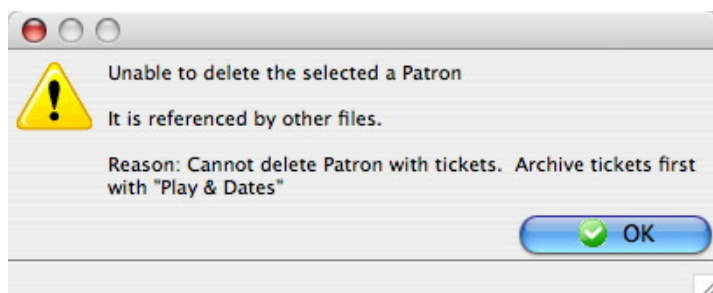
Employee access to deleting records can be controlled when employees are created in Theatre Manager. Please see the online help for detailed information.

1. Find the patron to be deleted in the contact list.
2. Highlight/click the patron you want to remove.

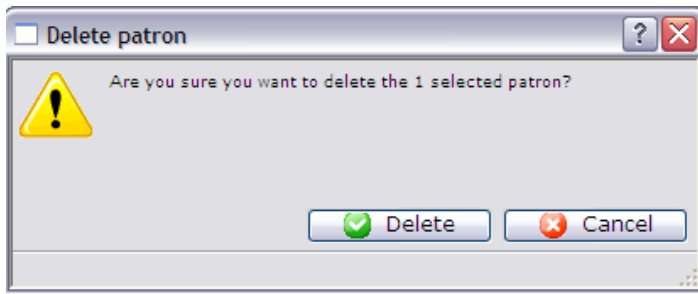



3. Click the **Delete** button.

If the patron record contains financial history the message below will appear.



If the patron record does not contain financial history a confirmation window will appear.



4. Click the **Delete**  button. When the deletion has been successfully completed the patron record and patron number will be removed.



**NOTE:**


That patron number will not be re-assigned to another patron. This number is no longer available for use as it was a unique identifier to that specific patron.

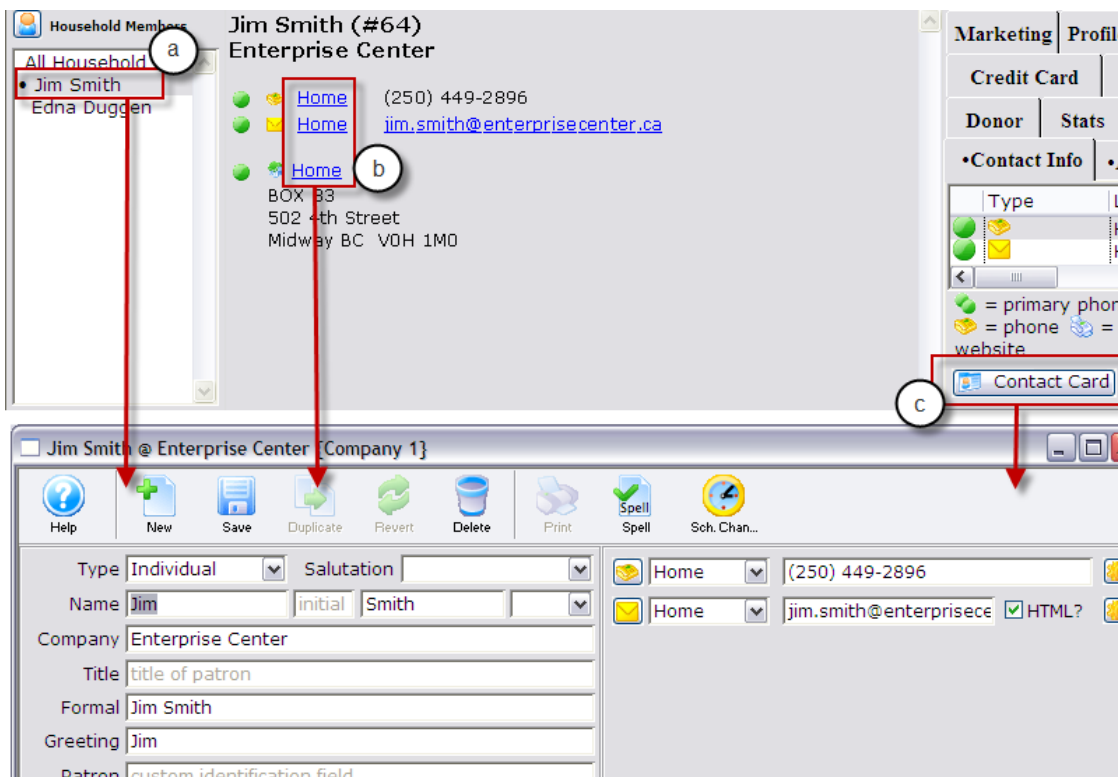
## Patron Contact Card

### Editing Patron Information

Occasionally, you may need to change or add information in a Patron's record (for example: the Patron changes their contact information, gets married, etc.). Changing a patron's information is simple and done through the Contact Card.

Some Patron Data may be marked as mandatory fields within the Company Preferences. These pieces of information must be entered in order to save changes to the contact card. The Contact Card can be access in 2 different ways:

1. From the Contact List ribbon bar, click the Contact Card  button.
2. From inside the patron record you can choose:
  - a. Clicking on the name of a household member.
  - b. Clicking on the hyperlinked title of the Patron's contact information.
  - c. Clicking on the contact Card button on the Contact Info tab.



The screenshot displays the 'Contact Card' for Jim Smith (#64) at Enterprise Center. The top section shows contact details: Home phone (250) 449-2896, Home email jim.smith@enterprisecenter.ca, and Home address (BOX 33, 502 4th Street, Midway BC V0H 1M0). The right sidebar includes tabs for Marketing, Profile, Credit Card, Donor, and Stats, with a 'Contact Info' tab selected. Below this, a legend defines icons for primary phone, phone, and website. A 'Contact Card' button is highlighted in the bottom right. The bottom section is the editing form for Jim Smith, featuring fields for Type (Individual), Salutation, Name (Jim Smith), Company (Enterprise Center), Title (title of patron), Formal (Jim Smith), Greeting (Jim), and Patron (custom identification field). A toolbar with icons for Help, New, Save, Duplicate, Revert, Delete, Print, Spell, and Sch. Chan... is located above the form.

## Parts of the Contact Window

**Contact Card ribbon bar**

**Patron Details**

**Patron Address Information**

**Patron Contact Information**

Mr. & Mrs. Jim Smith @ Enterprise Center {Company 1}

Type: Individual Salutation: Mr. & Mrs.

Name: Jim initial: Smith

Company: Enterprise Center

Title: title of patron

Formal: Jim Smith

Greeting: Jim

Patron: custom identification field

**Home** Home

Location: Home Primary

Address: BOX 33

502 4th Street

City: Midway Province: BC

Country: Canada Postal Code: V0H 1M0

Home: (250) 449-2875

Home: jim.smith@enterprisecenter.ca HTML?

+ Add... - Remove...

## Ribbon Bar



	Help	Opens the online Theatre Manager Help <a href="http://www.theatremanagerhelp.com/theatre-manager-help/theatre-manager-help">http://www.theatremanagerhelp.com/theatre-manager-help/theatre-manager-help</a>
	New	Creates a new Contact and/or Household member associated with the record for the selected patron
	Save	Saves the changes/additions made in the Contact Card.
	Revert	Discards any changes that you have made to the record up to the last time the record was "saved".
	Delete	Deletes the record.
	Print	Prints the current record/
	Spell Check	Opens the Spell Checker dialog.
	Schedule Change	Opens the Address and Contact Change Schedule for the selected patron.


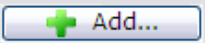
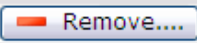
## Patron Details

Type	Individual	Salutation	Mr. & Mrs.
Name	Jim	initial	Smith
Company	Enterprise Center		
Title	title of patron		
Formal	Jim Smith		
Greeting	Jim		
Patron	custom identification field		

The field definitions are as follows:

<b>Type</b>	The type of patron record that is being entered.
<b>Salutation</b>	Formal salutation for the patron.
<b>Name Fields</b>	First, middle initial and last name of the patron
<b>Suffix</b>	Suffix for the patron if applicable.
<b>Company</b>	Company the patron works for.
<b>Title</b>	Title within the company the patron works for.




## Address Details

Home Home	
Location	Home Primary 
Address	BOX 33
	502 4th Street
City	Midway
Province	BC
Country	Canada
Postal Code	V0H 1M0
 Add...  Remove....	

You can enter as many different address locations as needed. Location types can be customized to meet needs. Some address information may be marked as mandatory fields within the Company Preferences. These pieces of information must be entered in order to save changes to the contact card.




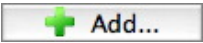
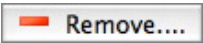
- For information on how to edit mandatory information, see the online help.

The field definitions are as follows:


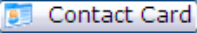
<b>Location</b>	Location of the patrons address.
<b>Action Button</b> 	<p>The Action button gives you access to several other related functions. In the address location these are:</p> <ul style="list-style-type: none"> <li>• Set primary address</li> <li>• Remove now</li> <li>• Schedule a future <ul style="list-style-type: none"> <li>• Primary address change</li> <li>• Recurring primary address change</li> <li>• Address removal</li> </ul> </li> <li>• Copy the Patron name and address to the clipboard</li> <li>• Map of the patron's address using MapQuest</li> <li>• Weather at Patron Address.</li> </ul>
<b>Address</b>	Address of the location. There are two address lines available for more complex addresses.
<b>City</b>	The city or town for the address provided. To assist in quickly adding a patron, a default city can be displayed when adding new patrons.
<b>Province/State</b>	<p>The province or state where the city is located. To assist in quickly adding a patron, a default province or state can be displayed when adding new patrons using the Data Edits Tab in Default Data.</p> <p>You can customize this screen to display either "Province" or "State"</p>
<b>Country</b>	The country where the province or state is located. To assist in quickly adding a patron, a default country can be displayed when adding new patrons using the Data Edits Tab in Default Data.
<b>Postal Code/Zip Code</b>	This field records the patron's postal identification number. Postal codes format automatically to capital letters. Zip codes format automatically to add hyphens when 9 numbers are entered. You will receive a warning if numbers or letters are entered incorrectly. The screen is able to display either 'Postal Code' or 'Zip Code'. The tab name "Postal Code" or "Zip Code" may be renamed in the Appearance section of Setup.
 Add...   Remove....	<p>Adds a new location to the address Details.</p> <ul style="list-style-type: none"> <li>• <b>For more information on Adding an Address, see page 24</b></li> </ul> <p>Removes a location from the address details.</p> <ul style="list-style-type: none"> <li>• <b>For more information on Removing an Address, see page 25</b></li> </ul>

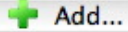

## Contact Details

There can be as many lines of contact information within the contact area as are needed. Location types can be customized to meet needs.

<b>Type</b>  	Displayed as icons. Indicates the type of contact information for the patron.
<b>Location</b>	Location of the contact.
<b>Contact</b>	Contact information for the patron.
<b>Action Button</b> 	The Action button gives you access to several other related functions.
 	<p>Adds a new Contact Type.</p> <ul style="list-style-type: none"> <li>• <b>For more information on Adding Contact Information, see page 26</b></li> </ul> <p>Removes a Contact Type.</p> <ul style="list-style-type: none"> <li>• <b>For more information on Removing Contact Information, see page 27</b></li> </ul>

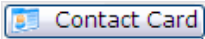
## Adding an Address

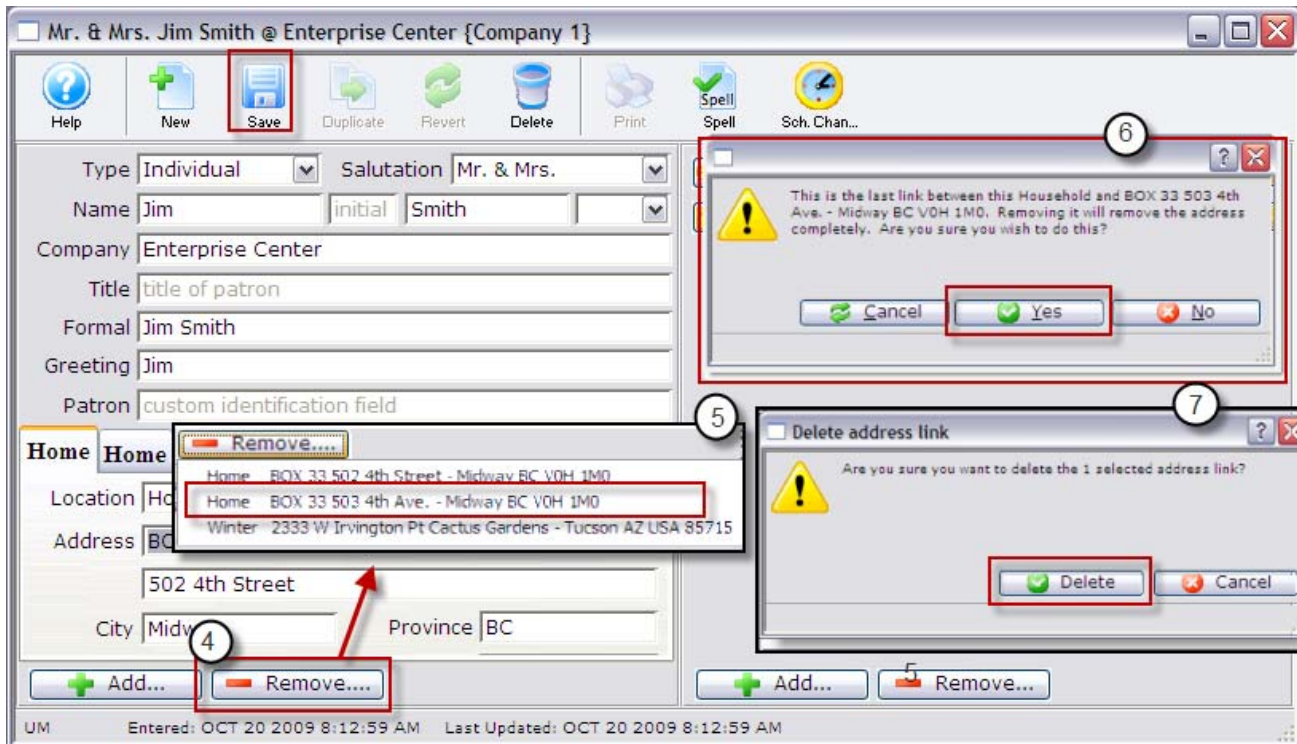
1. Open the Patron Window.
2. Click the **Address**  tab in the patron window and click the **Contact Card**  button.
3. The contact card opens.

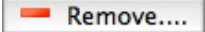

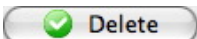
4. Click the **Add**  button in the lower left corner.
5. An address location drop down opens. Select the new address location.
6. Enter the new address information.
7. Click the **Save**  button.
8. The new address is now added to the contact card.



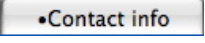
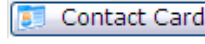
## Removing an Address

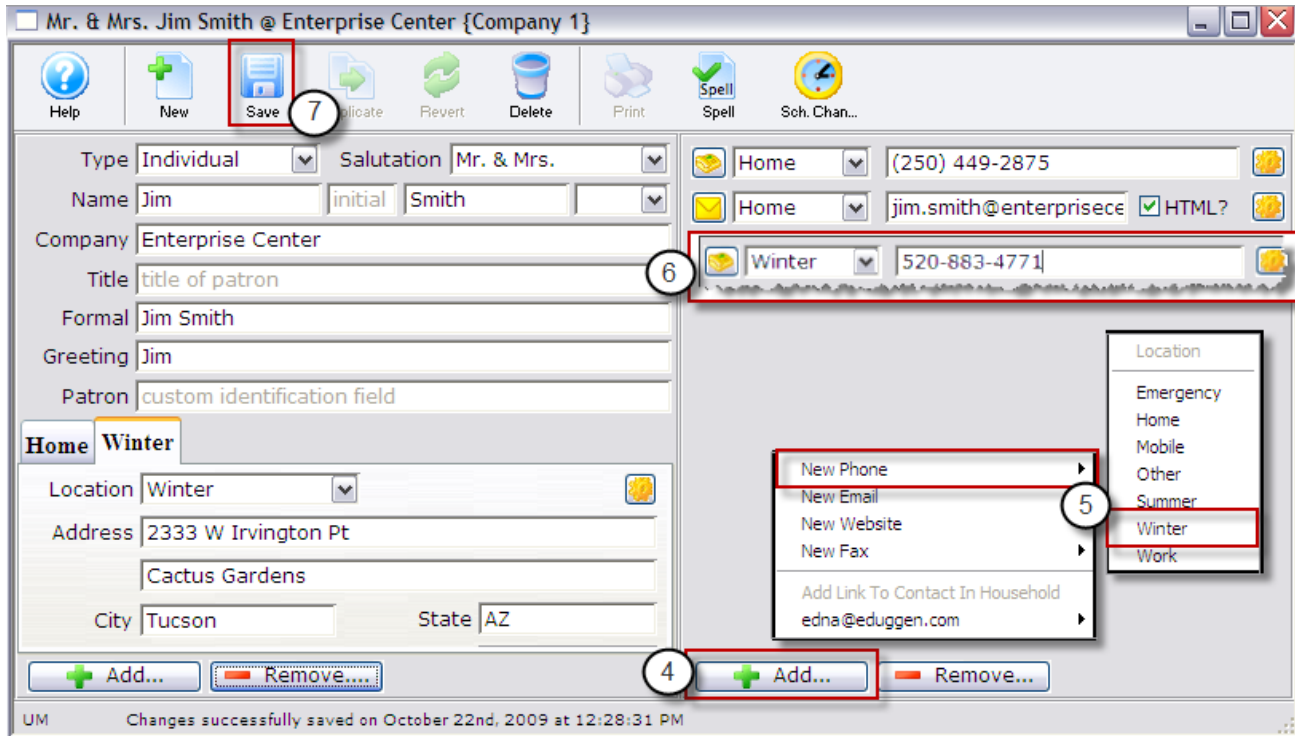
1. Open the Patron Window.
2. Click the Address **Address** tab in the patron window and click the **Contact Card**  button.
3. The contact card opens.



4. Click the **Remove**  button in the lower left corner.
5. An address location drop down opens. Select the address you want to remove.
6. A confirmation to delete the selected address window opens. Click the **Yes**  button.
7. A second confirmation opens. Click the **Delete**  button. The address information is now removed from the contact card.

## Adding Contact Information

1. Open the Patron Window.
2. Click the **Contact Info**  in the patron window.
3. Click the **Contact Card**  button. The contact card window opens.



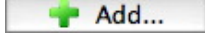

Mr. & Mrs. Jim Smith @ Enterprise Center {Company 1}

Help New **Save** Duplicate Revert Delete Print Spell Spell Sch. Chan...

Type Individual Salutation Mr. & Mrs. Home (250) 449-2875  
Name Jim initial Smith Home jim.smith@enterprisece HTML?  
Company Enterprise Center  
Title title of patron  
Formal Jim Smith  
Greeting Jim  
Patron custom identification field  
Home Winter  
Location Winter  
Address 2333 W Irvington Pt  
Cactus Gardens  
City Tucson State AZ  
+ Add... - Remove...  
UM Changes successfully saved on October 22nd, 2009 at 12:28:31 PM

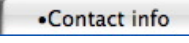

Location  
Emergency  
Home  
Mobile  
Other  
Summer  
Winter  
Work

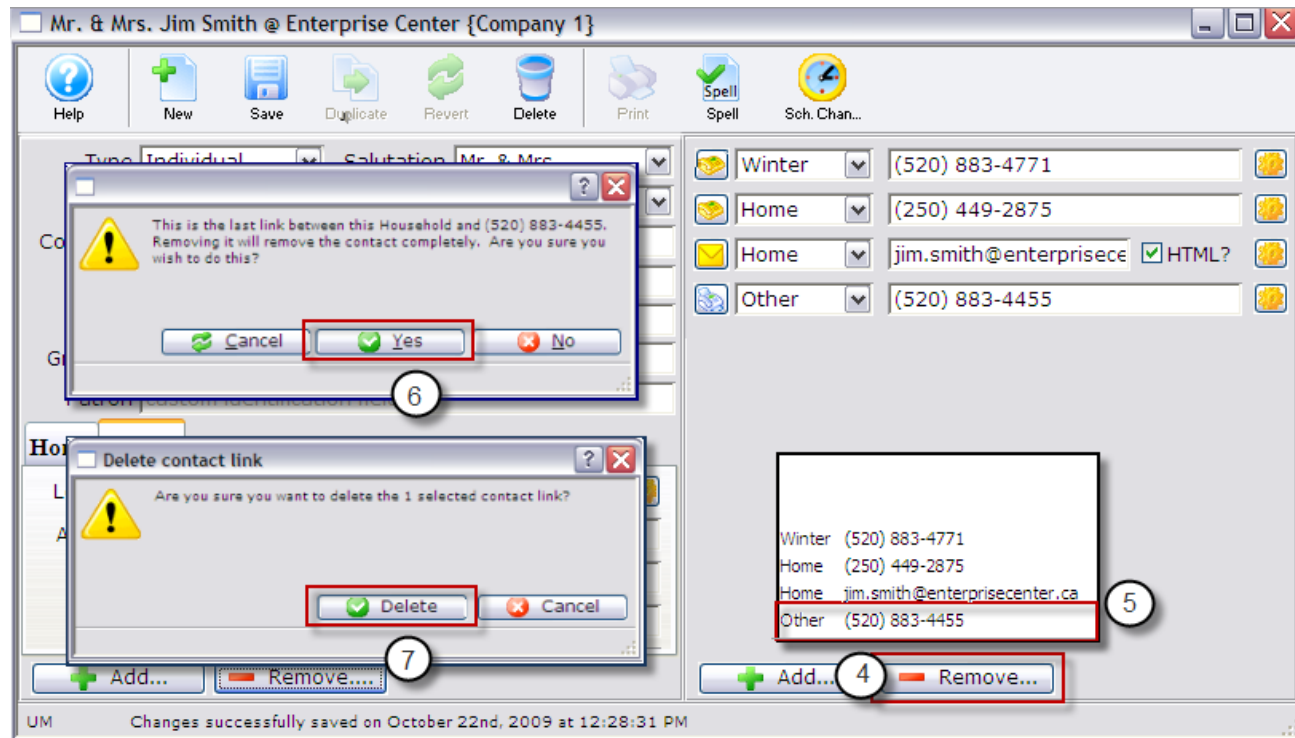
New Phone  
New Email  
New Website  
New Fax  
Add Link To Contact In Household  
edna@eduggen.com

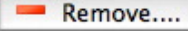

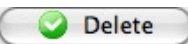
4. Click the **Add**  button below the contact details.
5. A contact location drop down will appear. Select the new contact type and location.
6. Enter the new contact information.
7. Click the **Save**  button.

The new contact information is now added to the contact card.

## Removing Contact Information

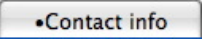
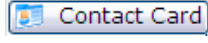

1. Open the Patron Window.
2. Click the **Contact Info**  in the patron window.
3. Click the **Contact Card**  button. The contact card window opens.

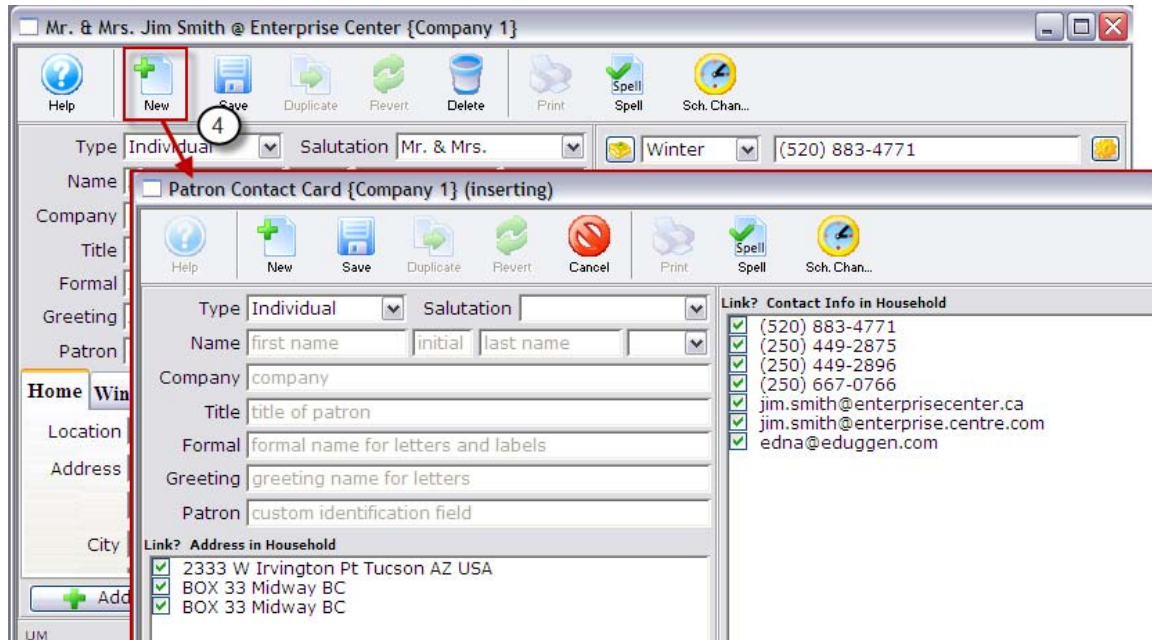


4. Click the **Remove**  button below the contact details.
5. Select the contact information to remove.
6. A confirmation to delete the selected address window opens. Click the **Yes**  button.
7. A second confirmation opens. Click the **Delete**  button. The address information is now removed from the contact card.

## Adding a Patron Using the Contact Card

Patrons can be added through the contact card to an existing Patron Household. This allows you to associate address and contact information quickly and easily. The new patron added will have their own Patron Number.

1. Open the Patron Window.
2. Click the **Contact Info**  in the patron window.
3. Click the **Contact Card**  button. The contact card window opens.
4. Click the **New**  button. The Patron Contact Card (Inserting) dialog opens.



5. Enter the information for the new patron to be associated with the existing Patron Household, enabling and disabling the links to the Address in Household and Contact Info in Household as necessary.

James Smith Jr. @ City of Greenwood {Company 1} (inserting)

Help New Save Duplicate Revert Cancel Print Spell Sch. Chan...

Type Individual Salutation

Name James initial Smith Jr.

Company City of Greenwood

Title title of patron

Formal James Smith, Jr.

Greeting James

Patron custom identification field

Link? Address in Household

2333 W Irvington Pt Tucson AZ USA

BOX 33 Midway BC

BOX 33 Midway BC

Link? Contact Info in Household

(520) 883-4771

(250) 449-2875

(250) 449-2896

(250) 667-0766

jim.smith@enterprisecenter.ca

jim.smith@enterprise.centre.com

edna@eduggen.com

Next

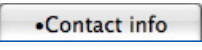
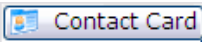

Note: Formal name changed from James Smith to James Smith, Jr. automatically for you.

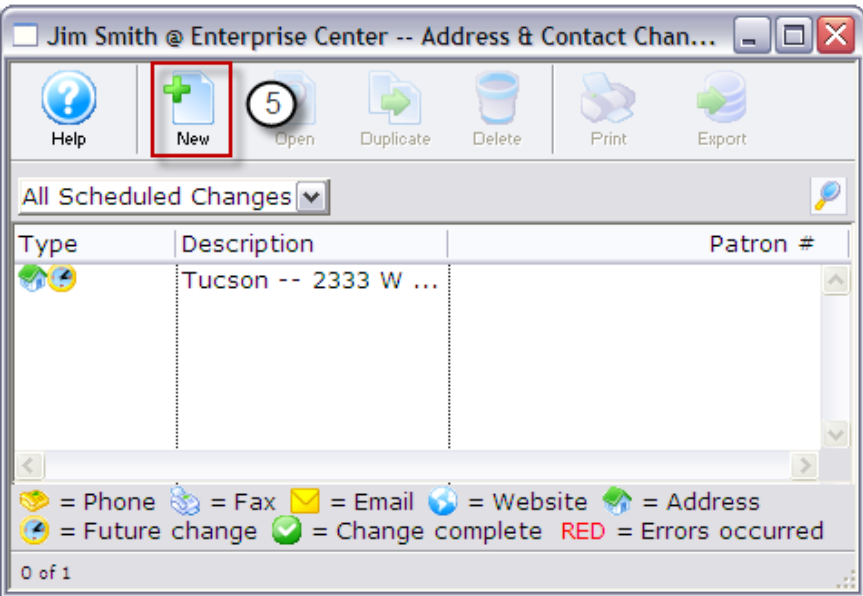
6. Click the **Next** button. The Contact Card for the new Patron opens.


# Schedule Changes to the Contact Card

With scheduling, you can change a Patron’s contact and/or address information, in particular, the time at which it is planned these events will take place. This feature includes:

Function	Example
The ability to schedule the removal of a phone, fax, email, website or address	The Patron is moving away from your area.
The ability to schedule setting the primary phone, fax, email, website or address as a one-time occurrence	The Patron is moving within your area.
The ability to schedule setting the primary phone, fax, email, website or address as a recurring item on a given day every year	The Patron has a summer or winter residence and wishes to continue to receive information/

- 1. Open the Patron Window.
- 2. Click the **Contact Info**  in the patron window.
- 3. Click the **Contact Card**  button. The contact card window opens.
- 4. Click the **Schedule Changes**  button. The Patron Contact Card (Inserting) dialog opens.



- 5. Click the **New**  button. The address or contact change for the Patron window opens. The window consists of four parts.
- 6. In **Part 1**, choose the action for the address.

Scheduled contact changes allow a phone, fax, e-mail, website or address to be changed on a specific date. The change can either be the removal of the contact or changing it to be primary. Primary changes can be a one-time event or a recurring change, such as when a patron has a summer and winter home.

1

Action to perform for address

- ☐ Remove
- ☒ Set Primary
- ☐ Set Primary (Recurring)

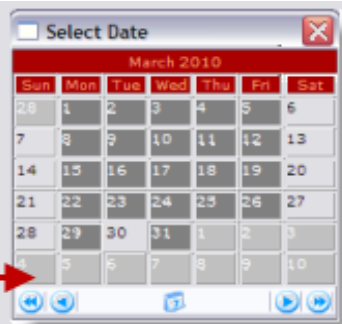
Outlet: Company 1

7. In **Part 2**, enter the date (or select from the calendar) the date the change is to take place.

2

Set address to primary on

MAR 30 2010



8. In **Part 3**, you can choose to apply the change to the Household or a single Patron within the Household.

3

Applies to:

☒ Household

☐ Add item to patron when not on patron record.

☐ Patron

• Jim Smith (#64)

9. In **Part 4** you can select the specific address or contact information that is to be affected by the schedule.

4

Assign which item will be set

- |   |   |
|---|---|
| <input checked="" type="radio"/> BOX 33<br>502 4th Street<br>Midway BC V0H 1M0        | <input type="radio"/> (250) 449-2875                  |
| <input type="radio"/> 2333 W Irvington Pt<br>Cactus Gardens<br>Tucson AZ 85715<br>USA | <input type="radio"/> (520) 883-4771                  |
| <input type="radio"/> BOX 33<br>502 4th Ave. Sw.<br>Midway BC V0H 1M0                 | <input type="radio"/> (250) 449-2896                  |
|   | <input type="radio"/> (250) 667-0766                  |
|   | <input type="radio"/> edna@eduggen.com                |
|   | <input type="radio"/> jim.smith@enterprisecenter.ca   |
|   | <input type="radio"/> jim.smith@enterprise.centre.com |



Save

10. Click the **Save** button to add the scheduled change. You can now close the Address or contact change window or add more changes to the Patron or Household.

Help New **Save** Duplicate 10 Alert Cancel Print Spell

Scheduled contact changes allow a phone, fax, e-mail, website or address to be changed on a specific date. The change can either be the removal of the contact or changing it to be primary. Primary changes can be a one-time event or a recurring change, such as when a patron has a summer and winter home.

**1** Action to perform for address

☐ Remove

☒ Set Primary **6**

☐ Set Primary (Recurring)

**2** Set address to primary on

MAR 30 2010 **7**

**3** Applies to:

☒ Household **8**

☐ Add item to patron when not on patron record.

☐ Patron

• Jim Smith (#64)

**4** Assign which item will be set **9**

☒ BOX 33  
502 4th Street  
Midway BC V0H 1M0

☐ 2333 W Irvington Pt  
Cactus Gardens  
Tucson AZ 85715  
USA

☐ BOX 33  
502 4th Ave. Sw.  
Midway BC V0H 1M0

☐ (250) 449-2875

☐ (520) 883-4771

☐ (250) 449-2896

☐ (250) 667-0766

☐ edna@eduggen.com

☐ jim.smith@enterprisecenter.ca

☐ jim.smith@enterprise.centre.cor

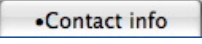
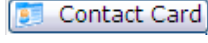

**Select Date**

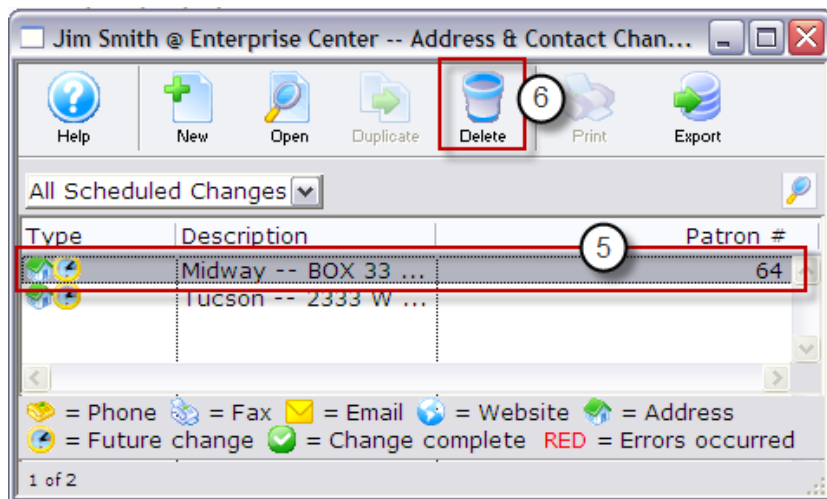
March 2010


Sun	Mon	Tue	Wed	Thu	Fri	Sat
28	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31	1	2	3
4	5	6	7	8	9	10

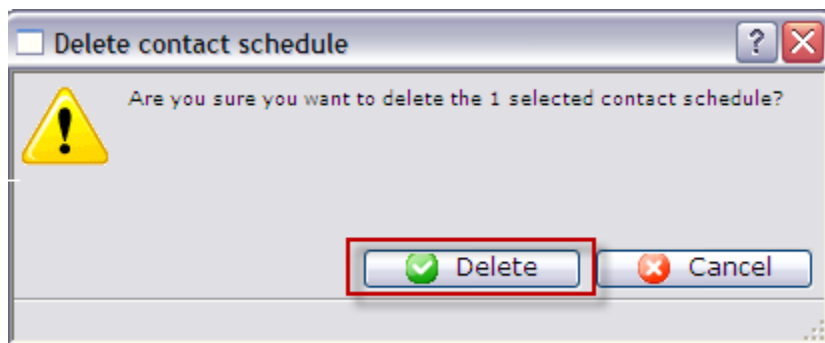


## Delete a Scheduled Change

1. Open the Patron Window.
2. Click the **Contact Info**  in the patron window.
3. Click the **Contact Card**  button. The contact card window opens.
4. Click the **Schedule Changes**  button. The Patron Address and Contact Change window opens.



5. Highlight the line of the Change you want to delete.
6. Click the **Delete**  button. The Delete contact schedule confirmation dialog opens.



The Change has been deleted.

## Merging Patrons

Theatre Manager is designed to keep all information about a patron on one record. If a user duplicates a record by mistake, the duplicate records may be combined. Merging patron records will combine the detail information stored in two separate records into one of the original records. Because merging is such a powerful task, it is recommended that this function be limited to specific individuals within your team. The process of merging is actually two tasks:

1. Finding the duplicate records
2. Combining the duplicates into a single Patron.

Searching and Merging is particularly important when Patrons have the opportunity to buy tickets online. If tickets have been sold to each of the duplicate patrons, the merged patron will now have all the ticket purchases. As well, donation, personnel, media, and membership information are similarly combined.

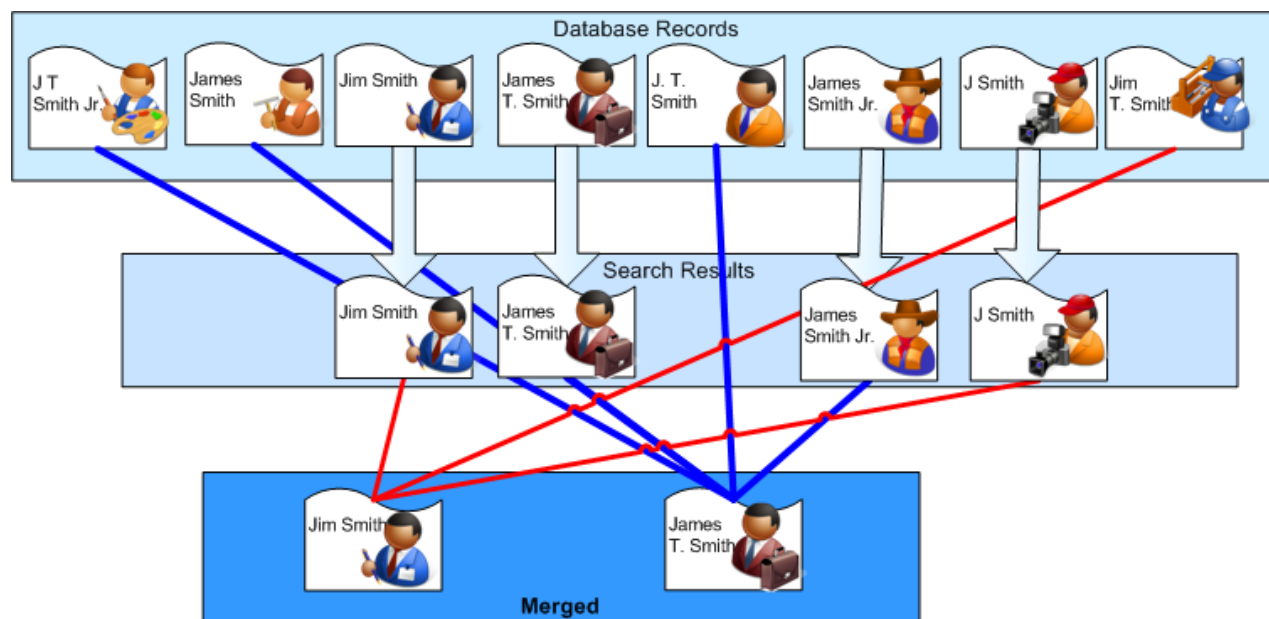
For example, Jim Smith purchases some tickets online, and enters his work address, telephone number and email, as he will be using the receipt for his expense account. However, when Jim enters this information into the on-line system, he has added himself as a new patron. This can be troublesome for both Jim and you.

To keep accurate patron records, you periodically check and merge these duplicate patron records.



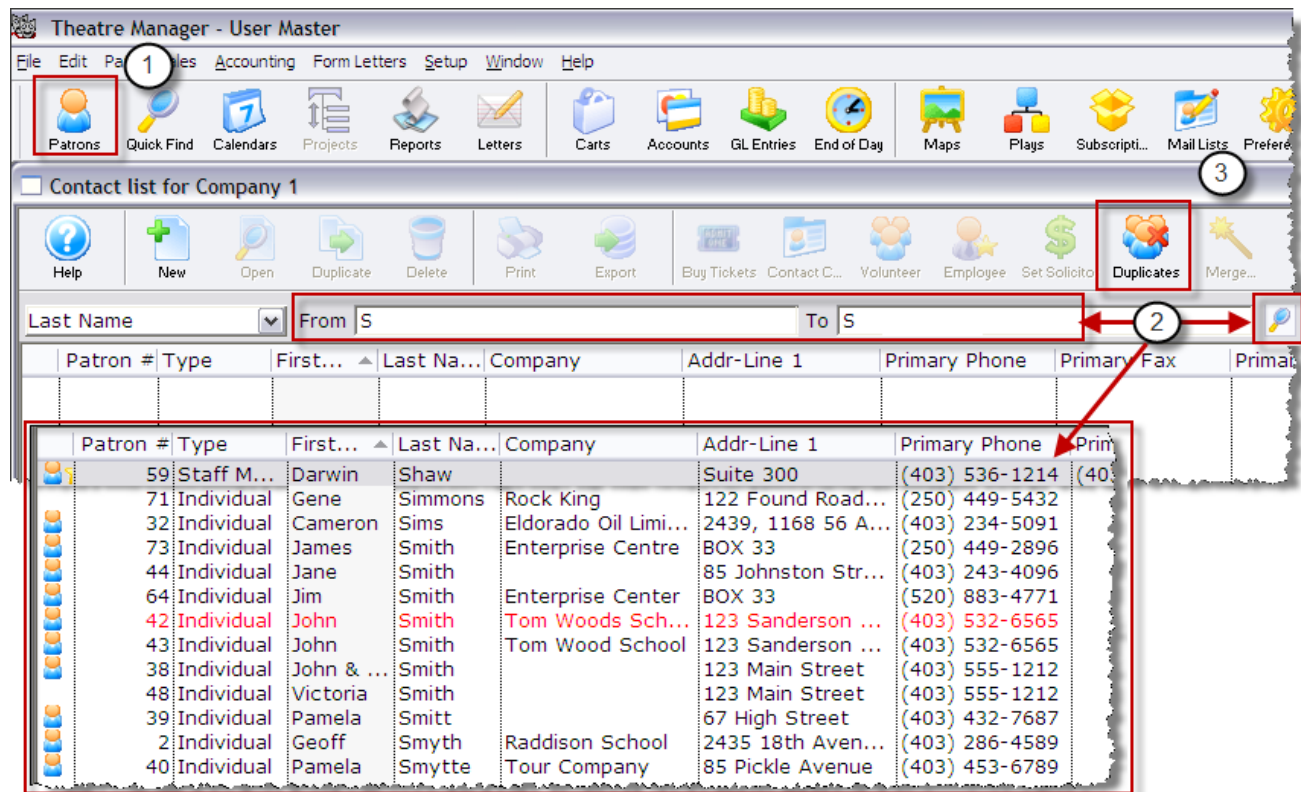
Be very careful when using the Merge feature. Even though all the information about the individuals appears to be the same, there is still a possibility (if you have very little information about them) that the records may not be the same. Once merged, the Patron records CANNOT be unmerged.




Double check!

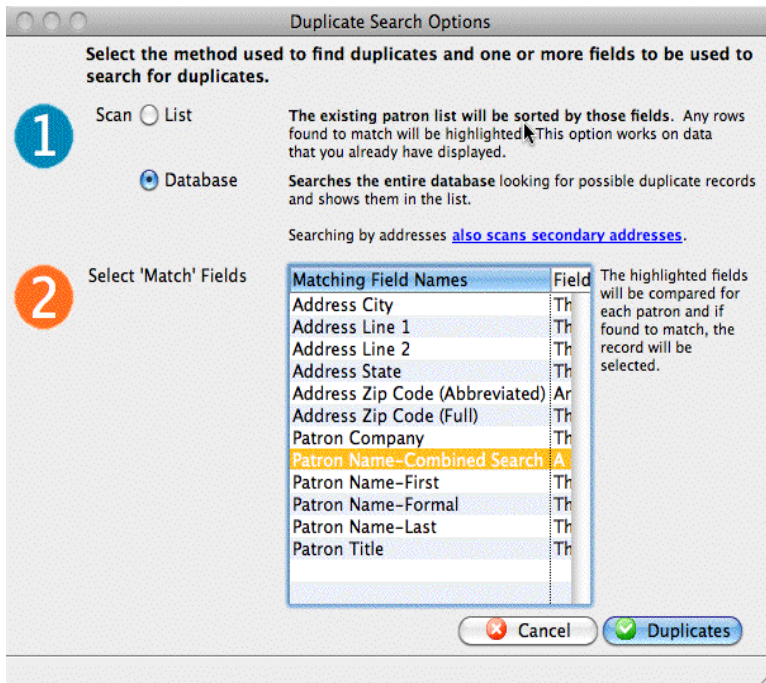


As you can see by the above graphic, you must carefully consider each patron before merging them.

## Finding Duplicate Records



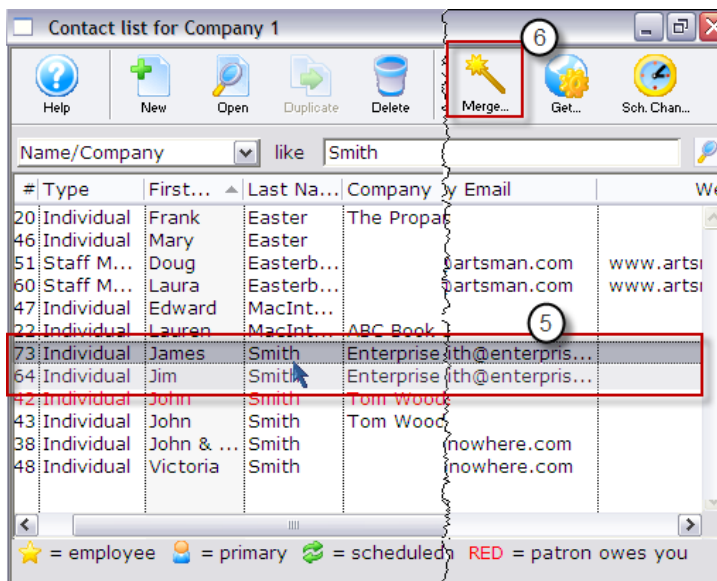
1. From the main window, click the **Patrons**  button. The Contact List opens.
2. Enter the search criteria to locate duplicate Patrons and click the **Search**  button. The Patrons matching the search are displayed.
3. Click the **Duplicates**  button. The **Duplicate Search Options** window opens.



4. From this window, you can choose to search by the:

- List –this list is made up of the search criteria displayed in the Contact List dialog, or
- Database—this will search the entire database looking for any possible duplicates and then display them in the list.

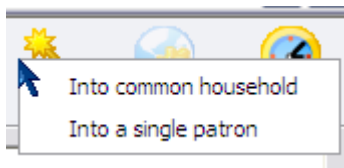
For example, Jim Smith's partner has a different last name, but shares the same address, telephone and contact information, you may want to merge them into the same household.



As you can see, Jim Smith has been added as James Smith through on-line ticket purchase, there are now two Patrons to be merged into a single Patron record.

5. Once you have identified your duplicates, highlight them.

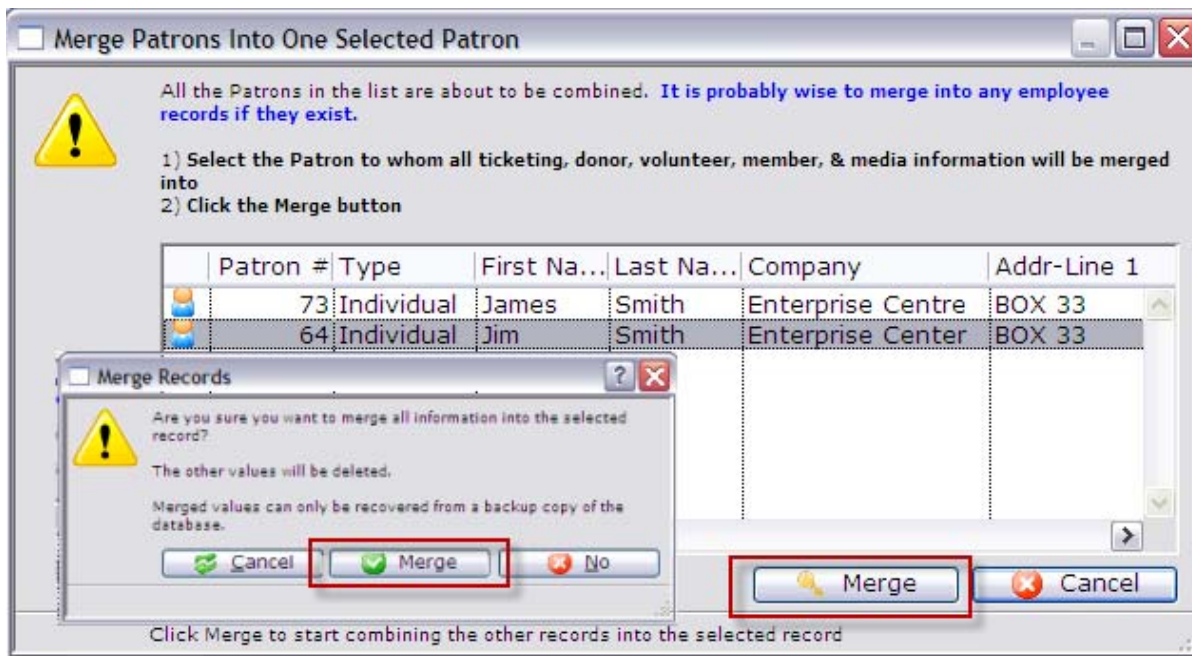
6. Click the **Merge**  button.

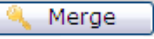
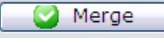


The Merge button gives you the option of combining the highlighted patrons:

- a. Into a common household (for example you searched for the same address and are merging patrons into a household record) or
- b. Into a single patron.

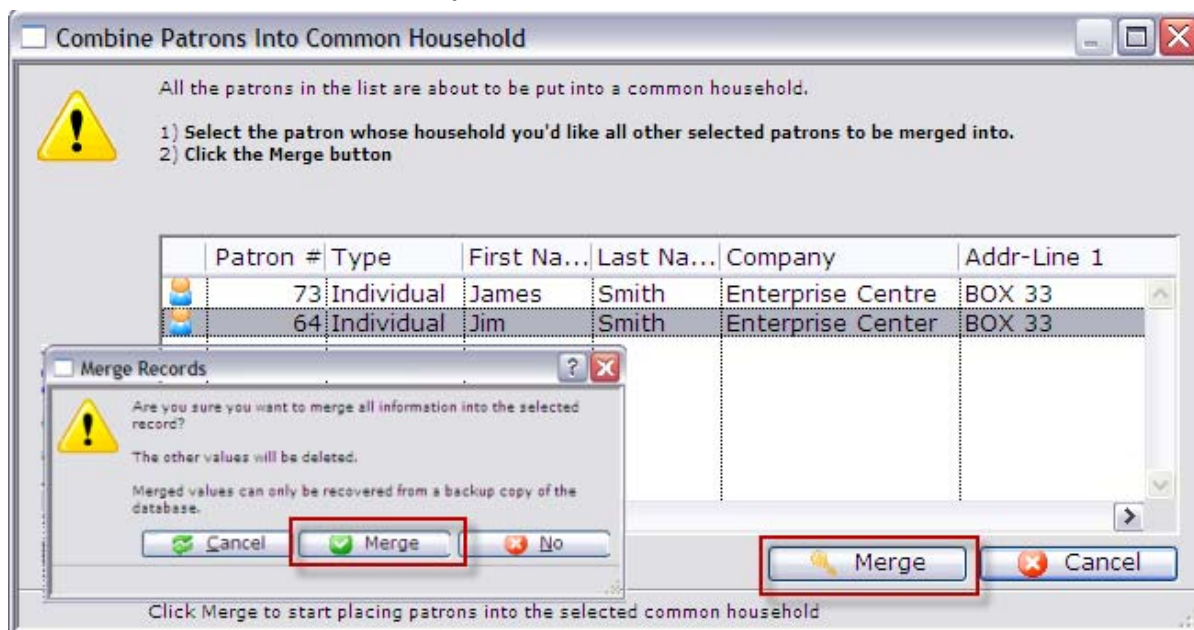
**7a. You choose combining the selected patrons into a common household.**

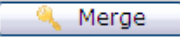
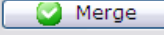


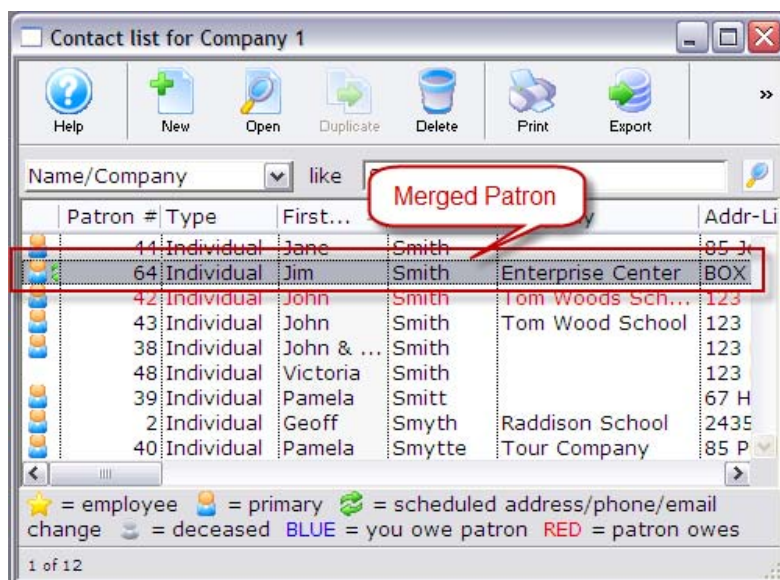
1. Select the Patron to remain and Click the **Merge**  button. The Merge Records dialog opens.
2. The dialog asks you to confirm your choice. Click the **Merge**  button. You are returned to the Contact List window and the Primary patron remains.



**7b. You choose to combine the selected patrons into a Selected Patron.**



1. Select the Patron to remain and Click the **Merge**  button. The Merge Records dialog opens.
2. The dialog asks you to confirm your choice. Click the **Merge**  button. You are returned to the Contact List window and the Primary patron remains.



In our example, there is now a single patron record for Jim Smith, containing the data added and tickets purchased with the other Patron number.

This makes both your and the Patron's record keeping easier.