

**Theatre Manager's
Buying a Ticket
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:

barb@artsman.com

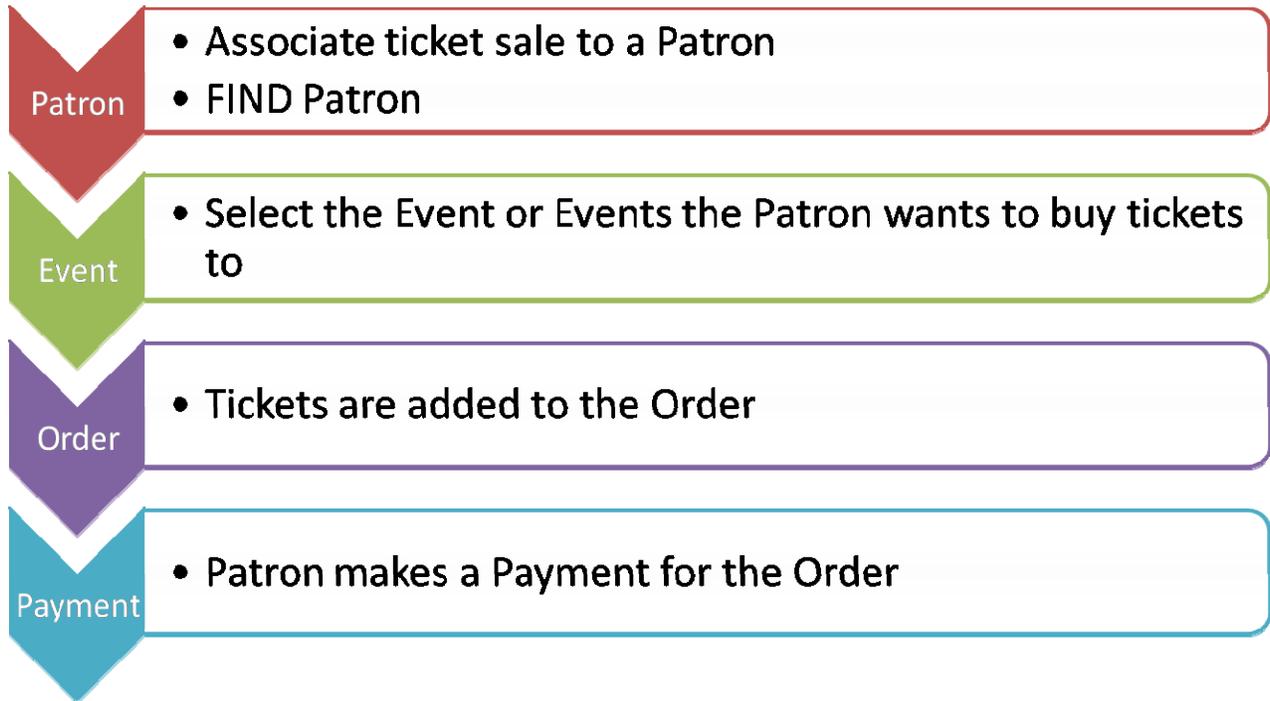
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Ticket Management

Introduction to Ticket Sales

Selling a ticket consists of four parts. These are:

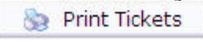


Ticket sales are associated to a Patron's record.

Although there is much more to the process around tickets—for example: exchanging, refunding, adding to orders, etc. all actions can be broken down into these four steps.

The following page steps you through the basic process and following are some of the different variations of the process.

Selling a Ticket Cheat 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><input type="text" value="Name/Company"/> like <input type="text" value="Hu"/></p> <p>3. The Contact List window displays the patrons matching your entry.</p>	<p>For more information, see the online help: http://www.theatremanagerhelp.com/finding-patron-contacts-list-window</p>
	<p>4. Highlight the Patron you want to buy tickets for and click the Buy Tickets  button. The Order window opens.</p> <p>5. In the Performance Selection tab, select the event from the event list. Several events can be chosen at the same time.</p> <p>6. Click the Seat Selection  button.</p>	
	<p>7. The Seat Selection window opens with the performance you have selected appearing in the event portion of the window.</p> <p>8. If required, choose the Promo Code. The Promo code specifies if there are discounts for children, youth or seniors.</p> <p>9. Select the seats in the Theatre Seats Graphic by clicking them. Seats that have previously been sold are marked.</p> <p>10. 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>11. Click the Payment  button.</p>	
	<p>1. Choose the Payment Method from the drop down list.</p> <p>2. Once you have selected the payment method, enter the details.</p> <p>3. 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.</p>	

Step 1—Find a Patron

To find the Patron:



1. Click the **Patrons** 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.
 - a. Type the last name into the "From" field.
 - b. Click the **Search** button or hit enter.
2. The results of the search appear in the **Contact List**. 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](#).

Step 2—Select Events

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.



The Order window opens to the **Tickets>Performance Selection** tab.

5. In the Performance listing, choose the appropriate event from the event list. Several events can be selected at the same time.

Step 3—Tickets are Added to Order

To add tickets to the selected order:

- Click the **Seat Selection** tab.

Seq #	Promotion	Disc %
21	Adult	0.00%
22	Child	10.00%
25	Student	5.00%

C..	Description	Price	Amount
1	Price Code 1	\$40.00	\$40.00
2	Price Code 2	\$35.00	\$35.00
3	Price Code 3	\$30.00	\$30.00
A	Price Code A	\$0.00	\$0.00
B	Price Code B	\$0.00	\$0.00
C	Price Code C	\$0.00	\$0.00

Play	Performance	Qty	Pc	Section	Row #	Seat #	Total Cost	Promotion
08-SM	2-FRI	1	1	Floor Left	AA	1	\$40.00	Adult
08-SM	2-FRI	1	1	Floor Left	AA	2	\$40.00	Adult
08-SM	2-FRI	1	1	Floor Left	AA	3	\$40.00	Adult
08-SM	2-FRI	1	1	Floor Left	AA	4	\$40.00	Adult

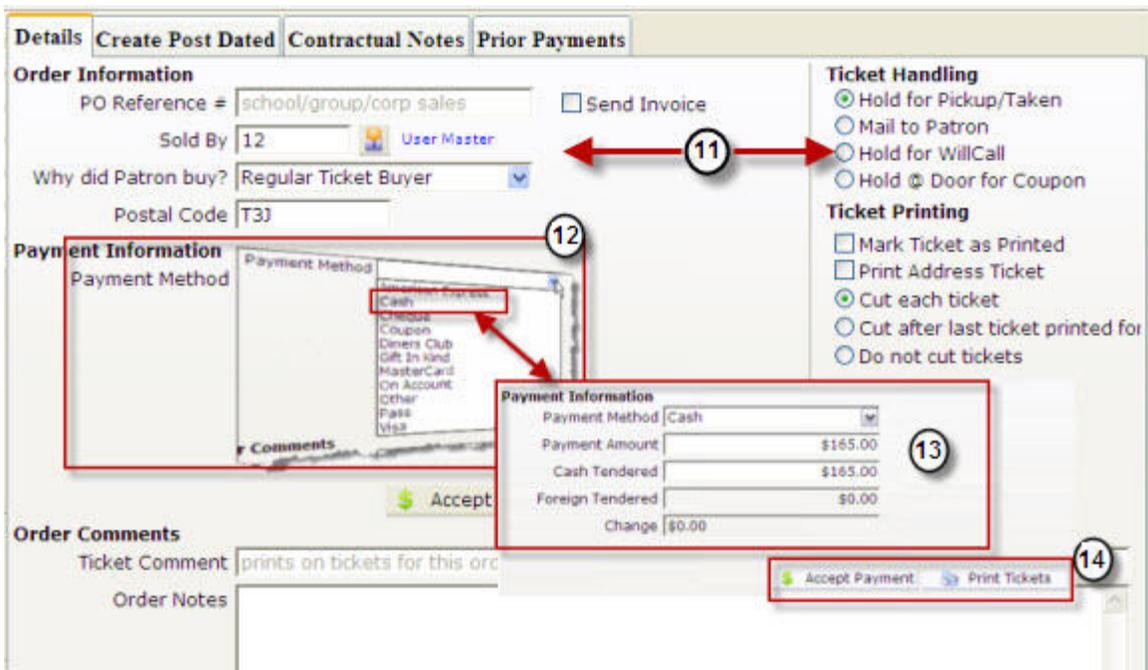
Ticket Price	\$160.00
Discounts	\$0.00
Ticket Fee 1	\$0.00
Ticket Fee 2	\$0.00
Ticket Fee 3	\$0.00
Ticket Total	\$160.00
Order Fees	\$5.00
Donation	\$0.00
Membership	\$0.00
City Tax	\$0.00
State/PST	\$0.00
Federal/GST	\$0.00
Order Total	\$165.00
Currency	\$0.00
Prior	\$0.00
Futura	\$0.00
Balance Due	\$165.00
Commission	\$4.00

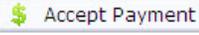
- The Seat Selection window opens. The performance you have chosen appears in the Event portion of the window.
- If required, choose the Promo Code—in this example, all of the seats are adult.
- In the Theatre graphic, pick the seats the patron wants. As seats are selected they appear in the seats portion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

To create the payment:

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



11. 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.
12. Choose the Payment Method from the drop down list.
13. 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.
14. 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
	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.

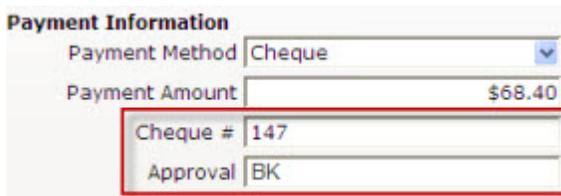
Payment Method	Cash
Payment Amount	\$23.40
Cash Tendered	\$0.00 CAD
USD Tendered	\$25.00 USD @ 1.060000
Change	\$3.10 CAD

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 two input fields: 'Cheque #' with the value '147' and 'Approval' with the value 'BK'. A red rectangular box highlights these two 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.

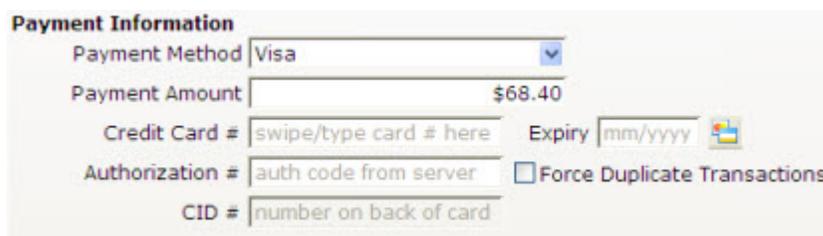
Enter the Cheque number.

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 four 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 'CID #' with the placeholder 'number on back of card'. There is also a checkbox labeled 'Force Duplicate Transactions' which is currently unchecked.

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

The screenshot shows a 'Payment Information' window. The 'Payment Method' dropdown is set to 'Other'. The 'Payment Amount' is displayed as '\$68.40'. Below this, there are two text input fields: 'Other' with the placeholder text 'card/id # if required' and 'Approval' with the placeholder text 'approval # if required'. A red rectangular box highlights these two input fields.

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

The screenshot shows a 'Payment Information' window. The 'Payment Method' dropdown is set to 'On Account'. At the bottom of the window, there are two buttons: 'Accept Payment' (with a green dollar sign icon) and 'Print Tickets' (with a printer icon).

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

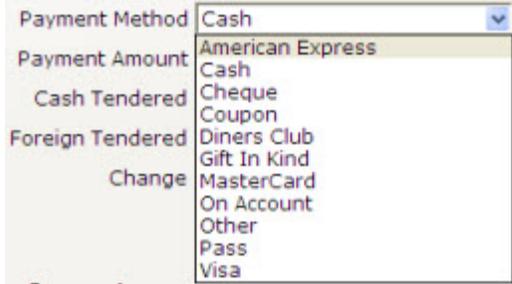
No payment will be received at this time, so the amount due on the order will be placed as an outstanding balance due on the patron's account.

Payment Details Tab Fields

a. Order Reference	
PO Reference #	Enter a purchase order reference number.
<input checked="" type="checkbox"/> Send Invoice	If the order is paid in full, enable to have an invoice sent to the Patron's entered address.
Sold By	The ID number of the user responsible for initiating the sale of the tickets For example, a telemarketer. You can change this number by entering a number or click the User  icon to select a specific employee code.
Why did Patron Buy?	Select the Reason the Patron bought the tickets from the Drop Down list. You use this field to analyze customer purchase behavior by recording how the patron heard about the performances and why they are purchasing tickets. Type the letter N. The value in the field changes to "Newspapers". Entering a letter will make a matching value from the list appear. If more than one value matches your entry, type enough letters to find the required value. <ul style="list-style-type: none"> Refer to the online help Mandatory Data to determine if this field is optional or required.
b. Ticket Handling—These are radio buttons and you can make only one selection.	
Hold for Pickup	The patron will visit the Box Office prior to the performance to pickup their tickets.
Mail to Patron	The patron request the tickets be mail.
Hold for Will Call	The patron will pickup there tickets at the door.
Hold @ Door for Coupon	A Promotion, requiring coupons to be valid.
c. Ticket Printing	
Mark Ticket as Printed	<input checked="" type="checkbox"/> - To display a printed date for the ticket even though the ticket has not been printed.
Print Address Ticket	<input checked="" type="checkbox"/> - To print an additional ticket with the patrons address. The default address ticket can be selected under the Ticket Face tab in Company Preferences. <ul style="list-style-type: none"> For details on setting Company Preferences, see the online help, Company Preferences-Ticket Faces.
Cut Tickets	Radio buttons to define if the tickets are to be cut. Choices are: <ul style="list-style-type: none"> Cut each ticket Cut after the last ticket printed Do not cut tickets
d. Payment Source—These are radio buttons and you can make only one selection.	
Internet/Web Sales	The transaction is processed over the internet. A default Fee amount can be added to this payment source. <ul style="list-style-type: none"> For details on setting this and the following options, see the online help Fee Tables - Edits Tab

Telephone Order	The transaction is processed over the telephone. A default Fee amount can be added to this payment source.
Mail Order	The patron mails in the transaction request. A default Fee amount can be added to this payment source.
Patron Present	The patron is in person to make the transaction. A default Fee amount can be added to this payment source.
e. Order Comments	
Ticket Comment	Enter any specific notes about the order.
Order Notes	This field can be used for a number of different purposes. For example, the details about a refund.

1. Choose the Payment Method from the drop down list.

3. Payment Information	
Payment Method	<p>Select a Method of payment for the order from the Drop down list. Your choice displays the payment entry fields for the option selected.</p>  <ul style="list-style-type: none"> • The values of the list are setup in the Payments Tab of Code Tables. See the online help Code Tables – Introduction

2. Enter the details for the method you have selected for payment. A description of the different field for the options are: