

Theater Manager's Ticket Management



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First Draft Released 1/11/10

Second Draft Released 1/15/10

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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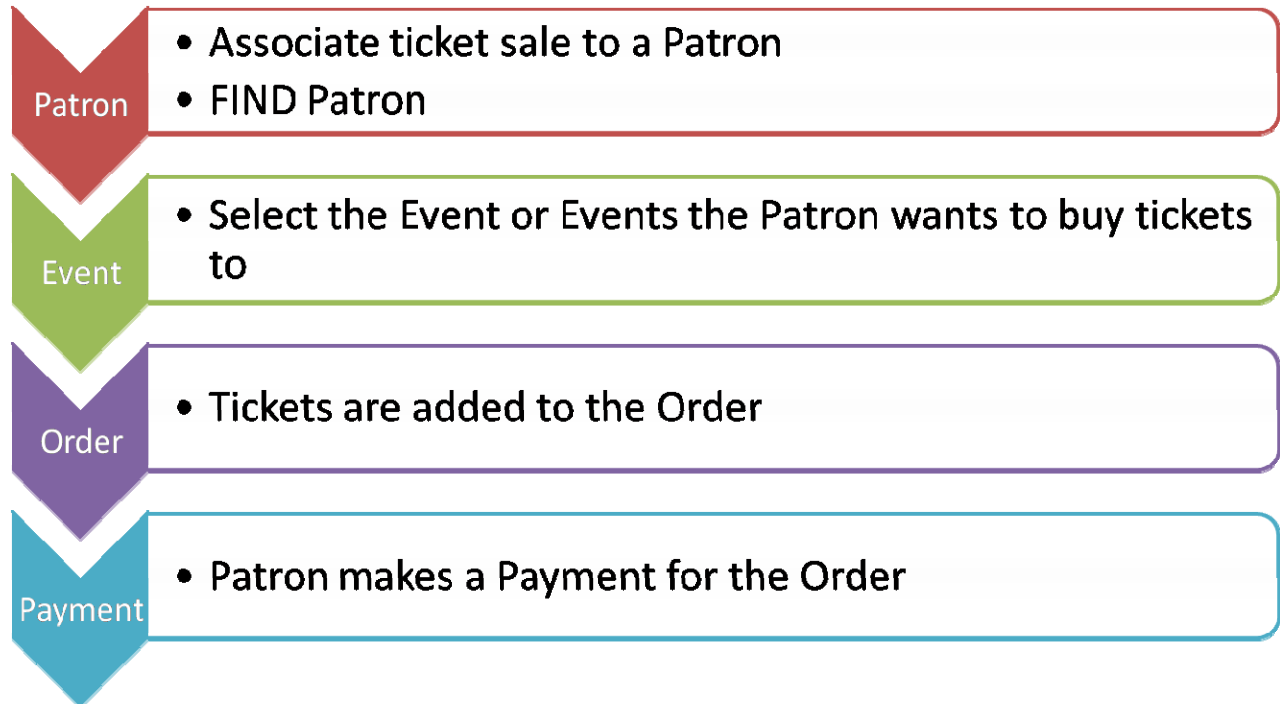
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Ticket Management

Introduction to Ticket Sales

Selling a ticket consists of four parts. These are:




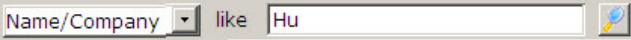






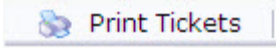


Ticket sales are associated to a Patron's record.









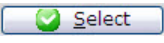

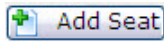


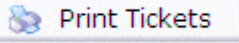
Although there is much more to the process around tickets—for example: exchanging, refunding, adding to orders, etc. all actions can be broken down into these four steps.

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




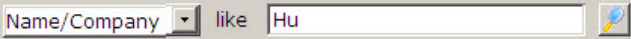




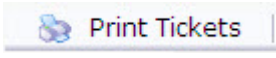
Selling a Ticket Quick Reference Sheet

Step	Function	More Information
 <p>Patron</p>	<ol style="list-style-type: none"> Click the Patron  button in the tool bar. The Contact List window opens. Enter your search criteria and click the Search  button.  The Contact List window displays the patrons matching your entry. 	<p>For more information, see the online help section - Finding a Patron Using the Contact List Window.</p>
 <p>Event</p>	<ol style="list-style-type: none"> Highlight the Patron you want to buy tickets for and click the Buy Tickets  button. The Order window opens. In the Performance Selection tab, select the event from the event list. Several events can be chosen at the same time. Click the Seat Selection  button. 	<p>For more information the Event Step, see: Step 2—Select Events, page 12</p>
 <p>Order</p>	<ol style="list-style-type: none"> The Seat Selection window opens with the performance you have selected appearing in the event portion of the window. If required, choose the Promo Code. The Promo code specifies if there are discounts for children, youth or seniors. Select the seats in the Theatre Seats Graphic by clicking them. Seats that have previously been sold are marked. 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. Click the Payment  button. 	<p>For more information on the Order Step, see: Step 3—Tickets are Added to Order, page 23</p>
 <p>Payment</p>	<ol style="list-style-type: none"> Enter the payment information. Click the Print Tickets  button. Clicking this button accepts the payment, prints the tickets and returns you to the Contact List window. 	<p>For more information on this step, see: Error! Not a valid result for table. page 38</p>




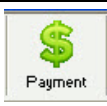
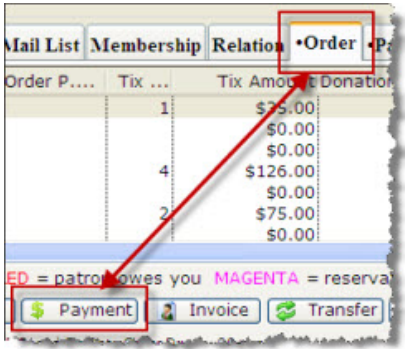
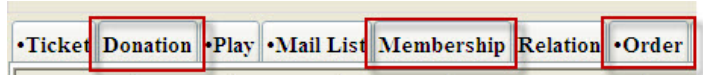

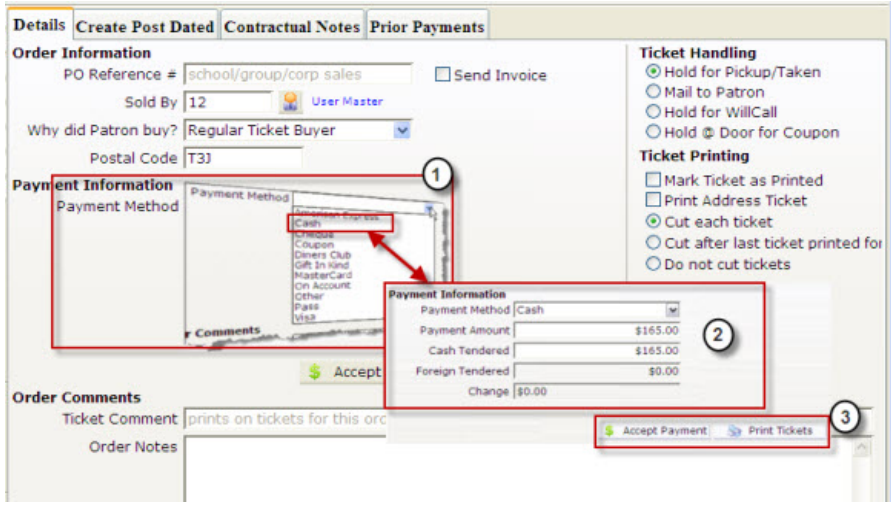
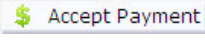
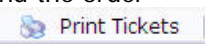
Selling Season Tickets Quick Reference Sheet

Step	Function	More Information
	 1. Click the Patron button in the tool bar. The Contact List window opens. 2. Enter your search criteria and click the Search  button.  3. The Contact List window displays the patrons matching your entry.	For more information, see the online help section - Finding a Patron Using the Contact List Window .
	4. Highlight the Patron you want to buy tickets for and click the Buy Tickets  button. The Order window opens. 5. Click the Season  button. The Season Subscription display opens. 6. Click the New  button. The Select a Season Package window opens. 7. Select the package for the patron. 8. Click the Select  button. The Performance Selection window opens. 9. Pick the performance night for the patron, and click the Select button.	For more information the Event Step, see: Step 2—Select Events, page 12
	10. The Subscription window opens Choose the appropriate Seat and Price Code. 11. Click the Add Seat  button. The seat(s) picked appear in the Favorite Seats tab. 12. Click the Book  button. 13. Theatre Manager books the tickets to each performance in the Season Package. Once all seats have been booked, the user is moved to the Payment section of the Order window. The user can continue to add other tickets, passes, or memberships, or complete the payment process. As seats are selected they appear in the seats portion of the window and a running total of the Order appears in the lower left of the window.	For more information on the Order Step, see: Step 3—Tickets are Added to Order, page 23
	14. Enter the payment information. 15. Click the Print Tickets  button. Clicking this button accepts the payment, prints the tickets and returns you to the Contact List window.	For more information on this step, see: Error! Not a valid result for table. page 38

Exchange a Ticket Quick Reference Sheet

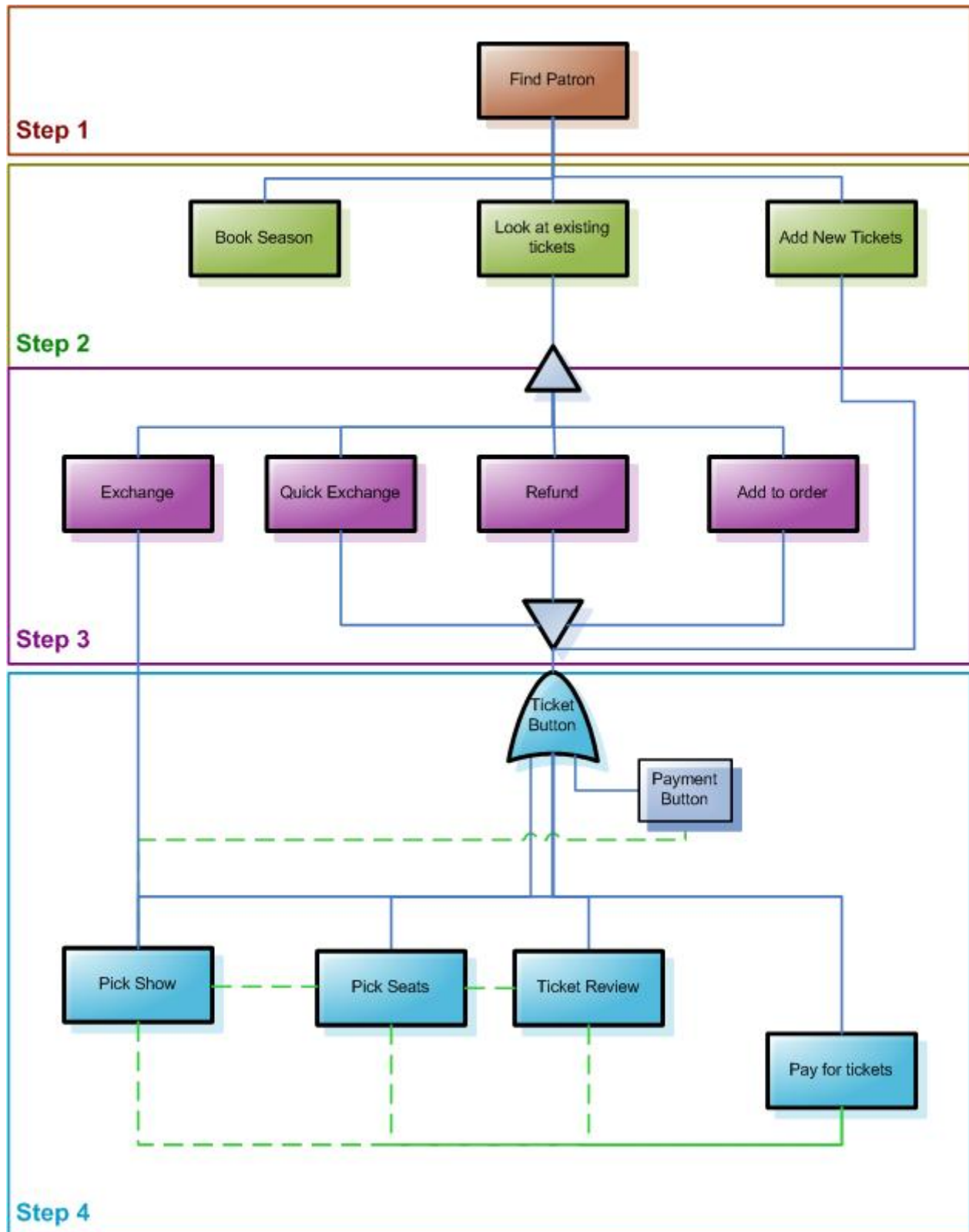
Step	Function	More Information
	<ol style="list-style-type: none"> Click the Patron  button in the tool bar. The Contact List window opens. Enter your search criteria and click the Search  button.  The Contact List window displays the patrons matching your entry. 	<p>For more information, see the online help section - Finding a Patron Using the Contact List Window.</p>
	<ol style="list-style-type: none"> Highlight the Patron you want to exchange the tickets for and click the 	<p>For more information the Event Step, see: Step 2—Select Events, page 12</p>
	<ol style="list-style-type: none"> 	<p>For more information on the Order Step, see: Step 3—Tickets are Added to Order, page 23</p>
	<ol style="list-style-type: none"> Click the Payment  button. Enter the payment information. Click the Print Tickets  button. Clicking this button accepts the payment, prints the tickets and returns you to the Contact List window. 	<p>For more information on this step, see: Error! Not a valid result for table. page 38</p>

Take a Payment Quick Reference Sheet

Step	Function	More Information
  	<ol style="list-style-type: none"> Find the patron. Select the event. Add tickets to the order. Payments can be created for new orders or added to existing orders. There are several ways to access the payment window in Theatre Manager. 	<p>Step 1—Find a Patron, page 11</p> <p>Step 2—Select Events, page 12</p> <p>Step 3—Tickets are Added to Order, page 23</p>
	<p>Payment</p>	<p>For a new ticket order, click the Payment button in the Order window.</p>
	<p>When a payment needs to be added to an existing order, from the Patron Window, you can select the:</p> <ul style="list-style-type: none"> • Donation tab • Membership tab and • Order tab <p>Click the Payment button to opens the Payment for Order number window. Once you are in the payment window, you perform the following steps:</p>	
	 <ol style="list-style-type: none"> Choose the Payment Method from the drop down list. Once you have selected the payment method, enter the details. 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>For a detailed description of Payments, see: Step 4—Making Payments, page 39</p>


Ticket Sales Data Flow Diagram

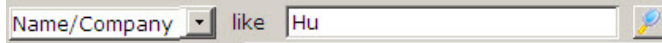
The following diagram shows all of the options Theatre Manager offers in managing tickets for patrons. Sections are broken up into the four step process that you use in selling tickets.




Step 1—Find a Patron

Basics

1. Click the **Patron**  button in the tool bar. The Contact List window opens.



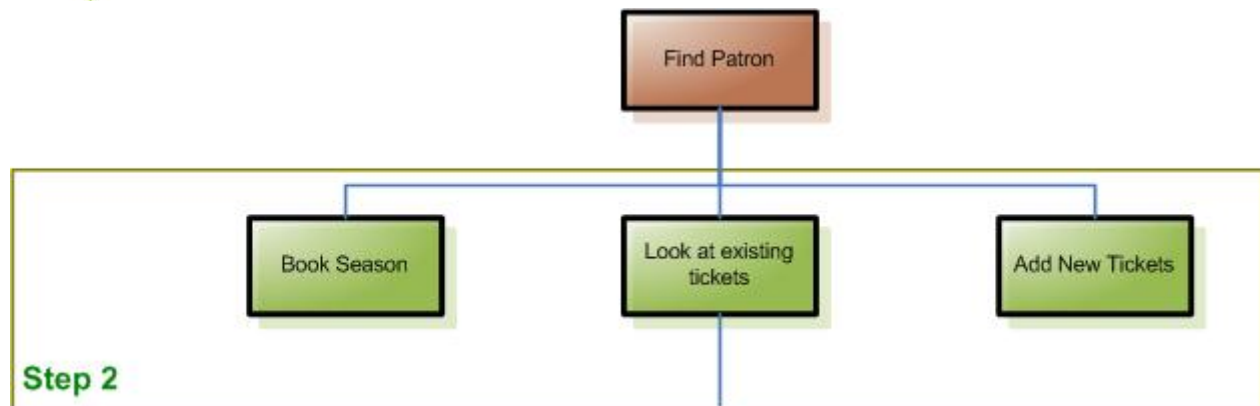
Search interface showing a dropdown menu with "Name/Company", a "like" operator, and a text field containing "Hu".

- 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

Event

Select the Event or Events the Patron wants to buy tickets to



In step two, you have three options, depending on what your selected Patron's requirements are, You can:

Add New Tickets

Quick selection. Allows you to purchase tickets for the Patron from the Contact List window. See [Step 2—Add New Ticket, page 13](#).

Book a Season

Allows you to select a season subscription package for the selected Patron. For more information, see [Step 2—Book Season Tickets, page 17](#).

Look at Existing Tickets

Gives you many more ticket options. These are fully covered in **Step 3**:

- Exchange—Full Exchange of Tickets, [page 25](#).
- Quick Exchange—*Quick Exchange*, [page 28](#).
- Add to Order—[Step 3—Add More Tickets To an Existing Order, page 29](#).
- Refund—[Step 3—Refund Tickets, page 31](#).
- Purchase—[Step 4—Paying for Tickets, page 35](#).
- Payments—[Step 4—Making Payments, page 39](#).

Step 2—Add New Ticket

Basics



1. Click the **Patron** button in the tool bar. The Contact List window opens.



1. Enter your search criteria and click the **Search** button.
2. The Contact List window displays the patrons matching your entry.
 - For more information, see the online help section - [Finding a Patron Using the Contact List Window](#).



3. Highlight the Patron you want to buy tickets for and click the **Buy Tickets** button. The **Order** window opens.
4. In the **Performance Selection** tab, select the event from the event list. Several events can be chosen at the same time.





5. Click the **Seat Selection** button.
6. The **Seat Selection** window opens with the performance you have selected appearing in the event portion of the window.
7. If required, choose the Promo Code. The Promo code specifies if there are discounts for children, youth or seniors.
8. Select the seats in the Theatre Seats graphic by clicking them. Seats that have previously been sold are marked.
9. 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.
10. Click the **Payment** button.
11. Enter the payment information.
12. Click the **Print Tickets** button. Clicking this button accepts the payment, prints the tickets and returns you to the Contact List window.


Payment

Print Tickets

Buy a Ticket

1. Click the **Patron**  button in the tool bar. The Contact List window opens.

Enter your search criteria and click the **Search**  button.

Name/Company 

2. The Contact List window displays the patrons matching your entry.

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

You can:

Highlight the patron

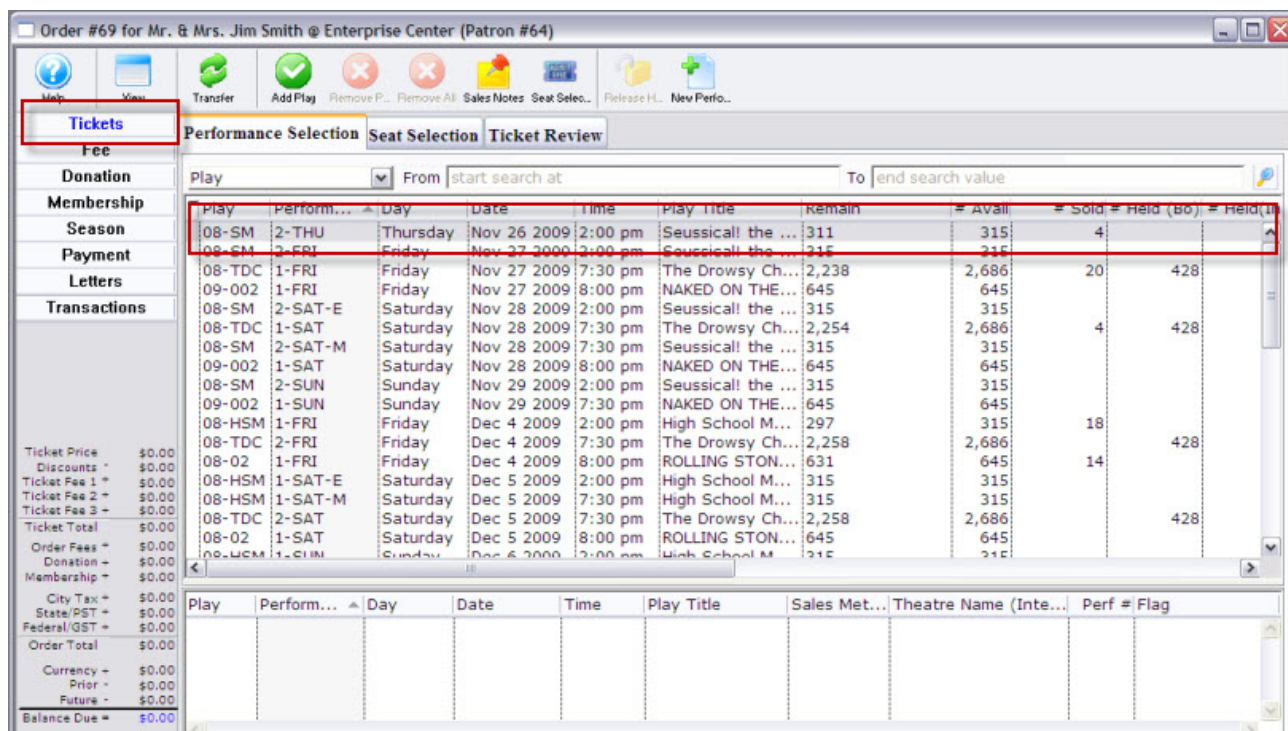


Click the **Buy Tickets**  button in contact list ribbon bar.

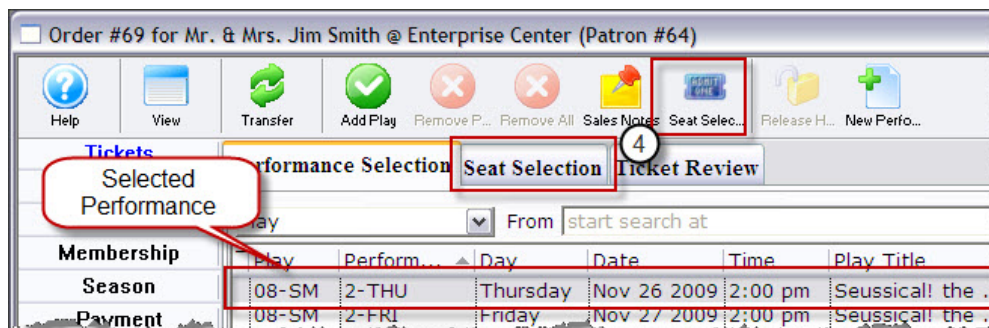
Or:

Double click the selected patron to pen the patron window

Click the **Tickets**  button at the bottom of the Patron Window.



- For a description of the Order window, see [page 46](#)



3. In the **Performance Selection** tab, pick the appropriate event from the event list. Several events can be selected at the same time.
Click the **Seat Selection** tab or button.
4. The Seat Selection window opens The performance you have chosen appears in the Event portion of the window.
5. If required, choose the Promo Code—in this example, all of the seats are adult.
6. 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.






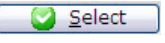
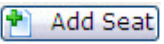

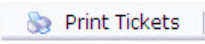
7. Click the **Payment** button.
 - For more information on Payments, see **Step 4—Making Payments, page 39.**
8. Click the **Accept Payment** or **Print Tickets** button. The tickets and any other items are purchased. The screen returns to the Contact List window.

Other Methods to Purchase Tickets

Function	Description	Link to Online Help page
Pay What You Can	Pay-What-You-Can (PWYC) is intended to allow the sale of tickets to any performance of any event and collect from the patron any amount that they can offer toward the cost of those tickets. For example: If they only have \$10 and the admission price is \$15 the ticket can be sold a "pay what you can ticket". Ultimately this method of sale allows patrons from any economic status to attend your events and for those patrons who may not attend because of ticket price this becomes an offering of an affordable option.	Pay What You Can Sales
Travelling Troupe Ticket Sales	To sell a Traveling Troupe performance a performance must be created for the sale to be assigned to a patron.	Travelling Troupe Tickets
Before Event Sales	Before Event Sales is designed to reserve and print tickets quickly for patrons who purchase tickets prior to an performance. All tickets sold using this method are sold to the same patron, and can be sold within the same order or given separate orders.	Before Event Sales
Quick Buy Ticket Sales	Quick Buy is designed to reserve tickets quickly for patrons prior to getting the patron's name and information. All tickets sold using this method are sold to the same patron, creating a new order for each group of tickets. After reserving tickets using the Quick Buy method, the ticket orders are transferred to the actual patron's account who purchased the tickets. Quick Buy can be done for reserved and festival seating performances.	Quick Buy Ticket Sales


Step 2—Book Season Tickets


Basics

1. Click the **Patron**  button in the tool bar. The Contact List window opens.
13. Enter your search criteria and click the **Search**  button.
 - For more information, see the online help section - [Finding a Patron Using the Contact List Window](#).
2. The Contact List window displays the patrons matching your entry.
3. Highlight the Patron you want to buy tickets for and click the **Buy Tickets**  button. The **Order** window opens.
4. Click the **Season**  button. The Season Subscription display opens.
5. Click the **New**  button. The Select a Season Package window opens.
6. Select the package for the patron.
7. Click the **Select**  button. The Performance Selection window opens.
8. Pick the performance night for the patron, and click the **Select** button.
9. The Subscription window opens Choose the appropriate Seat and Price Code.
10. Click the **Add Seat**  button. The seat(s) picked appear in the Favorite Seats tab.
11. Click the **Book**  button.
12. Theatre Manager books the tickets to each performance in the Season Package. Once all seats have been booked, the user is moved to the Payment section of the Order window. The user can continue to add other tickets, passes, or memberships, or complete the payment process. As seats are selected they appear in the seats portion of the window and a running total of the Order appears in the lower left of the window.
13. Enter the payment information.
14. Click the **Print Tickets**  button. Clicking this button accepts the payment, prints the tickets and returns you to the Contact List window.

Via the Order Window—Season Button

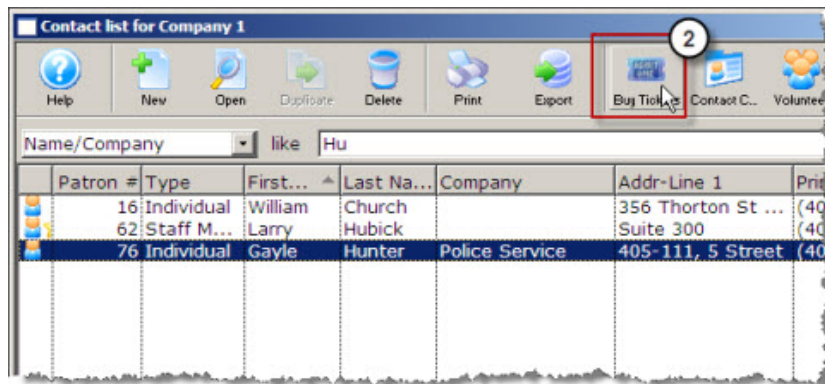
Within the Order window, you can subscribe a patron to a season package and book their seats on the same order with other purchases.


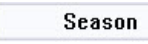
1. Click the **Patron**  button in the tool bar. The Contact List window opens.

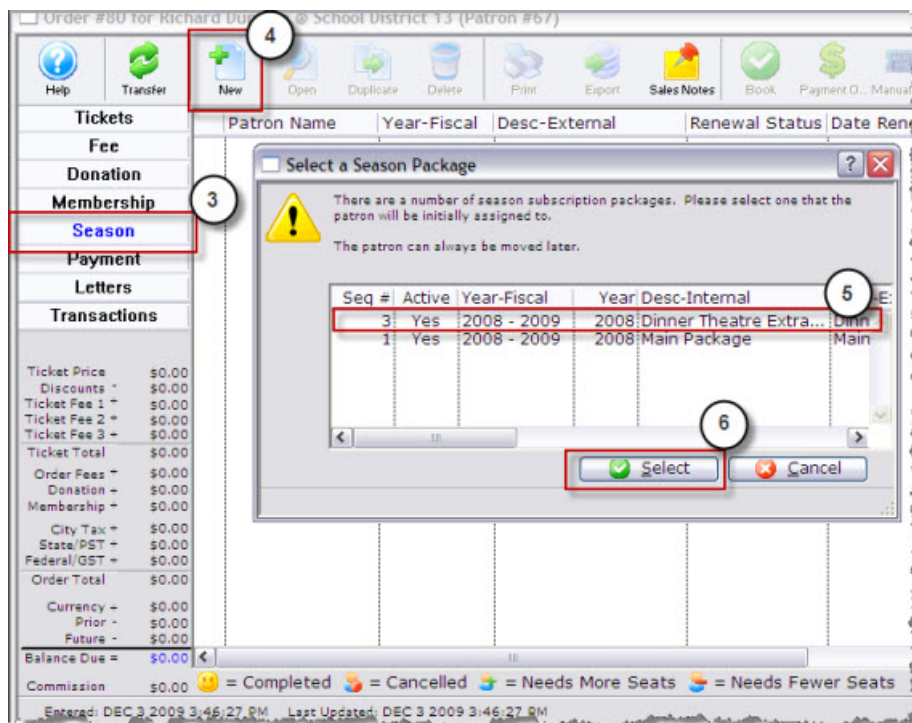
Enter your search criteria and click the **Search**  button.


The Contact List window displays the patrons matching your entry.

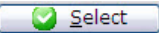
- For more information, see the online help section - [Finding a Patron Using the Contact List Window](#).

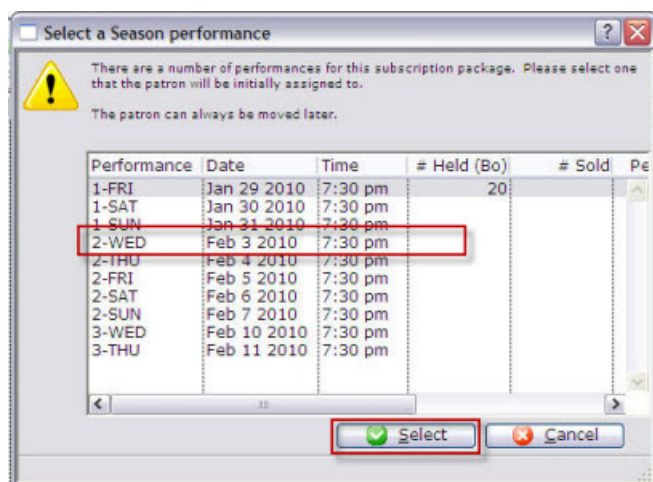


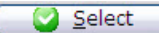
2. Click the **Buy Ticket**  button. A new Order window for the selected patron opens.
3. Click the **Season**  button. The Season Subscription display opens.

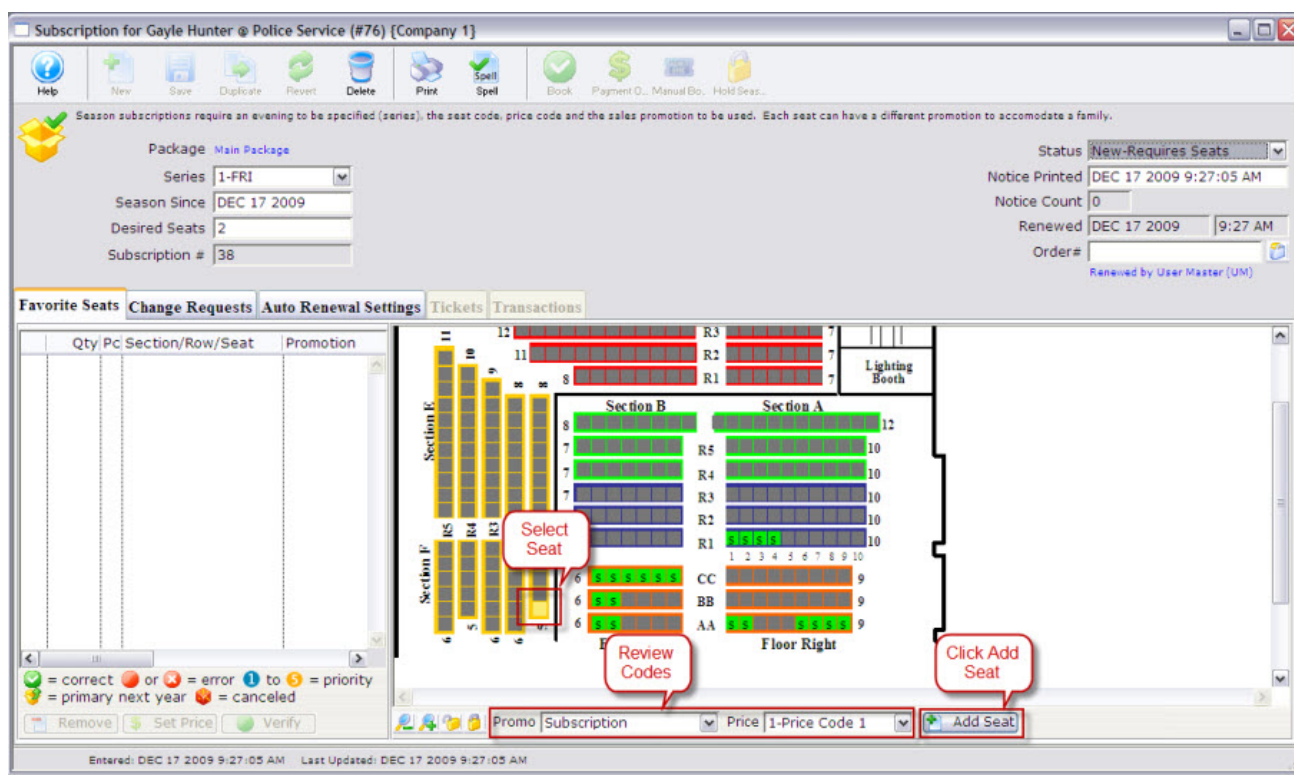


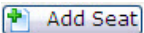
4. Click the **New**  button. The Select a Season Package window opens.
5. Highlight the package the patron wants.

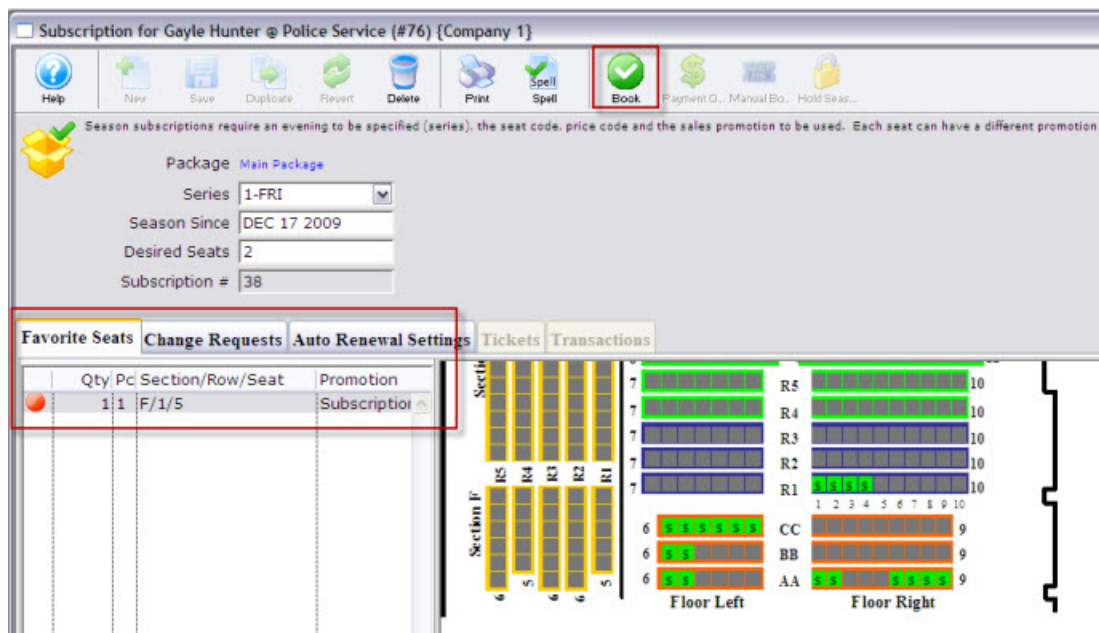
- Click the **Select**  button. The Performance Selection window opens.



- Pick the performance night for the patron, and click the **Select**  button.
- The Subscription window opens. Choose the appropriate Seat and Price Code.



- Click the **Add Seat**  button. The seat(s) chosen appear in the Favorite Seats tab.



10. Click the **Book**  button.

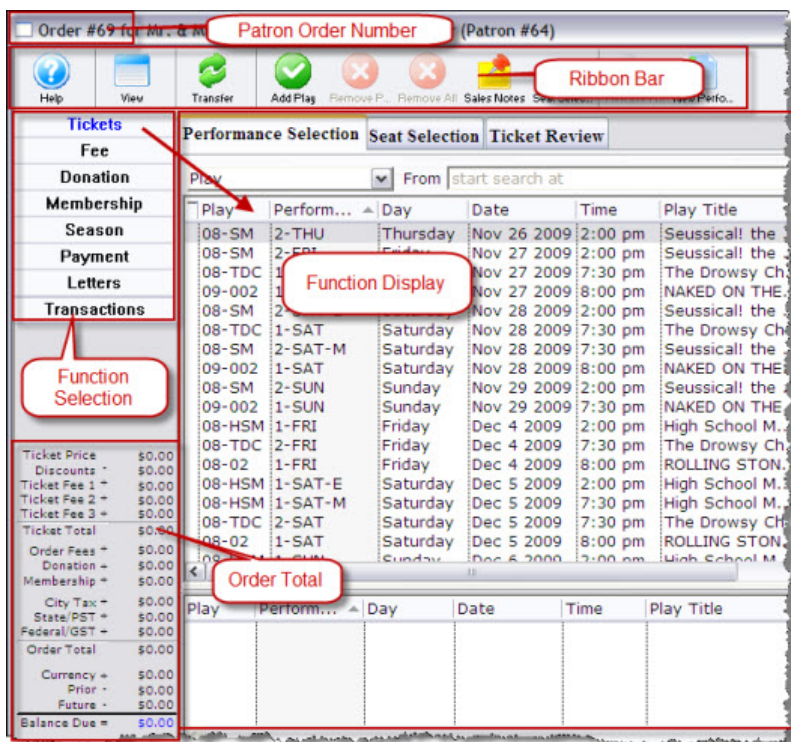
Theatre Manager books the tickets to each performance in the Season Package. Once all seats have been booked, the user is moved to the Payment section of the Order window. The user can continue to add other tickets, passes, or memberships, or complete the payment process.

Step 2—Look at Existing Tickets

You can determine everything you need to know about a patron's tickets in the Order Window and the Tickets portion of the Patron window.

Parts of the Order Window

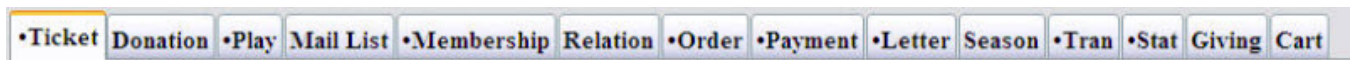
The Order window displays all information about an Order.



What you see in the Order window changes depending on what function button is enabled, however, it does have common elements. These are:

Patron Order Number	A unique number used to define the order.
Order Window (Function Selection) Buttons	The buttons on the left of the window change the view. When a button is clicked the view changes but the order stays the same. This allows for the purchase of tickets, donations and memberships in one order. Once an order is complete it can be opened to view, edit or add payments, purchases, taxes and more. For more information on the Order Window selections, see Order Window Buttons (Function Selection), page 47.
Ribbon Bar	The ribbon bar consolidates the “one-click” tools available for the Function Display. As you change the interface by clicking the Function Selection buttons and the tabs within the Function Display, the ribbon bar displays the tools available. The Ribbon bar for each function is described in each section.
Function Display	This display changes depending on the Function Button selected and the Page tab clicked.
Order Total	As you buy tickets, make donations, payments, etc, the Order Balance is displayed in the lower left portion of the screen.

Patron Account Tabs



Clicking on a tab brings the tab to the front and its contents are displayed in the window below. In some instances, one or more of the tabs may have a bullet prior to its name-meaning there is information contained in that section.

The Ticket Display

The Patron Accounts portion of the window contains the information about a patron's tickets.



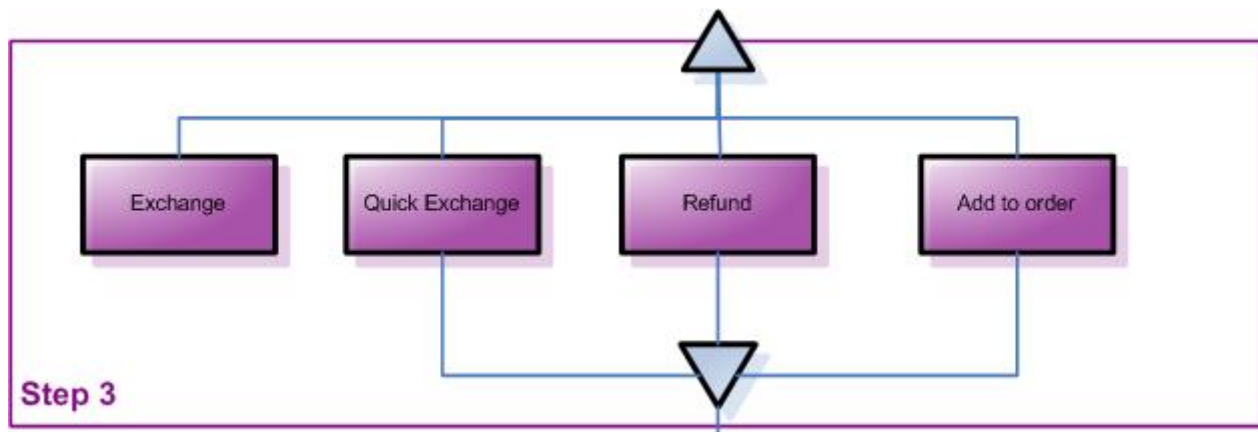
Here you can see all of a patron's ticket purchases. All of the important ticket information is detailed--the codes associated with the event, the number of tickets, the seat number(s), the date of the event and the price and promotion codes the ticket(s) were sold for are also shown.

- For more information on the **Parts of the Ticket Display**, see page 60.

Step 3—Tickets are Added to Order

Order

Tickets are added to the Order



We recommend you:

Use Quick Exchange

For more information on

Quick Exchange see,

Page 28

Quick exchange is a fast exchange procedure that automatically applies the same price and sales promotion on a replacement ticket as was on the original ticket.

When the original ticket and the replacement ticket are not of the same value a warning appears indicating there is a difference in ticket values.

The operator is not required to select the price code or the promotion code during the exchange.

The price and promotion code on the original ticket is automatically applied to the replacement ticket.

The operator can cancel the Quick Exchange and complete a regular exchange.

If quick exchange is used and an amount is accidentally waived, a regular exchange can be used to reverse the waived amount.

Turn off Automatic Waiving

For more information on Waived Amounts, see the online help

[Ticket Sales- Waived Amounts](#)

Turn off automatic waiving to prevent accidental waiving of the difference between the price of the original tickets and the replacement tickets when an incorrect replacement ticket was purchased.

Turning off automatic waiving requires the employee to decide if any difference between the original tickets and the replacement tickets is to be refunded or collected. Select both checkboxes to collect money for higher priced tickets and to refund money for lower priced tickets.

Step 3—Exchanging Tickets

Overview

Exchanging tickets can be performed for Festival, Reserved or Traveling Troupe sales, exchanging from one performance to another within the same event, or across events, or from a higher price to a lower price ticket, and from a lower price to a higher price ticket. Theatre Manager calculates the differences of ticket prices, adds on an optional exchange fee and presents the final cost of the ticket exchange. There are no restrictions when exchanging tickets.

The only condition when exchanging tickets is the tickets you select to exchange must exist within the same order number.

The program has security controls that can be set up for each employee or as an organization default.

See Employee Setup for more information on the controls. Click on the following links to access the online help descriptions for some of the applicable controls:

- [Allowing exchanges for performances of past performances.](#)
- [Allowing exchanges for printed tickets.](#)
- [Collecting or not collecting the difference in money for higher priced tickets.](#)
- [Refunding or not refunding the difference in money for lower priced tickets.](#)

Exchange Hints


Errors occur during a ticket exchange when:


- The differences in the price of the original ticket and the replacement ticket is not collected or refunded correctly.
- The amount not refunded or collected is waived by Theatre Manager. For more information on Waived Amounts, see the online help [Ticket Sales-Waived Amounts](#).
- The ticket base price and sales promotion for replacement ticket does not match the ticket base price and sales promotion of the original ticket.


Full Exchange of Tickets

Full Exchange process gives you full control over the entire exchange procedure—basically, the patron is purchasing new tickets to replace the selected tickets. Throughout the process you can back out from exchanging the patron's tickets and the original tickets are still sold to the patron.

To exchange the tickets, you would perform the following steps.

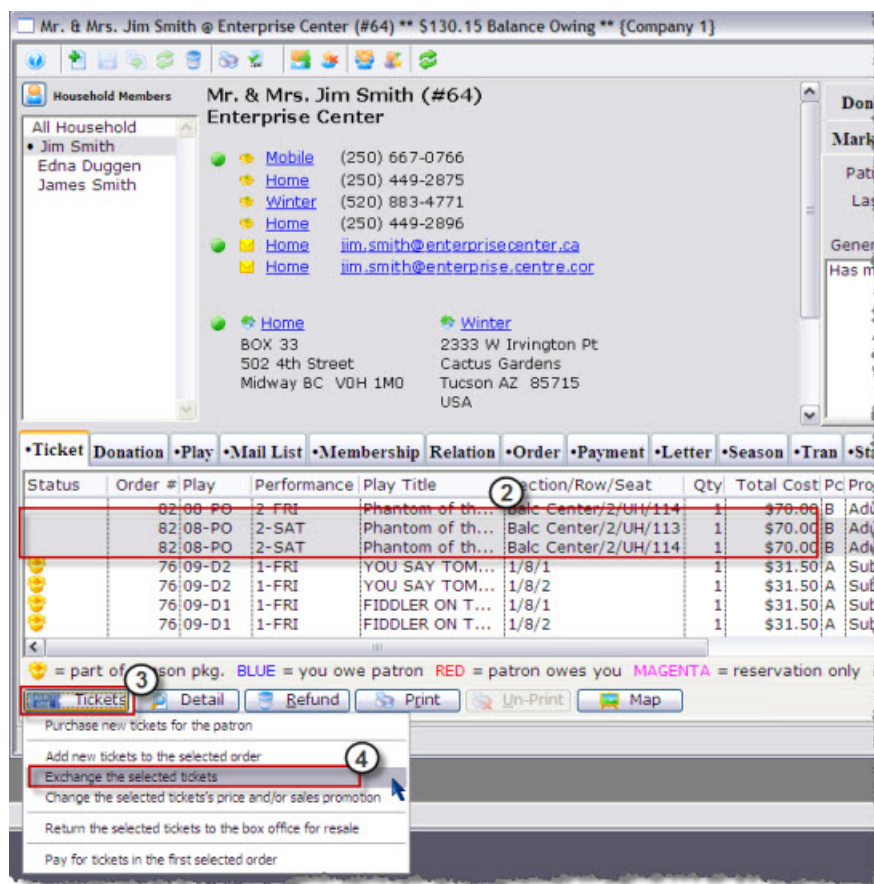
1. Click the **Patron**  button in the tool bar. The Contact List window opens.

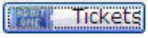
Enter your search criteria and click the **Search**  button.

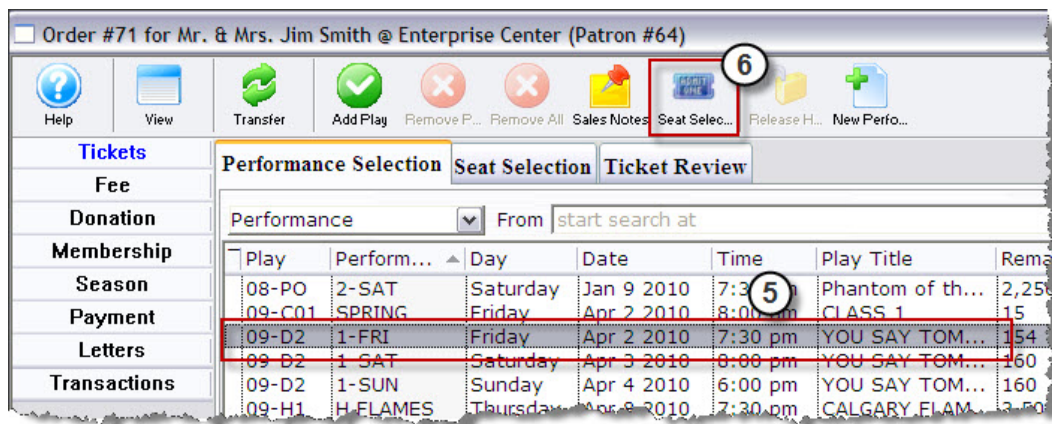
Name/Company 

The Contact List window displays the patrons matching your entry. Highlight the one you want. Double-click to open the Patron window.

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

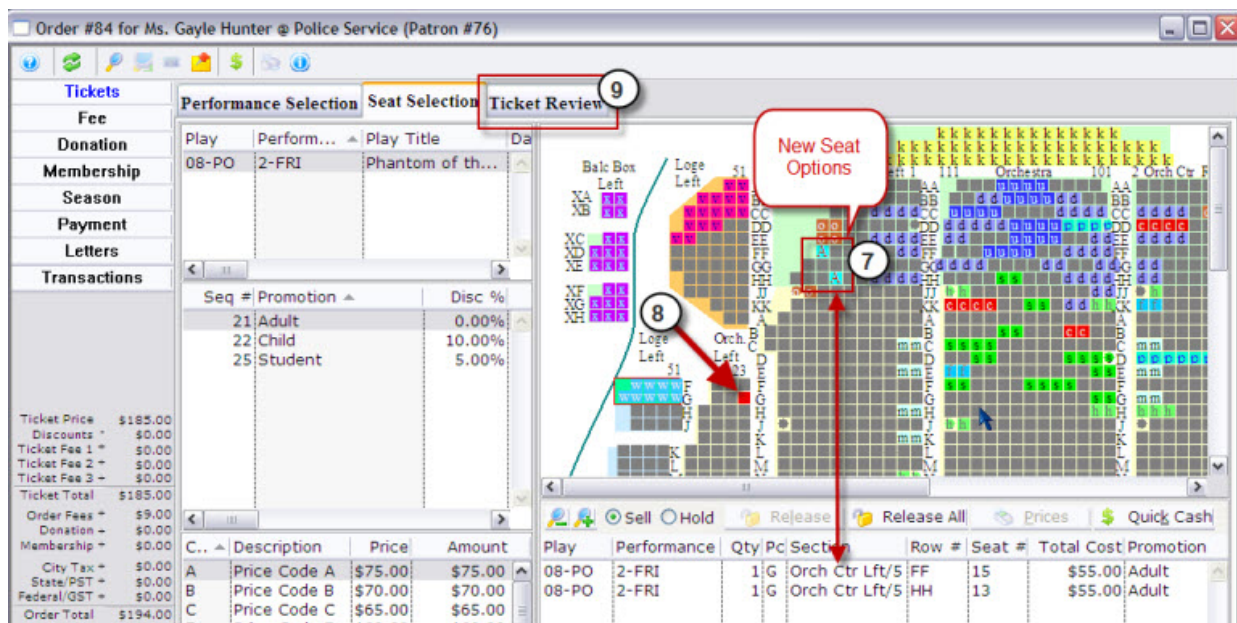


2. Highlight the tickets to be exchanged.
3. Click the **Tickets**  button. The function selection list opens.
4. Choose **[Exchange the selected tickets]**. The Performance Selection window opens.



5. Select the list of performances that the patron wants to exchange the tickets for.

6. Click the **Seat Selection** button or **Seat Selection** tab. The Ticket Sale Window opens with the information for the selected performance.



7. Choose the seats that the patron wants to exchange the original tickets for.

8. Note the red seats indicating the location of the previous seats.

9. Click the **Ticket Review** **Ticket Review** tab.

Order #84 for Ms. Gayle Hunter @ Police Service (Patron #76)

10

11

Payment


Transactions

Play	Performance	Qty	Pc	Section	Row #	Seat #	Total Cost	Promotion
08-PO	1-FRI	1	A	Orch Left/5	G	23	\$75.00	Adult
08-PO	2-FRI	1	G	Orch Ctr Lft/5	FF	15	\$55.00	Adult
08-PO	2-FRI	1	G	Orch Ctr Lft/5	HH	13	\$55.00	Adult

- is exchange from and
+ is exchange to

Ticket Price \$185.00
 Discounts - \$0.00
 Ticket Fee 1 + \$0.00
 Ticket Fee 2 + \$0.00
 Ticket Fee 3 + \$0.00
 Ticket Total \$185.00
 Order Fees + \$9.00
 Donation + \$0.00
 Membership + \$0.00
 City Tax + \$0.00
 State/PST + \$0.00
 Federal/GST + \$0.00
 Order Total \$194.00
 Currency + \$0.00
 Prior - \$80.00
 Future - \$0.00
 Balance Due = \$114.00
 Commission \$3.00

★ = new sale ✖ = refund - = exchange from + = exchange to

10. Click the **Confirm**  button to complete the ticket exchange.

11. Click the **Payment**  button.

- For more information on Payments, see [Step 4—Making Payments, page 39](#).

12. Click the **Accept Payment**  or **Print Tickets**  button. The tickets and any other items have been purchased.

Clicking Accept Payment finalizes the exchange, clicking Print Tickets finalizes the exchange and prints the new tickets. The original tickets are returned to inventory when either button is clicked. They can now be purchased again.

Quick Exchange

The Quick Exchange process allows you to quickly exchange tickets from one performance to another without creating a buy list, selecting the tickets to purchase, and creating a payment. The simplified process gives you the power to enter in the play code and series code the ticket is being exchanged for. The same price code and sales promotion will be used for the new ticket. If there is a price difference between the two tickets, then the payment window opens otherwise no payment is required.

13. Find the patron who wants to exchange their tickets.

- To learn how to find patrons, see [Finding a Patron Using the Contact List Window](#).

14. Highlight the tickets to be exchanged

15. Select the Quick Exchange Button

The Exchange Tickets window opens displaying the first ticket selected to be exchanged.

16. Enter the play code for the new ticket

If you do not know the event code click the Lookup Button

Search for the performance for the new ticket, double click on the selected performance. The event code and series code will now be displayed on the Exchange Tickets window.

Enter the Performance Code for the new ticket

For Reserve Ticket Sales the quantity display field will be replaced by a Seat Code field.

If Reserved Seating, Enter the Seat Code for the new ticket

If you do not know the seat code click the Lookup Button to search for available seats.

Search for a seat code for the new ticket, double click on the selected seat. The seat code will now be displayed on the Exchange Tickets Window.

Select the correct ticket print date

Keep Printed Date

Makes the exchange ticket have the same ticket print date as the original ticket.

Clear Printed Date

Makes the exchange ticket have no ticket printed date. This will enable you to reprint the new ticket.

Mark As Today's Date

Makes the exchange ticket have a ticket print date of the current date.

Click Save and Next Exchange

If there is a price difference from the original tickets to the exchanged tickets, the Payments window opens and ask for the payment information. Refer to the [Payment](#) section for more information on this process.

This will finalize the ticket exchange and update the database with the exchange. If there are more tickets to be exchanged, then the next ticket will be displayed.

Repeat steps 4 - 8 for all tickets that are being exchanged

When all tickets have been exchanged, the Ticket Exchanges window will automatically close.

To abort the exchange and start over

Click Start Over

This will display the original values of the ticket you were just exchanging. If any tickets have already been exchanged, they will not be effected.

To skip the exchange and move to the next ticket

Click Skip and Next Ticket

This will ignore the changed values of the ticket you were just exchanging and display the next ticket. If any tickets have already been exchanged, they will not be effected.

Step 3—Add More Tickets To an Existing Order

Theatre Manager allows you to add tickets to an existing patron order. To do this, you perform the following steps:

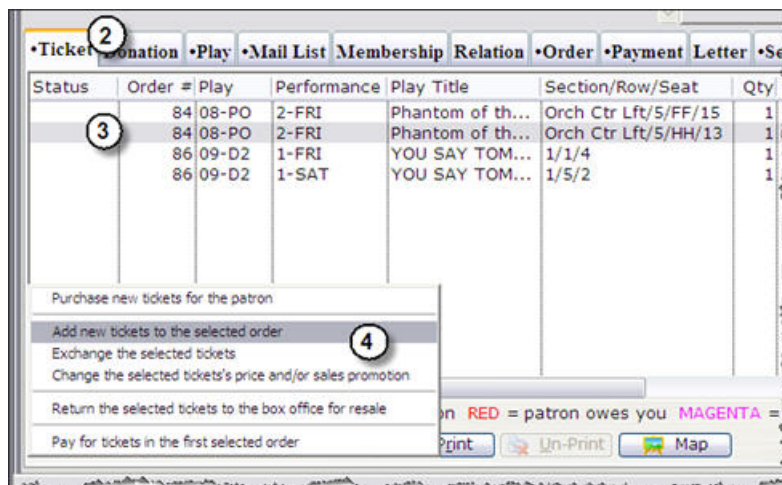
1. Click the **Patron** button in the tool bar. The Contact List window opens.

Enter your search criteria and click the **Search** button.

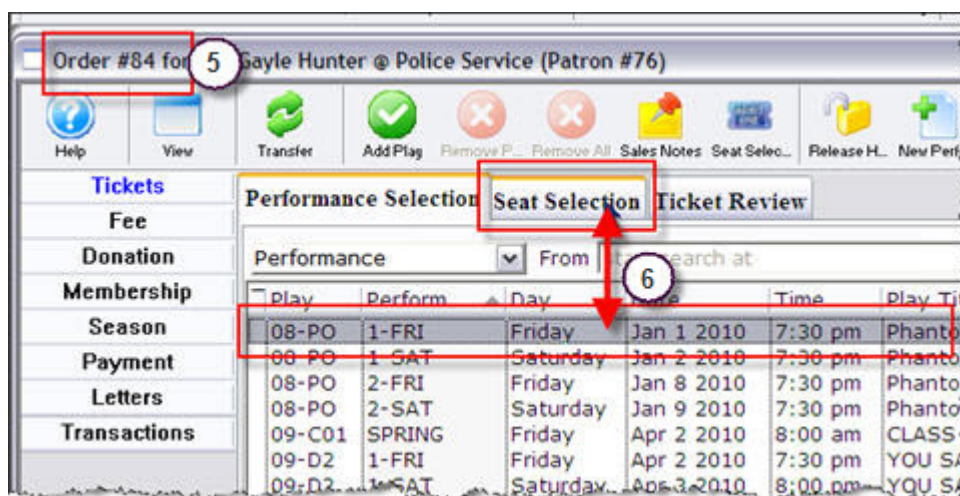
Name/Company like Hu

The Contact List window displays the patrons matching your entry. Highlight the one you want. Double-click to open the Patron window.

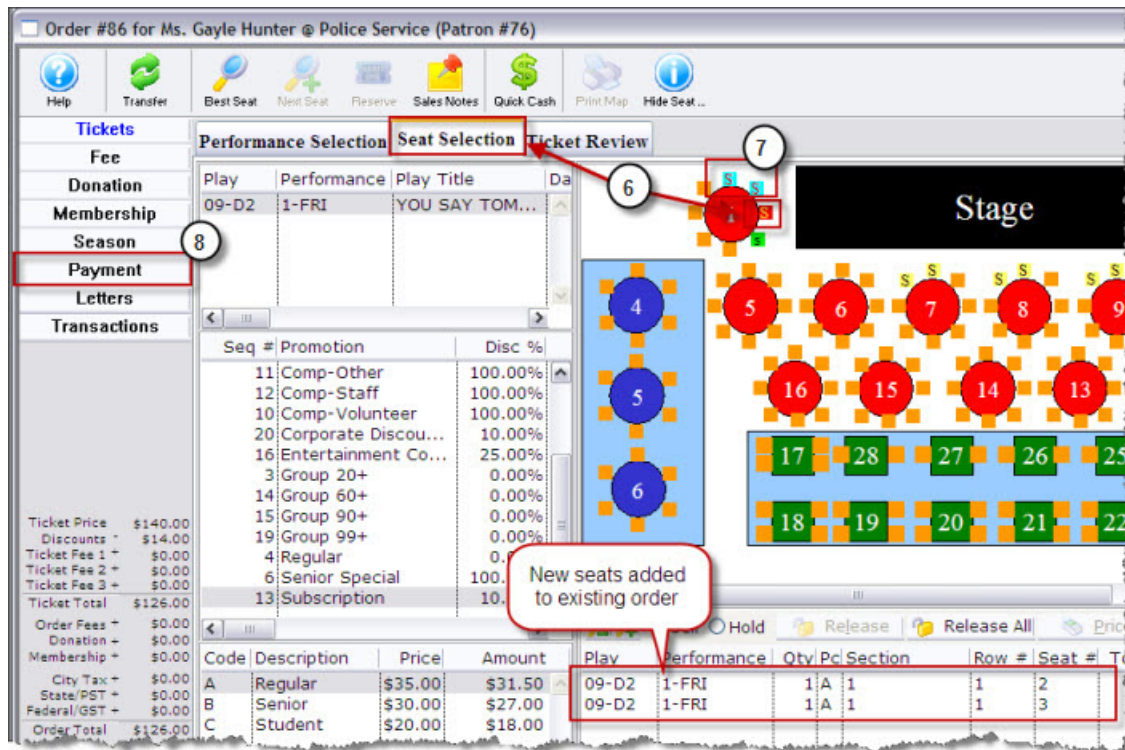
- For more information, see the online help section - [Finding a Patron Using the Contact List Window](#).



2. Click the **Ticket** tab.
3. Highlight a ticket in the order you want to add tickets to.
4. Clicking the **Add Tickets** button and choose [Add new ticket to the selected order].
5. The Order window for the selected ticket opens.



6. Select the event to add tickets to and click the **Seat Selection** tab. The Seat Selection window opens. The seats already a part of the order appear in red.



7. Choose additional seats as needed.
8. Click the **Payment** Payment button.
 - For more information on Payments, see **Step 4—Making Payments, page 39.**
9. Click the **Accept Payment** Accept Payment or **Print Tickets** Print Tickets button. The tickets and any other items have been purchased. The screen returns to the Patron window.

Process the payment and complete the transaction. The new tickets are purchased and added to the existing order.

Step 3—Refund Tickets

Overview

Theatre Manager calculates the refund amount:

- Using the ticket price(s) the tickets were sold for,
- Calculates a portion of the exchange fee (The portion of the exchange fee is only calculated if the tickets selected for refund were part of an exchange). If they were not on the payment window the exchange fee is not refunded.
- Adds in the order fee and
- Presents the user with the final cost of the ticket refund.




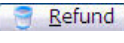

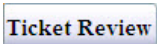


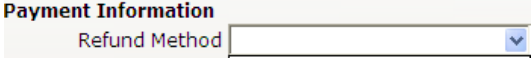

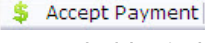
NOTE:

The only condition when refunding tickets is
The tickets selected must exist within the same order number.

Refunds can be defined for individual employees or as an organization default. Some of the available refund controls are:

- Allowing refunds for performances of past performances.
 - Allowing refunds for printed tickets.
 - Refund ticket when higher performance security and refund tickets when lower performance security.
 - Allowing order, exchange, and ticket fees to be refunded.
-
- More information on setting up the access to the controls, is found online at [Employee Setup - Function Access](#)

Basics

1. Open the patron window for the patron requiring a refund on their tickets.
2. In the Patron window, **Ticket**  tab, highlight the ticket you want to refund.
3. Click the **Refund**  button.
4. The Order Number window for the selected tickets opens to the **Tickets**  **Ticket Review**  tab.
5. The tickets you want to refund are marked with .
6. Click the Order Number window **Payments**  button.
7. From the **Refund Method**  **Refund Method**  drop down list, choose the appropriate method.
8. The fields for the method selected are displayed for your entry of the amount. Enter the required information.
9. Click the **Accept**  button. Theatre Manager returns the ticket for resale and return the user to the Patron Household Window.

Refund Process

To refund tickets, you perform the following steps.

Find the Patron:



1. Click the **Patron** button in the tool bar. The Contact List window opens.

Enter your search criteria and click the Search button.

Name/Company

The Contact List window displays the patrons matching your entry. Highlight the one you want. Double-click to open the Patron window.

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

In the Patron Window>Tickets tab:

10. Highlight the tickets to be refunded.

•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				
	84 08-PO	2-FRI		Phantom of th...	Orch Ctr Lft/5/FF/15	1	\$37.50	G	Adult				
	84 08-PO	2-FRI		Phantom of th...	Orch Ctr Lft/5/HH/13	1	\$37.50	G	Adult				
	86 09-D2	1-FRI		YOU SAY TOM...	1/1/2	1	\$31.50	A	Subscription				
	86 09-D2	1-FRI		YOU SAY TOM...	1/1/3	1	\$31.50	A	Subscription				
	86 09-D2	1-FRI		YOU SAY TOM...	1/1/4	1	\$31.50	A	Subscription				
	86 09-D2	1-SAT		YOU SAY TOM...	1/5/2	1	\$31.50	A	Subscription				
	90 09-C02	SPRING		CLASS 2	Festival Seating	1	\$37.50	Y	Entertainment Co..				
	90 09-C02	SPRING		CLASS 2	Festival Seating	1	\$37.50	Y	Entertainment Co..				
	89 09-D1	1-SAT		FIDDLER ON T...	1/6/2	1	\$35.00	A	Regular				

= part of season pkg. **BLUE** = you owe patron **RED** = patron owes you **MAGENTA** = reservation only **GRAY** = contain

1 of 9 1 ticket(s) selected. Value: \$31.50

11. Click the **Refund** button. The Ticket Review window opens displaying the ticket marked with (X).



NOTE:

The Donation Button can be used to quickly turn the amount of the refunded tickets into a donation.

- For the steps on doing this, see **Additional Information—Converting Refunded Tickets into a Donation**, page 62.

Order #86 for Ms. Gayle Hunter @ Police Service (Patron #76)

Help Transfer Detail Clear Exchange .. Exchange .. Refund Print Print+ UnPrint **Confirm** Print Export

Tickets

Fec

Donation

Membership

Season

Payment

Letters

Transactions

Ticket Price \$140.00
 Discounts - \$14.00
 Ticket Fee 1 + \$0.00
 Ticket Fee 2 + \$0.00
 Ticket Fee 3 + \$0.00
 Ticket Total \$126.00
 Order Fees + \$0.00
 Donation + \$0.00
 Membership + \$0.00
 City Tax + \$0.00
 State/PST + \$0.00
 Federal/GST + \$0.00
 Order Total \$126.00
 Currency + \$0.00
 Prior - \$126.00
 Future - \$0.00
 Balance Due = \$0.00
 Commission \$0.00

Performance Selection Seat Selection Ticket Review

Play	Performance	Qty	Pc	Section	Row #	Seat #	Total Cost	Promotion	Date Printed
09-D2	1-FRI	1	A	1	1	2	\$31.50	Subscription	
09-D2	1-FRI	1	A	1	1	3	\$31.50	Subscription	
09-D2	1-FRI	1	A	1	1	4	\$31.50	Subscription	
09-D2	1-SAT	1	A	1	5	2	\$31.50	Subscription	

★ = new sale ✖ = refund ➡ = exchange from ➤ = exchange to

UM Entered: DEC 17 2009 2:52:26 PM Last Updated: JAN 7 2010 9:16:13 AM

- Click the **Confirm** button.
- Click the **Payment** button.

Payment Information

Refund Method

- American Express
- Cash
- Cheque
- Coupon
- Diners Club
- Gift In Kind
- MasterCard
- On Account
- Other
- Pass
- Visa

- Choose the Refund Method from the drop down list and enter any other information. Order comments should be entered when refunds are issued indicating the reason for the refund and the supervisor who authorized the refund. This information assists in reviewing the daily activity and insures the refund was processed correctly and was authorized.



NOTE:

To **NOT** refund the Order or Exchange fee, remove them in the Fees window.

- Click the **Accept** button. Theatre Manager returns the ticket for resale and return the user to the Patron Household Window.

Step 3—Purchase a Ticket

Selling a ticket consists of four parts. Each ticket sales is associated to a patron record. Once the Patron is located the event or events the patron wants to purchase for can be selected. Tickets are added to the order and finally a payment is made.

- See [Step 2—Add New Ticket, page 13](#) for the steps on Purchasing a ticket.

Step 3—Book Season

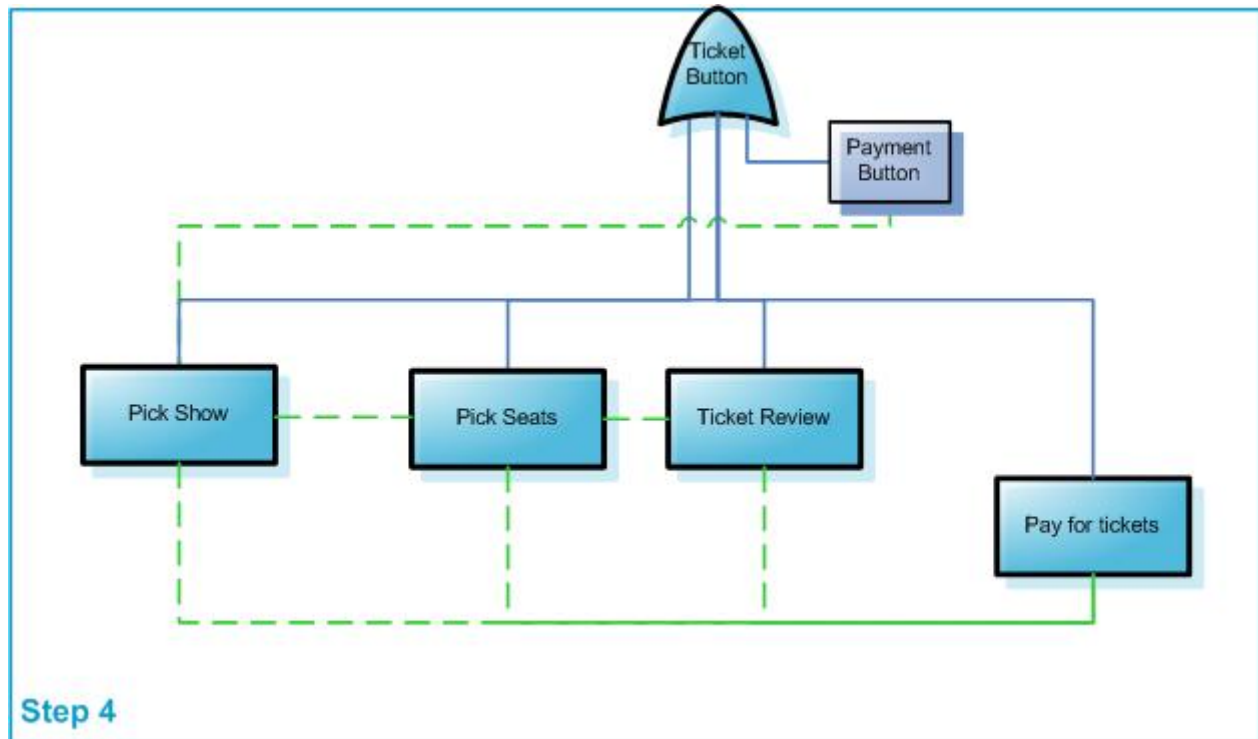
Within the Order window, you can subscribe a patron to a season package and book their seats on the same order with other purchases.

- See page 17 for the steps to Book a Season for a Patron.

Step 4—Patron Makes a Payment For The Order

Payment

Patron makes a Payment for the Order



Step 4—Paying for Tickets

The Basics

You have completed the previous 3 steps:

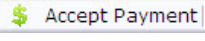
- Step 1--Find the patron.
- Step 1--Select the event.
- Step 1--Add tickets to the order.

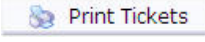
To create the payment:

1. Click the **Payments**  button in the Order window.

The screenshot shows the 'Payment' window with the following details:

- Order Information:** PO Reference # school/group/corp sales, Sold By 12 User Master, Why did Patron buy? Regular Ticket Buyer, Postal Code T3J. A red box labeled '2' highlights the 'Send Invoice' checkbox.
- Payment Information:** A red box labeled '3' highlights the 'Payment Method' dropdown menu, which is open showing options like Cash, Cheque, Coupon, etc. A red box labeled '4' highlights the 'Payment Information' sub-form showing Payment Method: Cash, Payment Amount: \$165.00, Cash Tendered: \$165.00, Foreign Tendered: \$0.00, and Change: \$0.00.
- Ticket Handling:** Options include Hold for Pickup/Taken (selected), Mail to Patron, Hold for WillCall, and Hold @ Door for Coupon.
- Ticket Printing:** Options include Mark Ticket as Printed, Print Address Ticket, Cut each ticket (selected), Cut after last ticket printed for, and Do not cut tickets.
- Order Comments:** Ticket Comment prints on tickets for this ord, Order Notes.
- Buttons:** A red box labeled '5' highlights the 'Accept Payment' and 'Print Tickets' buttons at the bottom right.

2. Enter the appropriate information in the Details Order Information, Ticket Handling, Ticket Printing and Order Comments sections.
3. Choose the Payment Method from the drop down list.
4. Once you have selected the payment method, verify the price and enter the payment details.
5. 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.

Step 4—Making Payments

Using the Payment Window

You use the payment window to:

- Record the payment method.
- Enter a reason why the patron purchased the tickets.
- Initiate invoicing.
- Print tickets.
- Record detailed order notes.

A unique Order Number is generated every time tickets are sold, a donation is made or a membership purchased. This number is displayed on the title bar of the Payment Window.

- For a full description of the Payment window and the Tabs, see [Order Window—Payment Button on page 53](#).

The following expands on the 5 steps in the payment process as described in Payment Basics.


The screenshot shows the 'Payment' window with the following sections and callouts:

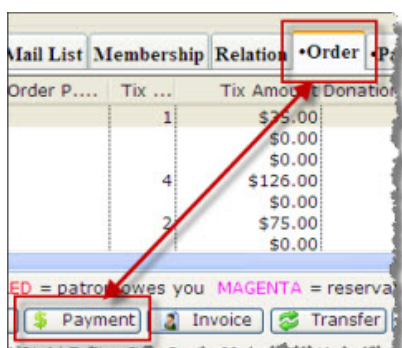
- 1**: Points to the 'Payment' button in the left-hand navigation menu.
- 2**: Points to the 'Ticket Handling' section on the right, which includes options like 'Hold for Pickup/Taken', 'Mail to Patron', 'Hold for WillCall', and 'Hold @ Door for Coupon'.
- 3**: Points to the 'Payment Information' section, which includes fields for 'Payment Method', 'Payment Amount', 'Cash Tendered', 'Foreign Tendered', and 'Change'.
- 4**: Points to the 'Payment Method' dropdown menu.
- 5**: Points to the 'Accept Payment' and 'Print Tickets' buttons at the bottom of the window.

Other sections visible include 'Order Information' (with fields for PO Reference, Sold By, Why did Patron buy?, and Postal Code), 'Ticket Printing' (with options like 'Mark Ticket as Printed', 'Print Address Ticket', 'Cut each ticket', etc.), and 'Payment Source' (with options like 'Internet/Web Sales', 'Telephone Order', 'Mail Order', and 'Patron Present').

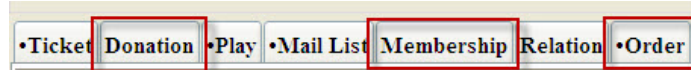
1. Payments can be created for new orders or added to existing orders. There are several ways to access the payment window in Theatre Manager.

1. Getting to the Payment Window

Payment	For a new ticket order, click the Payment button in the Order window.
 Payment	In a Membership or Donation window, you can click the Payment button in the ribbon bar. This opens the Order window to the Payment view.



When a payment needs to be added to an existing order, from the Patron Window, you can select the:




- Donation tab
- Membership tab and
- Order tab

Click the Payment button to opens the Payment for Order number window.

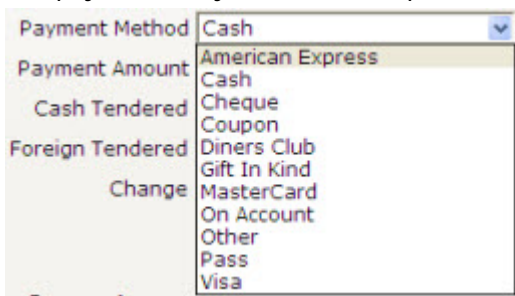
2. Enter the appropriate information in the Details tab. The fields and entry descriptions are as follows:

2. Details Tab

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?	<p>Select the Reason the Patron bought the tickets from the Drop Down list.</p> <p>You use this field to analyze customer purchase behavior by recording how the patron heard about the performances and why they are purchasing tickets.</p> <p>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.</p> <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.

3. 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

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

- Cash, described on [page 42](#)
- Cheque/Check, described on [page 43](#)
- Credit Card, described on [page 43](#)
- Other, described on [page 44](#)

- On Account, described on [page 44](#)

Verify the ticket price. To make changes:

Fee

Click the **Fee** button to add Fees to the Order.

- For more information, see [Order Window—Fee , page 49.](#)

Donation

Click the **Donation** button to add a Donation to the Order.

- For more information, see [Order Window--Donations , page 50.](#)

Membership

Click the **Membership** button to add a Membership to the Order.

- For more information, see [Order Window—Membership , page 51](#)

5. When you have completed entering the information your organization wants to record you can do either of the following to complete your payment.

Accept Payment

Accepts the entered payments. If the order is paid in full the tickets are printed and the order window closes.

Print Tickets

Can be used to print special information on the ticket. For example: birthday wishes, complimentary tickets from.

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. (is this correct?)

Cheque/Check

The patron wants to make their payment with a cheque.

Payment Information	
Payment Method	Cheque
Payment Amount	\$68.40
Cheque #	147
Approval	BK

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.

Payment Information	
Payment Method	Visa
Payment Amount	\$68.40
Credit Card #	swipe/type card # here
Expiry	mm/yyyy
Authorization #	auth code from server
CID #	number on back of card
<input type="checkbox"/> Force Duplicate Transactions	

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**  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

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

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.

Other Payment Information in Online Help

Function	Description	Link to Online Help page
Accepting Multiple Payments	Allows multiple payments to be made by the same patron	Multiple Payments
Adding Later Payments	<p>Later Payments are used to perform a number of important functions such as:</p> <ul style="list-style-type: none"> • Enter payments after the initial sales has been completed • Enter additional payments for an order • Enter reversing payments • Enter post-dated payments • Add/Edit order and exchange fees 	Later Payments
Partial Payments	Partial Payments are directly related to Later Payments. For example, the patron does not pay the full amount for the tickets. You use Later Payments to add future payments to the order	Partial Payments
Contractual Payments	<p>You use Contractual Payments to maintain the order date, deposit date & amount, final payment date & amount, co-payer payment date & amount.</p> <p>For most sales, contractual payments are NOT applicable, however they may be useful for educational or group sales where there is an initial deposit and a final payment due date.</p> <p>You can also use Contractual Payments if a second patron is paying a portion of the ticket order you can track who is to be co-invoiced. (for example - a granting agency for educational tickets)</p>	Contractual Payments
Gift In Kind Payments	Gift in Kind is a donation of gift or services rather than money. For example, the donation of a computer or other office equipment, building materials and paint supplies for props, clothing for wardrobe or the donation of one's time. There is a perceived value for these goods and services which can be considered a donation and are subject to a receipt for tax purposes.	Gift In Kind Payments
Post Dated Payments		
Transferring Payments		Payments - Transferring Payments
	<ul style="list-style-type: none"> • Purchasing - Printing a Payment Receipt • Payments - Deleting Post Dated Payments • Payments - Deleting a Payment • Payments - Reversing Payments 	

Additional Information

Order Window

The Order window displays all information about an Order. The buttons on the left of the window change the view. When a button is clicked the view changes but the order stays the same. This allows for the purchase of tickets, donations and memberships in one order. Once an order is complete it can be opened to view, edit or add payments, purchases, taxes and more.

The screenshot shows the 'Order Window' for 'Order #69 for Mr. & Mrs. (Patron #64)'. The interface includes a ribbon bar at the top with buttons: Help, View, Transfer, Add Play, Remove P., Remove All, Sales Notes, and Sales Performance. On the left is a 'Function Selection' menu with options: Tickets, Fee, Donation, Membership, Season, Payment, Letters, and Transactions. The main area is divided into 'Performance Selection', 'Seat Selection', and 'Ticket Review' tabs. The 'Performance Selection' tab is active, showing a table of performances. A 'Function Display' callout points to the 'Perform...' column. At the bottom left, a summary section shows 'Order Total' as \$0.00. A red callout labeled 'Order Total' points to this summary. The bottom of the window shows a 'Balance Due' of \$0.00.

Play	Perform...	Day	Date	Time	Play Title
08-SM	2-THU	Thursday	Nov 26 2009	2:00 pm	Seussical! the
08-SM	2-FRI	Friday	Nov 27 2009	2:00 pm	Seussical! the
08-TDC	1		Nov 27 2009	7:30 pm	The Drowsy Ch
09-002	1		Nov 27 2009	8:00 pm	NAKED ON THE
08-SM	2		Nov 28 2009	2:00 pm	Seussical! the
08-TDC	1-SAT	Saturday	Nov 28 2009	7:30 pm	The Drowsy Ch
08-SM	2-SAT-M	Saturday	Nov 28 2009	7:30 pm	Seussical! the
09-002	1-SAT	Saturday	Nov 28 2009	8:00 pm	NAKED ON THE
08-SM	2-SUN	Sunday	Nov 29 2009	2:00 pm	Seussical! the
09-002	1-SUN	Sunday	Nov 29 2009	7:30 pm	NAKED ON THE
08-HSM	1-FRI	Friday	Dec 4 2009	2:00 pm	High School M.
08-TDC	2-FRI	Friday	Dec 4 2009	7:30 pm	The Drowsy Ch
08-02	1-FRI	Friday	Dec 4 2009	8:00 pm	ROLLING STON
08-HSM	1-SAT-E	Saturday	Dec 5 2009	2:00 pm	High School M.
08-HSM	1-SAT-M	Saturday	Dec 5 2009	7:30 pm	High School M.
08-TDC	2-SAT	Saturday	Dec 5 2009	7:30 pm	The Drowsy Ch
08-02	1-SAT	Saturday	Dec 5 2009	8:00 pm	ROLLING STON
08-02	1-SUN	Sunday	Dec 6 2009	2:00 pm	High School M.

Ticket Price	\$0.00
Discounts +	\$0.00
Ticket Fee 1 +	\$0.00
Ticket Fee 2 +	\$0.00
Ticket Fee 3 +	\$0.00
Ticket Total	\$0.00
Order Fees +	\$0.00
Donation +	\$0.00
Membership +	\$0.00
City Tax +	\$0.00
State/PST +	\$0.00
Federal/GST +	\$0.00
Order Total	\$0.00
Currency +	\$0.00
Prior +	\$0.00
Future +	\$0.00
Balance Due =	\$0.00

Order Window Buttons (Function Selection)



Tickets	<p>Adds Tickets to the current order.</p> <ul style="list-style-type: none"> For more information on the window, see Order Window—Tickets, page 48.
Fee	<p>Applies Fees to the current order.</p> <p>Fees are extra costs that can be added to an order at various stages throughout its lifecycle. There can be order, exchange, mailing, subscription fees, etc.</p> <ul style="list-style-type: none"> For a description of the fees window, see Order Window—Fee Screen, page 49.
Donation	<p>Adds a Donation to the current order.</p> <p>A Donation would be any item given to an organization without intention of receiving a benefit. Most donors receive a tax receipt for their donation. Donations can be Inserted, Edited, or Deleted depending on the need.</p> <p>For a description of the fee donation window, see Order Window--Donations Screen, page 50</p> <ul style="list-style-type: none"> For more information on Donations see the online help Donations Guide.
Membership	<p>Adds a Membership to the current order.</p> <ul style="list-style-type: none"> For more information on Memberships see the online help Membership Guide.
Season	<p>Adds a subscription to a Season package to the current order. When working in the Order window, it is possible to subscribe a patron to a Season Package, and book the seats for the patron on the same order along with other purchases.</p> <ul style="list-style-type: none"> For more information on Season Subscriptions, see Step 2—Book Season Tickets, page 17.
Payment	<p>Adds a Payment to the current order.</p> <ul style="list-style-type: none"> For more information on Payments, see Error! Not a valid result for table., page 38.
Transactions	<p>Reviews the Transaction details of the order.</p> <p>For a description on the Transactions screen, see Order Window—Transaction Button, page 59.</p> <ul style="list-style-type: none"> For more information on Transactions http://www.theatremanagerhelp.com/theatre-manager-help/Transactions.html

Order Window—Tickets Screen

Performance Selection Tab

Performance Selection

Seat Selection

Ticket Review

Ticket Tabs

Performance Search Bar

Play

From

start search at

To

end search value

Play	Perform...	Day	Date	Time	Play Title	Remain	# Avail	# Sold	# Held (Bo)	# Held(Int)	Sales Met...	Theat
09-C01	SPRING	Friday	Apr 2 2010	8:00 am	CLASS 1	15	15				Festival S...	The
09-D2	1-FRI	Friday	Apr 2 2010	7:30 pm	YOU SAY TOM...	150	160	6	4		Reserved	Dinr
09-D2	1-SAT	Saturday	Apr 3 2010	8:00 pm	YOU SAY TOM...	160	160				Reserved	Dinr
09-D2	1-SUN	Sunday	Apr 4 2010	6:00 pm	YOU SAY TOM...	160	160				Reserved	Dinr
09-H1	H FLAMES	Thursday	Apr 8 2010	7:30 pm	CALGARY FLAM...	3,501					Reserved	Cha
09-C02	SPRING	Friday	Apr 9 2010	8:00 am	CLASS 2	15	15				Festival S...	The
09-D2	2-FRI	Friday	Apr 9 2010	7:30 pm	YOU SAY TOM...	160	160				Reserved	Dinr
09-D2	2-SAT	Saturday	Apr 10 2010	8:00 pm	YOU SAY TOM...	152	160	8			Reserved	Dinr
09-D2	2-SUN	Sunday	Apr 11 2010	6:00 pm	YOU SAY TOM...	158	160	2			Reserved	Dinr
09-C03	SPRING	Friday	Apr 16 2010	8:00 am	CLASS 3	15	15				Festival S...	The
09-D1	1-FRI	Friday	Apr 16 2010	7:30 pm	FIDDLER ON T...	152	160	6	2		Reserved	Dinr
09-D1	1-SAT	Saturday	Apr 17 2010	8:00 pm	FIDDLER ON T...	156	160	4			Reserved	Dinr
09-D1	1-SUN	Sunday	Apr 18 2010	6:00 pm	FIDDLER ON T...	158	160		2		Reserved	Dinr
09-D1	2-FRI	Friday	Apr 23 2010	8:00 pm	FIDDLER ON T...	154	160	4	2		Reserved	Dinr
09-D1	2-SAT	Saturday	Apr 24 2010	6:00 pm	FIDDLER ON T...	147	160	5	8		Reserved	Dinr
09-D1	2-SUN	Sunday	Apr 25 2010	7:30 pm	FIDDLER ON T...	150	160	6	4		Reserved	Dinr

Performance Display

Play	Perform...	Day	Date	Time	Play Title	Sales Met...	Theatre Name (Inte...	Perf # Flag
09-D2	2-SUN	Sunday	Apr 11 2010	6:00 pm	YOU SAY TOM...	Reserved	Prince Theatre	340

Performance Selection Basket

Parts of the window:

- Performance Search Bar

With the Performance Search bar you can refine the list of displayed performances.
- Performance Display

A list of currently offered for sale.
- Performance Selection Basket

When you choose a performance for a patron, it is displayed in the in the lower portion of the screen and is selected for purchasing.

Seat Selection Tab

Performances are displayed in the Performance Selection tab of the Order window. Once a patron is selected and

the **Buy Tickets** button clicked, the performances to be purchased can be selected.

Order Window—Fee Screen

Adds a fee to the current order. Fees are an extra charge that can be added to each Order at various stages through the Order lifecycle.

Order #73 for Smithbuilt Hats (Patron #69)

Help Transfer **New** Open Duplicate Delete Print Export

Tickets

Fee Date

Donation

Membership

Season

Payment

Letters

Transactions

Ticket Price \$0.00
 Discounts - \$0.00
 Ticket Fee 1 + \$0.00
 Ticket Fee 2 + \$0.00
 Ticket Fee 3 + \$0.00
 Ticket Total \$0.00
 Order Fees + \$0.00
 Donation + \$0.00
 Membership + \$0.00
 City Tax + \$0.00
 State/PST + \$0.00
 Federal/GST + \$0.00
 Order Total \$0.00
 Currency + \$0.00
 Prior - \$0.00
 Future - \$0.00
 Balance Due = \$0.00
 Commission \$0.00

Fee Detail - Mailing [Company 1] (inserting)

Help New Save Duplicate Revert Cancel Print Spell Payment

Fees are extra costs that can be added to each Order at various stages in its lifecycle. There can be 'order', 'exchange', 'mailing', 'subscription' fees, etc. In this window, you decide how they are calculated or applied.

Fee Type Mailing

Calculation

Actual Fee Charged

Fee Amount \$5.00
 City \$0.00
 State/PST \$0.00
 Federal/GST \$0.00
 Net Price \$5.00

Default Fee Amounts

Default Amount \$5.00
☒ per Transaction
☐ per Ticket
 to Maximum \$0.00
 Tax Rate None

Calculate Excluding Tax

Once in the Order window, to add fees to a order you would perform the following steps:

1. Click the **Fee**  button. The Fee display opens.



2. Click the **New** button. The Fee Detail window opens.

Fee Type 10 Off

Calculation

Actual Fee C

Fee

10 Off
Exchange
Mailing
Order BoxOffice
Order Subscription
Reprint

- 6. Make the Fee Type selection from the Drop Down list.
- This list can be customized to meet your organization's needs. For information on how to edit the drop down fields, click:
- <http://www.theatremanagerhelp.com/system-preferences-mandatory-data-tab> >System Preferences>Mandatory Data.

7. Click the **Calculate Excluding Tax** button.

- The fees appear in the Order Total portion of the display.

Letters		Entered	Fee	Base Fee	City Tax
Transactions					
Ticket Price	\$0.00	2009 2:57 PM		\$5.00	\$0.00
Discounts -	\$0.00	2009 2:58 PM	Mailing	\$10.00	\$0.00
Ticket Fee 1 +	\$0.00		10 Off		
Ticket Fee 2 +	\$0.00				
Ticket Fee 3 +	\$0.00				
Ticket Total	\$0.00				
Order Fees +	\$-5.00				
Donation +	\$0.00				
Membership +	\$0.00				
City Tax +	\$0.00				
State/PST +	\$0.00				
Federal/GST +	\$0.00				
Order Total	\$-5.00				
Currency +	\$0.00				
Prior -	\$0.00				
Future -	\$0.00				
Balance Due =	\$-5.00				

Order Window--Donations Screen

The following describes how to add a Donation.

1. Click the **Donation** button. The List of the Patron's donations opens.



2. Click the **New** button. The Donation Detail for the Patron selected opens.

Order #73 for Smithbuilt Hats (Patron #69)

Help Transfer **New** Open Duplicate Delete Print Export

Tickets
Fee
Donation
Membership
Season
Payment
Letters
Transactions

Order # Prog... Use Campaign Na... Fiscal Yr Donation Date Pledge Amount Actual Amount Giving Level

Donation Detail for Smithbuilt Hats (Patron #69) [Company 1] (inserting)

Help New Save Duplicate Revert Cancel Print Spell Payment Original Do...

Details Notes Pledge Schedule/Contacts Receipts Soft Credits Matching Gift Transactions

Campaign Annual Dinner Non-Receipt Benefit \$0.00
Date Donated DEC 1 2009 Next Contact NOV 1 2010
Solicitor 12 User Master Program Year 2009
Fiscal Year 2010
Gift With Ticke... \$0.00 <No giving level available>
Total Payments \$0.00 Entered as part of ticket sale
WriteOff Amount \$0.00
☐ Matching Gift ☐ Commission Paid?

Tax Receipt Name Smithbuilt Hats
Program Name Smithbuilt Hats
Sort Name SMITHBUILTTHATS
Receipt Options One per payment
One per payment
One per payment, when fully paid
One per donation when fully paid
Do manually (on typewriter)
Special handling (TM will not print)

Balance Due = \$-5.00
Commission \$0.00
Total tickets reserved so far: 0

RED - patron has not applied full payment to a donation

- For more information on Donations see the online help [Donations Guide](#).

Order Window—Membership Screen

Theatre Manager is a powerful tool for Membership Management. With it, you can:

- Track renewals and expirations
- Create Target marketing.
- View current and potential member listings and
- simplify communications with members.

In the Order screen, you can use the Membership button to add Memberships. Memberships can be used to purchase passes, memberships, vouchers, coupons or other non ticket/donation related items.

For online help sections on the following:

- Member Types [click here](#).
- To learn more about the Membership tab [click here](#).
- For information on accessing a membership [click here](#).

Purchase a Membership

Order #73 for Smithbuilt Hats (Patron #69)

Help Transfer **New** Open Duplicate Delete Print Export

Tickets Order # Year-Fiscal Description Redem... Control # Purchase \$ Issued Pass ... Issued... Remain \$ Ren

Fee

Donation **Membership** Season Payment Letters Transactions

Membership Detail for (Patron #69) {Company 1} (inserting)

Help New **Save** Duplicate Revert Cancel Print Spell Spell Payment Print Pass Renew Cards

Membership Details Notes Redemptions Renew History Letters Transactions

Type **Type** Fiscal Year 2009

Purchase Amount \$0.00

Issue Date DEC 1 2009

Expiry Date

Control # unique control number

Pass Use Method Free admission

Individual Corporate

Source sales source

Member Since

Print Date

Printed By

Play Pass Information

Specify the # of passes issued to the patron if the pass is used to decrease the quantity remaining or dollar value of

Full Issued Amount \$0.00

Issued Passes 0

Used Passes 0 for \$0.00

Remaining Passes 0 worth \$0.00

City 0.00

State/PST 0.00

Federal/GST 0.00

Total 0.00

Hints:

1 Renew a pass if you want to extend the expiry date.

2 Passes may be upgraded or downgraded by changing the type. Renewing the pass and then changing the type means the patron has that new type for the remainder of the time their old pass was valid.

Ticket Price \$0.00

Discounts - \$0.00

Ticket Fee 1 + \$0.00

Ticket Fee 2 + \$0.00

Ticket Fee 3 + \$0.00

Ticket Total \$0.00

Order Fees + \$-5.00

Donation + \$0.00

Membership + \$0.00

City Tax + \$0.00

State/PST + \$0.00

Federal/GST + \$0.00

Order Total \$-5.00

Currency + \$0.00

Prior - \$0.00

Future - \$0.00

Balance Due = \$-5.00

Commission \$0.00

Total tickets reserved

The following describes the Purchase Membership process.

1. In the order window click the **Membership** button. The Membership List window opens.

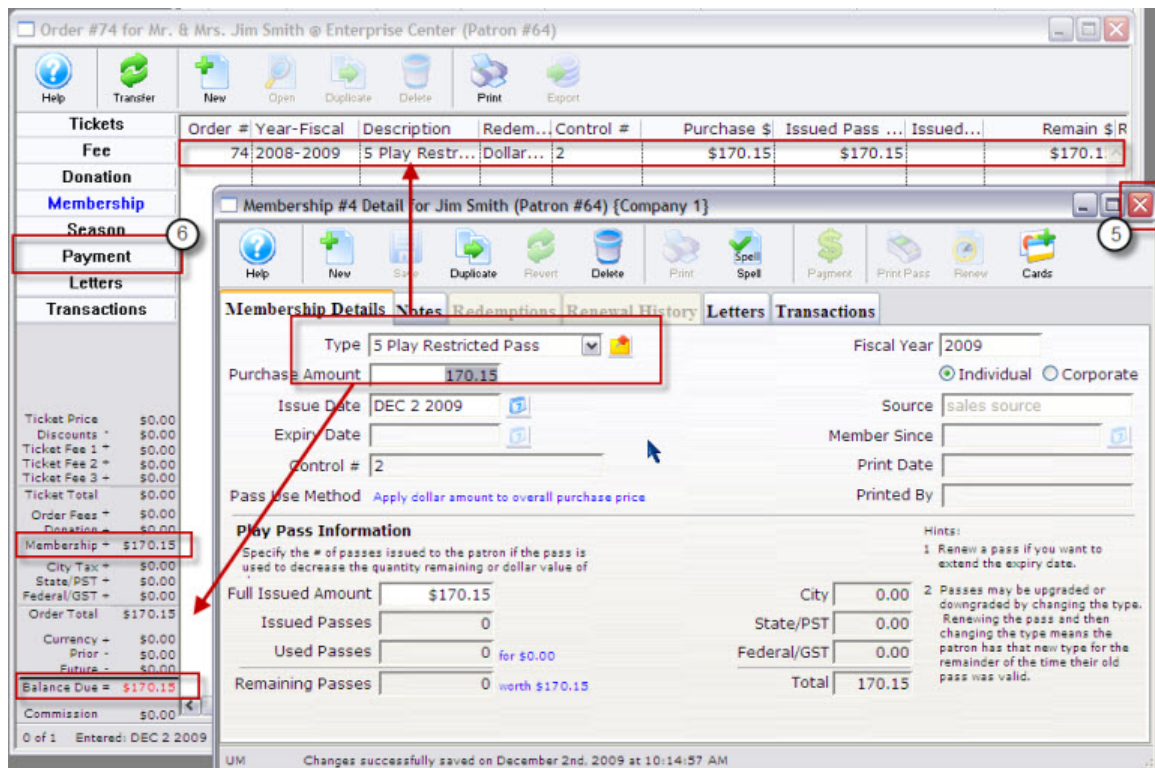


2. Click the **New** button. The Membership Detail window for the current patron opens.
9. Select the type of membership to be purchased from the drop down list. The details of the member type are displayed in the window.



10. Edit the data, as required and click **Save**.

11. Close the Membership Detail window. The Membership has now been added to the order and appears in the Membership section of the Order Detail window.



12. Click the **Payment** button.

- For more information on Payments, see [Step 4—Making Payments, page 39](#).
- Click the **Accept Payment** button or **Print Tickets** button. The tickets and any other items have been purchased. The screen returns to the Patron window.

Order Window—Payment Button

The Payments window is made up of four tabs:

a. Detail	Displays all information for the current purchase and is the main window used to accept simple payments.
b. Create Post Dated	Allows for several future payments to be added to the order
c. Contractual Notes	Lets a patron make a deposit on the order and pay the rest at a later time or to have more then one party make payments on the order
d. Prior Payment.	Displays any payments that have previously been made to the transaction.

Following is a details description of each tab.

a. Details Tab

Order #86 for Ms. Gayle Hunter @ Police Service (Patron #76)

Tickets
Fee
Donation
Membership
Season
Payment
Letters
Transactions

Details **Create Post Dated** **Contractual Notes** **Prior Payments**

Order Information
 PO Reference # ☐ Send Invoice
 Sold By User Master
 Why did Patron buy?
 Postal Code

Payment Information
 Payment Method
 Payment Amount
 Cash Tendered
 Foreign Tendered
 Change

Ticket Handling
☒ Hold for Pickup/Taken
☐ Mail to Patron
☐ Hold for WillCall
☐ Hold @ Door for Coupon

Ticket Printing
☐ Mark Ticket as Printed
☐ Print Address Ticket
☒ Cut each ticket
☐ Cut after last ticket printed for patron
☐ Do not cut tickets


Payment Source
☐ Internet/Web Sales
☐ Telephone Order
☐ Mail Order
☒ Patron Present

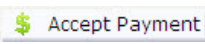
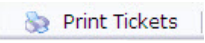
Order Comments
 Ticket Comment
 Order Notes

Accept Payment Print Tickets

UM Changes successfully saved on

	Accepts the entered payment. If the order is paid in full the order window closes without printing tickets in the order.
	Accepts the entered payments. If the order is paid in full the tickets prints and the order window closes.
PO Reference #	Purchase order reference number.
<input type="checkbox"/> Send Invoice	If the order is paid in full an invoice will be sent.
Sold By	The user who was responsible for initiating the sale of the tickets, for example,. a telemarketer.

	The Patron  icon can be used to select an employee code.	
Why did Patron Buy?	Select the most appropriate reason from the drop down list. These values are setup in the Reasons to Buy Tab of Code Tables.	
Payment Information	Payment Method	Method of payment for the order. The values of the list are setup in the Payments Tab of Code Tables.
	Payment Amount	Choose the most method of payment from the Drop Down list. The total the patron is currently paying. Partial Payments can be made as needed.
	Cash Tendered	Enter the amount of Cash paid for the Order.
	Foreign Tendered	Enter the amount of the Foreign Currency entered.
	Change	The Amount of cash to be given back for the Cash payment
Ticket Handling Radio Buttons	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"	Promotions that require coupons in order to be valid
Ticket Printing	Mark Ticket as Printed Check Box	Displays a printed date for the ticket all though the ticket is never printed.
	Print Address Ticket Check Box	Print Address Ticket prints an additional ticket with the patrons address. The default address ticket can be selected under the Ticket Face tab in Company Preferences .
		Print Summary Ticket prints an additional ticket highlighting a summary of the purchase. The default summary ticket can be selected under the Ticket Face tab in Company Preferences
Payment Source Radio Buttons Default fees can be added to these selections	Internet/Web sales	When the transaction is processed over the internet.
	Telephone Order	when the transaction is taken over the telephone.
	Mail Order	The patron mails in the transaction request.
	Patron Present	The patron is in person to make the transaction.
		Accepts the entered payment. If the order is paid in full the order window closes without printing tickets in the order.

	Accepts the entered payments. If the order is paid in full the tickets print and the order window closes.
	Can be used to print special information on the ticket ie. birthday wishes, complimentary tickets from.
Ticket Comment	Any specific notes about the order.
Order Notes	Accepts the post dated payment. The order window closes without printing tickets in the order.

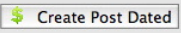
b. Create Post Dated Tab

Order #267 for Blaine Abel @ Port Sign Systems

Help Transfer **Create Post Dated**

Tickets Fees Donations Memberships **Payments** Transactions Overview

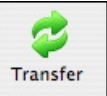

Details **Create Post Dated** Contractual Notes Prior Payments


- Post Dated Payment Amount**
Total Payment Amount
- Post Dated Payment Frequency**
Number of Payments
First Payment Date
Payment Frequency ☐ Weekly ☐ Quarterly ☐ Bi-Weekly ☐ Semi-Annual ☒ Monthly ☐ Annual
- Payment Information**
Payment Method
- Click to Create** 

Date	Amount	Cheque#
APR 17 2007	26.75	

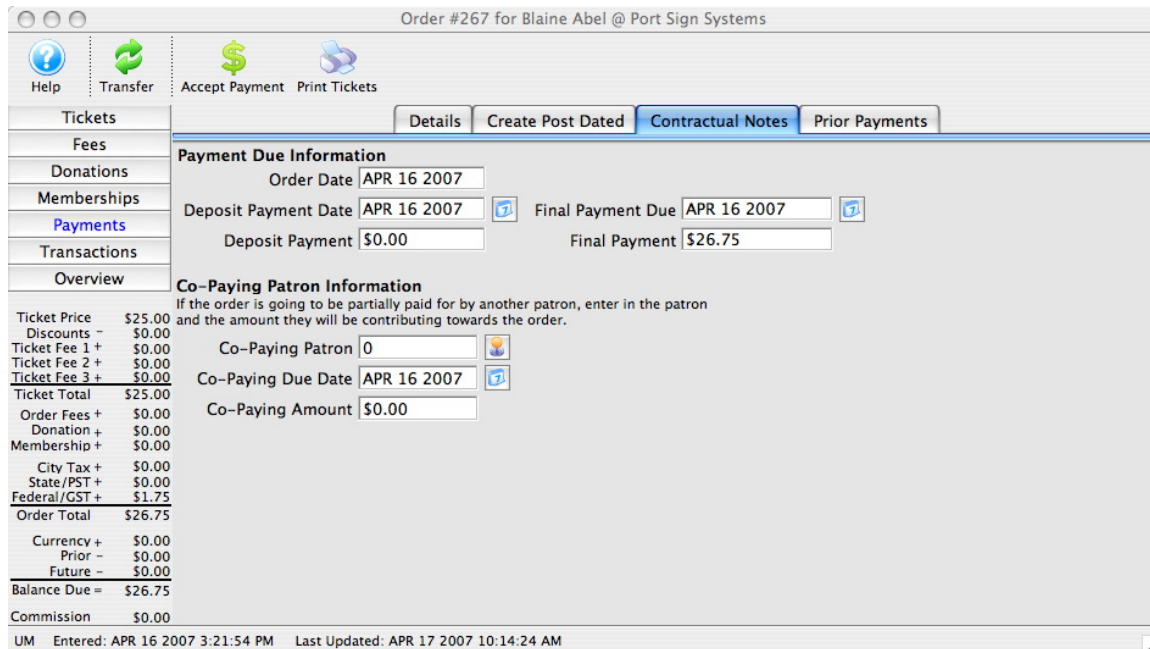
Ticket Price \$25.00
 Discounts - \$0.00
 Ticket Fee 1 + \$0.00
 Ticket Fee 2 + \$0.00
 Ticket Fee 3 + \$0.00
 Ticket Total \$25.00
 Order Fees + \$0.00
 Donation + \$0.00
 Membership + \$0.00
 City Tax + \$0.00
 State/PST + \$0.00
 Federal/GST + \$1.75
 Order Total \$26.75
 Currency + \$0.00
 Prior - \$0.00
 Future - \$0.00
 Balance Due = \$26.75
 Commission \$0.00


UM Entered: APR 16 2007 3:21:54 PM Last Updated: APR 17 2007 10:14:24 AM

	Transfers an order from one patron to another.
	Accepts the post dated payment. The order window closes without printing tickets in the order.
Total Payment Amount	The total which the patron wishes to make post dated payments for.
Number of Payments	Total number of payments to be made.
First Payment Date	The Date the first payment will be made.
Payment Frequency	Periodic times payments will be made.
Payment Method	Method that the payments are to be made. Only credit cards and cheques are accepted.

 Create Post Dated	Accepts the post dated payment. The order window closes without printing tickets in the order.
Date	Date each payment will be received.
Amount	Value of the payment amount to be received on the given date.
Cheque#	The corresponding cheque number for the payment as reference.

c. Contractual Payments Tab



Order Date	Date the order was placed.
Deposit Payment Date	Date the deposit is due.
Deposit Payment	Amount of the deposit.
Final Payment Due	Date the final payment is due.
Final Payment	Amount of the final payment. This is directly based on the total, Deposit Payment and co-paying amount.
Co-Paying Patron	The Patron who is sharing the cost of the order. Click the Patron  icon to open the contact list and select a patron.
Co-Paying Due Date	The date which the co-payment amount is due.
Co-Paying Amount	The amount which the co-payer is paying.

d. Prior Payments Tab

Order #267 for Blaine Abel @ Port Sign Systems

Help Transfer Edit Copy Void Delete Authorize Receipt Print Export

Tickets Fees Donations Memberships **Payments** Transactions Overview

Details Create Post Dated Contractual Notes **Prior Payments**

Order	Date Received	Recd By	Origin	Payment Method	Total Paid	Auth No	Deposit	Outlet-Owner
267	Apr 17 2007	UM	Patron Present	Cash	\$1.50			Arts Mgt Sys
267	Apr 17 2007	UM	Patron Present	Cash	\$1.50			Arts Mgt Sys
267	Apr 17 2007	UM	Telephone Order	Visa Card	\$1.50			Arts Mgt Sys
267	Apr 17 2007	UM	Telephone Order	Visa Card	\$2.50			Arts Mgt Sys

Payment #: 210
Entered Date: APR 17 2007 4:36:44 PM
Received Date: APR 17 2007
Shift #: 0
Order #: 267
Order Date: APR 16 2007
Received By: UM
Payment Origin: Patron Present
Payment Source: Order Modify
G/L Reference:
G/L Account #: 0-0000-000
G/L Account: <Assigned when Deposited>
Deposit #: <Ready to Deposit>
Post Dated A/R: <Not Applicable>
Receipt Printed:

Paid for--> Tickets: \$1.50
Donations: \$0.00
Memberships: \$0.00 0 Qty Redeemed
Fees: \$0.00
Amount: \$1.50

Payment Method: Cash
Cash Tendered: \$1.50 Canada
Foreign Tendered: \$0.00 Canada
Exchange Rate: 1.000000


Ticket Price \$25.00
Discounts - \$0.00
Ticket Fee 1 + \$0.00
Ticket Fee 2 + \$0.00
Ticket Fee 3 + \$0.00
Ticket Total \$25.00
Order Fees + \$0.00
Donation + \$0.00
Membership + \$0.00
City Tax + \$0.00
State/PST + \$0.00
Federal/GST + \$1.75
Order Total \$26.75
Currency + \$0.00
Prior - \$7.00
Future - \$0.00
Balance Due = \$19.75
Commission \$0.00

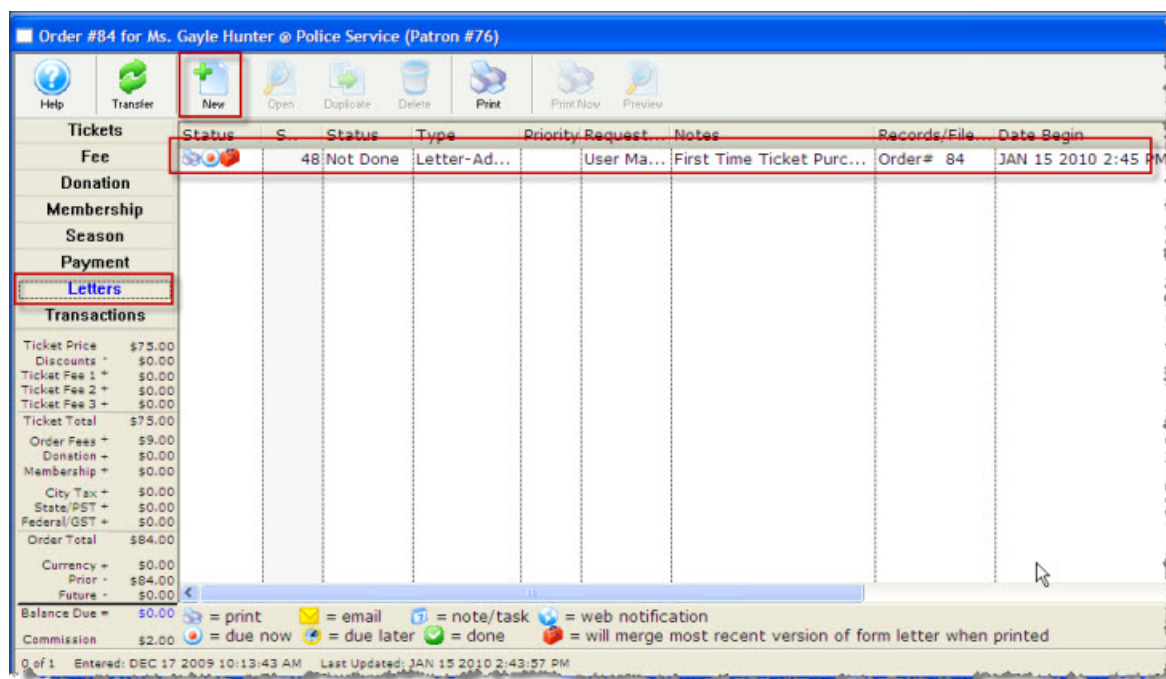
UM Entered: APR 17 2007 4:36:44 PM Last Updated: APR 17 2007 4:42:52 PM



Order	Order number associated with the payment.
Date Received	Date the payment was made.
Recd By	Employee initials who took the payment.
Origin	The payment source.
Payment Method	Method used to make the payment.
Total Paid	Total amount of the payment.
Auth No	Credit card authorization number for credit card payments.
Deposit	Deposit number for the payment.
Outlet-Owner	Outlet the payment was made at.

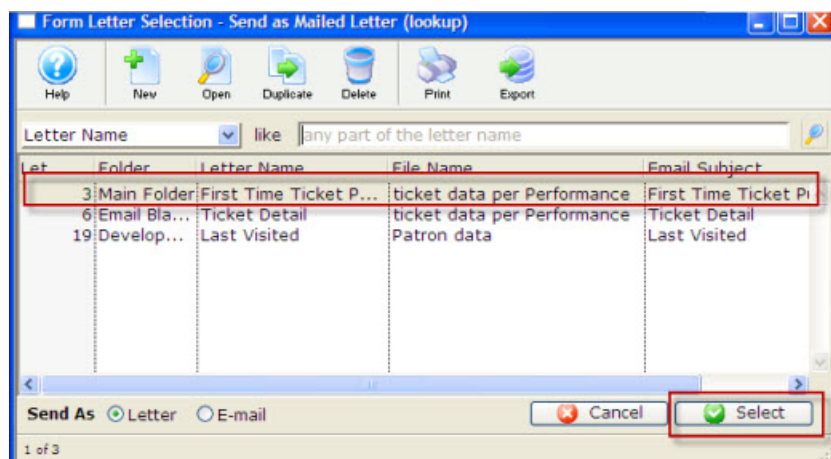
Order Window—Letters Button

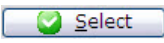
Adds a letter to the current order record.

1. Click the **Letters**  button. The list of a patron's letters associated with the selected order opens.



13. Click the **New**  button. The New Letter  drop down list opens.
2. Make the appropriate selection. The Form Letter Selection Dialog opens.



3. Highlight the Letter you wish to send, and click the **Select**  button.
 4. You are returned to the Letters window and the letter's details are displayed in the Letter window columns.
- For more information on Letters, please see the online help for [Form Letters](#).

Order Window—Transaction Button

The Transaction window displays details of the transaction. These include the date the transaction was create or updated, journal numbers, transaction descriptions and a Theatre Manager code representing the type of transaction.

Use the search drop down to specify the type of transactions to display. Uncheck the include boxes to limit the view of the transaction.

Order #84 for Ms. Gayle Hunter @ Police Service (Patron #76)

Help Transfer New Open Duplicate Delete Print Export Patron Unpost Reverse D... Analyze TS...

Order # From 84 To 84

Include: ☒ Sales ☒ Exchanges ☒ Refunds ☒ Donations ☒ Memberships ☒ Fees ☒ Payments ☒ Non-Financial

Seq #	Trans Date	Journal No	Code	Transaction Desc	Order #	Play	Performance	Type	Description Of Entry	Debit
652	2009/12/17 10:17:42		PT	Payment	84			Cash	Not Deposited	\$80.00
653	2009/12/17 10:17:45		OS	Order Fee Sale	84			~Fees	Order BoxOffice \$5.00	
655	2009/12/17 10:17:49		ZS	Outlet-Ticket sa...	84	08-PO	1-FRI	Outlet #2	Tickets sold for Comp...	\$75.00
657	2009/12/17 10:36:56		ZEF	Outlet-Ticket ex...	84	08-PO	1-FRI	Outlet #2	Tickets sold for Comp...	
659	2009/12/17 10:36:58		ZET	Outlet-Ticket ex...	84	08-PO	2-FRI	Outlet #2	Tickets sold for Comp...	
661	2009/12/17 10:37:00		ZET	Outlet-Ticket ex...	84	08-PO	2-FRI	Outlet #2	Tickets sold for Comp...	
662	2009/12/17 14:21:34		PT	Payment	84			Cash	Not Deposited	\$4.00
663	2009/12/17 14:21:37		OS	Order Fee Sale	84			~Fees	Exchange \$4.00	
									• Total	\$159.00
									• Net Change to A/R	
									• Net Change to A/R o...	\$75.00

Ticket Price \$75.00
 Discounts - \$0.00
 Ticket Fee 1 + \$0.00
 Ticket Fee 2 + \$0.00
 Ticket Fee 3 + \$0.00
 Ticket Total \$75.00
 Order Fees + \$9.00
 Donation + \$0.00
 Membership + \$0.00
 City Tax + \$0.00
 State/PST + \$0.00
 Federal/GST + \$0.00
 Order Total \$84.00
 Currency + \$0.00
 Prior - \$84.00
 Future - \$0.00
 Balance Due = \$0.00
 Commission \$2.00

Additional Information--Parts of the Patron Window's Ticket Tab



a. Ticket Display

This is the portion of the patron window that lets the user examine all of a patron's ticket purchases. The columns display the following information about a patron's tickets:


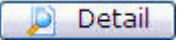
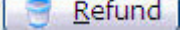
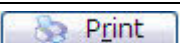
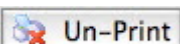

Order #	Reference number for the patron's order.
Play Code	Defines and identifies the event.
Performance Code	Describes which day the event took place on.
Section/Row/Seat	Location of the patron's seat.
Qty	The number of admissions the ticket allows. Theatre Manager allows "Group Tickets" for festival seating events.
Total Cost	The total amount the patron paid for the ticket. The price includes markups, discounts, and taxes.
Pc	Price Code selected when the ticket was purchased.
Promotion	Sales Promotion used when the ticket was purchased.
Date Printed	The Date the ticket was printed.
Performance Date	The date the performance takes place.
Performance Time	Time the performance takes place.
Play Title	The name of the Event
Used?	The status of the ticket can be marked as used if attendance is tracked within Theatre Manager.

A list of items in a particular column can be sorted by clicking on the column heading. The current sort column is highlighted, and a sort icon appears as a small arrow to the right of the column title. The direction of the arrow shows the current sort direction. This changes the order in the other columns.

By double clicking on a particular ticket the user can retrieve more information about that ticket. Double clicking on a ticket opens the ticket detail window.

b. The Ticket Buttons

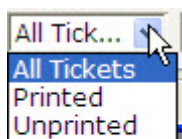
The Ticket Buttons perform the following tasks on the Highlighted tickets:

	Adds tickets to an existing order.
	Opens the ticket transaction.
	Returns tickets back to a sales state and allows a refund or transfer of patrons funds to another form
	Prints unprinted tickets.
	Unprints tickets that already have a printed date.
	Displays a map of the selected Order's seat location.

c. List Restriction Criteria

Over the years, patrons can accumulate numerous ticket transactions. Sifting through them all, even using the Ticket Display Columns can be difficult. These two drop down list boxes allow you to select a different condition criteria for the tickets displayed in the ticket information portion of the patron window.

The choices are:



This drop down list lets you choose to view:

- **All** of the patron's tickets
- Only the patron's **Printed** tickets
- Only the patron's **Unprinted** tickets



This drop down lets you specify a specific date range.

Additional Information—Converting Refunded Tickets into a Donation

A patron may come to you and tell you that they cannot attend an upcoming event and therefore they would like you to refund their tickets, but they also tell you that they would like the company to keep the money as a donation. The following instructions provide an efficient way to perform this task.

1. Open the Patron Record.


5. Select the ticket(s) to be refunded.

Only tickets within the same order can be refunded at the same time.

•Ticket	•Donation	•Play	•Mail List	•Membership	•Relation	•Order	•Payment	•Letter	•Season	•Tran	•Stat
Status	Order #	Play	Performance	Play Title	Section/Row/Seat	Qty	Total Cost	Pc	Promot		
	84	08-PO	2-FRI	Phantom of th...	Orch Ctr Lft/5/FF/15	1	\$37.50	G	Adult		
	84	08-PO	2-FRI	Phantom of th...	Orch Ctr Lft/5/HH/13	1	\$37.50	G	Adult		
	92	09-H2	H STARS	DALLAS STARS	23/B/8	1	\$34.20	S	Subscr		
	92	09-H2	H STARS	DALLAS STARS	23/B/9	1	\$34.20	S	Subscr		

☺ = part of season pkg. BLUE = you owe patron RED = patron owes you MAGENTA = reservation only GRA


Tickets Detail Refund Print Un-Print Map

6. Click the Refund  button. The Order window opens.

Order #92 for Ms. Gayle Hunter @ Police Service (Patron #76)									
Help	Transfer	Detail	Clear	Exchange...	Exchange...	Refund	Print	Print*	UnPrint
<div>Confirm</div>									
<div>Tickets</div> <div>Fee</div> <div>Donation</div> <div>Membership</div> <div>Season</div> <div>Payment</div> <div>Letters</div> <div>Transactions</div>									
<div>Performance Selection</div> <div>Seat Selection</div> <div>Ticket Review</div>									
	Play	Performance	Qty	Pc	Section	Row #	Seat #	Total Cost	Promotion
✗	09-H2	H STARS	1	S	23	B	8	\$34.20	Subscription
✗	09-H2	H STARS	1	S	23	B	9	\$34.20	Subscription

7. Click the Confirm  button.

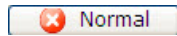
8. The seats refunded are returned to the Box Office and the order now has an outstanding CREDIT balance.

9. Click the Donations  button. The Donation window opens.

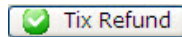
Order #92 for Ms. Gayle Hunter @ Police Service (Patron #76)									
Help	Transfer	New	Open	Duplicate	Delete	Print	Export		
<div> <div>Tickets</div> <div>Fee</div> <div>Donation</div> <div>Membership</div> <div>Season</div> <div>Payment</div> <div>Letters</div> <div>Transactions</div> </div>									
<div>Order # Prog... Use Campaign Na... Fiscal Yr Donation</div>									
<div> <div> <div>!</div> <div> <p>Is this donation a result of returning tickets and would you like one created for \$68.40 to balance the order to zero</p> <p>-or-</p> <p>is this just a normal donation?</p> <div> <div>Normal</div> <div>Tix Refund</div> </div> </div> </div> </div>									



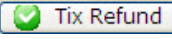
10. Click the **New** button in the ribbon bar. The Donation Default Settings dialog opens and asks *Is this donation a result of returning tickets and would you like one created for \$##.## to balance the order to zero*
or
is this just a normal donation?
You have 2 choices:



Is a NO response to the message



Is a YES response to the message

11. Click the **Tix Refund**  button. A new Donation Detail window opens.

Donation Detail for Gayle Hunter (Patron #76) [Company 1] (inserting)

Help New **Save** Duplicate Revert Cancel Print Spell Payment Original Do...

Details Notes Pledge Schedule/Contacts Receipts Soft Credits Matching Gift Transactions

Campaign Ticket Returns
Date Donated DEC 15 2010
Solicitor 1
Ticket Refund \$75.00 Novas
Total Payments \$0.00 Created during ticket return
WriteOff Amount \$0.00
☐ Matching Gift ☐ Commission Paid?

Non-Receipt Benefit \$0.00
Next Contact NOV 15 2011
Program Year 2010
Fiscal Year 2011

Tax Receipt Name Gayle Hunter
Program Name Gayle Hunter
Sort Name HUNTER|GAYLE|III
Receipt Options One per payment

12. Enter the Donation information. Certain detail information is automatically be inserted by default, for example: Donation Amount and Date Donated.



13. Click the **Save** button. Close the Donation window.

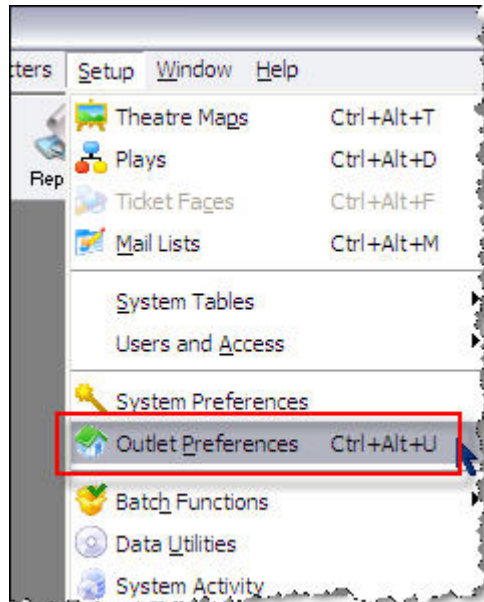
Ticket Price	\$0.00
Discounts	\$0.00
Ticket Fee 1	\$0.00
Ticket Fee 2	\$0.00
Ticket Fee 3	\$0.00
Ticket Total	\$0.00
Order Fees	\$9.00
Donation	\$75.00
Membership	\$0.00
City Tax	\$0.00
State/PST	\$0.00
Federal/GST	\$0.00
Order Total	\$84.00
Currency	\$0.00
Prior	\$84.00
Future	\$0.00
Balance Due	\$0.00
Commission	\$0.00
RED = patron has not applied full paym	
0 of 1 Entered: DEC 17 2009 10:13:43 AM Last Updated: DEC 15 2010	
2 ticket(s) selected, Value: \$75.00	

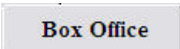
The Order window returns. The balance in the lower left corner is zero.

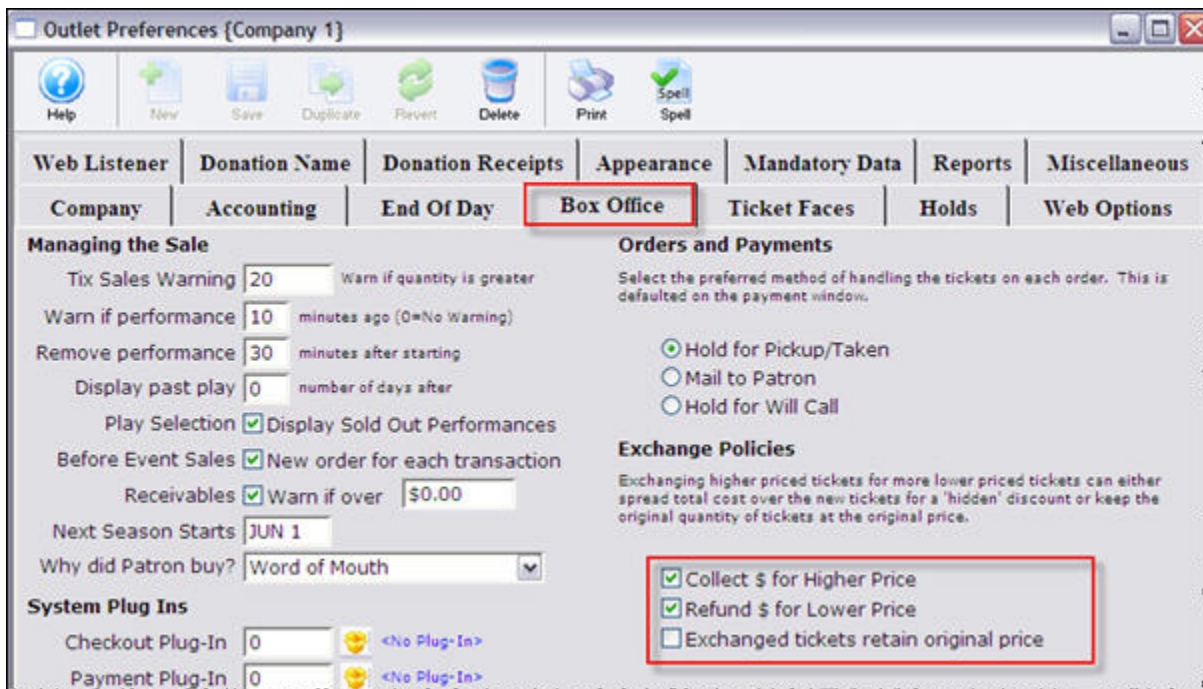
Close the Order window to complete the transaction.

Theatre Manager has now refunded the tickets from the patrons account and converted the value of those tickets into a donation. The tickets have been returned and they can be sold to other patrons.

Additional Information—Viewing Current Exchange Settings



1. Click Setup > Outlet Preferences.
2. Select the Box Office  tab.



Deselect (remove the ✓) **Collect \$ for Higher Price** and **Refund \$ for Lower Price** to automatically waive the price difference in the exchange. You change this setting to allow the employee to choose to waive, collect, or refund the price difference in the exchange.