Before the Trainer Arrives Checklist

Administrator user id and password for the server and workstation(s)

Chart of Accounts (a list of the General Ledger accounts) used to maintain money received from patrons, revenues for events, gift certificates, donations, memberships, tax accounts, etc. ready and available for training

Fiscal Year Starting Month

Venue Maps of the venue(s) (for reserved seat sales) indicating the various sections, rows, and seats numbering patterns. Please ensure that this map is accurate to the actual physical seats in the venue. If you are unsure, please walk to the venue(s) prior to the trainer's arrival.

Brochures (these inform us of pricing options for single and season tickets)

Organizational Chart

Evening contact phone numbers (for data verification questions)

Credit Card Merchant Account Setup Information

Examples of Gift Certificates that you provide patrons

Samples of existing ticket(s) that you are currently providing to the patrons. To assist in designing the new ticket layout, which Theatre Manager will be printing.

Samples of existing reports that you are currently use for event balancing and revenue accounting. These reports will be useful in determining which of the many reports in Theatre Manager are comparable to those you already work with.

A pricing chart of the venue(s) indicating the various price levels based on where the patron sits, "scaled" or "tiered" houses. (if applicable)

A pricing chart for the various ticket prices, including season packages the patron may purchase.

A list of the various sales promotions used for discounting when selling tickets.

A list of the upcoming events (dates and times) and the prices charged to the patrons for each event.

Sample donation thank-you letter, donation solicitation request, pledge payment reminders that you would provide to a donor

Sample marketing letters that you would provide to a patron

After the Trainer Arrives

Often, this is the first time to your facility for our training, giving the trainer a sense of your organization is important. This way, they can get a better sense of how to customize the training to your organization. Some ideas to give them a sense of your organization are:

Location and setup of the box office

Location and walk through of the venue seating location(s)

Locations for other administration staff's offices

Some other helpful locations to know about are:

Location of the training location

Location of a coffee/lunch room area

Location of the water closet

Morning

Meet & Greet

All staff members should attend this important meeting (usually 30-90 minutes)

Have staff bring their goals and hopes for the new software

Arts Management goal is to get you functioning by the end of training

You may not be using all 100% of Theatre Manager by the end of training

Bring forward any changes in the training agenda based on your specific goals

Getting to Know Your Business

Information to have ready is:

Seating chart layouts

Events that you have upcoming

Pricing Information – Price categories, promotions, discounts, zone pricing within the venue

Deferred/Earned Revenue

Breakdown of ticket revenue within the General Ledger

Additional Fees or surcharges that you charge to patrons

Gift Certificates, Memberships, and Passes

Donation Campaigns

Donation Giving Levels

Pricing Strategy

Review the existing pricing strategy for base prices for single, group, season, etc. prices

Review the existing pricing strategy for discounted tickets (2 for 1, 10% discounts, seniors)

Create a crossover spreadsheet on how the existing pricing strategy will be implemented within Theatre Manager's price codes and sales promotions

Data Exporting

Where do we stand on the progress of the data exporting?

Patron Data

Mail Lists

Patron Relationship Data

Media/Press Information

Ticketing Data

Donation Data

Memberships

Outstanding Gift Certificates

Volunteer Information and History of Activities

Any other databases on employee's computers

Exporting final data conversion from existing databases

Data Preparation for Importing

Clarification & preparation of patron data that is required to be imported Note: Training may not occur exactly or in the order shown in these documents

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Afternoon

Installation of the Software

If your organization took advantage of the Remote Installation, the trainer will quickly review the location and setup for each server(s) and less time will be spent on this task.

If the remote installation did not happen, then the trainer will take the time to complete the Remote Installation tasks first, prior to completing the following setup:

Complete hardware inventory (recording IPs, passwords, specifications, etc.)

Installation and configuration of Theatre Manager on each of the workstations

Connectivity testing from workstations to server

Check on status - setup up of sub-domain http://tickets.xxxxxx.yyy

Check on status - router port forwarding 80, 443, 20, 21, 6116 etc.

Check on status - getting SSL confirmation email address

Start – SMTP Mail Server, authentication required?, user id, password

Start - Testing of SMTP Mail Settings to verify that emails can be sent from Theatre Manager

Ensure copies of non-Theatre Manager applications are available (PowerPoint, Excel)

Install Converted Database

Installation and setup of the converted database

Review any imported data for verification of accuracy

Venue Maps

For this training session, it will be important to have at least 1 workstation available that has MS Excel and MS PowerPoint installed on it.

Theory around Price Codes and Sales Promotions

Start creating a Venue Pricing Map

Creation of seat layout

Creation of seat names (section, row and seat descriptions)

Assigning Best Available Seating (to allow Theatre Manager to know exactly the order in which the box office wishes to sell each seat within a venue)

Defining Best Seating Area for patrons to choose from when purchasing tickets via the web

Day 1 Homework

Venue Maps (Box Office)

Cleanup of graphic picture and seat locations within the map

Data Preparation for Importing (Box Office)

Export out all final data from the existing computer system that is required to be imported into Theatre Manager

Reports (Box Office & Development)

If not already provided to the Trainer, Box Office & Development to print out sample copies of common reports from the Prior System they run on a regular basis (end of day, end of end, month end, end of show, etc.)

Also provide the criteria or conditions used to generate the report

Data Importing (Arts Management)

Finalize cleanup of Patron information

Import Patrons