

Day 3 Morning

Your questions

Install Updated Database

- Install updated/data imported database
- Review any imported data for verification of accuracy

Review of Prior Training Topics

- Review of Venue Map setup and default price codes
- Review of Ticket Event Setup process for the event(s) that have been setup
- Review of Pricing Strategy to verify that the "what about this situation of pricing" as been covered. This review is import to reflect back on all possible pricing conditions to make sure that they have been entered into Theatre Manager.

Continue Venue Setup

- Continue creating and additional Venue Maps

Finalize Ticket Event Setup

- Continue creating Ticketing Events
- Continue creating sales promotions, enabling/disabling event sales promotions as required

Continue Setup of System Tables

- Continued setup of General Ledger Accounts
- Final setup of code table values for:
 - Default Posting Accounts
 - Payment Methods
 - Tax Tables
 - Fee Tables
 - Merchant Accounts
- Continued setup of code table values for
 - Reason Why Patron Bought
 - Salutations
 - Suffixes
 - Patron Types
 - Locations, etc.

Day 3

Preparation for Training on Ticket Sales

This setup may be done quickly by the Trainer just to get some information ready for the ticket sales training session. Time has been allocated later in the installation process to cover it in more detail.

- Setup of a donation campaign(s) that would be used by the box office if they received a donation during a ticket sale.
- If applicable, setup of a donation campaign(s) that would be used by the box office if a ticket was returned and converted into a donation rather than refunding the money back to the patron
- Setup of Donation code table for Why Patron Gave (as it relates to the donation)
- Setup of the Gift Certificate.
- If applicable, setup of a Ticket Voucher that would be used by the box office if a ticket was returned and converted into a voucher rather than refunding the money back to the patron

Data Preparation for Importing

- Clarification & preparation of Tickets, Volunteer Data, and any other final data

Day 3 - Afternoon

Employee Setup

- Setup of Employees and Donation Solicitors
- This section is to **"create" employees only** within Theatre Manager's database. The setting of the security levels for what each employee can do and has access to within Theatre Manager's database, is held in a separate training session.

Finalize Installation of the Software/Hardware

Depending on what is outstanding to be setup, it may or may not require the assistance of your IT Department to assist in the completion of some tasks.

- Installation of Theatre Manager's application on all remaining workstations
- Setup and testing of ticket printers
- Setup and testing of credit card swipes (if applicable)
- Setup and testing of bar code scanners (if applicable)
- Testing for sub-domain <http://tickets.xxxxxx.yyy>
- Final setup of Apache with SSL certificate (if purchased through AMS)
- Testing of Web Sales using the standard default pages
- The Trainer will provide some customization to the standard set of web pages based on the venue's existing web site (background/foreground color selections, font and link styles, page header images, etc.)

Meeting with Executive Director - Review of Onsite Training

- Status update of where we are in the training process
- Outstanding tasks that need to be completed
- Missed topics that were part of the base curriculum and reasons why they were missed
- Possible options (cancel future topics, shortened time allocation to future topics, postpone a future topic for another onsite training session in the future) to catch up on any missed topics

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Day 3 - Homework

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 Donation Campaigns, Giving Levels, Donations
- Import Mail Lists, Donation Campaigns, Giving Levels, Donations