Day 4 Morning

Your questions

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Install Updated Database

Install updated/data imported database

Review any imported data for verification of accuracy

Create Training Database

Create a training database to not effect live data

Theatre Manager Introduction

Logging into the database

Toolbar Functionality and Menu Introduction

Patron Management

Finding Existing Patrons

Tricks for searching different ways for patrons

Different Patron Icons

Changing displayed columns, re-ordering the displayed columns

Editing Existing Patrons

Creating New Patrons (multiple address and contact numbers)

Patron Marketing Tabs (Marketing, Profile, Patron, Contacts, Address, Donor, Media)

Patron Contact Flags

Concept of Households versus Patrons (How they are used with each other)

Merging Duplicate Patrons

Merging Patrons into a Common Households, Setting Primary Patrons

Splitting Patrons from a Common Households back into Separate Accounts

Ticket Sales

Single Ticket Sales

Ticket Exchanges

Ticket Quick Change of Price Code and /or Sales Promotion

Ticket Refunds (cash refund, for a donation, for a voucher, for fixing a mistake)

Ticket Fees (Ticket Handling, Mailing Fee, Exchange Fee)

Ticket Fee Setup – Verify they are set correctly and automatically applied

Ticket Holds versus Ticket Timed Holds for Specific Patrons

Inserting a donation and/or Gift Certificate in conjunction with a ticket sale

Group Tickets

Season Ticket Sales (First year only)

Day 4 - Afternoon

Continue on the topics from the prior Ticket Sales session

Donation Receiving with a Ticket Sale

This will only review the process of receiving a donation at the time of a ticket sale. More time in a separate session as been allocated for the full training on the Donation Module.

Receiving a donation at the time of a ticket sale

Turning a returned ticket sale into a Donation, rather than refunding the money

Gift Certificates Selling/Redemption

Selling Gift Certificates

Redeeming Gift Certificates

Turning a returned ticket sale into a Gift Voucher / Certificate, rather than refunding the money

Understanding Accounts Receivable

When to use payment method 'On Account'

Order Reservations (option of Order Reservation and its implications)

Refunding 'On Account'

Buying 'On Account'

Managing A Sale After the Fact

Best Ways to Fix Mistakes that are Identified by the End-Of-Day Process

Adding Payment to An Existing Order

Correcting Ticket Fees within an Order

When to create a New Order versus Editing an Existing Order

Printing Invoices from the Patron window

End of Day Processing

Till Balancing for each employee (Box Office)

Note: Training may not occur exactly or in the order shown in these documents   © 2012, Arts Management Systems

Box Office & Development Reports from Prior System

If not already done, provide the Trainer sample copies of reports and criteria used in the Prior System to generate the reports

Day 4 – Homework

Data Importing (Arts Management)

Finalize cleanup of Tickets information

Finalize cleanup of Volunteer information

Any changes to previously imported data