

Remote Installation of Software Checklist

Check the Setup of Each Computer Before Providing Arts Management Access

- Database Server, Apache Web Server, and Web Listener(s) - Verify Apple/Windows Operating System Auto Updates has been turned OFF
- Database Server, Apache Web Server, and Web Listener(s) - If the Apple/Windows Firewall has been turned on, allow the necessary TCP/IP Port access through for the required Theatre Manager ports
- Database Server, Apache Web Server, and Web Listener(s) - hard drive spin down has been disabled
- Web Listener(s) - Wireless access has been disabled

Logging into the Computers Before Providing Arts Management Access

- Log into the Database Server as the "local" Administrator account. Do not log into the Database Server using the Domain Administrator account as the PostgreSQL database engine requires that the user id being logged in is the Local Administrator account during the installation process.
- Log into the Database Server in 'console' mode. If possible, go directly to the server's main monitor and keyboard and log in. Creating a 'Remote Session' and then providing us remote access to the 'Remote Session' in many cases causes issues during the installation process.
- If it is required to create a RDC session to the Database Server, Apache Web Server, and/or Web Listener Workstation(s), **do not 'Close' or 'Minimize' the RDC session at any time** for it will disable TeamViewer's remote access. You may 'Shrink' the window down and move it out of the way if you desire to use your own terminal for another task and move the RDC connection out of the way.
- Log into the Apache Web Server and Web Listener(s) workstations using the Administrator account. You may log into these computers using the Domain Administrator account and you may use a RDC session if required.

Information to Provide Arts Management

- The Administrator password to access:

Workstation(s)	Password
Database Server	
Apache Web-Server	
Weblistenr	

- If your using TeamViewer:

Workstation(s)	Session Id	Password
Database Server		
Apache Web-Server		
Weblistenr		

Remote Installation Checklist

Installation of the Software

If your organization is taking advantage of the Remote Installation, the following will be done approximately 4 to 7 days prior to the trainers onsite arrival:

- Downloading of all Theatre Manager software applications
- PostgreSQL Database Server
 - Installation and configuration of PostgreSQL Database Server
 - Creation and setup of the Theatre Manager's Demo database
 - Setup of Daily Backup Script for Theatre Manager's database
 - Installation and configuration of Theatre Manager's application
 - Testing connectivity testing between Web Listener workstation(s) and to the Apache Web Server
 - Testing TCP/IP Port 5432 is not being blocked by firewalls
- Apache Web Server
 - Installation and configuration of Apache Web Server
 - Installation of the default set of online web sales pages
 - Testing connectivity to each Web Listener workstation(s) and out to the Internet
 - Installation and configuration of FileZilla FTP Server
 - Testing TCP/IP Port 20, 21, 80, 443, and 5111 are not being blocked by firewalls
 - Starting the process for setup up of the web site ticketing sub-domain <http://tickets.xxxxxx.xxx>
 - Starting the process for setup of the web site ticketing SSL confirmation email address
- Web Listener Workstation
 - Installation and configuration of Theatre Manager's application
 - Testing connectivity testing between Database Server, Apache Web Server, and Internet access
 - Testing TCP/IP Port 5111 is not being blocked by firewalls
 - Network
 - Test the TCP/IP Ports 80, 443 are Port Forwarded to the Apache Web Server
 - Test the TCP/IP Port 6116 is open to outbound

How Long will the Process Take?

In most cases, the remote install will take approximate 4+/- hours to complete, however we would recommend anticipating that we will be spending a good portion of the day not only setting up Theatre Manager, but testing the interaction between the Database Server, Apache Web Server, and Web Listener Workstation(s). The time to complete the upgrade process will depend on:

- Speed of your remote access
- Hardware architecture
- Receiving the required remote access and administrator passwords
- The current state of the network and TCP/IP port settings

Checklist

Two Weeks Prior Checklist

New and Existing Hardware Setup

- Have any new computer workstations or servers setup, configured, and tested for network connections.
- Installation of all Operating System Updates and Patches on:
 - Theatre Manager's Database Server
 - Apache Web Listener
 - Theatre Manager Web Listener workstation(s)
 - All workstations that you intend to have Theatre Manager installed on.
- At minimum, configuration of software based firewalls to allow the required TCP/IP Ports (5432, 6116) for the [Workstation Ports](#)
- Create the DMZ location for the Apache Web Server used exclusively for online web sales

Router

- Refer to [Router Ports](#)
- At minimum, configuration of TCP/IP Port Forwarding for ports 80, 443
- At minimum, configuration of TCP/IP Port 5111 from internal network to Apache Web Server located in the DMZ

One Week Prior Checklist

Prepare the Box Office for Closure

Once your database is sent to AMS for conversion, you will no longer be able to enter ticket sales, donations, or data of any kind. You may use it for reference, but not data entry. If your Box Office is required to be open during this time, please contact Arts Management System's Marketing and Sales Department for further instructions about what you will need to do.

Send your database(s) to Arts Management Systems to start converting

Complete your End of Day in your current software application(s) and send the information to Arts Management you require to be imported into Theatre Manager. The actual date the data is required to be sent, will be provided to you by Arts Management.

Information to Prepare for Day 1 of Training

- 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. This will 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

Before the Trainer Arrives Checklist

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

Day 1

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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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

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

Day 2

Day 2 Morning

Review any questions from Day 1

Install Updated Database

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

Getting to Know Your Business

- Complete any 'getting to know your business' discussions from the prior session

Venue Maps

- Complete venue map(s) creation to a point where they can be used for event creation
- Cleanup of seat square layout (make the map look pretty)

Creating General Ledger

- Theatre Manager's required accounts
- Deferred/Earned accounts

Data Preparation for Importing

- Review the questions from the Arts Management Data Import Team that they may have on your data they are trying to import.
- Clarification & preparation of Events, Performances, Tickets, Mail Lists, and Volunteer information
- Some cleanup of data may be required in an Microsoft Excel spreadsheet containing Event & Performance information. This information will be required to be completed prior to importing any tickets.

Day 2

Day 2 Afternoon

Creating Sales Promotions

- Creation of sales promotions

Creating Events

- Start creating Ticketing Events (when the map has been completed)

Setup of System Tables

There is many areas within the System Tables that will need to be updated. Today's settings will pertain to the ticket selling portion only. Some of the setup will be done by the trainer at this time. Time has been allocated within the schedule to review these tables in more detail.

- System Preferences
- Company Preferences
- Tax Tables
- Payment Methods

Data Preparation for Importing

- Review the questions from the Arts Management Data Import Team that they may have on your data they are trying to import.
- Complete the cleanup of data may be required in an Excel spreadsheet containing Event & Performance information. This information will be **required to be completed prior to importing any tickets.**

Day 2

Day 2 Homework

Venue Maps (Box Office)

- Cleanup of graphic picture and seat locations within the map

Data Preparation for Importing (Box Office)

If the spreadsheet has not been completed, complete the cleanup of data may be required in an Excel spreadsheet containing Event & Performance information. This information will be **required to be completed prior to importing any tickets.**

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 Events, Performances, and Mail Lists
- Import Events and Performances

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

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

Day 4 Morning

Your questions

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

Day 4

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)

Day 4

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

Break

Break

Your questions

NO ONSITE TRAINING

Approximately occurs between Day 4 and Day 5 and could be the Saturday and Sunday

- Although the trainer is not onsite, the trainer is actively completing any outstanding setup items needed for your installation along with coordinating the continuation of the data importing process.
- If there is data importing happening over the break, there will be no live database as the database will be taken offline to complete the data import process. If the database is required to be used during the Break Time to complete outstanding items, please coordinate times with the Data Import Team.
- Please remember that we may be calling the assigned staff member in case the Data Import Team has questions about the data and requires clarification of the data during the Break Time.

Box Office

- Go home to relax as there will be more new information during Day 5 to Day 8, but do not forget the information that was covered during Day 1 to Day 4.
- The box office staff can use this time to catch up on any past work that they are required to do.

Data Importing (Arts Management)

- Import Historical Tickets
- Import Volunteer information and any other data that has been received
- Complete End-Of-Day Processing for Imported Data

Day 5 - Morning

Your questions

Install Updated Database

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

Review of Prior Topics

- Patron Management
- Ticket Sales

Gift Certificates, Memberships, and Passes

- Membership Setup
- Internal vs. External names
- Edits and Controls
- Statistics
- Selling Gift Certificates, Memberships, and Passes
- Redeeming Gift Certificates, Memberships, and Passes

Day 5 – Afternoon

Donation Campaigns

- Internal vs. External names
- Edits and Controls of each Campaign
- Statistics

Donation Giving Levels

- Giving Level Matrix Setup

Day 5

Donation Management

- Introduction to the Donor Marketing Tab
- Entering new donations from the patron window
- Program year versus Fiscal year versus Calendar year
- Matching Gifts & Automatic setup of Matching Gift receivables
- Automatic maintaining of Financial Year for past, current, and future years
- Maintaining Solicitors, and if they received a commission for getting the donation
- Allowing Program Giving Levels to be calculated on donations, soft credits, and/or matching gifts or a combination of them all.
- Customize the donation specific Marketing Fields
- Defaults and customization of Program Names
- Maintaining the next contact date for this patron so the patron can become an annual donor
- Easy maintenance of who your Matching Gift Companies are
- At a glance overview of donor giving history for the past 8 years, averages, maximums, and minimums

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- Program year versus Fiscal year versus Calendar year
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- Easy maintenance of who your Matching Gift Companies are
- At a glance overview of donor giving history for the past 8 years, averages, maximums, and minimums

Word Processing

- Introduction to the new word processing module
- Designating the file used for the letter data
- Creating a form letter

Form Letter Merging

- Assign a Donation Thank You letter to a Specific Donation
- Print out the Donation Thank You Letter

Day 5

Advanced Donation Management

- Printing Donation Receipts (Canadian Clients)
- Developing Pledge Payment Schedules
- Assigning Pledge Payment Reminder Letters
- Sending of Payment Reminders
- To-Do's and Contact Notes
- Allowing multiple Soft Credits per donation
- Easy setting of Relationships between donors
- History tracking of each pledge letter, donation thank you, contact note, and donation tax receipt sent to this patron
- The security options available you can set up for each employee to define what they can and cannot do
- Review of the numerous donation detail, summary, giving trends, giving level, reports geared towards telemarketers, board members, development staff, and management.

Finalize Donation Setup

- Final setup of General Ledger if current, future, or past accounts need to be defined
- Final setup of System Tables

Day 5 – Homework

Box Office

- Box office to complete final changes to venue maps (if no data import tonight)
- Box office to review the standard ticket face to see if any changes are required
- Confirm that all imported patron, mail list, event, performance and ticketing data is complete and accurate

Development

- Development to make any necessary changes to the imported donation campaigns
- Confirm that all imported patron, mail list, relationship, donation data is complete and accurate

Data Importing (Arts Management)

- Any changes to previously imported data

Day 6 - Morning

Your questions

Install Updated Database

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

Review of Prior Topics

- Patron Management
- Ticket Sales
- Donation Management

End of Day Processing

- Till Balancing for each employee (Box Office and Development)
- Creating a Deposit, Sales Posting, and Posting to the General Ledger
- Printing the End-Of-Day Reports

Online Credit Card Payment Server

- Review of Online Credit Card Payment Server Reports
- Settlement of Online Credit Card Payment Server via Theatre Manager
- Forced Deposit Issues (stop, drop, and roll!)
- Management of Online Credit Card Payment Server (Box Office needs easy access)
- Review of Online Credit Card Payment Server manual settlements procedure
- Review of the 4 Major Players Involved with Processing Credit Cards
 - o **Theatre Manager** – entry and collection of data that talks to the Online Credit Card Payment Server
 - o **Online Credit Card Payment Server** – Middleman who receives data from Theatre Manger and communicates with your Service Provider; then communicates back to Theatre Manager.
 - o **Service Provider** – the entity that authorizes the credit card. Do you have their contact information easily available?

Day 6

- **Your Bank** – the location where the Service Provider deposits the money after a successful settlement of the Online Credit Card Payment Server.

Transferring End-Of-Day Activity into Accounting Package

- Theatre Manager is based on Accrual Accounting Principles and as such, all reports for End-Of-Day summary of activity are presented in that fashion.
- Review of Theatre Manager's End-Of-Day Reports to make sure that the selected report to have the Box Office run at the end of each day will provide the information in the best possible layout for the accountant.
- Review of Theatre Manager's Account Receivables Reports

Managing A Sale After the Fact

- Fixing Incorrect Pre-Deposited Payments and Post-Deposited Payments
- Printing an Invoice from the Patron Window
- Printing Invoices from the Batch Functions menu
- Printing an Invoice and Emailing the Invoice to the Patron for the Patron Window

Day 6 – Afternoon

Mail Lists

- Difference between Who (mail list) and What (report)
- Database mining to build Mail Lists
- Adding Specific Patrons to a Mail List
- Removing Specific Patrons from a Mail List
- Using the powerful "Having" button
- Combining various Mail Lists into a single Mail Lists

Label Printing and Exporting Data via Mail Lists

- Printing Address Labels and Envelopes
- Exporting Patron Names & Addresses for External Use
- Printing a Form Letter to be sent to Patrons on a Mail List

Word Processing

This section may not need to be covered again if it was covered during the Donation Management training session.

- Review of the word processing module
- Designating the file used for the letter data
- Creating a form letter

Form Letter Merging

- Merging a Form Letter with a Mail List
- Email Blasts - This will cover only high level overview. More detailed information can be provided if there is time available on Day 8 or during a separate training session (i.e. Follow Up Training)

Day 6

Introduction to Reports

The purpose of this session is not to learn each and every report in Theatre Manager, rather it is used to learn about the Report Criteria Window and how to access the data so you print Theatre Manager's reports.

- Box Office and Donation Reports
- In-depth review of Part of the Criteria Window
- Using Filters to quickly find data base fields
- Saving reports as PDF's for saving on the Server
- Creating Custom Categories
- Saving and using previously saved criteria
- Using the "Test" button
- Running similar reports with the same criteria
- Altering the criteria on the existing data
- Exporting data directly into MS Excel documents
- Producing reports in Theatre Manager that mimic the reports from your prior system (based on the reports that have been supplied to the Trainer)
- Creating criteria for reports that mimic the report criteria from your prior system (based on the reports that have been supplied to the Trainer)

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

Day 6 – Homework

Preparation for Going Live

- Box Office to start entering any sales into Theatre Manager that were received since the Data Import Cutoff Data and have already been reported to the Accounting Department.

Day 7 - Morning

Your questions

Meeting with Web Designer

- Quick introduction with the Web Designer
- Explain the role that they may most likely will be playing within editing of the standard web pages

Online Web Sales

- Review of architecture involved (Apache, Web Listener, Online Credit Card Payment Server)
- Starting/Stopping the Web Sales Listener
- Review the role that the Web Sales Listener plays in tracking all the interaction happening for online web sales
- Starting URL <https://tickets.xxxxxx.yyy>
- Logging into the online web sales module to review the options:
 - Anonymous browsing
 - Creating a new patron account
 - Purchasing Tickets
 - Purchasing Gift Certificates
 - Making a Donation
 - Review of the Shopping Cart
 - Adding oneself to a mail list
 - Updating personal contact information (name, email, address, phone number)
 - Updating personal contact methods (do not mail, do not email)
 - Completing a web order



*In order to get the full experience of what happens online, participants will need to enter in a valid Credit Card to complete their online purchase. Immediately after the training session, any and all credit card authorization(s) created during the training session **will be voided and any item(s) purchased will be cancelled**. Participants should be prepared to have at least one credit card available to complete at least one online web sale order that the group is able to review.*

Day 7

- Emails that are received by the patron during the online shopping experiences - which they can be (and should be) all customized to your venues specific requirements. Think of these emails as a form of advertising.

Web Sales Page Customizations

- Review the location for where the Apache/htdocs is located
- Review the base set of code and html page naming conventions
- Reminder of the importance of 'Clearing Cache' to enable web page changes to take effect
- Provide link to Theatre Manager's online help created specifically for the web developer
- For remote access to the Apache Server by the Web Designer, the IT Department must provide the required access
- For remote access to the Web Listener by the Web Designer, the IT Department must provide the required access



If Arts Management was contracted to perform the Web Sales Customizations, the Trainer will compose a list of the required changes identified during this morning's session. Arts Management will then allocate a separate date and time in the future to complete those changes. This will allow the Trainer to spend the time bringing your staff up to speed on how to use Theatre Manager rather than taking time away from training to complete the Web Sales Customizations.

Day 7 – Afternoon

Web Sales Management

- Starting/Stopping the Web Sales Listener
- Checking for Web Sales Activity
 - Shopping Cart Window Review
 - Review of completed shopping carts
 - Review of in progress shopping carts
 - Review of timeout/cancelled shopping carts
 - Patron window Shopping Cart list
 - Running a report of web sales activity [Order Detail-by Patron (Ticket, Pass, Gift Certificate, Donation, Fee and Payment)]
- Current Internet Holds Window
- Pending Unsent Emails Window
- Web Listener Log Window
- Completing a payment transaction for a patron who doesn't want to enter their credit card number over the internet
- Discussion of what to do with the tickets sold via the Internet
- Discussion of what to do with the Gift Certificates sold via the Internet
- Discussion of what to do with the Donations sold via the Internet
- Set up Work Flow Notifications for Gift Certificates and Donations
- Batch ticket printing for online web sales that are required to be mailed to the patron

Day 7

Updating Theatre Manager for Online Content

- Setting Events available for sale online (immediately, date/time specific)
- Setting Gift Certificates available for sale online
- Setting Donation Campaigns available for sale online
- Setting Sales promotions available for online ticket purchases
- Taking an event/performance off sale immediately
- Defining the maximum number of tickets in a shopping cart, maximum number of tickets for an event, maximum number of tickets for a performance
- Setting of performance notes to show online via the Tickets page
- Setting of event notes and images to show online for event information for the iPhone/iPad application

Web Sales Settings and Procedures

- Review web options available (ask for donation, terms & conditions, showing price code/sales promotion)
- Review the SMTP Mail Server settings in Company Preferences and in Employee Preferences
- How to log in as the web listener user
- Automatically having the web listener log into Theatre Manager upon startup of the computer
- Daily check to make sure web is running and process to follow if it isn't

Day 7 Homework

Box Office

- Continue entering past ticket sales to get all sales up to and including current date

Development

- Continue entering past donations received to get all donations up to and including current date

All Staff

- Continue to explore online web sales

Day 8 - Morning

Your questions

Employee Management

- Defining and setting Employee Security Levels
- Defining and setting Employee Access Restrictions
- Defining and setting Employee Function Restrictions
- Subscribe to Arts Management's RSS Feed via Employee Preferences

Ticket Faces

Any customizations to the ticket faces will be done by the Trainer. The time spent in this section is normally done independently to allow the Trainer to concentrate on completing the changes as quickly as possible.

- Finalize Customization of Event Ticket Faces
- Finalize Customization of Credit Card Receipts
- Finalize Customization of Gift Certificate Tickets

Batch Ticket Printing

- Printing Tickets for mailing
- Printing Tickets the night of the event
- Printing Tickets for web sales

Support for Theatre Manager

- Use Theatre Manager's online help site to first search for your answer
- Subscribe to Arts Management's RSS Feed
- Contacting Arts Management for Technical Support
- Discussion about the difference of Support versus Training
- Process for checking for new updates to Theatre Manager
- Process for installing Theatre Manager on a New Workstation
- Updating Theatre Manager on Existing Workstations (Push Out versus Walk Around)

Day 8

Bringing New Staff Members Onboard

- Existing users should be crossing training new users
- Departing employees should be cross training new employees
- Use Theatre Manager's screen casts from our online help site to train on each section
- Use Theatre Manager's online help site to first search for your answer
- Subscribe to Arts Management's RSS Feed
- Create a Training Database and let the new staff member learn without effecting "live" data
- Optional onsite follow up training
- Optional telephone training

Day 8 – Afternoon

Review of Outstanding Tasks

- Review of what has been completed to date
- Review of the next steps within the process before able to go live with Theatre Manager
- Assigning of responsibility for each of the tasks to get completed
- Determine estimated time for completion for outstanding tasks

Meeting with Executive Director - Review of Onsite Training

- On how training went
- Outstanding tasks that need to be completed
- Missed topics that were part of the base curriculum and reasons why they were missed
- Possible options (future onsite training session, telephone training sessions) to catch up on any missed topics

Open Floor Questions/Review of Prior Topics

- Venue Maps
- Event Management
- Patron Management
- Ticket Sales
- Gift Certificates, Memberships, and Passes
- Donation Management
- End-Of-Day Procedures
- Online Credit Card Payment Server
- Word Processing
- Form Letter Merging
- Mail Lists
- Printing Mail Labels

Day 8

- Reports
- Exporting Patron Names & Addresses for External Use
- Web Sales Management
- Employee Management
- Available time for revisiting a missed session
- Available time for a new session that is not part of the Core Training Curriculum

Onsite Trainer Departs

All the best to all who participated during this training process! The optimum training process and experience is directly related to the effort that each one of the participants put into it on a daily basis.

Day 8 – Homework

Box Office

- Staff to continue entering missed sales since start of data conversion 'cut off' and entering in all new ticket sales

Development

- Staff to continue entering missed donations since start of data conversion 'cut off' and entering in all new donations received

Web Developer

- Complete any requested customized web sales page changes required

All Staff

- Continue to work on all outstanding tasks that were not completed during training.