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Audience1st Customer Management System

A1 Patron Systems, Inc.

January 2008

NOTE: If you're reading this online, click here for a printable version: `manual.pdf`

Contents

1 One-Time Setup: Read Me First

Here's the "quick start" guide to getting your installation configured, once you have received the "green light" from Audience1st. Please follow these steps before trying any of the other system operations.

It's recommended you follow these steps in the order listed.

1.1 Configuration Variables

By default, the system comes with a single customer account whose login is `admin` and password is `admin`. Login using this information to set the configuration variables.

Configuration variables are a set of values specific to each venue that are expected to change very rarely (or never) during routine operations. Hence, there is no built-in link to reach this screen: you must type the URL `http://www.audience1st.com/VENUE/options`, replacing *VENUE* with the "shortname" of your venue as given to you by A1 Patron Systems.[1]

Most of the options are self-explanatory, but the property **External CSS File** deserves separate mention. *Audience1st* uses strict XHTML (Extended HTML) and CSS (Cascading Style Sheets) to control the visual appearance and layout of its pages.[2] While a default "look and feel" is provided, you will probably want to create your own CSS stylesheet so that the *Audience1st* pages match the "look and feel" of your venue's main Web site. You should create this CSS file and host it on your own venue's site, and supply the full URL to the CSS file (e.g., `http://www.mylittletheater.org/stylesheets/my_styles.css`) as the value of this option. A CSS designer can use the information in section **??** to style the site. In the meantime, you can use the value `/default.css` (the initial slash is important) to use *Audience1st* 's default look and feel.

Click Save Changes when you're done; then, *log out* from the built-in `admin` account and log back in using the account you setup with Box Office Manager privilege.

1.2 Create Administrator Account(s)

The built-in `admin` account should be used only for top-level administrative tasks, not day-to-day tasks. Instead, you should next create a Box Office Manager level account for day-to-day administration, as well as (possibly) additional semi-administrative accounts for other staff.

[1] The shortname is a URL-friendly version of your venue's name assigned by A1 Patron Systems; for example, the venue "Silver Star Theater" might have the shortname Altarena+silverstar+. Contact A1 Patron Systems if you're not sure of your venue's shortname.

[2] Currently CSS is the *only* way to change *Audience1st* 's look anad feel. This is hardly a restriction, given the power of CSS; skeptics are invited to examine `csszengarden.com` to get a feel for just how radically different the exact same XHTML can be made to look by changing only the CSS stylesheet.

1. Still logged in as `admin`, use the "Adding a New Patron" feature (see section 3.2.2) to add a patron account for the system's *real* administrator. Grant Box Office Manager privilege to the new user when creating.

2. **Log out**, and then log back in as the new Box Office Manager.

3. Optional: use Add New Patron to create additional accounts for other staff. In general, each account should be created with the least privilege level that will allow the user to accomplish her assigned tasks. See section 2.3 for a description of the available levels.

1.3 Goldstar Events Automatic Processing

If your venue sells tickets through GoldStar Events, Audience1st can be setup to automatically intercept will-call lists from GoldStar and integrate them with your regular lists. (Note that for this feature to work, you must *also* make sure that the appropriate voucher types are setup for the eligible shows; details are in section **??**.)

For this to work, you must arrange for the GoldStar will-call lists to be routed to the email address `goldstar-VENUE@audience1st.com`, where `VENUE` is replaced with your venue name. There's more than one way to do this. The easiest way is to set `goldstar-VENUE@audience1st.com` as the email address for will-call lists—the nice folks at `venues@goldstarevents.com` can help you with this. The more robust and recommended way is to direct GoldStar to send its emails to a designated address at your venue's domain—say, `goldstar-reports@mytheater.org`—and arrange for that address to act as a *reflector* (also called an *alias*) that forwards the email to *both* the Audience1st.com address *and* the personal email address of your House Manager or Managing Director. Why do this? So that if something goes wrong during automatic will-call processing, a human being will still have received a human-readable copy of the GoldStar will-call list. (GoldStar has been known to change the format of their will-call list unannounced, which causes automatic processing to break.)

1.4 Donation Funds

When donations are recorded by backoffice staff, they can be allotted to one or more Donation Funds. By default, the only existing fund is the General Fund. (This is also the fund to which online donations made at the time of ticket purchase always go.) To create an additional fund, use this somewhat roundabout procedure:

1. In the yellow Admin button bar, click *Record Donation*.

2. To the *right* of the Donation Fund dropdown menu, click the *Add New* button.

3. Enter the name and optional account code[3] for the new donation fund.

1.5 Set Up Voucher Types

Most of the existing reports will not be available until at least one Voucher Type is defined. Furthermore, when entering new shows and show dates, you need to associate Voucher Types with each show date. Therefore the next step is to enter at least one or two basic Voucher Types.

From the main navigation tabs, select *Voucher Types*. See section 6.1 for how to add or modify voucher types. You can always add more types later and add newly-defined types to already-entered performances, but enter one or two basic types now, possibly including your Subscription vouchers.

1.6 Set Up Shows and Show Dates

Lastly, set up your shows and show dates. See section 6.3 for instructions. To avoid confusion on the part of your patrons, it's recommended that you enter a show and its showdates all at once. That is, do not enter a show without also entering all its showdates—otherwise, the show will appear as a choice for salable tickets, but no tickets will appear to be available since no show dates have been defined for it.

1.7 Unprotect the Site

Contact A1 Patron Systems to "unprotect" the site (remove the master password that prevents patrons from getting in).

Congratulations—you're live!

[3] Account codes are optional and for your use only; in most generated reports, account codes are produced for aggregate totals, to facilitate exporting the information to your bookkeeping software. Account codes can always be added later if they're not specified initially.

2 System Overview

Throughout this document, wherever VENUE appears in all uppercase, you should substitute for it the name of the venue as encoded by Audience1st for your particular installation.

For example, if your venue is The Little Theater and the Audience1st-assigned name for the venue is `littletheater`, then a URL that appears in this manual as `http://www.audience1st.com/VENUE/store` should be translated to `http://www.audience1st.com/littletheater/store` for use with your venue. You'll most often see this when the manual refers to URL's (Web addresses) or email addresses.

2.1 Patrons, Vouchers, Reservations, Bundles, and Tickets

The *patron* is the unit to which most operations are indexed. Ticket vouchers (see below) are linked to patrons; donations are linked to patrons.

Audience1st operates on the basis of ticket *vouchers*. A voucher is the equivalent of a ticket that can be used to make a reservation—the unit of fulfillment—but the voucher is not itself a reservation. When a reservation is made against a particular voucher, it "ties" the voucher to a specific show date. If the reservation is cancelled, this "tie" is broken but the voucher itself remains, and can in some cases be used for a different reservation later.

Each voucher is of a particular *voucher type*. For each performance (not just each production), the Box Office Manager specifies which Voucher Types may be sold/redeemed for that performance, as well as any applicable capacity controls or restricted sales dates on each type. If a particular voucher type is able to be redeemed for a particular performance under some set of circumstances, we say that it is a *valid voucher* for that performance under those circumstances. In other words, a Valid Voucher is really just a set of conditions that specifies when a particular Voucher Type can be redeemed for a given performance.

A *bundle* is a collection of vouchers sold as a single unit. A simple example is a subscription, which might contain three vouchers valid for any musical and two vouchers valid for any play, or might contain three different vouchers each of which is valid for a performance of one specific production. However, a bundle is not automatically a subscription; bundles can also be used for offering multi-ticket promotions that are not subscriptions. For example, a "family pack" bundle could include 1 adult ticket and 1 child ticket, purchased together for a discount price. Adding a bundle product to a patron's account causes the corresponding individual vouchers to be added to the patron's account, after which point they behave just like regular vouchers. What's the difference between a bundle that is a subscription and one that isn't? The acquisition of a subscription bundle qualifies the patron as a *Subscriber*, and Audience1st allows many operations to distinguish between Subscribers and non-Subscribers. For example, when a new Voucher Type is created, you can specify whether it can be purchased by anyone or only by Subscribers. This makes it easy to offer premium tickets available only for Subscribers, or a variation on general-admission tickets wherein Subscribers can get a discount. Lastly, recall that these distinctions are only for purposes of ticket sales and fulfillment; in terms of tallying your Accounts Receivable, each Voucher Type can be tagged with an Account Code, and rollup reports can be generated based on these keys. So if you want to lump all of your ticket sales (both Subscriber-only and general-availability) into a single income category for accounting purposes, you'll just assign the same Account Code to all those Voucher Types.

Confused yet?

A *ticket* is a special kind of voucher that is "tied" to a particular performance *at the time of purchase*. Generally these are cash purchases by nonsubscribers to attend a particular performance.

Vouchers, bundles and tickets are the *products* offered for sale. Each product can be offered for sale to the general public, to subscribers only, or to box office/administrators only. For example, courtesy tickets could be offered for customer service purposes, but only the box office can add that type of ticket to an account.

2.2 Patron's View

All patrons have accounts by default; the first time someone makes a purchase, Audience1st must collect an email address (to contact them about their order) and a billing address for the credit card, and by simply supplying a password, the patron now has an account (using their email address as the login). Online purchases *require* the patron to give an email address and supply a password.

For phone purchases, a Box Office Associate (BOA) may make a purchase on the patron's behalf. In this scenario, the BOA essentially walks through the same steps the patron would walk through, creating the account and then making the purchase. The BOA can, at her option, inform the patron that in the future the patron may log in using the provided email address and password. (There is an option to leave the login/email address blank when a BOA creates a patron account, recognizing that some patrons phone in because they do not have email access.)

Once logged in, the patron sees a list of all their vouchers. Some vouchers may be marked as "available", meaning they have not yet been "tied" to a performance via a reservation. Clicking on one of these will allow the patron to make a reservation against that voucher. A patron can also cancel a reservation, which makes the voucher available for a different reservation.

Guests without accounts are directed to a *storefront* where specific products are offered for credit card sale. If the patron attempts to purchase a subscription or bundle product, part of the purchase process requires them to create an account.

2.3 Backoffice View

The various administrative users of the system are just patrons who have special privileges. They login and see the same screens that patrons see, but they also have access to certain screens and operations that patrons do not. The levels in order of increasing privilege are:

Patron The default level: can log into her own account, manage her own reservations, and edit her own contact information.

Staff Can also generate reports, including mailing lists, box office statistics, etc. Can record donations, search and update patron contact information, and manage the "Resources" database (patrons who are also professional service providers, professional connections to other organizations, etc.) This is the appropriate category for any staff member who does not deal directly with reservation processing.

Walkup Sales can also do day-of-show box office procedures, such as generating the will-call list, processing walkup sales transactions, and generating the box office settlement report.

Box Office Associate Can also make and cancel advance reservations, search the patron database, update patron information, add and remove vouchers from patron accounts, and generate attendance lists for performances.

Box Office Manager Can add/edit shows, add/edit performance dates, add/edit voucher types and bundle types, determine which voucher types can be redeemed for which performances.

Administrator Can grant/revoke any of the above privileges to other users and perform additional direct manipulation of database tables.

All backoffice actions are *audited*, with permanent records being written of who performed a particular action and when. Thus, it is possible to distinguish (e.g.) whether a patron logged in and changed their own contact information or whether it was changed by a Box Office Agent, and if so, who.

2.3.1 Walkup Sales/Box Office Associate's View

A Box Office worker who handles walkup sales has access to the necessary functions for processing walkups.

A Box Office Associate (BOA) who also works with advance reservations has additional capabilities:

Switch User The BOA can search for a patron by name and then bring up that patron's record. From that point on, the BOA can do anything the patron could do if the patron had logged in themselves.

Edit User: The BOA can edit a patron's contact information or password, edit the private "comments" field (invisible to the patron) in the patron record, or record additional information about conversations or visits with the patron. The BOA can *reset a patron's password*, but neither the BOA nor anyone else can see the current value of a patron's password.

View Transactions: The BOA can view previous reservation/purchase transactions made by or on behalf of that patron.

Record Donations: The BOA can record donations made by the patron.

2.3.2 Box Office Manager's View

The Box Office Manager (BOM) can do everything the BOA can do, and can additionally:

- view a patron's complete donation and purchase history
- Add vouchers to a patron account without collecting payment
- Remove/cancel prepaid vouchers from a patron account

The BOM can also add new shows and show dates. Logically, a *show* is a single production that has a run start date, a run end date, and some other properties. Each show is associated with one or more *show dates*, each of which represents a single performance. In particular, when a reservation is made against a voucher, the reservation ties the voucher to a particular show date.

A show record includes information about the overall production, including:

- Start and end dats
- House capacity

A show date record includes various kinds of information such as:

- Date and time of the performance
- Capacity of the house for the performance (if different from the default house capacity specified in the Show record)
- When to start and stop advance sales for that performance
- Which voucher types are valid for that performance, including the following information for each valid voucher type:
  - limits (if any) on how many vouchers of each types can be redeemed for that performance. For example, you may offer discount seats but allow at most 10 seats per show to be released as discount.
  - Starting and ending date when reservations can be made for a particular show using this voucher type.

- Whether a promo code or password is needed to redeem this voucher type.
- When to start and stop advance sales for this voucher type, if different from the default in the Show Date record. For example, you may wish to allow time-limited access to a discount ticket type, or define a ticket type that is available early to certain groups of customers.
- Who may purchase this type of voucher: anyone may self-purchase, Subscribers only may self-purchase, Box Office agent must handle the purchase, third-party vendor handles the purchase. The last choice is used for automatic integration of tickets offered through third-party outlets such as GoldStar Events or Tix Bay Area.

2.3.3 Administrators' View

An Administrator (admin) can do anything, including assign any of the above privilege levels to other users. Admins can also do operations that are potentially dangerous to the database. For example, permanently deleting a patron is "dangerous" because past donations made by that patron would no longer be linkable to an individual. The administrator is also the only privilege level that can add or remove privilege for other users.

2.4 Basic Navigation: Yellow Means Privilege

The basic navigational aid in *Audience1st* is the use of color.

Elements in *yellow* on the screen are ones that you are seeing because of your administrative privilege, but that a patron would not see.

For example, when a patron views her own account, she has the ability to make or cancel reservations, but *not* the ability to add or remove vouchers from her own account (except by purchasing through the Storefront). Howver, when a Box Office Agent is viewing that same patron's account, a yellow button labeled "Add Vouchers" will be displayed. The yellow means that the patron would not see this element but the box office associate does see it.

The most obvious yellow navigational aid is the *main navigation bar* (navbar), which appears at the top of every screen for backoffice staff but is never seen by patrons. The navbar gives access to the main functions of *Audience1st* : Customers, Reservations and Donations (chapter 3), Shows and Show Dates (chapter 6), Transaction Search (chapter 3), Tickets and Subscription Types (chapter 6), Reports (chapter 4), and a button to Log Out of the system.

2.5 Logging In

All users—patrons or otherwise—see the same interface for logging in. To *login*, go to `http://www.audience1st.com/\venue` and enter your login (email address) and password. Note that since "back office" users are just patrons with extra privilege, backoffice staff wishing to make reservations on behalf of a patron should just login as themselves—not as the patron. Once logged in, they will be able to access accounts of other patrons.

2.6 Test System

There is a *test system* available for backoffice users that allows you to safely do operations on a "sandbox" database that is completely separate from the real database. You need to have a separate login to use the test system (though you can choose to make it the same as your login for the real system).

The test system is for training and testing purposes and is always accessible at `http://www.audience1st.com/\venue-test`. It is protected by a master username and password (which you'll have to enter *before* you see the login screen). Ask your system administrator what the master username and password is.

You can tell when you are using the test system because there will be a bright red border around every page. This border is absent when using the production system.

TBD: how to distinguish build number of development system from build number of production system.

2.7 Direct SQL Access

For administrators who are experienced in the direct use of SQL, access is provided to the raw underlying SQL database for generating arbitrarily complex reports. If you don't know what SQL stands for, this feature's not for you.

To enable raw SQL access, contact Audience1st and let them know the IP address(es) from which you will establish a remote SQL client connection. You will be given a SQL username and password that has only SELECT privilege on your databases. The schema is described in more detail in section **??**. Additional licensing restrictions apply to the use of the raw SQL feature.

2.8 Incorporating Into Your Venue's Web Site

AudienceFirst automatically provides an RSS 2.0-compliant feed of ticket information for upcoming shows at `http://www.audience1st.com/VENUE/store/ticket_rss`. Your patrons can subscribe to this feed directly, or you can display the feed info on your site using (e.g.) the WordPress content management system or any other CMS that has an RSS widget. Each feed item reports on one performance and reports whether it is sold out, nearly sold out (more than 90 percent), or available, as well as whether tickets are available in advance or only at the box office (advance sales have ended).

AudienceFirst also provides a VoiceXML call-in application that speaks this same information to a caller and then hangs up. The information is limited to ticket info for shows between the time of the call and the end of the coming weekend. To connect this feature, users should call ((@@@phone number TBD@@@)), or be forwarded to that number via your call-in switchboard.

3 Box Office Associate's Guide

This chapter covers basic box office procedures including making and cancelling reservations, recording donations, and day-of-show box office procedures (generating attendance lists, etc.). You must have at least Box Office Associate privilege to access these screens and perform these tasks.

3.1 The Patron Database Is Golden

Our list of patron information is one of our biggest assets. A few words about its stewardship are therefore in order.

Mailing addresses: Patron address information is used for doing mailings. When adding or updating a patron record, if you are not sure about a patron's address, leave it blank. *Don't* fill in "N/A" or "Unknown" or something like that; just leave it empty. The same goes for the email address.

First and Last Names: Patron names are used both for mailings and for communication with patrons. If a couple wants to use different first and last names and want to keep their records distinct, then create separate records. If John Smith and Carol Jones are a couple and they're OK having the same last name in our database, "John and Carol" for first name and "Smith" for last name is fine. But if they want their last names distinct, *do not* enter "John/Carol" for first name and "Smith/Jones" for last name—create two separate records.

Shared addresses: Similarly, when two or more patrons share a household, make every effort to ensure that the addresses are really *identical* in the database. In the future, we will have an "address normalizing" function that converts addresses to standard US Postal Service format, but for now, please be aware that to save money on mailings we often perform de-duplication of addresses, which will only work if the addresses are identical.

TBD: Validation of mailing address, de-duplication/merging procedure.

If you make a mistake while entering a transaction, see section 9.2 for common procedures to recover from mistakes.

3.2 Finding, Adding, or Changing Patron Account Info

This section explains how to reach the *main account page* for any patron, or if the patron isn't already in the database, how to create an entry for the patron. If the same patron appears to have multiple entries in your database (perhaps the patron did a self-signup via the Web, and a Box Office Agent separately created an account for the patron), you can merge the duplicate accounts as described in section 3.2.5.

3.2.1 Looking Up a Patron or Determining Whether a Patron is a Subscriber

1. In the master navigation bar, click *Customers & Reservations.*

2. In the *Search/Filter* box, type a single word that would narrow down to the desired patron. (In the future, multi-word and advanced searches will be supported.) This single word (or part of a word) can be something that occurs in the customer's first or last name, address, city, or any other contact info field.

3. If you see a match for the patron in the displayed list, you can click on the green arrow to go to that patron's record. Note that if there are many matches, the "Next Page/Previous Page" links can be used to browse the search results.

4. If you're sure the patron is not in the database, see section 3.2.2 below to add them.

The patron's general information screen shows their contact information, whether they are a subscriber ("Valued Subscriber" appears below their name if so), and what tickets or reservations are currently held for that patron.

3.2.2 Adding a New Patron

1. In the master navigation bar, click *Customers & Reservations.*

2. Scroll to the bottom of the screen and click *New Customer*.

3. *Carefully* fill in the new patron info. You must choose a password for the patron; it's fine to use their last name, but for security purposes it can't be left blank.

4. Once patron info is entered, click the *Create* button and you'll be taken to the (new) patron's account.

Note: Email mailings are handled by a separate system called PHPlist. See section 3.2.6 to understand how it is connected to *Audience1st* .

3.2.3 Changing Patron Information or Password

You can change a patron's contact information, including their login (email address) and password.

Look up the patron (section 3.2.1) and at the bottom of the patron's account page, click *Update Contact Info* or *Change Password* as appropriate. Enter the new information (if changing password, you'll have to type the new password twice, for confirmation).

Note: For security reasons, patron passwords are stored in a one-way hash format, which means that no one, including the administrator of the whole system, can retrieve a patron's password. We can reset the password for them, but we cannot tell them what their current password is.

Note: If the patron's email address has changed, or you want to make changes to the patron's email preferences, you must take additional steps; see section 3.2.6.

3.2.4 "Blacklisting" a Patron From Mailings

If a patron wishes to be removed from our US Mail list, simply edit the patron's contact info (section 3.2.3) and check the "Blacklist (don't include in mailings)" box.

3.2.5 Merging Duplicate Accounts

If two patron accounts appear to be duplicates, they can be merged. When they are merged, all vouchers, reservations, and donations of the two merged accounts are assigned to the single remaining account.

To merge two accounts:

1. Display or search for the two accounts such that both are displayed on the screen at the same time. For example, if the two accounts to be merged share a last name, you could search by that last name.

2. Check the box to the left of each of the *two* patron accounts to be merged. (To merge more than two accounts, you must merge them two at a time).

3. Click the *Merge Selected Accounts* button.

4. On the next screen, for each field of patron information you will select which of the two accounts being merged should be used for that data.

5. When you've selected all the right data, click *Merge*; to exit without doing anything, click *Cancel*.

6. Note that the patron's login (email) and password are among the fields to choose for merging. The only valid login and password for the patron after merging will be whichever login and password you selected on the merge fields screen. If the patron complains of being unable to login, you can reset their password (section 3.2.3).

3.2.6 Managing Patron's Email Preferences

Email blasts are handled by a separate system called PHPlist. Customer records are automatically linked with PHPlist records.

When you enter a new customer: if you supply an email address for the new customer, *Audience1st* will first check whether that email address has already been registered in PHPlist. (Possibly the patron added herself to our email list *before* becoming a full-blown patron.) If yes, then the *Audience1st* patron record will automatically be linked to the corresponding PHPlist record. If no, a new PHPlist record will be created for the patron at the same time that the patron record is entered in *Audience1st* .

When you update a customer's contact info: if the patron has an existing PHPlist record, you will see a button beneath the patron's email address that says *Update Email Prefs*. Clicking this button will open a *new window* and take you directly to the PHPlist record for this customer. On this screen, you can change which email lists the patron is subscribed to, whether the user should receive HTML-formatted emails, and the user's email address.

If you're updating the customer's contact info and you are adding an email address where previously no email address existed for the customer, a new PHPlist record will be created.

Important. The customer's email address as used for email blasts *is distinct from* the customer's login on our system. Suppose Joe Customer's current login on our system is `joe@my.com`, and you receive a request to update Joe's email information. You visit Joe's record, click the *Update Email Prefs* button, and change his email address in PHPlist to `joe@your.org`. From now on, any email blasts that we send will correctly go to `joe@your.org`. But, when Joe wants to login to our system, he will still have to login as `joe@my.com`. If the customer wants the login changed as well, explain that the login is only used to allow them access to the boxoffice system—*not* as the email address to send to. If they still really want the login changed, contact an administrator.

3.3 Non-Revenue Reservations

This section applies to reservations that do not generate income at the time they are placed, including redemption of subscriber vouchers, redemption of Comps, etc.

3.3.1 Making a Reservation

Making a reservation means selecting an available voucher in a patron account and selecting a performance to tie it to. The Box Office Manager sets up which vouchers can be redeemed for which show dates. Possible criteria include:

- Advance sales start and cutoff: reservations can't be made before the start of advance sales or after the cutoff of advance sales.
- Capacity reached for voucher type: Some types of vouchers, such as promos, may be capacity-controlled, e.g. only 20 discount seats can be sold for a given show. Some promo vouchers may not be valid at all for certain shows, e.g. matinee-only vouchers can't be used to reserve for an evening performance.
- Capacity reached for show: the voucher would be valid for the performance, but the performance is sold out.

Suppose patron John Doe has a "valid for any musical" voucher and a "valid for any play" voucher, and wishes to make a reservation for *Urinetown, The Musical.* If John selects the "play" voucher, he will not be able to use it to reserve for *Urinetown*, but if he selects his "musical" voucher, then *Urinetown* will be listed as a choice.

To make a reservation for a patron:

1. Locate the patron record or create a new one if needed (section 3.2).

2. The patron record main screen shows a list of the vouchers in the patron's account. The "redeemed for" column shows what performance each voucher is holding a reservation for. If a given voucher is not currently being used to reserve for a given performance, it is shown as "Available." **Exception:** A "bundle" voucher, such as a subscription, is a placeholder that is not reservable. Instead, the individual vouchers that form part of the bundle appear in the list as reservable.

3. Select an available voucher to use by clicking *Make Reservation* to the right of the voucher.

4. Select a performance from the popup menu. Performances for which the voucher cannot be redeemed are shown in dimmed type and cannot be selected. Each such performance also shows an explanation of why the voucher cannot be redeemed for that performance.

5. Select any special seating needs from the second popup menu.

6. Click *Confirm Reservation* to make the reservation, or *Don't Make Reservation* to cancel the action.

3.3.2 Cancelling a Reservation

Note that a reservation cannot be cancelled if it is later than the cancellation deadline (typically, 1 to 2 hours before curtain).

1. Locate the patron record or create a new one if needed (section 3.2).

2. Identify the voucher in the patron's account whose reservation you want to cancel.

3. Click *Cancel Reservation* to the right of the voucher. A confirmation dialog will ask you to confirm if you really want to do this.

4. The voucher should then reappear as "Available" for future reservations.

3.3.3 Changing a Reservation

A reservation cannot be changed per se. To "change" a reservation, just cancel the original one (section 3.3.2) and make a new one (section 3.3.1).

3.3.4 Adding Vouchers to Patron Account

1. Locate the patron record or create a new one if needed (section 3.2).

2. Click *Add Vouchers.*

3. Enter the number of vouchers and select the voucher type from the popup menu. Note that adding a Bundle type voucher will add the correct number of individual Vouchers in the bundle.

4. Select the appropriate method to indicate how the voucher was acquired (customer purchase, courtesy/comp, etc.)

5. **Important.** If you are entering an order that requires a separate fulfillment step, such as mailing an item to the customer, check the *Fulfillment needed?* box. This way the order will show up on the Unfulfilled Orders report (section 4.4).

6. If necessary, add an optional comment relating to the order. For example, you can use this to enter a check number if the order was paid by check.

3.3.5 Removing Vouchers from a Patron Account

Follow the procedure for making a reservation (section 3.3.1, but instead of clicking *Make Reservation*, click *Remove Voucher*. Note that if the voucher is tied to a reservation, the reservation must be cancelled before the voucher can be removed.

3.3.6 Recording a Donation

1. Locate the patron record or create a new one if needed (section 3.2).

2. Click *Record Donation*.

3. Populate the form with the date of the donation, dollar value or amount of the donation, type of donation, destination for the donation, and any appropriate comments.

4. Note that you can add a new donation type or new fund (destination for the donation) by clicking *Add New* next to "Donation type" or "Donation fund" respectively.

5. Click *Record* to record the donation or *Back* to cancel.

3.3.7 Transaction Search

If you are looking for a transaction associated with a particular patron, the easiest way to find it is:

1. Look up the patron record (section 3.2.1)

2. Click the yellow *List Transactions* button on the patron info screen; it is next to the buttons for *Add Vouchers* and *Record Donations*

3.4 Revenue Sales/Reservations

This section describes how to process purchase of regular (revenue) tickets by phone.

(TBD)

3.5 Day of Show Procedures

3.5.1 Integration With External Ticketing (GoldStar, etc.)

In addition to our own ticket sales, we also offer tickets through certain external resellers such as GoldStar Events. Information about these tickets is normally received from the external vendor and automatically integrated into our system so that it shows up in the Box Office Report.

If a customer claims to have a GoldStar ticket but does not appear on the box office list, see section **??** for how to manually double-check the GoldStar list.

3.5.2 Generating the Box Office Report (Will-Call List)

Since all our ticketing is electronic, the box office report and will-call list are one and the same.

To generate the box office report for a performance:

1. Go to the Reports screen by clicking the Reports button in the navigation bar (see section 2.4.
2. On the Reports screen, look for *Detailed Box Office Report*. From the menu next to that choice, select the show date for which you want a report, and click the *Go* button.

3.5.3 Walkup Sales—Cash, Check, Credit Card

To sell a ticket to a walkup, login to the system using any account that has Walkup Sales privilege or higher, and perform the following:

1. Click the *Walkup Sales* button in the yellow nav bar.
2. On the Walkup Sales screen, select the show and performance date from the dropdown menus.
3. Select the quantity of each ticket type. Note that subscribers who are bringing guests get a 10% discount; this is shown as ticket types "Guest of Subscriber – Adult" and "Guest of Subscriber – Student/Sr". (If the subscriber does not have their subscriber credentials and you prefer to verify that they are indeed a subscriber, check their customer record as described in section 3.2.1.)
4. If the customer wishes to also make a donation, fill in the amount in the Donation field.
5. When all done, click Record Sale.
6. Accept cash or check payment, or if a credit card, run the charge using the blue POS machine. (This will change as soon as our credit card processor provides us with the functionality to integrate our own swipe.)

3.5.4 Walkup Sales—Subscriber Without Reservation

If a season subscriber shows up without a reservation and wants to see the show, use the procedure of section 3.3.1 to enter a reservation against one of their remaining Subscriber vouchers.

If they have no available vouchers valid for this show, they can always purchase tickets at the "Guest of Subscriber" rate for themselves (section 5).

3.5.5 Closing the Box Office

After the box office closes:

1. Any additional walkup sales that were done by cash or check can be entered as a single large Walkup Sales transaction. For example, a single transaction can be entered for 8 adults, 4 seniors and 4 comps that were dealt with as walkups.

2. TBD: How to record the number of no-shows. This capability will be available soon.

4 Staff Guide

The main page of interest to non-boxoffice staff is the Reports page, which can be used to generate reports about donors, orders, show sales, etc. This page is reached by clicking the yellow *Reports* navigation button in the navbar.

4.1 Viewing Subscription Statistics

The top section of the Reports main page summarizes the number of subscribers of each type and the total number of subcribers as of today's date.

The *Download as Excel* button is currently not working, but it will allow a summary of report data to be downloaded as an Excel-compatible file.

4.2 Viewing Attendance Statistics

Attendance statistics come in two flavors. The *summary digest* view shows the total attendance at each performance, optionally broken down by ticket type. The *boxoffice report* view is a detailed list of each patron's name and ticket type for a particular performance, and it is displayed in a decoration-free window designed to be printer-friendly.

For the summary view, select whether you want a summary of All Shows (for this calendar year), Current Show Only (whichever show is currently in production, based on its start and end dates), or Current and Future shows (till the end of this calendar year).

The resulting summary view will show a line per performance with the total attendance for that performance. By clicking the *Show Details* link at the right edge of each line, you can see a breakdown of the ticket sales for that performance by ticket type. The detail view can be made to disappear by clicking *Hide Details*.

4.3 Generating Mailing Lists

To generate a mailing list of all patrons, mark the criteria you want to use:

- Limit to subscribers only: only customers who are subscribers will be included. A customer is a subscriber if her/his account contains any vouchers that are marked as "qualifies buyer as a subscriber" (see section 6.1).

- Only entries with validated US Mail addresses: limits to entries for which the customer address is believed valid. Customer information entered by staff is always marked as valid at the time of entry. Self-entered information (e.g. when customer purchases online) is marked as valid when the credit card transaction succeeds with the customer's address. Use this option if you're generating mailing labels.

- Remove duplicate addresses: consolidates to one entry per household address rather than per person. For example, if we have a husband and wife living at the same address but with separate entries in our database, only one or the other of them will appear in the listing if this option is used. (Currently, there's no way to specify which one it should be.)

- Sort by: if the list needs to be batched by zipcode, choose the first option, which sorts by zipcode and then within each zipcode sorts by last name. The second option sorts the whole list by last name, using zipcode to break ties.

When you've selected the options you want, click *Download Report in Excel Format*, and you should see a dialog box that will allow you to either save the report to your computer or immediately open it in Excel. (The report is actually a CSV or comma-separated values file, which is readable by other programs like Word as well; but Excel is usually the best way to deal with list-like data.)

4.4 Show Orders Needing Fulfillment

Currently there are no options for this report. Clicking this button will show orders for which fulfillment was indicated at the time the order was placed or entered by staff, but for which fulfillment has not occurred.

Note that if the same customer has ordered multiple items, one line per item will be shown on this screen, even if all the items were purchased together. The reason is that a single order may combine items that have different fulfillment requirements and for which fulfillment must therefore be tracked separately.

To mark an item as fulfilled (e.g., the tickets were mailed to the customer), check the box next to that item. When you've checked all the boxes you want to, click the *Mark Checked Items as Fulfilled* button.

Note that it's OK to do this multiple times. That is, if you mark just a couple of items, click the *Mark Checked Items as Fulfilled* button, and the re-run this report, you can still see the remaining unfulfilled orders.

5 Walkup Sales

If you sell tickets at the box office right before showtime, you can use the Walkup Sales capability.

The Walkup Sales functionality can be accessed by any user whose privilege level is "Walkup Sales" or higher.

The key to understanding the design of the Walkup Sales interface is its assumption that you *do not have time to collect* identifying information (i.e. names and addresses) for walkup patrons. All purchases recorded through the Walkup Sales interface are allocated to the **WALKUP CUSTOMER**, a fictitious placeholder customer that cannot be deleted. Furthermore, walkup transactions are marked to distinguish them from advance-sales transactions, so that settlement reports based on night-of-show sales can be easily generated.

Two common scenarios may arise on a show night in which the Walkup Sales interface is not appropriate:

1. For whatever reason, you specifically *do* want to tie a walkup purchase to a particular individual. (Perhaps you have a loyalty program where patrons who see a certain number of shows get one free.) In this case, you must enter it just as you would a phone transaction (section 3.4), presumably while the angry mob waits their turn.

2. A Subscriber without an advance reservation wants to redeem a Subscriber voucher as a walk-up. (Your policy on whether to allow this and how to handle it may vary.) In this case, you must visit the Subscriber's account and place the reservation just as you would for an advance reservation (section **??**). Note that Walkup Sales user privilege specifically allows this operation, for this exact reason.

5.1 Recording Walkup Sales

When you click the *Walkup Sales* tab, a two-column screen will appear. At the top of the leftmost column, you can select a performance date (it defaults to today's date). Beneath that are dropdown menus for *every ticket type allowed for walkup sales.* This is an important point: if a particular (say, discount) ticket type is valid for only certain performances of the run, it *will appear* in the list of choices for walkup sales, and it is *up to the Box Office agent* to enforce policies regarding nonstandard ticket types. This is a deliberate design choice, since it is usually preferable to provide more leeway and allow humans to make choices, especially in the hectic atmosphere of night-of-show sales.

To record a walkup purchase, simply select the correct performance date, then select the number(s) of ticket(s) of each type

6 Box Office Manager's Guide

Whereas Box Office Agents can handle ticket sales and reservations for performances, the Box Office Manager is the one who *causes tickets and reservations to become available* for shows, by entering a show into the system, associating performance dates with it, and indicating what tickets are redeemable for each performance. These steps are collectively called *listing the show*.

In general, listing a show involves three steps:

Add the show Enter the overall information for the show—name, default seating capacity, etc. This step can be skipped if just adding or removing performance dates from an existing show.

Add show dates Associate performance dates with the show (or remove performance dates). Information such as the deadline for advance sales cutoff and the specific house capacity can be overridden for each show date. The show's "opening date" and "closing date" are automatically determined from the earliest and latest showdates.

Indicate valid vouchers Associate particular ticket types (General Admission, Subscriber, etc.) with the performance. *Without this step, the performances are listed but no vouchers can be redeemed or tickets sold for those performances.*

In addition, the Box Office Manager can define new types of vouchers (tickets) such as discount tickets, promotions, limited-capacity tickets, etc. In addition to *regular* vouchers, the Box Office Manager can set up *bundle* vouchers; a bundle is a collection of single tickets that is offered to the customer as a unit, for example, a subscription or series package.

Before listing any shows, it makes sense to define some *voucher types*, which correspond to the types of tickets your venue sells, including both revenue ("single tickets") and subscription vouchers. The next section covers how to set up both regular and bundle vouchers. In general, you would set up most basic voucher types once only, and only occasionally add new voucher types when you want to add a new promotion or ticket type. The subsequent three sections cover the three steps in listing a show: entering show information (section 6.3.1), adding performance dates for a show (section 6.3.2), and indicating voucher validity for each performance date (section **??**).

6.1 Vouchers and Bundles

There are two types of vouchers. A *regular* voucher is a single seat or ticket to a single performance with a price of zero dollars or more. For example, a General Admission seat would be a regular voucher, as would a Staff Comp. A *bundle* is a package that includes several regular vouchers. A subscription is usually one type of bundle, but nonsubscription bundles are also possible; for example, a 2-for-1 promo or kid-free-with-adult promo. To create a bundle, you first have to create the regular vouchers the bundle will contain, so we'll cover that first.

6.1.1 Creating a Regular Voucher Type

When a new voucher type is set up, the following properties must be specified for it:

Name The name that will appear (e.g. in dropdown menus on purchase screens, in reports, etc.) for the voucher; for example, "Adult General Admission" or "Staff Comp". Note that you can change the name at any time in the future without affecting anything except the appearance of menus and reports.

Price The price of this type of voucher. Enter zero for comps. Don't enter a negative number. When a voucher is sold, the sale price is recorded as the value of this property. Note that if you change the sale price of a voucher type, the change applies retroactively to all purchases. So, if you expect to raise General Admission prices, you will need to create a new Voucher Type for the different price in the future. *future* purchases (as you'd expect). (This will change soon, allowing the price paid for vouchers to remain the same even after the voucher type's price is changed.)

Account Code If you use accounting software, you can enter a code here (up to 8 characters) corresponding to the account code you use to track sales of this voucher type. It's OK for multiple voucher types to share an account code; for example, you may have different voucher types for Adult vs. Student general admission, yet the income from both types should be aggregated under the same account code. The account code is used in the Accounting Reports, which break out revenue by production and account number. Obviously, voucher types whose price is zero need not have an account code. You can leave this blank initially and fill it in later, and your reports will still be correct (i.e., changing the account code is retroactive to all vouchers already sold of a particular type).

Important. If you give *any* voucher type an account code, to be consistent you should give *all* voucher types account codes. Otherwise, when generating the accounting report, any voucher types with no account code will silently be excluded from the report.

Not valid before The earliest date on which a voucher of this type can be purchased or redeemed. This allows you to define voucher types far in advance of when they will be offered for sale.

Not valid after A date after which the voucher expires and can no longer be used. Useful for time-limited promotions. When a voucher of a particular type is issued, it "inherits" this expiration date. However, if the Voucher Type's expiration date is changed, the change is *not* applied to Vouchers of that type already issued.

> **Example.** The "General Admission" voucher type is defined with an expiration date of December 31, 2008. All customers purchasing General Admission tickets will get vouchers that expire on that date. When the new season rolls around, the General Admission voucher type's expiration date is changed to December 31, 2009. This later date will apply to any *future* vouchers of this type that are issued, but customers already holding vouchers of this type will still have the old expiration date.

Mail fulfillment needed Check this box if acquisition of the voucher by a patron implies manual fulfillment. This is used by the "Generate Orders Needing Fulfillment" report. You might set this, e.g., for Subscription bundles where you prefer to mail the customer some collaterals. (Note that this doesn't affect the customer's ability to use the voucher—she can make reservations as soon as the voucher is paid for.)

> **Important.** When a bundle voucher is marked as requiring fulfillment, *only* the actual bundle voucher itself—and not the regular vouchers included with it—will appear on the "Orders Needing Fulfillment" report (section 4.4). This is usually what you want, because (e.g.) in the case of a family that buys 2 subscriptions containing 4 tickets each, you will get 2 lines on the fulfillment report rather than $2 + (2 \times 4) = 10$ lines.

Walkup sales allowed Some vouchers can also be sold at the door, e.g. General Admission. Others, such as advance-purchase-only specials, cannot. Only voucher types that have this flag set will appear on the Walk-Up Sales screen (section 5).

> **Note.** You *should not* allow Subscription Bundles to be sold as Walkup, because the Walkup Sales interface does not allow capturing the patron's name and address. Use this field only for voucher types that you're comfortable selling "anonymously".

Is bundle To create a bundle voucher, you must first create all of the individual voucher types that the bundle will contain, *then* create a new Bundle voucher type, then edit it to include the right quantity of each voucher. That's covered in the next section.

Is subscriber Does the purchase of this voucher qualify the purchaser as a "subscriber"? Useful for distinguishing bundles corresponding to subscriptions from bundles corresponding to promos. Note that while you probably only want to set this property for Bundle vouchers, a non-bundle voucher can also be designated as subscriber-qualifying.

Changeable Specifies whether the voucher is tied to a particular show date or can be used to reserve for a variety of dates. This attribute is not directly settable by the BOM; it's set by the system when the voucher is created. Specifically, vouchers that are pre-purchased as part of subscriptions or promos are generally changeable; vouchers corresponding to tickets purchased for a particular performance are generally not.

Comments Any additional comments, seen only by staff when working with reports.

6.1.2 Adding a New Bundle Voucher Type

A bundle is a voucher that cannot itself be "redeemed" for anything but serves as a placeholder. For example, if a patron buys a subscription containing 3 vouchers good for any performance, they would actually see 4 vouchers in their account. The first is a nonredeemable "voucher" that records the type of bundle purchase. The remaining 3 are the actual vouchers that can be redeemed for seats. This makes it easy to figure out how many people took advantage of a particular bundle promotion even if the promotion includes "regular" tickets.

In general, to define a bundle voucher, you *first* have to define the regular vouchers that the bundle is going to include, as described above. Then create a new voucher type and check the "Is Bundle" box, and save the voucher. Next click the *Edit* link next to the newly-created bundle voucher's name, and you will see an "Included Vouchers" panel where you can enter the number of each type of regular vouchers included in the bundle.

6.2 Approaches to Subscriptions

In general, a subscription is just a bundle that qualifies the buyer as a Subscriber. The bundle includes some number of "vouchers" each of which can be used to make a reservation for a season show. However, there's many ways to set up subscriptions, and it's worth understanding the differences before you set one up.

For the purposes of these examples, we'll assume you have a 4-show season in which you present 2 plays and 2 musicals: Deathtrap, Chicago, The Foreigner, and Seussical, in that order.

6.2.1 One of Each Show

The most conventional subscription type gives the subscriber exactly one reservation for each production. In other words, the subscriber cannot choose to use (say) all 4 subscription vouchers to get 4 reservations for the same performance or even for the same production.

To set this up, you'd first create 4 different types of regular vouchers, with names such as *Subscriber - Chicago*, *Subscriber - Seussical*, *Subscriber - Deathtrap*, and *Subscriber - Foreigner*. When you list the shows, you will arrange that only *Subscriber - Chicago* vouchers can be redeemed for Chicago, etc. You then create a bundle *2008 Subscriber* that includes one each of those four vouchers.

In fact, after Deathtrap closes, you could further define another bundle *Late Season* that includes only the 3 remaining shows.

Note that if a single subscriber purchases multiple subscriptions (e.g. a family of 4), the subscription vouchers don't all have to be redeemed together—that is, they can choose to all attend the same show or four different performances.

6.2.2 Limited Flex

Another type of subscription is "Limited Flex". For example, you might separate your shows into categories (say, plays vs. musicals, or dramas vs. comedies) and then setup a voucher good for any show in that category. You could then offer, e.g., a "two from group A and one from group B" mini-subscription, and the two vouchers for group A could be used either for two different productions or for two seats to the same production.

6.2.3 Flex

The "flex pass" type of subscription has been gaining some popularity: the patron receives a fixed number of vouchers to be redeemed however she wants—all at once for a single production, one for each production, etc. Typically these are priced more expensively than regular "one of each" subscriptions but still priced to offer a break compared to buying single tickets.

Lastly, a caveat. It's easy to get carried away with all the flexibility, and having too many types of subscriptions seems to confuse some patrons. Think about one or two easy-to-explain scenarios and stick to them.

TBD: discuss connection between how subscription is setup and whether to use Classic View or Streamlined(?) View for subscriber welcome screen

6.3 Adding Shows and Show Dates

A *show* is a series of 1 or more performances of the same piece. In general, to list a show you must first enter the general information about the production (opening and closing dates, house capacity, etc.), then enter specific information about each show date.

Several default properties apply to the show (production) as a whole, such as the capacity of the house, but can be overridden selectively for individual dates (for example, if you want to hold back house seats on opening night of a performance, you can set this up automatically to reduce the number of tickets allowed to be sold for that performance).

6.3.1 Adding A New Show

The first step is to add a new show (production). Click the Shows nav tab, and click Add New Show. You'll specify the following properties for the new show:

- The show's name.

- The default house capacity for the show. This can be overridden on a per-performance basis, so enter the number that will be "most typical" for your venue for that show.
- The start and end dates of the run. These dates will be used as the "official" start and end dates in emails and other information feeds, even if they don't match up with the earliest and latest performance dates you specify for the show.
- Special notes to patron. When a patron orders tickets or makes a reservation for any performance of this show, they will receive an auto-generated email (provided their patron record has a valid email address on file) confirming this action. Any text you provide here (up to 255 characters) will be included in that email, and clearly identified as "Special notes for (show name)", if any tickets/reservations in their order are for this show.

6.3.2 Adding Show Dates to an Existing Show

The next step is to add show dates for the production. To do this, click on the show's name in the list of all productions (you can get to this list by clicking the Shows navigation tab), and then click the *Add A Performance* button on the Show Details page.

For a new performance, you need to enter these items:

Date and Time The curtain date and curtain time. This information is also used by the External Integration features such as the calendar and RSS feed (see section **??**.

Advance sales stop When do online sales for this performance stop. As you will see, you can also set start/end sales dates for different ticket types for the same performance, but *no* online tickets will be sold after the time specified here, regardless of their individual End Sales deadlines. Note that a Box Office Agent processing phone sales can override this deadline, as do Walkup Sales (section 5) processed at the door.

Max sales Enter a number here to restrict the total number of tickets sold to be something *other* than the house capacity specified for the show as a whole (e.g. to hold back a block of seats to be purchased through a separate channel or as house seats). Enter 0 to make the max sales the same as the house capacity.

> **Note.** The External Integration Tools can be made to actually report a show as "Sold Out" *before* the maximum number of tickets have been sold.

6.4 Managing Voucher Validity For Show Dates

To allow a particular type of voucher (e.g. "General Admission") to be redeemed for a particular performance, you must indicate that it is a *valid voucher* for that performance.

Important..	When a voucher type is first created, it is *not* automatically redeemable for any particular show. Its validity for specific performances *must* be explicitly established as described in this section.

Note that a bundle voucher cannot be made redeemable, but the regular vouchers included in the bundle can be. For example, if a *Family Promo* bundle voucher includes 2 *Adult* and 2 *Child* tickets, the ticket types *Adult* and *Child* can be made redeemable, but the bundle *Family Promo* cannot be.

6.4.1 Adding Valid Vouchers to a Performance

Adding valid voucher types for a performance makes those voucher types available for purchase or reservation for that performance.

To make a particular regular (nonbundle) voucher type valid for redemption to a given performance, first be sure that the voucher type exists (see section 6.1.1) and the show date for which you want to allow redemption exists (see section 6.3.2). Navigate to the list of show dates for the show in question (section 6.3.2.

Next to each show date is the list of voucher types currently redeemable for that performance. (See figure XXX.) If the voucher type you want to make valid for the performance isn't listed there, click *Add New.* (If you *do* see the voucher type listed, but you want to change any validity properties such as redemption limits or sales cutoff, click on the name of the voucher type and see section **??**.)

You must specify the following redemption properties for the voucher:

Voucher type
: Select from the dropdown list of voucher types you've defined. Only nonbundle vouchers will appear in the list.

Max sales
: To limit capacity of this ticket type, enter a number here; for example, you may want to limit Staff Comps redemption to no more than 4 per performance, or you may want to limit the number of discounted tickets sold per performance. Enter 0 for unlimited (i.e., up to the capacity of the house).

Password
: If you enter a password, patrons buying online will be required to enter it ("promo code") to be able to buy that ticket type. You can actually enter multiple promo codes separated by commas if you want to track redemption separately for the same promo offered through different ad channels.

Start sales on
: Enter the earliest date and time at which this type of ticket goes on sale.

End sales — You can either end sales a certain number of hours (decimal points OK) before curtain, or on a specific date and time.

Add ticket type to — Specify whether this valid voucher should be added only for the specific performance or for all performances. (In the future you will be able to select any arbitrary subset of performances to add to.)

Important.	If you specify "Add to All Dates", you probably want to specify the end sales as "hours before curtain", which will then be correctly computed for each show date. If you specify the end sales as a specific date, that *same* date will be the end-sales date for *all* show dates to which it's added.

6.5 Ticketing Strategy Tips

If you have a "signature" show that's expected to anchor your season, you could define the Full (regular) subscription to include that show, but any Short or Late Season subscriptions to exclude it, to maximize your subscriber base.

Using the Advance Sales Start date when setting up valid vouchers allows you to offer benefits to subscribers such as earlier reservations for shows that may sell out.

Using the Advance Sales Stop date allows you to setup time-limited promotions, e.g. "Purchase your tickets by midnight Tuesday for a discount on Friday's show." You would implement this by creating a special Voucher Type for the discounted ticket (e.g. *Early Bird Discount*) and set it up as redeemable for certain performances but with advance sales start/stop dates that are more restrictive than those for your "regular" general admission.

Remember that Subscribers (by definition, anyone who acquires a voucher that has the Is Subscription flag set) are visually identified on the Box Office report (door list) as well as in all displayed customer listings, making it easy to single them out for special treatment.

7 Tracking Donations, Donors, and Prospects

Audience1st is particularly useful not only for tracking your donations and donors, but also for keeping track of your "prospecting activities"—your contacts with individual donors and prospective donors. This section describes how to use these features.

7.1 Donations, Account Codes, and Funds

Recording a donation requires three pieces of information in addition to the amount: the method of payment (cash, in-kind goods or services, Web donation with a credit card, etc.), the fund that receives the donation, and (optionally) the account code.

Payment method Audience1st predefines a set of payment methods, including In-Kind Goods or Services for donations.

Fund You can choose to specify a fund, e.g. if you'd like to separately track donations for different campaigns. Audience1st predefines only the General Fund. To add new funds, click the Donations navigation tab and click the Add/Edit Donation Funds link.

Account Code The account code is optional but may help you reconcile or import Audience1st reports into external bookkeeping software such as QuickBooks. You don't have to setup Account Codes in advance as you do with Donation Funds and other entities; you just enter the account code at the time the donation is recorded. (See below for donations that are automatically recorded as a result of online purchase.)

7.1.1 Manually Recording Donations

To manually record a donation, navigate to the donor's account page (see section 3.2) and in the yellow Admin Navbar, click *Record Donation*. You'll be prompted to enter the donation amount, payment method, destination fund, and optional account code. There's a shortcut next to the Donation Fund menu to let you quickly set up a new target Fund if necessary.

7.1.2 Online Cash Donations

Online donations made through the ticketing self-purchase flow (if enabled) are automatically assigned to the General Fund. The account code for online donations can be specified as part of Configuration Variables 1.1.

7.1.3 Donation Reports

7.2 Prospect Tracking

Audience1st makes it easy to keep notes on each contact with a prospective donor and even receive email reminders when a followup contact is due.

7.2.1 Recording A Visit

7.2.2 Showing Visits Made To A Prospect

7.2.3 Showing Visits Made By A Staff Member

7.2.4 Automatic Visit Follow-Up Email

8 Administrator's Guide

8.1 Privilege Levels of Other Users

8.2 Referential Integrity

In order to maintain referential integrity of the database, deletion actions tend to be destructive and should be used with great care:

- Deleting a customer record deletes *all* vouchers associated with that customer, whether holding a reservation or not.
- Deleting a voucher type or bundle type silently removes *all* vouchers of that type from the accounts of patrons who hold them.
- Deleting a performance removes *all* reservations to that performance.

9 Troubleshooting and Maintenance

9.1 Backups

A1 Patron Systems backs up all Audience1st databases nightly at approximately 3 AM Pacific time. At any given time, the following backups are available:

- Nightly backups for each of the last 30 calendar days
- Monthly backups taken on the first of the month, every month from the past 5 years (or from the beginning of service, whichever is later)

So, for example, on April 4, the following backups will be available: nightly snapshots for any day from March 2 to April 3; and snapshots for April 1, March 1, February 1, January 1, and the first of each previous month up to five years ago (or the beginning of service, whichever is later).

Backups are kept encrypted on Amazon's S3 (Simple Storage Service) which replicates data extensively for reliability. If you use A1 Patron Systems' optional Web Hosting Service, your Web content databases are backed up according to the same schedule.

These backups are intended for disaster recovery, not as an "undo" for user errors. A technical support fee applies to restoring from backup. Furthermore, if restoring from an older backup and the data schema has changed, the data will be provided only as CSV files rather than loaded into the database. Also, if you request old data to be loaded into the database, new data and changes made since the time of the loaded backup will be lost.

9.2 Recovering From Common Mistakes

TBD

9.3 Technical Troubleshooting

TBD