AudienceFirst Customer Management System Reference Guide for Altarena

AudienceFirst LLC

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NOTE: For a printable version of this manual, click here: `manual.pdf`

Contents

1 System Overview

1.1 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.

The *AudienceFirst*operates on the basis of ticket *vouchers*. A voucher is the equivalent of a ticket that can be used to make a reservation, but the voucher is not itself a reservation. The voucher is instead the unit of fulfillment.

A patron who holds a voucher can use it to make a *reservation*. The reservation "ties" the voucher to a specific show date. If the reservation is cancelled, this "tie" is broken but the voucher itself remains, and can be used for a different reservation later.

Each voucher is of a particular *voucher type*, as defined by the *Box Office Manager* (BOM). The BOM indicates which voucher types are valid for a particular performance. Even after a performance is set up and available for reservations, new voucher types can be created and made valid for that performance. If a voucher is able to be redeemed for a particular performance, we say that it is a *valid voucher* for that 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. But 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.

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. Single tickets can be purchased "anonymously", *without* creating a login account; but to purchase any kind of bundle, including a subscription or promo, the patron must have a login.

Vouchers, bundles and tickets are the *products* offered for sale. However, each voucher type, bundle, and ticket type is marked to indicate whether it is 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.

1.2 Patron's View

We distinguish a *patron*, who has an account established in our system, from a *guest*, who does not. An account is necessary in order to purchase subscriptions or bundle promos, but not all patrons have vouchers in their accounts. In other words, our patron list is our "known customer list", but not all patrons are active.

A patron logs in to the *AudienceFirst*using any Web browser. (The first time they do this, their password will have to be setup by a Box Office Associate; the patron can change it herself later.)

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.

1.3 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 and processing walkup sales transactions.

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.

1.3.1 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.

Add Vouchers The BOA can, with some restrictions, add vouchers to a patron account.

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

1.3.2 Box Office Manager's View

The Box Office Manager (BOM) can do everything the BOA can do, and 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 date includes various kinds of information such as:

- Date and time of the performance
- Capacity of the house for the 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, we 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. This feature will be used in the future.

1.3.3 Administrators' View

An Administrator (admin) can do anything, including 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.

1.4 Basic Navigation: Yellow Means Privilege

The basic navigational aid in *AudienceFirst*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 *AudienceFirst*: Customers, Reservations and Donations (chapter 2), Shows and Show Dates (chapter 4), Transaction Search (chapter 2), Tickets and Subscription Types (chapter 4), Reports (chapter 3), and a button to Log Out of the system.

1.5 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.

1.6 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.

1.7 Incorporating Into External Web Site

As a convenience feature, a specific URL of AudienceFirst can be used to get a quick status of whether tickets are available for *this week's* shows. *This week* means "any day between today and next Monday." To do this, fetch from the URL `http://www.audience1st.com/\venue/thisweek`. What will be returned is one or more lines (separated by the Unix newline character `\n`) corresponding to each of this weekend's performances. Each line has the form *ShowName – ShowDate: Disposition* where *ShowName* is the name of the show, *ShowDate* has the form "May 12, 8:00" (i.e., a date and a time in 12-hour format), and *Disposition* is one of the following three strings:

- `SOLD OUT`—the performance is sold out
- `Available`—advance tickets are still available online
- `Available at Box Office only`—there are still seats remaining, but advance sales have ended

In the future this information will be provided in XML format as well. For the time being, the easiest way to include this information in another website would be an IFRAME, e.g.:

```
<IFRAME HREF="http://www.audience1st.com/altarena/thisweek"/>
```

2 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.

2.1 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 6.1 for common procedures to recover from mistakes.

2.2 Finding, Adding, or Changing Patron Account Info

2.2.1 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 2.2.2 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.

2.2.2 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 2.2.6 to understand how it is connected to *AudienceFirst.*

2.2.3 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 2.2.1) 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 2.2.6.

2.2.4 "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 2.2.3) and check the "Blacklist (don't include in mailings)" box.

2.2.5 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 2.2.3).

2.2.6 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, *AudienceFirst*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 *AudienceFirst*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 *AudienceFirst*.

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.

2.3 Reservations

2.3.1 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 2.2).
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.

2.3.2 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 2.2).
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.

2.3.3 Changing a Reservation

A reservation cannot be changed per se. To "change" a reservation, just cancel the original one (section 2.3.2) and make a new one (section 2.3.1).

2.3.4 Adding Vouchers to Patron Account

1. Locate the patron record or create a new one if needed (section 2.2).
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 3.4).
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.

2.3.5 Removing Vouchers from a Patron Account

Follow the procedure for making a reservation (section 2.3.1, 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.

2.3.6 Recording a Donation

1. Locate the patron record or create a new one if needed (section 2.2).
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.

2.3.7 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 2.2.1)
2. Click the yellow *List Transactions* button on the patron info screen; it is next to the buttons for *Add Vouchers* and *Record Donations*

2.4 Day of Show Procedures

2.4.1 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 6.3.1 for how to manually double-check the GoldStar list.

2.4.2 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 1.4.
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.

2.4.3 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 2.2.1.)
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.)

2.4.4 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 2.3.1 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 **??**).

2.4.5 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.

3 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.

3.1 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.

3.2 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*.

3.3 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 4.1).

- 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.)

3.4 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.

4 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. The general process of entering a show into the system, associating performance dates with it, and indicating what tickets are redeemable for each performance is collectively called *listing the show*.

It's important to realize that, in general, listing a show can involve up to four steps:

Add the show Enter the overall information for the show—start and end dates, 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.

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 for them.*

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.

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 4.2.1), adding performance dates for a show (section 4.2.3), and indicating voucher validity for each performance date (section 4.4).

4.1 Vouchers and Bundles

There are two types of vouchers. A *regular* voucher is a single seat or ticket to a single performance. A *bundle* is a package that includes several regular vouchers. For example, we may offer a special 2-for-1 promo or kid-free-with-adult promo that is limited to specific performances; to implement this you would create a new voucher type representing this promo and then mark the voucher type as valid only for certain performances.

4.1.1 Creating a New Regular Voucher

When a new voucher type is set up, whether or not it is a bundle, additional properties can be specified for it:

Expiration A date after which the voucher expires and can no longer be used. Useful for time-limited promotions.

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; however, 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.

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4.1.2 Adding a New Bundle Voucher Type

A bundle is itself a voucher that cannot 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.

(To be written)

4.2 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.

4.2.1 Creating Shows

4.2.2 Changing Show Details

4.2.3 Adding Show Dates

4.3 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.

4.4 Setting What Tickets Can Be Redeemed for a Performance

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.

4.4.1 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 4.1.1) and the show date for which you want to allow redemption exists (see section 4.2.3). Navigate to the list of show dates for the show in question (section 4.2.3.

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 4.4.2.)

4.4.2 Changing Existing Valid Vouchers

To be written

5 Administrator's Guide

5.1 Privilege Levels of Other Users

5.2 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.

6 Troubleshooting

6.1 Recovering From Common Mistakes

TBD

6.2 Technical Troubleshooting

TBD

Appendix: Additional Procedures For Altarena

NOTE: For security reasons, some passwords are not listed in this document. There is a list of relevant passwords posted in the boxoffice.

6.3 Day-of-Show Problems

6.3.1 Manually Check GoldStar Sales

If the walkup list doesn't show any GoldStar customers, but you have customers who claim they *did* purchase from GoldStar, you can manually check the GoldStar list in case there was some problem importing the list into Audience1st.

1. Go to the GoldStar supplier page at http://www.goldstarevents.com/supplier
2. If a username/password is needed, use username *altarena* and password *shore*.
3. Click on *Recent Will-Calls*.
4. Click on the appropriate date. Usually there are options for either PDF or Excel download; usually PDF works better, but you can try both.

6.3.2 Can't Login to Audience1st

The following additional people have logins on Audience1st: Corinne Minton, House Manager; all Board members.

There is also a "generic" boxoffice account that is authorized for walkup sales ONLY, and only from the computers in the boxoffice. Its username and password are posted in the boxoffice.

6.4 Process Only a Credit Card Charge When No Card Present

At the moment, we can use the blue POS terminal to swipe credit cards for arbitrary amounts. However, if you need to process a card-not-present (e.g. telephone order) charge, you can use the Virtual Terminal:

1. Go to our payment gateway website, `https://account.authorize.net`
2. Log in with the appropriate username and password posted in the boxoffice.
3. Click the "Tools" button near the top of the screen. This will take you to the Virtual Terminal transaction screen.
4. Fill in the fields:
    - Required: customer name, billing address (including country "USA"), card number & expiration, V-code.

- You *do not* need to fill in Shipping Address.
- Optionally, you can put a comment in the "Description" field (e.g. "Gift certificate, 2 adult tix").

5. Click *Submit transaction* to put the charge through.

6.5 Common Customer Questions

Here are some answers to questions that commonly come up.

If in doubt, or if the customer is not mollified, there is usually a Board member in the theater before most performances. If there is no Board member present, pass the complaint on to one of the Board members when you can, get the customer's contact information, and assure them we will get back to them. They also have the option of calling the theater's number and dialing extension number 4. That is the "escalate to the Board" unpublished extension for customer griping.

6.5.1 How much are tickets? Is there a student discount? A senior citizen discount?

General admission is $20 adults, $17 seniors (62 and over). For certain performances, we offer a limited number of Student Super Discount tickets at just $5 each. When those tickets are unavailable, the normal student price is $17. Students are up to age 21 (college undergraduates) and will be asked to show a valid student ID at the door.

6.5.2 Is there a group discount?

Yes, if it's a group of 10 or more. Have them call the theater and leave a message, or email reservations@altarena.org, to learn about buying blocks.

6.5.3 Can my group sit together?

If you specifically do a block purchase (see above), we will hold seats together for your block. Otherwise, we are general seating on a first-come first-served basis and *we cannot guarantee you will be able to sit together*. Note that we allow our Subscribers to be seated before any non-Subscribers are seated. Your best bet is to arrive early; doors open one hour before curtain and seating begins 30 minutes before curtain.

6.5.4 Are your shows family-friendly? Are they lighthearted or serious?

(Updated March 15, 2007)

For our 2007 season, the guidelines are:

- Virginia Woolf is rated PG-13 for adult situations. It is a dramatic play and includes conflict. It is considered an American masterpiece and the movie version of it won five Oscars.
- The Last Five Years is suitable for preteens and older. There is some mild language but the situations are rated PG. It has a blend of happy moments and sad moments, just like real relationships.
- Oh My Godmother is rated PG for some slightly risqué humor. It is an upbeat show with a happy ending.
- Urinetown is rated PG to G. It is an upbeat, fast-moving show with a lot of humor and satire, some of which may not make sense to children under 12 or so.
- Morning's At Seven is rated G and is a gentle comedy with a happy ending.

Unless otherwise noted on our Web site, all *Spotlight Series* concert events are family-friendly, designed to appeal to general audiences, and appropriate for children ages 9 and up. Events specifically suitable for even younger children will be marked as such.

6.5.5 I want to pay by check. You used to allow this.

Checks are accepted in person at the Box Office only. For advance reservations, politely tell them they must either *mail* their check to us with a reservation request (and it may take a week or more for us to get it, since we get a lot of mail), or come to the Box Office in person 1 hour before showtime. *We cannot hold advance reservations that will be paid by check at a later time.* (We did previously allow this in special cases but it was very rare.)

6.5.6 I paid for tickets but I want to change the date

Season Subscribers may change the date for free for any show included in their subscription. As a courtesy we ask that they do this 24 hours prior to show time.

However, for *paid* tickets and nonsubscribers, **NOTE:** It's OK for Season Subscribers to change their reservations. The AudienceFirst documentation covers that. This section refers to someone who has *paid* for tickets and wants to change.

Politely inform them that ticket sales are final. (The BPT ticket sales process makes this clear.)

Suggestion 1: If they want to donate their unused tickets to the theater, we would be happy to give them an IRS letter so they can claim a tax deduction.

Suggestion 2: They can give their tickets to a friend.

We don't have the personnel to try to resell tickets for them.

6.5.7 I want a refund

We can't do chargebacks or refunds. Sales are final.

If they're requesting a refund because they had a bad experience at the theater or otherwise feel ripped off (as opposed to because they changed their minds about wanting to go to the show), refer them to extension 4 and we will help them.

6.6 Phone/Voicemail System Operations

RingCentral has fairly good online help, including online training videos, user guides, and more. Just click the *Get Help* button at the top right of any RingCentral screen after logging in.

6.6.1 Retrieving Voicemail

1. Go to RingCentral at http://www.ringcentral.com/extensions
2. Login with phone number 5107649718, extension 2, passcode 1234. You should reach a screen with a list of recent incoming calls.
3. To play a message, click the Play icon to its left. You can replay a message as many times as you want.
4. To delete a message or mark it as Read (which preserves it as a Saved Message), check the box next to that message and click Delete or Mark As Read, as appropriate.
5. Note that some messages are marked with the Caller ID of the caller, if available; this is helpful if the message is garbled.

Note: It is also possible to retrieve messages by phone, but any phone time spent doing this is billed to us (per minute) by Ring Central. Retrieving messages online is free.

6.6.2 Changing Answering Rules

The answering rules determine how incoming calls are handled based on the day, time, and (optionally) where the call is coming from. Call handling options can include forwarding to another phone number; ringing multiple phone numbers at once (in case you don't know where the answering party will be); or going straight to voicemail. (If a call is forwarded and there is still no answer, it will also go to voicemail.)

This section covers the basics of changing the answering rules; see RingCentral's online help for more complicated scenarios.

Login as above to extension 2. Near right side of screen under "Quick Links", click *Answering Rules*. The rules in the blue section of the screen are the ones you want to look at.

Each rule has a "When" part, which says when that rule should be triggered, and a "what to do" part. Clicking on the "When" part lets you change the criteria of when this rule applies. You basically specify a range of hours on each weekday. (The rule called "Business Hours" cannot be deleted or renamed, but it can be changed.)

The "what to do" part has several options you can set for each rule:

- FindMe will cause the call to be forwarded to one or more additional phone numbers. If FindMe is active, clicking on the phone number will take you to a screen where you can set up the FindMe criteria. In particular, look at section 2 of that screen, "Forward My Calls." You can list several phone numbers for forwarding, and specify whether they should be tried one at a time or all at the same time. (The second option is for when you don't know whether the answering party will be at home or on their cell phone, e.g.) If the call cannot be forwarded, it will go to voicemail.
- If FindMe is shown as "Not Configured" for a particular rule, it means call forwarding is not done for that rule.
- Take Messages Only will go straight to voicemail without forwarding the calls to anyone. (The voicemail will be left at this extension.) *Voicemail Greeting* specifies what greeting the caller will hear before leaving a message.

6.7 Listing Tickets on Gold Star Events

We usually offer a few tickets for 1/2 price on GoldStarEvents.com to reach new audiences (GoldStar's emails reach over 30,000 people). Our usual policy is approximately:

- At least 10 tickets for opening night (more if sales slow)
- At least 10 for first matinee
- **NO** discount tickets for Actors Benefit (first Saturday)
- About 6 tickets each for subsequent shows

These numbers can be adjusted if sales are particularly strong (or weak) through our main channels. The numbers can be adjusted after the listing is sent to Gold Star, as long as we honor any tickets already sold.

There are two parts to listing GoldStar tickets for a show. First, you must ask GoldStar to list the tickets for us. Second, you must tell the AudienceFirst system to expect some GoldStar tickets. Once these two steps are done, the will-call list sent from GoldStar will be automatically received by AudienceFirst and integrated into our box office listing. If on the day of the show you have customers claiming to have purchased through GoldStar but who aren't on the will-call list, see section 6.3.1 for how to manually verify the GoldStar will-call list (in case there were problems receiving it into AudienceFirst).

NOTE: Before you can submit a GoldStar listing, we must have a page on our website (www.altarena.org) that describes the show. You will need the URL (Web address) of this page to complete this process.

6.7.1 Listing Tickets With GoldStar

1. Login to GoldStar as a supplier: `http://www.goldstarevents.com/supplier`.
2. Click Submit Listing.
3. Verify the contact information:

Company/Org:	Altarena Playhouse
Your Name:	Box Office manager's name
Email:	goldstar@altarena.org (use for all correspondence
Phone:	(510) 523 1553
Event Title:	Name of show
Venue:	Altarena Playhouse

4. Dates and Times: enter a verbal description of the dates and times for which we want to offer discount tickets. Usually we do this for the run of the show.
5. Offers: fill in only the first line of this table. For Seating, enter General Admission. For Quantity, enter 6. For Full Price, enter the individual ticket walk-up price for the show; for Goldstar Price, enter a number that is exactly half of the walk-up price. (We do not distinguish senior/student discount on Goldstar.)
6. Event Web Page link: Enter the URL of the Altarena website page that decribes this show.
7. In the Notes box at the bottom, be sure to mention the following:
   - NO discount tickets for first Saturday show (Actors Benefit)
   - Please provide additional tickets (10 or 20, as determined by Box Office Manager, Artistic Director, etc.) for opening night and first Sunday matinee

6.7.2 Entering GoldStar Allowance in AudienceFirst

TO BE WRITTEN

6.8 Email Aliases (you@altarena.org)

An email alias allows email to (someone)@altarena.org to forward to the correct individual's personal email account. Our organizational policy is that there are two kinds of forwards:

- Individual staff members should have a forward that looks like *firstname.lastname@altarena.org*, for example, *armando.fox@altarena.org*.

- Positions/functions should have a forward that reflects the position or function, for example, *auditions@altarena.org.*

To add, change or delete an email alias:

1. Login to our ISP administrative console at `http://www.altarena.org/admin` with the username and password supplied by the Webmaster. (This is deliberately different from the login info for the Altarena website's Internal section.)

2. In the left column, click on Email Aliases.You'll see a list of existing aliases.

3. To delete an existing alias, click its Delete box; to change who it forwards to, edit the email address in the right-hand column (to allow a single alias to forward to multiple individuals, enter all email addresses separated by spaces); or to add a new alias, fill in the new information. *Don't forget to click Save Changes button at the bottom of the page when done.*

4. When done, click Logout button in left column.

6.9 Marketing Collateral

When creating graphics for a production, we typically need the following:

- Postcard front—4 × 6 inches, hi-res (300 DPI or better), PDF, color (CMYK process). Must include the following:
  - Altarena logo in upper left or top center. Logos can be found in the file `logos.zip` in the AltarenaMarketing group.
  - Run dates of the show (opening night to closing night)
  - Writer(s), director(s) and, if appropriate, music director(s)
- 11 × 17 color poster. Must carry all the same elements as the postcard front, *plus*:
  - "Presented by Special Arrangement with Music Theatre International" (or whichever licensing agency is used), in small type, bottom center
  - Altarena Playhouse, 1409 High St., Alameda, `www.altarena.org`, 510–523–1553
- 72dpi Web graphic, approx. 300 pixels wide. This should be just a show graphic without the production info, which will appear as text on the website. This graphic is also used in the promo email.