Audience1st Customer Management System

A1 Patron Systems, Inc.

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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. *AudienceFirst* 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 *AudienceFirst* 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 *AudienceFirst* '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.

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[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 *AudienceFirst* '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 1.3 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 Gold-Star 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!

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[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.

AudienceFirst 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 *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 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