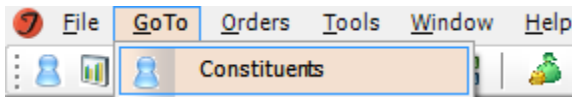


Printing From Tessitura

- *Tessitura Production Database Version 11.0.4.3203*

- Always search using the “Constituent Search” screen (**not** within Order Entry Screen) which can be accessed by:



or from the Bookmark Bar

Const ID	Last/Group Name	First Name	Street Address	Postal Code	City	Locale
1944862	Mr. Richard B. Worley	Richard	Att JoAnn Gadzicki	19428	West Conshohocken	PA

Double-click the desired Subscriber to load their Constituent Screen

Go to **Orders** Tab

Highlight (single click) the Rollover Order (FY16: i.e., **16POFRI**)

- Click the **Subscription Summary** Button (bottom left) to open Subscription Summary Window

Pkg Code	Section	Row	Seat
16PPSUN	Box	75	1
16PPSUN	Box	75	2

Subscription Price	
Subscription Price:	\$339.00
Suggested Contribution:	\$0.00
Suggested Addtl Contribution:	\$0.00
Total:	\$339.00

Payment to Date	
Total Received:	\$0.00
Ticket Price:	\$339.00
Suggested Contr/Excess Paid:	\$0.00
Subscription Balance Due:	\$339.00

Notices

Last Renewal Notice: 2/25/2015
Last Confirmation Notice:

Choose correct **Season** PP16 Philly Pops

Choose **Renewal Notice** option

The current date will auto generate, so click

OK

- The Renewal Form will generate for printing

File GoTo Reports Tools Window Help

Save
ReLogin
Printer Setup...
Print...
Print Screen
Close
Exit

Early Bird Deadline: Feb 09, 2014

Order # 11870773

Renew Online at
www.philorch.org/renew
Renew by phone 215.893.1955
Renew by fax 215.893.1833

230 South Broad Street,
Suite 800
Philadelphia, PA 19102

**SUBSCRIPTION RENEWAL
2014-2015**

Choose correct Printer and Settings (source and size) for corresponding to the company for which you are renewing the subscription.

A list of these can be found in the “Renewals/Subscriptions” section of Athena

Print

Printer

Name: \\poafs01\TP_HP_4350DTNS Properties

Paper source: Tray 3

Paper size: Legal

Status: Idle

Type: Ne04

Where: Ne04

Comment:

☐ Print to file

Print pages

☒ All ☐ Even ☐ Odd

☐ Current Page

☐ Pages:

Enter page numbers and/or page ranges separated by commas. For example, 1,3,5-12

Quality/Duplex

Quality: Default

Duplex: Simplex

Copies

Number of copies: 1

☒ Collate

Orientation

☒ Portrait ☐ Landscape

OK Close

- Retrieve the Renewal Form from the printer and complete it using the “Subscriptions Form Script” document

Printing From the H Drive

This season we will be utilizing a different process for printing forms for BWY. Instead of printing directly from Tessitura there are PDF files located on the H Drive.

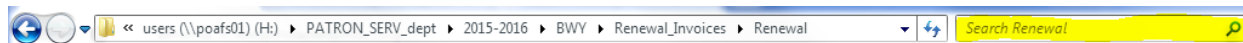
The files are located at H:\PATRON_SERV_dept\2015-2016\BWY\Renewal Invoices.

There are 2 files:

Lapsed Pick
Renewal

When speaking with a patron with a subscription please follow these steps:

1. Pull up their account information in Tessitura and confirm all information.
2. Place the patron on hold and search their account number in one of the above folders (either lapsed pick or renewal, paying attention if they had a subscription last year or not. Renewal would be for those that subscribed last year, lapsed pick did not).
 - a. Enter the patron ID # in the search function



- b. Make sure you pay attention to the ID number on the form that comes up – smaller account numbers will be found within larger numbers, i.e. #1234 could populate the form for ID #123456. If this happens select the next option in the search box.
 - c. When printing make sure you select the following print option



Each file has two pages, one front, one back. The printer will pre-printed backs to print to.

Choose the Lexmark MS610 printer, Tray 1, letter US Mail In-Take

- Separate by Client
- Proceed to Copy Room and open Mail using MartinYale 6200

Removing US Mail from Envelope

- *Carefully remove ALL contents*
- *Keep Envelopes in US Mail Bin for 2 Business Days*
- If subscription request is not on an official Subscription Form

Print Subscription Form from Tessitura
Staple to subscription request

- Check Payments:

Write Date Received and Check Number in the boxes provided on Subscription Form
Write Patron's Order Number, Patron ID on Check

Stamp back of Check with correct Client Stamp

POA = POA Stamp

PBA = PBA Stamp

SPK = SPK Stamp

BWY = TP Stamp

POPS = TP Stamp

KEY = TP Stamp

- Credit Card Payments

Write Date Received in the box provided on Subscription Form

Sorting Subscription Forms

- Within Client, sort by the following:

STRAIGHT Subscriptions (see below for Checking Subscription Forms)

No change to Package

STRAIGHT SPEC REQ Subscriptions (see below for Checking Subscription Forms)

No change to Package with Special Request (Exchanges, ADA Requests, etc.)

CHANGE Subscriptions (see below for Checking Subscription Forms)

Changing Package

Changing Seat (number, row, or zone)

Adding Seat

Dropping Seat

Adding a Subscription

Dropping Subscription

CREATE-YOUR-OWN/PICK Subscriptions

Place Subscription Forms directly into the Subscription Sorting Bins (for correct Client)
on the wall for LPSRs to process

PAYMENT PLAN Subscriptions

Place Subscription Forms directly into the Subscription Sorting Bins (for correct Client)
on the wall for LPSRs to process

CASH Subscriptions

Give IMMEDIATELY to LPSR

PROBLEM FORMS

Missing Information (Credit Card number, expiration date, nothing on the form is filled out, etc.)

Set aside and research at a later time (same day if possible) or follow up with a LPSR or PSR to see if it something they can take care of

Place in the Problem Bin

PRIORITY

Place in Priority Patrons Bin for Priority Service Representative to pick up

Maestro Circle Donors (\$2500+)

Volunteers

Staff

Subscription forms with Matching Gift form attached

Checking Subscription Forms

- *It is easier to start with the Straight Subscriptions*

- STRAIGHT Subscriptions and STRAIGHT SPEC REQ Subscriptions

Using the Client Price Sheet

Check Cost of Package, AddOns, Parking, and if any Contributions are listed

- Calculate patron's subscription form and compare what they have totaled
 - If all is correct, begin highlighting
 - Order Number
 - Each box that contains a total
 - Grand total
 - Payment method
 - Special Instructions if applicable
 - For Subscriptions with Checks
 - Make sure Check is secured to Subscription Form via paper clip
 - Place Subscription Forms in Subscription Sorting Bins (for correct Client)
 - If any is incorrect
 - Correct the Total/Pricing
 - Depending on the how much the total is off depends on whether the patron is contacted
 - \$50 and more the patron is contacted
 - \$49 and less the subscription is processed without calling the patron
 - If patron needs to be contacted place the form aside along with other problem forms that need follow up
- CHANGE Subscriptions
 - Using the Client Price Sheet
 - Compare current package with newly requested package
 - Check Cost of Package, AddOns, Parking, and if any Contributions are listed
 - If Cost is the same, begin highlighting
 - Order Number
 - Each box that contains a total
 - Grand total
 - Payment method
 - Special Instructions if applicable
 - For Subscriptions with Checks
 - Make sure Check is secured to Subscription Form via paper clip
 - Place Subscription Forms in Subscription Sorting Bins (for correct Client)
 - If Cost is different
 - Calculate the LOWER Cost of the two Packages and begin highlighting
 - Order Number
 - Each box that contains a total
 - Grand total
 - Payment method
 - Special Instructions if applicable
 - For Subscriptions with Checks
 - Make sure Check is secured to Subscription Form via paper clip
 - Place Subscription Forms in Subscription Sorting Bins (for correct Client)

Batching Subscription Forms

- *After all sorting, checking and highlighting is completed*
 - Pull Subscription Forms from one Subscription Sorting Bin at a time
 - Sort by Credit Card (AMEX, VISA, M/C, DISC), Check, Gift Certificate, Cash
 - Count out a minimum of 15 and a maximum of 25 Forms

As subscription season declines and there are not as many forms to process the minimum changes to 10 and the maximum remains 25

- Create the Subscription Control Batch Cover Sheet and Spread Sheet:

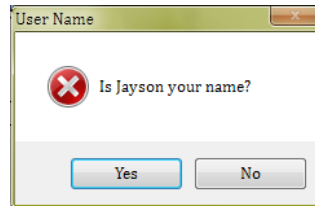
H:\PATRON_SERV_dept\Leading A Shift\Batch Formatter v3 3win7

Select “Add-Ins” Menu

Batch Reports

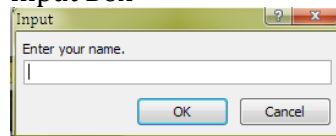
New Batch

User Name Box



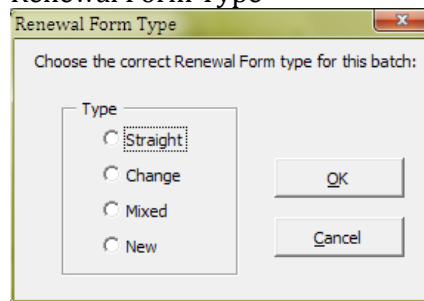
Select “No” if your name is not displayed

Input Box



Type your first name and select “Ok”

Renewal Form Type



Select the type of batch you are creating

For CYO select “Mixed” and change “Type of Renewal” on the Cover Sheet to CYO/[Client]

For all batches please indicate the resident company after the type of batch being created on the Cover Sheet, i.e. Straight/POA, Straight/PBA, etc.

Select the “Batch” Worksheet

Enter the Grand Total for each subscription by Payment Method

If this is a batch of 25 the Batch Formatter will generate a pop-up box to let you know you have 25 entries; stop at this point even if you have more forms to input from that particular batch and place extra subscriptions form(s) with another pile waiting to be batched.

- Printing

*This only needs to be set up once at the start of your batching, afterwards start at ***“Add-Ins” Menu***

File → Print

Printer: TP LaserJet 3015n

Settings: Print Entire Workbook

Change “Letter” to “Legal”

***“Add-Ins” Menu**

Batch Report

Print Batches

Order of Print Outs

Subscription Control Batch Cover Sheet

Batch Excel

Subscription Forms

Secure with binder clip

Place in the Data Entry Bin