

## 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*

- 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*

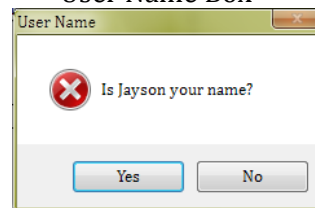
- STRAIGHT Subscriptions and STRAIGHT SPEC REQ Subscriptions
  - Using the Client's FY15 Price Sheet
    - Check Cost of Package, AddOns, Parking, and if any Contributions are listed
      - Calculate patron's subscription form and compare what they have totaled
    - If all is correct, begin highlighting
      - 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's FY15 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)

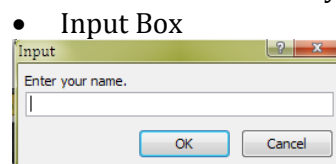
## Batching Subscription Forms

*After all sorting, checking and highlighting is completed*

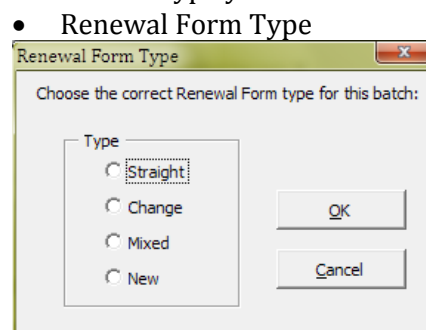
- Pull Subscription Forms from one Subscription Sorting Bin at a time
- Sort by Credit Card (VISA, M/C, AMEX, and DISC)
- Count out a minimum of 15 and a maximum of 25 Forms
  - As subscription season declines and there are not as many forms to process the minimum changes to 10 and the maximum remains 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



- Type your first name and select “Ok”



- 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