Tickets Guide
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From Tickets, you configure locations, prices, resources, sales methods and delivery methods, as well as fees, and taxes. You also add, manage, and schedule programs and program events. Many of the configuration tasks you access from Tickets must be completed before you can build programs and sell tickets.

To help guide you through the initial configuration process, we provide a configuration checklist. Because some configuration tasks build on others, we recommend that you refer to the checklist as it provides a suggested workflow.

**Ticket Sales Setup**

To help you accurately configure the system to sell items such as tickets and memberships, use the Ticket Sales Setup page to guide you through the necessary steps. The Ticket Sales Setup page provides an interactive list of the tasks necessary to successfully complete the initial configuration. To access the Tickets Setup page, from Tickets, click Tickets sales setup.

The tasks on the Ticket Sales Setup page are presented in a specific order because some build on others. Each task is linked to the corresponding area of the program where you complete the selected task. For example, when you select Discounts from the Tickets Sales Setup page, you are sent to the Discounts page so you can add and manage the discounts your organization will use.

Next to each task on the Ticket Sales Setup page a red "X" appears to indicate that configuration is incomplete. After each task is fully complete, a green checkmark appears. When you first access the Tickets Setup, some tasks will already have a green checkmark due to default data already provided in the system. You should review all default data to determine how it should be edited or what needs to be added.

If a task has a dependency upon the completion of another task, it will be inactive until all other tasks on which it depends are complete. For example, Events will be inactive until you have configured at least one program and assigned prices in Programs. Provided under each task is a brief description, as well as a count of how many active individual records have been configured in each feature area. For example, if you have configured five active discounts, “5 discounts available” appears under Discounts on the Ticket Sales Setup page.

*Note:* While some tasks, like add locations and configure prices, must be configured by all organizations, a number of configuration tasks are optional. For example, not all organizations will charge fees or taxes. The tasks your organization will complete is directly related to your business processes.
After you complete a task, you can navigate back to the Ticket Sales Setup page by clicking the direct link provided in each feature area. This allows you to easily continue to the next task. To return to Ticket Sales Setup from a feature area, under Setup on the explorer bar, click Tickets sales setup.
For more information about each item on the Tickets Setup page, see Tickets Setup Checklist on page 13.

Tickets Setup Checklist

The following checklist is a suggested workflow for initial configuration. The tasks are presented in a specific order because some tasks build on others. While some tasks, like add locations and configure prices, must be configured by all organizations, a number of configuration tasks are optional. For example, not all organizations will charge fees or taxes. The tasks your organization will complete is directly related to your business processes.

Note: Although many of the configuration tasks you access from Tickets may only need to be completed once, there are other tasks you may configure initially but return to on a regular basis to adjust as needed. For example, you may adjust the discounts you offer on a seasonal basis or add new price lists throughout the year.

- Enter organization information. This includes your organization name, address, phone number, and website. The information you enter will be displayed in reports and sales documents generated by the system. For example, when a receipt prints after a ticket sale, the organization information you enter is displayed on the receipt. For more information, see Organization Information on page 15.

- Add tax entities. At least one tax entity is required per tax. For example, if you collect state sales tax, you must add a tax entity for that state. You can also use multiple tax entities to group similar taxes together. For example, if your organization collects sales tax, you may need to collect different sales taxes for state, city, and county governments. With tax entities, you can create an entity for each state, city, and county sales tax you collect. You can then add a single sales tax to the system and assign all these entities to it. From Administration, you add the necessary tax entities so they can be used when you configure the taxes your organization charges. For more information, see Configure Tax Entities on page 16.

- Add taxes. If your organization charges tax, you must add each required tax to the system and configure the rate. For more information, see Taxes on page 16.

- Add fees. Fees are additional charges that can be applied automatically at the point of sale on a per item or per order basis. You can charge a flat amount or configure the fee to be a percentage. The fees you charge depend entirely on your business processes. For example, if you offer delivery through standard or overnight mail, you should define fees for each and add them to the appropriate delivery methods. Your organization may also configure fees that are assigned to specific sales methods. For example, you may charge a fee for advance sales but not daily sales. For more information, see Fees on page 19.

- Add delivery methods. Delivery methods determine how customers receive the tickets they purchase. Common delivery methods include will call, standard mail, and overnight mail. Delivery methods are typically defined during initial setup by the programming coordinator but new methods can be added at any time. For more information, see Delivery Methods on page 23.
Add price types. Price types are the different rates that apply to patrons when they purchase tickets, such as Adult and Child. From Administration, you add price types your organization uses so they may be easily selected for use when you create price lists. For more information, see Configure Price Types on page 28.

Configure sales methods. The way a customer purchases a ticket is called a sales method. By default, the system includes every sales method your organization needs. The included sales methods are Daily Sales, Advance Sales, Group Sales, and Online Sales. During initial setup and as needed, you configure the sales methods to meet the specific needs of your organization. For example, you determine the delivery methods that are valid for each method, as well as specify the valid forms of payment. For more information, see Sales Methods on page 31.

Configure point of sale donations. When you configure point of sale donations, you determine if donations should be prohibited for specific sales methods. For example, you can prohibit donations when processing daily sales but allow them for advance sales. By default, you can accept donations through all sales methods. During the configuration process you can also enter a default donation amount and designation. For more information, see Point of Sale Donations on page 37.

Configure memberships. If your organization offers memberships, you can create different membership programs for which patrons can join. If your organization does not offer multiple membership programs, edit the default program provided to suit your needs. Membership programs have different levels, and usually have a fee, such as monthly or annual dues. When patrons are members they are eligible for different benefits, such as special discounts or reduced rates. For more information, see the Memberships Guide.

Configure memberships. If your organization offers memberships, you can create different membership programs for which patrons can join. If your organization does not offer multiple membership programs, edit the default program provided to suit your needs. Membership programs have different levels, and usually have a fee, such as monthly or annual dues. When patrons are members they are eligible for different benefits, such as special discounts or reduced rates. For more information, see the Memberships and Program Levels section of the help file.

Add counties. From Administration, you can define the counties in which your patrons live. The counties in which your patrons live can determine certain requirements such as eligibility for discounts. For more information, see Configure Counties on page 99.

Add ticket discounts. Ticket discounts are price reductions applied to tickets or items purchased. You can configure discounts to be applied automatically, manually, or with the entry of a promotion code. For more information, see Ticket and Merchandise Discounts on page 63.

Add locations. Each location you add has address information, contact information, and location capacity. After a location is added it is available for all event types. For more information, see Locations on page 38.

Add locations. Each location you add has address information, contact information, and location capacity. After a location is added it is available for all event types. For more information, see the Event Setup section of the help file.

Configure price lists. To make the process of assigning prices more efficient, we recommend that you configure price lists. Price lists are intended to provide a starting point for when you configure ticket prices on programs and program events. When you add a price list you select price types to include in the list. If a price type you need does not exist, you can add one. For more information, see Price Lists on page 27.
Organization Information

One of the initial system configuration tasks you must complete is to enter your organization name and contact information, which includes your address, phone number, and website. After this information is entered, it is displayed in reports and sales documents generated by the system. For example, when a receipt prints after a ticket sale, the organization information you enter is displayed on the receipt. To complete this task, you edit the generic organization information provided with the system.

**Warning:** If you do not enter the specific name and contact information for your organization, the generic information that is provided with the system will be used in reports and sales documents.

### Edit organization information

1. From Tickets, under **Configuration**, click **Organization information**. The Manage Organization Information page appears.

2. Click **Edit**. The Edit organization information screen appears.

3. Enter your organization name as it should appear on reports and sales documents. Also enter your organization's address, phone number, and website.
4. Click **Save**. You return to the Manage Organization Information page and the updated information is displayed in the grid. If your organization name or contact information should change, you must edit this information as needed.

**Taxes**

To charge taxes during a sales process, you must add each required tax to the system and configure the rate. You can also make one tax the default applied to taxable merchandise. When you configure a tax, you can assign both daily admission programs and scheduled programs to the tax. This is an efficient way to add taxes to multiple programs, rather than to access each individual program record.

*Note:* If your organization charges tax, you must add debit and credit account or account code mappings that are used when you generate GL distributions for tax revenue. For more information, see the "Manage GL Account Setup" section of the **Administration Guide**.

After a tax is added to the system, it is active immediately and you can assign it to programs and any other items or services you sell. When an order is processed that involves an item configured with a tax, the appropriate tax is automatically charged. Each tax charged is clearly displayed during the order process.

*Warning:* When a rate changes for an existing tax, you should edit the appropriate tax and enter the new rate the night before the new rate takes effect. For more information about how to change a tax rate, see [Edit Taxes on page 1](#).

**Configure Tax Entities**

At least one tax entity is required per tax. For example, if you collect state sales tax, you must add a tax entity for that state. When you add the actual tax to the system, you select the state tax entity and assign it a tax rate percentage.

You can also use multiple tax entities to group similar taxes together. For example, if your organization collect sales tax, you may need to collect different sales taxes for state, city, and county governments. With tax entities, you can create an entity for each state, city, and county sales tax you collect. You can then add a single sales tax to the system and assign all three entities to it. In this scenario, when a patron makes a purchase, they will see a single “Sales tax” line item on their receipt and the tax they pay is a combined percentage that totals all three entities.

Optionally, you can choose not to use multiple entities for a single tax and instead add three separate sales taxes to the system. In this scenario, when a patron makes a purchase, they will see a line item for each sales tax on their receipt instead of a single combined sales tax item.

*Tip:* You can pre-define tax entities in **Administration** or add them as you go when you add each tax to the system.

After you add a tax entity, you can edit or remove it as necessary. If a tax entity is no longer in use, but you do not want to delete it, you can make it inactive. Inactive tax entities cannot be used when you configure taxes.
Add a tax entity

1. From Administration, under Data, click Code tables. The Code Tables page appears.
2. Under Financial, click the Tax Entity code table name. The Tax Entity Table Entries page appears.
3. On the action bar, click Add. The New table entry screen appears.
4. Enter a name for the tax entity.
5. Click Save. You return to the Tax Entity Table Entries page. Repeat this process to add each tax entity your organization needs.

Add Taxes

To charge taxes during a sales process, you must add each required tax to the system and configure the rate. You can add a simple tax that includes a single rate or you can add a tax with multiple entities, each with its own tax rate. Additionally, you also determine whether the tax should be the default applied to taxable merchandise.

After you add a tax, it is active in the system and can be assigned to individual programs, events, and any other items or services you sell. When an order is processed that involves an item configured with a tax, the appropriate tax is charged.

Tip: To save time, you can assign daily admission programs and scheduled programs to a tax. This is an efficient way to assign taxes to multiple programs, rather than to access each individual program record. For more information, see Add Programs to Taxes on page 18.

Warning: When a rate changes for an existing tax, you should edit the appropriate tax and enter the new rate the night before the new rate takes effect. For more information about how to change a tax rate, see Edit Taxes on page 1.

Add a tax

1. From Tickets, under Pricing, click Taxes. The Taxes page appears.
2. On the action bar, click Add. The Add a tax screen appears.
3. Enter a name and description for the tax.
4. To make this tax the default added to new merchandise items, select Set as default for merchandise. For example, if you have a local sales tax requirement, you can it as the default.

Note: You can make only one tax the default. A default merchandise tax is not required.
5. In the Items grid, select a tax entity. If the tax entity you need does not appear in the list, you must configure it in Administration. For more information, see Configure Tax Entities on page 16.

Note: To create a tax with multiple tax entities, select the tax entities in the blank fields that appear and enter a tax rate for each. For example, you may have a tax that includes state, county, and city taxes. The tax total is calculated and displayed.
6. In the **Percent** field, enter a tax rate.

7. Click **Save**. You return to the Taxes page and the tax immediately becomes active. You can now assign programs to the tax. For more information, see [Add Programs to Taxes on page 18](#).

### Add a Tax Screen

The table below explains the items on the Add a tax screen. For information about how to access this screen, see [Add Taxes on page 17](#).

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Field Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Enter the name of the tax.</td>
</tr>
<tr>
<td>Description</td>
<td>Enter a description associated with the tax.</td>
</tr>
</tbody>
</table>
| Set as default for merchandise | To make this tax the default added to new merchandise items, select **Set as default for merchandise**. For example, if you have a local sales tax requirement, you can it as the default.  
**Note:** You can make only one tax the default. A default merchandise tax is not required. |
| Tax Entity                  | Select a tax entity or add a new one if the tax entity you need does not appear in the list. You can select multiple tax entities for each tax record.  
For example, you may have a tax that includes state, county, and city taxes. |
| Percent                     | Enter a tax rate to determine how the tax is calculated.                           |
| Total tax                   | Displays the total value of the tax.                                              |

### Add Programs to Taxes

When you configure a tax, you can assign both daily admission programs and scheduled programs to the tax. This is an efficient way to add taxes to multiple programs instead of accessing each individual program record and assigning a tax to each.

**Note:** After you add a scheduled program to a tax, each subsequent event you schedule for that program will have the tax assigned by default.

#### Add a program to a tax

2. Click the tax. The tax record appears.
3. Select the Programs tab and click **Add**. The Add a program screen appears.
4. Enter the program name or click the magnifying glass to search for a program. The Program Search screen appears.

5. On this screen, enter criteria to help locate the program. You can search by name and location. In the results grid, select the program to assign to the tax and click Select. You return to the Add a program screen and the program is displayed.

6. Click Save. To assign additional programs to this tax, repeat this process.

Add Merchandise Items to Taxes

On the Merchandise tab of a tax record, you can specify which merchandise items the tax applies to. For example, if you have a local junk food tax, you can add the food items are subject to this tax, such as sodas or candy.

Add a merchandise item to a tax

1. From Tickets, under Pricing, click Taxes. The Taxes page appears.
2. Click the name of the tax. The tax record appears.
3. Select the Merchandise tab and click Add. The Add merchandise screen appears.
4. Select the merchandise item the tax applies to.
5. Click Save. To assign additional merchandise items to this tax, repeat this process.

Note: You can apply only one tax to a merchandise item at a time. If you add an item to the Merchandise tab that was already assigned to another tax, the new tax applies to the item. You do not receive a warning.

Remove Programs From Taxes

If a tax should no longer be applied to a program, you can access the tax record and remove the program. After a program is removed from the tax record, future orders that involve the program will not be charged the tax.

Remove a program from a tax

1. From Tickets, under Pricing, click Taxes. The Taxes page appears.
2. Under Programs, in the grid, select the program to no longer associate with this tax.
3. On the action bar, click Remove. A confirmation message appears.
4. Click Yes. You return to the tax record.

Fees

Fees are additional charges that can be applied automatically at the point of sale on a per item or per order basis. You can charge a flat amount or configure the fee to be a percentage. The fees you charge
depend entirely on your business processes. For example, if you offer delivery through standard or overnight mail, you should define fees for each and add them to the appropriate delivery methods. Your organization may also configure fees that are assigned to specific sales methods. For example, you may charge a fee for advance sales but not daily sales.

Additionally, you may need to set up per item fees for programs. For example, you may offer an art workshop that requires a materials fee. When you configure the materials fee, you then add the appropriate program to the fee. When an order is processed that involves a program with a fee, the appropriate fee is automatically charged for each ticket purchased. You cannot add per order fees to programs.

Note: If your organization charges fees, you must add debit and credit account code mappings that are used when generating GL distributions for fee revenue. For more information, see the “Map Account Codes for Ticketing Office” section of the Administration Guide.

Add Fees

When you add a fee to your database, you enter a name and description. You also determine whether the fee applies to a specific item or an entire order. Additionally, you determine whether the fee is an amount or percentage and set a value for the fee.

After you add a fee, you access the fee record to define additional characteristics. These characteristics include adding specific programs that the fee should be applied to and assigning taxes to the fee. When you create a new fee, it is immediately active in the program.

Note: When you add fees for programs, remember that only per item fees can be assigned to a program. When you add a per item fee to a program, the fee is charged for each ticket purchased. You cannot assign per order fees to programs.

Add a fee

1. From Tickets, under Pricing, click Fees. The Fees page appears.
2. On the action bar, click Add. The Add a fee screen appears.
3. Enter a name and description for the fee. The name and description you enter here will be displayed at the point of sale when processing orders, on receipts and other order documentation, and on reports.

4. In the **Applies to** field, select “Order” or “Item.” This determines whether the fee is charged once per transaction or for each item in a transaction.

   **Note:** When you add fees for programs, remember that only “Item” fees can be assigned to a program. When you add a per item fee to a program, the fee is charged for each ticket purchased. You cannot add “Order” fees to programs.

5. In the **Type** field, select “Amount” or “Percent.” This determines whether the fee is a flat amount or a percentage calculated on the order or item.

6. In the **Value** field, enter the value of the fee. If you selected “Amount” in the **Type** field, enter a dollar amount here. If you selected “Percent,” enter the percentage to charge. For example, to calculate a 5% fee, enter “5.”

7. Click **Save**. You return to the Fees page and the new fee is displayed in the grid. You can now add programs and taxes to the fee. For more information, see Add Programs to Fees on page 21 and Add Taxes to Fees on page 23.

**Add a Fee Screen**

The table below explains the items on the Add a fee screen. For information about how to access this screen, see Add Fees on page 20.

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name and Description</td>
<td>The name and description you enter will be displayed at the point of sale when processing orders, as well as on receipts and other order documentation, and on reports.</td>
</tr>
<tr>
<td>Applies to</td>
<td>Select “Order” or “Item.” This determines whether the fee is charged once per transaction or for each item in a transaction. When configuring fees for programs, remember that only “Item” fees can be assigned to a program. When you add a per item fee to a program, the fee is charged for each ticket purchased. You cannot assign “Order” fees to programs.</td>
</tr>
<tr>
<td>Type</td>
<td>Select “Amount” or “Percent.” This determines whether the fee is a flat amount or a percentage calculated on the order or item.</td>
</tr>
<tr>
<td>Value</td>
<td>Enter the value of the fee. If you selected “Amount” in the <strong>Type</strong> field, enter a dollar amount here. If you selected “Percent,” enter the percentage to charge. For example, to calculate a 5% fee, enter “5.”</td>
</tr>
</tbody>
</table>

**Add Programs to Fees**

Your organization may need to set up fees on a per program basis. For example, you may offer several art workshops that require a materials fee. When you configure the materials fee, you then assign each
program to it. When an order is processed that involves a program with a fee, the appropriate fee is charged for each ticket purchased.

Note: The Programs tab appears only on “Item” fee records. This is because you can only assign programs to “Item” fees. After a program is assigned to per item fee, the fee is charged for each ticket purchased.

You can assign both daily admission programs and scheduled programs to fees. After you assign a scheduled program to a fee, each subsequent event you schedule for that program will have the fee assigned by default.

Note: You add programs to per “Item” fees only. After a program is assigned to per item fee, the fee is charged for each ticket purchased. You cannot assign programs to “Order” fees.

Add a program to a fee

1. From Tickets, under Pricing, click Fees. The Fees page appears.
2. Click the fee. The fee record appears.
3. Select the Programs tab, which is displayed only on “Item” fee records. On the action bar, click Add. The Add a program screen appears.
4. Click the magnifying glass to search for a program. The Program Search screen appears.
5. On this screen, enter criteria to help locate the program. You can search by name and location. In the results grid, select the program to add to the fee and click Select. You return to the Add a program screen and the program is displayed.
6. Click Save. You return to the fee record. To assign additional programs to this fee, repeat this process.

Remove Programs From Fees

If a program should no longer be charged a specific fee, you can access the fee record and remove the program. After a program is removed from the fee record, future orders that involve the program will not be charged the fee.

Remove a program from a fee

1. From Tickets, under Pricing, click Fees. The Fees page appears.
2. Click a fee. The fee record appears.
3. Select the Programs tab, which is displayed only for “Item” fee records.
4. In the grid, select the program to no longer associate with this fee and on the action bar, click Remove. A confirmation screen appears.
5. Click Yes. The program is removed from the fee record.
Add Taxes to Fees

If needed, you can add taxes to the fees your organization charges. When you apply the fee to an item, the item value is increased by the initial fee plus the amount of the tax on the fee. For example, an organization has a $5 service charge that is subject to a 10% tax. A customer purchases a $10 ticket. When the fee is applied, the ticket price increases by $5 plus an additional $.50 which is the tax amount of the original fee. The total value of the ticket is $15.50.

✔ Add a tax to a fee

1. From Tickets, under Pricing, click Fees. The Fees page appears.
2. Click the fee. The fee record appears.
3. Select the Taxes tab, which is displayed only on “Item” fee records.
4. On the action bar, click Add. The Add a tax screen appears.
5. Select a tax to add to this fee. The taxes that appear in the list are predefined. For more information about taxes, see Taxes on page 16.
6. Click Save. You return to the fee record. To assign additional taxes to this fee, repeat this process.

Remove Taxes From Fees

If a tax is no longer applicable for a fee, you can remove it from the fee record.

✔ Remove a tax from a fee

1. From Tickets, under Pricing, click Fees. The Fees page appears.
2. Click the fee for which the tax should be removed. The fee record appears.
3. Select the Taxes tab, which is displayed only on “Item” fee records.
4. Under the Taxes grid, select the tax you want to remove from the fee record and click Remove. A confirmation message appears.
5. Click Yes. The tax is removed from the fee record.

Delivery Methods

Delivery methods determine how customers receive the tickets they purchase and other sales documents. Common delivery methods include “In person,” “Will call,” “Standard mail,” and “Overnight mail.” Delivery methods are typically defined during initial setup by the guest services manager, but you can add methods at any time.

After you add delivery methods, you assign them to sales methods to determine which delivery options are available for each type of sale. For example, if you offer phone sales or other forms of
advance sales, you would make sure that “Standard mail,” “Overnight mail,” and “Will call” are all valid delivery methods for the “Advance Sales” sales method.

You access the Delivery Methods page to add, edit, and delete delivery methods, as well as assign fees to delivery methods and determine when to print sales documents. You can also mark delivery methods as inactive if you no longer use them. To access the Delivery Methods page, go to Tickets and click Delivery methods under Configuration.

Add Delivery Methods

Delivery methods determine how customers receive the tickets they purchase. Common delivery methods “In person,” “Will call,” “Standard mail,” and “Overnight mail.” When you create a delivery method, you name it and select whether to require a customer’s name, address, and email. You also determine whether to block the delivery method if tickets are purchased within a certain proximity to the event’s start date. For example, if a customer purchases tickets the day before an event, mail options are not valid delivery methods because tickets would not arrive in time.

You also select how to handle the printing of sales documents associated with orders that use the delivery method. You can defer printing, print immediately upon completion of the order, or send an email immediately upon completion of the order. For example, you can print sales documents immediately for orders that are delivered overnight in order to prepare them for mailing right away, or you can defer printing for will call orders to print tickets and other sales documents on the day of the program event. The option to send sales documents via email is only available for purchases that are made through web forms.

Note: After you create delivery methods and select how to handle the printing of sales documents, you must configure printing rules for each sales document template that your organization uses. The printing rules determine whether tickets and other sales documents print based on the sales method and delivery methods selected during the sales process. For information, see Configure Printing Rules for Advance, Daily, and Online Sales on page 148.

> Add a delivery method

1. From Tickets, click Delivery methods under Configuration. The Delivery Methods page appears.
2. Click Add. The Add a delivery method screen appears.
3. In the **Name** field, enter a name for the delivery method. Common delivery methods include standard mail, overnight mail, and will call.

4. In the **Tickets** field, select how to handle the printing of sales documents associated with orders that use the delivery method. You can defer printing, print immediately upon completion of the order, or send an email immediately upon completion of the order. You can only send sales documents via email for purchases made through web forms.

   **Note:** After you create delivery methods and select how to handle the printing of sales documents, you must configure printing rules for each sales document template your organization uses. The printing rules determine whether tickets and other sales documents print based on the sales method and delivery methods selected during the sales process. For information, see [Configure Printing Rules for Advance, Daily, and Online Sales on page 148](#).

5. In the **Require** field, select the information to require from patrons for the delivery method.

6. To block the delivery method when there is not enough time before the program event to deliver tickets or other items, select **Block this delivery method** and then enter the number of hours or days before the event to block the delivery method.

7. Click **Save**. After you add a delivery method, you can assign fees to it. For example, you can charge a shipping fee for delivery methods that require shipping. For information, see [Configure Delivery Method Fees on page 26](#).

### Add a Delivery Method Screen

The table below explains the items on the Add a delivery method screen. For information about how to access this screen, see [Add Delivery Methods on page 24](#).

<table>
<thead>
<tr>
<th><strong>Screen Item</strong></th>
<th><strong>Description</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Name</strong></td>
<td>Enter the name for the delivery method. Common delivery methods include standard mail, overnight mail, and will call.</td>
</tr>
</tbody>
</table>
### Configure Delivery Method Fees

When delivery methods incur costs, you can associate fees with them so that when the delivery methods are selected at the point of sale, their corresponding fees are applied to the order. For example, if you offer delivery through standard or overnight mail, you can set up fees for mailing costs and apply them to delivery methods as necessary. For information about how to set up fees, see [Fees on page 19](#).

You can also remove fees from delivery methods if necessary. For example, you may charge a shipping fee and a handling fee for the overnight delivery method, but if you no longer want to charge the handling fee, you can remove it from the overnight delivery method.

#### Add fees to a delivery method

1. From Tickets, click **Delivery methods** under **Configuration**. The Delivery Methods page appears.

2. Click the name of an active delivery method. The delivery method record appears. This page displays summary information about the delivery method.

3. In the **Fees** grid, click **Add**. The Add a fee screen appears.
4. In the **Fee** field, select the fee to apply to the delivery method. For information about how to set up fees, see *Fees on page 19.*

5. Click **Save.** You return to the delivery method record.

> **Remove fees from a delivery method**

1. From *Tickets,* click **Delivery methods** under **Configuration.** The Delivery Methods page appears.

2. Click the name of an active delivery method. The delivery method record appears. This page displays summary information about the delivery method.

3. In the **Fees** grid, select a fee and click **Remove.** A confirmation screen appears.

4. Click **Yes.** You return to the delivery method record.

### Edit Receipt Default

You can change the default itemized receipt printing option for Daily Sales or Advance Sales. From the Sales Methods page, select **Daily Sales** or **Advance Sales** under **Sales methods.** On the Delivery Methods tab, click the down arrows to expand the delivery method, and click **Edit receipt default.** In the **Receipt default** field, choose the default method for providing the receipt.

### Price Lists

Price lists are intended to provide a starting point for configuring ticket prices on programs and program events. When you add a price list you select price types to include in the list. If a price type you need does not exist, you can add one. During the process of adding a price list, you can apply the list to existing programs you select. Additionally, after a price list is added, you can access an individual program record and load the specific price list. For efficiency, you can copy price list to use as the basis for a new price list.

There are multiple ways to define prices for the tickets you sell. You can apply the price lists you create directly to programs or you can load a price list from the program record. After a price list is applied or loaded, you can edit the prices for programs. You can also define individual prices for programs without starting with a list. For more information, see “Configure Program Ticket Prices” on page 14.

Additionally, you can assign custom prices to individual program events. To define custom prices for a program event, you access the program event record. For more information, see “Assign Custom Ticket Prices to Program Events” on page 17.

**Tip:** We recommend that you establish pricing with standard price types and price lists. We do not recommend creating prices types to handle discounts. Instead, you should configure the specific discounts you need, which can then be applied to tickets during the sales process.
Configure Price Types

Price types are the different rates that apply to patrons when they purchase tickets, such as Adult, Senior, and Child. From Administration, you add price types your organization uses so they may be easily selected for use when you create price lists.

After you add a price type, you can edit or remove it as necessary, such as if your organization no longer offers a specific rate. If a price type is no longer in use, but you do not want to delete it, you can make it inactive. Inactive price type cannot be used when you configure price lists.

► Add a price type

1. From Administration, click Code tables under Data. The Code Tables page appears.
2. Under Ticketing, click Price Type code table name. The Price Type Table Entries page appears.
3. On the action bar, click Add. The New table entry screen appears.
4. Enter the name of the price type you would like to add.
5. Click Save. You return to the Price Type Table Entries page.

► Edit a price type

1. From Administration, click Code tables under Data. The Code Tables page appears.
2. Under Ticketing, select the Price Type code table name. The Price Type Table Entries page appears.
3. Select the price type to edit and click Edit on the action bar. The Edit table entry screen appears.
4. Edit the name of the price type as necessary.
5. To make the price type inactive, select the checkbox.
6. Click Save. You return to the Price Type Table Entries page.

**Note:** After you make a price type inactive, when you return to the Price Type Table Entries page, a status of No appears in the Active column of the selected price type. To make a price type active again, select the price type and click Edit on the action bar. Deselect the checkbox and click Save. The price type is now active.

► Remove a price type

If necessary, you can delete a price type. On the Price Type Table Entries page, select the price type to delete. On the action bar, click Delete. A confirmation message appears. Click Yes. You return to the Price Type Table Entries page and the price type no longer appears.
Add Price Lists

When you add a price list, you enter a name, description, and select price types. If a price type you need does not exist, you can add one. You also enter and enter ticket face prices. The face price is the base price of a ticket before any discounts or fees are applied.

During the process of adding a price list, you can apply the list to existing programs. Additionally, after a price list is added, you can access an individual program record and load the specific price list.

**Note:** Typically, price lists are used as templates for loading standard prices when adding programs. You can load a price list on a program to quickly establish standard prices and then adjust specific prices as needed.

**Add a price list**

2. On the action bar, click **Add**. The Add a price list screen appears.

3. Enter a name and description for the price list.
4. In the **Prices** grid, select each price type. For example, common price types include “Adult,” “Child,” and “Senior.” If the price type you need does not appear in the list, you must configure it in **Administration**. For more information, see Configure Price Types on page 28.

**Note:** By default, every price type is available through all sales methods. To disallow a price type from being available through a specific sales method, access the sales method record and edit the Price Types tab.

5. Enter the face price for each price type. The face price is the base price of a ticket before any discounts or fees are applied.
6. In the **Programs** grid, you can select programs to update with this price list. When you update programs with a new price list, all previous pricing is deleted and replaced with the new price
list. However, there is an exception. If you have assigned custom prices to a program event, the pricing on that event will not be changed when a new a price list is applied. In the grid, click the binoculars to access the Program Search screen to locate programs.

7. Click Save. You return to the Price Lists page.

Copy Price Lists

To save time, you can copy a price list that already exists instead of starting with a blank price list. A copied price list retains the price types and prices defined on the list being copied. You can then edit the new price list as needed.

**Copy a price list**

1. From Tickets, under Pricing, click Price lists. The Price Lists page appears.

2. Select the price list to copy and on the action bar, click Copy. The Copy price list screen appears. The name of the price list you are copying is displayed at the top of the screen.

3. Enter a name and description for the new price list.

4. In the Prices grid, you can add or remove price types. For example, common price types include “Adult,” “Child,” and “Senior.” If the price type you need does not appear in the list, you can enter a new one. A confirmation screen appears when you add a new price type. For more information, see Configure Price Types on page 28.

**Note:** By default, every price type is available through all sales methods. To disallow a price type from being available through a specific sales method, access the sales method record and edit the Price Types tab.
5. Enter the face price for each price type. The face price is the base price of a ticket before any discounts or fees are applied.

6. Click Save. You return to the Price Lists page.

Edit Price Lists

You can edit a price list to add or remove price types and to change the face prices of tickets associated with each price type. You can also select specific programs to update with the edited price list.

When you update programs with the edited price list, all previous pricing is deleted and replaced with the new price list. However, there is an exception. If you have assigned custom prices to a program event, any changes you make to the price list associated with the program will not be reflected in the event with custom pricing. This is true even when the program is listed in the Programs to be updated grid. For more information about custom event pricing, see Assign Custom Ticket Prices to Program Events on page 193.

Delete Price Lists

After you add a price list, you can delete it when necessary. When you delete a price list, only the list is deleted. The prices on programs and program events are not deleted.

Instead of deleting a price list, you can make it inactive. For more information, see Mark Price Lists as Inactive on page 1.

Sales Methods

Customers purchase tickets from your organization in specific ways. For example, they purchase tickets over the phone or in person at a customer service desk or box office. The way a customer purchases a ticket is called a sales method. By default, the system includes every sales method your organization needs. The included sales methods are Daily Sales, Advance Sales, Group Sales, and Online Sales.

During initial setup and as needed, you configure the sales methods to meet the specific needs of your organization. For example, you determine the delivery methods that are valid for each method, as well as designate the forms of payment accepted. You can also configure the price types that are available for each sales method and add specific discounts and fees to each.

For more information, see Configure Sales Methods on page 31.

Configure Sales Methods

When you configure sales methods, you determine the delivery methods, fees, forms of payment, and price types that are valid for each method. For example, the delivery methods required for Daily Sales and Advance Sales will be different. For Daily Sales, the patron receives their tickets immediately. However, with Advance Sales, they can pick up their tickets at will call or have them shipped to an address. The delivery methods assigned to each sales method should reflect these differences.
If you do not need a specific sales method, you should make that method inactive. For example, if your organizations sells tickets to walk-up customers and processes phone orders for future events, you will configure both the Daily Sales and Advance Sales methods. If your organization only sells tickets to walk-up customers, you should make the Advance Sales method inactive.

After you configure sales methods, you can adjust them as needed. If specific delivery methods, fees, forms of payment, or price types become invalid, you can remove them from the sales method.

**Tip:** To quickly access the Daily and Advance sales methods, from the Sales Document Templates page, click **Daily sales method options** or **Advance sales method options** found under **Setup**. These shortcuts also appear on the Configure Daily Sales page under **Configuration**.

**Note:** Before you configure sales methods, a user with the required security rights and system role must add delivery methods, fees, and price types to the system. These will be assigned to specific sales methods during the configuration process.

Add Delivery Methods to a Sales Method

Delivery methods determine how a patron receives the tickets they purchase. Common delivery methods include will call, standard mail, and overnight mail. The delivery methods you add to each sales method should provide the options required by the specific method of sale. For example, the delivery methods required for Daily Sales and Advance Sales will be different. For Daily Sales, the patron receives their tickets immediately. However, with Advance Sales, they can pick up their tickets at will call or have them shipped to an address. The delivery methods assigned to each sales method should reflect these differences.

**Add delivery methods to a sales method**

**Tip:** To quickly access the Daily and Advance sales methods, from the Sales Document Templates page, click **Daily sales method options** or **Advance sales method options** found under **Setup**.

1. From **Tickets**, under **Configuration**, click **Sales Methods**. The Sales Methods page appears.
2. Click a sales method to configure. The sales method record appears.
4. Select a delivery method that is valid for this sales method. For example, your organization may offer standard mail, overnight mail, and will call delivery methods for Advance Sales. The delivery methods you select here are the only delivery options that will be offered at the point of sale for the selected sales method.
5. To use this delivery method as the default for transactions processed through the selected sales method, select **Set as default delivery method**.
6. In the **Receipt default** field, select the default method of printing the receipt from Daily Sales or Advance Sales. The options available (Print receipt, Email receipt, or No receipt) are those made active on the Itemized Receipt Options tab. For more information, see **Define itemized receipt options on page 36**.
7. Click **Save**. Repeat this process to add each delivery method that should be valid for this sales method.
**Note:** If a delivery method is no longer valid for this sales method, in the grid, select the delivery method and click **Remove**. A confirmation message appears. Click **Yes** to remove the delivery method.

**Remove Delivery Method**

If a delivery method is no longer valid for this sales method, in the grid, select the delivery method and click **Remove**. A confirmation message appears. Click **Yes** to remove the delivery method.

**Select a Default Delivery Method for a Sales Method**

After you add delivery methods to a sales method, you can select a default delivery method. On the sales methods record, a green check mark indicates the default delivery method. If you have the proper security rights, you can change the default delivery method. If not, you can change the delivery method during the sales process.

**Select a default delivery method**

1. From Tickets, under **Configuration**, click **Sales Methods**. The Sales Methods page appears.
2. Click a sales method. The sales method record appears.
3. On the Delivery Methods tab, select a delivery method and click **Set as default** on the action bar. The delivery method is marked as default.

**Note:** When you add delivery methods you can also set them as the default method. From the Add a delivery method screen, select **Set as default delivery method**. After you save the delivery method, a green checkmark appears next to it in the grid. For information about how to add a delivery method to a sales method, see [Add Delivery Methods to a Sales Method on page 32](#).

**Add Fees to a Sales Method**

Fees are additional charges added to an order. When you configure sales methods, you can add specific fees to sales methods. This provides the capability to charge fees for purchases based on the method of sale. For example, you can charge a handling fee for purchases made through Advance Sales.

**Add fees to a sales method**

1. From Tickets, under **Configuration**, click **Sales Methods**. The Sales Methods page appears.
2. Click a sales method to configure. The sales method record appears.
3. Access the Fees tab. On the action bar, click **Add**. The Add a fee screen appears.
4. Select a fee that is valid for this sales method. Any fees assigned here will be applied to purchases made through this sales method.
5. Click **Save**. Repeat this process to add each fee that should be valid for this sales method.

**Note:** If a fee is no longer valid for this sales method, in the grid, select the fee and click **Remove**. A confirmation screen appears. Click **Yes** to remove the fee.
Add Payment Methods to a Sales Method

Payment methods determine how a patron can pay for a purchase. Because payment methods are system defaults, you cannot add or delete them. Instead you assign only those that are relevant for each sales method. For example, with Daily Sales, most organizations will accept cash or credit cards. However, for Advance Sales, which are usually handled over the phone, credit cards are usually accepted but cash is not an option.

➤ Add payment methods to a sales method

1. From Tickets, under Configuration, click Sales Methods. The Sales Methods page appears.
2. On the Sales Methods page, click a sales method to configure. The sales method record appears.
4. Select a payment method that is valid for this sales method.
5. Click Save. Repeat this process to add each payment method that should be valid for this sales method. The payment methods you add are the only forms of payment that will be accepted at the point of sale for the selected sales method.

Note: If a payment method is no longer valid for this sales method, in the grid, select the payment method and click Remove. A confirmation message appears. Click Yes to remove the payment method.

Remove Payment Methods

If a payment method is no longer valid for this sales method, in the grid, select the payment method and click Remove. A confirmation message appears. Click Yes to remove the payment method.

Prohibit Price Types for a Sales Method

A price type is a category of tickets that you can allow or prohibit for each sales method. By default, all price types are allowed for each sales method. For example, your organization may have Adult, Student, Child, and Senior price types that should be available through both Daily Sales and Advance Sales. However, you may have a special walk-up only price type that is available two hours before closing. If this is the case, you would prohibit this special price type for all sales methods except Daily Sales.

➤ Prohibit price types for a sales method

1. On the Sales Methods page, click a sales method to configure. The sales method record appears.
2. Access the Price Types tab. All price types are displayed. Those that are currently allowed are marked with a green checkmark.
3. Select a price type to prohibit for this sales method and on the action bar, click **Prohibit price type**. A confirmation method appears.

4. Click **Yes**. The selected price type is now prohibited for purchases made through this sales method.

**Note:** To allow price types that are currently prohibited, from the sales method record, select the price type to allow, and click **Allow price type** on the action bar. A confirmation message appears. Click **Yes**. A green checkmark appears next to the price type.

### Define Itemized Receipt Options

You can configure which receipt printing options to make available on the Daily Sales, Advance Sales, and Group Sales pages. Printing the receipt is available by default, but you enable emailing a receipt or providing no receipt. For example, you can ask patrons their preference and if they decline a printed or emailed receipt, you can click the **No receipt** button. This option saves paper and moves patrons through the line more quickly.

You can also specify which receipt option to use as the default for each delivery method assigned to Daily, Advance, and Group Sales. For example, if you make email the default method for all in person sales in Daily Sales, the **Email Receipt** option will be selected by default on the Daily Sales page. However, if the patron asks for a printed receipt, you can select the **Print receipt** button instead, if the print option is active. For more information about changing the selected default method, see [Edit Receipt Default on page 27](#).

For emailed receipts, you must also configure the email template. The template includes a customizable introduction and closing, and details about the order such as the order number, receipt date, items, prices, discounts, and total. You must enter a **Subject**, **From address**, and **From name** for the email.

If the patron is a constituent, his or her email addresses appear automatically in the email field and you can select which address to use for the receipt. You can also enter an additional email address that is
Define itemized receipt options

1. From the Sales Methods page, click Daily Sales, Advance Sales, or Group Sales. The record opens.

2. Select the Itemized Receipt Options tab. There are 3 printing options you can make available on the Daily Sales, Advance Sales, or Group Sales page: Print receipt, Email receipt, or No receipt. The Print receipt option is selected by default which is indicated by the green checkmark in the Active column.

   To enable Email receipt or No receipt, click the down arrows and select Mark active. To disable a receipt option, expand the row and click Mark inactive. You cannot mark an option inactive if it is set as the default for a delivery method.

3. Before you can enable email receipts, you must configure the email template. Expand Email receipt and click Email template. The receipt email screen appears.
4. Enter a **Subject**, **From address**, and **From name** for the email.

5. The **Email opening** section displays the default text that appears before the itemized information. You can use the HTML editor to update this text.

6. The **Email closing** section displays the default text that appears after the itemized information. You can use the HTML editor to update this text.

   **Note:** To add an image to the opening or closing of the email, click **Edit HTML Source** and enter a URL for the image. For example:

   ```html
   <p><img src="https://www.blackbaud.com/images/logo.png" alt="" /></p>
   ```

   Using the HTML editor, you can change the alignment and resize the image.

7. Click **Save** to return to the Itemized Receipt Options tab.

---

**Point of Sale Donations**

During the sales process, you can accept donations. This provides your organization with an opportunity to reach out and solicit a donation at the point of sale. For efficiency, you can process donations in the same transaction along with other purchases the patron makes. For example, a patron can buy tickets to an event, purchase a membership, and donate to your organization all through a single transaction.
For efficiency, you can configure a default amount and designation for donations processed through advance sales. After donation defaults are configured, when you add a donation to an order in advance sales, the default amount and designation are automatically displayed on the Add a donation form. This may be helpful if your organization receives the majority of point of sale donations in a common amount for the same campaign. The designation and amount you configure here are defaults only and can be changed when the donation is accepted.

**Note:** Fundraising purposes and their related designations must be added to the system before you can configure point of sale donations. You add fundraising purposes from the Fundraising page.

### Configure a default designation and amount for donations

The defaults you configure during this procedure apply only to donations processed through the Advance Sales screen. For information about donation defaults for the Daily sales screen, see Configure Donation Buttons on page 54.

1. From Tickets, under **Configuration**, click **Point of sale donations**. The Point of Sale page appears.
2. In the **Defaults** grid, select the blank row and click **Edit**. The Default donation screen appears.
3. In the **Designation** field, click the binoculars to search for the designation to use as the default for all sales methods that accept donations. You can change the designation at the point of sale regardless of the default.
4. In the **Amount** field, enter the most common donation amount you receive for the selected designation. You can change the amount at the point of sale regardless of the default.
5. Click **Save**. The default donation designation and amount are displayed in the grid. Now, when a user accepts a donation, the Add a donation screen will automatically display this designation and amount.

### Locations

In order to schedule events, you must first add locations. Each location you add has address information, contact information, and location capacity. After a location is added it is available for all event types. You can add, edit, or delete locations from the Event Locations page.

### Add Event Locations

You can add multiple locations at which to hold your events. You use event locations to manage information about the venues where you hold events. You can enter address information, contact information, and location capacity.

**Note:** The capacity you enter for a location is observed as the maximum capacity that location can hold. When you schedule events and select a location, the capacity defined for the location defaults in. However, you can change it as needed for the event.
Add an event location

1. From Tickets, under Configuration, click Locations. The Locations page appears.
2. Click Add. The Add a location screen appears.

3. Enter the location name, phone number, capacity, and address information. For more information about the items on this screen, see Add a Location Screen on page 39.
4. Click Save. You return to the Locations page.

Add a Location Screen

The table below explains the items on the Add a location screen. For information about how to access this screen, see Add Event Locations on page 38.

<table>
<thead>
<tr>
<th>Screen Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Enter the name of the location. If the location is a single area in a facility with multiple areas, make sure to specify the exact location where programs or events will be held.</td>
</tr>
</tbody>
</table>
### Screen Item Description

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Phone number</td>
<td>Enter the phone number for the location.</td>
</tr>
<tr>
<td>Capacity</td>
<td>Enter the total number of people the location accommodates. The <strong>Capacity</strong> field on the Add a location screen is not tied to the <strong>Capacity</strong> field on the actual event record. When you schedule events and select a location, the capacity defined for the location defaults in. However, you can change it as needed for the event.</td>
</tr>
<tr>
<td>Country</td>
<td>Select the country in which the location exists.</td>
</tr>
<tr>
<td>Address</td>
<td>Enter the street address of the location.</td>
</tr>
<tr>
<td>City</td>
<td>Enter the name of the city in which the location exists.</td>
</tr>
<tr>
<td>State</td>
<td>Select the state containing the location.</td>
</tr>
<tr>
<td>ZIP</td>
<td>Enter the Zip code for the location.</td>
</tr>
</tbody>
</table>

### Program Categories

Program categories are optional. They allow you to organize the programs you sell by type, such as Lecture, Exhibit, IMAX movie, or Walking tour. If your organization wants to use program categories, you can set them up in Administration prior to adding programs. By setting them up ahead of time, you can simply select the appropriate category during the add program process. If needed, you can also add categories when you add programs.

After you add a program category, you can edit or remove it as necessary. For example, if your organization no longer offers a certain type of program, you can delete the category. If a program category is no longer in use, but you do not want to delete it, you can make it inactive. Inactive program categories cannot be used when you add programs.

#### Add a program category

1. From Administration, click **Code tables** under **Data**. The Code Tables page appears.
2. Under **Program**, click the Program Category code table name. The Program Category Table Entries page appears.
3. On the action bar, click **Add**. The New table entry screen appears.
4. Enter the name of the program category you would like to add.
5. Click **Save**, you return to the Program Category Table Entries page.
Resources

Resources are people or items that may be needed for a program event or group order. For example, you may offer a program that needs a projector or other electronic equipment, chairs, or information packets. Before you can assign resources to an event or group order, the resources must be added to the system.

The Resources page is where you configure and manage the resources your organization assigns to program events and group orders. You can add, edit, and delete supplies/equipment resources, as well as mark resources inactive. You can also add, edit, or delete staffing resources. To access the Resources page, from Tickets, under Configuration, click Resources.

The Supplies/Equipment and Staffing tabs display each resource that currently exists in the system. When you add a new resource, it displays here. To open a resource record, click the link in the grid.

From an open supplies/equipment resource record, you can edit the resource name and description, type, category, quantity available, the amount needed for events, and the group sales costs. From an open staffing resource record, you can edit the resource name, description, quantity available, capacity per resource, screening plan, and group sales costs.

Manage Supplies/Equipment Resources

Supplies/equipment resources are items that may be needed for a program event or group order. For example, you may offer a program that needs a projector or other electronic equipment, chairs, or information packets.

When you add a resource to your database, you enter a name, description, type, category, and quantity available. If applicable, you can also select whether you need a resource on a per ticket basis. For example, you may always provide an information packet for every event participant. Also, you can choose to add a group sales cost to the resource. The pricing structure can be a flat rate or hourly rate per resource.

After you add a resource, you can access the resource record to perform additional configuration tasks. For example, you can add a program or view an event’s resources. Each individual resource record displays configuration details at the top of the screen. These details include the name and description, type, category, quantity available, pricing information, and status. From an open resource record, you can edit the resource name and description, as well as other details including quantity available, type, category, group sales costs, and group type requirements. For example, you may use group type requirements to ensure certain types of groups, such as school groups, use specific supplies/equipment resources when they visit. Additionally, if the consumable resource is calculated on a per ticket basis, you can change the number of resources needed per ticket.

When you delete a resource, it is removed from the database. If a resource is linked to an event, it cannot be deleted. Instead, you can mark it inactive. For more information see Mark Resources as Inactive on page 1.

Add a supply/equipment resource

1. From Tickets, under Configuration, click Resources. The Resources page appears.
2. On the Supplies/Equipment resources tab, on the action bar, click Add. The Add a supply/equipment resource screen appears.

![Supplies/Equipment resources Add screen](image)

3. Enter the name and description for the resource.

4. Select whether the resource is consumable or non-consumable. For example, a non-consumable resource is something you reuse such as a projector, electronic equipment, or chairs. A consumable resource is something you keep a quantity of on stock such as information packets, workbooks, or art materials.

5. In the Category field, select the group the resource belongs to. For example, you may have categories for audio/visual media, food, furniture, education, and crafts. To define categories, you edit the code table in Administration.

6. In the Quantity available field, enter the number of items that are available to use.

7. In the Quantity needed field, for consumable resources, select whether the amount of resources needed is specified on each event or on a per ticket basis. If it is based on per ticket, enter in the number of resources per ticket.

8. Under Group sales cost, select the pricing structure, No charge, Flat rate per resource, or Hourly rate per resource. If you select Flat rate per resource or Hourly rate per resource, enter the amount in the Cost per resource field.

9. Click Save. The resource record appears so you can perform additional configuration tasks. For example, you can add programs and taxes to the resource, as well as configure group type requirements. Group type requirements are helpful if certain types of groups, such as school groups, always use specific supplies/equipment resources when they visit.

Manage Staffing Resources

Staffing Resources are people who may be needed to work or volunteer for a program event or group visit. For example, you may need an event volunteer for exhibition openings or a tour guide for large groups. If applicable, you can also select whether you need a staffing resource on a per capacity basis. For example, your tour guides have a maximum of 20 participants. If a group has 100 participants, there will need to be 5 tour guide resources. Also, you can choose to add a group sales cost to the resource. The pricing structure can be a flat rate or hourly rate per resource.
After you add a staffing resource, you can access the resource record to perform additional configuration tasks. For example, you can add a program or view an event’s resources. Each individual resource record displays configuration details at the top of the screen. These details include the name, description, quantity available, capacity per resource, pricing structure, and cost per resource. From an open resource record, you can edit the name, description, quantity available, capacity per resource, screening plan, and group type requirements. For example, you may use group type requirements to ensure certain types of groups, such as school groups, use specific staffing resources when they visit.

When you delete a resource, it is removed from the database. If a resource is linked to an event, it cannot be deleted. Instead, you can mark it inactive. For more information see Mark Resources as Inactive on page 1.

**Add a staffing resource**

1. From Tickets, under Configuration, click Resources. The Resources page appears.
2. Select the Staffing Resources tab.
3. Click Add on the action bar. The Add a staffing resource screen appears.

4. Enter the name and description for the resource.
5. In the Quantity available field, enter the number of people who are available to work in that staffing resource position. For example, you have a total of 10 staff members able to give tours.
6. If the staffing resource need is based on the number of people in a group, in the Capacity per resource field, enter the number of people per staffing resource. For example, at your events, for every 50 attendees, you require one event volunteer.
7. In the Screening plan field, select the plan the staff members or volunteers must complete in order to qualify as a resource. This is optional and needed only if your organization screens staff. For example, you may require tour guides for school groups to complete an application, be interviewed by a staff member, and pass a background check.

If a screening plan does not exist for the staffing resource, you can select the button to add a new screening plan.

8. If this resource will be used for group sales, under Group sales cost, select the pricing structure. Select No charge, Flat rate per resource, or Hourly rate per resource. If you select Flat rate per resource or Hourly rate per resource, enter the amount in the Cost per resource field.

9. Click Save. The resource record appears so you can perform additional configuration tasks. For example, you can add programs and taxes to the resource, as well as configure group type requirements. Group type requirements are helpful if certain types of groups, such as school groups, always use specific supplies/equipment resources when they visit. If your organization requires volunteers and staff members to complete a screening plan, you can define screening plans and associate them with specific staffing resources.

Configure Program Resources

The process of adding programs to resources is helpful if you have already added programs to the system and know they will need a specific resource. If you have not yet add programs to the system, you can perform this task later or you can add resources to each individual program when they are added to the system.

From an open supply/equipment or staffing resource record, on the Programs tab, you can add, edit, and delete a program for a resource. When you add a resource to a program, it automatically adds the resource to all new events scheduled for that program. Existing program events are not affected.

You can also access program records directly from the Programs tab on a resource. To go to a program record, click the program name in the grid. The program record appears and you can make adjustments as necessary.

Add programs to a resource

1. From Tickets, under Configuration, click Resources. The Resources page appears.

2. Click the resource to which you want to add a program. The resource record appears.

3. Select the Programs tab.

4. On the action bar, click Add. The Add program to resource screen appears.

5. In the Program field, click the magnifying glass and use the Active Program Search screen to find and select a program to add to the resource.

6. In the Resources needed field, enter the number of resources the program requires for each event. If the resource calculates the number needed on a per ticket basis, this field is disabled.

7. If you are on a staffing resource, in the Filled by field, select they type of staff member who will usually fill this resource role, for example, “Volunteer.”

8. Click Save. You return to the resource record.
Search for Active Scheduled Programs

The Active Program Search screen helps you locate scheduled programs that are active in the system. On this screen, you can search by program name, location, or category. For information about how to access this screen see Configure Program Resources on page 44.

After you have entered the necessary criteria, click Search. All programs that satisfy your criteria appear in the under Results.

Configure Group Resources

If this resource will be used for group sales, you can use group type requirements to ensure certain types of groups use specific, required resources when they visit. For example, you require K-4 school groups to have workbooks for each student and extra staffing resources to help monitor the students. If you specify group type requirements on a resource, when an itinerary is added with a group type selection, all resources associated with the group type are automatically added.

You set up the group types on the Group Type code table in Administration. We recommend you set up as many distinct group types as you need. For example, if you often host school visits, set up multiple group types for the different grade ranges because you may have different requirements for elementary, middle, and high school groups.

After you add a group type requirement to a resource, when you edit you can only change the quantity needed. If the group type requirement is no longer needed, on the action bar, click Delete.

Add a group type requirement to a supply/equipment resource

1. From Tickets, under Configuration, click Resources. The Resources page appears.
2. On the Supplies/Equipment resources tab, click the supplies/equipment resource for which you want to add a group type requirement. The resource record opens.
3. Select the Group Type Requirements tab.
4. On the action bar, click Add. The Add group type to resource screen appears.
5. Select the group type, for example, elementary school, middle school, high school, teachers, or college. If the group type does not exist, enter the name in the Group type field. A confirmation message appears.
6. In the Quantity needed field, enter how many resources are required for the group type.
7. Click Save. You return to the resource record.

Add a group type requirement to a staffing resource

1. From Tickets, under Configuration, click Resources. The Resources page appears.
2. On the Staffing resources tab, click the staffing resource to which you want to add a group type requirement. The resource record opens.
3. Select the Group Type Requirements tab.
4. On the action bar, click Add. The Add group type to resource screen appears.
5. Select the group type, such as elementary school, middle school, high school, teachers, or college. If the group type does not exist, enter the name in the Group type field. A confirmation message appears.

6. In the Quantity needed field, enter how many resources are required for the group type.

7. In the Filed by field, select the staff member who will usually fill this resource role, for example, “Volunteer.”

8. Select the job being performed or under Job Details, enter the name and description of the job. For example, you need a volunteer to help when the group type is Elementary. For the job being performed, you select School Visit Chaperone.

   **Note:** If you select a job being performed, the name and description default from the job type.

9. Click Save. You return to the resource record.

### Add Taxes to Resources

If your organization charges tax, you may need to add taxes to resource items you sell or rent. To add taxes to a resource, you access the specific resource record. When you add a tax to a resource, you select from a list of taxes that were previously created. For more information, see [Taxes on page 16](#).

#### Add a tax to a resource

1. From Tickets, under Configuration, click Resources. The Resources page appears.
2. Click the resource. The resource record appears.
3. Select the Taxes tab.
4. On the action bar, click Add. The Add a tax screen appears.

5. Select a tax that is valid for this resource. The taxes that appear in the list are defined on the Taxes page. For more information, see Taxes on page 16.

6. Click Save. You return to the resource record. Repeat this process to add each tax that is valid for this resource.

**Note:** If a tax method is no longer valid for this resource, in the grid, select the tax and click Remove. A confirmation message appears. Click Yes to remove the tax.

**Define Screening Plans**

If your organization requires volunteers and staff members to complete a screening plan, you can define screening plans and associate them with specific staffing resources. A screening plan is a list of steps a volunteer or staff member is required to complete to be eligible for a specific job within your organization.

You can define multiple screening plans for your various staffing resources. For example, you may require an interview and training before your volunteers or staff members become guides for the walking tour.

**Tip:** You associate the screening plan with the staffing resource when you add or edit the staffing resource.

**Add a screening plan**

1. From the Resources page, under Configuration, click Screening Plans. The Screening Plans page appears.

2. In the Screening Plans grid, on the action bar, click Add. The Add screening plan screen appears.

3. Enter a name for the screening plan.

4. Enter a description for the screening plan. For example, explain what the screening plan qualifies the volunteer or staff member to do.

5. In the Steps grid, you outline the specific actions the volunteer or staff member must complete. In the Action column, select or add an action and in the Days to Complete column, enter the number of days the volunteer or staff member has to complete the action.

**Note:** You can add screen plan steps or “actions” in the grid as you go or select from predefined steps added to the Screening Plan Step code table in Administration. This is a “Volunteer” code table.

6. Click Save. You return to the Screening Plans page.

**View Scheduled Resources**

On the Schedule tab, you can view which program events, itineraries, and itinerary items require the supply/equipment or staffing resource. When you use the Type, Program, and Date range fields you
can filter the events that have the resource selected. To filter the events, select the program and date range and click **Apply**. To remove the filter and see all the events which need the resource, click **Reset**.

To go to a program event record or an itinerary, click the name in the grid. The program event record or itinerary appears. On the program event record or itinerary you can make adjustments as necessary. For more information about program events, see the Program Events section. For more information about itineraries, see the Configure Group Itineraries section.

### Configure Daily Sales Page

From *Tickets*, you can create sales buttons for the Daily Sales page. You can configure buttons such as daily admission, memberships, and discounts. We recommend that you create buttons for all your daily admission price types and your most common transactions. As you configure the daily sales buttons, you can preview and edit them as necessary. Also, you can set each button as active or inactive. For example, if you have an annual holiday concert in December, you can mark the button active in December and then mark it inactive in January.

### Create Daily Admission Buttons

You configure daily admission buttons to sell admission tickets from the Daily Sales page. You use daily admission buttons to sell items such as adult and child admission tickets. You can create buttons for each price type.

> **Add a daily admission button**

1. From *Tickets*, click **Configure daily sales page**. The Configure Daily Sales page appears.
2. Click **Add, Daily admission**. The Add a daily admission sales button screen appears.

![Add a daily admission sales button](image)

3. Select a program and price type.
4. To mark the button as inactive, clear **Mark button active**.
5. Under **Button display options**, select up to three rows of data to display on the button. You can display the price type name, program name, price, or custom text on each row. To add custom text, select “Custom” and enter the text in the field that appears.

Under **Button preview**, a preview of the button appears.

6. Click **Save**. You return to the Configure Daily Sales page.

**Edit a daily admission button**

1. On the Configure Daily Sales page, select a daily admission button and click **Edit**. The Edit a daily admission sales button screen appears.

2. Make changes as necessary.

3. Click **Save**. You return to the Configure Daily Sales page

### Create Membership Buttons

You configure membership buttons to sell memberships from the Daily Sales page. You can create buttons for each membership level your organization offers.

**Add a membership button**

1. From **Tickets**, click **Configure daily sales page**. The Configure Daily Sales page appears.

2. **Click Add, Membership.** The Add a membership sales button screen appears.

3. Select a program, level, term, and type of membership for the button.

4. To mark the button as inactive, clear **Mark button active.**
5. Under **Button display options**, select up to three rows of data to display on the button. You can display the level, term, price, program, term and price, or custom text on each row. To add custom text, select “Custom” and enter the text in the field that appears.

Under **Button preview**, a preview of the button appears.

6. Click **Save**. You return to the Configure Daily Sales page.

Create Membership Promotion Buttons

You configure membership promotions buttons to apply membership promotions from the Daily Sales page. You can create buttons for each membership promotion your organization offers.

**Add a membership promotion button**

1. From **Tickets**, click **Configure daily sales page**. The Configure Daily Sales page appears.

2. Click **Add, Membership promotion**. The Add a membership promotion sales button screen appears.

3. Select if the membership promotion is added manually or with the entry of a promotional code, and select the name of the membership promotion from the drop-down menus.

4. To mark the button as inactive, clear **Mark button active**.

5. Under **Button display options**, select up to three rows of data to display on the button. You can display the name, value, calculation type, or custom text on each row. To add custom text, select “Custom” and enter the text in the field that appears.

Under **Button preview**, a preview of the button appears.

6. Click **Save**. You return to the Configure Daily Sales page.
Create Scheduled Program Buttons

You configure scheduled program buttons to sell tickets to schedule programs on the Daily Sales page. You can configure the buttons to show each event time or the next available time. You can also configure the buttons so you can select the event time.

Add a scheduled program button

1. From Tickets, click Configure daily sales page. The Configure Daily Sales page appears.
2. Click Add, Scheduled program. The Add a scheduled program sales button screen appears.

3. Select a scheduled program, price type and time options from the drop-down menus.
   - If you select One button for each event time, buttons appear on the Daily Sales page for each available time for the current day.
   - If you select One button for the next available time, a button appears on the Daily Sales page for the next available time.
   - If you only want the next available times for the current day, select Show today’s events only.
   - If you select Manually select the event time, a button appears on the Daily Sales page for the program name and price type. After you click the button, you can select the time.

4. To mark the button as inactive, clear Mark button active.

5. Under Button display options, select up to three rows of data to display on the button. You can display the price type name, program name, price and capacity, event time, price, capacity, event date, or custom text on each row. To add custom text, select “Custom” and enter the text in the field that appears.
   Under Button preview, a preview of the button appears.

6. Click Save. You return to the Configure Daily Sales page.
Create Combination Buttons

If you have combinations in the program, you can configure buttons to sell from the Daily Sales page. A combination is a package of two or more items. For example, an admission ticket and a ticket to a scheduled program. You can create buttons for any available combination and price type in the program.

Add a combination button

1. From Tickets, click Configure daily sales page. The Configure Daily Sales page appears.
2. Click Add, Combination. The Add a combination sales button screen appears.

![Add a daily admission sales button]

3. Select the combination and price type.
4. To mark the button as inactive, clear Mark button active.
5. Under Button display options, select up to three rows of data to display on the button. You can display the price type name, combination name, or custom text on each row. To add custom text, select “Custom” and enter the text in the field that appears.
   Under Button preview, a preview of the button appears.
6. Click Save. You return to the Configure Daily Sales page.

Configure Event Registration Buttons

You can configure event registration buttons to register patrons for events such as golf tournaments and reunions on the Daily Sales page.

Add an event registration button

1. From Tickets, click Configure daily sales page. The Configure Daily Sales page appears.
2. Click **Add, Event registration**. The Add a daily sales event registration button screen appears.
3. Select the event and price type.
4. To mark the button as inactive, clear **Mark button active**.
5. Under **Button display options**, select up to three rows of data to display on the button. You can display the event name, price type, event time, capacity, event date, event location, or custom text on each row. To add custom text, select “Custom” and enter the text in the field that appears.
6. Click **Save**. You return to the Configure Daily Sales page.

### Configure Discount Buttons

You configure discount buttons to apply discounts from the Daily Sales page. By default, a discount button appears on the Daily Sales page when you configure discounts in the program. However, if specific discounts are used more often than others, we recommend you create separate discount buttons.

### Add a discount button

1. From **Tickets**, click **Configure daily sales page**. The Configure Daily Sales page appears.
2. Click **Add** and select **Discount**. The Add a discount sales button screen appears.
3. Select the discount type and name.
4. To mark the button as inactive, clear **Mark button active**
5. Under **Button display options**, select up to three rows of data to display on the button. You can display the discount name, value, calculation type or custom text on each row. To add custom text, select “Custom” and enter the text in the field that appears.

Under **Button preview**, a preview of the button appears.

6. Click **Save**. You return to the Configure Daily Sales page.

**Configure Donation Buttons**

You configure donation buttons to accept donations from the Daily Sales page.

> **Add a donation button**

1. From *Tickets*, click **Configure daily sales page**. The Configure Daily Sales page appears.
2. Click **Add, Donation**. The Add a donation sales button screen appears.

![Add a donation sales button](image)

3. Select a designation and enter the default donation amount.
4. To mark the button as inactive, clear **Mark button active**.
5. Under **Button display options**, select up to three rows of data to display on the button. You can display the designation name, default donation amount, or custom text on each row. To add custom text, select “Custom” and enter the text in the field that appears.

Under **Button preview**, a preview of the button appears.

6. Click **Save**. You return to the Configure Daily Sales page.

**Delete Sales Buttons**

To delete a button, select the button on the Configure Daily Sales page and click **Delete**. On the confirmation message that appears, click **Yes**. If you will need to use the button again in the future, you
should mark it as inactive and not delete it. For information about how to mark a button as inactive, see Mark Buttons As Active or Inactive on page 55.

**Mark Buttons As Active or Inactive**

On the Configure Daily Sales page, the Active column displays the status of each button. To mark a button as inactive, select it and click Mark inactive. To mark a button as active, select it and click Mark active.

**Define Daily Sales Button Display Order**

After you configure Daily Sales buttons, you can define the order in which they will appear on the Daily Sales page. We suggest you place buttons of the same type together, such as all admission options in the same row, all scheduled programs in the same row, and all membership buttons in the same row. As you define the order of buttons, you can also set buttons you do not want to display on the Daily Sales page as inactive, such as if a certain scheduled program only runs through specific months and you no longer want the button to display after those months have passed.

➤ **Set Daily Sales button display order**

1. From Tickets, click Configure daily sales page. The Configure Daily Sales page appears.
2. In either the Default daily sales buttons or User-configured daily sales buttons grid, click Set button order on the action bar. The Set button order screen appears.

![Set button order](image)

3. By default, each button you create appears at the bottom of the Active buttons grid. Select a button and use the left and right arrows to determine which buttons should be active or inactive on the Daily Sales page.
Note: Daily Sales page buttons placed in the Inactive buttons grid are made inactive and do not display on the Daily Sales order page.

4. Use the up and down arrows to determine the order in which active buttons should display on the Daily Sales page. The first button in the list will appear in the first position on the Daily Sales page, and the rest will follow in order.

Note: Each page contains eight rows of buttons, with three buttons in each row.

5. Click Save. You return to the Configure Daily Sales page. The next time you access the Daily Sales page, your buttons will appear in the order you defined.

Create Marketing Surveys

You can use marketing surveys to capture information about patrons. The program includes a Zip code survey to capture Zip code information and a configurable questionnaire. You can choose to mark surveys active or inactive as necessary. We recommend you activate only one configurable questionnaire at a time. Typically, the questionnaire is relevant to a particular promotion or event. For example, you may want to know how a patron heard about an event to see if a marketing campaign is effective. After you add a user-defined survey question, you can view the questions and responses at the bottom of the page.

Note: If a patron is associated with an order and their record contains a ZIP code, the Zip code survey does not appear. This is because the program uses the information on the record.

Add a user-defined survey question

1. From Tickets, click Configure daily sales page. The Configure Daily Sales page appears.
2. Under Tasks, click Marketing surveys. The Marketing Surveys page appears.
3. Click Add. The Add a new survey question screen appears.
4. Enter the name of the marketing survey and the question to ask patrons. If you do not want the question to be active, clear Mark question active.
5. In Answers, enter responses for the question. If you do not want a response to be active, clear the corresponding checkbox under Active.
6. Click Save. You return to the Marketing Surveys page.

Edit a user-defined survey question

1. From Tickets, click Configure daily sales page. The Configure Daily Sales page appears.
2. Under Tasks, click Marketing surveys. The Marketing Surveys page appears.
3. Select a user-defined survey question to edit, and click Edit. The Edit a survey question screen appears.
4. Make the necessary changes and click Save. You return to the Marketing Surveys page.
Delete a user-defined survey question

1. From Tickets, click Configure daily sales page. The Configure Daily Sales page appears.
2. Under Tasks, click Marketing surveys. The Marketing Surveys page appears.
3. Select a user-defined survey question, and click Delete. A confirmation screen appears.
4. Click Yes. The program removes the user-defined survey. You return to the Marketing Surveys page.

Link Other Payment Methods

When you add other payment methods such as gift certificates, you can select whether to link those payment methods to deposits. To link other payment methods, go to Tickets and click Payment methods under Configuration. The Payment Methods page appears. Select a payment method and click Link to deposit. To remove a payment method from a deposit, select it and click Unlink from deposit.

For information about how to add other payment methods see the Administration Guide.

If you link other payment methods to a deposit, when you run the sales deposit process any payments in the form of that method are added to a sales deposit.

For information about how to run the sales deposit process see the Sales Guide.

Note: You can add "Other" payment methods from, Administration, click Code Tables, under the Revenue category.

Ticket Scanning Options

Ticket scanning options are a way for you to set when to start and stop accepting tickets for entry. For example, you can set to accept tickets 90 minutes before an event begins and stop accepting tickets 30 minutes after. If a ticket is scanned 91 minutes before or 31 minutes after, the ticket is invalid. You can also set when to count a ticket as scanned. This option is specifically for tickets sold through the Daily sales page on the day of the event.

Edit Ticket Scanning Options

1. From Tickets, click Ticket scanning options. The Ticket Scanning Options page appears.
2. Click Edit. The Edit ticket scanning options screen appears.
3. In the first row, enter how many minutes before a scheduled event begins tickets are accepted. For example, if you want to accept tickets an hour before an event, enter "60" in the text field.
4. In the second row, enter how many minutes after a scheduled event begins to stop accepting tickets. For example, if you want to stop accepting tickets five minutes after an event begins, enter "5" in the text field.
5. In the third row, select when tickets sold through Daily sales on the day of the event are counted
as attended. If you select **Once the ticket is scanned**, the tickets are counted as attended when a ticket is scanned and if you select **Once the ticket is sold**, the tickets are counted as attended after you complete an order.

6. Click **Save.** The options are saved and you return to the Ticket Scanning Options page.

**Configure Guest Passes**

Guest services managers can enable this feature so that guest passes can be issued and redeemed as a member benefit or constituent offer.

- Guest passes are issued automatically when a patron purchases a new membership or renews a qualifying membership. You can also issue passes on a constituent record. Issued passes appear in the **Benefits and sent items** section of the member's record and on the Guest Passes tab of their constituent record.

- Guest passes are redeemed in **Daily Sales.** Printed passes aren't necessary—you simply need some mechanism to verify the pass owner's identity. For example, a patron using an employer's guest pass can present their work ID, or a member can present their membership card or driver's license. **Note:** If you need to provide printed passes, you can use query fields to export guest pass information to a merge tool outside of **Altru.**

- If you later decide to turn off the guest passes functionality, the guest pass benefit will no longer be available for new membership programs and you won't be able to add guest passes to constituents. However, guests can still redeem valid guest passes that were already issued.

**Note:** You cannot turn off guest passes if the benefit is currently assigned to a membership level. You must delete the guest pass benefit from all membership levels and then select **Do not allow new guest passes to be issued.**

**Enable guest passes**

1. From **Tickets**, select **Guest Passes** under **Configuration.** The Guest Passes screen appears.
2. Select **Allow guest passes to be issued and redeemed.**
3. Under **Restrict passes to these programs,** select the programs guest passes may be redeemed for.
4. Click Save. A membership benefit named “System-generated Guest Pass” is added to the benefit catalog. You can edit the value and fulfillment information on the benefit.

Manage Registration Forms

From Tickets, under Configuration, click Manage registration forms, to access the Manager Registration Forms page. On this page, you can manage the sections and registration information of a form. Under Sections, you manage the sections that you want to appear on your forms and under Registration information, you manage the questions and notices/disclaimers you also want to appear on your forms.

Under Sections, you can add and edit the different sections as necessary. The sections are used to help you organize your forms.

After you add a question or disclaimer you can mark them inactive or delete them. To do this, under Registration information, select the row of a question or notice/disclaimer and click Mark inactive or Delete.

Note: You can only delete questions that have been used previously from the program. For example, if you no longer want to use a question from last year's summer camp, you have to delete the question from the summer camp program. You cannot delete it on Manage Registration Forms page.

All sections and registration information added here applies to all preregistered programs. You can manage what sections and registration information appear on which preregistered program, on the program event itself. For information about how to manage the forms on each program, see Manage Program Registration Information on page 174.
**Add or edit registration questions**

1. From *Tickets*, under **Configuration**, click **Manage Registration Forms**.

   *Note:* You can also add a new registration question from the Registration Information tab on a Program Event page. For information about the Registration Information tab, see *Manage Program Registration Information on page 174.*

2. Under **Registration information**, click **Add, Question**. The **Add a question** screen appears.

   *Note:* To edit a question, select it in the row and click **Edit**.

3. In **Field name**, enter the name of the field.

4. In **Field type**, select the type of field it is. For example, if you select **Dropdown list**, you can enter the dropdown options in the **Option** grid that appears.

   *Note:* You can use the up and down arrows to reorder the options in the grid.

5. If you want this question to be available for the web, select **Show online** and enter what you text you want to appear on the web, in the **Web text** field.

6. If you do not want this question to appear for all price types, clear the **Show for all price types** checkbox, and in the **Price type** grid, enter the price types for it.

7. After you are done, click **Save** to add the question.

**Add or edit registration notice/disclaimer**

1. From *Tickets*, under **Configuration**, click **Manage Registration Forms**.

   *Note:* You can also add a new notice/disclaimer from the Registration Information tab on a Program Event page. For information about the Registration Information tab, see *Manage Program Registration Information on page 174.*

2. Under **Registration information**, click **Add, Notice/disclaimer**. The **Add a notice/disclaimer** screen appears.

   *Note:* To edit a notice/disclaimer, select it in the row and click **Edit**.

3. In **Notice/disclaimer name**, enter the name of the field.

4. Under **Notice/disclaimer**, enter the notice or disclaimer text and use the editing tools to format it as necessary.

5. After you are done, click **Save** to add the question.
Discounts and Promotions
To drive sales and provide increased incentive for patrons to purchase items from your organization, such as admission tickets, scheduled event tickets, special events registrations, merchandise, and memberships, you can offer various promotions. Promotions include discounts, tickets sold together as combinations, and different membership promotions that encourage renewal, joining, and upgrading.
You can add and manage ticket and merchandise discounts, membership promotions, and combinations from the Tickets area of the program. For convenience, you can also add and manage both ticket and merchandise discounts from the Merchandise area.

Additionally, you can manage membership promotions from Memberships. For information about membership promotions, see the Memberships Guide.

### Ticket and Merchandise Discounts

A discount is a reduction in the price of tickets, merchandise, or services purchased from your organization. The discounts you configure and offer depend on the business processes of your organization. You can configure standard discounts that reduce the price of specific items purchased, or configure a standard discount that applies to an entire order. For more information about standard discounts, see Add Standard Discounts on page 64.

Additionally, you can configure discounts that require a purchase to receive the discount benefit. For example, you can configure a discount that gives the patron a 50% savings on a child admission when they buy two adult admissions at full price. Additionally, you can configure similar discounts that involve just merchandise items or both tickets and merchandise items. For more information about required purchase discounts, see Add Required Purchase Discounts on page 74.

You can also configure discounts that are based on the quantity of tickets or merchandise items purchased. For example, you can configure a discount that gives the patron a 20% discount on each ticket or merchandise item when they purchase five admission tickets or items. For more information about discounts based on quantity, see Add Quantity Discounts on page 83.

When setting up discounts for merchandise, you will also need to configure settings on the merchandise department records and merchandise item records to control what is eligible to be discounted. For example, on each department record, the Discounts allowed on items in this department checkbox determines whether items within the department are eligible for discounts. Additionally, you can control whether a specific item within a department can be discounted by selecting or clearing the Discounts allowed checkbox on each item record. For more information, see the Merchandise Guide.

**Note:** If your organization uses discounts, you must add debit and credit account and account code mappings that are used when generating GL distributions for discount revenue. For more information, see the "Manage GL Account Setup" section of the Administration Guide.

For all discounts, you can configure them to be applied automatically based on the items being purchased or manually by the seller. You can also configure discounts as promotion codes that are entered at the point of sale.

**Note:** When you add a discount, you configure one set of availability parameters that determine if the discount is applicable. However, after you add the discount you can configure additional availability parameters from the discount record. For more information, see Configure Discount Availability on page 89.
Add Standard Discounts

Standard discounts can be applied to any program or merchandise item your organization sells. Unlike required purchase discounts, standard discounts do not require patrons to purchase additional items to receive a discount. For example, you may configure a student discount that gives patrons with a student ID a 10% price reduction on tickets or merchandise purchases.

You can configure standard discounts to be applied to individual items or an entire order. If the discount is configured to apply to items, you can designate the specific programs and merchandise items for which the discount is valid. Additionally, you can restrict the discounts by sales method, day of the week, date, and time. You can also limit the discount to patrons with a specific address, membership, or constituency.

The following procedures guide you through the steps required to add a standard order discount and a standard item discount.

**Add a standard order discount**

1. From the Tickets page, under Discounts and promotions, click Ticket and merchandise discounts. The Discounts page appears.
2. Click Add and select Standard. The Add a standard discount screen appears. For information about the items on this screen, see Add a Standard Discount Screen on page 71.
3. Enter a name and description to identify the discount. The name and description are displayed at the point of sale when processing orders, on receipts and other order documentation, and on reports.
4. In the Selected for use field, select whether to apply the discount automatically, manually at the point of sale, or with the entry of a valid promotion code. If you select "With code," a grid appears for you to enter the promotion code and the dates when it is valid.
5. To apply the discount to entire orders, select “Order” in the Applies to field.

**Note:** To apply the discount to specific items instead of entire orders, select "Item." For more information, see Add a standard item discount on page 66.

6. In the Calculation type field, select whether to apply the discount as a set amount or a percentage, and then in the Value field, enter the discount. For example, a discount can be $5 off or 50% off an order.
7. For percentage discounts, the **Applies to merchandise, Applies to tickets** and **Applies to event packages** checkboxes appear. You can clear these checkboxes as necessary if the discount should not apply to certain types of items.

**Note:** If you select **Applies to merchandise, Applies to tickets** and **Applies to event packages**, the discount applies to all programs and merchandise in an order as long as availability requirements are met.

8. To set up restrictions for the discount, select the Availability tab. You can restrict the discount to specific sales methods, days, dates, and times. You can also limit the discount to specific memberships and constituencies.

![Discounts and Promotions](image)

**Note:** When you add a discount, you configure one set of availability parameters. After the discount is added, you can access the discount record and configure additional sets of availability parameters. These are commonly used for seasonal discounts that become available for a limited time for multiple instances throughout the year.

9. Under **Allow discount on orders sold via these sales methods**, select the sales methods to apply the discount to. By default, all sales methods except “Group Sales” are selected.

10. Under **Allow discount on orders sold on these days**, select the days of the week to offer the discount.
11. Under **Restrict discount to orders sold during these dates**, enter a date range when the discount is valid. For example, you might offer a special summer discount from June to August. If you do not enter a date range, the discount is not restricted.

12. Under **Restrict discount to orders sold during these times**, enter a time range when the discount is valid. For example, you might offer an admission discount from 10 a.m. to 2 p.m. If you do not enter a time range, the discount is valid for the entire day.

13. Under **Restrict discount to these memberships**, select the membership programs and levels whose members can use the discount. For example, a discount may only apply to active members of the Friends of the Museum membership program. If you do not select membership programs or levels, the discount is available to all members.

14. Under **Restrict discount to these constituencies**, use the grid to restrict the discount to specific constituencies. For example, a discount may only apply to board members or volunteer staff. If you leave the grid blank, the discount is available to all patrons.

15. Under **Restrict discount by patron address**, in the **Include** field, select a Constituents by Address smart query selection to restrict the discount to patrons of specific address criteria, such as County or Zip code. Selections are created from queries that use specified criteria to group records together. For example, you can create a selection from a query that will locate all patrons in your system that are from a certain Zip code. To select a Constituent by Address smart query selection, you can use the drop-down list, create a new smart query selection, or edit a previously selected smart query selection. If you leave the field blank, the discount is available to all patrons.
   • Select a Constituents by Address smart query selection to restrict the discount to patrons of specific address criteria.
   • To create a new Constituent by Address smart query selection, select **Add new smart query** from the drop-down list. The New Smart Query screen appears. You must save the query as a dynamic or static selection.
   • If you need to edit the Constituents by Address smart query previously selected, click the pencil to access the Smart Query screen to edit it as necessary. For example, if you need to include patrons from another Zip code, you can add the Zip code to the smart query.

**Note:** For more information about how to create a new smart query, edit a smart query, and create selections, see the **Query and Export Guide**.

16. Click **Save**. The discount record appears. From the discount record you can make changes to the discount as needed, for example, you can edit the availability restrictions. For more information, see **Manage Discounts on page 88**.

**Add a standard item discount**

1. From the Tickets page, under **Discounts and promotions**, click **Ticket and merchandise discounts**. The Discounts page appears.

2. Click **Add** and select **Standard**. The Add a standard discount screen appears. For information about the items on this screen, see **Add a Standard Discount Screen on page 71**.
3. Enter a name and description to identify the discount. The name and description are displayed at the point of sale when processing orders, on receipts and other order documentation, and on reports.

4. In the Selected for use field, select whether to apply the discount automatically, manually at the point of sale, or with the entry of a valid promotion code. If your select "With code," a grid appears for you to enter the promotion code and the dates when it is valid.

5. To apply the discount to specific items, select “Item” in the Applies to field.

**Note:** To apply the discount to entire orders instead of specific items, select "Order." For more information, see [Add a standard order discount on page 64](#).

6. In the Calculation type field, select whether to apply the discount as a set amount or a percentage. For example, a discount can be $5 off or 50% off an item.

7. After the Applies to merchandise checkbox, enter the amount or percentage to discount merchandise in the Value field. If this discount does not apply to merchandise, clear the checkbox.

**Note:** When you select Applies to merchandise, you can use the Merchandise tab to specify the items to discount. If you clear Applies to merchandise, the Merchandise tab is hidden.
8. After the **Applies to tickets** checkbox, select the price types to discount and enter the amount or percentage of the discount for each price type. For example, a discount can take $2 off Adult tickets and $1 off of Child tickets. To apply one discount to all price types, select "<any price type>." If the discount does not apply to tickets, clear the checkbox.

*Note:* When you select **Applies to tickets**, you can use the Programs tab to specify the programs to discount. If you clear **Applies to tickets**, the Programs tab is hidden.

9. Select the **Applies to event packages** checkbox if the discount applies to event packages. After the checkbox, select the package price types to discount and enter the amount or percentage of the discount for each price type. To apply one discount to all price types, select "<any price type>." 

*Note:* When you select **Applies to event packages**, you can use the Programs tab to specify the programs to discount. If you clear **Applies to event packages**, the Programs tab is hidden.

10. To limit how many times the discount can apply to items in a single order, select **Limit the number of times this discount may be applied** and then enter the limit in the **Uses allowed** field.

*Tip:* If the discount applies to a membership level with member add-ons and you want ticket discounts to be available to all members, make sure to set your ticket limit high enough to include both members and potential add-on members. If the combined number of members and add-on members exceeds the ticket limit, not all members will receive their ticket discounts.

11. To configure additional restrictions for the discount, select the Availability tab. On this tab, you can restrict the discount to specific sales methods, days, dates, and times. You can also limit the discount to specific memberships, constituencies, and patron addresses.
**Note:** When you add a discount, you configure one set of availability parameters. After the discount is added, you can access the discount record and configure additional sets of availability parameters. These are commonly used for seasonal discounts that become available for a limited time for multiple instances throughout the year.

12. Under **Allow discount on orders sold via these sales methods**, select the sales methods to apply the discount to. By default, all sales methods except “Group Sales” are selected.

13. Under **Allow discount on orders sold on these days**, select the days of the week to offer the discount.

14. Under **Restrict discount to orders sold during these dates**, enter a date range when the discount is valid. For example, you might offer a special summer discount from June to August. If you do not enter a date range, the discount is not restricted.

15. Under **Restrict discount to orders sold during these times**, enter a time range when the discount is valid. For example, you might offer an admission discount from 10 a.m. to 2 p.m. If you do not enter a time range, the discount is valid for the entire day.

16. Under **Restrict discount to these memberships**, select the membership programs and levels whose members can use the discount. For example, a discount may only apply to active members of the Friends of the Museum membership program. If you do not select membership programs or levels, the discount is available to all members.
17. Under **Restrict discount to these constituencies**, use the grid to restrict the discount to specific constituencies. For example, a discount may only apply to board members or volunteer staff. If you leave the grid blank, the discount is available to all patrons.

18. Under **Restrict discount by patron address**, in the **Include** field, select a Constituents by Address smart query selection to restrict the discount to patrons of specific address criteria, such as County or Zip code. Selections are created from queries that use specified criteria to group records together. For example, you can create a selection from a query that will locate all patrons in your system that are from a certain Zip code. To select a Constituent by Address smart query selection, you can use the drop-down list, create a new smart query selection, or edit a previously selected smart query selection. If you leave the field blank, the discount is available to all patrons.

- Select a Constituents by Address smart query selection to restrict the discount to patrons of specific address criteria.
- To create a new Constituent by Address smart query selection, select **Add new smart query** from the drop-down list. The New Smart Query screen appears. You must save the query as a dynamic or static selection.
- If you need to edit the Constituents by Address smart query previously selected, click the pencil to access the Smart Query screen to edit it as necessary. For example, if you need to include patrons from another Zip code, you can add the Zip code to the smart query.

**Note:** For more information about how to create a new smart query, edit a smart query, and create selections, see the *Query and Export Guide*.

19. If you selected **Applies to tickets** or **Applies to event packages** on the General tab, select the Programs tab. On this tab, in the grid, select the specific programs for which the discount is valid. If you do not specify programs in the grid, the discount is not available.

20. If you selected **Applies to merchandise** on the General tab, select the Merchandise tab. On this tab you determine the merchandise that should be discounted. You can apply the discount to all discountable merchandise, or you can limit the discount to specific departments or items. If you select “Specific departments” or “Specific merchandise,” also select the specific departments or items that should be discounted in the grid.
Note: When setting up discounts for merchandise, you configure settings on the merchandise department records and merchandise item records to control what is eligible to be discounted. For example, on each department record, the Discounts allowed on items in this department checkbox determines whether items within the department are eligible for discounts. Additionally, you can control whether a specific item within a department can be discounted by selecting or clearing the Discounts allowed checkbox on each item record.

21. Click Save. The discount record appears. From the discount record you can make changes to the discount as needed. For example, you can edit the availability restrictions and adjust the discounted programs or merchandise. For more information, see Manage Discounts on page 88.

Add a Standard Discount Screen

The table below explains the items on the Add a standard discount screen. For more information about how to access this screen, see Add Standard Discounts on page 64.

<table>
<thead>
<tr>
<th>Screen Item Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name and Description</td>
</tr>
<tr>
<td>On the General tab, enter the name of the discount and a description to help identify the discount. The name and description you enter will be displayed at the point of sale when processing orders, as well as on receipts and other order documentation, and on reports.</td>
</tr>
</tbody>
</table>
**Screen Item Description**

| Selected for use | Determine if discounts are added to the order automatically, manually, or with the entry of a valid promotion code. If your discount is to be added to the order with entry of a promotion code, enter the code and the dates that the code are valid.

To automatically apply the correct discount during the sales process, select Automatically. The discount is added automatically as the order is placed when the purchase meets the criteria on the Availability tab. Each time additional items are added to the order, the discount will be recalculated.

If the discount should be manually applied by the Admission Coordinator, select Manually. For example, after the patron orders an admission ticket and presents a AAA membership card, the Admissions Coordinator selects the configured discount.

If the discount should be applied when the patron presents a valid promotion code accepted by your organization, select With code. For example, after the patron orders an adult admission ticket and provides a coupon from the local newspaper, the Admissions Coordinator enters the code printed on the coupon, and if necessary, the dates the code is valid. |
<table>
<thead>
<tr>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Applies to</td>
</tr>
<tr>
<td>Calculation type and Value</td>
</tr>
<tr>
<td>Applies to merchandise and Value</td>
</tr>
<tr>
<td>Applies to tickets</td>
</tr>
<tr>
<td>Applies to event packages</td>
</tr>
</tbody>
</table>
**Screen Item Description**

| **Price type and Value** | If you select **Applies to tickets**, a grid appears so you can limit the discount only to specific price types, as well as specify the value of the discount for each price type. For example, you can create a discount that provides $2 off of Adult tickets, and $1 off of Child tickets. To make the discount available for all price types, select `<any price type>`.
| **Limit the number of times this discount may be applied** | If you selected “Item” **Applies to** field, the **Limit the number of times this discount may be applied** option is available. To control the number of times the discount can be applied to a single order, select this option and enter the number of uses allowed.
| **Allow discounts on orders solid via these sales methods** | On the Availability tab, select a sales method or methods for which the discount can be applied. You can allow this discount for transactions processed through daily sales, advance sales, group sales, and online sales.
| **Allow discount on these days** | Select days of the week on which the discount is valid. For example, you might offer a special discount on Tuesdays.
| **Restrict discount to orders sold during these dates** | Use the **From** and **To** fields to select a date range during which the discount is valid. For example, you might offer a special summer discount from the months of June to August. If no date range is selected, the discount is not restricted.
| **Restrict discount to orders sold during these times** | Use the **From** and **To** fields to enter a block of time during which the discount is valid. For example, you might offer an admission discount from 10:00 a.m. to 2:00 p.m. If no time of day is selected, the discount is valid for the entire day.
| **Restrict discount to these memberships** | To restrict the discount to only active members of specific membership programs and levels, select the applicable membership programs and levels. For example, a discount may only apply to active members of the Friends of the Museum membership program. If no membership program or level is selected, the discount is available to all members regardless of membership program or level.
| **Restrict discount to these constituencies** | In the grid, select constituencies for which to restrict the discount. For example, a discount may only apply to board members or volunteer staff. If no constituencies are selected, the discount is available to all patrons. |
Screen Item Description

| Restrict discount by patron address | Under **Restrict discount by patron address**, in the **Include** field, select a Constituents by Address smart query selection to restrict the discount to patrons of specific address criteria, such as County or Zip code. Selections are created from queries that use specified criteria to group records together. For example, you can create a selection from a query that will locate all patrons in your system that are from a certain Zip code. To select a Constituent by Address smart query selection, you can use the drop-down list, create a new smart query selection, or edit a previously selected smart query selection. If you leave the field blank, the discount is available to all patrons.

Use the drop-down list to select a Constituents by Address smart query selection to restrict the discount to patrons of specific address criteria.

To create a new Constituent by Address smart query selection, select **Add new smart query from the drop-down list.** The New Smart Query screen appears. You must save the query as a dynamic or static selection.

If you need to edit the Constituents by Address smart query previously selected, click the pencil to access the Smart Query screen to edit it as necessary. For example, if you need to include patrons from another Zip code, you can add the Zip code to the smart query.

For more information about how to create a new smart query, edit a smart query, and create selections, see the "Smart Queries" section of the help file. |
| Programs tab | If you selected “Item” in the **Applies to** field on the General tab and selected **Applies to tickets**, the Programs tab appears. On the Programs tab, in the grid, you assign programs to the a per item discount so it can be used. The discount will only be available for the programs you assign to it. After you add a program to the discount, the discount is also added to all associated program events. If you do not add any programs to the discount, the discount cannot be used. |
| Merchandise tab | If you selected “Item” in the **Applies to** field on the General tab and selected **Applies to merchandise**, the Merchandise tab appears. On this tab you determine the merchandise that should be discounted. You can apply the discount to all discountable merchandise, or you can limit the discount to specific departments or items. If you select “**Specific departments**” or “**Specific merchandise**,” also select the specific departments or items that should be discounted in the grid. |

Add Required Purchase Discounts

Unlike standard discounts that can be applied to any program or merchandise item your organization sells, required purchase discounts require the patron to buy specific items in order to receive the discount. For example, you can configure a required purchase discount that gives the patron one free or discounted admission ticket when they purchase at least one admission ticket at full price. Additionally, you can configure similar discounts that involve only merchandise items or both tickets and merchandise items.
When you configure a required purchase discount, you specify the item and quantity the patron is required to purchase in order to receive a discount, as well as the number of items to which a discount can be applied. You can configure required purchase discounts that mix tickets and merchandise. You are not limited to one or the other. Additionally, you can restrict discounts by sales method, day of the week, date, and time. You can also limit the discount to patrons with a specific address, membership, or constituency.

**Note:** To improve performance on sales screens, required purchase discounts have these requirements:

- You can apply only one required purchase discount per sales order. If you attempt to apply more than one required purchase discount, you receive a message that says the first discount will be removed automatically. **Note:** You can apply a single required purchase discount to multiple items in the order if the discount is configured to be "unlimited."

- Required purchase discounts cannot be used if there are more than 5 types of tickets or merchandise items in the cart. "Types" refers to unique line items in the cart, not the total number of items. There are no limits on other types of items you can purchase, such as donations or memberships. For example, you can have 3 types of merchandise, 2 types of tickets, and a donation.

- If you apply a required purchase discount and then add 1 or more types of tickets or merchandise items (which puts you over the 5 type limit), you receive a message that says you must remove some items to apply this discount. If a required purchase discount is applied to an order and then you add an item and go over the 5 type limit, the discount is removed automatically and you receive a similar message telling you to remove some items to apply this discount.

**Note:** With the 4.91 release, required purchase discounts cannot be applied automatically — they must be applied manually or with a promotion code. All automatic required purchase discounts created prior to the 4.91 release were converted to apply manually.

**Add a required purchase discount**

1. From the Tickets page, under Discounts and promotions, click **Ticket and merchandise discounts**. The Discounts page appears.

2. Click **Add** and select **With required purchase**. The Add a discount requiring a purchase screen appears. For more information about the items on this screen, see [Add a Discount Requiring a Purchase Screen on page 79](#).

3. Enter a name and description to identify the discount. The name and description you enter here will be displayed at the point of sale when processing orders, on receipts and other order documentation, and on reports.

4. In the **Selected for use** field, select whether to apply this discount to the order manually at the point of sale or by entering a valid promotion code. If your discount requires a promotion code, enter the code and the dates that the code is valid.

5. Select the Purchase Details tab. On this tab, you determine the quantity of tickets or merchandise that must be purchased to receive the discount. You also enter the quantity of tickets or merchandise that will be discounted, and any restrictions that may be placed on the number of times the discount can be used.
6. Under **Purchase these items**, in the **Item type** field, select “Tickets” or “Merchandise.” This is the type of item that must be purchased to receive a discount.

7. In the **Quantity at full price** field, enter the number of tickets or merchandise items the patron must purchase to receive the discount. If you selected “Tickets” in the **Item type** field, in the grid, you can specify price types for the required tickets. For example, the patron must purchase three adult admission tickets in order to receive the discount. If no price type is selected, the discount is available for all price types.

8. Under **Get discount on these items**, in the **Item type** field, select “Tickets” or “Merchandise.” This is the type of item that will be discounted if the required purchase is made.

9. In the **Quantity discounted** field, determine how many times you can receive the discount on your order. You can limit the discount to a specific quantity or make it unlimited. If you select “Specific quantity,” enter the number of items that can be discounted.

10. In the **Calculation type** field, select whether the discount will be calculated as a specific dollar amount or percentage.

11. If you selected “Tickets” in the **Item type** field under **Get discount on these items**, a grid is displayed. Select price types for which the discount can be applied and enter the value of the discount. For example, the patron purchases two adult admission tickets and receives a 50% discount on all child admission tickets purchased. To make the discount available for all price types, select <any price type>.

12. If you selected “Merchandise” in the **Item type** field under **Get discount on these items**, a **Value** field is displayed. Enter the value of the discount. Whether you enter an amount or percentage depends on your selection in the **Calculation type** field.
13. Under **Discount restrictions**, in the **Limit discount to** field, you can configure limitations that further define the required purchase discount.

- If you require tickets to be purchased in order to receive a discount on other tickets, you can limit the discount to the same event as the purchased event or the same program as the purchased event.
- If you require merchandise to be purchased in order to receive a discount on other merchandise, you can limit the discount to the same item or an item from the same department as the purchased merchandise. You can also select no restriction.

**Note:** If the discount includes both tickets and merchandise items, the **Limit discount to** field is not displayed.

14. To control the number of times the discount can be applied to a single order, select **Limit the number of times this discount may be applied** and enter the number of uses allowed.

15. The Programs tab appears if you selected “Tickets” on the Purchase Details tab. On this tab, you select the specific programs to discount or the programs that trigger the discount for merchandise. If you do not specify programs in the grid, the discount is not available.

16. The Merchandise tab appears if you selected “Merchandise” on the Purchase Details tab. On this tab, if applicable, you designate the qualifying purchase items and the items to be discounted when the required items are purchased. The qualifying merchandise to can be specific items, specific departments, or any merchandise. The merchandise items to be discounted can be limited to any discountable merchandise, any discountable department, specific merchandise, or specific departments.
17. To configure additional restrictions for the discount, select the Availability tab. On this tab, you can restrict the discount to specific sales methods, days, dates, and times. You can also limit the discount to specific memberships, constituencies, and patron addresses.

![Discount Availability Tab Image]

**Note:** When you add a discount, you configure one set of availability parameters. After the discount is added, you can access the discount record and configure additional sets of availability parameters. These are commonly used for seasonal discounts that become available for a limited time for multiple instances throughout the year.

18. Under **Allow discount on orders sold via these sales methods**, you can control whether this discount is available for all or just some sales methods. By default, all sales methods are selected except “Group Sales.” If the discount should apply only to specific sales methods, select or clear the applicable checkboxes.

19. Under **Allow discount on orders sold on these days**, you can control the days of the week that this discount is offered. If the discount is prohibited for specific days, clear the applicable checkboxes.

20. Under **Restrict discount to orders sold during these dates**, you can use the From and To fields to enter a date range during which the discount is valid. For example, you might offer a special summer discount from the months of June to August. If no date range is selected, the discount is not restricted.

21. Under **Restrict discount to orders sold during these times**, you can use the From and To fields to enter a block of time during which the discount is valid. For example, you might offer an admission discount from 10:00 a.m. to 2:00 p.m. If no time of day is selected, the discount is valid for the entire day.
22. Under **Restrict discount to these memberships**, use the grid to restrict the discount to specific membership programs and levels. For example, a discount may only apply to those patrons who are part of the Friends of the Museum membership program. If you leave the grid blank, the discount is available to all patrons.

23. Under **Restrict discount to these constituencies**, use the grid to restrict the discount to specific constituencies. For example, a discount may only apply to board members or volunteer staff. If you leave the grid blank, the discount is available to all patrons.

24. Under **Restrict discount by patron address**, in the **Include** field, select a Constituents by Address smart query selection to restrict the discount to patrons of specific address criteria, such as County or Zip code. Selections are created from queries that use specified criteria to group records together. For example, you can create a selection from a query that will locate all patrons in your system that are from a certain Zip code. To select a Constituent by Address smart query selection, you can use the drop-down list, create a new smart query selection, or edit a previously selected smart query selection. If you leave the field blank, the discount is available to all patrons.

- Select a Constituents by Address smart query selection to restrict the discount to patrons of specific address criteria.
- To create a new Constituent by Address smart query selection, select **Add new smart query** from the drop-down list. The New Smart Query screen appears. You must save the query as a dynamic or static selection.
- If you need to edit the Constituents by Address smart query previously selected, click the pencil to access the Smart Query screen to edit it as necessary. For example, if you need to include patrons from another Zip code, you can add the Zip code to the smart query.

**Note:** For more information about how to create a new smart query, edit a smart query, and create selections, see the **Query and Export Guide**.

**Note:** For more information about how to create a new smart query, edit a smart query, and create selections, see the “Smart Queries” section of the help file.

25. Click **Save**. The discount record appears. From the discount record you can make changes to the discount as needed. For example, you can edit the availability restrictions and adjust the purchase details. For more information, see **Manage Discounts on page 88**.

### Add a Discount Requiring a Purchase Screen

The table below explains the items on the Add a discount requiring a purchase screen. For more information about how to access this screen, see **Add Required Purchase Discounts on page 74**.

<table>
<thead>
<tr>
<th>Screen Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Name and Description</strong></td>
<td>On the General tab, enter the name of the discount and a description to help identify the discount. The name and description you enter will be displayed at the point of sale when processing orders, as well as on receipts and other order documentation, and on reports.</td>
</tr>
</tbody>
</table>
## Screen Item Description

<table>
<thead>
<tr>
<th><strong>Selected for use</strong></th>
<th>Select whether to add the discount to the order manually or with the entry of a valid promotion code. If you opt to use a promotion code, enter the code and the dates that the code are valid. If the discount will be manuallly applied, select <strong>Manually</strong>. For example, after the patron orders an admission ticket and presents a AAA membership card, the Admissions Coordinator selects the configured discount. If the discount will be applied when the patron presents a valid promotion code, select <strong>With code</strong>. For example, after the patron orders an adult admissions ticket and provides a coupon from the local newspaper, the Admissions Coordinator enters the code printed on the coupon, and if necessary, the dates the code is valid.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Item type</strong> (Purchase these items)</td>
<td>On the Purchase Details tab, select “Tickets” or “Merchandise.” This is the type of item that must be purchased to receive a discount.</td>
</tr>
<tr>
<td><strong>Quantity at full price and Price type</strong></td>
<td>In the <strong>Quantity at full price field</strong>, enter the number of tickets or merchandise items the patron must purchase to receive the discount. If you selected “Tickets” in the <strong>Item type</strong> field, in the grid, you can specify price types for the required tickets. For example, the patron must purchase three adult admission tickets in order to receive the discount. If no price type is selected, the discount is available for all price types.</td>
</tr>
<tr>
<td><strong>Item type</strong> (Get discount on these items)</td>
<td>Select “Tickets” or “Merchandise.” This is the type of item that will be discounted if the required purchase is made.</td>
</tr>
<tr>
<td><strong>Quantity discounted</strong></td>
<td>Select if an unlimited number or a specific quantity of tickets or merchandise items can be discounted in an order. If you select a specific quantity, enter the number of tickets or items that can be discounted in an order.</td>
</tr>
<tr>
<td><strong>Calculation type</strong></td>
<td>Select if the discount will be calculated as a specific dollar amount or a percentage off of the ticket or merchandise price.</td>
</tr>
<tr>
<td><strong>Price type and Value (grid)</strong></td>
<td>If you selected “Tickets” in the <strong>Item type</strong> field under <strong>Get discount on these items</strong>, a grid is displayed. Select price types for which the discount can be applied and enter the value of the discount. For example, the patron purchases two adult admission tickets and receives a 50% discount on all child admission tickets purchased. To make the discount available for all price types, select &lt;any price type&gt;.</td>
</tr>
<tr>
<td><strong>Value (field)</strong></td>
<td>If you selected “Merchandise” in the <strong>Item type</strong> field under <strong>Get discount on these items</strong>, a <strong>Value</strong> field is displayed. Enter the value of the discount. Whether you enter an amount or percentage depends on your selection in the <strong>Calculation type</strong> field.</td>
</tr>
</tbody>
</table>
**Screen Item Description**

<table>
<thead>
<tr>
<th>Screen Item Description</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Limit discount to</td>
<td>Configure limitations that further define the required purchase discount. If you require tickets to be purchased in order to receive a discount on other tickets, you can limit the discount to the same event as the purchased event or the same program as the purchased event. If you require merchandise to be purchased in order to receive a discount on other merchandise, you can limit the discount to the same item or an item from the same department as the purchased merchandise. You can also select no restriction.</td>
</tr>
<tr>
<td>Limit the number of times this discount may be applied and Uses allowed</td>
<td>If you want to limit the number of times the discount can be applied, select this checkbox. In the <strong>Uses allowed</strong> field, enter the amount of times the discount can be applied to an order. For example, the patron purchases three tickets to the dinosaur exhibit and can only receive a discount on one more ticket to the same exhibit.</td>
</tr>
<tr>
<td>Programs tab</td>
<td>The Programs tab appears if you selected “Tickets” on the Purchase Details tab. On this tab, you select the specific programs to discount or the programs that trigger the discount for merchandise. If you do not specify programs in the grid, the discount is not available.</td>
</tr>
<tr>
<td>Merchandise tab</td>
<td>The Merchandise tab appears if you selected “Merchandise” on the Purchase Details tab. On this tab, if applicable, you designate the qualifying purchase items and the items to be discounted when the required items are purchased. The qualifying merchandise to be specific items, specific departments, or any items. The merchandise to be discounted can be limited to any discountable merchandise, any discountable department, specific merchandise, or specific departments.</td>
</tr>
<tr>
<td>Allow discounts on orders solid via these sales methods</td>
<td>On the Availability tab, select a sales method or methods for which the discount can be applied. You can allow this discount for transactions processed through daily sales, advance sales, group sales, and online sales.</td>
</tr>
<tr>
<td>Allow discount on these days</td>
<td>Select days of the week on which the discount is valid. For example, you might offer a special discount on Tuesdays.</td>
</tr>
<tr>
<td>Screen Item Description</td>
<td>Description</td>
</tr>
<tr>
<td>------------------------</td>
<td>-------------</td>
</tr>
<tr>
<td><strong>Restrict discount to orders sold during these dates</strong></td>
<td>Use the From and To fields to select a date range during which the discount is valid. For example, you might offer a special summer discount from the months of June to August. If no date range is selected, the discount is not restricted.</td>
</tr>
<tr>
<td><strong>Restrict discount to orders sold during these times</strong></td>
<td>Use the From and To fields to enter a block of time during which the discount is valid. For example, you might offer an admission discount from 10:00 a.m. to 2:00 p.m. If no time of day is selected, the discount is valid for the entire day.</td>
</tr>
<tr>
<td><strong>Restrict discount to these memberships</strong></td>
<td>In the grid, select membership programs and membership levels for which to restrict the discount. For example, a discount may only apply to those patrons who are part of the Friends of the Museum membership program. If no membership or level is selected, the discount is available to all patrons.</td>
</tr>
<tr>
<td><strong>Restrict discount to these constituencies</strong></td>
<td>In the grid, select constituencies for which to restrict the discount. For example, a discount may only apply to board members or volunteer staff. If no constituencies are selected, the discount is available to all patrons.</td>
</tr>
<tr>
<td><strong>Restrict discount by patron address</strong></td>
<td>Under Restrict discount by patron address, in the Include field, select a Constituents by Address smart query selection to restrict the discount to patrons of specific address criteria, such as County or Zip code. Selections are created from queries that use specified criteria to group records together. For example, you can create a selection from a query that will locate all patrons in your system that are from a certain Zip code. To select a Constituent by Address smart query selection, you can use the drop-down list, create a new smart query selection, or edit a previously selected smart query selection. If you leave the field blank, the discount is available to all patrons. Use the drop-down list to select a Constituents by Address smart query selection to restrict the discount to patrons of specific address criteria. To create a new Constituent by Address smart query selection, select Add new smart query from the drop-down list. The New Smart Query screen appears. You must save the query as a dynamic or static selection. If you need to edit the Constituents by Address smart query previously selected, click the pencil to access the Smart Query screen to edit it as necessary. For example, if you need to include patrons from another Zip code, you can add the Zip code to the smart query. For more information about how to create a new smart query, edit a smart query, and create selections, see the &quot;Smart Queries&quot; section of the help file.</td>
</tr>
</tbody>
</table>
Add Quantity Discounts

With quantity discounts, you configure discounts that are applicable when a specific number of tickets or merchandise items are purchased. Quantity discounts can be applied automatically, manually, or by entering a promotion code when purchase requirements are met.

**Note:** For ticket quantity discounts, the non-discounted and discounted tickets involved in the transaction must be from the same program. A patron cannot purchase a specific number of tickets from one program and receive a discount on tickets from different program.

You can configure quantity discounts to give an amount or percentage off of tickets or merchandise items when a specific quantity is purchased. Additionally, you can set a specific price that applies to all tickets or items sold if the designated quantity is purchased. For tickets, the specific price discount is given regardless of price types as long as the quantity requirement is met. If the per-ticket cost of some price types is already lower than the quantity discount, the lower price remains.

The following procedures guide you through the steps required to add a ticket quantity discount and a merchandise quantity discount.

**Add a ticket quantity discount**

1. From the Tickets page, under Discounts and promotions, click Ticket and merchandise discounts. The Discounts page appears.

2. Click Add and select By quantity. The Add a discount by quantity screen appears. For more information about the items on this screen, see Add a Discount by Quantity Screen on page 86.

![Add a discount by quantity screen](image)
3. Enter a name and description to identify the discount. The name and description you enter here will be displayed at the point of sale when processing orders, on receipts and other order documentation, and on reports.

4. In the **Selected for use** field, determine if this discount is applied to the order automatically, manually at the point of sale, or with the entry of a valid promotion code. If your discount is to be added to the order with entry of a promotion code, enter the code and the dates that the code is valid.

5. In the **Applies to** field, select “Tickets.”

6. In the **Calculation type** field, select whether the discount will be calculated as an amount off, a percentage off, or a specific price.

7. In the grid, enter the number of tickets that must be purchased to receive the discount. Additionally, you enter the amount off, percent off, or specific price to be given when the required number of tickets are purchased.

8. To configure restrictions for the discount, select the Availability tab. On this tab, you can restrict the discount to specific sales methods, days, dates, and times. You can also limit the discount to specific memberships, constituencies, and addresses.

![Add a discount by quantity](image)

**Note:** When you add a discount, you configure one set of availability parameters. After the discount is added, you can access the discount record and configure additional sets of availability parameters. These are commonly used for seasonal discounts that become available for a limited time for multiple instances throughout the year.

9. Under **Allow discount on orders sold via these sales methods**, you can control whether this discount is available for all or just some sales methods. By default, all sales methods are
selected except “Group Sales.” If the discount should apply only to specific sales methods, select or clear the applicable checkboxes.

10. Under **Allow discount on orders sold on these days**, you can control the days of the week that this discount is offered. If the discount is prohibited for specific days, clear the applicable checkboxes.

11. Under **Restrict discount to orders sold during these dates**, you can use the **From** and **To** fields to enter a date range during which the discount is valid. For example, you might offer a special summer discount from the months of June to August. If no date range is selected, the discount is not restricted.

12. Under **Restrict discount to orders sold during these times**, you can use the **From** and **To** fields to enter a block of time during which the discount is valid. For example, you might offer an admission discount from 10:00 a.m. to 2:00 p.m. If no time of day is selected, the discount is valid for the entire day.

13. Under **Restrict discount to these memberships**, use the grid to restrict the discount to specific membership programs and levels. For example, a discount may only apply to those patrons who are part of the Friends of the Museum membership program. If you leave the grid blank, the discount is available to all patrons.

14. Under **Restrict discount to these constituencies**, use the grid to restrict the discount to specific constituencies. For example, a discount may only apply to board members or volunteer staff. If you leave the field blank, the discount is available to all patrons.

15. Under **Restrict discount by patron address**, in the **Include** field, select a Constituents by Address smart query selection to restrict the discount to patrons of specific address criteria, such as County or Zip code. Selections are created from queries that use specified criteria to group records together. For example, you can create a selection from a query that will locate all patrons in your system that are from a certain Zip code. To select a Constituent by Address smart query selection, you can use the drop-down list, create a new smart query selection, or edit a previously selected smart query selection. If you leave the field blank, the discount is available to all patrons.

- Select a Constituents by Address smart query selection to restrict the discount to patrons of specific address criteria.
- To create a new Constituent by Address smart query selection, select **Add new smart query** from the drop-down list. The New Smart Query screen appears. You must save the query as a dynamic or static selection.
- If you need to edit the Constituents by Address smart query previously selected, click the pencil to access the Smart Query screen to edit it as necessary. For example, if you need to include patrons from another Zip code, you can add the Zip code to the smart query.

**Note:** For more information about how to create a new smart query, edit a smart query, and create selections, see the *Query and Export Guide.*

**Note:** For more information about how to create a new smart query, edit a smart query, and create selections, see the “Smart Queries” section of the help file.

16. Select the Programs tab to restrict this discount to specific programs. If you do not specify programs in the grid, the discount is not available. After you add a program to the discount, the discount is also added to all associated program events.
17. Click Save. The discount record appears. From the discount record you can make changes to
the discount as needed. For example, you can edit the availability restrictions and adjust the
discounted programs. For more information, see Manage Discounts on page 88.

Add a Discount by Quantity Screen

The table below explains the items on the Add a discount by quantity screen. For more information
about how to access this screen, see Add Quantity Discounts on page 83.

<table>
<thead>
<tr>
<th>Screen Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name and Description</td>
<td>On the General tab, enter the name of the discount and a description to help identify the discount. The name and description you enter will be displayed at the point of sale when processing orders, as well as on receipts and other order documentation, and on reports.</td>
</tr>
<tr>
<td>Selected for use</td>
<td>Determine if discounts are added to the order automatically, manually, or with the entry of a valid promotion code. If your discount is to be added to the order with entry of a promotion code, enter the code and the dates that the code are valid.</td>
</tr>
<tr>
<td></td>
<td>To automatically apply the correct discount during the sales process, select Automatically. The discount is added automatically as the order is placed when the purchase meets the criteria on the Availability tab. Each time additional items are added to the order, the discount will be recalculated.</td>
</tr>
<tr>
<td></td>
<td>If the discount should be manually applied by the Admission Coordinator, select Manually. For example, after the patron orders an admission ticket and presents a AAA membership card, the Admissions Coordinator selects the configured discount.</td>
</tr>
<tr>
<td></td>
<td>If the discount should be applied when the patron presents a valid promotion code accepted by your organization, select With code. For example, after the patron orders an adult admission ticket and provides a coupon from the local newspaper, the Admissions Coordinator enters the code printed on the coupon, and if necessary, the dates the code is valid.</td>
</tr>
<tr>
<td>Calculation type, Group of at least, and Amount off/Percent off/Specific price</td>
<td>Select whether the discount will be calculated as an amount, percentage, or specific price. In the grid, specify the group size, and the value of the discount in the adjacent column. For example, groups of 10 can receive a discount of $5 off or 50% off of the order, or a specific price can be set for a group of that size.</td>
</tr>
</tbody>
</table>
### Screen Item Description

<table>
<thead>
<tr>
<th>Allow discounts on orders solid via these sales methods</th>
<th>On the Availability tab, select a sales method or methods for which the discount can be applied. You can allow this discount for transactions processed through daily sales, advance sales, group sales, and online sales.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Allow discount on these days</td>
<td>Select days of the week on which the discount is valid. For example, you might offer a special discount on Tuesdays.</td>
</tr>
<tr>
<td>Restrict discount to orders sold during these dates</td>
<td>Use the <strong>From</strong> and <strong>To</strong> fields to select a date range during which the discount is valid. For example, you might offer a special summer discount from the months of June to August. If no date range is selected, the discount is not restricted.</td>
</tr>
<tr>
<td>Restrict discount to orders sold during these times</td>
<td>Use the <strong>From</strong> and <strong>To</strong> fields to enter a block of time during which the discount is valid. For example, you might offer an admission discount from 10:00 a.m. to 2:00 p.m. If no time of day is selected, the discount is valid for the entire day.</td>
</tr>
<tr>
<td>Restrict discount to these memberships</td>
<td>In the grid, select membership programs and membership levels for which to restrict the discount. For example, a discount may only apply to those patrons who are part of the Friends of the Museum membership program. If no membership or level is selected, the discount is available to all patrons.</td>
</tr>
<tr>
<td>Restrict discount to these constituencies</td>
<td>In the grid, select constituencies for which to restrict the discount. For example, a discount may only apply to board members or volunteer staff. If no constituencies are selected, the discount is available to all patrons.</td>
</tr>
</tbody>
</table>
### Screen Item Description

<table>
<thead>
<tr>
<th>Screen Item Description</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Restrict discount by patron address</strong></td>
<td>Under <strong>Restrict discount by patron address</strong>, in the <strong>Include</strong> field, select a Constituents by Address smart query selection to restrict the discount to patrons of specific address criteria, such as County or Zip code. Selections are created from queries that use specified criteria to group records together. For example, you can create a selection from a query that will locate all patrons in your system that are from a certain Zip code. To select a Constituent by Address smart query selection, you can use the drop-down list, create a new smart query selection, or edit a previously selected smart query selection. If you leave the field blank, the discount is available to all patrons. Use the drop-down list to select a Constituents by Address smart query selection to restrict the discount to patrons of specific address criteria. To create a new Constituent by Address smart query selection, select <strong>Add new smart query from the drop-down list.</strong> The New Smart Query screen appears. You must save the query as a dynamic or static selection. If you need to edit the Constituents by Address smart query previously selected, click the pencil to access the Smart Query screen to edit it as necessary. For example, if you need to include patrons from another Zip code, you can add the Zip code to the smart query. For more information about how to create a new smart query, edit a smart query, and create selections, see the &quot;Smart Queries&quot; section of the help file.</td>
</tr>
<tr>
<td><strong>Programs tab</strong></td>
<td>The Programs tab appears if you selected “Tickets” in the <strong>Applies to</strong> field on the General tab. On this tab, you restrict the discount to specific programs. If you do not specify programs in the grid, the discount is not available. After you add a program to the discount, the discount is also added to all associated program events. If you do not add any programs to the discount, the quantity discount cannot be used.</td>
</tr>
<tr>
<td><strong>Merchandise tab</strong></td>
<td>The Programs tab appears if you selected “Merchandise” in the <strong>Applies to</strong> field on the General tab. On the Merchandise tab you determine the merchandise that should be discounted. You can apply the discount to all discountable merchandise, or you can limit the discount to specific departments or items. If you select “Specific department” or “Specific merchandise,” also select the departments or merchandise that should be discounted in the grid.</td>
</tr>
</tbody>
</table>

### Manage Discounts

After you create a discount, the discount record is automatically displayed. This allows you to review the record and make sure the discount is configured correctly. Additionally, at any time, you can access, view, and edit discount records. For convenience, you can access and manage both ticket and merchandise discounts from the **Tickets** and **Merchandise** areas respectively.

To access a discount record from **Tickets**, click **Ticket and merchandise discounts** under **Discounts and promotions**. To access a discount record from **Merchandise**, click **Ticket and merchandise discounts**. The Discounts page appears.

From the Discounts page, click the name of a discount to open the discount record.
At the top of each discount record is a summary view that provides at-a-glance information about the discount. It includes the description, discount type, whether the discount is item-level or order-level, and whether the discount is applied automatically, manually, or with a promo code. Additionally, the status of the discount is displayed, along with the calculation type, and the number of times the discount can be applied per item or order.

Below the summary view, each record contains a selection of tabs. The specific tabs that appear depend on the type of discount record you access. For example, a standard item-level discount that applies to both tickets and merchandise will have a Price Type Details tab, Availability tab, Programs tab, Merchandise tab, and an Eligibility tab.

On each tab, you configure and manage details related to the discount. For example, you can adjust the dates and times when a discount is available and change the programs and merchandise items that can be discounted or that trigger a discount. Additionally, you can manage address, membership, and constituency restrictions, edit promotion codes, and configure price type and quantity details.

**Configure Discount Availability**

After you create a discount, you can define additional availability settings to determine when and through which sales methods the discount is applicable. For example, you can configure a discount that is valid during the months May, June, and July for advance sales, daily sales, and group sales. You can then edit the current settings or add new settings to extend or change when the discount is applicable. Additionally, you can access the discount record and delete availability settings if they no longer apply.

**Define additional availability settings**

1. From the Tickets page, under Discounts and promotions, click Ticket and merchandise discounts. The Discounts page appears.
2. Click a discount. The discount record appears.
3. Select the Availability tab.
4. Click Add on the action bar. The Add a new availability screen appears.
5. Under **Allow discount on orders sold via these sales methods**, you can control whether this discount is available for all or just some sales methods. If the discount should apply only to specific sales methods, select or clear the applicable checkboxes.

6. Under **Allow discount on orders sold on these days**, you can control the days of the week that this discount is offered. If the discount is prohibited for specific days, clear the applicable checkboxes.

7. Under **Restrict discount to orders sold during these dates**, you can use the **From** and **To** fields to enter a date range during which the discount is valid. For example, you might offer a special summer discount from the months of June to August. If no date range is selected, the discount is not restricted.

8. Under **Restrict discount to orders sold during these times**, you can use the **From** and **To** fields to enter a block of time during which the discount is valid. For example, you might offer an admission discount from 10:00 a.m. to 2:00 p.m. If no time of day is selected, the discount is valid for the entire day.

9. Click **Save**. You return to the discount record, and the availability parameters you just created appear in the **Availability** frame.

**Add a New Availability Screen**

The table below explains the items on the Add a new availability screen. For information about how to access this screen, see [Configure Discount Availability on page 89](#).
<table>
<thead>
<tr>
<th>Screen Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Allow discounts on orders sold via these sales methods</td>
<td>Select a sales method or methods for which the discount can be applied. Sales methods include daily sales, advance sales, group sales, and online sales.</td>
</tr>
<tr>
<td>Allow discount on these days</td>
<td>Select days of the week on which the discount is valid. For example, you might offer a special discount on Tuesdays.</td>
</tr>
<tr>
<td>Restrict discount to orders sold during these dates</td>
<td>Use the From and To fields to select a date range during which the discount is valid. For example, you might offer a special summer discount from the months of June to August. If no date range is selected, the discount is not restricted.</td>
</tr>
<tr>
<td>Restrict discount to orders sold during these times</td>
<td>Use the From and To fields to enter a block of time during which the discount is valid. For example, you might offer an admission discount from 10:00 a.m. to 2:00 p.m. If no time of day is selected, the discount is valid for the entire day.</td>
</tr>
</tbody>
</table>

**Configure Price Type Details**

When you add a standard item-level discount that applies to tickets within an order, you specify the ticket price types that the discount will apply to and enter the value of the discount for each price type. After you create a discount, you can add, edit, and delete price types and their values as needed.

**Note:** The Price Type Details tab appears only for item-level discounts that can be applied to tickets.

**Add or edit price type details**

1. From the Tickets page, under **Discounts and promotions**, click **Ticket and merchandise discounts**. The Discounts page appears.
2. Click a discount. The discount record appears.
3. Select the Price Type Details tab.
4. Click **Add** or **Edit** on the action bar. The Edit price type details screen appears.
5. In the **Calculation type** field, select whether the discount will be calculated as a specific amount off or percentage off.
6. In the grid, limit the discount only to specific price types, as well as specify the value of the discount for each price type. For example, you can create a discount that provides $2 off of Adult tickets, and $1 off of Child tickets. To make the discount available for all price types, select <any price type>.
7. Click **Save**. You return to the discount record, and the updated information appears in the Price type details grid.

**Configure Quantity Details**

When you add a quantity discount, you specify the number of tickets or merchandise items that must be purchased to receive the discount. Additionally, you enter the amount or percent off that
constitutes the discount, or enter the specific discounted price to be given when the required number of tickets or merchandise items are purchased.

After the quantity discount is saved, the discount record appears and displays the Quantity Details tab. On this tab, you can add new quantity detail or edit the current details. You can change the calculation, edit the ticket or item quantity requirements, and adjust the amount off, percentage off, or specific discounted price. If needed, you can also delete the existing quantity details and create new quantity requirements for the discount.

**Warning:** A quantity discount can have only one set of quantity details that determines the number of tickets or merchandise items that must be purchased to receive the specified discount. This single set of quantity details can have only one calculation type. If you change the calculation type when you add or edit details, the calculation type changes for all existing and new quantity details entered for the discount.

### Add or edit quantity details

1. From the Tickets page, under **Discounts and promotions**, click **Ticket and merchandise discounts**. The Discounts page appears.
2. Click a “By quantity” discount. The discount record appears.
3. Select the Quantity Discounts tab.
4. Click **Add** or **Edit** on the action bar. The Edit quantity type details screen appears.
5. In the **Calculation type** field, select whether the discount will be calculated as a specific dollar amount or percentage. A “By quantity” discount can have only one calculation type. If you change the calculation type when you add or edit details, the calculation type changes for all existing and new quantity details entered for the discount.
6. In the grid, enter the number of tickets or merchandise items that must be purchased to receive the discount. Additionally, you enter the amount off, percent off, or specific price to be given when the required number of tickets or merchandise items are purchased.
7. Click **Save**. You return to the discount record, and the updated information appears in the Price type details grid.

### Edit Purchase Details

When you add a required purchase discount, you configure a number of conditions that must be met in order for the patron to receive the discount. For example, you specify the item and quantity the patron is required to purchase in order to receive a discount, as well as the number of items to which a discount can be applied. These conditions are called “purchase details” and can be edited at any time to change the behavior of the discount. You can configure a required with discount to...

**Note:** The Purchase details tab appears only on “With required purchase” discounts.

### Edit purchase details

1. From the Tickets page, under **Discounts and promotions**, click **Ticket and merchandise discounts**. The Discounts page appears.
2. Click a required purchase discount. The discount record appears.
3. Select the Purchase Details tab and click **Edit** on the action bar. The Edit purchase details screen appears.

![Edit purchase details screen](image)

The Edit purchase details screen contains multiple tabs. In addition to the Purchase Details tab, other tabs appear depending on the purchase detail settings.

- If the discount involves tickets and merchandise, both the Programs and Merchandise tabs appear. On these tabs, you select the programs or merchandise that qualify for or trigger the discount.
- If you configured the discount to involve just tickets, only the Programs tab appears. On this tab, you select the programs that qualify for or trigger the discount.
- If you configured the discount to involve just merchandise, only the Merchandise tab appears. On this tab, you select the merchandise that qualify for or trigger the discount.

4. On the Purchase Details tab, in the **Item type** field under **Purchase these items**, select “Tickets” or “Merchandise.” This is the type of item that must be purchased to receive a discount.

5. In the **Quantity at full price** field, enter the number of tickets or merchandise items the patron must purchase to receive the discount. If you selected “Tickets” in the **Item type** field, in the grid, you can specify price types for the required tickets. For example, the patron must purchase three adult admission tickets in order to receive the discount. If no price type is selected, the discount is available for all price types.

6. Under **Get discount on these items**, in the **Item type** field, select “Tickets” or “Merchandise.” This is the type of item that will be discounted if the required purchase is made.

7. in the **Quantity discounted** field, determine how many times you can receive the discount on your order. You can limit the discount to a specific quantity or make it unlimited. If you select “Specific quantity,” enter the number of items that can be discounted.
8. In the **Calculation type** field, select whether the discount will be calculated as a specific dollar amount or percentage.

9. If you selected “Tickets” in the **Item type** field under **Get discount on these items**, a grid is displayed. Select price types for which the discount can be applied and enter the value of the discount. For example, the patron purchases two adult admission tickets and receives a 50% discount on all child admission tickets purchased. To make the discount available for all price types, select `<any price type>`.

10. If you selected “Merchandise” in the **Item type** field under **Get discount on these items**, a **Value** field is displayed. Enter the value of the discount. Whether you enter an amount or percentage depends on your selection in the **Calculation type** field.

11. Under **Discount restrictions**, in the **Limit discount to** field, you can configure limitations that further define the required purchase discount.
   - If you require tickets to be purchased in order to receive a discount on other tickets, you can limit the discount to the same event as the purchased event or the same program as the purchased event.
   - If you require merchandise to be purchased in order to receive a discount on other merchandise, you can limit the discount to the same item or an item from the same department as the purchased merchandise. You can also select no restriction.

12. To control the number of times the discount can be applied to a single order, select **Limit the number of times this discount may be applied** and enter the number of uses allowed.

13. If this discount involves tickets, select the Programs tab. On this tab, you select the specific programs to discount or the programs that trigger the discount for merchandise. If you do not specify programs in the grid, the discount is not available.

14. If this discount involves merchandise, select the Merchandise tab. On this tab, if applicable, you designate the qualifying purchase items and the items to be discounted when the required items are purchased. The qualifying merchandise can be specific items, specific departments, or any items. The merchandise items to be discounted can be limited to any discountable merchandise, any discountable department, specific items, or specific departments.
15. Click **Save**. You return to the discount record, and the updated information appears on the Purchase Details tab.

### Edit Purchase Details Screen

The table below explains the items on the Edit purchase details screen. For more information about how to access this screen, see Edit Purchase Details on page 92.

<table>
<thead>
<tr>
<th>Screen Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Item type</strong> (Purchase these items)</td>
<td>On the Purchase Details tab, select “Tickets” or “Merchandise.” This is the type of item that must be purchased to receive a discount.</td>
</tr>
<tr>
<td><strong>Quantity at full price and Price type</strong></td>
<td>In the <strong>Quantity at full price field</strong>, enter the number of tickets or merchandise items the patron must purchase to receive the discount. If you selected “Tickets” in the <strong>Item type</strong> field, in the grid, you can specify price types for the required tickets. For example, the patron must purchase three adult admission tickets in order to receive the discount. If no price type is selected, the discount is available for all price types.</td>
</tr>
<tr>
<td><strong>Item type</strong> (Get discount on these items)</td>
<td>Select “Tickets” or “Merchandise.” This is the type of item that will be discounted if the required purchase is made.</td>
</tr>
<tr>
<td>Screen Item</td>
<td>Description</td>
</tr>
<tr>
<td>--------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Quantity discounted</strong></td>
<td>Select if an unlimited number or a specific quantity of tickets or merchandise items can be discounted in an order. If you select a specific quantity, enter the number of tickets or items that can be discounted in an order.</td>
</tr>
<tr>
<td><strong>Calculation type</strong></td>
<td>Select if the discount will be calculated as a specific dollar amount or a percentage off of the ticket or merchandise price.</td>
</tr>
<tr>
<td><strong>Price type and Value (grid)</strong></td>
<td>If you selected “Tickets” in the Item type field under Get discount on these items, a grid is displayed. Select price types for which the discount can be applied and enter the value of the discount. For example, the patron purchases two adult admission tickets and receives a 50% discount on all child admission tickets purchased. To make the discount available for all price types, select &lt;any price type&gt;.</td>
</tr>
<tr>
<td><strong>Value (field)</strong></td>
<td>If you selected “Merchandise” in the Item type field under Get discount on these items, a Value field is displayed. Enter the value of the discount. Whether you enter an amount or percentage depends on your selection in the Calculation type field.</td>
</tr>
<tr>
<td><strong>Limit discount to</strong></td>
<td>Configure limitations that further define the required purchase discount.</td>
</tr>
<tr>
<td></td>
<td>If you require tickets to be purchased in order to receive a discount on other tickets, you can limit the discount to the same event as the purchased event or the same program as the purchased event.</td>
</tr>
<tr>
<td></td>
<td>If you require merchandise to be purchased in order to receive a discount on other merchandise, you can limit the discount to the same item or an item from the same department as the purchased merchandise. You can also select no restriction.</td>
</tr>
<tr>
<td><strong>Limit the number of times this discount may be applied and Uses allowed</strong></td>
<td>If you want to limit the number of times the discount can be applied, select this checkbox. In the Uses allowed field, enter the amount of times the discount can be applied to an order. For example, the patron purchases three tickets to the dinosaur exhibit and can only receive a discount on one more ticket to the same exhibit.</td>
</tr>
<tr>
<td><strong>Programs tab</strong></td>
<td>The Programs tab appears if you selected “Tickets” on the Purchase Details tab. On this tab, you select the specific programs to discount or the programs that trigger the discount for merchandise. If you do not specify programs in the grid, the discount is not available.</td>
</tr>
<tr>
<td><strong>Merchandise tab</strong></td>
<td>The Merchandise tab appears if you selected “Merchandise” on the Purchase Details tab. On this tab, if applicable, you designate the qualifying purchase items and the items to be discounted when the required items are purchased. The qualifying merchandise can be specific items, specific departments, or any items. The merchandise items to be discounted can be limited to any discountable merchandise, any discountable department, specific merchandise, or specific departments.</td>
</tr>
</tbody>
</table>
Manage Promotion Codes

After you configure a discount that is applied with the entry of a valid promotion code, you can add new codes if necessary. For example, a local radio station may supply a verbal code over the air to provide at the box office and also a print ad with a written code. To make both codes acceptable for patrons, you will need to add the second promotion code to the discount record. You can also edit promotion codes as necessary, as well as delete them if they are no longer valid or accepted by your organization.

**Note:** The Promotion Codes tab appears only if the discount is configured to be selected for use with entry of a valid promotion code.

**Add promotion codes**

1. From the Tickets page, under **Discounts and promotions**, click **Ticket and merchandise discounts**. The Discounts page appears.

2. Click a discount. The discount record appears.

3. Select the Promotion Codes tab.

4. Click **Add** on the action bar. The Edit promotion codes screen appears.

5. In the grid, enter the valid promotion code in the **Code** field, and if necessary, use the **Valid From** and **Valid To** fields to enter a block of time during which the code is valid.

**Note:** If no dates are entered in the **Valid To** and **Valid From** fields, the promotion code is always valid.

To edit promotion codes that have already been configured, click inside the grid and make changes as necessary.

6. Click **Save**. You return to the discount record, and the codes you entered appear in the **Promotion codes** grid.

Manage Programs Included on Discounts

When you create a standard, by quantity, or required purchase discount to reduce the price of tickets, you specify the programs to include. This allows you to control which programs are discounted. Additionally, if you create a required purchase discount where a patron must purchase tickets to receive other tickets or merchandise at a reduced price, you specify the programs that trigger the discount.

After you create a discount that includes tickets, you can edit the programs included on the discount or change the programs that trigger the discount. To change the programs included on a discount, you add or remove programs from the Programs tab of a discount record.

After you add programs to a discount, the discount is also added to all associated program events. If you no longer want to allow a discount for a specific program, you can remove the program from the discount record. For example, if you configure a discount that is available during the month of May, when June arrives, you can remove the discount from the program record since it is no longer valid. After you remove a program from the discount record, the discount is also removed from all
associated program events. If you do not add programs to a ticket discount or you remove all programs, the discount cannot be used.

**Note:** The Programs tab does not appear for discounts that apply to an entire order or to item-level discounts that involve only merchandise.

**Add programs to discounts**
1. From the Tickets page, under **Discounts and promotions**, click **Ticket and merchandise discounts**. The Discounts page appears.
2. Click a discount. The discount record appears.
3. Select the Programs tab.
4. Click **Add** on the action bar. The Program Search screen appears.
5. Use the search screen to locate the program to add to the discount. For more information about how to search for a program, see **Search for Programs on page 158**.
6. In the **Results** grid, select the program to add to the discount and click **Select**. You return to the discount record and the program is displayed on the Programs tab. After you add programs to a discount, the discount is also added to all associated program events.

**Remove programs from discounts**
1. From the Tickets page, under **Discounts and promotions**, click **Ticket and merchandise discounts**. The Discounts page appears.
2. Click a discount. The discount record appears.
3. Select the Programs tab.
4. Click **Delete** on the action bar. A confirmation message appears.
5. Click **Yes**. You return to the discount record and the program is no longer displayed on the Programs tab. If you remove all programs from a ticket discount, the discount cannot be used.

**Edit Merchandise Included on Standard and Quantity Discounts**

When you configure standard and quantity discounts, you can specify the merchandise to be discounted. You can include all merchandise, limit the merchandise by department, or select specific merchandise to discount. After you save a standard or quantity discount that includes merchandise, you can access the Merchandise tab on the discount record to edit the merchandise included.

**Note:** The Merchandise tab does not appear for discounts that apply to an entire order. Discounts that apply to an entire order are automatically added to the order when they meet the availability criteria that are set on the Availability tab.

**Edit merchandise included on standard and quantity discounts**
1. From the Tickets page, under **Discounts and promotions**, click **Ticket and merchandise discounts**. The Discounts page appears.
2. Click a standard or quantity discount that includes merchandise. The discount record appears.
3. Select the Merchandise tab.

4. Click **Edit** on the action bar. The Edit merchandise discount application screen appears.

5. In the Applies to field, select an option to change the merchandise that is discounted. You can discount all merchandise eligible for discounts, or you can limit the discount to specific departments or items. If you select “Specific departments” or “Specific merchandise,” also select the specific departments or merchandise that should be discounted in the grid.

6. In the **Value** field, you can edit the amount or percentage to be discounted per item.

7. Click **Save**. you return to the Merchandise tab and the changes are displayed.

**Edit merchandise that triggers a required purchase discount**

1. From the Tickets page, under **Discounts and promotions**, click **Ticket and merchandise discounts**. The Discounts page appears.

2. Click a standard or quantity discount that includes merchandise. The discount record appears.

3. Select the Purchased Merchandise tab.

4. Click **Edit** on the action bar. The Edit merchandise purchased to trigger discount screen appears.

5. In the Applies to field, select an option to change the merchandise that must be purchased in order to receive a discount. You can select “Any merchandise,” or you can select specific merchandise or departments that trigger the discount. If you select “Specific departments” or “Specific merchandise,” also select the departments or merchandise that should trigger the discount.

6. Click **Save**. you return to the Purchased Merchandise tab and the changes are displayed.

**Edit Merchandise Included on Required Purchase Discounts**

When you configure required purchase discounts, you can include merchandise to be discounted, as well as merchandise that triggers the discount. For example, you can set up a required purchase discount that gives a patron 50% off a merchandise item when they buy two merchandise items at full price.

After a required purchase discount is created, you can access tabs on the discount record and edit the merchandise included. You access the Purchased Merchandise tab to change the merchandise that triggers a discount and you access the Discounted Merchandise tab to change the merchandise that receives the discount.

**Note:** The Purchased Merchandise tab and the Discounted Merchandise tab appear only on required purchase discounts that include merchandise to be discounted and merchandise that triggers the discount.

**Configure Counties**

From **Administration**, you can define the counties in which your patrons live. The counties in which your patrons live can determine certain requirements such as eligibility for discounts, for example you can create a discount that is restricted to patrons who live in Charleston County.
After you add a county, you can edit or remove it as necessary, such as if your organization no longer offers a discount to patrons who live in that county. If a county is no longer in use, but you do not want to delete it, you can make it inactive. Inactive counties cannot be used when you configure discounts.

**Add a county**

1. From Administration, click Code tables under Data. The Code Tables page appears.
2. Under Biographical, select the County code table name. The County Table Entries page appears.
3. On the action bar, click Add. The New table entry screen appears.
4. Enter the name of the county you would like to add.
5. Click Save. You return to the County Table Entries page.

**Configure Patron Address Restrictions**

After you create a discount, you can edit patron address restrictions, such as to restrict the discount to patrons who live in a specific county or Zip code. When you add patron address restrictions to a discount, that discount is only available to patrons of the specified address.

If a patron address restriction should no longer be applied to a specific discount, you can edit it to include a different restriction, or remove the restriction entirely. If you remove all patron address restrictions from a discount, the discount is then available to all patrons.

**Edit patron address restrictions**

1. From the Tickets page, under Discounts and promotions, click Ticket and merchandise discounts. The Discounts page appears.
2. Click a discount. The discount record appears.
3. Select the Eligibility tab.
4. In the Patron address grid, click Edit on the action bar. The Edit patron address restriction screen appears.
5. In the Include field, select a smart query selection with the necessary patron address restrictions, such as County or Zip code.
   - Use the drop-down list to select a Constituents by Address smart query selection to restrict the discount to patrons of specific address criteria.
   - To create a new Constituent by Address smart query selection, select Add new smart query from the drop-down list. The New Smart Query screen appears. You must save the query as a dynamic or static selection.
   - If you need to edit the Constituents by Address smart query previously selected, click the pencil to access the Smart Query screen to edit it as necessary. For example, if you need to include patrons from another Zip code, you can add the Zip code to the smart query.
6. Click Save. You return to the discount record.
Configure Membership Restrictions

After you create a discount, you can add additional membership restrictions. When you add membership restrictions to a discount, that discount is only available to patrons of the specified memberships.

If a membership restriction should no longer be applied to a specific discount, you can access the discount record and remove the membership. If you remove all membership restrictions from a discount, the discount is then available to all patrons.

Configure Constituency Restrictions

After you create a discount, you can add additional constituency restrictions. When you add constituency restrictions to a discount, that discount is only available to patrons of the specified constituencies.

If a constituency restriction should no longer be applied to a specific discount, you can access the discount record and remove the constituency. If you remove all constituency restrictions from a discount, the discount is then available to all patrons.

Combinations

To increase incentive for patrons to purchase admission to events, you can create and sell combinations or “combos.” Combinations are two or more events, selected from specified program groups, that are sold together as a single item. For example, admission to the museum plus a tour of a nearby historic site may be purchased together as a combination order.

There is no limit to the number of program groups that can be included in each combination. When patrons purchase a combination, they select one event from each program group included in the combination. Each combination can have its own pricing and they are often offered at a lower price than if you purchase admission to each event separately.

Add Combinations

Combinations can include any programs your organization sells, and there is no limit to how many programs can be included in a combination. You can add new combinations at any time. When you create a new combination, it is immediately active in the program, unless you manually mark it as inactive.

When you add a combination to your database, you enter a name and description. You also determine whether the programs in your combination must occur on the same day as each other in order to be purchased. Additionally, you determine what price types are available for the combination, such as adult rates, child rates, and senior rates.

After you add a combination, you access the combination record to define additional characteristics. These characteristics include assigning program groups that are included in the combination and setting availability criteria to determine if the combination is valid at the time it is purchased. You can also set membership and constituency restrictions.
Add a combination

1. From Tickets, under Discounts and promotions, click Combinations. The Combinations page appears.

2. On the action bar, click Add. The Add a combination screen appears. For more information about the items on this screen, see Add a Combination Screen on page 102.

3. Enter a name and description that identify the combination, such as to explain the programs that will be included in the combination. The name you enter here will be displayed at the point of sale when processing orders, on receipts and other order documentation, and on reports. This description is for internal use only and does not appear on an online combination. You can enter a description for an online combination on the Web Forms tab. For more information, see Add web forms for combinations on page 111.

4. By default, you cannot add members only events to a combination. To override this rule, select Allow member restricted events to be sold through this combination. With this option, you can choose members only programs on the combination's Programs tab, but all restrictions set on programs are ignored when you sell the combination. In other words, members only events can be sold to all patrons as part of a combination.

Note: When a combination includes member only events, it cannot be sold online. Once a combination is enabled for sale online, the Allow member restricted events to be sold through this combination option is disabled. To sell a restricted program as part of a combination online, you must remove all the membership restrictions from the program and its scheduled events.

5. Select the Selected events must occur on same day checkbox if the events that can be included in the combination must occur on the same day as each other. If you do not select this checkbox, you can create combinations to be sold that include events that take place on any day.

6. In the Price types allowed grid, select price types that will be included in the combination. For example, common price types include “Adult,” “Child,” and “Senior.” If the price type you need does not appear in the list, you can enter a new one. A confirmation message appears when you add a new price type.

7. Click Save. You are sent to the combination record. From the combination record you can manage program groups that determine the programs included for sale in the combination and set availability parameters, as well as set membership and constituency restrictions.

Add a Combination Screen

The table below explains the items on the Add a combination screen. For more information about how to access this screen, see Add Combinations on page 101.
<table>
<thead>
<tr>
<th>Field Name</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name and Description</td>
<td>Enter a name and description that identify the combination, such as to explain the programs that will be included in the combination. The name you enter here will be displayed at the point of sale when processing orders, on receipts and other order documentation, and on reports. This description is for internal use only and does not appear on an online combination.</td>
</tr>
<tr>
<td>Selected events must occur on same day</td>
<td>Select the checkbox to restrict the combination to only include programs that occur on the same day as each other. If you do not select this checkbox, you can create combinations to be sold that include programs that take place on any day.</td>
</tr>
<tr>
<td>Price types allowed</td>
<td>In the grid, use the drop-down list to select price types that will be included in the combination. For example, common price types include &quot;Adult,&quot; &quot;Child,&quot; and &quot;Senior.&quot; If the price type you need does not appear in the list, you can enter a new one. A confirmation message appears when you add a new price type.</td>
</tr>
</tbody>
</table>

### Manage Combinations

After you create a combination, from the combination record you can manage program groups that determine the programs included for sale in the combination and set availability parameters, as well as set membership and constituency restrictions. Each individual combination record displays the combination's description and whether it is active or inactive at the top of the screen.

**Note:** You can also access the combination record from the Combinations page. From the Combinations page, click a combination.

From the Combinations page, you can edit the combination name and description, as well as mark the combination as inactive. You can also delete combinations from the Combinations page.

### Configure Program Groups

After you create a combination, you must access the combination record and add program groups. Program groups determine the programs that are included for purchase in the combination you create, as well as prices for the combination. Multiple program groups should be added to each combination your organization offers. Patrons select one event from each program group in the combination. For example, in a combination you can include a program group for all IMAX movies and set prices for adults, seniors, and children, as well as include a program group for all walking tours and set the prices. Patrons would then select an IMAX movie and walking tour event and purchase them together as a single item.

You can add programs to program groups by using a selection or by adding them manually. Selections are created from queries that use specified criteria to group records together. For example, you can create a selection from a query that will locate all programs in your system that contain the word
“IMAX” in their name. With this selection, you create a program group of all IMAX movies for your combination. For more information about queries and selections, see the *Query and Export Guide*.

**Note:** You can use selections that are dynamic or static. Dynamic selections are automatically refreshed each time they are used. Whenever a dynamic selection runs, the program searches the database for any new records that meet the criteria of the selection and adds them to the results. For example, you could use a dynamic selection to automatically update the programs in your combination's program groups when new programs are added to the database. Static selections are like a snapshot of your database at the time it is first run. Only the records included when the selection is first run are included whenever the selection is used in the program. For more information about dynamic and static selections, see the *Query and Export Guide*.

You can edit program groups as needed, and access the combination record to delete them if necessary. For example, you can add or remove individual programs from a program group, or remove an entire program group if it should no longer be part of a combination. The prices of the events in each program group add up to determine the total cost of the combination for each price type and appear in the summary grid at the top of the screen. If you edit the prices in any program group, the total price of the combination for each price type recalculates.

**Add a program group**

1. From *Tickets*, under **Discounts and promotions**, click **Combinations**. The Combinations page appears.
2. Click the combination name. The combination record appears.
3. Select the Programs tab.
4. Click **Add** on the action bar. The Add a program group screen appears. For more information about the items on this screen, see *Add a Program Group Screen on page 105*. 
5. Enter a name and description to identify the program group, such as the type of programs included in the group. The name and description entered displays on the combination record. The description is for internal use only and does not appear on an online combination. You can enter a program description for an online combination on the Web Forms tab. For more information, see Add web forms for combinations on page 111.

6. Select programs to be included in the program group.
   - To use a selection to add programs to the program group, select Get programs from selection. The Selection field becomes active. Click the magnifying glass to access the Selection Search to locate a previously created selection of programs to be included in the program group. After you choose a selection, the programs appear in the Programs grid.
   - To individually select programs to add to the program group, in the Programs grid, click the magnifying glass to access the Program Search to locate programs.

   **Note:** If the combination was enabled for online sales, you can select only one program for the program group.

7. In the Prices grid, enter the face price for each price type. The face price is the base price of a ticket before any fees are applied.

8. Click Save. You return to the combination record.

### Add a Program Group Screen

The table below explains the items on the Add a program group screen. For more information about how to access this screen, see Configure Program Groups on page 103.
**Screen Item** | **Description**
---|---
Name and Description | Enter a name and description to identify the program group, such as to explain the type of programs that will be included in the group. The name and description you enter here will be displayed on the combination record.
Get programs from selection and Selection | Select the checkbox to use a selection to add programs to the program group. The Selection field becomes active. In the grid, click the magnifying glass to access the Selection Search to locate a selection of programs to be included in the program group. After you choose a selection, the programs appear in the Programs grid.
Programs | Use the grid to manually select programs to be included in the program group. Click the magnifying glass to access the Program Search to locate programs. **NOTE:** If the combination was enabled for online sales, you can select only one program for the program group.
Prices | In the grid, enter the price of purchase for each price type in the Face price column.

**Configure Combination Availability**

When combinations are created, *Altru* sets default availability parameters that determine if the combination is valid at the time it is purchased. You can edit the combination's default availability parameters. For example, you can update the availability so the combination is only available for purchase on every Thursday during the month of July. You can also make the combination available for online sales.

If you do not edit the default availability parameters, the combination is available for purchase at all times and through daily and advance sales, as long as it is not marked as inactive.

Combinations are available for online sales when:

- Selected events occur on the same day.
- The program group includes only one program.
- Membership or constituency restrictions are NOT defined on the Membership and Constituency tabs.

Combinations are unavailable for online sales on a selected date when:

- The combination includes a program group in which all events meet any of these criteria:
  - Event does not exist on the selected date.
  - Event is sold out on the selected date.
  - Today is outside the on-sale period for the event.
  - The current date/time is blocked for all delivery methods (i.e., within the 1 hour window before an event that does not allow eTickets).
- The selected date is beyond the on-sale period set in **Online settings for tickets** defined on the Manage Program Forms page in Web.
**Note:** When a patron attempts to purchase a combination that is unavailable, they receive an error message and are then prompted to choose another date on the calendar.

Combinations are unavailable for online sales on ALL dates when:

- The combination is inactive.
- All programs within a program group are marked Inactive.
- **Online Sales** is not selected on the combination's Availability tab.
- **Online Sales** is not enabled as a sales method for all programs within a program group.
- Today is outside the on-sale period for the combination.

**Note:** When a patron attempts to purchase a combination that is unavailable for all dates, they receive an error message. They must choose a different combination.

**Add availability parameters**

1. From Tickets, under **Discounts and promotions**, click **Combinations**. The Combinations page appears.
2. Click a combination. The combination record appears.
3. Select the Availability tab.
4. Click **Add** on the action bar. The Add a new availability screen appears.

![Add a new availability screen](image)
5. Under **Allow combination on orders sold via these sales methods**, select which sales methods can use the combination: **Advance sales**, **Daily sales**, or **Online sales**. If you select **Online sales**, the combination displays "Approved for websites" after you save the availability.

**Note:** You cannot enable online sales for a combination if membership or constituency restrictions are defined on the Memberships and Constituencies tabs, events are allowed to occur on different days, or program groups contain multiple programs.

6. Under **Allow combination on orders sold on these days**, you can control the days of the week that the combination is offered. If the combination is prohibited for specific days, clear the applicable checkboxes.

7. Under **Restrict combination to orders sold during these dates**, you can use the **From** and **To** fields to enter a date range during which the combination is valid. For example, you might offer a special summer combination from the months of June to August. If no date range is selected, the combination is not restricted.

8. Under **Restrict combination to orders sold during these times**, you can use the **From** and **To** fields to enter a block of time during which the combination is valid. For example, you might offer a combination that is available from 10:00 a.m. to 2:00 p.m. If no time of day is selected, the combination is valid for the entire day.

9. Click **Save**. You return to the combination record, and the availability parameters you just created appear in the **Availability** frame.

### Add Availability Screen

The table below explains the items on the Add a new availability screen. For more information about how to access this screen, see **Configure Combination Availability on page 106**.

<table>
<thead>
<tr>
<th>Screen Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Allow combination on orders sold via these sales methods</strong></td>
<td>Select a sales method or methods for which the combination can be purchased. For example, the combination may only be valid if the patron purchases tickets over the phone. Sales methods include daily sales, advance sales, and group sales.</td>
</tr>
<tr>
<td><strong>Allow combination on orders sold on these days</strong></td>
<td>Select days of the week on which the combination is valid. For example, you might offer a special combination on Tuesdays.</td>
</tr>
<tr>
<td><strong>Restrict combination to orders sold during these dates</strong></td>
<td>Use the <strong>From</strong> and <strong>To</strong> fields to select a date range during which the combination is valid. For example, you might offer a special summer combination from the months of June to August. If no date range is selected, the combination is not restricted.</td>
</tr>
<tr>
<td><strong>Restrict combination to orders sold during these times</strong></td>
<td>Use the <strong>From</strong> and <strong>To</strong> fields to enter a block of time during which the combination is valid. For example, you might offer a combination from 10:00 a.m. to 2:00 p.m. If no time of day is selected, the combination is valid for the entire day.</td>
</tr>
</tbody>
</table>
Configure Membership Restrictions

After you create a combination, you can add membership restrictions. When you add membership restrictions to a combination, that combination is only available to patrons with the specified memberships.

If a membership restriction should no longer be applied to a specific combination, you can access the combination record and remove the membership. If you remove all membership restrictions from a combination, the combination is then available to all patrons.

► Add membership restrictions
1. From Tickets, under Discounts and promotions, click Combinations. The Combinations page appears.
2. Click a combination. The combination record appears.
3. Select the Memberships tab.
4. Click Add on the action bar. The Edit membership screen appears.

Note: You cannot add membership restrictions if the combination is available for online sales.

5. In the grid, select membership programs and membership levels for which to restrict the combination. For example, a combination may only apply to those patrons who are part of the Friends of the Museum membership program. Under Level, if you select <any level>, all membership levels will be valid for the discount.
6. Click Save. You return to the combination record.

Configure Constituency Restrictions

After you create a combination, you can add constituency restrictions. When you add constituency restrictions to a combination, that combination is only available to patrons of the specified constituencies.

If a constituency restriction should no longer be applied to a specific combination, you can access the combination record and remove the constituency. If you remove all constituency restrictions from a combination, the combination is then available to all patrons.

► Add constituency restrictions
1. From Tickets, under Discounts and promotions, click Combinations. The Combinations page appears.
2. Click a combination. The combination record appears.
3. Select the Constituencies tab.
4. Click Add on the action bar. The Edit constituency screen appears.

Note: You cannot add constituency restrictions if the combination is available for online sales.
5. In the grid, select constituencies for which to restrict the combination. For example, a combination may only apply to board members or volunteer staff.

6. Click **Save**. You return to the combination record.

## Configure Combination Web Forms

On the Web forms tab of a combination record, you can configure web forms for online sales of combinations. With this web form, patrons can select the combinations to buy, add them to the cart, enter payment information, check out, and then print tickets.

The form will look similar to this example.

Combinations are available for online sales when:
• Selected events occur on the same day.
• The program group includes only one program.
• Membership or constituency restrictions are NOT defined on the Membership and Constituency tabs.

**Note:** For more information about when online combinations are NOT available, see [Configure Combination Availability on page 106](#).

**Notes:**

• When combinations include programs that use eTickets, patrons receive individual tickets for each program.
• Online combinations do not display sold out events.
• The web form displays the program group name and its web description. For scheduled programs, it also displays the event name and web description. By default, the event web description inherits the web description from the program. To use a different one, you can enter a custom description on the Web Forms tab of the event.
• Combination web forms respect the Online settings for tickets defined on the Manage Program Forms page in Web. On the Language tab, there is also a category for combinations so you can define messages specific to combination items.

![Design and Language Tab](image)

**Add web forms for combinations**

1. From Tickets, under Discounts and promotions, click Combinations. The Combinations page appears.
2. Click the name of a combination. The combination record opens.

   **Note:** To enable the web form, you must select the Online sales option on the Add/Edit availability screen. After enabled, the combination displays "Approved for websites."

3. Select the Web Forms tab.
4. The program automatically generates a web form for the combination and displays its URL under Web form URL. Click this link to preview the web form on your site.
5. Under Acknowledgement email, you can view whether the default or custom acknowledgement email will be sent after purchase. To design a custom email, click Edit. Use
the HTML editor to design the email. For more information, refer to Design an acknowledgement email message.

6. Under **Combination description for web forms**, enter a description of the combination. For example, you can enter which programs are included in the combination and the amount saved by purchasing them as a group.

7. Under **Program group descriptions and event conflicts**, you can edit the web form’s descriptions for program groups and allow event conflicts. (By default, event conflicts are not allowed and the form displays the description defined on the Web Forms tab of the program record.) To edit a description, expand the program and click **Edit**. On the Program group description and event conflicts screen, edit the description in the text editor.

   To allow event conflicts, select **Allow events in this program group to conflict with other events in this combination.** Users will be allowed to add them to their cart.

   **Note:** When event conflicts are not allowed, the patron receives a warning on the web form if they attempt to purchase conflicting events. Also, they cannot add the conflicting event to the cart.

8. Click **Save**. You return to the combination record.
Workstations and Printing

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By configuring "workstations" in Altru, you can create a complete point of sale (POS) system that consolidates your ticketing, merchandise, and membership sales within a single interface. You can connect workstations to POS peripherals such as cash drawers, credit card readers, receipt and ticket printers, and barcode scanners. Once everything is configured, you can complete an entire sales workflow from one workstation. For example, you can create a sales order, process the payment, print receipts and tickets, and scan barcodes for admission, all from the Daily Sales page.

Print Setup

To configure the system to print sales documents such as tickets, receipts, and will call headers, use the Print Setup page to guide you through the necessary steps. The Print Setup page provides an interactive list of the tasks necessary to successfully complete initial configuration. To access the Print Setup page, from Tickets, click Print setup.

The tasks on the Print Setup page are presented in a specific order because some build on others. Each task is linked to the corresponding area of the program where you complete the selected task. For example, when you select Workstations from the Print Setup page, you are sent to the Workstations page so you can add and manage the workstations your organization will use to print sales documents. For information about how to manage workstations, see Configure Workstations on page 120

Next to each task on the Print Setup page a red “X” appears to indicate that configuration is incomplete. After each task is fully complete, a green checkmark appears. When you first access the Print Setup, some tasks will already have a green checkmark due to default data provided in the system. You should review all default data to determine how it should be edited or what needs to be added.

If a task has a dependency upon the completion of another task, it will be inactive until all other tasks on which it depends are complete. For example, Printer Lists will be inactive until you have configured at least one workstation, and associated at least one printer to that workstation. Provided under each task is a brief description, as well as a count of how many active individual records have been configured in each feature area. For example, if you have configured five active workstations, “5 workstations available” appears under Workstations on the Print Setup page.

After you complete a task, you can navigate back to the Print Setup page by clicking the direct link provided in each feature area. This allows you to easily continue to the next task. To return to Print Setup from a feature area, under Setup on the explorer bar, click Print setup.
For more information about each item on the Print Setup page, see Print Configuration Checklist on page 115.

Print Configuration Checklist

The following checklist is a workflow for initial printing configuration. Because each printing configuration task builds on the next, we recommend that you complete each task in the order provided.

**Note:** Although many of the printing configuration tasks you access from Tickets may only need to be completed once, there are other tasks you may configure initially but return to on a regular basis to adjust as needed. For example, you may need to create new “workstations” to account for the addition of a new ticket window or another sales location.

- Set up the workstation interface on each workstation to allow users to print and open their cash drawer. For more information, see Install the Workstation Interface on page 116.
- Identify and add workstations. In terms of this application, a “workstation” is added to the system to identify a computer that requires a cash drawer or will print tickets and other sales documents like receipts and will call headers. You must add a workstation to the system for each computer within your organization that will print tickets and sales documents. For more information, see Configure Workstations on page 120.
- Add printers to workstations. After you add workstations, you must add printers to each workstation. The printers must be installed locally or available on your network before you can add them to workstations. For more information, see Add Printers to Workstations on page 123.
- Prioritize workstation printers. You prioritize the printers added to each workstation so that the most convenient and compatible printer is used to print tickets and sales documents. For more information, see Prioritize Workstation Printers on page 124.
- Configure printer lists. You group printers with similar capabilities together in lists so they can be associated with specific sales document templates. For example, you add all ticket printers to one printer list and all receipt printers to a different list. When you configure a ticket sales document template, you assign the “ticket” printer list to the ticket template. When you configure a receipt sales document template, you assign the “receipt” printer list to the receipt template. For more information, see Configure Printer Lists on page 127.
- Configure ticket and sales document templates. By default, the system includes preconfigured ticket and sales document templates that your organization can use to print documents. To become familiar with the layout and information included in each default template, see Understand Default Sales Document Files on page 129. The default templates do not have printer lists assigned as these will be unique to your organization. If your organization plans to use the default templates, you must edit the templates you intend to use and assign a printer list to each. If needed, you can add more document templates using the preconfigured reports provided. For more information, see Configure Ticket and Sales Document Templates on page 128.
- Configure printing rules for tickets and sales document templates. You configure printing rules for each ticket and sales document template your organization uses. The printing rules you configure determine whether tickets and other sales documents print based on the sales method and delivery methods selected during the sales process. You can also choose to print itemized receipts...
for group sales payments. For more information, see Configure Printing Rules for Advance, Daily, and Online Sales on page 148.

**Note:** Because refunds are not associated with specific sales methods or delivery methods, you do not configure printing rules for refund receipt templates.

- Configure sales document print priority. Prioritizing sales documents is necessary to facilitate printing to different printer types. You configure the print priority for sales document templates within each respective sales document type group on the Sales Document Templates page. For more information, see Configure Sales Document Print Priority on page 149.

**Note:** You do not configure print priority for ticket templates on the Sales Document Templates page. Instead, ticket templates are prioritized when they are assigned to programs. For more information, see Assign Ticket Templates to Programs on page 169.

- Assign ticket templates to programs. After you create a ticket template, you must assign the template to programs that should use the template to print tickets. After ticket templates are assigned to programs, the appropriate tickets will print when the programs are purchased by patrons. For more information, see Assign Ticket Templates to Programs on page 169. This checklist item is necessary only for ticket templates.

- Verify that the print settings on each delivery method are configured properly. On each delivery method, you configure a setting that determines whether sales documents print immediately upon order completion or if printing is deferred until a later time. You should review this setting on each delivery method and verify that it is set correctly. For more information, see “Delivery Methods” on page 39.

- Verify that your organization information has been entered correctly. One of the initial system configuration tasks that should be completed is entering your organization name and contact information, which can include your address, phone number, and website. After this information is entered, it is displayed in sales documents generated by the system. For example, when a receipt prints after a ticket sale, the organization information is printed on the receipt. If you do not enter the specific name and contact information for your organization, the generic information that is provided with the system will be printed. For more information, see Organization Information on page 15.

- Verify that the Interleaved 3 of 9 (also called code 39) barcode font is installed on your workstation and server machines. This font must be installed on your workstations and servers in order to successfully print barcodes on tickets and membership cards. Click the link on the Print Setup page to install the font.

### Install the Workstation Interface

The workstation interface is a browser extension or add-on that enables you to open the cash drawer and print tickets and other sales documents from Altru. Use the installation utility on the Print Setup page to install the interface on each computer you will use as a workstation. View detailed system requirements for workstations.
Install the workstation interface in Internet Explorer 11

**Note:** Before you begin, you need to configure browser settings in Internet Explorer.

1. From Tickets, under Initial setup, select Print setup. The Print Setup page appears.
2. Under Workstation interface, click the link in "Use the setup wizard to install the workstation interface for Internet Explorer".
   
The Internet Explorer Information bar appears with this message: "This website wants to install the following add-on: 'Blackbaud.AppFx.Programming.WebshellWorkstation...' from Blackbaud, Inc."
3. Click Install on the information bar. If this machine needs the ActiveX add-on installed, you'll receive this message.

4. Click OK. The Print Setup page refreshes automatically. (If you already have the ActiveX installed, this message doesn't appear and the page refreshes automatically.)
5. Click the link in "Use the setup wizard to install the workstation interface" for Internet Explorer again.
6. The Internet Explorer Information bar appears again. Click Install. A Windows prompt appears asking if you want to allow this app to make changes to your device. Click Yes.
   
The Blackbaud Altru Workstation Interface Setup Wizard opens.
7. Complete the steps in the wizard to install the interface. When the installation is finished, the completion screen appears. Click **Close** to close the wizard.

8. Refresh the Print Setup page and make sure there is a green checkmark next to the **Workstation Interface** task. After the workstation interface is installed, you are ready to complete the next workstation setup tasks.

**Install the workstation interface in Chrome**

*Note:* Only Chrome for Windows is supported at this time.

1. From **Tickets**, under **Initial setup**, select **Print setup**. The Print Setup page appears.

2. Under **Workstation interface**, click the link in "1. **Install the browser extension** for Chrome". The Chrome Web Store opens to the Print for Blackbaud Altru extension.
3. Click **ADD TO CHROME**. A prompt appears asking if you want to add "Print for Blackbaud Altru"? Click **Add extension**. The extension is installed and you return to the Print Setup page.

**Note:** Chrome browser extensions are stored in the Windows user profile on a machine. If Altru users share a machine and use the same Windows credentials to log in to that machine, you can install the browser extension once for that shared Windows profile. However, if Altru users share a machine but have their own Windows profiles/logins, the browser extension needs to be installed for each user’s Windows profile.

4. Under **Workstation interface**, click the link in "2. Use the setup wizard to install the workstation interface for Chrome."


3. Click the utility to start the installation. The Blackbaud Altru Workstation Chrome Interface Setup Wizard opens.
4. Complete the steps in the wizard to install the interface. (Note: You may receive a Windows prompt asking if you want to allow this app to make changes to your device. Click Yes.) When the installation is finished, the completion screen appears.

5. Click Close.

6. Refresh the Print Setup page and make sure there is a green checkmark next to the Workstation Interface task. After the workstation interface is installed, you are ready to complete the next workstation setup tasks.

Configure Workstations

In Altru, a “workstation” is a machine configured to print sales documents (such as tickets and receipts) or to work as a cash drawer. To enable a computer to work as workstation, you must install the workstation interface and then create a workstation record that uses the computer’s machine name to identify it as a workstation in the system. From the workstation record, you can specify which printers the workstation can access and the payment methods that cause the cash drawer to open.

Add Workstations

You must add a workstation to the system for each computer within your organization that requires a cash drawer or will print tickets and sales documents. For example, if you have a ticket window with three computers and all three computers will print tickets and sales documents, you must add a workstation for each computer.

Note: If you plan to sell tickets from a computer, but will not use a cash drawer or print tickets and other sales documents, you do not need to add a “workstation” for that computer.
When you add a workstation to the system, you must enter the specific machine name of the computer on which you are adding the workstation. The machine name identifies the workstation on your network.

**Tip:** Before you add workstations, we recommend that you make a list of the machine names of each computer at your organization that will print tickets and sales documents. For more information about locating a computer’s machine name, see Manage Workstation Machine Names on page 122.

After you add a workstation, you configure the printers and cash drawer it will use.

> **Add a workstation**

1. From Tickets, under **Printing**, click **Workstations**. The Workstations page appears.
2. Click **Add**. The Add a workstation screen appears.
3. Enter a name and description to identify the workstation. The name and description you enter here will appear on the workstation record and any associated searches.
4. Enter the workstation’s machine name (NOT the full name). The machine name is the actual name of the computer as recognized by your network. For more information about finding the machine name, see Manage Workstation Machine Names on page 122.
5. Click **Save**. The new workstation record appears and details about the workstation are displayed at the top of the screen. These details include the workstation name and description, as well as the machine name and status.
   - If you entered the correct machine name and it is recognized on your network, a status of “Machine name confirmed” appears. You can now add printers to the workstation. For more information, see Configure Workstation Printers on page 123.
   - If you entered the machine name incorrectly or the machine has not yet been configured on your network, a machine status of “Unable to access machine” appears. To correct the machine name, under **Tasks**, click **Change machine name**. For more information about how to change the machine name, see Manage Workstation Machine Names on page 122.

**Edit Workstations**

After you add a workstation, you can edit the name and description of the workstation as needed. You can edit a workstation from the Workstations page or from each specific Workstation record.

**Note:** The **Machine name** field is not accessible on the Edit workstation screen. To edit the machine name, access the workstation record and click **Change machine name**. For more information about how to change the machine name, see Manage Workstation Machine Names on page 122.

**Delete Workstations**

If workstations are no longer in use, you can delete them. For example, if you close a ticket window and will no longer use the computers at that window to print tickets and sales documents, you can delete the related workstation records. You can delete a workstation from the Workstations page or from each specific Workstation record.
A workstation cannot be deleted if it was used to print tickets. Instead, you can mark the workstation as inactive. If you need to use the workstation again, you can mark it active.

Manage Workstation Machine Names

When you add a workstation to the system, you must enter the specific machine name of the computer on which you are adding the workstation. The machine name identifies the workstation on your network. Before you add workstations, we recommend that you make a list of the machine names of each computer at your organization that will print tickets and sales documents.

If needed, after you create a workstation, you can change the name of the machine associated with the workstation. For example, this may be necessary if you entered the name of the machine incorrectly or if the computer associated with the workstation is given a new machine name.

Note: After you change the machine name, the machine status displayed on the workstation record lets you know whether the machine is recognized and accessible. For example, if you enter the machine name incorrectly, it will not be recognized and you will see a status of “Unable to access machine.” If you enter the correct machine name and it is recognized, the machine status changes to “Machine name confirmed.”

Locate a workstation’s machine name

These steps may be a little different on your machine depending on which version of Windows you are using.

1. Click Start on the task bar. The Start menu appears.
2. Click Computer, then System properties.
3. Under Computer name, domain and workgroup settings, you’ll find the computer’s name you will need when you configure your workstation. We suggest you write down the name, or save it in an easily accessible location to refer to when you configure your workstation.

Warning: For better performance, use the Computer name NOT the Full computer name.
Configure Workstation Printers

Generally, each workstation you set up has access to specific printers locally or on your network that are used to print tickets and other documents. In order to use printers at workstations, you must manually add and prioritize the printers that should be used at each. You can add only those printers that are available to each workstation via your network. If a machine does not have access to a printer, it cannot be assigned to the workstation configured on that machine. In most cases, the printers you add to a workstation are those that are most conveniently located.

After you add printers to a workstation, you can prioritize them for use when printing tickets and sales documents. For example, you may have two ticket printers assigned to a workstation. One of the ticket printers is right next to the workstation and the other is located at the customer service desk. When you set the priority for the printers assigned to the workstation, you would make sure the printer right next to the workstation is the highest priority.

Add Printers to Workstations

**Warning:** To add printers to a workstation, you must be a network administrator or be logged into the machine with your Windows credentials. Otherwise you will receive an error message.
After you add a workstation, you must specify which printers the workstation will use. To add printers to a workstation, they must be accessible to the workstation's machine — printers can be installed locally or on a network.

For better printing performance, each printer you add to a workstation needs a unique name. When you install a printer on your machine, it typically installs with a default name such as Epson TM-T88V. If you have more than one of the same type of printer, they will all have the same default name. Before you add these printers to workstations in Altru, you need to give them unique names.

**Rename printers on workstation machines**

You will need to complete these steps on each machine you plan to use as a workstation.

1. Click Start on the task bar. The Start menu appears.
2. Click Devices and Printers.
3. Right-click the printer to update and select Printer properties.
4. Click Change Properties.
5. Enter a unique name for the printer on this workstation. For example, the new name might identify the workstation it is attached to, such as "Receipt Printer Workstation 1" or "Receipt Printer Workstation 2."
6. Click OK.

**Add printers to a workstation**

1. From Tickets, under Printing, click Workstations. The Workstations page appears.
2. In the grid, click a workstation. The workstation record appears.
3. Click Add. The Add a printer screen appears.
4. Select a printer from the list of available printers.
5. Click Save. You return to the workstation record. Repeat this process until you add all necessary printers to the workstation. After you add printers, you use the up and down arrows on the action bar to prioritize the printers. For more information, see Prioritize Workstation Printers on page 124.

**Note:** Before you can use printers that you add to workstations, you must add each printer to a printer list. This is true when you initially add printers to workstations, as well as any printers you add at a later date. For more information, see Configure Printer Lists on page 127.

**Prioritize Workstation Printers**

After you add printers to a workstation, you can use the up and down arrows on the action bar to prioritize the printers for preferred use. You should prioritize the printers that have been added to your workstation so the printer located most conveniently to your workstation is used first.

Use the Priority column in the Printers grid to view the currently set priority of printers. For example, when you print tickets, the system will attempt to print using the ticket printer with the highest
priority. If that printer is unavailable, the print job is sent to the ticket printer with the next highest priority until the tickets are successfully printed.

> **Prioritize workstation printers**

1. From *Tickets*, under **Printing**, click **Workstations**. The Workstations page appears.
2. In the grid, click a workstation. The workstation record appears.
3. In the **Printers** grid, select a printer, and click the up or down arrows on the action bar to move the printer higher or lower in priority. The printer with the priority of 1 is the highest priority printer. The grid automatically refreshes and saves the new priority.

**Remove Printers from Workstations**

After you add printers to workstations, you can remove them if necessary. For example, if one of your printers breaks or is no longer in use, you can remove it from the workstation records to which it is attached.

> **Remove printers from a workstation**

1. From *Tickets*, under **Printing**, click **Workstations**. The Workstations page appears.
2. In the grid, click a workstation. The workstation record appears.
3. In the grid, select a printer and click **Delete**. A confirmation message appears.
4. Click **Yes**. You return to the workstation record.

**Configure Workstation Cash Drawers**

A compatible cash drawer that is installed and configured correctly can open automatically based on the payment method selected during a transaction. For example, the cash drawer can be configured to open when the “Cash” payment method is selected during a sale or refund.

**Note:** The cash drawers that are compatible with this system are those that are connected to a computer through a receipt printer. Before you can configure cash drawers within this application, you must connect the cash drawer to the machine through the receipt printer. For more information about installing your cash drawer, see the hardware documentation supplied by the manufacturer.

Once the cash drawer is connected the receipt printer, you must access the corresponding workstation record within the system to identify the printer and enter the printer command needed to open the cash drawer. This command is specific to each receipt printer model and must be provided by the manufacturer of your cash drawer. To find the correct command to enter, you must refer to the hardware documentation provided with your cash drawer or contact the manufacturer.

**Note:** Only magnetic card swipes using keyboard emulation are supported for use at your workstations. Other HID compliant card swipes that do not use keyboard emulation are not supported.
Configure a cash drawer for a workstation

1. From Tickets, under Printing, click Workstations. The Workstations page appears. If workstations have not yet been added, you must add one before you can proceed with configuring a cash drawer. For more information, see Add Workstations on page 120.
2. In the grid, click a workstation. The workstation record appears.
3. Select the Cash drawer tab.
4. In the Cash drawer receipt printer section, click Edit. The Edit cash drawer receipt printer screen appears.
5. On the Edit cash drawer receipt printer screen, in the Receipt printer field, select the receipt printer that you are using to connect the cash drawer to the machine. If you have multiple receipt printers connected to the workstation, make sure your select the receipt printer that the cash drawer is connected to.
6. In the Printer command in format 00,00,00,00,00 field, enter the printer command that will open the cash drawer. This command is specific to each receipt printer model and must be provided by the manufacturer of your cash drawer. To find the correct command to enter, you must refer to the hardware documentation provided with your cash drawer or contact the manufacturer.
7. Click Save. You return to the Cash drawer tab. The receipt printer you selected and the print command you entered are displayed.
8. In the Cash drawer payment methods section, click Add. The Add a payment method screen appears. On this screen you select the payment methods that should trigger the cash drawer to open.
9. In the Payment method field, select a method t and click Save. You return to the Cash drawer tab and the payment method you selected is displayed.
10. Add each payment method that should trigger the cash drawer to open. Typically, organizations want the drawer to open for purchases made with cash or check. However, if your cash drawer has a slot that allows you to slip checks into the drawer without opening it, you may only want to configure the drawer to open for cash transactions.

Note: In the Cash drawer payment methods section, you can remove a payment method so it will no longer trigger the cash drawer to open when selected during a sale or refund transaction. To do so, select a select a payment method in the grid and click Delete.
11. Your cash drawer is now configured. We recommend you run through several test transactions to verify it opens as expected.

Edit Cash Drawer Receipt Printer

The cash drawers that are compatible with this system are those that are connected to a computer through a receipt printer. Before you can configure cash drawers within this application, you must connect the cash drawer to the machine through the receipt printer. Once the cash drawer is connected the receipt printer, you must access the corresponding workstation record within the system to identify the receipt printer and enter the printer command that will be needed to open the
cash drawer. To do so, access a workstation record and select the Cash drawer tab. In the **Cash drawer receipt printer** section, click **Edit**.

On the Edit cash drawer receipt printer screen, in the **Receipt printer** field, select the receipt printer that you are using to connect the cash drawer to the machine. If you have multiple receipt printers connected to the workstation, make sure your select the receipt printer that the cash drawer is connected to.

In the **Printer command in format 00,00,00,00,00** field, enter the printer command that will open the cash drawer. This command is specific to each receipt printer model and must be provided by the manufacturer of your cash drawer. To find the correct command to enter, you must refer to the hardware documentation provided with your cash drawer or contact the manufacturer.

For more information about configuring cash drawers for a workstation, see Configure Workstation Cash Drawers on page 125.

**Delete Cash Drawer Payment Methods**

When you configure a cash drawer for a workstation, you add each payment method that should trigger the cash drawer to open during a sale or refund transaction. If needed, you can remove a payment method so it will no longer trigger the cash drawer to open. To do so, access a workstation record and select the Cash drawer tab. In the **Cash drawer payment methods** section, select a payment method to remove and click **Delete**.

For more information about configuring cash drawers for a workstation, see Configure Workstation Cash Drawers on page 125.

**Configure Printer Lists**

Printer lists are used to group printers with similar capabilities and are used to ensure that your tickets and other sales documents print on compatible printers. You must add a printer list for each type of printer you use. For example, if you have specialized ticket printers, you should add a “Ticket Printers” list that includes all of your ticket printers. If you use thermal receipt printers, you should add a “Receipt Printers” list that includes all receipt printers. When you add a ticket or receipt sales document template, you will assign the corresponding printer list to each.

When you add a printer list, the pool of printers you can select from are only those printers that have been added to workstations. If you have not yet added printers to workstations, there are no printers available. For information about how to add printers to workstations, see Configure Workstation Printers on page 123.

**Note:** After you add printer lists, you assign them to sales document templates to ensure that your tickets and other sales documents print on compatible printers. For more information about sales document templates, see Configure Ticket and Sales Document Templates on page 128.

**Add a printer list**

1. From Tickets, under **Printing**, click **Printer lists**. The Printer Lists page appears.
Configure Ticket and Sales Document Templates

To print tickets and other sales documents like receipts, will call headers, and mailing headers, you must configure sales document templates. When you add a template, you select the type of document you want to print. The document types available include Ticket, Itemized Receipt, Credit Card Receipt, Mailing Header, Will Call Header, Refund Itemized Receipt, and Refund Credit Card Receipt.

Next, you select the file to associate with the document template that determines the layout of the printed document and the information it will include. For ticket, itemized receipt, and credit card receipt templates, the program provides a Scalable Vector Graphics (.svg) file. The ticket .svg file can be customized. For all other document types, the program provides a set of preconfigured report files you can use to configure your sales document templates. For more information, see Understand Default Sales Document Files on page 129.

When you configure ticket and sales document templates, you also select a printer list to associate with the template. This list determines the printers that are capable of printing the document. For example, if you add a sales document template and select Ticket as the type, you should assign a printer list to the template that includes only ticket printers. For more information about printer lists, see Configure Printer Lists on page 127.

In addition to assigning a printer list to a template, you also configure printing rules for each template you use. The printing rules you configure determine whether tickets and other sales documents print based on the sales method and delivery methods selected during the sales process. Whether printing is deferred is based on the configuration of each delivery method. For more information, see Configure Printing Rules for Advance, Daily, and Online Sales on page 148. If your organization processes group sales and accepts credit cards as a form of payment, you should also configure group sales printing rules. For more information, see Configure Printing Rules Group Sales on page 1
Note: Ticket templates differ from the other sales document templates in that you can assign ticket templates to the specific programs you configure and sell. This allows you to print different tickets on an individual program basis. Ticket templates are also prioritized when they are assigned to programs. For more information, see Assign Ticket Templates to Programs on page 169.

Understand Default Sales Document Files

Each sales document you print is based on a file which determines the layout and information included in the document. Ticket, itemized receipt, and credit card receipt templates use Scalable Vector Graphics (.svg) files. All other types of document templates use report files. Each type of file is described in detail below. A sample view of each document is also provided.

Ticket SVG File

The default ticket Scalable Vector Graphics (.svg) file provides a basic ticket layout that your organization can use to print tickets for all programs. The document is designed to print on standard 5.5x2” ticket stock with a 1.5” right-side stub. The layout includes details such as the program event name, date, and time, as well as the price, price type, and sales method used to purchase the ticket. A barcode is displayed on the right-side stub.

You can download the default ticket template to customize its layout and appearance. To learn more, refer to Customize Ticket Document Templates on page 142.

Note: The ticket barcode number and the order ID number are not the same. The Ticket barcode is specific to each ticket and the order ID is specific to the entire order.

Note: After you configure ticket templates and define printing rules, you also must assign ticket templates to programs. When patrons purchase tickets to programs, the system uses the ticket template assigned to the program to determine the layout and design of the ticket, as well as the printer to use. Ticket templates are also prioritized when they are assigned to programs. For more information, see Assign Ticket Templates to Programs on page 169.

File name: DefaultTicketTemplate.svg
Itemized Receipt .SVG File

The default itemized receipt Scalable Vector Graphics (.svg) file provides a printed record of all items purchased during a transaction. It includes special event registrations, as well as donations. Additionally, the itemized receipt displays all discounts and fees applied during the transaction. For efficiency, the itemized receipt always prints after credit card receipts. This allows the patron to sign the merchant copy of the credit card receipt while the itemized receipt prints.

When you configure printing rules, you determine when itemized receipts print based on the sales method and delivery methods selected during the sales process. Typically, you configure itemized receipts to print for purchases made through all sales methods and delivery methods. Itemized receipts print one per order. You can also choose to print itemized receipts for group sales payments by setting group sales printing rules.

Itemized receipts always use the default .svg file
Sample: The "Data view" sample of the default itemized receipt illustrates the layout of the data fields and information included in the default template.
Sample: The “Print view” of the default itemized receipt illustrates how the transaction data is captured and printed for the patron to provide a record of purchases made.

Credit Card Receipt SVG File

The default credit card receipt Scalable Vector Graphics (.svg) file provides a basic customer credit card receipt and a merchant copy. These receipts can be used by most organizations that accept credit card payments. The merchant copy differs from the customer copy in that it provides a signature line. The merchant copy always prints first so the patron can sign it while the customer copy prints. The signed merchant copy should be retained by the ticket seller.

By default, credit card receipt templates are configured to print when credit card payments are made. Additionally, for each template, you configure printing rules that determine when credit receipts print based on the sales method and delivery methods selected during the sales process. One merchant copy and one customer copy will print per each credit card payment. Additionally, you can choose to print credit card receipts for group sales payments by setting group sales printing rules.
Credit card receipts always use the default .svg file

Dimensions: 2.25” (unlimited length)

Merchant copy sample:
Customer copy sample:

Refund Itemized Receipt Report

The default refund itemized receipt report provides a printed record of all items returned during a refund transaction. It includes any applicable discounts, fees, and taxes that were applied during the original transaction. The refund itemized receipt report provides both a customer copy and a merchant copy that automatically print when a refund is processed. The merchant copy differs from the customer copy in that it provides a signature line. The merchant copy always prints first so the patron can sign it while the customer copy prints. The signed merchant copy should be retained by the ticket seller.

By default, refund itemized receipt templates are configured to print when a refund is processed. Because refunds are not associated with specific sales methods or delivery methods, you do not configure printing rules for refund receipt templates.

Report name: Default Refund Itemized Receipt Report
### Merchant copy sample:

#### Organization name

<table>
<thead>
<tr>
<th>Address line 1</th>
<th>Address line 2</th>
<th>Address line 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Phone number</td>
<td>Website</td>
<td>Order number</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Refund date, time</td>
</tr>
</tbody>
</table>

#### Refund Receipt

**Event 1 name, date, time**

- Qty (Price type) @ Price = total

**Tax**

- Tax 1 name = total
- Tax 2 name = total

**Total Refund** $XXX.XX

**Refund Payment** $XXX.XX

**Customer signature**

**Thank You!**

**Merchant copy**

---

#### Blackbaud Museum

1000 Daniel Island Dr.
Charleston, SC 29492
843-216-6200
www.blackbaudmuseum.com
111999
April 1 2011 11:52AM

### Refund Receipt

**Space Lecture 08/13/11 7:00PM**

- 2 Adult @ 2.00 $4.00
- 2 Child @ 2.00 $4.00

**Tax**

- State Sales Tax $1.23
- City Tax $1.25

**Total Refund** $9.50

**Refund Cash** $9.50

**Customer signature**

**Thank You!**

**Merchant copy**
The default refund credit card receipt report provides a basic customer credit card refund receipt and a merchant copy. These receipts print when a refund is processed for an order that contains a credit card payment. The amount that will be credited back to the card is clearly displayed. The merchant copy differs from the customer copy in that it provides a signature line. The merchant copy always prints first so the patron can sign it while the customer copy prints. The signed merchant copy should be retained by the ticket seller.

By default, refund credit card receipt templates are configured to print when a refund is processed that involves a credit card payment. Because refunds are not associated with specific sales methods or delivery methods, you do not configure printing rules for refund receipt templates.

Report name: Default Refund Credit Card Receipt Report
Dimensions: 2.25” (unlimited length)

Merchant copy sample:

Customer copy sample:
Will Call Header Report

The default will call header report provides a header card that can be printed along with tickets for a will call order. The document is designed to be printed on standard 5.5x2” ticket stock and contains the first name and last name of the recipient, as well as the order number and sales method. The will call header also contains a signature line that the recipient signs to acknowledge receipt of the tickets when they are picked up.

When you configure printing rules, you determine when the will call header prints based on the sales method and delivery methods selected during the sales process. Typically, you configure a will call header to print only when the “will call” delivery method is selected during a transaction. Will call headers print one per order.

Report name: Default Will Call Header Report

Dimensions: 5.5x2”

Sample:

Mailing Header Report

The default mailing header report is designed to be printed on standard 5.5x2” ticket stock and placed in a window envelope so the recipient name and address are clearly visible. When you configure printing rules, you determine when the mailing header prints based on the sales method and delivery methods selected during the sales process. Typically, you configure a mailing header to print only when a mail-based delivery method is selected.

Note: The mailing header report is designed according to United States Postal Service recommendations for window envelopes. The printable area on the 5.5x2” ticket stock is limited to the area that will be displayed through a standard window envelope.
Add Ticket and Sales Document Templates

While the system provides default templates for tickets and sales documents, you can also add others to fit your organization's needs. For example, a typical organization will need to configure at least one ticket template, an itemized receipt template, and a credit card receipt template. If needed, you can also add templates for a will call header and a mailing header.

When you configure printing, you add sales document templates to the system and associate them with document files. For more information, see Understand Default Sales Document Files on page 129. You also assign a list of compatible printers to each template. For more information about printer lists, see Configure Printer Lists on page 127.

When printing, sales document templates use the document files to determine the information to be displayed on the printed document and the layout of that information on the document, as well as use printer lists to locate the most compatible printer on your workstation.

**Note:** Default sales document templates that are already loaded into the system do not have printer lists assigned to them. If you use a default sales document template, you must edit the template to assign a printer list. For more information about how to edit templates, see Edit Ticket and Sales Document Templates on page 141.

**Add a ticket or sales document template**

1. From Tickets, under **Printing**, click **Sales Documents**. The Sales Document Templates page appears.
2. Click **Add**. The Add template screen appears.
3. Enter a name and description to identify the template. The information you enter here will appear on the Sales Document Template page and throughout the system to identify the template.

4. In the **Type** field, select the type of sales document you want to create. The document types available include Ticket, Itemized Receipt, Credit Card Receipt, Mailing Header, and Will Call Header.

   - For all document types other than Ticket, Itemized Receipt, or Credit card Receipt, in the **Report** field, select the report to attach to the template. The report you associate with a template should correspond with the selected document type as it determines the layout of the printed document and the information it will include. For example, if you select Refund Itemized Receipt as the type, you should select a refund receipt report file. For information about the default sales document reports included in the system, see [Understand Default Sales Document Files on page 129](#).

   - If you select Ticket as the **Type**, click the green arrow button to upload the custom .svg template file from your local machine. For more information how to add custom ticket templates, refer to [Customize Ticket Document Templates on page 142](#).

   - If you select Itemized Receipt or Credit Card Receipt as the **Type**, you cannot select a file. The default .svg file is always used.

5. In the **Printer list** field, select a printer list to assign to the template. The list you select should include printers that are capable of printing the document. For example, if you add ticket template, you should assign a printer list to the template that includes only ticket printers. For information about how to create a printer list, see [Configure Printer Lists on page 127](#).

   **Note:** A printer list is a list of compatible printers. When a document is printed, the printer list assigned to the document template is compared to the workstation's available printers. If the first priority printer is not available, the document prints on the next available printer of the highest priority.

![Add a template](image)

6. Click **Save**. The sales document template record appears. Now that you have added a template, you configure printing rules to determine whether the documents print based on the sales method and delivery methods selected during the sales process. For more information, see [Configure Printing Rules for Advance, Daily, and Online Sales on page 148](#).
addition to configuring printing rules, if you added a ticket template, you must assign it to programs. For more information, see Assign Ticket Templates to Programs on page 169.

Edit Ticket and Sales Document Templates

You can edit the name and description for a ticket or sales document template. You can also select a different printer list to associate with the template. Since the template types have different behaviors, you cannot edit the Type field after it has been configured.

**Warning:** While the Report field is editable, we recommend that you do not change the report file associated with a template once it is in use because it will create issues with sales document printing.

For ticket templates, you can use the Edit template screen to download the default template provided in the program to edit it in a vector graphics software program. For more information, refer to Customize Ticket Document Templates on page 142.

**Tip:** Default ticket and sales document templates provided in the system do not have printer lists assigned as these are unique to your organization. During implementation, you must edit the default templates to assign printer lists. For more information about printer lists, see Configure Printer Lists on page 127.

**Edit a sales document template**

1. From Tickets, under Printing, click Sales Documents. The Sales Document Templates page appears.
2. In the grid, expand the sales document template and click Edit. The Edit template screen appears.

**Note:** The Type field is not active since you cannot change the template type after it has been configured.

3. You can edit the name and description of the template and the printer list assigned to the template.
4. If the template type is Ticket, in the File field, you can click the name of the template to download its .svg file to edit in a vector graphics software tool. To upload the updated template file, click the green arrow button and browse to the .svg file on your local machine. For more information about how to customize ticket templates, refer to Customize Ticket Document Templates on page 142.
5. Click **Save**. You return to the Sales Document Templates page.

**Customize Ticket Document Templates**

The program provides a default ticket template that you can download to customize in a vector graphics software program. For example, you can edit the layout of the default template and remove details you do not need. You can also use the provided merge fields to design a new ticket template.

After you create a new template, you can assign it to specific programs. When you print a ticket from your workstation, the system uses the ticket template assigned to the program record to determine the layout and design of the ticket.

**Note:** Custom ticket templates only apply to tickets printed from a workstation. For information on customizing the eTickets page, see [Design eTickets Page](#).

To design a custom ticket template, you must know:

- Scalable Vector Graphics (SVG)1.1 standards
- How to use a vector graphics software program
- Your printer's resolution (width and height in pixels)

**Tip:** To avoid formatting issues, we recommend that you use *Inkscape* vector graphics software.

**Edit the Default Ticket Template**

You can download and edit the default template provided in the program to change the layout of merge fields or remove fields you do not need.

1. From the Sales Document Templates page in *Tickets*, expand the Default Ticket Template row and click **Edit**.
2. On the Edit template screen, click **DefaultTicketTemplate.svg** to download the default template file.

3. Open the downloaded DefaultTicketTemplate.svg file in your vector graphics software program.

**Tip:** Save an unedited copy of DefaultTicketTemplate.svg to your local machine as a backup in case you need the original version.
4. Using the editor, you can move or remove merge fields, change the font and font size, add images, etc. Save your changes.

5. Return to the Edit template screen. Click the green arrow button to upload the updated .svg file and then save the template.

Create a New Ticket Template

1. From the Sales Document Templates page in Tickets, click Ticket merge fields under Setup. The Ticket Merge Fields screen appears.
2. Use your cursor to select the list of merge fields and right-click to copy. For a definition of each merge field, see Ticket Merge Fields on page 147.

3. In your vector graphics software program, create a new template in landscape format. Use these dimensions based on the resolution of your printer:
   - 200 DPI printers - 1100px width and 400px height
   - 300 DPI printers - 1650px width and 600px height

4. Paste the merge field names into the template and use the editor to design the layout and appearance of the ticket. Save the template to your local machine.

5. Return to the Sales Document Templates page and click Add. The Add template screen appears.

6. In the Type field, select "Ticket" and click the green arrow button to upload the custom template. Save the template.

7. The new sales document record opens automatically. Add printing rules that specify how to print tickets for each sales method and delivery method selected during the sales process.
8. After you define the printing rules, you must assign the ticket template to the programs that will use it. From a program record, select the Tickets tab and click **Add** to select the template.

**Tips for Using Inkscape**

- Save all ticket documents as "Plain SVG (*.svg)".
- Always use Landscape format or tickets will appear rotated and stretched.
- When printing tickets, if a black rectangle appears instead of text, open the template, select the merge field and select **Text, Convert to Text**.
When creating a textbox, do not click and drag before typing.

**Ticket Merge Fields**

This table describes the data displayed on the ticket for each type of merge field.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>%ORGANIZATION</td>
<td>Organization name</td>
</tr>
<tr>
<td>%PROGRAMNAME</td>
<td>Program name (This field is not included in the default template since it often has the same value as the event name. You may want to include it when the program name is different than the event name.)</td>
</tr>
<tr>
<td>%EVENTNAME</td>
<td>Event name</td>
</tr>
<tr>
<td>%LOCATION</td>
<td>Event location</td>
</tr>
<tr>
<td>%EVENTSTARTDATE_SHORT</td>
<td>Short date format (04/01/2015)</td>
</tr>
<tr>
<td>%EVENTSTARTDATE_LONG</td>
<td>Long date format (Wednesday, April 01, 2015)</td>
</tr>
<tr>
<td>%EVENTSTARTDATE_TIME</td>
<td>Event start time (3:00 PM)</td>
</tr>
<tr>
<td>%TICKETNUMBER</td>
<td>Ticket number</td>
</tr>
<tr>
<td>%BARCODE</td>
<td>Barcode (If you plan to use a scanner, always include this field and format it using a barcode font.)</td>
</tr>
<tr>
<td>%PRICETYPE</td>
<td>Type of ticket price</td>
</tr>
<tr>
<td>%PRICE</td>
<td>Ticket price</td>
</tr>
<tr>
<td>%SALESMETHODTYPE</td>
<td>Sales method</td>
</tr>
</tbody>
</table>
Configure Printing Rules for Orders with No Balance

For itemized receipt templates, you can configure printing rules for orders with no balance due. By default, itemized receipts do not print when you process payments with a zero balance. You can enable or disable printing zero balance receipts for each respective template.

**Note:** When printing is disabled, no receipt will print when a ticket seller clicks **Print receipt** on the Daily Sales or Advance Sales page for an order with a zero balance due. If a patron requests a printed receipt, you manually print the ticket from the Sales Documents tab of the sales order record.

**Note:** When the default printing method for Daily Sales or Advance Sales is set to email, a receipt is always emailed even when the template does not allow printing receipts for zero balances.

> **Configure printing rules for orders with no balance**

1. From **Tickets**, under **Printing**, click **Sales Documents**. The Sales Document Templates page appears.
2. In the grid, click an itemized receipt template. The template page appears.
3. To allow this template to print orders with no balance due, next to **Printing rules for orders with no balance**, click **Enable**. To disallow this template to print during group sales transaction, click **Disable**.

Configure Printing Rules for Advance, Daily, and Online Sales

You configure printing rules for each ticket and sales document template your organization uses. The printing rules you configure determine whether tickets and other sales documents print based on the sales method and delivery methods selected during the sales process.

**Note:** On each delivery method, you configure a setting that determines whether sales documents print immediately upon order completion or if printing is deferred until a later time. When configuring printing rules for your sales document templates, you should review this setting on each delivery method and verify that it is set correctly. For more information, see [Delivery Methods on page 23](#).

In most cases, your organization will configure printing rules on each sales document template for every delivery method you use. For example, with a ticket template, you can add a printing rule that states this document will print when a ticket purchase is made through “Advance Sales” and “Mail” is selected as the delivery method. Whether printing is deferred or happens immediately is determined by the settings on each delivery method.

On each template, you can add only one printing rule per delivery method. For example, on each sales document template, you will have one printing rule for “Mail,” “Will Call,” “In Person,” and any other delivery method you use.

**Note:** Because refunds are not associated with specific sales methods or delivery methods, you do not configure printing rules for refund receipt templates.
You do not configure printing rules for advance, daily, and online sales from the Itemized Receipt sales document template because these configured on the Delivery methods tab for Daily Sales or Advance Sales.

**Add printing rules**

1. From Tickets, under **Printing**, click **Sales Documents**. The Sales Document Templates page appears.
2. In the grid, click a sales document template. The template page appears.
3. In the **Printing rules for advance, daily, and online sales** grid, click **Add**. The Add a printing rule screen appears.
4. Select the delivery method for this rule. For example, select “Mail” to add a rule that determines when this document will print on orders where “Mail” is selected as the delivery method. On each template, you can add only one printing rule per delivery method.
5. In the **Sales method** grid, all sales methods are marked by default. Clear the checkboxes next to each sale method that should not be included in this rule. For example, if this document should print only when “Mail” is selected as the delivery method and either “Advance Sales” or “Online Sales” is the selected sales method, clear all checkboxes except for “Advance Sales” and “Online Sales.”
6. Click **Save**. You return to the sales document template page and the new rule is displayed in the grid. Repeat this process to configure rules for each delivery method supported by this sales document. In addition to configuring printing rules, if you added a ticket template, you must assign it to specific programs. For more information, see Assign Ticket Templates to Programs on page 169.

**Configure Sales Document Print Priority**

All sales document template types can be prioritized. Ticket templates are prioritized when they are assigned to programs. For more information, see Assign Ticket Templates to Programs on page 169. All other sales document templates, including receipts and will call headers, are prioritized within their sales document type groups on the Sales Document Templates page.

Prioritizing sales documents is necessary to facilitate printing to different printer types. For example, you may need multiple itemized receipt sales document templates, one that prints on receipt printers and one that prints on plain paper printers. This would be needed if you have receipt printers at all workstations except for one and at the lone workstation you have a plain paper printer.

To print receipts successfully to both locations, you need to add and configure two itemized receipt sales document templates and prioritize them. One receipt template should be assigned a printer list that includes the receipt printers, while the other template should be assigned a printer list that includes the plain paper printer. For more information about printer lists, see Configure Printer Lists on page 127.

After both itemized receipt sales documents are added, you set the print priority. To set the priority, you select one of the templates within a sales document type group and click the arrows on the action bar. Because most itemized receipts will be printed on the receipt printers, you move that template to the “1” priority spot.
Configure sales document print priority

1. From Tickets, under Printing, click Sales Documents. The Sales Document Templates page appears.
2. In the grid, select a template within a sales document type group. The group must contain more than one template to change priority.

Note: From the Sales Document Templates page you can change the print priority of credit card receipt templates, itemized receipt templates, will call header templates, and other non-ticket templates. Ticket templates are prioritized when they are assigned to programs. For more information, see Assign Ticket Templates to Programs on page 169.

3. On the action bar, use the arrows to change the print priority. Move a template up to increase priority or down to decrease priority. The highest priority within a sales document type group is “1”.

Note: When a sales document is queued to print during a sales transaction, the highest priority template is queued first. If a compatible printer is not found, the next priority sales document within the group is queued to print.

4. As needed, repeat these steps to change the print priority of other sales document templates.

Remove Ticket and Sales Document Templates

If a sales document template is no longer valid or in use, you can access the Sales Document Templates page and remove it. You can remove sales document templates as necessary, unless it is a ticket template that is associated with a program, or another type template that is associated with a delivery method or sales method. To remove a template, on the Sales Document Templates page, select the template to remove and click Delete on the action bar.

To remove sales document ticket templates that are associated with programs, you must first access the program record and remove the template from the program. To remove a sales document template that is associated with a delivery method or sales method, you must first access the delivery method record or sales method record and remove the template from the record.

If a sales document template is no longer in use, but you do not want to remove it, you can mark it inactive. To mark a sales document template as inactive, from the Sales Document Templates page, select the template to mark as inactive, on the action bar click Mark Inactive. To mark the template as active again, select the template, and on the action bar click Mark Active.

Assign Ticket Templates to Programs

After you configure ticket templates, you must assign them to programs. When patrons purchase tickets to programs, the system uses the ticket template assigned to the program record to determine the layout and design of the ticket, as well as the printer the ticket will be printed on. You can assign ticket templates to a program at any time. Ticket templates are also prioritized when they are assigned to programs.
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Add a Scheduled Program Screen .............................................................................................. 154
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Add Program Taxes .................................................................................................................... 172
Every ticket your organization sells starts with a program. For example, a program can be defined as an exhibit, show, or daily admission. You can build and sell programs based on scheduled events or daily admissions. With “scheduled programs,” you add the program and then schedule specific program events. When a patron buys tickets to a scheduled program, they select an event that occurs at a defined time.

**Tip:** You can also setup scheduled programs that require registration. This variation of a scheduled program is helpful if you offer workshops or other types of programs that have limited space and would benefit from an attendee roster. These “pre-registered programs” also enable you to record registrant information, for example, you can configure questions to track food allergies or preferred shirt sizes for each registrant.

With “daily admission programs,” there are no specific events. Instead, a patron simply buys tickets to the program. Daily admission programs are commonly used for tickets that are sold all day at any time, for example, a museum or aquarium admission.

## Add Scheduled Programs

You configure scheduled programs to sell tickets for timed events. For example, if your organization has a “Sea Turtles” exhibit that occurs three times a day on Mondays and Wednesdays, you would set up a “Sea Turtles” scheduled program and schedule events according to the days and times of each occurrence.

Additionally, you can set up scheduled programs that require registration, which is helpful if you offer workshops or other types of programs that have limited space and would benefit from an attendee roster. These “pre-registered programs” also enable you to record registrant information. For example, you can configure questions to track meal preferences or preferred shirt sizes for each registrant.

**Note:** To save time, you can copy a program that already exists instead of starting with an entirely new program. A copied program retains the on-sale settings and prices, as well as assigned discounts, fees, and taxes from the program being copied. Additionally, if copying a pre-registered program, all existing registration questions, notices, and sections are retained. When you copy a scheduled program, any events currently scheduled are not are not copied over to the new program. For more information, see [Copy Programs on page 175](#).
When you add a new scheduled program to your database, you typically enter a name and description, as well as select a location where the program takes place. Additionally, you can enter default information that is inherited by events scheduled for the program. These defaults include program capacity, membership restrictions, and ticket prices. For example, you can load a previously created price list for the program or assign valid price types and associated ticket prices without loading a price list. These prices are then loaded automatically for each program event your schedule. You can also make registration required for the program and any events scheduled for the program.

After you add a scheduled program, you can assign fees, taxes, and discounts, as well as assign ticket templates to the program that are used when printing tickets. Additionally, you can edit program ticket prices and configure on-sale information.

**Note:** When you add a scheduled program, all sales methods are automatically assigned as defaults and the ticket on-sale availability is set to “Immediately.” To change the default sales methods and on-sale time period, access the On-sale tab on the program. For more information, see Configure On-sale Information on page 160.

### Add a scheduled program

1. From Tickets, click **Add a scheduled program.** The Add a scheduled program screen appears. For information about this screen, see Add a Scheduled Program Screen on page 154.

2. Enter the program name and description. The information you enter here will be the default name and description for events scheduled for this program.

   **Note:** If you enter a program name greater than 40 characters, the program name will appear truncated on a printed ticket.

3. In the **Category** field, select the program type. For example, your organization may offer programs in various categories, like “Movie,” “Lecture,” and “Exhibition.”

4. In the **Location** field, select the location where program events will take place. Click the magnifying glass to search for a specific location.

   If the program occurs in multiple locations, click **Program spans multiple locations** to display the grid where you select multiple locations. For example, you may have a large lecture hall that is partitioned so the space can be used for two smaller lectures or one large lecture. In
this scenario, if a large lecture hall space is needed, you can assign both small locations and
the event will span both.

5. In the Capacity field, enter the total number of attendees the program can accommodate.
This number does not have to be the same as the location capacity, but should not exceed
location capacity. You can change the capacity on individual events as needed when program
events are scheduled.

6. Under Prices, you can load a previously created price list for the program or enter the price
types and associated face prices independently without loading a price list. These prices are
then loaded automatically for each program event you schedule. You can edit prices as
needed when you schedule events.

7. If this is a workshop, camp, or other program that requires each attendee to register, select
Requires registration. If you require registration, a Registration information tab is displayed
on the program record after you save. You can use this tab to configure registration questions,
notices, and sections like contact and medical information. The registration information you
enter here are inherited by any events you schedule for this program.

8. Under Restrict ticket sales to these memberships, select which membership programs and
levels can purchase tickets to this program. In the Tickets per transaction column, enter the
maximum number of tickets an eligible member is allowed to purchase. When you enter zero,
there is no maximum to the number of restricted tickets the member can purchase for the
selected program level.

   • If you select no membership programs or levels, the program is available to all patrons.
   • If you select “All programs” and “All levels”, the program is available to any active member.

9. On the Resources tab, you can enter supplies, equipment, and staffing resources needed for
the program. Resources added to the program automatically load for each program event you
schedule.

   • In the Supplies/Equipment resources grid, select a row and click the magnifying glass to
search for and select a resource to add to the program. Next, enter the quantity needed. For
example, if you need a projector for your Sea Life Lecture Series presentations, search for and
select a projector and then enter a 1 for the quantity needed. When you schedule the
presentations, each program event will require a resource of one projector.

   • In the Staffing resources grid, you select the resource, enter the quantity needed, and select
the type of staff member that will fill the resource need, such as volunteer, staff member, or
board member.

10. Click Save and the program record appears. From the program record, you can add fees, taxes,
and discounts, as well as assign ticket templates to the program that are used when printing
tickets. Additionally, you can edit program ticket prices and configure on-sale information. If
you required registration for this program, you can also configure registration questions,
notices, and sections for information such as like food allergies or preferred shirt sizes. For
more information, see Manage Programs on page 159.

Add a Scheduled Program Screen

The table below explains the items on the Add a scheduled program screen. For information about
how to access this screen, see Add Scheduled Programs on page 152.
<table>
<thead>
<tr>
<th>Screen Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Name and Description</strong></td>
<td>Enter text to identify the program and a detailed description. Make sure the name is unique to distinguish it from other programs. The name and description entered here will be the default name and description for events scheduled for this program.</td>
</tr>
<tr>
<td><strong>Category</strong></td>
<td>Enter a category for the program. For example, you may organize programs by type, such as seminar, film, or exhibit.</td>
</tr>
<tr>
<td><strong>Location</strong></td>
<td>In the <strong>Location</strong> field, select the location where program events will take place. Click the magnifying glass to search for a specific location. If the program occurs in multiple locations, click <strong>Program spans multiple locations</strong> to display the grid where you select multiple locations. For example, you may have a large lecture hall that is partitioned so the space can be used for two smaller lectures or one large lecture. In this scenario, if a large lecture hall space is needed, you can assign both small locations and the event will span both. The location capacity listed in the grid is displayed for informational purposes only. To change the capacity for a specific program, enter it in the <strong>Capacity</strong> field.</td>
</tr>
<tr>
<td><strong>Capacity</strong></td>
<td>Enter the total number of attendees the program can accommodate. This number does not have to be the same as the location capacity, but should not exceed location capacity. You can change the capacity on individual events as needed when program events are scheduled.</td>
</tr>
<tr>
<td><strong>Prices</strong></td>
<td>You can load a previously created price list for the program or enter the price types and associated face prices independently without loading a price list. These prices are then loaded automatically for each program event your schedule. You can edit these as needed when you schedule events.</td>
</tr>
<tr>
<td>Screen Item</td>
<td>Description</td>
</tr>
<tr>
<td>-------------</td>
<td>-------------</td>
</tr>
<tr>
<td>Require registration</td>
<td>If this is a workshop, camp, or other program that requires each attendee to register, select <strong>Requires registration</strong>. If you require registration, a Registration information tab is displayed on the program record after you save. You can use this tab to add and manage registration information such as questions and notices for programs.</td>
</tr>
</tbody>
</table>
| Restrict ticket sales to these memberships | Under **Restrict ticket sales to these memberships**, select which membership programs and levels can purchase tickets to this program.  
In the **Tickets per transaction** column, enter the maximum number of tickets an eligible member is allowed to purchase. When you enter zero, there is no maximum to the number of restricted tickets the member can purchase for the selected program level.  
- If you select no membership programs or levels, the program is available to all patrons.  
- If you select “All programs” and “All levels”, the program is available to any active member.  
**NOTE:** You can edit the restrictions on programs and events at any time. These changes will not impact any tickets that were already sold or any that are currently in the cart. |
| Resources | Select the Resources tab to enter the supplies, equipment, and staffing resources needed for the program. Resources added to the program automatically load for each program event you schedule.  
In the **Supplies/Equipment resources** grid, select a row and click the magnifying glass to search for and select a resource to add to the program. Next, enter the quantity needed. For example, if you need a projector for your Sea Life Lecture Series presentations, search for and select a projector and then enter a 1 for the quantity needed. When you schedule the presentations, each program event will require a resource of one projector.  
In the **Staffing resources** grid, you select the resource, enter the quantity needed, and select the type of staff member that will fill the resource need, such as volunteer, staff member, or board member. |

## Add Daily Admission Programs

Unlike a scheduled program that requires you to schedule specific events before you can sell tickets, the daily admission program is untimed and requires you to simply add the program to begin selling tickets. It is designed for general admission organizations who sell untimed tickets all day for admission to their facility.

**Note:** To save time, you can copy a program that already exists instead of starting with an entirely new program. A copied program retains the prices, as well as assigned discounts, fees, and taxes from the program being copied. For more information, see Copy Programs on page 175.
When you add a new daily admission program to your database, you typically enter a name and description, select a location where the program takes place, and define prices. When you define prices, you can load a previously created price list or assign valid price types and associated ticket prices without loading a price list. Additionally, you determine whether the program is available for daily sales, advance sales, group sales, and online sales.

Add a daily admission program

1. From Tickets, click Add a daily admission program. The Add a daily admission program screen appears. For more information about this screen, see Add a Daily Admission Program Screen on page 158.

2. Enter the program name and description. Make sure the name is unique to distinguish it from other programs.

3. In the Category field, select the program type. For example, you may organize programs where your organization presents a movie in a “Movie” category.

4. Under Available for sale, select the sales methods to use to sell this program. You must select at least one sales method in order to sell tickets for the program.

5. In the Location field, select the location where program events will take place. Click the magnifying glass to search for a specific location.

   If the program occurs in multiple locations, click Program spans multiple locations to display the grid where you select multiple locations. For example, you may have a large lecture hall that is partitioned so the space can be used for two smaller lectures or one large lecture. In this scenario, if a large lecture hall space is needed, you can assign both small locations and the event will span both.
6. Under **Prices**, you can load a previously created price list for the program or enter the price types and associated face prices for program tickets independently without loading a price list.

7. Click **Save** and the program record appears. From the program record, you can add fees, taxes, and discounts to the program, as well as assign ticket templates that are used when printing tickets. Additionally, you can edit program ticket prices if changes are needed. For more information, see **Manage Programs on page 159**.

### Add a Daily Admission Program Screen

The table below explains the items on the Add a daily admission program screen. For information about how to access this screen, see **Add Daily Admission Programs on page 156**.

<table>
<thead>
<tr>
<th>Screen Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Name and Description</strong></td>
<td>Enter text to identify the program and a detailed description. Make sure the name is unique to distinguish it from other programs.</td>
</tr>
<tr>
<td><strong>Category</strong></td>
<td>Enter a category for the program. For example, you may organize programs by type, such as seminar, film, or exhibit.</td>
</tr>
<tr>
<td><strong>Available for sale</strong></td>
<td>Select the sales methods through which this program will be sold. You must select at least one sales method in order to sell tickets for the program.</td>
</tr>
<tr>
<td><strong>Locations</strong></td>
<td>In the <strong>Location</strong> field, select the location where program events will take place. Click the magnifying glass to search for a specific location. If the program occurs in multiple locations, click <strong>Program spans multiple locations</strong> to display the grid where you select multiple locations. For example, you may have a large lecture hall that is partitioned so the space can be used for two smaller lectures or one large lecture. In this scenario, if a large lecture hall space is needed, you can assign both small locations and the event will span both.</td>
</tr>
<tr>
<td><strong>Prices</strong></td>
<td>You can load a previously created price list for the program or enter the price types and associated face prices independently without loading a price list. You can edit these as needed on the program record.</td>
</tr>
</tbody>
</table>

### Search for Programs

To help you quickly locate specific programs that have been added to the system, use the Program Search screen. On this screen, you can search by program name, location, or category. You can also include inactive programs in the search, as well as daily admission programs.

To include both inactive and active programs in your search, select **Include inactive**. By default, the search includes both scheduled and daily admission programs. To search only scheduled programs, clear the **Include daily admissions** checkbox.
After you have entered the necessary criteria, click **Search**. All programs that satisfy your criteria appear in the search grid.

## Manage Programs

After you add a program, you can access the individual program record to view and edit locations, on-sale information, prices and resources. You can also add discounts, fees, and taxes to a program.

When you open a program record, a number of program tasks are available. You can edit, delete, and copy the program. You can also mark programs active or inactive and refresh the screen to make sure you have the latest information. To access a program record, use the Program Search screen. For more information, see [Search for Programs on page 158](#).

## Edit Programs

After you add a scheduled or daily admission program, you can edit specific characteristics as needed. For scheduled programs, you can edit the program name, description, location, and program capacity. For daily admission programs, in addition to the program name, description, and location, you can also edit the sales methods through which the program can be sold.

### Note: You cannot edit the registration requirement for a scheduled program. If you erroneously selected **Requires registration** when the program was added, you can delete the program and add a new one.

### Edit a program

1. Access the program to edit.
2. Under **Tasks**, click **Edit program**. The Edit a program screen appears. The information you can edit on this screen depends on whether you edit a scheduled or daily admission program. For more information about this screen, see [Edit a Program Screen on page 160](#).
3. Edit the program name and description as needed. Make sure the name is unique to distinguish it from other programs. If this is a scheduled program, the name and description entered here will be the default name and description for events scheduled for this program.
4. For daily admission programs only, under **Available for sale**, select the sales methods to use to sell this program. You must select at least one sales method in order to sell tickets for the program.
5. The **Location** field displays the current location defined for the program. To change the location, click the magnifying glass.

   If the program occurs in multiple locations, click **Program spans multiple locations** to display the grid where you select multiple locations. For example, you may have a large lecture hall that is partitioned so the space can be used for two smaller lectures or one large lecture. In this scenario, if a large lecture hall space is needed, you can assign both small locations and the event will span both.

### Note: If the program being edited was originally configured with multiple locations, a **Locations** grid is displayed instead of a single **Location** field.
6. For scheduled programs only, enter a number in the **Capacity** field to reflect the total number of attendees the program can accommodate. This number does not have to be the same as the location capacity, but should not exceed location capacity. You can change the capacity on individual events as needed when program events are scheduled.

7. Click **Save**.

### Edit a Program Screen

The information you can enter on the Edit a program screen depends on whether you edit a scheduled or daily admission program. The table below explains all possible items on the screen. For information about how to access this screen, see [Edit Programs on page 159](#).

<table>
<thead>
<tr>
<th>Screen Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Name</strong> and <strong>Description</strong></td>
<td>Edit the program name and description as needed. Make sure the name is unique to distinguish it from other programs. If this is a scheduled program, the name and description entered here will be the default name and description for events scheduled for this program.</td>
</tr>
<tr>
<td><strong>Location</strong></td>
<td>In the <strong>Location</strong> field, select the location where program events will take place. Click the magnifying glass to search for a specific location. If the program occurs in multiple locations, click <strong>Program spans multiple locations</strong> to display the grid where you select multiple locations. For example, you may have a large lecture hall that is partitioned so the space can be used for two smaller lectures or one large lecture. In this scenario, if a large lecture hall space is needed, you can assign both small locations and the event will span both.</td>
</tr>
<tr>
<td><strong>Available for sale</strong></td>
<td>For daily admission programs only, select the sales methods to use to sell the program.</td>
</tr>
<tr>
<td><strong>Capacity</strong></td>
<td>For scheduled programs only, enter the total number of attendees the program can accommodate. This number does not have to be the same as the location capacity, but should not exceed location capacity. You can change the capacity on individual events as needed when program events are scheduled.</td>
</tr>
</tbody>
</table>

### Configure On-sale Information

When you add a scheduled program, all sales methods are automatically assigned as defaults and on-sale availability is set to “Immediately.” After a scheduled program is added, you can access the On-sale tab to further configure when tickets can be sold through each sales method. For example, you can configure walk-up ticket sales for a program to be available 4 weeks prior to an event and phone sales to be available 6 weeks prior to an event. The on-sale information you enter for a program is inherited by events added to the program. However, you can change on-sale information for specific events as needed.

You can configure a pre-sale period for program tickets sold online. For more information, see [Configure a members only pre-sale period for online sales on page 163](#).
Note: Unlike a scheduled program that consists of events that occur over a set period of time, a daily admission program is typically available at all times. Because of this, daily admission events are either available or not available. You can configure the sales methods through which daily admission tickets are sold, but you cannot configure a specific period of time prior to the admission to make tickets available. For information about changing the sales methods available for a daily admission program, see Edit Programs on page 159.

Add On-sale Information

On-sale information determines default sales methods and ticket availability for events added to this program. For example, you can add the “Daily Sales” sales method and set the on-sale period to 4 weeks prior to events. You could then add the “Advance Sales” sales method and set the on-sale period to 6 weeks prior to events. In this example, customers can purchase tickets over the phone before they can be purchased at the door.

Add on-sale information

1. On the program record, select the On-sale tab.
2. Click Add. The Add on-sale information screen appears.

3. Select a sales method for this program.
4. To determine when tickets for this program can be purchased through the selected sales method, configure the On-sale period begins options.
   • To make the program active now, select Immediately.
   • To set a date and time for availability, select Specific date and enter the date and time.
   • To set a specific number of days, weeks or months for availability, select the corresponding option and enter the specific duration.
5. To determine when tickets for this program should not be sold through the selected sales method, configure the On-sale period ends options.
   • To make the program inactive at time of event, select Event start time.
To make the program inactive in a specific number of minutes or hours before start, or minutes after start, select the corresponding option and enter the specific duration.

6. If you choose "Online Sales" in the Sales method field and choose an on-sale period other than “Immeditately”, you can configure the pre-sale period for online tickets.

![Add on-sale information](image)

- To allow pre-sale tickets for members, select Allow members to buy tickets in advance. In the grid, select which membership programs and levels can purchase pre-sale tickets to this program.

- In the Tickets per transaction column, enter the maximum number of pre-sale tickets per transaction an eligible member is allowed to purchase.
  - When you enter zero, there is no maximum to the number of pre-sale tickets the member can purchase for the selected program level.
  - If you select "All programs" and "All levels", the program is available to any active member during the pre-sale period.

- In the Pre-sale period begins field, select when to start the pre-sale period.

**Note:** On the On-sale tab of the program, under Pre-sale tickets, click Edit to enter the number of tickets available for pre-sale.

**Tip:** Members must sign in to your website to verify their eligibility to purchase pre-sale tickets. If users are not eligible members, options may appear on the form to encourage them to purchase the required membership.

7. Click Save.

**Configure a Members Only Pre-sale Period for Online Sales**

You can configure a members only pre-sale period for scheduled events sold online. You can define the total number of tickets available for pre-sale, when the pre-sale period begins, and which types of members are eligible to purchase tickets during this period. To configure pre-sale conditions, you must edit the on-sale information for the Online Sales sales method.

The pre-sale information you enter for a program is inherited by events added to the program. From the Pre-Sale tab of the Edit event screen, you can update pre-sale information for specific events as
Configure a members only pre-sale period for online sales

1. From the program record, select the On-sale tab.
2. Under On-sale information, expand Online Sales and click Edit.
3. On the Edit on-sale information screen, under When will tickets go on sale?, make sure the on sale period is not set to "Immediately."

4. To limit pre-sale tickets to members only, select Allow members to buy tickets in advance.
5. In the Membership program and Level columns, select which membership programs and levels are eligible to purchase pre-sale tickets to this program.
6. In the Tickets per transaction column, enter the maximum number of pre-sale tickets an eligible member is allowed to purchase.
   - When you enter zero, there is no maximum to the number of pre-sale tickets the member can purchase for the selected program level.
   - If you select "All programs" and "All levels", the program is available to any active member during the pre-sale period.
7. In the Pre-sale period begins field, select when to start the pre-sale period.
8. Click Save to return to the On-sale tab.
9. Under Pre-sale tickets, click Edit to enter the number of tickets available for pre-sale.

Tip: Members must sign in to your website to verify their eligibility to purchase pre-sale tickets. If users are not eligible members, options may appear on the form to encourage them to purchase the required membership.

10. Click Save.
Configure Program Ticket Prices

When you add a program, you can select a price list that is associated with the program. For scheduled programs, the prices you configure are loaded automatically when program events are scheduled. After you add a program, you can access the program record and change ticket prices as needed. You can delete the currently assigned prices, load a new price list, or add new prices without loading a price list. You can also add new price types.

Additionally, you can set a default quick itinerary pricing structure for programs that are commonly included in group reservation itineraries. The system will use the selected default pricing structure and rate scale when a program is selected as a quick itinerary item on a group sales reservation. If you do not want to define a default pricing structure, you can select “No default.” Add or Edit Program Ticket Prices on page 165

Set a Default Group Sales “Quick Itinerary” Pricing Structure

Pricing structures for group sales determine if groups will be charged on a per ticket basis or use a flat rate. When you set a default quick itinerary pricing structure for a program, the system will use that pricing structure and rate scale by default when the program is selected as a quick itinerary item on a group sales reservation. If you do not want to define a default pricing structure, you can leave the “No default” option in place.

Set a default group sales “quick itinerary” pricing structure

1. On the program record, select the Prices tab.
2. In the Quick itinerary defaults grid, click Edit. The Edit quick itinerary defaults screen appears.
3. Select “Per ticket” or “Flat rate” to determine the default pricing structure used when a user selects a program to use as a quick itinerary item on a group sales reservation. If you select “Flat rate,” the Rate scale field appears. Select the rate scale to use. After you select a flat rate and a rate scale to use, you can view the rate scale and edit it if necessary. To view the rate scale record, click it in the grid.

Note: If you would rather not configure a default pricing structure, select “No default” in the Pricing structure field. This means a user must select the correct pricing structure each time they select program to use as a quick itinerary item on a group sales reservation.

4. Click Save. You return to the program record.

Load Program Ticket Prices From a Price List

Price lists are helpful in that they allow you to quickly assign ticket prices to a program. After a price list is loaded, the prices can be edited as needed. When you load a price list, it will replace any ticket prices currently assigned to the program. Before you can load a price list, it must be added by a user with the required system permissions.
Load program ticket prices from a price list

1. On the program record, select the Prices tab.
2. Click **Load price list**. The Load price list screen appears.
3. Select a price list to load. Before you can load a price list, it must be added by a user with the required system permissions.

**Warning:** When you load a price list, it will replace all ticket prices currently assigned to the program.

4. Click **Save**. The price list is loaded and the ticket prices and corresponding price types are displayed.

Add or Edit Program Ticket Prices

You can add or edit ticket prices assigned to a program at any time. For a scheduled program, the prices you add or edit are applied to all events currently scheduled, except for events that have custom prices. If the prices on a specific event have been edited, those prices are considered custom and are not altered when prices are added or edited for a program.

**Note:** Changes you make to price lists do not filter down to programs and events. Price lists are simply a quick way to load commonly used prices for programs and events.

Add or **edit** program ticket prices

1. On the program record, select the Prices tab.
2. Click **Add** or **Edit**. The Edit prices screen appears.
3. Select a price type. If the price type you need does not appear in the list, enter a new one. A confirmation message appears when a new price type is created.

4. Enter the face price for the selected price type. The face price is the advertised price of the ticket.

5. Click Save.

Delete Program Ticket Prices

You can delete ticket prices assigned to a program at any time. For scheduled events, the prices you delete for a program are also deleted from all events currently scheduled, except for events that have custom prices. If the prices on a specific event have been edited, those prices are considered custom and are not altered or removed if prices on a program are deleted.

Delete program ticket prices

1. On the program record, select the Prices tab.
2. In the grid, select the price to delete and click Delete. A confirmation screen appears.
3. Click Yes.

Manage Program Discounts

After you add a scheduled or daily admission program, you can access the program record and assign discounts. If the discounts you assign to programs are generally the same, you can copy discounts
currently assigned to another program to save time. If a discount is no longer valid for a program, you can remove it from the program record.

**Note:** After you assign discounts to a scheduled program, the discounts are loaded automatically when program events are scheduled.

## Assign Discounts to Programs

You can assign discounts to a program at any time. Before you can assign a discount to a program, it must be added to the system by a user with the required permissions.

**Note:** The discounts you assign to a scheduled program are also assigned to any events that are currently scheduled, as well as any subsequent events you schedule.

### Assign discounts to a program

1. On the program record, select the Discounts tab.
2. Click **Add**. The Discount Search screen appears.

![Discount Search Screen](image)

3. Use the search criteria fields to locate the discount to assign to the program. You can search by discount name, type, calculation type, or the way the discount is selected for use. If you would like discounts marked inactive to appear in your search results, select the **Include inactive** checkbox.

**Note:** Since discounts that apply to an entire order are automatically added to the order when they meet the discount's availability criteria, the **Applies to** field is automatically set to “Item,” and not available for use.

4. Click **Search**. All results that meet the search criteria appear in the **Results** grid.
Note: To search for all configured discounts, leave all criteria fields empty and click Search. All discounts that have been configured appear in the Results grid.

5. In the Results grid, select the discount to assign to the program and click Select. You return to the program record.

Note: To open a discount record, click the link to the discount in the grid.

Discount Search Screen

The table below explains the items on the Discount Search screen. For information about how to access this screen, see Assign Discounts to Programs on page 167.

<table>
<thead>
<tr>
<th>Screen Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>If you know the name of the discount to assign to the program, enter it in Name field.</td>
</tr>
<tr>
<td>Type</td>
<td>Select whether the discount is a standard discount, or if it is a discount that requires the full purchase of another item.</td>
</tr>
<tr>
<td>Applies to</td>
<td>Since discounts that apply to an entire order are automatically added to the order when they meet the discount’s availability criteria, the Applies to field is automatically set to “Item,” and not available for use.</td>
</tr>
<tr>
<td>Calculation type</td>
<td>Select whether the discount is calculated as an amount off or a percentage off of a purchase.</td>
</tr>
<tr>
<td>Selected for use</td>
<td>Select whether the discount is added to the order automatically, manually by the Admissions Coordinator, or with the entry of a valid promotional code.</td>
</tr>
<tr>
<td>Include inactive</td>
<td>Select this checkbox to include discounts marked inactive in your search results, select the Include inactive checkbox.</td>
</tr>
<tr>
<td>Search (button)</td>
<td>After you enter criteria, to activate the search, click the button.</td>
</tr>
<tr>
<td>Clear (button)</td>
<td>To remove your criteria and begin a new search, click the button.</td>
</tr>
<tr>
<td>Results (grid)</td>
<td>The search results appear in this bottom grid. Select a constituent from the grid to open.</td>
</tr>
<tr>
<td>Select (button)</td>
<td>In the Results grid, select a constituent and click the button. The constituent page appears.</td>
</tr>
</tbody>
</table>

Remove Discounts from Programs

If a discount is no longer valid for a program, you can remove it from the program record. When discounts are removed from a scheduled program, they are also removed from all events currently scheduled for the program.
Remove discounts from a program
1. On the program record, select the Discounts tab.
2. In the grid, select the discount to remove and click Delete. A confirmation message appears.
3. Click Yes. You return to the program record.

Copy Program Discounts
After you add a program, you can access the program record and assign discounts. If the discounts you assign are generally the same, you can save time by copying discounts currently assigned to another program. After discounts are assigned, they are associated with the program and loaded automatically when program events are scheduled.

Copy discounts from another program
1. On the program record, select the Discounts tab.
2. Click Copy from. The Copy discounts screen appears.
3. In the Copy from field, click the magnifying glass to select a program. A search screen appears.
4. Use the search screen to locate the program to copy. For more information, see Search for Programs on page 158. The program you select appears in the Copy from field.
5. Click Save. The discounts are copied and displayed on the Discounts tab.

Manage Program Ticket Templates
After you add a scheduled or daily admission program, you can access the program record and assign sales document templates. Sales document templates determine the appropriate sales documents that are printed, such as tickets or receipts, when a patron purchases tickets to a program and the order is completed. After you assign sales document templates to a program, you can prioritize them for use when printing sales documents. If a template is no longer valid for a program, you can remove it from the program record. For more information about sales document templates, see Configure Ticket and Sales Document Templates on page 128.

Assign Ticket Templates to Programs
After you configure ticket templates, you must assign them to programs. When patrons purchase tickets to programs, the system uses the ticket template assigned to the program record to determine the layout and design of the ticket, as well as the printer the ticket will be printed on. You can assign ticket templates to a program at any time. Ticket templates are also prioritized when they are assigned to programs.
Assign ticket document templates to programs

1. On the program record, select the Tickets tab.
2. Click Add. The Add a ticket template screen appears.
3. In the Template field, select a ticket template. Included in the drop-down list are default templates, as well as templates configured by the user.
4. Click Save. You return to the program record.

Note: After you assign ticket templates to a program, you can use the up and down arrows to create a prioritized list of templates for use. Use the Priority column in the Ticket templates grid to view the currently set priority of templates. For information about how to prioritize ticket templates, see Prioritize Ticket Templates on page 170.

Prioritize Ticket Templates

After you assign ticket templates to programs, you can prioritize them for preferred use. When you print tickets, the system will attempt to print using the template prioritized as first, and if necessary will continue down the list, in order, until a compatible template is located and the ticket is successfully printed. You can adjust the priority of ticket templates at any time.

Prioritize ticket templates

1. On the program record, select the Tickets tab.
2. In the Ticket templates grid, select the template to make higher or lower priority in the list of templates.
3. Click the up or down arrow to prioritize the ticket template accordingly.

Note: Use the Priority column in the Ticket templates grid to view the currently set priority of templates. The template with the priority of 1 is the highest priority template.
4. Review the list of ticket templates to verify the correct priority has been set.

Remove Ticket Templates from Programs

If a sales document template is no longer valid for a program, you can remove it from the program record. When sales document templates are removed from a scheduled program, they are also removed from all events currently scheduled for the program.

Remove sales document templates from programs

1. On the program record, select the Tickets tab.
2. Click Delete. A confirmation message appears.
3. Click Yes. You return to the program record.
Configure Program Fees and Taxes

After you add a program, you can access the program record and assign fees and taxes. After fees and taxes are assigned, they are associated with the program and loaded automatically when program events are scheduled.

**Note:** You can add only per item fees to programs. When you add a per item fee to a program, the fee is charged for each ticket purchased. You cannot add per order fees to programs.

Add Program Fees

You can add “Item” fees to programs at any time. The fees you add to a program are also assigned to all currently scheduled program events, as well as any new events you schedule. Before you can assign a fee, it must be added to the system by a user with the required permissions.

> Add a fee to a program

1. On the program record, select the Fees and Taxes tab.
2. Click Add. The Add a fee screen appears.

**Note:** Because you can assign only per item fees to programs, the drop-down list on the Add a fee screen contains only “Item” fees. When you assign a per item fee to a program, the fee is charged for each ticket purchased. You cannot assign per order fees to programs.

3. Select a fee to assign to the program. Before you can assign a fee, it must be added to the system by a user with the required permissions.
4. Click Save. You return to the program record.

Remove Program Fees

If a fee is no longer valid for a program, you can remove it. When fees are removed from a program, they are also removed from all events currently scheduled for the program.

> Remove fees from a program

1. On the program record, select the Fees and Taxes tab.
2. In the grid, select the fee to remove and click Remove. A confirmation screen appears.
3. Click Yes.

Copy Program Fees

After you add a program, you can access the program record and assign “Item” fees. If the fees you assign are generally the same, you can save time by copying fees currently assigned to another program. After fees are assigned, they are associated with the program and loaded automatically when program events are scheduled.
Copy fees from another program

1. On the program record, select the Fees and Taxes tab.
2. Click **Copy from**. The Copy fees screen appears.
3. In the **Copy from** field, click the magnifying glass to select a program. The Program Search screen appears.
4. Use the search screen to find the program to copy. For more information, see Search for Programs on page 158.
5. In the search results grid, highlight the program and click **Select**. You return to the Copy fees screen and the program to copy is displayed in the **Copy from** field.

**Warning:** When you copy fees from another program, those fees will replace all fees currently assigned.
6. Click **Save**. The fees are copied and displayed on the Fees and Taxes tab.

Add Program Taxes

You can add taxes to a program at any time. The taxes you add to a program are also added to all currently scheduled program events, as well as any new events you schedule. Before you can add a tax to a program, it must be added to the system by a user with the required permissions.

**Note:** When a tax rate changes for an existing tax, you will need to manually change the tax rate when the new rate becomes effective.

Add a tax to a program

1. On the program record, select the Fees and Taxes tab.
2. Click **Add**. The Add a tax screen appears.
3. Select a tax to assign. Before you can assign a tax, it must be added to the system by a user with the required permissions.
4. Click **Save**. You return to the program record.

Remove Program Taxes

If a tax rate is no longer valid for a program, you can remove it. When taxes are removed from a program, they are also removed from all events currently scheduled for the program.

**Note:** If a program is tax exempt for a patron, you can remove its taxes on the group sales reservation record under **Pricing** and **Other adjustments**, or from the Order summary for daily and advance sales.

Remove taxes from a program

1. On the program record, select the Fees and Taxes tab.
2. In the grid, select the tax to remove and click **Remove**. A confirmation screen appears.
3. Click Yes.

Manage Program Resources

Supplies/Equipment and staffing resources are items or people which may be required for a program event. For example, you may offer a program that requires a projector or other electronic equipment, chairs, or information packets. Before you can assign required resources to an event, the resources must be added to the system. For more information about how to add resources, see the Configuration Tasks section.

On the program record, you can manage the program resources on the Resources tab. On the Resources tab, you can add resources, edit resources, delete resources not needed, and go to a resource record for more information.

To go to a resource record, click the name of the resource. The resource record appears. On the resource record you can make adjustments as necessary. However, adjustments to the resource record affect all programs and program events. For more information about resources, see the Configuration Tasks section.

Add program resources
1. On the program record, select the Resources tab.
2. Click Add. The Add a resource screen appears.
3. In the Resource field, click the magnifying glass and use the Resource Search screen to find and select a resource to add to the program.
4. For supplies/equipment resources, if you selected a per ticket resource, the per ticket quantity needed from the resource displays. If you did not select a per ticket resource, in the **per ticket quantity needed** field, enter the number of resources for the event.
   For staffing resources, in the **Quantity needed** field, enter how many staff you need for the event.
5. If you are adding a staffing resource, in the **Filled by** field, select which type of staffing resource is needed such as a volunteer, staff member, or board member.
6. Click Save. You return to the program record.

Edit a program resource
1. On the program record, select the Resources tab.
2. In the grid, select a resource and click Edit. The Edit a resource screen appears. Make changes as necessary.
3. Click Save. You return to the program record.

Delete a program resource
1. On the program record, select the Resources tab.
2. In the grid, select the resource and click Delete. A confirmation message appears.
3. Click Yes. You return to the program record and the resource no longer appears in the grid.

Manage Program Registration Information

For preregistered program events, from the Program page, you can manage your registration information. Registration information are the sections and questions you create to obtain information about your registrants, such as name, address, allergies, and preferences.

To manage registration information, from a Preregistered Program page, click the Registration Information tab. On this tab, you add, edit, delete, and mark questions and notices as active or inactive. To delete or mark items active or inactive, select its row and click their respective button.

**Note:** You cannot delete sections from the Program page, you must delete sections from the Manage Registration Forms page. For information about the Manage Registration Forms page, see Manage Registration Forms on page 59.

**Note:** You can also enter registration questions and notices from the Manage Registration Forms page. Also, you can only delete sections from this page. For information about the Manage Registration Forms page, see Manage Registration Forms on page 59.

> **Add or Edit a Registration Question**

1. On the Registration Information tab, under Registration information, click Add, Question. The Add a question screen appears.
2. To edit a question, select the row, and click Edit and make changes as necessary.
3. In Registration section, select or enter a section. A section refers to where it appears on a registration form.
4. In Registration question, select or click the New icon, to add a new registration question. If you click the New icon, the Add a question screen appears. For information about this screen, see Add or edit registration questions on page 60
5. If the question requires a response, select Required.
6. To add your question, click Save. The question appears under Registration Information in the section you added.

> **Add or Edit a Registration Notice/Disclaimer**

1. On the Registration Information tab, under Registration information, click Add, Notice/disclaimer. The Add a Notice/disclaimer screen appears.
2. To edit a notice/disclaimer, select the row, and click Edit and make changes as necessary.
3. In Registration section, select or enter a section. A section refers to where it appears on a registration form.
4. In Registration question, select or click the New icon, to add a new registration notice/disclaimer. If you click the New icon, the Add a notice/disclaimer screen appears. For information about this screen, see Add or edit registration notice/disclaimer on page 60
5. To add your notice/disclaimer, click Save. The question appears under Registration
Create Program Description for Web Forms

On the Web Forms tab of the program record, you can add, edit, and delete a description for the program. When you create web forms in Web to sell online tickets for the program or its events, the description then appears on the web forms.

**Add program description to display on web forms**

1. On the program record, select the Web Forms tab.
2. Click **Edit**. The Edit program description for web forms screen appears.
3. In the editor, enter the description. When you create a web form in Web for this program or its events, the description appears on the web form.

**Note:** You can customize the program description for particular events from the program event record. For information, see [Create Event Description for Web Forms on page 198](#).

4. Click **Save**. You return to the program record.

Copy Programs

To save time, you can copy a program that already exists instead of starting with an entirely new program. A copied program retains the on-sale settings and prices, as well as assigned discounts, fees, and taxes from the program being copied. Additionally, if copying a program that requires registration, all registration questions, notices, and sections defined on the program are retained.

You can copy both scheduled programs and daily admission programs. After the copied program is added, you can edit it as needed.

**Note:** When you copy a scheduled program, currently scheduled events are not copied to the new program.

**Copy a program**

1. On the program record, click **Copy program** under **Tasks**. The Copy a Program screen appears. The information you can enter on this screen depends on whether you copy a scheduled or daily admission program.
2. Enter a name and description for the new program. Make sure the name is unique to distinguish it from other programs. If you copy a scheduled program, the name and description entered here will be the default name and description for events scheduled for the program.

3. The **Location** field displays the location defined for the program being copied. To change the location for the new program, click the magnifying glass. The location capacity listed in the grid is displayed for informational purposes only.

If the program occurs in multiple locations, click **Program spans multiple locations** to display the grid where you select multiple locations. For example, you may have a large lecture hall that is partitioned so the space can be used for two smaller lectures or one large lecture. In this scenario, if a large lecture hall space is needed, you can assign both small locations and the event will span both.

**Note:** If the program being copied was originally configured with multiple locations, a **Locations** grid is displayed instead of a single **Location** field.

4. For scheduled programs only, enter a number in the **Capacity** field to reflect the total number of attendees the program can accommodate. This number does not have to be the same as the location capacity, but should not exceed location capacity. You can change the capacity on individual events as needed when program events are scheduled.

5. Click **Save** and the new program record appears. If this is a scheduled program, you can now schedule events. You can also change program ticket prices, as well as the fees, taxes, discounts, and registration information assigned to the program. For more information, see **Manage Programs on page 159**.

---

### Copy a Program Screen

The information you can enter on the Copy a program screen depends on whether you copy a scheduled or daily admission program. The table below explains all possible items on the screen. For information about how to access this screen, see **Copy Programs on page 175**.
<table>
<thead>
<tr>
<th>Screen Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name and Description</td>
<td>Enter text to identify the new program and a detailed description. Make sure the name is unique to distinguish it from other programs. If you copy a scheduled program, the name and description entered here will be the default name and description for events scheduled for the program.</td>
</tr>
<tr>
<td>Location</td>
<td>The Location grid includes the locations defined for the program being copied. To change the location for the new program, add or remove locations in the grid. Click the magnifying glass to search for a specific location. The location capacity listed in the grid is displayed for informational purposes only. If the program occurs in multiple locations, click Program spans multiple locations to display the grid where you select multiple locations. For example, you may have a large lecture hall that is partitioned so the space can be used for two smaller lectures or one large lecture. In this scenario, if a large lecture hall space is needed, you can assign both small locations and the event will span both.</td>
</tr>
<tr>
<td>Capacity</td>
<td>For scheduled programs only, enter the total number of attendees the program can accommodate. This number does not have to be the same as the location capacity, but should not exceed location capacity. You can change the capacity on individual events as needed when program events are scheduled.</td>
</tr>
</tbody>
</table>

Delete Programs

When you delete a program, it is removed from your database. After programs are involved in a sales transaction, they cannot be deleted. Instead, programs with transaction activity can be marked inactive. When you mark a program inactive, it does not appear in search results unless you select Include inactive on the Program Search screen.

▶ Delete a program

1. Open the program record and click Delete program under Tasks. A confirmation screen appears.
2. To delete the program, click Yes.

Reorder Registration Information

On the program or program event record of a preregistered program, you can organize how registration questions and sections appear for daily and advance sales, as well as, online sales.

To reorder the question and sections, on the Registration Information tab of a preregistered program or program event, click Reorder list. On the screen that appears, use the up and down arrows to rearrange the sections and the registration information within them. After you are finished, click Save.
Note: You can reorder lists on the program, but you can only reorder lists for program events that use custom registration information. For information about how to use custom registration information, see Configure Program Event Registration Information on page 197.

View the Program Calendar

On the Program Calendar, you can efficiently view all scheduled program events, as well as special fundraising events. You can view events by month, week, or day to get an overall view of what is currently happening at your organization and you can use the calendar as a tool to help coordinate staffing needs. To access the Program Calendar, from Tickets, click Program calendar.

Note: The Program Calendar displays only scheduled program events and special fundraising events. Because daily admission programs are typically available at all times and do not have start and end times, there is no need to display them on the calendar.

When you first open the Program Calendar, the current month appears with the current date highlighted. You can adjust the period of time that appears as necessary.

- To view the events for another month, click the left or right arrow in the thumbnail calendar to navigate to the month to view.
- To view the dates on the calendar in a daily or weekly format, click Day or Week above the calendar. To return to the monthly format, click Month.
- To view the events for a specific date, in the Jump to date field, select the date to view. To return to the current date, click Today above the calendar.

Under Filters, you can select the type of events to view. You can select to view scheduled program events, special fundraising events, or both. To view a type of event, select its checkbox. To help you navigate through the information on the calendar, each event type is color-coded. To view more information about an event on the calendar, click the event name link. The event record appears.

In addition to viewing program events and special fundraising events, there are a number of tasks you can complete from the program calendar. For example, you can schedule new program events. To schedule events from the calendar, click Schedule events under Tasks. The Program Search screen appears. After you locate the program to schedule, you can add events. For more information, see Schedule Program Events on page 180.

You can also copy a day or week of events from the calendar, as well as edit or delete individual program events. For more information about event processes, see Program Events on page 179.
Program Events

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After you add a scheduled program, you schedule program events. Each event you schedule determines when and where each separate occurrence of a program takes place. For example, your organization may offer a “Sea Turtles” program that has three daily showings. In this case, you will schedule each showing by selecting the specific location, as well as the day, date, and time each occurs. Program events can be scheduled as a one-time occurrence or as events that recur on a daily, weekly, or monthly basis. Before you can sell tickets to a program, you must schedule program events.

**Note:** Program events are typically scheduled on a regular basis by a program coordinator. The person who fills this role within your organization usually reviews upcoming programs, adds them to the system, and schedules related events.

### Schedule Program Events

**Note:** The sales methods and ticket on-sale availability for an event are initially determined by the defaults defined for the program. After you add an event, you can change the default sales methods and on-sale time period. For more information, see [Edit Program Events on page 191](#).

With date recurrence settings, you can schedule program events to occur on a single date, or every day, weekly, or monthly. Depending on the date recurrence setting you select, you enter additional information to control when the event occurs. For example, if you select **Monthly**, you also select start and end dates, as well as select a day that the event occurs each month or specify the number of months that pass between each recurrence.

When you schedule events, you also enter start times for each. You can enter start times manually per day or by pattern. If you have only a few events, you can enter the start times manually. However, if you need to schedule events that have regular, frequent start times throughout the day, it is more efficient to enter start times by pattern. For example, you can quickly schedule a daily event to occur every 15 minutes.

Most events you schedule will have a single location. However, if needed, you can schedule events that span multiple locations. For example, you may have a large lecture hall that is partitioned so the space can be used for two smaller lectures or one large lecture. If needed, you can schedule the event to span both lecture hall locations if additional space is required.

Some events may also require the use of certain resources, such as supplies, equipment, or a staff member. When you schedule events, you can also indicate what resources are needed, and how many are needed.

#### Schedule a program event

1. From **Tickets**, click **Schedule program events.** The Program Search screen appears. Enter criteria to locate the program and click **Search.**

2. In the **Results** grid, select a program and click **Select.** The schedule screen appears with the program title at the top.
3. The name and description default in from the program. You can make changes to this information as needed. The information entered here will be used for each event scheduled.

4. The location details on the schedule event screen default from the program and are different based on whether events take place in a single location or span multiple locations.
   - If a single location was defined on the program, the **Location** field appears and displays the location defined on the program. To assign a new location, click the magnifying glass. At least one location is required.
   - If multiple locations were defined on the program, the **Location** field does not appear. Instead, access the Multiple locations tab to view and change the locations the events will span. For example, you may have a large lecture hall that is partitioned so the space can be used for two smaller lectures or one large lecture. In this scenario, if a large lecture hall space is needed, you can assign both small locations and the event will span both. In the grid on the Multiple locations tab, adjust the locations as needed and return to the General tab.

5. The **Capacity** field defaults in from the location assigned to the program. If multiple locations are defined, the combined capacity of those locations appears in this field. If no default locations were entered on the program, this field is blank until you select locations on the schedule event screen. If needed, you can change the capacity in this field to meet the needs of the event.

6. Under **Date recurrence**, determine how often events occur. Events can happen on a single day or can recur on a daily, weekly, or monthly basis. Different day, date, and time configuration options appear when you make a selection in the **Recurrence** field. For example, to schedule an event on a monthly basis, select **Monthly**. You then select start and end dates, and either specify the day that the event occurs each month or the number of months that should pass between each recurrence.

7. When you configure event duration and start times, you can enter times manually per day or by pattern. If you have only a few events, you can enter the start times manually. However, if you need to schedule events that have regular, frequent start times throughout the day, it is more efficient to enter start times by pattern. For example, you can quickly schedule a daily event to occur every 15 minutes.
• To enter start times manually, under **Time recurrence**, select Single time or Multiple times in the **Time per day** field. If you select Single time, enter the period of time to schedule events in the **From** and **To** fields. For example, 9:00 AM to 5:00 PM. Make sure you enter AM and PM as needed. If you select Multiple times, enter the event duration and in the **Daily start times** grid, enter the start times for each occurrence.

• To enter times by pattern, select the Start time pattern tab. In the **Events should start every** fields, enter how often the event should occur. For example, every 15 minutes. In the **Each event should last** fields, enter the duration for each event. The duration you enter must be shorter than the time between events. In the **Start first event at** and **No event should extend past** fields, enter the period of time during which the events will take place, for example, 9:00 AM to 5:00 PM. Make sure you enter AM and PM as needed. Next, click **Create start times** and the times are generated and displayed in the grid. You can make changes as needed to adjust start times and then click **Replace start times** to apply the changes.

**Note:** The **Events to be scheduled** field displays the number of events for the settings you select. The number of events changes based on the recurrence settings.

8. To view and adjust the equipment and staffing resources needed for the events, select the **Resources** tab. If resource defaults were configured on the program, they appear here. Add or edit the supplies/equipment or staffing resources you need for the scheduled program events. In the grids, add a separate row for each resource required.

9. Click **Save**. If all events are successfully scheduled, the program record appears and the new events appear on the **Calendar** tab and the **Event List** tab. However, if any conflicts exist for the events you attempted to schedule, the **Conflicts** tab appears. For information about conflict resolution, see **Resolve Schedule Conflicts** on page 185.

10. After you schedule program events, you can access individual event records to view and edit schedule details, event prices, resources, registrant information, and sales methods assigned to the event. To access an event record, on the **Calendar** tab or **Event List** tab of the program record, click an event. For more information, see **Manage Program Events** on page 190.

**Note:** If you assign staffing resources to the program event, you must also schedule people to fill those resource positions after the events are scheduled. To assign people to fill the resource positions needed, access the **Resources** tab on the event record. In the **Staffing resources** grid, select a resource and click **Edit**. On the Edit staffing resource screen, in the **Assigned staff** grid, click the magnifying glass to select a person to fill the staff resource position. Repeat for each staff resource needed for the event. For more information, see **Staff Resources for Program Events** on page 195.

**Tip:** When the program record appears after you schedule events, you can undo the last schedule run, which will remove the events you just scheduled. This is helpful if you scheduled a number of events in error or if multiple conflicts exist. For more information, see **Undo the Last Schedule Run** on page 184.

### Schedule Screen

The table below explains the items on the **Schedule** screen. For information about how to access this screen, see **Schedule Program Events** on page 180.
<table>
<thead>
<tr>
<th>Screen Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name and Description</td>
<td>The event name and description default in from the program. You can make changes to this information as needed. The name and description entered here will be used for each event scheduled.</td>
</tr>
<tr>
<td>Location</td>
<td>The location details from the schedule event screen default in from the program and are different based on whether events will take place in a single location or span multiple locations. If a single location was defined on the program, the Location field appears and displays the location. To assign a new location, click the magnifying glass. At least one location is required. For information about multiple locations, see the Multiple locations tab entry below.</td>
</tr>
<tr>
<td>Capacity</td>
<td>The capacity in this field comes from the default location assigned to the program. If multiple locations are defined, the combined capacity of those locations appears in this field. If no default locations were entered on the program, this field is blank until you select locations on the schedule event screen. If needed, you can change the capacity in this field to meet the needs of the event.</td>
</tr>
<tr>
<td>Date recurrence</td>
<td>Determine how often events occur. Events can happen on a single day or can recur on a daily, weekly, or monthly basis. Different day, date, and time configuration options appear when you make a selection in the Recurrence field. For example, to schedule an event on a monthly basis, select Monthly. You then select start and end dates, and either specify the day that the event occurs each month or the number of months that should pass between each recurrence.</td>
</tr>
<tr>
<td>Time recurrence</td>
<td>Determine the duration and start times of the events. Event duration is required information. When you configure event duration and start times, you can enter times manually per day or by pattern. If you have only a few events, you can enter the start times manually. To enter start times manually, under Time recurrence, select Single time or Multiple times in the Time per day field. If you select Single time, enter the period of time to schedule events in the From and To fields. For example, 9:00 AM to 5:00 PM. Make sure you enter AM and PM as needed. If you select Multiple times, enter the event duration and in the Daily start times grid, enter the start times for each occurrence. If you need to schedule events that have regular, frequent start times throughout the day, it is more efficient to enter start times by pattern. For example, you can quickly schedule a daily event to occur every 15 minutes. For more information, see the Start time pattern tab entry below.</td>
</tr>
<tr>
<td>Daily start times</td>
<td>Enter the start time for the event. You must enter at least one start time in the grid. To define multiple event occurrences, enter multiple start times in the grid.</td>
</tr>
<tr>
<td>Events to be scheduled</td>
<td>This field displays the number of events for the settings you select. The number of events changes based on the recurrence settings.</td>
</tr>
<tr>
<td>Screen Item</td>
<td>Description</td>
</tr>
<tr>
<td>-------------</td>
<td>-------------</td>
</tr>
<tr>
<td><strong>Start time pattern tab</strong></td>
<td>To enter times by pattern, select the Start time pattern tab. In the <strong>Events should start every</strong> fields, enter how often the event should occur. For example, every 15 minutes. In the <strong>Each event should last</strong> fields, enter the duration for each event. The duration you enter must be shorter than the time between events. In the <strong>Start first event at</strong> and <strong>No event should extend past</strong> fields, enter the period of time during which the events will take place, for example, 9:00 AM to 5:00 PM. Make sure you enter AM and PM as needed. Next, click <strong>Create start times</strong> and the times are generated and displayed in the grid. You can make changes as needed to adjust start times and then click <strong>Replace start times</strong> to apply the changes.</td>
</tr>
<tr>
<td><strong>Multiple locations tab</strong></td>
<td>On this tab, you can view and change the locations the events will span. For example, you may have a large lecture hall that is partitioned so the space can be used for two smaller lectures or one large lecture. In this scenario, if a large lecture hall space is needed, you can assign both small locations and the event will span both. In the grid on the Multiple locations tab, adjust the locations as needed and return to the General tab. If multiple locations are defined, the combined capacity of those locations appears in the <strong>Capacity</strong> field on the General tab.</td>
</tr>
<tr>
<td><strong>Resources tab</strong></td>
<td>On the Resources tab, enter what resources are required for the program events. Enter each resource on a separate row in the grids. To add a resource, click on a cell in the <strong>Resource</strong> column, binoculars appear to search for resources. To remove a resource, click the <strong>X</strong> on the row you no longer need. For Supplies/Equipment resources, you select the resource and enter the quantity needed. You do not need to enter a value for resources calculated on a per ticket basis. For Staffing resources, you select the resource, enter the quantity needed, and select the staff type, such as volunteer, staff member, or board member. If you assign staffing resources, you must also schedule people to fill those resource positions after the events are scheduled. To assign people to fill the resource positions needed, access the Resources tab on the event record. In the <strong>Staffing resources</strong> grid, select a resource and click <strong>Edit</strong>. On the Edit staffing resource screen, in the <strong>Assigned staff</strong> grid, click the magnifying glass to select a person to fill the staff resource position. Repeat for each staff resource needed for the event.</td>
</tr>
</tbody>
</table>

**Undo the Last Schedule Run**

If you schedule events for a program in error, or decide you no longer want these events to exist, you may want to undo the entire schedule run instead of removing each event individually. A “run” is the action of scheduling program events. You cannot undo a run if any events scheduled during the run have any sales activity.

When you schedule program events, it is possible to generate conflicts with other events that already exist in the same time slot or location. You can undo the last schedule run to resolve conflicts if a large number of conflicts are created when you schedule events. Conflicts created during a run are grouped
together by the date and time the run was performed. If you undo a run, the conflicted events and any
events that were scheduled successfully during the run are removed.

> **Undo the last schedule run**

1. From *Tickets*, click **Program search**. The Program Search screen appears.
2. Enter criteria to locate the program and click **Search**. In the **Results** grid, select a program and
   click **Select**. The program screen appears.
3. Under **Tasks**, click **Undo Last Schedule**. A confirmation screen appears.
4. To proceed with the undo, click **Yes**. Any events that were scheduled or conflicts generated
during the last run are removed.

### Resolve Schedule Conflicts

You can schedule multiple program events at once to maximize efficiency. However, when you
schedule multiple events that span a significant period of time, you may end up with schedule
conflicts that must be resolved. Typical conflicts include scheduling an event in the same location and
time slot as a previously scheduled event. If schedule conflicts exist, they appear on the Conflicts tab
of a program record.

*Note:* When you create a new event that conflicts with a previously scheduled event, the new event is
not scheduled. Instead, the new event appears only on the Conflicts tab until all conflicts are resolved.

To resolve schedule conflicts, you have multiple options. Each option is different and will affect your
schedule run in different ways. For example, you can completely undo a schedule run and start fresh or
address each conflict individually. Before you begin to resolve schedule conflicts, make sure you
review each option carefully and select the solution that meets your needs and provides the best
results for your situation. You may need to check with the user who created the conflicts to understand
fully which events should remain and which should be rescheduled or removed. To resolve conflicts,
you have the following options:

- You can undo the last scheduling run performed for a program. This option removes the conflicts,
as well as any successfully scheduled events from the last schedule run. This allows you to
completely start over and schedule events again. For more information, see **Undo the Last
Schedule Run on page 184**.
- You can override conflicts to schedule events. With this option, you disregard the conflicts and
schedule the events anyway. This option removes the conflicts, and results in multiple events with
the same locations or time slots that need to be account for manually. You can override conflicts to
schedule individual events or a group of events. For more information, see **Override Conflicts to
Schedule Events on page 186**.
- You can delete newly created events that are in conflict. If you choose to delete events to resolve
conflicts, the events that were just created are always deleted, not the events that already existed
and were successfully scheduled. You can delete individual events or a group of events. For more
information, see **Delete Schedule Conflicts on page 186**.
- You can edit newly scheduled events that are in conflict to change the date, time, resource, or
location so they are no longer in conflict. If the new information you select resolves the current
conflict and no other conflicts are introduced, the events are saved. For more information, see Edit New Scheduled Events on page 187.

- You can edit previously scheduled events that are now in conflict with new events to change the date, time, resource, or location so they are not in conflict. If the new information you select resolves the current conflict and no other conflicts are created, you can then proceed to successfully schedule the new events. For more information, see Edit Previously Scheduled Events on page 189.

After conflicts are resolved, they no longer appear on the Conflicts tab. Any events successfully scheduled as the result of conflict resolution appear on the Calendar tab and Event List tab of the program record. After all conflicts are handled, the Conflicts tab disappears.

Override Conflicts to Schedule Events

You can disregard conflicts that arise and schedule events anyway. This option removes the conflicts, resulting in multiple events with the same locations or time slots, and will need to be accounted for manually. For example, you intentionally schedule a lecture to take place at the same time and location as another lecture that has already been successfully scheduled. To resolve this conflict, you can override the schedule conflicts because you plan to divide the room in half with a partition to accommodate both events.

Override conflicts to schedule an event

1. From Tickets, click Program search. The Program Search screen appears.
2. Enter criteria to locate the program and click Search. In the Results grid, select a program and click Select. The program screen appears.
3. Select the Conflicts tab.
4. In the grid, select the conflict or conflicts to disregard in order to force schedule the associated events.

Warning: When you disregard the conflict and force schedule, you intentionally double-book events. This will result in two events that are scheduled in the same location and time slot and must be manually accounted for.

5. Click Schedule. A confirmation screen appears.
6. To proceed with the override, click Yes. The conflict is disregarded and both events are scheduled. After you override a conflict and force schedule events, the conflict no longer appears on the Conflicts tab.

Note: To handle multiple conflicts at one time, hold down CTRL on your keyboard and select each event.

Delete Schedule Conflicts

When you delete events to resolve conflicts, the events that were most recently created are always deleted, not the events that were already scheduled. You can delete individual event conflicts or a
group of event conflicts.

Delete schedule conflicts

1. From Tickets, click Program search. The Program Search screen appears.
2. Enter criteria to locate the program and click Search. In the Results grid, select a program and click Select. The program screen appears.
3. Select the Conflicts tab.
4. In the grid, select the conflict or conflicts to delete. This deletes the event or events that were just created and are in conflict. The events that already existed and were successfully scheduled are not deleted.
5. Click Delete. A confirmation message appears.
6. Click Yes. The conflict is deleted and is removed from the Conflicts tab.

Note: To delete a group of events to resolve conflicts, hold down CTRL on your keyboard and select each event included in the group.

Edit New Scheduled Events

You can select a new date, time, resource, or location to resolve each conflict individually. When you attempt to resolve a conflict, you can only edit the new event you want to schedule. If the new information you select resolves the current conflict and no other conflicts are introduced, the events are created and appear on the event calendar. After you resolve a conflict, it no longer appears on the Conflicts tab.

Note: When you select a new date, time, resource, or location to resolve conflicts, you must handle them one at a time.

Edit a new scheduled event

1. From Tickets, click Program search. The Program Search screen appears.
2. Enter criteria to locate the program and click Search. In the Results grid, select a program and click Select. The program screen appears.
3. Select the Conflicts tab.
4. Each schedule conflict that exists for the program appears in the grid. The conflicts are grouped together by the scheduling run in which they were created. Select an individual conflict to resolve and click Resolve. The Resolve Conflict screen appears.
5. If you would like to change the date of the event to resolve the schedule conflict, click the calendar icon in the Date field to select a new date, or enter a new date manually.

6. If you would like to change the start and end times of an event to resolve the schedule conflict, enter a new time in the Start time field. The End time field will update automatically to the appropriate time based on the duration of the event that was established when it was originally scheduled.

7. If you would like to change the location of the event to resolve the schedule conflict, in the Location grid click the magnifying glass to search for a new location.

8. In the Supplies/Equipment resources or Staffing resources grids, you can add or remove resources for the event if necessary. Click the magnifying glass to search for a specific resource.

9. After you make changes to resolve the conflict, click Save.
   - If the conflicts are resolved and no other conflicts are introduced, the events are saved and you return to the Conflicts tab of the program record.
   - If conflicts still exist, a notification screen appears. To return to the Resolve Conflict screen where you can adjust date, times, resources, and locations again to resolve conflicts, click Cancel. Events cannot be saved until all conflicts are resolved.

10. After the conflict is resolved, it no longer appears on the Conflicts tab. Repeat this process to resolve additional conflicts.

Note: The previously scheduled event or events that your new event conflicts with appears in the Conflicts with grid at the bottom of the program record. This information is read-only, and should be used as a reference when you resolve the conflict.
Resolve Conflict Screen

The table below explains the items on the Resolve conflict screen. For more information about how to access this screen, see Edit New Scheduled Events on page 187.

<table>
<thead>
<tr>
<th>Screen Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date</td>
<td>To resolve the schedule conflict, select a new date for the conflicting event to be held.</td>
</tr>
<tr>
<td>Start time and End time</td>
<td>Select a new start and end time for the conflicting event.</td>
</tr>
<tr>
<td>Location</td>
<td>In the grid, you can click the binoculars to search for, or add a new location where the conflicting event will be held.</td>
</tr>
<tr>
<td>Resource and Quantity Needed</td>
<td>In the grid, you can click the binoculars to search for a new resource, edit the quantity needed, or delete the resource which is in conflict.</td>
</tr>
<tr>
<td>Conflicts with</td>
<td>The grid displays information for the previously scheduled event that the new event you are trying to create conflicts with. This information is read-only, and should be used as a reference when you resolve the conflict.</td>
</tr>
</tbody>
</table>

Edit Previously Scheduled Events

You can edit an event that has already been scheduled to resolve conflicts. If the new information you select resolves the current conflict and no other conflicts are created, you can then proceed to successfully schedule the new event.

Edit a previously scheduled event

1. From Tickets, click Program Search. The Program Search screen appears.
2. Enter criteria to locate the program and click Search. In the Results grid, select a program and click Select. The program screen appears.
3. Select the Conflicts tab.
4. Each schedule conflict that exists for the program appears in the grid. The conflicts are grouped together by the scheduling run in which they were created. Select a conflict to resolve. The currently scheduled event or events that are in conflict appear in the detail view at the bottom of the program page.
5. Under Conflicts with, click the event to edit. The event record appears.
6. Under Tasks, click Edit event. The Edit event screen appears.
7. Make changes to the event information as necessary to resolve conflicts. You can also edit all other event information if needed. For information about the items on this screen, see Edit Event Screen on page 192.

8. Click **Save** and you return to the event record. You are now ready to successfully schedule the new event as the conflict has been resolved.

**Warning:** After you edit the already scheduled event to resolve conflicts, the event you want to create still does not appear on the program calendar and only exists on the Conflicts tab. You must return to the Conflicts tab of the program to successfully schedule the event.

9. Return to the program record with original conflict and select the Conflicts tab. A notification icon appears to on the left to indicate which events are no longer in conflict and ready to be scheduled. In the detail view at the bottom of the program page, a message appears to indicate the selected event is no longer in conflict and is ready to be scheduled.

10. Select the event to schedule and click **Schedule**. A confirmation message appears.

**Tip:** On the Conflicts tab, you can display only events no longer in conflict. To do so, click **Filter**, select **Only show events which no longer conflict**, and click **Apply**.

11. Click **Yes**. The event is scheduled and removed from the Conflicts tab. If there are no remaining conflicts, the tab disappears and you return to the program record. If additional conflicts exist, you return to the Conflicts tab.

Manage Program Events

After you schedule program events, you can access individual event records to view and edit schedule details, event prices, resources, registration questions, notices, and sections, and sales methods assigned to the event. When an event record is open, you can also mark the event as active or inactive and refresh the screen to make sure you have the latest information.

Each individual event record displays event details at the top of the screen. These details include the date and time the event is currently scheduled, as well as the event capacity and location. Also displayed are the event description, whether the event requires registration, and the available sales methods. All sales methods displayed may not be currently valid for the selected event due to the date they are set to become active.

Access Program Event Records

After you schedule events for a program, you can access each specific event record to view and edit event details. Each event record includes the date and time the event is currently scheduled, as well as the event capacity and location. Also displayed are the event description, resources, valid sales methods, event pricing, and event holds. Before you can access an individual event record, you must first open the program record. On the program record, select the Events tab or the Calendar tab to view and open individual event records.

> **Access a program event record**

1. From **Tickets**, click **Program search**. The Program Search screen appears.
2. Enter criteria to locate the program that contains the event to access and click Search. In the Results grid, select the program and click Select. The program screen appears.

3. From the Calendar tab, locate the event on the calendar and double-click it. You can also select the Event List tab and double-click the event in the grid. The event record opens.

Edit Program Events

After you add a program and schedule program events, you can view and edit the individual event records. Each scheduled event inherits default information defined on the program. These defaults can be changed on each event record if necessary. You can edit the event name and description, location, and event capacity. You can also change the event date, resources, start time, as well as valid sales methods and on-sale time periods.

Most events you schedule will have a single location. However, if you determine that an event needs more space, you can edit the event and add multiple locations. For example, you may have a large lecture hall that is partitioned so the space can be used for two smaller lectures or one large lecture. If needed, you can edit the event to span both lecture hall locations if additional space is required.

If you edit the date, time, resources, or locations for an event you may encounter schedule conflicts with other scheduled events. If schedule conflicts occur, you cannot save the event you are editing until you change the date, time, resources, or location to alleviate the conflicts. You can also edit the previously scheduled event to clear the conflict or select Ignore conflicts. If you select Ignore conflicts, beware that you will schedule events that occur at the same time and location. Additionally, if you select Ignore conflicts to disregard conflicts and schedule events, those events do not appear on the Conflicts tab of the program record. For information, see Resolve Schedule Conflicts on page 185.

You can also edit program event prices. For information, see Assign Custom Ticket Prices to Program Events on page 193.

Edit a program event

1. On the program event record, click Edit event under Tasks. The Edit event screen appears. For information about this screen, see Edit Event Screen on page 192.
2. Make changes to the event information. You can edit the name and description, location, and event capacity. You can also change the event date, start time, and end time, as well as valid sales methods and on-sale time periods. For more information about the items on this screen, see Edit Event Screen on page 192.

3. Click Save. If no schedule conflicts exist, the event is saved. If schedule conflicts occur, you must alleviate the conflicts before you can save. To disregard the conflicts and schedule the events anyway, select Ignore conflicts.

**Warning:** If you select Ignore conflicts, you will have events that are scheduled for the same time and location. Additionally, when you select Ignore conflicts and schedule events, those events do not appear on the Conflicts tab of the program record. For information, see Resolve Schedule Conflicts on page 185.

### Edit Event Screen

The table below explains the items on the Edit event screen. For information about how to access this screen, see Edit Program Events on page 191.

<table>
<thead>
<tr>
<th>Screen Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name and Description</td>
<td>The event name and description defaults in from the program. You can change the default as needed.</td>
</tr>
<tr>
<td>Location</td>
<td>The location defaults in from the program. If there is a single default location assigned to the program, it appears along with the Event spans multiple locations link. If you determine that an event needs more space, you can click this link to add multiple locations. For example, you may have a large lecture hall that is partitioned so the space can be used for two smaller lectures or one large lecture. If needed, you can edit the event to span both lecture hall locations if additional space is required. If multiple default locations are assigned to the program, a grid displays each. You can add or remove locations as necessary.</td>
</tr>
<tr>
<td>Capacity</td>
<td>The capacity in this field comes from the default location assigned to the program. If more than one location is selected as a default, the smallest capacity appears here. If no default locations were entered on the program, this field is blank. If needed, you can change the capacity in this field to meet the needs of the event. The capacity you enter for the event determines the number of tickets that can be sold.</td>
</tr>
<tr>
<td>Screen Item</td>
<td>Description</td>
</tr>
<tr>
<td>------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Schedule</strong></td>
<td>Enter the new date, start time, or end time for the event. If you edit the date, time, or locations for an event you may encounter schedule conflicts with other previously scheduled events. If schedule conflicts occur, you cannot save the event until you change the date, time, or location to alleviate the conflicts. You can also edit the previously scheduled event to alleviate the conflict or select <strong>Ignore conflicts</strong>. If you select <strong>Ignore conflicts</strong>, will have events that are scheduled for the same time and location. Additionally, when you select <strong>Ignore conflicts</strong> to disregard conflicts and schedule events, those events do not appear on the Conflicts tab of the program record.</td>
</tr>
<tr>
<td><strong>On-sale information</strong></td>
<td>On-sale information determines valid sales methods and ticket availability. The sales methods assigned determine how and when customers can purchase tickets for the event. For example, you can configure ticket purchases made via the “Walk-up” sales method to begin 4 weeks prior to the event. However, for the “Phone” sales method, you could begin sales 6 weeks prior. To change when ticket sales begin for a specific sales method that is already assigned, edit the date and time. To make an additional sales method valid for this event, in the <strong>Sales Method</strong> column, click a blank row and select a method.</td>
</tr>
</tbody>
</table>

**Assign Custom Ticket Prices to Program Events**

Program events you schedule inherit the ticket prices defined on the associated program. If necessary, you can edit all pricing information for each event and assign custom prices. For example, you can assign different prices to an opening night program event while leaving all other program events with the standard prices. To view and manage ticket prices for a specific program event, open the event record.

**Assign custom ticket prices to a program event**

1. On the program event record, click **Assign custom prices**. The Edit prices screen appears.
2. When you first access this screen, the current prices for the event appear but not editable. To edit the prices, select **Use custom prices for this event**. The price grid is now editable and you can assign custom prices.
3. In the grid, make changes to the price types and ticket face prices as needed.
4. Click **Save**. You return to the event record and “custom” appears next to the **Prices** label to provide visual confirmation that the event uses custom ticket prices.

**Edit Pre-sale Information for Program Events Sold Online**

You can configure a members only pre-sale period for scheduled event tickets sold online. From the scheduled program record, you can define the total number of tickets available for pre-sale, when the pre-sale period begins, and which types of members are eligible to purchase tickets during this
period. For more information, see Configure a Members Only Pre-sale Period for Online Sales on page 162.

The pre-sale information you enter for a program is inherited by events added to the program. Using the Pre-Sale tab of the Edit event screen, you can update pre-sale information as needed.

Manage Program Event Resources

Supplies/equipment and staff resources default onto the program event record from the program record. However, sometimes you may want to add additional resources or edit resources for an individual event. On the program event record, you can manage the program event resources on the Resources tab. On the Resources tab, you can add, edit, and delete resources, and access resource records for more information.

To go to a resource record, click the resource in one of the grids. The resource record appears. On the resource record you can make adjustments as necessary. However, adjustments made to the resource record affect all programs and program events. For more information about resources, see the Configuration Tasks section.

Supply/Equipment Resources for Program Events

Supplies/equipment resources are items that may be needed for a program event. For example, you may offer a program that needs a projector or other electronic equipment, chairs, or information packets. When you schedule a program event, resources defined for the program automatically default onto the program event record. After you schedule an event, you can add, edit, or delete resources as necessary.

Add supply/equipment resources to a program event

1. On the program event record, select the Resources tab. For information about how to access a program event, see Access Program Event Records on page 190.

2. Next to Supplies/Equipment resources, click Add. The Add a supply/equipment resource screen appears.
3. In the **Resource** field, click the binoculars and use the Resource Search screen to find and select a resource to add to the event.

4. If you selected a per ticket resource, the per ticket quantity needed is displayed. If you did not select a per ticket resource, in the **Quantity needed** field, enter the number of resources for the event.

5. Click **Save**. You return to the program event record.

---

### Edit a supply/equipment resource for a program event

1. On the program event record, select the Resources tab. For information about how to access a program event, see [Access Program Event Records on page 190](#).

2. In the Supplies/Equipment resources grid, select a resource and click **Edit**. The Edit program resource screen appears. Edit the information as necessary.

3. In the **Resource** field, click the binoculars and use the Resource Search screen to find and select a different resource.

4. If you selected a per ticket resource, the per ticket quantity needed is displayed. If you did not select a per ticket resource, in the **Quantity needed** field, enter the number of resources for the event.

5. Click **Save**. You return to the program event record.

---

### Delete a supply/equipment resource for a program event

1. On the program event record, select the Resources tab. For information about how to access a program event, see [Access Program Event Records on page 190](#).

2. In the Supplies/Equipment resources grid, select the resource and click **Delete**. A confirmation message appears.

3. Click **Yes**. You return to the program event record and the resource no longer appears in the grid.

---

### Staff Resources for Program Events

Staff resources are people who may be needed to work or volunteer for a program event or group visit. For example, you may need an event volunteer for exhibition openings or a tour guide for large groups.

**Note:** If staff resources were automatically assigned to a program event when it was scheduled, you must access the event record, edit the staff resources, and schedule people to fill those resource positions.

---

### Add a staff resources for a program event

1. On the program event record, select the Resources tab. For information about how to access a program event, see [Access Program Event Records on page 190](#).

2. Next to **Staffing resources**, click **Add**. The Add a staffing resource screen appears.
3. In the Resource field, select the type of staff resource that is needed. For example, “Docent” or “Interpreter.”

4. In the Quantity needed field, enter how many staff you need for the event.

5. In the Filled by field, select the type of staff member who will fill this resource role, for example, “Volunteer.”

6. To assign a person as the staffing resource, under Assigned staff, search for and select the staff member. The phone number defaults from the staff member’s record.

7. Click Save. You return to the program event record.

Schedule staff resources for a program event

If staff resources were automatically assigned to a program event when it was scheduled, you must access the event record, edit the staff resources, and schedule people to fill those resource positions.

1. On the program event record, select the Resources tab. For information about how to access a program event, see Access Program Event Records on page 190.

2. In the Staffing resources grid, select a resource and click Edit. The Edit staffing resource screen appears.

3. In the Assigned staff grid, click the magnifying glass to select a person to fill the staff resource position. Repeat for each staff resource needed for the event.

4. Click Save. You return to the program event record.
Edit a staff resource for a program event

1. On the program event record, select the Resources tab. For information about how to access a program event, see Access Program Event Records on page 190.
2. In the Staffing resources grid, select a resource and click Edit. Adjust the information as necessary.
3. In the Resource field, select the type of staff resource that is needed. For example, “Docent” or “Interpreter.”
4. In the Quantity needed field, enter the number staff resources of this needed for the event.
5. In the Filled by field, select they type of staff member who will fill this resource role, for example, “Volunteer.”
6. To assign a person as the staffing resource, under Assigned staff, search for and select the staff member. The phone number defaults from the staff member’s record.
7. Click Save. You return to the program event record.

Delete a staff resource for a program event

1. On the program event record, select the Resources tab. For information about how to access a program event, see Access Program Event Records on page 190.
2. In the Staffing resources grid, select the resource and click Delete. A confirmation message appears.
3. Click Yes. You return to the program event record and the resource no longer appears in the grid.

Configure Program Event Registration Information

If you schedule an event for a program that requires registration, the Registration information tab appears on the program event record. By default, the questions, notices, and sections on this tab originate from the program. You can add, edit, delete, and mark questions, and notices active or inactive as needed. For information about how to configure the program event registration information, see Manage Program Registration Information on page 174.

On the Registration information tab of a program event, you have the option to use custom registration information. Custom registration information gives you the ability to customize a program event with different registration questions, notices, and sections.

When you use custom registration information the registration questions, notices, and sections are no longer linked to the program. So any questions added to the program event are not added to the program and any questions added to the program are not added to the program event. However, if you add a new question it is added to the Manage Registration Forms page and can be added for use to other programs. Also, if you edit an existing question, the question is updated for the program.

To customize registration questions, notices, and sections for a program event, click Use custom registration information on its record.
However, if at a later time you decide you want to use the program’s registration information, from the Program Event page, on the Registration information tab, click **Use program registration information**.

**Note:** If you decide to use program registration information after you added custom registration information, all custom registration questions, notices, and sections are removed.

**Add or Edit a Registration Question**

1. On the Registration Information tab, under **Registration information**, click **Add, Question**. The **Add a question** screen appears.
2. To edit a question, select the row, and click **Edit** and make changes as necessary.
3. In **Registration section**, select or enter a section. A section refers to where it appears on a registration form.
4. In **Registration question**, select or click the **New icon**, to add a new registration question. If you click the **New icon**, the **Add a question** screen appears. For information about this screen, see **Add or edit registration questions on page 60**.
5. If the question requires a response, select **Required**.
6. To add your question, click **Save**. The question appears under **Registration Information** in the section you added.

**Add or Edit a Registration Notice/Disclaimer**

1. On the Registration Information tab, under **Registration information**, click **Add, Notice/disclaimer**. The **Add a Notice/disclaimer** screen appears.
2. To edit a notice/disclaimer, select the row, and click **Edit** and make changes as necessary.
3. In **Registration section**, select or enter a section. A section refers to where it appears on a registration form.
4. In **Registration question**, select or click the **New icon**, to add a new registration notice/disclaimer. If you click the **New icon**, the **Add a notice/disclaimer** screen appears. For information about this screen, see **Add or edit registration notice/disclaimer on page 60**.
5. To add your notice/disclaimer, click **Save**. The question appears under **Registration Information** in the section you added.

**Create Event Description for Web Forms**

On the Web Forms tab of the program event record, you can edit the program description that appears on web forms. Program events inherit descriptions from programs, but you can edit the descriptions to tailor them to particular events. For example, you can highlight information about specific events or remove program information that does not apply. When you create a web form in **Web** to sell online tickets for the event, the description appears on the web form.
Customize event description to display on web form

1. On the program event record, select the Web Forms tab.
2. Click Edit. The Edit event description for web forms screen appears.
3. To edit the program description, select **Use a custom web description for this event.** In the editor, enter the description. When you create a web form in Web for this event, the description appears on the web form.

**Note:** You enter the program description on the program record. For information, see Create Program Description for Web Forms on page 175.
4. Click Save. You return to the program event record.

Copy Program Events

After you schedule program events, you can copy them to quickly schedule new events. There are multiple ways to copy events. You can copy a specific individual event or you can copy a specific day or week of events. Copied events retain the location, resources, site, capacity, price list, and registration information defined on the event being copied. You just select new dates and times and then edit the new events as needed.

- Copy Individual Program Events on page 199
- Copy a Day of Program Events on page 200
- Copy a Week of Program Events on page 201

Copy Individual Program Events

To save time, you can copy an individual event that already exists instead of scheduling an entirely new event. A copied event retains the name, description, location, capacity, prices, and registration information defined on the event being copied. You just select the new dates and times and then edit the new events as needed.

**Copy an individual program event**

1. On the program event record, click **Copy event** under Tasks. The Copy event screen appears. For information about how to access a program event record, see Access Program Event Records on page 190.
2. In the **Occurs** field, select how often the new events occur and enter the associated recurrence parameters. The event can happen once or it can recur on a daily, weekly, or monthly basis. Different day, date, and time configuration options appear depending on your selection in this field.

   For example, to copy an event and create new events that occur on a monthly basis, in the **Occurs** field select **Monthly.** You then select the specific day that the event occurs and the number of months that pass between each recurrence.
3. In the From and To fields, enter the date range for the new events. For a single day event, enter the same date in both fields.

**Note:** The Currently Scheduled field displays the number of events for the settings you select. The number of events changes based on the recurrence settings.

4. Click Save. The events are created, and the Program Calendar appears with the new events. You can now edit the events as necessary. For more information about how to work with events on the Program Calendar, see View the Program Calendar on page 178.

**Copy a Day of Program Events**

To save time, you can copy a day of program events instead of scheduling entirely new events. During this process, you have the flexibility to copy multiple events from different programs at once. When you select a day of events to copy, you can further define the events on the selected day that are actually copied.

A copied event retains the name, description, location, capacity, prices, and registration questions, notices, and sections defined on the event being copied. You just select the new dates and times and then edit the new events as needed.

**Copy a day of program events**

1. From Tickets, click Program Calendar. The Program Calendar appears.

2. On the calendar, select the day of events to copy. To select a day, you must click an event on the calendar day.

3. Click Copy, Day. The Copy day screen appears.
4. Under **Copy from**, the event grid lists each event on the selected day. By default, all events are selected. If you do not want to copy an event from that day, clear its checkbox.

5. Under **Copy to**, in the **Occurs** field, select how often the copied events will occur and enter the associated recurrence parameters. The event can happen once or it can recur on a daily, weekly, or monthly basis. Different day, date, and time configuration options appear depending on your selection in this field.

   For example, to copy events on a day and create new events that occur on a monthly basis, in the **Occurs** field select **Monthly**. You then select the specific day that the event occurs and the number of months that pass between each recurrence.

   ![Copy day](image)

6. In the **From** and **To** fields, enter the date range for the new events. For a single day event, enter the same date in both fields.

   **Note:** The **Currently Scheduled** field displays the number of events for the settings you select. The number of events changes based on the recurrence settings.

7. Click **Save**. The events are created and the Program Calendar appears with the new events. You can now edit the events as necessary. For more information about working with events on the Program Calendar, see View the Program Calendar on page 178.

**Copy a Week of Program Events**

To save time, you can copy a week of program events instead of scheduling entirely new events. When you select a week to copy, you have the flexibility to select specific days and events within the week. For example, instead of copying all seven days of the selected week, you can copy only the events that occur on Monday, Tuesday, and Wednesday.

A copied event retains the name, description, location, capacity, prices, and registration information defined on the event being copied. You just select the new dates and times and then edit the new events as needed.

> **Copy a week of program events**

1. From **Tickets**, click **Program Calendar**. The Program Calendar appears.

2. On the calendar, select the week of events to copy. To select a week, click an event that is within that week.

3. Click **Copy, Week**. The Copy week screen appears.

4. The grid at the top of the screen lists the days within the selected week. In the **Copy** column, clear the checkboxes for the days you do not want to copy.
5. Under **Select the events within the selected days to copy**, the grid displays all events scheduled for the week you selected. This grid allows you to designate specific events to copy for each day. In the grid, clear the checkboxes for the events you do not want to copy.

   In the **Day** field, you can select a day to clear checkboxes for events or you can choose to edit the events to copy for All selected days.

6. Under **Copy to**, in the **From** and **To** fields, select the dates for the week to copy events to.

   **Note:** The **Currently Scheduled** field displays the number of events for the settings you select. The number of events changes based on the recurrence settings.

7. Click **Save**. The events are created and the Program Calendar appears with the new events. You can now edit the events as needed. For more information about working with events on the Program Calendar, see View the Program Calendar on page 178.

### View the Program Event Calendar

On a scheduled program record, select the Calendar tab to view all events currently scheduled for that program in a helpful calendar format. You can view the program event calendar by month, week, or day. You can also use the **Jump to date** field to quickly select a future date.

By default, past events do not appear on the calendar. However, you can display past events on the calendar. Under the **Program events** filter, select **Include past events** and click **Apply filter**.

To open a program event record from the calendar, locate the event and click the link to the event. The event record opens.

For efficiency, you can schedule events directly from the Calendar tab. To schedule events from the Calendar tab, click **Add**. The Schedule screen appears. For information about the options on this screen, see Schedule Program Events on page 180.

For efficiency, you can schedule events directly from the Calendar. To schedule events from the Calendar, click **Add**. The Schedule screen appears. For information about the options on this screen, see Schedule Program Events on page 180.

   **Tip:** To quickly add an event for a specific date, on the calendar, double-click a day or right-click a day and select **Add**. The Schedule screen appears with the date you selected already entered.

### View the Program Event List

On a scheduled program record, select the Event List tab to view a list of all events currently scheduled for that program. The list is customizable. You can add and remove columns and choose how they filter and sort.

From this tab, you can open a specific event record and edit the event or delete it as needed. To open an event record, click the event name. To edit or delete the event, click the double arrows next to the event to expand the row.

You can also quickly delete multiple events from the list at one time. Filter the list to display only the events you want to delete, or mark the checkbox for each event row to delete. Select the checkbox
under the **Search** field and click **Delete**. A notification appears with the number of records that were successfully deleted.

**Note:** The program will not delete events with sold or reserved tickets.

![Delete Event Screen]

For efficiency, you can also schedule program events directly from the Event List tab. To schedule events from the Event List tab, click **Add**. The Schedule screen appears. For information about the options on this screen, see [Schedule Program Events on page 180](#).

Additionally, you can display past events on the Event List tab. To display events that have already occurred, click the **Filters** button, select **Include past events**, and click **Apply**.

### Delete Program Events

When you delete a program event, it is removed from your database. You can delete an event from the program event record or the program calendar. However, you cannot delete program events after they are involved in sales transactions.

To delete an event, access the program record that contains the event. On the Calendar tab or Event List tab, click the event name. The program event record appears. Under **Tasks**, click **Delete event**.

You can also delete an event directly from the program calendar, which you access from **Tickets**. On the Program Calendar page, select an event and click **Delete**.

### Manage Event Packages

You can create event packages to sell a series of preregistered events for a single flat rate. For example, you can schedule each day of a weeklong summer camp and group the days together into an event package. A parent can register their child to attend the weeklong camp and pay one fee for the entire session. In **Altru**, you can then view the child’s registration information across individual days within the camp, allowing you to accurately track attendance on a day-to-day basis.

When creating an event package, you can specify whether patrons can register for individual events within the package. For example, summer camp registrants may be required to attend the entire week, but you may offer a pottery class that meets every Monday for a month. You can configure the pottery class so that patrons can pay a flat rate to attend the entire month, or they can opt to sign up for individual classes on specific Mondays. To provide an incentive to buy more classes, you can define a discounted rate for patrons who purchase the entire package of pottery classes.
At this time, event packages can be sold online or through Advance Sales.

Configure Event Packages

You can configure event packages for scheduled programs that require registration.

Configure event packages

1. In Tickets, from a new or existing preregistered scheduled program, select the Event List tab.
2. Select Add.
3. On the Schedule events screen, select the recurrence and start and end dates for individual events in the package. When you select a recurrence other than Single date, the Create a package with these events checkbox appears.
4. To create the event package, select Create a package with these events. The Package Details tab appears.
5. Complete the General, Start Time Patterns, Multiple Locations, and Resources tabs as needed. These settings apply to the individual events in the package.

6. Select the Package Details tab. All settings default from the program to the package, but you can update them as needed. For example, you can enter a different name, price or capacity for your package. To avoid overselling an event, the package capacity must be less than or equal to the capacity set for your events.

7. To allow package events to be sold individually when purchased online or through daily sales, select Allow patrons to register for individual events sold online or through Daily Sales. (Patrons can always register for individual events in Advance Sales regardless of this setting.). For example, you may want to sell discounted packages but allow patrons to register...
for individual events at full price.

If you leave this option unmarked, patrons can only register for package events individually through advance sales.

8. Click **Save**. You return to the Event List tab and the new package appears in the list.

**Events List tab**

On the Event List tab, you can view and manage all packages and individual events available for the program. You can also group existing events into a new package.
To group existing events into a new package, select the checkbox for each independent event and then select Create a package. On the create a package screen, enter all relevant details for the package. When finished, click Save.

To edit, delete, or remove an event from the package, select the event in the list and click Edit, Delete, or Remove from package. When you remove an event from a package, it remains on the program as an individual event.

To delete or remove multiple events from the package at one time, select the checkbox for each event and then select Delete or Remove from package.

To add an individual event to an existing package, select the event and then select Add to
existing package.

- To edit or delete a package, select the package and click **Edit** or **Delete**.

**Note:** Once a package is sold, you cannot edit or delete it, or remove its events.

## Manage Event Packages

To open a package record from the Event List tab, select its name in the list. On the package record, you can view details including the capacity, on-sale information, and whether its events can be sold individually. On the tabs, you can:

- Edit package prices.
- Enter custom registrant information. For example, you can enter questions that pertain to the entire package rather than individual events. If you allow package events to be sold individually online, you can enter custom registration information on the event records.
- View the current registrants for the package and individual package events.
- Enter a custom web form description. By default, event package web forms display the description set for the program, but you can enter a custom description for the package. Individual events in the package display the program’s description, but you can also enter custom descriptions on the event records.

To edit a package, under **Tasks**, select **Edit event package**. You can change all the settings that defaulted from the program, such as on-sale information and membership restrictions. For example, if a package isn't selling well, you might want to change the setting to allow package events to be sold individually. Or you can edit the pre-sale information to make packages available for pre-sale before individual events.

To view a roster of current registrants, under **Tasks**, select **View master roster**. Use the Package recipient column to determine whether the registrant purchased the full package or individual events in the package. This list only includes registration information — to view attendance, use each individual event's roster.

## Edit an Event Package

You can edit settings for an existing event package whenever updates are needed. For example, you can rename the event package or edit package pricing. If a package isn't selling well, you might want to change the setting to allow package events to be sold individually.

### Edit an event package

1. From the Event List tab, select the package's name in the list.
2. From the package's record, under **Tasks** select **Edit event package**.
3. Under the General tab, edit the general settings for the event package.
   - Edit the package **Name** and **Description** as needed.
   - To adjust the number of package registrations that can be sold, edit the **Capacity**.
• To manage whether package events can be sold individually, select or deselect Allow patrons to register for individual events sold online or through Daily Sales. (Patrons can always register for individual events in Advance Sales regardless of this setting.) If you leave this option unmarked, patrons can only register for package events individually through advance sales.
• To adjust package pricing, edit the price types and package prices under Package pricing.
• To adjust the on-sale time for the event package, edit the dates and times for the applicable sales methods under On-sale information.
• To make a package available to members only, edit the settings under Restrict package sales to these memberships.

4. Under the Pre-sale tab, make any necessary changes to the pre-sale settings for the event package.
5. Click Save.

Sell Event Packages
Package sales are similar to individual event sales, with some exceptions.

Advance Sales
From the Create order tab in Advance Sales, enter a date range to view packages with events during that period. Each package event appears after the parent package name. Events that haven’t gone on sale yet still appear in the list but are disabled. You can add the entire package to the order or individual events from the package.

Online Sales
Packages can be sold online once web forms have been configured. To configure event package forms, go to Web and click Manage event package forms. Under Manage Event Package Forms, the list displays your organization’s preregistered programs with event packages and their associated events.

From this area you can complete several tasks. You can:
• Open and edit program, package, or event records.
• Edit the default acknowledgment emails or the descriptions that appear on the form.
• Edit the design and language options on the package. If the program allows online sales for individual events, you can also update options for events.

Note: If Allow patrons to register for individual events sold online or through Daily Sales is selected on a package, you’ll need to approve each individual event you want to sell on the website.

Daily Sales
At this time, packages cannot be sold through daily sales. However, if Allow patrons to register for individual events sold online or through Daily Sales is marked for a package, you can sell individual events from a package in daily sales.

Discounts
You can configure certain discounts to apply to event packages. For information about creating and managing discounts, see Discounts and Promotions on page 61.

- **Per-item**
  You can create standard, per-item discounts for packages.
  To make an item-level discount available for packages, on the General tab of the discount, select **Applies to event packages**, then select the price type and value/percentage. On the Programs tab, choose which programs the discount applies to.
  For performance reasons, item-level discounts cannot be configured to apply to both individual event tickets and packages. If you offer the same discount for both types of events (for example, a 10% member discount), create two separate discounts.
  On the Discounts tab of the program record, there is a new **Item type** column which displays whether the discount applies to tickets or event packages.

- **Per-order**
  You can configure order-level discounts to apply to packages.
  For discounts that calculate a specific amount off, the discount will apply to packages automatically.
  For discounts that calculate a percentage off, configure the discount to apply to packages. To make a percent-off discount available for packages, on the General tab of the discount, select **Applies to event packages**.

**Sales Orders**
When a patron purchases a package, the total amount paid for the package is split between each event. For example, if they pay $100 for the package of 5 classes, the order will show each class with a payment of $20.

**Refunds**
You can issue a full refund for a purchased package. At this time, you cannot issue partial refunds for a package or for individual events in the package.

**Reschedule Packages**
You can reschedule a package registration for another event package of the same program and price type. When you reschedule a package registration, any price difference is ignored. If you need to refund the price difference, or charge an additional amount, process a refund and purchase the package for the new date and time instead.
To access the Reschedule Tickets page, from Sales, under Manage orders, click Reschedule tickets.
**Program Reports**

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From *Tickets*, you can generate a number of reports that provide valuable information. There reports can help provide details about active memberships, programs and scheduled events, expected reservations for the day, unscheduled event conflicts, and unmapped general ledger items.

### Daily Reservation Report

The Daily Reservation Report provides information about each group visiting your organization on a particular day. The information provided includes the group reservation name, number of visitors, arrival time, contact information, number of buses, security deposit information, and any notes entered on the reservation. Typically, you run this report at the beginning of the day to make sure you have adequate staffing available for each group when they arrive. To view this report, from *Tickets*, click **Daily reservation report** under **Reports**. The Daily Reservation Report appears.

```
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<th>Reservation name</th>
<th>Visitors</th>
<th>Arrival time</th>
<th>Contact name</th>
<th>Contact number</th>
<th>Buses</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Thu 12/3/2009</td>
<td>ABC Learning Center - Sprague</td>
<td>42</td>
<td>9:00am</td>
<td>Beverly Sprague</td>
<td>(901) 155-3519</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Abrams</td>
<td>7</td>
<td>10:00am</td>
<td>Geoffrey Abrams</td>
<td></td>
<td>0</td>
<td></td>
</tr>
<tr>
<td></td>
<td>AAA Concrete - Schultz</td>
<td>20</td>
<td>11:30am</td>
<td>Martin A. Schultz</td>
<td>(808) 877-1486</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>Fri 12/4/2009</td>
<td>Griffin</td>
<td>25</td>
<td>8:00am</td>
<td>Brian Griffin</td>
<td></td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>Tue 12/11/2009</td>
<td>Parcelis</td>
<td>20</td>
<td>8:00am</td>
<td>Bill Parcelis</td>
<td>(214) 455-8888</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>Wed 12/13/2009</td>
<td>AAA Concrete - Schultz</td>
<td>23</td>
<td>9:30am</td>
<td>Martin A. Schultz</td>
<td>(808) 877-1486</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>Fri 12/11/2009</td>
<td>Parcelis</td>
<td>20</td>
<td>8:00am</td>
<td>Bill Parcelis</td>
<td>(214) 455-8888</td>
<td>2</td>
<td></td>
</tr>
</tbody>
</table>
```
You can filter the results by date. After you select the filters you want, to view the report, click View Report. The report display the reservation name, total number of visitors, arrival time, and contact name and number.

Daily Schedule Report

The Daily Schedule report provides a view of all events scheduled to occur on a specific day. You can run the report for all programs or a single specific program. As part of your daily workflow, you may want to print this report so you have a portable schedule of the day's events. To view this report, from Tickets, click Daily schedule under Reports. The Daily Schedule page appears.

By default, all program events scheduled for the current day are displayed. To view future events, select a different date in the Date field. You can also view only the events for a specific program by making a selection in the Program field. If you select a new date or program, click Refresh to display updated event data.

Unmapped General Ledger Items Report

The Unmapped General Ledger Items Report is used to view any sales items not mapped to a general ledger (GL) account. Items not mapped to a GL account can not be sold. To access the report, from Tickets, under Reports, click Unmapped General Ledger Items Report the Unmapped General Ledger Items Report page appears.
The report displays all the items not mapped to a GL account, sorted by office and item. Because you cannot create unmapped transactions, this report is a helpful tool you can use to identify the transaction mappings you need to address.

Unscheduled Events Conflict Report

From Tickets, under Reports, you can access the unscheduled events conflict report. The unscheduled events conflict report displays information about conflicts such as location, resource, or staffing conflicts that need to be resolved before you can schedule the event. You can use this report as a tool to help you understand and fix event conflicts.

Note: This report shows only active event conflicts that have not been disregarded or ignored. If you schedule an event and ignore or disregard any conflicts, those conflicts are not included in this report.

You can filter the report by program, date, and conflict type. After you select the filters, click View Report to view the names of the unscheduled events, the date and time of the conflicts, the conflict types, and the names of the events which conflicts with the unscheduled events.
<table>
<thead>
<tr>
<th>Event</th>
<th>Date</th>
<th>Time</th>
<th>Location</th>
<th>Conflict type</th>
<th>Conflicts with</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sea Turtles 3-D</td>
<td>12/15/2003</td>
<td>8:00pm</td>
<td>IMAX Theater</td>
<td>Animals in the Wild - 7pm</td>
<td></td>
</tr>
<tr>
<td></td>
<td>12/24/2003</td>
<td>8:30pm</td>
<td>IMAX Theater</td>
<td>Animals in the Wild - 7pm</td>
<td></td>
</tr>
<tr>
<td></td>
<td>12/16/2003</td>
<td>11:00pm</td>
<td>Staff - 5 Decents</td>
<td></td>
<td>Sharks 3-D - 11pm</td>
</tr>
<tr>
<td>Sharks 3-D</td>
<td>12/15/2003</td>
<td>11:00pm</td>
<td>Supplies - 2 Projectors</td>
<td></td>
<td>Sea Turtles 3-D - 11pm</td>
</tr>
</tbody>
</table>