

One Week Prior Checklist

Prepare the Box Office for Closure

Once your database is sent to AMS for conversion, you will no longer be able to enter ticket sales, donations, or data of any kind. You may use it for reference, but not data entry. If your Box Office is required to be open during this time, please contact Arts Management System's Marketing and Sales Department for further instructions about what you will need to do.

Send your database(s) to Arts Management Systems to start converting

Complete your End of Day in your current software application(s) and send the information to Arts Management you require to be imported into Theatre Manager. The actual date the data is required to be sent, will be provided to you by Arts Management.

Information to Prepare for Day 1 of Training

- Administrator user id and password for the server and workstation(s)
- Chart of Accounts (a list of the General Ledger accounts) used to maintain money received from patrons, revenues for events, gift certificates, donations, memberships, tax accounts, etc. ready and available for training
- Fiscal Year Starting Month
- Venue Maps of the venue(s) (for reserved seat sales) indicating the various sections, rows, and seats numbering patterns. Please ensure that this map is accurate to the actual physical seats in the venue. If you are unsure, please walk to the venue(s) prior to the trainer's arrival.
- Brochures (these inform us of pricing options for single and season tickets)
- Organizational Chart
- Evening contact phone numbers (for data verification questions)
- Credit Card Merchant Account Setup Information
- Examples of Gift Certificates that you provide patrons
- Samples of existing ticket(s) that you are currently providing to the patrons. This will assist in designing the new ticket layout, which Theatre Manager will be printing.
- Samples of existing reports that you are currently use for event balancing and revenue accounting. These reports will be useful in determining which of the many reports in Theatre Manager are comparable to those you already work with.
- A pricing chart of the venue(s) indicating the various price levels based on where the patron sits, "scaled" or "tiered" houses. (if applicable)
- A pricing chart for the various ticket prices, including season packages the patron may purchase.
- A list of the various sales promotions used for discounting when selling tickets.
- A list of the upcoming events (dates and times) and the prices charged to the patrons for each event.
- Sample donation thank-you letter, donation solicitation request, pledge payment reminders that you would provide to a donor
- Sample marketing letters that you would provide to a patron