2013-2014 Partial Subscription UPGRADE Procedures

(in-house continuing employees)

How to UPGRADE subscribers with Partial Subscriptions to a Full Subscription for 2014-15

> ➢ *This in-house document is for <u>continuing employees only</u>. It provides information about changes resulting from the recent software release. These are Not the instructions for training New Employees.*

Overview

All patrons that currently hold Partial Subscriptions have had a **13 Subscriber Partial** membership attached to their accounts. IT appears in the **Membership Level** field.
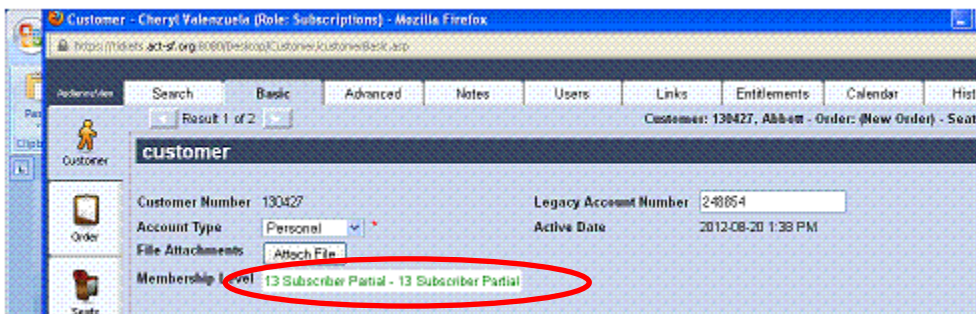
The membership allows access to the **7 Play Renewal Packages** (as well as the 4, 5, and 6 play Partial Subscriptions), for next season. If you find current subscription accounts without this information in the **Membership Level** field, notify the subscriptions manager.

How to process a Partial Subscription to Full Season UPGRADE

1. SEARCH and pull up the patron in the **Customer** screen. You should see **13 Subscriber Partial Benefits** listed in the **Customer Benefits** field.
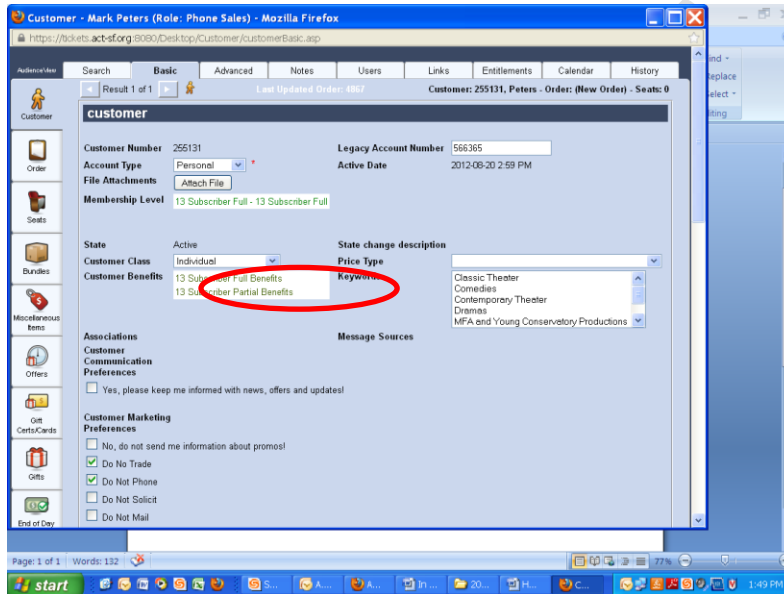

2. **CLICK** the NEW ORDER button at the bottom of the **Customer screen**. This will take you to the **Order Summary** page.

3. **CLICK** on the BUNDLE tab on the left side-bar menu.

4. Choose **14 7 Play Full NEW** from the bundles list and **CLICK** the SEARCH button. This will bring you to a selection screen where the only items you can purchase appear in green text.
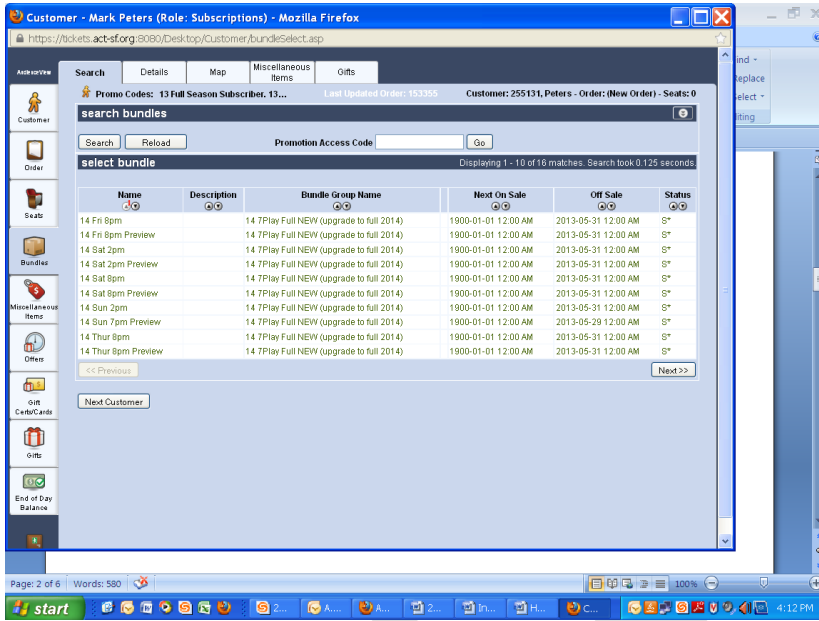
5. **CLICK** a day of the week and curtain time from the NAME column. This will open a BUNDLE DETAILS screen.

- Under **Best Available/Requests** locate the **Price Zone** menu.

- Highlight the **Seating Section** the patron requests.

- Locate the correct **Price Types Per Bundle** list (only the first three items are available). Then **Enter** the number of seats into the corresponding field to the right. (The price types are: **SUB** for regular subscription, **STC** for educator, or **SST** for Student.)
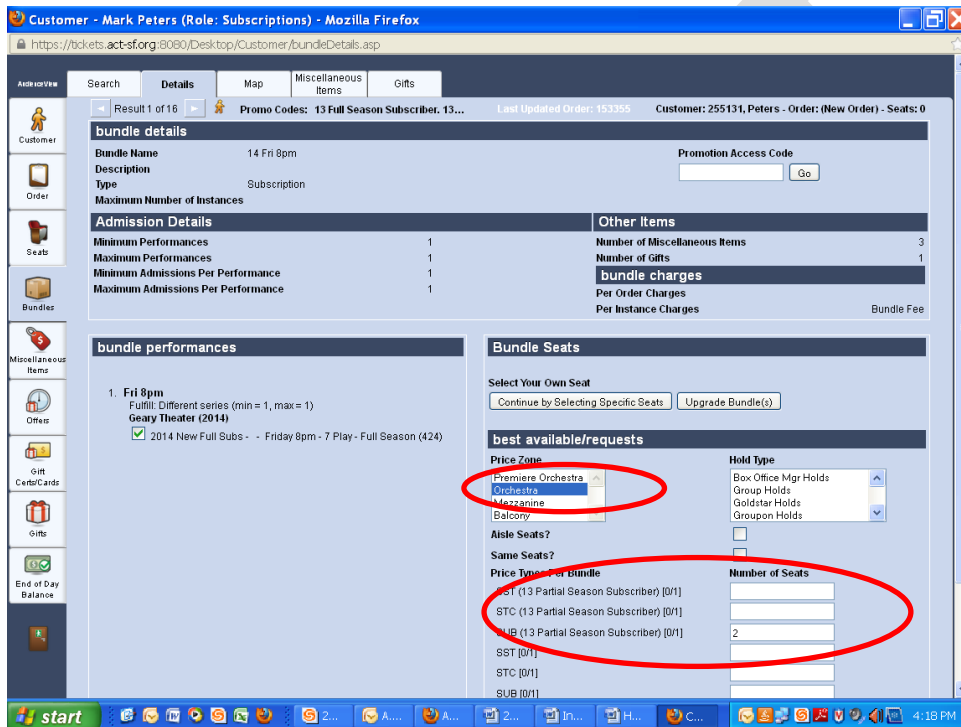
6. **CLICK** the CONTINUE button.

   This will take us to the **Bundle Details** screen.

   There we can add **Words on Plays** and **Parking** vouchers. To add one of those items:

   - CLICK in the box next to the item and ENTER the number of items ordered into the Quantity field.

   - CLICK on the CONTINUE button.

   If the patron does not want **Words on Plays** or **Parking** vouchers, don't make any entries and just **CLICK** the CONTINUE button.