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.

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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.

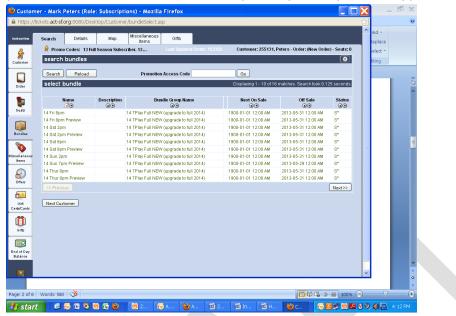
How to process a Partial Subscription to Full Season UPGRADE

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

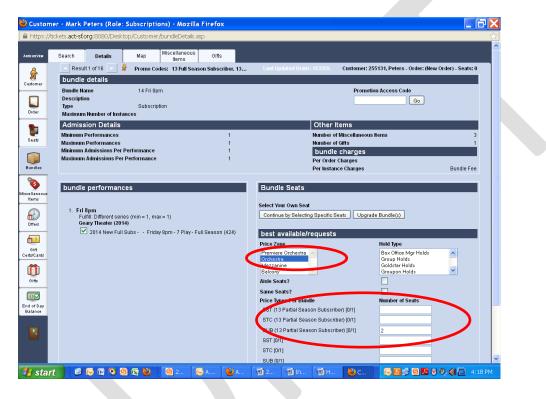
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- 2. **CLICK** the NEW ORDER button at the bottom of the **Customer screen**. This will take you to the **Order Summary** page.
- 3. **CLICK** on the BUNDLE tab on the left side-bar menu.

4. Choose <u>**14 7 Play Full NEW</u>** 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.</u>



- 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.

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