PatronBase®

Update Release Notes – Q2 2015

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Not Just Ticketing

PatronBase has always focused on not simply printing tickets, but helping you to build stronger relationships with your patrons. Our latest release gets the most out of your touchpoints with your customers, both within and outside of the box office.

- **Patron Attributes** adds Culture Segments from Morris Hargreaves McIntyre into your patron's personal record, integrated with the MHM Golden Questions survey.
- **QuickPOS** is a great product for point of sale, featuring touch-screen support and barcode scanner integration. Easily associate a sale with a patron, by name or by scanning a membership card.
- **Inventory** enhances Administration to manage your stock levels and stock points, and facilitates capturing more information about your patrons during transactions.
- **WebHub** provides a home screen for essential point-of-sale tools, along with team collaboration features, on any operating system or device.
- **Venue Manager** now supports booking resources and multiple-room bookings.
- **Memberships** has been modified so an operator can manage multiple member groups, and membership periods are flexible and specific.
- **Quick Sales** is Fast Tickets on fast forward. Sell tickets to a pre-defined cash or card payment type with as few as two clicks.

Patron Attributes & Culture Segment Support

Patron Attributes provides support for Culture Segments, the new international standard for patron segmentation in the arts and culture marketspace, defined by Morris Hargreaves McIntyre. By classifying your patrons using the Golden Questions survey from MHM, you can engage with your patrons more personally and build better relationships with them. The MHM survey tool interfaces with PatronBase, and the outcome of the survey is entered automatically into the patron's record.

For even more versatility, **Patron Attributes** supports customisation, allowing you to create any number of other patron attributes you would like to collect. Select options from lists, tick checkboxes, enter dates or numbers, or enter free-form text.

Patron Attributes can then be accessed in **Marketing**. [Filter using these new patron attributes](#) to select specific segments of your patron community and provide them with customised communications that personalise your connection with them.

QuickPOS

A point-of-sale terminal needs to be quick and easy to use. **QuickPOS** uses a touch-screen and scanner to make product selection easy. Patrons can quickly be associated with a sale by scanning a membership card or searching using name, phone number, or email address. Returns can also be processed. New staff can use **QuickPOS** with minimal or even no training.

Products are represented by large, easy-to-tap tiles. Products can be organised into logical product categories. Product variations can be multi-layered, for example presenting both size and colour options. Tickets can also be sold (GA only at this time).

A cart lists items scanned or selected. Quantities can be increased or decreased with a tap.

QuickPOS integrates with the new **Inventory** feature in **Administration** and all sales can also be seen in **Box Office**.
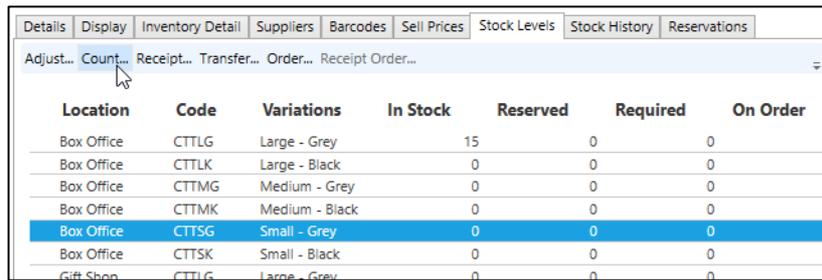
If you would like to learn more about **QuickPOS**, check out the [online guide](#).

Inventory

Manage stock levels with **Inventory**. Additionally, with improved **Inventory** capabilities, patrons can be associated with sales, so you can collect better information about your patrons' purchases.

Detail product variations. Specify stock point locations. Identify suppliers, with multiple potential suppliers for any product. Record the receipt of goods. Manage returns. Transfer products between storage facilities and retail shops. Simplify stock management by specifying reorder points, safety stock, and typical order lead times. **Inventory** even deals with stocking and selling products in

different units, such as wine stocked by the bottle and sold by the glass. It supports price differences at different sales locations. **Inventory** maintains a current stock valuation using a weighted average, catering to cost price fluctuations.


Inventory integrates with **QuickPOS** and **Box Office**. To make use of **Inventory**, talk to your PatronBase sales agent to get a license for this option.

The online help for **Inventory** will help you get started with this new capability.

WebHub

Touchscreen point-of-sale terminals benefit from having a simple home screen that puts all needed tools a finger-touch away. **WebHub** combines the key PatronBase tools needed in the box office, and packages them with useful team collaboration tools. Making this tool available in your browser means you can use any computer, including Macs, and tablets, including iPad and Android devices. Casual access means tasks can be assigned to additional staff, such as helping with a rush of walk-up ticket sales before the start of a performance. Patron information can be updated even when you are out and about, maybe while you have a meeting with a sponsor.
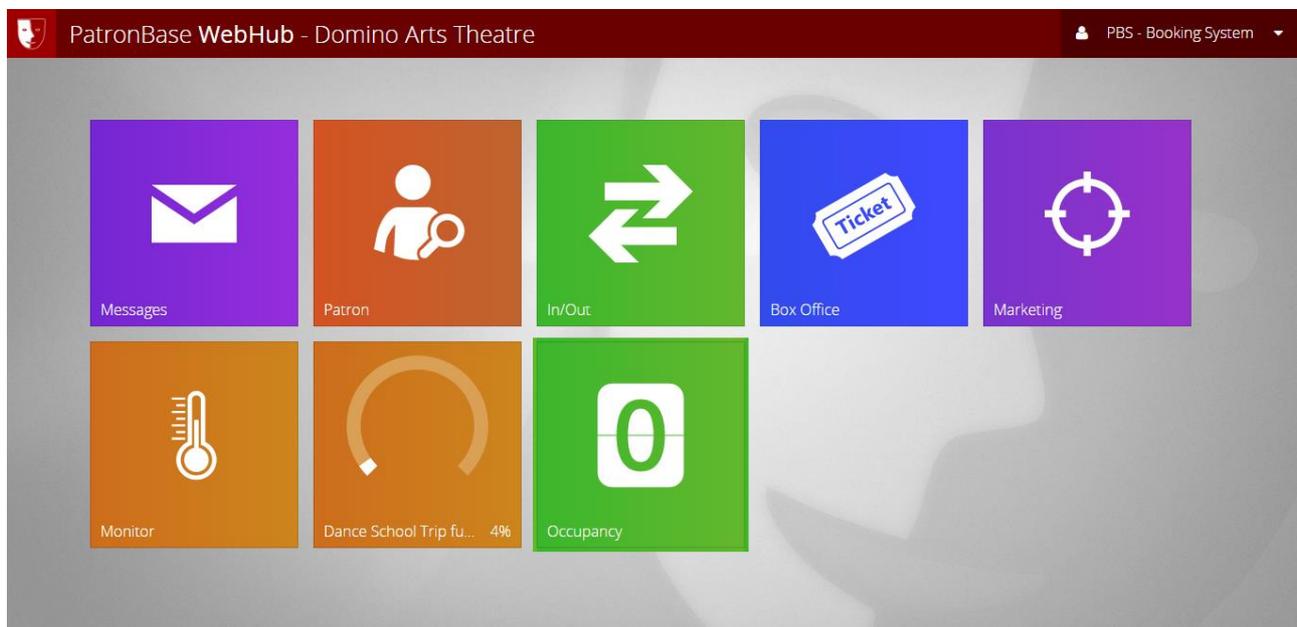
To learn about **WebHub** and the new tools it provides, check out the online guide.

Memberships

Multiple member groups can now be managed by one operator. Previously an operator may have needed several logins as each was specific to a membership group. Logging out and back in again with a different identity was awkward when managing a group for *Friends of the Theatre*, another

for *Comedy Club*, another for *Philharmonia Supporters*, and more besides. Now an operator can manage all these groups and more, and each operator requires only a single login identity.

Membership classes can include group memberships. Family memberships may have been offered earlier, but now these can be specifically identified as multiple-patron membership groups, and each patron can be associated with the membership subscription.

Membership periods are flexible and specific. Select a period of any number of days, weeks, months, or years. Choose to have memberships share the same due date, or the membership period can start from the date of purchase. Life memberships are also catered for.

Setting up memberships has been streamlined. In **Administration > Setup** you will find a **Members** menu item, and here you can set up groups, categories, and volunteer roles, without switching between application modules. Plus, you now associate a membership with a product when you set it up, so the operator no longer needs to select the correct fee when selling memberships in Box Office.

Marketing

PatronBase **Marketing** module has always equipped you to convert data you have collected on your patrons into useful information that can be used to target marketing information well.

Refine your queries with new filters added to **Marketing**. The **Patron Gender** filter not only allows selection of either male or female patrons, but also can distinguish between people and companies. For people, it further allows selection by date of birth range or year of birth. To search for patrons using MHM Culture Segments, use the new **Patron Attributes** filter. You can also use this to find patrons using any other custom attribute you have added to the system. The **Production** filter has been enhanced to support **Production Attributes**. You can pull out information by specifying attributes such as Department, Project, Account code, Playwright, and even Tags.

Use these new capabilities to gather knowledge about your patrons, customize your communications with them to best reflect them as the audience, and personalise your connection with them.

The online guide has been updated for **Marketing**.

Venue Manager

Venue Manager has been enhanced to better assist in the booking and management of resources.

A single booking can now reserve more than one room. This simplifies managing bookings for customers hiring multiple rooms for the same event.

Resources can be allocated to a booking, and charges for these resources will be added when billing. Resources allocated to one booking cannot also be reserved for another booking if the booking times overlap. Never again accidentally double-book the AV system!

Attach tags to bookings and see the tag codes in the calendar view.

Quick Sales

Quick Sales are as quick as two clicks. Sell tickets to a pre-defined cash or card payment type, print the tickets with minimal operator effort. This is ideal for cinemas, or when there is a huge queue for the box office just before a performance. If there is time, using **Quick Sales** doesn't preclude the option of adding patron details to the sale.

Other Enhancements

Box Office Performance Graphic Seating Plan Scaling

Earlier versions of **Box Office** automatically scaled the display so the seating area filled the available screen space. You can now customise the size of the seating area by adjusting the scaling control in the top right corner of the **Performance Graphic** screen. You can make the change a temporary adjustment, or you can save the setting.

Automatic/Manual Patron Search Settings

Some PatronBase systems have such a large number of patrons in the database that the automatic search for patrons as you type in their details can be too slow. The new **PatronLookupAuto** system property can leave this on or turn it off, providing a manual search button instead.

PatronLookupTextThreshold is a new system property that gives you control over the number of characters required to trigger the automatic search. The default value is three. If you type the surname of *Dennis Xi* into the **Bus/Last Name** field in the **Find** window with the default value set,

nothing happens because the name is too short to trigger the search. Use **PatronLookupTextThreshold** to adjust this behaviour.

Postcode Filtering Threshold

The new system property **PatronLookupPostcodeThreshold** lets you set the number of characters required in the **Post Code** field before the automatic search is triggered. By default the number of characters required is one, but when you have a lot of post codes that start with the same number or letter, this results in almost the entire record set being returned when you type that one character. In that situation the search will be slow, and will not return a useful list, as there won't be enough to differentiate between patrons in the database. Increasing the number of characters required before the automatic search is triggered will make the search more responsive and provide more useful search results.

Gift Aid (UK)

Another system property can turn **Gift Aid** features on and off. When activated, it prompts the operator to ask for a gift aid declaration, which is recorded against their patron record when they make donations through the box office. Additionally, the **GiftAidConfirmationMonths** system property controls the reminder period for when Gift Aid declarations need to be renewed or checked.

Scanner Configuration

Box Office features a new way to detect scanners that have been attached to the sales terminal, making it easier to use scanners in **Box Office**. For more information, see the online guide.

Remote Support Assistance

To provide you with improved support assistance, a new feature sets up a remote screen-sharing connection with PatronBase support. In the **PatronBase** menu on all desktop modules is a new **Host Support Session** menu item.
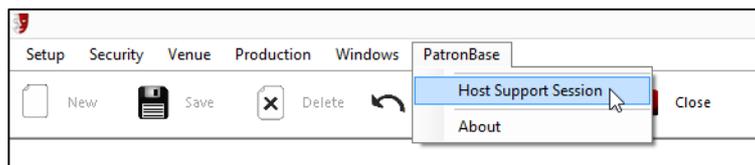
This will start a TeamViewer session. Tell your PatronBase support agent **Your ID** and the one-time session **Password** and not only will you be able to demonstrate a problem, but the support agent will be able to take over and control your computer, just as if you had them sitting next to you. This won't give the agent permanent access to your computer. It will only work for that one assistance session; a new session password will be generated and required for future support calls.

Revisions

You can find the revisions list at guides.patronbase.com/Content/Revisions/Revisions.htm.