TM4

Theatre Manager Northeast Regional Users Conference
SCHEDULE OF EVENTS

TOPIC TRACKS

Datahead – getting information in and out of TM

Ditch the Spreadsheets – the many facets of the facilities management module

Form Letters Take Flight – all things form letters, emails and eblasts

Show Me Da Money – all things donations and membership

Tix to the Moon – all things events & tickets

To TM & Beyond – using TM's data in other tools/software

Web Me Baby – the tech behind the patron webstore experience

SESSION FORMATS

Roundtable Format

Presentation Format

SESSION LEVELS

B Beginner (no experience needed)

I Intermediate (some experience helpful)

A Advanced (comfort recommended)

MONDAY Sep 21, 2020

Time	Session	Location
8:30 am – 9:30 am	**Registration and Continental Breakfast**	Fenimore Gallery
9:30 am – 10:30 am	**KEYNOTE: ARTSMAN'S FEATURE UPDATES SINCE TM3** (Presentation, B) Artsman takes the stage, reviewing major feature updates and changes since TM3 and showing us where TM is headed in the future - it's the hit of every conference!	GE Theatre
11:00 am – 12:15 pm	**TIX TO THE MOON: SALES RULES** (Roundtable, I) So you want to be a wizard? Then you gotta harness the power of sales rules. After a quick review of a simple sales rule and coupon code build, we'll dig into fancier stuff, including promo and sales rule naming schemes for ease of use. Come prepared with the promotional offer you weren't sure how to make happen and we'll brainstorm a solution together.	Guild Room
	TM Q&A FOR NEWBIES (Roundtable, B) Why work out-of-the-box? Customize your columns, toolbars, quick find settings and more! We'll cover navigation tips and review fundamental patron database cleanup. Got a workflow question you feel embarrassed asking? This is your session! No one knows what they don't know so let's bask in the basics!	GE Theatre
	TIX TO THE MOON: TICKET FACES (Roundtable, I) A popular impromptu topic now made a dedicated session! Bring your ticket face challenge and we'll master those PICK statements together. The focus will be useful resources and tips to help make your next ticket face a calm experience instead of a hunt-n-peck nightmare.	Addy Dance Studio
12:15 pm – 1:15 pm	**Lunch**	Fenimore Gallery
1:15 pm – 2:30 pm	**TIX TO THE MOON: SUBSCRIPTION Q&A** (Roundtable, I) I scream, you scream, we all scream for subscriptions! Bring any question you've got and we'll figure it out together: basic package builds, rollover review, optional shows, auto renewals, cross-venue packages, seat priorities, etc, etc, etc...	Addy Dance Studio
	FORM LETTERS TAKE FLIGHT: WORKFLOW NOTIFICATIONS (Roundtable, I) Get an email alert when someone buys a merch ticket add-on. Send automated email alerts to your boss whenever large donations come in. We'll review what actions can trigger an automatic internal email and then step through a notification build together. Feel free to come armed with notification wish lists and we'll groupthink for ya! Experience adding database fields to a Form Letter recommended.	Guild Room
	TIX TO THE MOON: MAP BUILDING (Roundtable, B) Intro Track: How do you become a ticket zen master? Become one with the map. Together, we'll dive into reserved pricing map creation, pulling back when necessary to show how the map relates to an event build setup, online sales behavior and reporting criteria.	GE Theatre

2:45 pm – 4:00 pm	**FORM LETTERS TAKE FLIGHT: MERGING & CALCULATED FIELDS** 👥 Ⓘ	Guild Room
	Smart TVs. Smart Phones. If you aren't using Smart Form Letters, you're missing out! We'll quickly review adding data fields and customizing formats, then move into row level data and calculated fields.	
	DATAHEAD: CRITERIA BUILDING 👥 Ⓑ	Addy Dance Studio
	Intro Track: Data is proof that Artsman loves us and wants us to be happy. We'll start with basics and move as fast as the room wants. Using common Patron, Address, Ticket and Donation fields, we'll focus on tips to pose your question in a way a computer understands, find the right field and troubleshoot unexpected results. We're gonna get our hands dirty, so definitely bring questions and example problems. Laptops highly recommended.	
	TIX TO THE MOON: SPECIAL PERFORMANCE SETTINGS & Q&A 👥 Ⓑ	GE Theatre
	Intro Track: Ever wondered what some of those Sales Methods were all about? Ever wanted to try clicking some of those other performance settings just to see what happened? This is your performance playground opportunity! We'll walk through all the performance settings, including Course and Touring Sales Methods and Pay What You Can. Experience setting up simple Events recommended.	
4:15 pm – 5:15 pm	**MINI SESSIONS** 👥 Ⓑ	Guild Room
	It's the speed dating of the user conference world! We'll have several stations rotating through a range of topics every 10-15 minutes. This is for those little fiddly things that don't need a whole session. Topics include: Automatic Fees, Pick-Your-Own Maps, Events as Fundraisers, Transaction Imbalance Troubleshooting, Report Cards, and When to Use Plugins.	
5:30 pm – 6:00 pm	**Cocktail Hour**	Atrium
6:00 pm – 8:00 pm	**Pizza Party + Movie/Game Night**	GE Theatre

TUESDAY Sep 22, 2020

8:30 am – 9:30 am	**Continental Breakfast**	Fenimore Gallery
9:30 am – 10:45 am	**WEB ME BABY: NAVIGATING THE PAGES** 🖥 Ⓐ	Addy Dance Studio
	Starting to customize your webstore experience and feeling overwhelmed? Get started with a review of TM's webstore file structure: where pages live, how to find the most recent template pages, how to safely test changes, etc. Recommended with Web Me Baby: Intro to HTML.	
	SHOW ME DA MONEY: DEVELOPMENT BOOT CAMP 🖥 Ⓑ	Guild Room
	Intro Track: Give us your money and we will show you the most efficient way to take it! Learn about campaign setup, gift types, reminder letters, payment schedules, basic reporting and more! We take cash, credit, checks and unpaid pledges.	
	TO TM & BEYOND: TM'S API 🖥 Ⓐ	GE Theatre
	Artsman will review what the API is, aiming to inspire your brainstorming with a show-and-tell of current (and possible!) uses. Get a sneak peak behind the curtain and see the API structure, including basic navigation tips and simple query building.	
11:00 am – 12:15 pm	**Show Me Da Money:** Development Boot Camp Cont'd 🖥 Ⓑ	Guild Room
	WEB ME BABY: INTRO TO HTML 🖥 Ⓐ	Addy Dance Studio
	For the no longer truly terrified but as of yet uninitiated. You've moved beyond changing plain text and want to start making things pretty and functional, not just accurate. Recommended with Web Me Baby: Navigating the Pages.	
	TO TM & BEYOND: POWER BI 🖥 Ⓘ	GE Theatre
	Curious about all the Excel and Microsoft hype for PowerBI but not sure where to start? There are no dumb questions here - just the application live connected to Proctors TM database, other nerds looking for a BI posse, and time to play. Familiarity with TM fields and Excel pivot tables/charts recommended.	
12:15 pm – 1:15 pm	**Lunch**	Fenimore Gallery

1:15 pm – 2:30 pm	**WEB ME BABY: SEAT VIEW** (A)	Addy Dance Studio

WEB ME BABY: SEAT VIEW   (A)   Addy Dance Studio

Want to embed photos in your webstore to show patrons what the view looks like from their selected seats? We'll walk through the technical steps to get TM's Seat View up and running, making your webstore super slick! Experience with pricing map setup and webstore edits recommended.

SEEING PAST DEFAULTS   (B)   Guild Room

Intro Track: We're gonna race through all the obvious options that make TM unique for you: system preferences, employee permissions and code tables. You won't remember it all, but the next time someone says "I wish TM could...", you'll say, "I think I saw that somewhere once actually..." Thus will you be reborn as a modern-day arts administration hero.

TIX TO THE MOON: TRANSACTION HISTORY & WEB LOGS   (B)   GE Theatre

Intro Track: What on earth did that patron do? Put your investigative skills to the test! Read transaction history or web logs to better understand the steps an employee or patron took to complete their purchase - or totally screw it up!

2:45 pm – 4:00 pm   **CREDIT CARD & PAYMENT OPTIONS**   (I)   Addy Dance Studio

Artsman has their finger on the pulse of changing credit card requirements and payment security standards and they are here to walk through the changing landscape with us.

DATAHEAD: MAIL LISTS IN DEPTH   (B)   GE Theatre

Intro Track: This is the full rodeo folks. If you haven't run a mail list yet, it's time to get in the ring - learn how to create lists and incorporate them into your daily business practices. If you think mail lists are old hat, hold your horses - we're going to click every freakin' right-click option from the Who's In tab, check every possible box and note we can find and even do a quick mail list import.

WEB ME BABY: E-TICKET CUSTOMIZATIONS   (A)   Guild Room

Have you taken the e-ticket sponsor plunge? Do your volunteer ushers beg you to make this larger and that smaller? We'll focus on customizing just the e-ticket (and possibly email confirmation) webpage. If you're new to this, we recommend attending Navigating the Web Pages and Intro to HTML sessions first.

4:15 pm – 5:15 pm   **MINI SESSIONS REPRISE**   (B)   Guild Room

It's the speed dating of the user conference world! We'll have several stations rotating through a range of topics every 10-15 minutes. This is for those little fiddly things that don't need a whole session. Topics include: Data Files, Queued Reports, Non Gift Certificate Passes and Plastic Cards, TM Community, Adding Merch Tickets to Events, and Merchant Pin Codes

6:30 pm – 10:00 pm   **Group Outing** (dinner NOT provided)**:** *The True* **at Capital Repertory Theatre**   Meet at Stratton Plaza

Our producing LORT theatre theREP has a new home in Albany this season! Join us for the opening show of the season. Sharr White's *The True* explores the bounds of love, loyalty, and female power in the male-dominated world of 1977 machine politics. When it comes to Polly Noonan, there's no fine line between the political and personal. For her...it's only personal. Especially now that her hero, 'mayor for life' Erastus Corning, is in a pitched battle for control of the Albany Democratic Party.

WEDNESDAY Sep 23, 2020

Time	Session		Location
8:30 am – 9:30 am	**Continental Breakfast**		Fenimore Gallery
9:30 am – 10:45 am	**TO TM & BEYOND: EXCEL CRASH COURSE**	I	Addy Dance Studio
	You've moved past mail lists and reports and need to dig into some raw numbers, but that Excel class in college feels like it was a really long time ago. Using TM exports, we'll review good data format, foundational Excel structures and formula-building tips. Please bring an example of a recent research need and we'll do it together!		
	DATAHEAD: CLEANING UP NON-PATRON INFORMATION	B	Guild Room
	Patrons shouldn't get all the attention - there's a whole database to clean up! This session is dedicated to sharing what's worked and what hasn't for maintaining easy to use TM lists (pricing maps, campaigns, promotions, saved criteria, form letters, etc). We'll talk about setup and maintenance of naming schemes, note protocols, event and performance codes, custom folders and whatever else threatens to feel like a kitchen junk drawer!		
	DITCH THE SPREADSHEETS: RESOURCES	I	GE Theatre
	Dig deeper into Facilities Management with Resources, customizable tracking and/or billing for everything from artist fees to music stands to outside labor to fog machines. We'll start from square one, walk through setting a couple up, then add them to tasks and and we won't stop until we've successfully pulled data on our test entries!		
11:00 am – 12:15 pm	**DATAHEAD: RECORDS COUNT REPORT**	I	Addy Dance Studio
	Discover the most underutilized and customizable report in TM!		
	DITCH THE SPREADSHEETS: TASKS & PROJECTS	B	GE Theatre
	Intro Track: Take your organization skills to the next level! Learn what tasks, projects and calendars are and how you can use them to track to-do's, manage facility use, save key documentation and more!		
11:00 am – 11:45 am	**TIX TO THE MOON: INVOICE OPTIONS IN-DEPTH**	B	Guild Room
	Intro Track: Time to click through ALL the invoice builder options and see all possible customizations.		
11:45 am – 12:15 pm	**SHOW ME DA MONEY: ROUND-UP DONATIONS**	B	Guild Room
	Intro Track: Every little bit counts! Here's where you learn how to set up, collect and track your round-up donations.		
12:15 pm – 1:15 pm	**Lunch**		Fenimore Gallery
1:15 pm – 2:30 pm	**DATAHEAD: ACCOUNTING/FINANCE CRITERIA**	I	Addy Dance Studio
	Get the tea on how TM handles accounting entries from cash and receivables to deferred and earned revenue. We'll explore reports that will help you get all the info you need into your accounting software. We'll also look at how event setup affects G/L entries.		
	FORM LETTERS TAKE FLIGHT: E-BLASTS	B	Guild Room
	Intro Track: Learn how to use form letters for mass eblasts - it's time to get the word out!		
	DITCH THE SPREADSHEETS: VOLUNTEER MANAGEMENT	B	GE Theatre
	One of the most popular sessions from past conferences! Artsman dives into Volunteer Management tools available to track, schedule, remind, award, etc.		
2:45 pm – 3:15 pm	**DATAHEAD: REVEAL**	B	GE Theatre
	Intro Track: If you haven't been playing with Reveal, TM's online visualization dashboard, you're missing out! It's been released for over a year so let's get up to speed on the new features with recommendations for personalized dashboards.		