

Festival Booking User Manual

This manual has been written by Tricia Perrin, the 2017 Festival Treasurer, with some extra material from the Anthony Hall.

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1 Before you start

- You will need to discuss with the web editor how you want your booking form configured
- The web editor will give you the link to the admin page, set up your user name, and help you set up a password

1.1 Configuring the booking form

The following page shows an example booking form. Items in black are fixed. You choose the items in red:

- 1 The name of the festival
- 2 Start and end dates
- 3 Last discount date (optional)
- 4 Introductory remark (optional)
- 5 Options. An option can be one of five kinds:
 - a A group where just one option can be chosen (eg Booking Type)
 - b A group where several options can be chosen (eg What instruments are you bringing?)
 - c A stand-alone yes/no options (eg Discounted concert ticket)
 - d A number (eg Extra concert tickets)
 - e Text (eg Dietary requirements)

Options have a short name and a longer description. Each option except text can have a price and optionally a discounted price. You should discuss what options you want with the web editor and make sure that you are collecting all the information you need to organise the festival and produce badges, delegate packs, catering lists etc.

- 6 Closing remark (optional)

The web editor will produce an on-line form and a paper booking form. For the paper form you need to give a postal address and the payee information for cheque payments.

You need to provide details of your bank account so this can be configured in PayPal. You can choose whether or not to allow BACS payments into this account if a user fails to complete a PayPal payment.

In addition to the booking form used by the general public, you can also have options for your own use. For example you can have options for booking conductors, complimentary attendance, shops etc.

2 To get into/out of the online booking system admin page

- Use the link to the admin page (see **Before you start**; I have saved this on my favourites)
- You will see a pop-up saying “Progress. Not authorised for festival” or similar. Click OK
- Scroll to the very bottom of the page, and on the right hand side click on “Editor Login”
- Use the user name and password you have set up with Anthony. You could tick the box to say “Remember me” but I never do this since I had my computer stolen! Click “Login”
- You will see 4 tabs across the top of the page (for each one, see relevant detail in next sections)
 - Confirm payment
 - Reports and Emails
 - Edit booking
 - Enter paper booking
- You can log out by clicking on the “Logout” at the bottom right of the page, or simply by closing the page, but clicking the cross in the top right hand corner.

3 Enter Paper booking

- Online bookings do not normally require the administrator to do anything, so the first thing you are likely to need to do is log a paper booking, if you receive a paper or email booking accompanied by a cheque or BACS payment.
- Click on the “Enter paper booking” tab.
- Enter all the details from the paper form onto the on-screen form. Email addresses are compulsory for on-line bookings, but not for paper bookings, so if someone doesn't have an email address, leave it blank.
- In the “paid by” section at the bottom, select cheque or BACS. The reference is free format. For cheques, I used the bank paying in slip number as a reference and for BACS I just put BACS and the date the money showed in the bank account.
- For a paper booking accompanied by a payment, I normally ticked the “send email” box.
- You can also use the “Enter paper booking” tab for setting up bookings conductors/performers/volunteers etc., who are not paying, by using the “complimentary” options that the web editor will set up for you. This ensures that they are included in your numbers for meals etc. However, you may choose not to tick the “send email” box. (And if you don't have all the obligatory information, you may have to type n/a)

4 Edit booking

- This was particularly useful for anyone who changed their booking. In our case, lots of people booked to come to the festival online....but at a later date wanted to book a discounted concert ticket (only available to festival goers) In order do this, they had to send me a cheque or a BACS payment, telling me their original booking reference.
- Click on the “Edit booking” tab
- In the “booking ref” box, type in the booking reference and click Edit.
- You will see a form exactly like the “Enter paper booking” filled with the details of that booking.
- You can make any changes to the order.
- The difference in the payment will show at the bottom of the form. Select the payment type, and amend the date. NB in some cases you may be reimbursing some or all of the payment, but this did not happen to me much. The web editor can issue full or partial refunds through PayPal.
- You can decide whether it is appropriate to tick the “send email” box or not
- I was not able to cancel a booking, but I think the web editor will make that facility available in future.

5 Confirm payment

- This is set up in case people had a problem with PayPal, and their payment was not accepted. In that case, the payer will receive an email which tells them to send you a payment, with their booking reference
- When you have received their payment, click on the “Confirm payment” tab
- In the “Booking” box, click on the down arrow to find the booking you are confirming. Highlight it, and all their details will appear.
- Complete the payment details as if for a paper booking, then click “confirm”
- In point of fact, I don't think I used this more than once or twice. Very few people had problems with PayPal, but a couple who did, did not make clear to me that they already had booking references, so I just treated them as new paper bookings!

6 Reports and Emails

6.1 Reports

- Click on the Reports and emails tab if you want to see a list of bookings or payments, or if you want to send out a mass email to any group of festival goers.
- The report I used most often is the first one “Get summaries for confirmed bookings from XXXX to XXXX” You can click on the down arrow to change “confirmed” to “pending” etc., and also select different date parameters, but I rarely needed to do that.
- It may be different on different computers, but on my when I clicked “Get bookings” a pop up opened saying “Open with Microsoft Excel” and I clicked “Ok”
- The report then opened on the screen, listing all the details of all the bookings, and I could use normal Excel formulae etc. to put a “sum” at the end to see how many weekend bookings, Saturday bookings, concert bookings etc. or sort or find etc.
- If someone contacted me to confirm their booking, I would run this report and then do an excel “find”. However, I know Anthony is planning to create a search facility in future.
- The other standard report is the last line on the tab “Get payments from Date1 to Date2”. Put in your date parameters, then click “Get payments” and the report appears just like the “Get bookings” report.
- You can also ask the web editor to set up custom reports, such as people who will need a lunch on Sunday or anything else that is useful for organising your festival.

6.2 Emails

- If you want to send “bulk” emails to all festival goers, or maybe just certain groups of festival goers (e.g. just Saturday festival goers, or just vegetarians!)then you will need to work closely with the web editor who will set up the “group” and will set up the email from your draft.
- When he has done that, you can check that he has the right people in the distribution list by using the “Get list” option. That works the same way as “Get bookings” or “Get payments”.
- To test the email itself go to the “Send email to...” line. Select your parameters, then press “test” This shows you on screen how many emails would be sent (so you can check against the list) and sends one email to the administrator’s personal inbox, to check wording, layout etc.
- When you are happy with that, go to the “Send email to...” line, choose the correct parameters, and click on “Send emails”

For the 2017 festival in Cambridge, I found the online system invaluable, and really hope it will be useful for future festivals too. If you have any queries about how I used the system, do get in touch on 01353 777601 or by email t2perrin@btinternet.com.

Good luck!
Tricia Perrin