## **Building a Package**

Packages allow you to bundle multiple events together as one item so that the customer can purchase all the items for one price.

1. Log In to Administration.

2. Choose the Sales Organization folder where you wish to build the Events and Package.

3. If your Sales Organization folder does not have the Package option listed, you will need to add the option in Tree Management.

- Right-click your Sales Organization folder. In the new window, select the Tree Management tab.
- Checkmark Packages. Select Apply to save your changes and OK to close the window.

| A  | Organization: Movies       | - 🗆 ×        |
|--|----------------------------|--------------|
| Movies   |                            | 2297         |
| General Billing Contact Customer Service Contact | Tree Management Logo Notes |              |
| Sales Line Options                               |                            |              |
| 🖌 Events   | ✓ Templates                |              |
| Shows  | Venues                     |              |
| ☐ Shorts   | Packages                   |              |
| Memberships                                      | Benefits                   |              |
| Catalog Products                                 | Donations                  |              |
| Gift Card Programs                               |                            |              |
| Other Options                                    |                            |              |
| Confirmation Text                                | Order Fees                 |              |
| Payment Policies                                 | ✓ Simple Price Mode        |              |
| Permissions                                      | Questions                  |              |
| Org Restricted Orders                            | Promotions                 |              |
|  |                            |              |
|  |                            |              |
|  |                            |              |
|  |                            |              |
|  | ОК                         | Cancel Apply |

4. Individual Shows or Events must be built first and must include prices that Allow Package Sale.

- Prices can be built with a dedicated package Ticket Type or on the regular event price if the price correlates with the total sum of the package prices once bundled.
- The Price can be built with dollar amount split across all events or made as \$0 and build the package price as a Catalog Component later in the process.

| Sales Channel         | AMS Box Office                | ~             | ✓ Enabled             |
|-----------------------|-------------------------------|---------------|-----------------------|
| Ticket Type           | Package                       | ×             | ✓ Include Service Fee |
| Functional Area       | Level 1 - Restricted Price(s) | ~             | ✓ Allow Package Sale  |
| Event Ticket Format   | One Row Parks                 | × 🥎           |                       |
| Package Ticket Format | No Ticket Print               | *             |                       |
| Display Sequence      | 55 🔷                          |               | Sales Occurred        |
| Name Assign           | None                          | ~             |                       |
| Quantity Restriction  | Min Per Order 0 🚔             | Max Per Order | 10 🚖                  |
|                       |                               |               |                       |
| Add New Delete        |                               | ОК            | Cancel Apply          |

Once you have all your individual shows, events, or items built, you are now ready to start creating your Package with the Components.

5. Click the Package icon, then right-click and select New.



6. Select the Package Group from the drop-down. Enter the Name and External Name of the package. (External Name is what will appear online; Name is what will appear in AMS).

| A   | Package: New          |                  |                                      |                   |                    |             |            | - 0          | ×     |
|-----|-----------------------|------------------|--------------------------------------|-------------------|--------------------|-------------|------------|--------------|-------|
| E   | Movies                |                  |                                      |                   |                    |             |            |              |       |
| Not | es                    |                  |                                      |                   |                    |             |            |              |       |
| Ger | neral Package Types   | Sales Channels   | Delivery Search Categories           | Access BuyerTypes | Short Descriptives | Description | Extra HTML | Confirmation | Image |
|     | Group                 |                  | ~                                    |                   |                    |             |            |              |       |
|     | Name                  |                  |                                      |                   |                    |             |            |              |       |
|     | External Name         |                  |                                      |                   |                    |             |            |              |       |
|     | Project Code          |                  | ~                                    |                   |                    |             |            |              |       |
|     | Enforce Selection     | of Optional Comp | onent Groups                         |                   |                    |             |            |              |       |
|     | Minimum 0             | *<br>*           |                                      |                   |                    |             |            |              |       |
|     | Maximum 0             | *                |                                      |                   |                    |             |            |              |       |
|     | Display Sequence      | 1 🖨              |                                      |                   |                    |             |            |              |       |
|     | Enabled               | $\checkmark$     | Require Customer                     |                   |                    |             |            |              |       |
|     | Allow Renewals        |                  | Assign Order Customer                |                   |                    |             |            |              |       |
|     | Allow Web Seat Select | tion             | Group By Tier For Renewal<br>Seating |                   |                    |             |            |              |       |
|     |                       |                  |                                      |                   |                    | ОК          | Cancel     |              | Apply |

- The Enforce Selection of Optional Component Groups allow you to sell a package when not every event is required but do require a certain number of events to be picked to make the package. Make sure to set the Minimum and Maximum to use this feature.
- Allow Renewals should be check if this package is being renewed year after year.
- Require Customer should always be checked when selling a package in order to store important customer data for the multiple events.

7. The Package Types tab is where you will build the package names and create

the Marketing Price. Note: the marketing price is only for display. The price of the Package will be calculated with the individual Event Component prices or by the Catalog Component. (Image 5)

| General  | Package Types | Sales Channels | Delivery   | Search C | Categories | Access BuyerTypes | Short | Descriptives | Description | Extra HTM | L Confirmation  | Image |
|----------|---------------|----------------|------------|----------|------------|-------------------|-------|--------------|-------------|-----------|-----------------|-------|
| Name     |               | Disp           | olay Seque | nce      | Sales Line | Туре              |       | Enforce Qty  | Min         | Max       | Marketing Price |       |
| Adult    |               | 1              |            |          | Season Su  | bscription        |       | False        | 0           | 0         | \$90.00         |       |
| Senior   |               | 2              |            |          | Season Su  | bscription        |       | False        | 0           | 0         | \$80.00         |       |
| Student  |               | 3              |            |          | Season Su  | bscription        |       | False        | 0           | 0         | \$60.00         |       |
| ADA Adu  | ılt           | 4              |            |          | Season Su  | bscription        |       | True         | 0           | 2         | \$90.00         |       |
| ADA Sen  | ior           | 5              |            |          | Season Su  | bscription        |       | True         | 0           | 2         | \$80.00         |       |
| ADA Stud | dent          | 6              |            |          | Season Su  | bscription        |       | True         | 0           | 2         | \$60.00         |       |
| Comp     |               | 98             |            |          | Season Su  | bscription        |       | False        | 0           | 0         | \$0.00          |       |
| ADA Com  | np            | 99             |            |          | Season Su  | bscription        |       | True         | 0           | 2         | \$0.00          |       |

If you are unable to select the Sales Line Type when trying to create a Package Type, please contact your Agile Support Agent.

| 📌 Package Type                           | -    |     | $\times$ |
|--|------|-----|----------|
| 1 - Special Engagements                  |      |     | 3886     |
| General Promotions Questions             |      |     |          |
| Package Type Name Member                 | ~    |     |          |
| Display Sequence 1                       |      |     |          |
| Sales Line Type Package                  | ~    |     |          |
| Restriction Type Restricted Package Type | ~    |     |          |
| Enforce Qtys                             |      | _   |          |
| Minimum 0 🚖                              |      |     |          |
| Maximum 0 🚖                              |      |     |          |
| Marketing Price \$ 180.00                |      |     |          |
| Ticket Format No Ticket Print            | ~    |     |          |
| ✓ Enabled                                |      |     |          |
| OK Car                                   | icel | Арр | bly      |

- 8. Click the Sales Channels tab to set the package on sales dates and times.
- 9. Click the Delivery tab to choose delivery options for the package.

10. Access Buyer Types allows you to choose the different buyer types that will be allowed to sell this package. (This is a required function.)



12. The Short Descriptive tab is where you will be able to put a short synopsis or description of what is available through this package.

13. The Description tab is where you will place a longer description about the package.

14. The Extra HTML tab allows you to add a long description information for this package.

15. The Confirmation tab is where you can add any information that you would like the customer to know when they complete the order (*i.e. Thank you for purchasing this package. Season Packages will be mailed on 1/1/2222*).

16. Click the Image tab to upload any marketing image for the package.

17. Once you have your Package information completed, click Apply to save your changes and OK to close the window. Then, right-click in Component Group and select New to add the individual components to the package.

| 9   | Component Group |
|-----|-----------------|
| ē   |                 |
| G   |                 |
| e I |                 |
| Ĕ   | New             |
| đ   | Proverties      |
| 5   |                 |
| 0   |                 |

18. Name the Component Group. (i.e. Show 1)

19. Set the Enforce Component Quantities (if needed) and Display Sequence for this Component Group.

| General | Event Compo   | nents   | Catalog Components | Description | Note | es         |           |         |               |               |       |
|---------|---------------|---------|--------------------|-------------|------|------------|-----------|---------|---------------|---------------|-------|
|         |               |         |                    |             |      | _          |           |         |               |               |       |
| Name    | •             |         |                    |             |      |            |           |         |               |               |       |
| En En   | force Compone | ent Qua | antities           |             |      |            |           |         |               |               |       |
| N       | Minimum ()    | 1       | h                  |             |      |            |           |         |               |               |       |
| N       | Maximum ()    | 1       | h                  |             |      |            |           |         |               |               |       |
| Displa  | ay Sequence   | 2       | ×                  |             |      |            |           |         |               |               |       |
| Enabl   | ed            | V       |                    |             |      |            |           |         |               |               |       |
|         |               |         |                    |             |      |            |           |         |               |               |       |
|         |               |         |                    |             |      |            |           |         |               |               |       |
|         |               |         |                    |             |      |            |           |         |               |               |       |
| Compone | ent           |         |                    |             | Org  | Multiplier | Mandatory | Enabled | Print On Card | Show Availabl | e Qty |

20. Click Apply to save information on the General tab.

21. Click the Event Component tab to define your package:

• Select Sales folder containing the single events

| General Event Components Catalog 030 | nponents Description Notes                                 |   |                    |           |                             |             |              |
|--------------------------------------|--|---|--------------------|-----------|-----------------------------|-------------|--------------|
| 2015-16 Events     2015-16 Season    | Start Date:<br>End Date:<br>Sales Line Type<br>Ticket Type | Monday , July 27, 2015<br>Wednesday, July 27, 2016<br>General Admission<br>Subscription<br>Search | •<br>•<br>•        |           |                             |             |              |
| Organization                         | Event Name   | Event Date  | Venue              | Tier Name | Sales Line Type             | Ticket Type |              |
|                                      |  |   |                    |           |                             |             |              |
|                                      |  |   |                    |           | Selected package type Adult | ~           | Add Selected |
| Component                            | Org Multiplie  | Mandatory Enabled Print On Card   | Show Available Qty |           |                             |             |              |

• Use Start Date & End Date of the individual events to search for events within those dates.

| General Event Components Catalog | onents De: | scription Notes |               |         |             |          |               |           |                           |             |              |
|----------------------------------|------------|-----------------|---------------|---------|-------------|----------|---------------|-----------|---------------------------|-------------|--------------|
| E .                              |            | Start Date:     | Monday .      | July 2  | 7, 2015     |          |               |           |                           |             |              |
| 2015-16 Events                   |            | Cito Date.      | Canard Admin  | olay 2  | 7. 2010     |          |               |           |                           |             |              |
|                                  |            | Sales Line Type | General Admis | sion    |             | *        |               |           |                           |             |              |
|                                  |            | Ticket Type     | Subscription  |         |             | ~        |               |           |                           |             |              |
|                                  |            |                 |               |         | Searc       | h        |               |           |                           |             |              |
| Organization                     | Event Nam  | e               | Event         | Date    |             |          | Venue         | Tier Name | Sales Line Type           | Ticket Type |              |
|                                  |            |                 |               |         |             |          |               |           |                           |             |              |
|                                  |            |                 |               |         |             |          |               |           | Selected package type Adu | it v        | Add Selected |
| Component                        |            | Org Multiplie   | r Mandatory   | Enabled | Print On Ca | ard Show | Available Qty |           |                           |             |              |

• Select the Sales Line Type from the drop-down menu.

| General Event Components Catalog (https://www.catalog.com/ | nts Description Notes |  |               |           |                             |                |
|--|-----------------------|--|---------------|-----------|-----------------------------|----------------|
| B  | Start Date:           | Monday . July 27, 2015                 |               |           |                             |                |
| 2015-16 Events   | End Date:             | Wednesday, July 27, 2016               |               |           |                             |                |
| 2015-16 Season   | Sales Line Type       | General Admission V                    |               |           |                             |                |
|  | Ticket Type           | Subscription V                         |               |           |                             |                |
|  |                       | Search                                 |               |           |                             |                |
| Organization Ex  | vent Name             | Event Date                             | Venue         | Tier Name | Sales Line Type             | Ticket Type    |
|  |                       |  |               |           |                             |                |
|  |                       |  |               |           |                             |                |
|  |                       |  |               |           | Selected package type Adult | ✓ Add Selected |
| Component  | Ora Multiplie         | r Mandatory Enabled Print On Card Show | Available Qtv |           |                             |                |

• In the Ticket Type drop-down, select the ticket type associated with the package price

| General Event Components Catalog Omponer | nts Description Notes |   |                 |           |                             |             |              |
|--|-----------------------|---|-----------------|-----------|-----------------------------|-------------|--------------|
| B and the local frame                    | Start Date:           | Monday , July 27, 2015                  |                 |           |                             |             |              |
| 2015-16 Events                           | End Date:             | Wednesday, July 27, 2016 🗐 🛩            |                 |           |                             |             |              |
| 2015-16 Season                           | Sales Line Type       | General Admission 🗸                     |                 |           |                             |             |              |
|  | Ticket Type           | Subscription V                          |                 |           |                             |             |              |
|  |                       | Search                                  |                 |           |                             |             |              |
| Organization Ev                          | ent Name              | Event Date                              | Venue           | Tier Name | Sales Line Type             | Ticket Type |              |
|  |                       |   |                 |           |                             |             |              |
|  |                       |   |                 |           |                             |             |              |
|  |                       |   |                 |           |                             |             |              |
|  |                       |   |                 |           | Selected package type Adult | ~           | Add Selected |
| Component                                | Org Multiplie         | er Mandatory Enabled Print On Card Show | v Available Qty |           |                             |             |              |

• Click the Search button to populate the list of events with that ticket type.

| General Event Components Catalog (http:// | ents Description Notes |                                 |                    |           |                       |             |       |          |
|---|------------------------|---------------------------------|--------------------|-----------|-----------------------|-------------|-------|----------|
| B   | Start Date:            | Monday , July 27, 2015          | ¥                  |           |                       |             |       |          |
| - 2015-16 Events                          | End Date:              | Wednesday, July 27, 2016        | -                  |           |                       |             |       |          |
| 2015-16 Season                            | Sales Line Type        | General Admission               | ~                  |           |                       |             |       |          |
|   | Ticket Type            | Subscription                    | ~                  |           |                       |             |       |          |
|   |                        | Search                          |                    |           |                       |             |       |          |
| Organization Ex                           | vent Name              | Event Date                      | Venue              | Tier Name | Sales Line Type       | Ticket Type |       |          |
|   |                        |                                 |                    |           |                       |             |       |          |
|   |                        |                                 |                    |           | Selected package type | Adult       | ✓ Add | Selected |
| Comment                                   | Ora Multipli           | Mandatany Enabled Rriet On Card | Show Available Obv |           |                       |             |       |          |

• Select each of the events that will be bundled in this Component Group.

| General Event Components Ca      | atalog Components De  | escription Notes   |   |                               |           |                           |              |
|----------------------------------|---|--|---|-------------------------------|-----------|---------------------------|--------------|
| 2015-16 Events<br>2015-16 Season |   | Start Date:<br>End Date:<br>Sales Line Type<br>Ticket Type | Monday , July 27, 2015<br>Wednesday, July 27, 2016<br>General Admission<br>Subscription |                               |           |                           |              |
|                                  |   | 12.11  | Search  | 1                             |           |                           |              |
| Organization                     | Event Name  |  | Event Date  | Venue                         | Tier Name | Sales Line Type           | Ticket Type  |
| 2015-16 Events                   | 7-04039   | - Marcin   | 8/7/2015 7:30 PM  | The Law Name Control          | Admission | General Admission         | Subscription |
| 2015-16 Events                   | 1.000   | - 10 million   | 8/8/2015 7:30 PM  | Nut Take Research Instates    | Admission | General Admission         | Subscription |
| 2015-16 Events                   | The second se | - Contraction  | 8/13/2015 7:30 PM   | Total State Street Control of | Admission | General Admission         | Subscription |
| 2015-16 Events                   | - Concernent Concernent   |  | 8/14/2015 7:30 PM   | Not Spin Research reader      | Admission | General Admission         | Subscription |
|                                  |   |  |   |                               |           | Selected package type Adu | å.           |
| Component                        |   | Ora Multipli   | ar Mandatony Enabled Print On Ca  | rd Show Available Obv         |           |                           |              |

• At the right side of the event list, choose the Selected Package Type from the drop-down menu and click the Add Selected button.

| General Event Components Catalog | Components Description Notes   |   |                             |           |                             |              |              |
|----------------------------------|--|---|-----------------------------|-----------|-----------------------------|--------------|--------------|
| -                                | Start Date:  | Monday , July 27, 2015                  |                             |           |                             |              |              |
| 2015-16 Events                   | 2015-16 Events End Date:   |   |                             |           |                             |              |              |
| 2015-16 Season                   | 2015-16 Season Sales Line Type   |   |                             |           |                             |              |              |
| Ticket Type                      |  | Subscription                            | ·                           |           |                             |              |              |
|                                  | 13   | Search                                  |                             |           |                             |              |              |
| Organization                     | Event Name   | Event Date                              | Venue                       | Tier Name | Sales Line Type             | Ticket Type  | ^            |
| 2015-16 Events                   | The Control of Manager   | 8/7/2015 7:30 PM                        | Ind Set Street Course       | Admission | General Admission           | Subscription |              |
| 2015-16 Events                   | <ul> <li>An and the second s</li></ul> | 8/8/2015 7:30 PM                        | Total State Press, Treasure | Admission | General Admission           | Subscription |              |
| 2015-16 Events                   | The Industry of Cards  | 8/13/2015 7:30 PM                       | The Real Property Property  | Admission | General Admission           | Subscription |              |
| 2015-16 Events                   | <ul> <li>Testing (Walks)</li> </ul>  | 8/14/2015 7:30 PM                       | Not Take Disease Treatment  | Admission | General Admission           | Subscription | ~            |
|                                  |  |   |                             |           | Selected package type Adult | ~            | Add Selected |
| Component                        | Org Multip   | lier Mandatory Enabled Print On Card Sh | ow Available Qty            |           |                             |              |              |

• The Package Type and the Event Component Ticket Type will appear in the Component table.

| General Event Components | Catalog Component | s Description Note        | 5         |             |              |           |         |               |                    |           |                         |              |   |              |
|--------------------------|-------------------|---------------------------|-----------|-------------|--------------|-----------|---------|---------------|--------------------|-----------|-------------------------|--------------|---|--------------|
| 3                        |                   | Start Date:               |           | Monday      | . July       | 27, 2015  |         |               |                    |           |                         |              |   |              |
| 2015-16 Events           |                   | End Date:                 | ۷         | Vednesdag   | r. July      | 27, 2016  |         |               |                    |           |                         |              |   |              |
| 2015-16 Season           |                   | Sales Line T              | ype (     | General Ad  | mission      |           | ~       |               |                    |           |                         |              |   |              |
|                          |                   | Ticket Type               | 5         | Subscriptio | n            |           | ~       |               |                    |           |                         |              |   |              |
|                          |                   |                           |           |             |              | Sear      | ch      |               |                    |           |                         |              |   |              |
| Organization             | Eve               | nt Name                   |           | Ev          | ent Date     |           |         | Venue         |                    | Tier Name | Sales Line Type         | Ticket Type  |   | ^            |
| 2015-16 Events           | 1.1               | a to the t                |           | 8/          | 7/2015 7:30  | PM        |         | 20.00         | teres from the     | Admission | General Admission       | Subscription |   |              |
| 2015-16 Events           | 1.1               | the local division in the |           | 8/1         | 8/2015 7:30  | PM        |         | The last      | State County       | Admission | General Admission       | Subscription |   |              |
| 2015-16 Events           |                   | to the Walt               |           | 8/          | 13/2015 7:30 | D PM      |         | 100 100       | Sum Property       | Admission | General Admission       | Subscription |   |              |
| 2015-16 Events           | 1.1               | and the second second     |           | 8/          | 14/2015 7:30 | D PM      |         | 154 B. (1990) | State States       | Admission | General Admission       | Subscription |   | ~            |
|                          |                   |                           |           |             |              |           |         |               |                    |           | Selected package type A | dult         | ~ | Add Selected |
| Component                |                   |                           |           | Org         | Multiplier   | Mandatory | Enabled | Print On Card | Show Available Qty |           |                         |              |   |              |
| 🗐 🗌 Adult                |                   |                           |           |             |              |           |         |               |                    |           |                         |              |   |              |
| Event                    |                   |                           |           |             |              |           |         |               |                    |           |                         |              |   |              |
| Bubscription             |                   |                           |           |             |              |           |         |               |                    |           |                         |              |   |              |
|                          | 8/7/2015 7:30 PM  | General Admission         | Admission | 1516E       | 1            | ~         | ~       |               |                    |           |                         |              |   |              |
|                          |                   |                           |           |             |              |           |         |               |                    |           |                         |              |   |              |

- Select Apply to save the changes. (If you want to see the pricing for this grouping and each sales channel, choose the Buyer Type from the drop-down next to Show Prices for.
- If you made a mistake and need to delete a component, checkmark the box next to component and Click the Delete Selected Components button.)

| ndr V                   |                 |     |        |     |
|-------------------------|-----------------|-----|--------|-----|
| Web Standard V Cancel A | Show Prices for | 01/ | Consul | 0   |
|                         | Web Standard    | UK  | Cancel | Mpp |

\*Skip to Step #24 if not using the Catalog Component feature\*

22. A Catalog Component can be added to be included in package. Click the Catalog Components tab and select the Sales Line Type and the Catalog Product Price Type to search for the items.

23. At the right side of the item list, choose the Selected Package Type from the drop-down menu and click the Add Selected button.

| General Event Components C   | Catalog Compone | ents Description | Notes       |                |         |               |                |     |                      |       |            |              |
|------------------------------|-----------------|------------------|-------------|----------------|---------|---------------|----------------|-----|----------------------|-------|------------|--------------|
| to 1971 March Steven Transmi |                 | Sales Line Type  | į           |                |         | •             |                |     |                      |       |            |              |
|                              |                 | Catalog Product  | Price Type  |                |         |               | •              |     |                      |       |            |              |
|                              |                 |                  |             |                |         | Search        |                |     |                      |       |            |              |
|                              |                 |                  |             |                |         |               |                |     |                      |       |            |              |
| Organization                 | Sa              | ales Line Type   |             | Group          |         |               | Name           |     | SKU                  |       | Price Type |              |
|                              |                 |                  |             |                |         |               |                |     |                      |       |            |              |
|                              |                 |                  |             |                |         |               |                | 2   |                      |       |            |              |
|                              |                 |                  |             |                |         |               |                |     |                      |       |            |              |
|                              |                 |                  |             |                |         |               |                |     | Selected package typ | Adult | •          | Add Selected |
| Component                    |                 |                  | Org Multipl | lier Mandatory | Enabled | Print On Card | Show Available | Qty |                      |       |            |              |

24. Once you have added all the components, you are now ready to place your package on sale.

Create an Entry Point to place your package on sale on your website. See <u>How to Create a Package Entry</u> <u>Point</u>.