

Ticketing – How to Define Discounts and Surcharges

<i>Speech</i>	<i>Cursor Actions</i>
When selling tickets, you may offer discounts, or you may have additional surcharges, like taxes or handling charges, which apply to each ticket order. Before you can apply discounts or surcharges to ticket orders, you must set them up in Sumac.	Title: Ticketing – How to Define Discounts and Surcharges
	Title: Defining Discounts
In your Sumac console, click Utilities, Customize Database, and Lookup Lists.	Show console. Expand Utilities, Customize Database, click Lookup Lists
Click the Area: Tickets, then click the Lookup List: Discounts	Click Area: Tickets, click Lookup List: Discounts
Click New to add a new discount.	Click New
Specify a name for the discount. For this example, we'll create a discount for Senior ticket buyers, so name this discount "Senior"	Enter Name: Senior
The description field holds a description of this discount.	Enter Description: over 60
Note that when a discount is no longer being used, you can mark it as Inactive.	Point to Inactive check box
If you are integrating Sumac Ticketing with your website, you can indicate that a discount should not be displayed on the web. If you want to make certain discounts available only to people who call in to your box office or come in to buy tickets in person, click this check box.	Point to "Do not display on web"
A discount rate can be expressed as a currency amount or as a percentage.	Point to "Currency amount or percentage"
If the discount is for \$5 off, put a check mark here,	Put check mark next to "Currency amount or percentage"
Then enter the amount for the discount into this field.	Type "5.00" in Discount (% or amount) field
Alternatively, if seniors get 10% off, leave this check box blank	Un-check "Currency amount or percentage"
And enter the percentage of the discount here.	Type "10" in Discount (% or amount) field
If this discount should be available only to contacts with a specific contact type, choose the applicable contact type from the Contact Type drop-down menu.	Point to Contact Type menu
The account field is used when this discount is added to Ledger Entries. If you are using Ledger Entries, select the appropriate account here. Otherwise leave this field blank.	Select Discount account code.

If this discount is a coupon or promotional code being offered to your buyers, enter the Code for that coupon or promotion here. In order for the buyer to redeem this discount, they will have to enter the correct code when purchasing the ticket.	Point to Code field
If you are using coupons, you can specify that the coupon be applied to a minimum and a maximum number of tickets. For example, if the patron must buy at least two tickets and can only get the discount on up to six tickets, then the minimum and maximum are 2 and 6 respectively.	Point to coupon minimum and maximum fields
If you want to ensure that a patron can only use a discount once, then click to set <i>One coupon per contact</i> .	Point to “One per contact”
If the coupon does not apply to discounted tickets, then set <i>coupon only applies to the base price</i> .	Point to “only applies to base price”
Click OK to save the discount.	Click OK
	Title: Defining Surcharges
A surcharge is an extra charge added to a Ticket Order. Surcharges can be for taxes, shipping, or other special levies. They can be calculated per item, like a per-ticket charge, or per order.	Slide: A Surcharge can be: <ul style="list-style-type: none"> • sales tax • shipping fees • courier charge • value added tax
In your Sumac console, click Utilities, Customize Database, and Lookup Lists.	Show console. Expand Utilities, Customize Database, click Lookup Lists
Click the Area: Tickets, then click the Lookup List: Surcharges	Click Area: Tickets, click Lookup List: Surcharges
Click New to add a new surcharge.	Click New
Enter the name and description of the surcharge.	Enter Name: Tax Enter Description: Retail sales tax
If the surcharge is calculated as a percentage then enter the percentage, if it is a fixed amount then enter the fixed amount.	Enter “13”
Indicate if the surcharge is optional. One that is optional, like an expedited shipping charge, can be added to an order manually. A surcharge that is not optional is added automatically to an order.	Point to “optional” check boxes
Note that you can indicate if the surcharge is optional for orders placed using Sumac directly (in your office), and separately specify whether the surcharge is optional for orders placed through your website.	Point to “Optional In Office” Point to “Optional on Web”
Indicate how the tax is calculated. You have three choices.	Open “Calculated As” menu
“Fixed amount per order” means the discount is a fixed currency amount that is added to each order.	Point to “Fixed amount per order”
“Fixed amount per item” means the discount is a fixed currency amount that is added to each ticket.	Point to “Fixed amount per item”

<p>“Percentage” means the charge added to the order will be calculated as the specified percentage amount, multiplied by the value of the tickets in the order.</p>	<p>Point to “Percentage” Choose “Percentage”</p>
<p>If the surcharge should be allocated to a particular account, choose that account from the drop-down menu.</p>	<p>Choose “Surcharge” account</p>
<p>You may want to specify a limit on the surcharge for each order. For example, you may apply a handling charge of \$3.50 per ticket, to a maximum of \$10.00. Specify that limit in the Maximum Per Order field.</p>	<p>Point to “Maximum per order” field</p>
<p>Click OK to save the Surcharge.</p>	<p>Click OK</p>
<p><i>You should now move on to more training videos to learn more about setting up and using Ticketing in Sumac!</i></p>	<p>Slide: “Move on to Ticketing – How to Define Venues and Seat Blocks”</p>