



Salesware Validation

Version 4.4

accesso

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Validation overview

Validation is a general term used to refer to the process of scanning, swiping or manually entering an access, pass, addit_no, card or guest number in order to authorize purchases, discounts or entrances into restricted areas. There are many ways that validation programs may be implemented. This document:

- Discusses the two general types of validation – auto-validation and validation with a DCI.
- Documents how to configure Salesware module for access and pass record validation.
- Looks at some additional functionality that may be included in validation programs, such as cascading validation.
- Looks at configuring barcode and magnetic swipe fields on Pass and Ticket layouts in order to produce the required functionality at the point-of-sale or when using remote scanning applications such as ScanMan and GateKeeper.

The three major sections of the document describe how to use the three sections shown in the following screen capture of the **SysManager > Activities > DCIs > New/Edit > Action** tab for an item:

The screenshot shows the 'SysManager' application window with the 'DCIs > New/Edit > Action' tab selected. The window title is 'PASSES Cat:UNLIMITED'. The main form has a 'Nickname' field with 'ADTUNLMTD' and a 'Description for DCI List' field with 'Adult Unlimited Pass'. Below these is a 'Fundraising Interface' section with tabs for 'Sales Actions', 'Inventory', 'Required Fields', 'Security', 'Modifiers', 'Price History', and 'Liability'. The 'Action' tab is active, showing sub-tabs for 'General', 'Sales Point Type', 'Restrictions', 'Price', 'Profit Ctrs', 'Web', 'Specials', and 'Printing'. The 'General' sub-tab is selected, displaying the 'Item Type' dropdown set to 'Create Pass' and a 'Validation' section. The 'Validation' section has a 'Sale' radio button set to 'None' and a 'Return' radio button set to 'Optional'. A 'Template' button is visible. A red box labeled 'B' highlights the 'Action Specifics' section, which includes a yellow smiley face icon. Another red box labeled 'C' highlights the 'Validation' section. A third red box labeled 'A' highlights the 'Create Access Record' section, which includes a 'Pass # Entry Optional on Returns' checkbox and a 'Template' button with a barcode icon. On the right side of the window, there are dropdowns for 'Department' (PASSES) and 'Category' (UNLIMITED), and buttons for 'New', 'Dupl', 'Generate Inventory ID', 'Save', and 'Cancel'.

The three sections map to the following parts of this document:

- A – [Access record auto-validation \(access template\)](#)
- B – [Pass auto-validation \(pass action specifics\)](#)

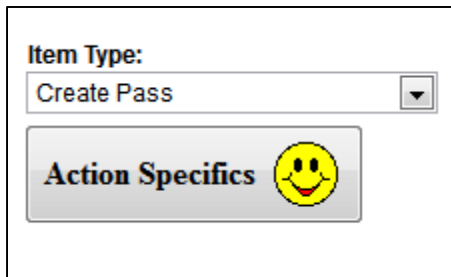
- C – [Validation with a DCI \(validation template\) and validation products](#)

Validation types

There are two basic types of validation: auto-validation and validation with a DCI. These are described in the following paragraphs.

Auto-validation

Auto-validation is also known as self-validation. Auto-validation is configured using the **SysManager > Activities > DCIs > New/Edit > Action tab > Create Access Record** check box > **Template** button or the **SysManager > Activities > DCIs > New/Edit > Action tab > Create Pass** dropdown > **Action Specifics** button – specifically, the **Starting Values**, **Auto Pass Validate**, **Auto Sales** and **Autosale Options** tabs. The configuration done within these tabs specifies the actions to take on the pass or access record's own values when a barcode is scanned (or magnetic swipe is swiped or number is manually entered.)



Item Type:
Create Pass ▼

Action Specifics 😊



☒ Create Access Record

☐ Pass # Entry Optional on Returns

Template

TICKETS / ADULT / 1DAY

Item Discounts Remote Validation

Starting Values Global Settings Auto Pass Validate Auto Sales Autosale Options

Starting Values For New Access Products

Access Product Is Valid:

-- : : AM Through -- : : AM

*ba Now BOD EOD *ba Now BOD EOD

Total Uses Discount Level

1 0

	Points	Money	Unit Value
1	0	\$0.00	☐
2	0	\$0.00	☐

☐ Allow cascading validation of this access product

☐ Create only one Access Record for quantities > 1

Save

Cancel

The process of auto-validation in Sales typically results in the auto-sale of an item. The process of auto-validation remotely with a Symbol unit or gate scanner typically results in the guest being allowed or denied entrance.

Validation with a DCI

Validation with a DCI is configured within the **SysManager** > **Activities** > **DCIs** > **New/Edit** > **Action** tab > **Validation** section for an item. Validation with a DCI *only occurs in Sales*. Items configured with a **Validation Template** are referred to as validation products.

Validation:

Sale: ☐ None ☒ Force ☐ Optional

Return: ☐ Optional ☐ Force

☐ Allow Validation For A Future Date

Template

✓ TICKETS / ADULT / 1DAY

Validation	Item / Pass Relationships
Total Uses	0
Uses Per Week	0
Uses Per Day	0
Points 1	0
Points 2	0
Money 1	\$0.00
Money 2	\$0.00
☐ Multiple validations	☐ Ignore Blackout Dates
☐ Do NOT increment the discount counter	☐ Ignore Days Of Week
	Access Delay 0
	Extend expiration date (days) 0
	Round to end-of-month ☐
	Save
	Cancel

Note: Two fields in the **Validation** template form have been activated that were previously disabled. They are **Ignore Blackout Dates** and **Ignore Days of Week**. This gives the user the ability to validate against an item even if it is not valid for scanning during a blackout period or on particular days of the week.

The process of validating with a DCI begins with the operator adding an item (validation product) to a sale. The operator then clicks on the “other” button (This is the far right button displayed for the active line item. So-called because this button can take a variety of labels, depending on how the item is configured.) The operator then enters a number in order to validate the sale of the item selected (the “other” button may say **Validate**, **Validate?**, **Set Guest** or **Set Guest?** depending on the item sold).

2013-07-17 1 Day Adult Ticket

ITEMS CREATED: 1 OF 1

Previous Next Save

Validation	Guest Info	Guest Info 2	Guest Info 3	Summary
Pass Number				Check
Status	Invalid			Lookup Fingerprint
Message				

Key differences between validating with a DCI and auto-validation

Validation with a DCI can result in a single pass DCI being used to authorize (validate) the purchase of an unlimited number of items (validation products); on the other hand, auto-validation in Sales is restricted to the auto-sale of a single item.

The key to remembering the difference between auto-validation programs and programs that involve validating with a DCI is the order in which the sale proceeds:

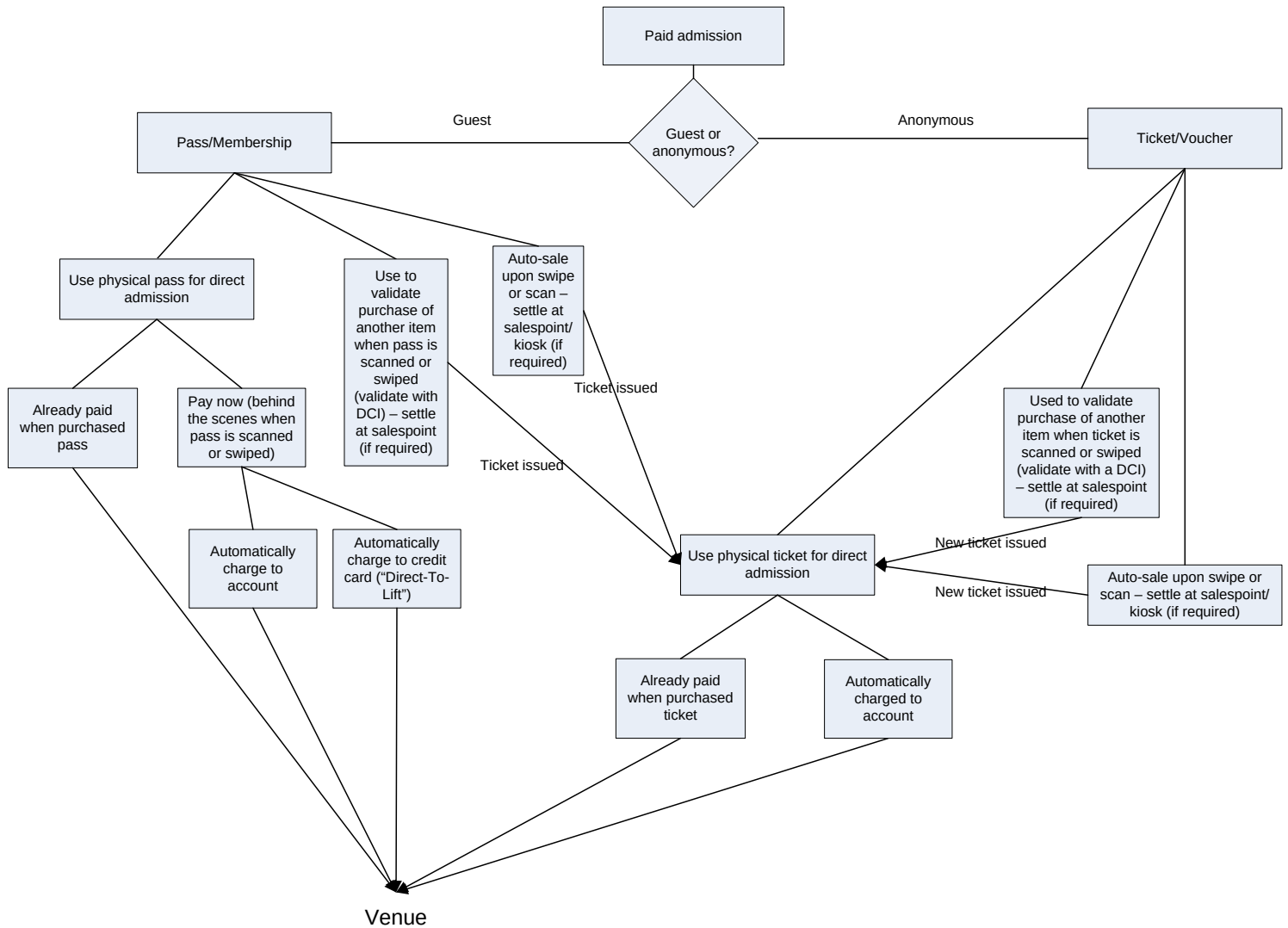
- Auto-validation – An operator scans a barcode or swipes a card which results in an action (auto-sale of an item in Sales or entrance to a restricted area with remote scanning tools). All rules for what to do with the values of the auto-validated ticket or pass are contained within the **Create Access Record** check box > **Template** button or **Create Pass** radio button > **Action Specifics** button.

Note: While it is certainly possible to use a standard Salesware salespoint running Sales to control access to a restricted area instead of using a ScanMan or GateKeeper solution, there are very few applications for this configuration because the cost of a salespoint is greater than that of a standard scanning solution.

- Validation with a DCI – An operator manually adds an item (validation product) to a sale, and then authorizes the purchase of the item (or discount) with the entry of a pass record. All rules for what to do with the values of the pass entered for the validation are contained within the **Validation Template** of the item requiring the validation.

Options for use

To demonstrate the range of options you have when using validating with a DCI and auto-validation, the following diagram shows possible combinations that can be used to provide admittance to a venue. The selection of which method to use depends on the requirements of your program.



Access record auto-validation (access template)

Access record (ticket) auto-validation for an item is configured from the **SysManager > Activities > DCIs > New/Edit > Action tab > Create Access Record** check box > **Template** button. Pass auto-validation is similar but configured in a separate area of the **Action** tab interface and is discussed in [Pass Auto-Validation \(pass action specifics\)](#). Passes and tickets are different in that a guest is always associated with a pass whereas no guest is required for a ticket.

Access record (ticket) auto-validation overview

Access record auto-validation programs involve the production of barcoded tickets that are scanned at remote locations in order to gain entrance *or* that are scanned in Sales in order to auto-sell other items. The configuration of

these types of programs occurs using the **Create Access Record > Template** button located on the **Action** tab of an item in SysManager. Sample programs include:

- Admission tickets
- Lift tickets
- Consignment vouchers

Access template configuration basics

Starting Values tab

The **SysManager > Activities > DCIs > New/Edit > Action** tab > **Create Access Record** check box > **Template** button > **Starting Values** tab sets the initial values of the ticket at the time of sale. This includes values such as **Access Product Is Valid** dates, **Total Uses**, **Points1**, **Points2**, **Money1** and **Money2**. The **Total Uses**, **Points** and **Money** fields can all be used to load value on the ticket; these are subsequently removed when the ticket is auto-validated. Any values configured on the **Starting Values** tab are stamped into the access record (ticket) at the time of sale and cannot be retroactively changed on existing access records by changing the configuration on the **Starting Values** tab for the access record DCI.

Note: See the *Salesware Memberships and Passes* document for information about the **Discount Level** spinner. See [Unit value programs \(validation with a DCI option\)](#) for information about the **Unit Value** check boxes.

Example:

An operator configures an item called 3 Day Entrance Ticket. The operator forgets to add 3 **Total Uses** to the **Starting Values** tab. Several hundred 3 Day Entrance tickets are sold before the operator realizes the configuration mistake. The operator edits the item and adds 3 total uses to the **Starting Values** tab, but this change only affects tickets that are sold after the change is saved. Existing 3 Day Entrance tickets do not have their total uses fields altered.

How to use the “good for” ticket option

The **SysManager > Activities > DCIs > New/Edit > Action** tab > **Access/Pass** template > **Starting Values** tab > **Create only one Access Record for quantities > 1** check box provides you with the ability to print a single ticket for a group.

Example:

A quantity of fifty group tickets sold on one line in Sales. One ticket is produced with one access record – the one access record is scanned and the quantity is used to set the admissions for that scan and to provide some sort of message to the operator/guest as to how many guests may pass through the entrance based on that scan. The ticket that prints also needs to show the total line item quantity for reference.

If an access ticket is set to ignore quantity (**SysManager > Activities > DCIs > New/Edit > Printing** tab > **Ignore Qty** check box is checked) and the **Create only one access record for quantities > 1** box is checked, the ticket is printed once when sold and the `access.good_for` field is filled in correctly with the quantity sold for that record.

To use the one scan per line item functionality:

1. In **SysManager > Activities > DCIs > New/Edit**:
 - a. In the **General** tab, the ticket needs to be set with one admission.
 - b. In the **Printing** tab, attached the layout that has the line to show **Good for...**

Note: To accommodate this, the layout has a line similar to this: `Good for '+' +ALLTRIM(STR(access->good_for,5,0))+ ' '+Visitor(s)`

- c. Also on the **Printing** tab, the box **Ignore Qty** needs to be checked.
 - d. In the **Action** tab, check the **Create Access Record** box.

Note: You can also use this functionality with passes.

- e. In the Access Template, check the **Create only one Access Record for quantities > 1** box
2. In Sales:
 - When the ticket is sold, the field `good_for` in the access record is filled in with correct quantity.
 - The ticket prints only one copy no matter what the quantity is.
 - The ticket shows the message, “Good for <quantity>”.
3. ScanMan/GateKeeper – This is where validations occur. When the operator scans a ticket or pass of this type, the message, “Good for <quantity>” displays on the symbol scanner or on the GateKeeper screen. The operator can then physically count the number of group members to match the sold quantity.

TICKETS / ADULT / 1DAY

Item Discounts		Remote Validation														
Starting Values	Global Settings	Auto Pass Validate	Auto Sales	Autosale Options												
Starting Values For New Access Products Access Product Is Valid: -- : : AM *ba Now BOD EOD Through -- : : AM *ba Now BOD EOD Total Uses 1 Discount Level 0 <table border="1"> <thead> <tr> <th></th> <th>Points</th> <th>Money</th> <th>Unit Value</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>0</td> <td>\$0.00</td> <td>☐</td> </tr> <tr> <td>2</td> <td>0</td> <td>\$0.00</td> <td>☐</td> </tr> </tbody> </table> ☐ Allow cascading validation of this access product ☐ Create only one Access Record for quantities > 1						Points	Money	Unit Value	1	0	\$0.00	☐	2	0	\$0.00	☐
	Points	Money	Unit Value													
1	0	\$0.00	☐													
2	0	\$0.00	☐													
				Save Cancel												

Global Settings tab

The **Global Settings** tab controls many actions associated with validation, both auto-validation and validation with a DCI. Basic restrictions for tickets are created on this tab such as day of week and valid time ranges for the ticket. Additional values such as weekly and daily values can be loaded onto a ticket using the **Global Settings** tab – although typically the daily and weekly uses are used in pass programs. Any configuration on the **Global Settings** tab affects all tickets of that DCI – both existing tickets and those yet to be sold.

Note: **Sales Screen action macro to execute when this item is validated** functionality is not active for access record items. The **Layout** and **Prefer** fields are described in the *Salesware Layouts* document.

Example:

An operator configures a ticket item called Nights-Only. Several hundred Nights-Only tickets are sold. The operator realizes that she forgot to restrict the validation time to 4:00 PM through 10:00 AM. The operator edits the **Global Settings** for the Nights-Only ticket DCI and adds the 16:00 - 22:00 time range. All Nights-Only tickets, including those already sold, are now be restricted to 4 PM to 10 PM.

TICKETS / ADULT / 1DAY

Item Discounts		Remote Validation	
Starting Values	Global Settings	Auto Pass Validate	Auto Sales
Global Setting For All Access Products Uses Per Day 0 Uses Per Week 0 ☒ Monday ☒ Tuesday ☒ Wednesday ☒ Thursday ☒ Friday ☒ Saturday ☒ Sunday Times : : ☐ Enforce time part of start/end date Black Out Dates -- -- -- -- -- -- Layout Prefer Revenue Recognition Rule ** No Revenue Recognition ** ☐ Create check point log entry when validating ☐ Allow "on-the-fly" discounting Sales Screen action to execute when this item is validated Full Validation - No Cascading			

Save

Cancel

Auto Pass Validate tab

The **Auto Pass Validate** tab is used to specify what actions are taken on the ticket (access record) values when auto-validated. Specify only the amount of value that is added or deducted per scan or per day. Additional options on this tab include the ability to set minimum delays between validations and resetting ticket valid dates based on the first scan/swipe. Any configuration on the **Auto Pass Validate** tab affects all tickets of that DCI – both existing tickets and those yet to be sold.

Note: More information about this tab can be found in the *Salesware Memberships and Passes* document.

Example:

An operator configures a 3 out of 5 Day Ticket. The operator adds 3 total uses to the **Starting Values** tab and deducts one use (-1) from the **Total Uses** field on the **Auto Pass Validate** tab because that is the number of uses that are deducted each day that the ticket is scanned.

TICKETS / ADULT / 1DAY

Item Discounts

Remote Validation

Starting Values Global Settings **Auto Pass Validate** Auto Sales Autosale Options

Total Uses: -1

Uses Per Week: 0

Uses Per Day: 0

Points 1: 0

Points 2: 0

Money 1: \$0.00

Money 2: \$0.00

☐ Flexible Dates Based On First Scan

☐ Do NOT increment the discount counter when an auto-validation is done

Block Access To Physical Locations

0 Through 0

Or

1
2
3
4
5
6

Access Delay: 0

Flex TimeSpan: 0

Save

Cancel

Auto Sales tab

The **Auto Sales** tab is where you select an item that is auto-sold whenever the ticket is auto-validated. This auto-sale can occur remotely via scanning applications such as GateKeeper and ScanMan or it can occur within the Sales application. Only one item may be selected for auto-sale per ticket DCI, although the item auto-sold can vary based on the time of day. The **Auto Sales** tab is frequently used in consignment programs. For a brief tutorial that demonstrates how to configure a consignment item, see the *Salesware User and Ticketing Guide for Beginning Users*.

The **After** fields allow a different item to be auto-sold based on the time of day that the pass auto-validation occurs. Time is entered in military time. The **Finalize Auto-Sale In Sales32** check box immediately finalizes a sale (without any operator action required) after the item specified on the **Auto Sales** tab is successful added to a sale with the scan/swipe of a valid item. Only check this box when a form of payment does not need to be selected or more items do not need to be added to the same sale.

Note: The “**Multiple Quantity**” **Auto Sale** functionality and the **Discount** functionality are not available for access record items.

Example:

A resort issues barcoded consignment vouchers to local hotels in the area. When a guest presents the consignment voucher to an operator, the operator scans the barcode on the voucher in order to auto-sell an entrance ticket.

The screenshot shows a software window titled "TICKETS / ADULT / 1DAY". It has a menu bar with "Item Discounts" and "Remote Validation". Below the menu bar are tabs: "Starting Values", "Global Settings", "Auto Pass Validate", "Auto Sales", and "Autosale Options". The "Autosale Options" tab is active. It contains two radio buttons: "Single Quantity" Auto Sale (selected) and "Multiple Quantity" Auto Sale. Below these are three columns of dropdown menus labeled "Department", "Category", and "Item". The "Department" column has three "After" labels and three dropdowns, all showing "MEMBERSHIP". The "Category" column has three dropdowns, all showing "MEMBERTKTS". The "Item" column has three dropdowns, showing "ADULT", "CHILD", and "GUEST". To the right of these columns is a checkbox labeled "Finalize Auto-Sale In Sales32". Below the dropdowns is a table with columns "Discount Level", "Flat Rate", and "%". The table has five rows, all with "0" in the "Flat Rate" column and "0.00" in the "%" column. To the right of the table are two radio buttons: "Never Reset" (selected) and "Reset At...". At the bottom right are "Save" and "Cancel" buttons.

Discount Level	Flat Rate	%
Discount Level 1	0	0.00
Discount Level 2	0	0.00
Discount Level 3	0	0.00
Discount Level 4	0	0.00
Discount Level 5	0	0.00

Autosale Options tab

The **Autosale Options** tab is used to specify what occurs when a ticket is scanned more than once in a single day (shift). This can be anywhere from performing all actions specified on the **Auto Pass Validate** and **Auto Sales** tabs *each* time the ticket is scanned in the same day (**Don't Use Shifts** option), only the *first time* the ticket is scanned in the same day (**Shift = 1 Day** option) or somewhere in between by selecting specific values to change upon subsequent scans (**Shift = 1 Day** with different values selected in the **Rules For Validating More Than Once Per Shift** section). Any configuration on the **Autosale Options** tab affects *all* tickets with that DCI – both existing tickets and those yet to be sold.

Example:

A 3 out of 5 Day ticket has one use *per day* deducted. The operator selects the **Shift = 1 Day** option on the **Autosale Options** tab for the ticket. If the operator had selected **Don't Use Shifts**, then the ticket would become invalid after 3 *scans*, not 3 days.

TICKETS / ADULT / 1DAY

Item Discounts Remote Validation

Starting Values Global Settings Auto Pass Validate Auto Sales Autosale Options

☒ **Shift = 1 Day** Shift = 1 Day means perform the actions specified on the "Auto Pass Validate" and "Auto Sales" tabs only the first time something is scanned in a day.

☐ **Don't Use Shifts** Don't use shifts means perform the actions specified on the "Auto Pass Validate" and "Auto Sales" tabs every time a pass is scanned - even multiple times per day.

☐ Do not AutoSale if pass is invalid when Trickle Validating

Rules For Validating More Than Once Per Shift
(These are exceptions to the Shift = 1 Day rule above)

☐ Process Total Uses ☐ Process Points 1 ☐ Process Money 1
☐ Process Weekly Uses ☐ Process Points 2 ☐ Process Money 2
☐ Process Daily Uses ☐ Process Discount Counter
☐ Write Transactions ☒ Write Use Logs

Save Cancel

Note: If auto-selling items (especially those that have a price associated with them) with remote scanning applications such as GateKeeper and ScanMan, it is important to check the **Do not AutoSale if pass is invalid when Trickle Validating** check box. All off-line scans are assumed to be valid (the guest is given the benefit of the doubt). When the scanner is back on-line, the scans collected while off-line “trickle” into SalesEZ application for actual validation. Those passes and tickets scanned while off-line that were bad still record as successful validations in the data because the guests were allowed entrance. This means that any Auto Sales configured for the ticket normally also take place for invalid scans. In order to prevent the auto-sale for invalid trickled scans, check the box.

The following table provides a list of the “process” and “write” check boxes available on the bottom half of the **Autosale Options** tab along with descriptions of their functions. These are used to configure the exceptions when the **Shift = 1 Day** radio button is selected, providing a finer granularity of control with the **Shift = 1 Day** setting.

Check box	Definition
Process Total Uses	If using the Shift = 1 Day option, perform the action configured on the Auto Pass Validate tab for Total Uses every time the pass or ticket is scanned, not just the first time the pass or ticket is scanned in the same day.

Process Weekly Uses	If using the Shift = 1 Day option, perform the action configured on the Auto Pass Validate tab for Weekly Uses every time the pass or ticket is scanned, not just the first time the pass or ticket is scanned in the same day.
Process Daily Uses	If using the Shift = 1 Day option, perform the action configured on the Auto Pass Validate tab for Daily Uses every time the pass or ticket is scanned, not just the first time the pass or ticket is scanned in the same day.
Process Points 1	If using the Shift = 1 Day option, perform the action configured on the Auto Pass Validate tab for Points 1 every time the pass or ticket is scanned, not just the first time the pass or ticket is scanned in the same day.
Process Points 2	If using the Shift = 1 Day option, perform the action configured on the Auto Pass Validate tab for Points 2 every time the pass or ticket is scanned, not just the first time the pass or ticket is scanned in the same day.
Process Money 1	If using the Shift = 1 Day option, perform the action configured on the Auto Pass Validate tab for Money 1 every time the pass or ticket is scanned, not just the first time the pass or ticket is scanned in the same day.
Process Money 2	If using the Shift = 1 Day option, perform the action configured on the Auto Pass Validate tab for Money 2 every time the pass or ticket is scanned, not just the first time the pass or ticket is scanned in the same day.
Process Discount Counter	If using the Shift = 1 Day option, increment the Discount Counter every time the pass or ticket is scanned, not just the first time the pass or ticket is scanned in the same day.
Write Transactions	If using the Shift = 1 Day option, do the auto-sale action configured on the Auto Sales tab each time the pass or ticket is scanned, not just the first time that the pass or ticket is scanned in a single day.
Write Use Logs	If using the Shift = 1 Day option, write a use log into the gst_actv table each time the pass or ticket is scanned in order to record all scan activity in a day, not just the first scan that occurred in the day.

Item Discounts tab

Not used for access items.

Remote Validation tab

The **Remote Validation** tab is used only when multiple sites share programs. This tab can be used to limit what programs are shared. Any configuration on the **Remote Validation** tab affects all tickets of that DCI – both existing tickets and those yet to be sold. See the [Site Restrictions](#) and [WAN Validation](#) sections.

Access template (ticket) sample programs

This section presents three sample access template (ticket) programs. For more examples, see the tutorials in the *Salesware User and Ticketing Guide for Beginning Users* and the Salesware training site (<http://www.siriusware.com/training>).

Program 1: 3 out of 5 day lift ticket

Program benefits/rules

- Ticket may be used for lift access for three days out of a five day period.
- Ticket is scanned directly at the lift.

Configuration

- **Starting Values** tab
 - **Pass Is Valid** dates are blank – **Time Span** on the **General** tab is set to 5 days in order to dynamically set the valid dates of the ticket based on the start date assigned at the time of sale.
 - **Total Uses** field is set to 3 (could alternatively use **Points1**, **Points2**, **Money1** or **Money2**).
- **Global Settings** tab - nothing
- **Auto Pass Validate** tab
 - -1 is entered for **Total Uses**.
 - **Access Delay** is set to ten minutes as that is the absolute fastest amount of time that a guest could ride a lift and get back down to the bottom.
- **Auto Sales** tab – nothing
- **Autosale Options** tab
 - Operator selects **Shift =1 Day** because the ticket may be scanned multiple times in a single day. If **Don't Use Shifts** was selected, the 3 out of 5 day ticket would become invalid after only three scans at the lift.
 - **Write Use Logs** is checked in order to record scan activity each time a 3 out of 5 Day Lift Ticket is scanned even if values are not deducted with subsequent scans of the same ticket in the same day.
- **Item Discounts** tab – nothing

- **Remote Validation** tab – nothing

Program 2: 2 Consecutive day tickets given away at trade shows prior to opening day

Program benefits/rules

- Valid between 01/15/2013 and 05/31/2013.
- Must be used for two consecutive days within the specified valid dates.
- Hundreds of these tickets are given away at trade shows months before opening day.
- Tickets may be taken directly to the entrance.

Configuration

- **Starting Values** tab
 - **Valid Dates** are set to 01/15/2013 through 05/31/2013.
 - Optional: **Total Uses** can be set to **2**. This is optional because the ticket is only good for 2 consecutive days. So, deducting 2 uses over the course of 2 days is redundant.
- **Global Settings** tab – nothing
- **Auto Pass Validate** tab
 - **Flexible Dates Based On First Scan** box is checked and **2** is entered for the **Flex TimeSpan** next to this box.
 - Optional: **-1** is entered for **Total Uses** if **Total Uses** were entered on the **Starting Values** tab.
- **Auto Sales** tab – nothing
- **Autosale Options** tab
 - If loading and deducting total uses, the operator selects **Shift = 1 Day** because the ticket may be scanned multiple times in a single day. (If **Don't Use Shifts** was selected the 2 consecutive days ticket would become invalid after only 2 scans.)
 - **Write Use Logs** is checked in order to record scan activity each time a 2 Consecutive Day ticket is scanned even if values are not deducted with subsequent scans of the same ticket in the same day.
- **Item Discounts** tab – nothing
- **Remote Validation** tab – nothing

Program 3: Consignment vouchers

Program benefits/rules

- Valid between 5/15/2013 and 9/30/2013.
- Auto-sells a 1 Day Adult Entrance item when scanned in Sales.

- Can only be used 1 time total.
- Vouchers are issued to local area hotels several weeks before the summer season begins.

Configuration of program

- **Starting Values** tab
 - **Valid Dates** are set to 5/15/2013 through 09/30/2013
 - **Total Uses** field is set to **1**
- **Global Settings** tab – nothing
- **Auto Pass Validate** tab
 - **-1** is entered for **Total Uses**
- **Auto Sales** tab
 - Operator selects the item to be auto-sold when the Consignment Voucher is scanned in Sales.
- **Auto Sales Options** tab
 - Operator selects **Don't Use Shifts** in order to trigger the auto-sale and subsequent deduction of the total use *each time* the consignment voucher is scanned. This prevents the same consignment voucher from being used more than once.
- **Item Discounts** tab – nothing
- **Remote Validation** tab – nothing

Pass auto-validation (pass action specifics)

Pass auto-validation for an item is configured from the **SysManager** > **Activities** > **DCIs** > **New/Edit** > **Action** tab > **Create Pass** radio button > **Action Specifics** button. Ticket auto-validation is similar but is configured in a separate part of the **Action** tab interface and is discussed in [Access record auto-validation \(access template\)](#). Passes and tickets are different in that a guest is always associated with a pass where no guest is required for a ticket.

Pass auto-validation overview

Pass auto-validation programs involve giving a guest (or an employee) a barcoded and/or magswipe encoded pass that is scanned at remote locations in order to gain entrance *or* is scanned/swiped in Sales in order to auto-sell an item. These passes can also be scanned/swiped in Sales to automate the application of discounts. The configuration of these types of programs occurs within the **Action Specifics for Passes** located on the **Action** tab of an item in SysManager. Sample programs include:

- Membership cards
- Season passes

- Employee passes
- Multiple use passes

Pass Action Specifics configuration basics

Note: For detailed information regarding the configuration of pass programs, see the *Salesware Memberships and Passes* document.

Starting Values tab

The **SysManager** > **Activities** > **DCIs** > **New/Edit** > **Action** tab > **Create Pass** radio button > **Action Specifics** button > **Starting Values** tab sets the initial values of the pass at the time of sale. This includes values such as **Pass Is Valid** dates, **Total Uses**, **Points1**, **Points2**, **Money1** and **Money2**. The **Total Uses**, **Points** and **Money** fields can all be used to load value on the pass; this value is subsequently removed when the pass is auto-validated or validated with a DCI. This is also the tab where you configure the system to assign a sixteen digit card number to the pass record at the time of sale for use in programs such as In-House Cards (a.k.a., Debitware). Any values configured on the **Starting Values** tab are stamped into the pass record at the time of sale and cannot be retroactively changed on existing pass records by changing the configuration on the **Starting Values** tab for the pass DCI. For information about **Validate parent instead of this**, see [Parent pass validation \(auto validation option\)](#).

Note: See the *Salesware Memberships and Passes* document for information about the **Discount Level** spinner. See [Unit value programs \(validation with a DCI option\)](#) for information about the **Unit Value** check boxes.

Note: **Create a DirectNet account when sold** is no longer used.

Example:

An employee pass is loaded with 5 points at the time of sale. The employee pass item must be configured with 5 points on the **Starting Values** tab prior to selling any employee passes. If no points are configured on the employee pass item's **Starting Values** tab, then all employee passes sold while the **Points** were set to **0** has **0** points. Changing the starting values on the employee pass item to 5 *after* employee passes have already been sold does *not* update the existing employee passes with 5 points. Instead, each pass that was sold when **Points** were set to **0** must be manually updated by looking up the pass records in SysManager.

PASSES / EMPLOYEE / DPTHEADS

Item Discounts Remote Validation DebitWare

Starting Values Global Settings Auto Pass Validate Auto Sales Autosale Options

Starting Values For New Passes

Pass Is Valid

2013-11-01 12:00:00 AM Through 2014-03-31 12:00:00 AM

Fri Now BOD EOD Mon Now BOD EOD

Total Uses	Discount Level	Points	Money	Unit Value
0	0	1 10	\$0.00	☐
		2 0	\$0.00	☐

☐ Validate parent instead of this
Parent is determined by: ☒ Parent Guest ☐ Master Pass No

☒ Assign number from basket 0 (num_source)

☐ Create a DirectNet account when sold

☐ Create only one Access Record for quantities > 1

Save Cancel

Global Settings tab

The **Global Settings** tab controls many actions associated with validation, both auto-validation and validation with a DCI. Basic restrictions for passes are created on this tab such as day of week and date range blackout periods. Additional values such as weekly and daily values can be loaded onto a pass within the **Global Settings** tab. Any configuration on the **Global Settings** tab affects *all* passes of that DCI – both existing passes and those yet to be sold.

Example:

An operator configures a Weekdays Only pass program. Several hundred Weekdays Only passes are sold. The operator realizes that she forgot to restrict the validation to Monday - Friday. The operator edits the **Global Settings** tab for the Weekdays Only pass DCI and un-checks the **Saturday** and **Sunday** check boxes. All Weekday Only passes, including those already sold, are now be restricted to Monday - Friday use.

The **Global Settings** tab also is the area used to automate discounting in Sales with the swipe/scan of a pass. Automated discounting uses the macro **SELECTIVESPECIAL ()** for those specials specifically linked to certain items or **GLOBALSPECIAL ()** for those specials configured as Global Specials. The macro **IGNOREERRORS ()** always precede the special macros in order to prevent a message to the operator each time a special cannot be applied to an item in the sale (see [Applying Specials and/or Discounts](#) for step-by-step

Auto Pass Validate tab

The **Auto Pass Validate** tab is used to specify what actions are taken on the pass values when auto-validated (not when validated with a DCI). Remember to specify only the amount of value that are added or deducted per scan/swipe or per day. Additional options on this tab include the ability to set minimum delays between validations and resetting pass valid dates based on the first scan/swipe. Any configuration on the **Auto Pass Validate** tab affects *all* passes of that DCI – both existing passes and those yet to be sold.

Example:

An operator configures a fifteen use pass. The operator adds fifteen total uses to the **Starting Values** tab and deducts one use (-1) from the **Total Uses** option on the **Auto Pass Validate** tab because this is the number of uses that are deducted each day that the pass is scanned.

Auto Sales tab

The **Auto Sales** tab provides two separate dialogs, selected using the “**Single Quantity**” **Auto Sale** and “**Multiple Quantity**” **Auto Sale** radio buttons. Multiple quantity Auto Sales are documented in the *Salesware Memberships and Passes* document.

The **Auto Sales** tab with the “**Single Quantity**” **Auto Sale** radio button selected is the place to select an item that is auto-sold whenever the pass is auto-validated. This auto-sale can occur remotely via scanning applications such as GateKeeper and ScanMan or it can occur within the Sales application. Only one item may be selected for auto-sale per pass DCI, although the item auto-sold can vary based on the time of day. The **Discount** functionality can be used in conjunction with Auto Sales in order to discount the auto-sold item at certain intervals. Any configuration on the **Auto Sales** tab affects *all* passes of that DCI – both existing passes and those yet to be sold.

Example:

A frequent use card is presented to an operator. When this card is auto-validated (scanned or swiped) in Sales between 9 AM and noon, a 1 Day Adult ticket is auto-sold. When the card is auto-validated (scanned or swiped) in Sales from 12:01 PM – 5 PM, a ½ Day Adult ticket is auto-sold. The seventh time this happens, the ticket that is auto-sold is discounted by 100% and the “counter” is reset to start the process over again.

PASSES / EMPLOYEE / DPTHEADS

Item Discounts Remote Validation DebitWare

Starting Values Global Settings Auto Pass Validate Auto Sales Autosale Options

☒ "Single Quantity" Auto Sale ☐ "Multiple Quantity" Auto Sale

	Department	Category	Item	
After :	TICKETS	ADULT	1DAY	☐ Finalize Auto-Sale In Sales32
After :	TICKETS	ADULT	HALF-PM	
After :				

	Flat Rate	%	
Discount Level 1	7	\$0.00	☒ Never Reset
Discount Level 2	0	\$0.00	☐ Reset At...
Discount Level 3	0	\$0.00	☐
Discount Level 4	0	\$0.00	☐
Discount Level 5	0	\$0.00	☐

Save Cancel

Autosale Options tab

The **Autosale Options** tab is used to specify what happens when a pass is scanned more than once in a single day (shift). This can be anywhere from doing all actions specified on the **Auto Pass Validate** and **Auto Sales** tabs *each* time the pass is scanned in the same day (**Don't Use Shifts** option), only the *first time* the pass is scanned in the same day (**Shift = 1 Day** option) or somewhere in between by selecting specific values to change upon subsequent scans (**Shift = 1 Day** with different values selected in the **Rules For Validating More Than Once Per Shift** section). Any configuration on the **Autosale Options** tab affects *all* passes of that DCI – both existing passes and those yet to be sold.

Example:

A membership card is valid for 365 days from purchase. Each *day* that the membership card is scanned at the entrance and a \$0 Membership Day Use ticket is auto-sold. This allows the business to track its annual usage of membership cards. Because the Membership Day Use product is only sold the first time a valid member pass is scanned in a day, the operator selects the **Shift = 1 Day** option and checks the **Do not AutoSale if pass is invalid when Trickle Validating** check box.

PASSES / EMPLOYEE / DPTHEADS

Item Discounts		Remote Validation		DebitWare	
Starting Values		Global Settings		Autosale Options	

☒ Shift = 1 Day	Shift = 1 Day means perform the actions specified on the "Auto Pass Validate" and "Auto Sales" tabs only the first time something is scanned in a day.
☐ Don't Use Shifts	Don't use shifts means perform the actions specified on the "Auto Pass Validate" and "Auto Sales" tabs every time a pass is scanned - even multiple times per day.

☐ Do not AutoSale if pass is invalid when Trickle Validating

Rules For Validating More Than Once Per Shift
(These are exceptions to the Shift = 1 Day rule above)

☐ Process Total Uses	☐ Process Points 1	☐ Process Money 1
☐ Process Weekly Uses	☐ Process Points 2	☐ Process Money 2
☐ Process Daily Uses	☐ Process Discount Counter	
☐ Write Transactions	☒ Write Use Logs	

Note: If auto-selling items (especially those that have a price associated with them) with remote scanning applications such as GateKeeper and ScanMan, it is important to check the **Do not AutoSale if pass is invalid when Trickle Validating** check box. All off-line scans are assumed to be valid (the guest is given the benefit of the doubt). When the scanner is back on-line, the scans collected while off-line “trickle” into SalesEZ application for actual validation. Those passes and tickets scanned while off-line that were bad still record as successful validations in the data because the guests were allowed entrance. This means that any Auto Sales configured for the ticket normally also take place for invalid scans. In order to prevent the auto-sale for invalid trickled scans, check the box.

Item Discounts tab

The **Item Discounts** tab allows items configured with validation templates (**Action** tab > **Validation** section) to be “assigned” to the pass; this allows various discount macros to be configured per “assigned” item. This creates the ability for the same pass type to validate many different items (validation products) and execute different actions based on the item being validated. Typically, this involves variable discounting (varying application of different specials) based on the item being validated. See [Validation with a DCI \(validation template\) and validation products](#) for more details.

Remote Validation tab

The **Remote Validation** tab is used only when multiple sites share programs. This tab can be used to limit what programs are shared. Any configuration on the **Remote Validation** tab affects all passes of that DCI – both existing passes and those yet to be sold. See the [Site Restrictions](#) and [WAN Validation](#) sections.

Debitware tab

This tab is used for specific configuration for passes used in In-House Cards programs. See the *Salesware In-House Cards* document for more details.

Pass auto-validation sample programs

Program 1: Membership cards

Program benefits/rules

- Valid 365 days from purchase.
- Scanned at the entrance point to the museum with a Symbol scanner.
- Membership card use is tracked with the auto-sale of a \$0 item that is configured with one admission.
- Swiped in Sales to discount retail book purchases by 15%.
- Offers ten free tickets to be used by family or friends.
- Blacked-out between May 1 and May 14, 2013 when the facility is undergoing renovations.

Configuration

- **Starting Values** tab
 - **Pass Is Valid** dates are blank – **Time Span** on **General** tab is set to **365** days in order to dynamically set the valid dates of the pass based on the start date assigned at the time of sale.
 - **Points1** is set to **10** (could alternatively use **Total Uses**, **Points2**, **Money1** or **Money2**).
- **Global Settings** tab
 - Blackout date range of 5/1/2013 through 5/14/2013 is entered.
 - Appropriate pass layout is selected for functionality required of the pass (see [Barcodes and magswipes](#)).
 - **Sales Screen actions to execute when this item is validated** –
IGNOREERRORS() SELECTIVESPECIAL("RETAILBOOK")
 - **Check for Void and Date Range** is selected from the dropdown.

- **Auto Pass Validate** tab
 - Nothing is configured on this tab because there are no values to be deducted when the pass is scanned with the symbol scanner. The ten “free family and friend” tickets are redeemed when an operator first adds an item to a sale, and then enters the member pass number for authorization (validation with a DCI process).
- **Auto Sales** tab
 - Operator selects an item called Membership Use in the first row of dropdown DCI boxes. The Membership Use item is a \$0 item configured with **1** admission that is auto-sold each *day* a member pass is scanned.
- **Auto Sales Options** tab
 - Operator selects **Shift = 1 Day** because a member pass may be scanned more than once in a single day and the museum only wants the Membership Use item to be auto-sold *once per day per member pass* used.
 - **Write Use Logs** is checked in order to record scan activity each time a member pass is scanned even if values are not deducted or items are not auto-sold with subsequent scans of the same pass in the same day.
- **Item Discounts** tab – nothing
- **Remote Validation** tab – nothing
- **Debitware** – nothing

Program 2: 15-day ski pass

Program benefits/rules:

- Valid for fifteen days between 11/15/2013 and 04/15/2014.
- Blacked-out between 12/21/2013 and 1/6/2014.
- Offers a 10% discount on all Cafeteria items.
- Operator scans the pass barcode in Sales in order to auto-sell a \$0 1-Day Ticket that is presented at the lift.
- Can only be used one time per day.

Configuration:

- **Starting Values** tab
 - **Valid Dates** are set to 11/15/2013 through 04/15/2014.
 - **Total Uses** field is set to **15** (could alternatively use **points1**, **points2**, **money1** or **money2**).
- **Global Settings** tab
 - **Daily Uses** field is set to **1**.

- Blackout date range of 12/21/2013 through 1/6/2014 is entered.
- Appropriate pass layout is selected for functionality required of the pass (see [Barcodes and magswipes](#)).
- **Sales Screen actions to execute when this item is validated** –
IGNOREERRORS() GLOBALSPECIAL("FOOD-CAF ")
- **Check for Void and Date Range** is selected from dropdown.
- **Auto Pass Validate** tab
 - -1 is entered for **Total Uses**.
 - -1 is entered for **Daily Uses**.
- **Auto Sales** tab
 - Operator selects the **1-Day Ticket** item in the first row of dropdown DCI boxes. (The 1-Day Ticket item is a \$0 item configured with 1 admission that is auto-sold each time the 15-Day Ski Pass is scanned.)
- **Auto Sales Options** tab
 - Operator selects **Don't Use Shifts** in order to trigger the auto-sale and subsequent deduction of 1 total use and 1 daily use *each time* the 15-Day Ski Pass is scanned. This prevents the pass holder from going to multiple salespoints in the same day in an attempt to get more than one ticket on the same day. The system tries to deduct 1 total use and 1 daily use each time the pass is scanned (auto-validated) in Sales. Because there is only one use allowed per day, the auto-validation fails in subsequent attempts using the same pass in the same day.
- **Item Discounts** tab – nothing
- **Remote Validation** tab – nothing
- **Debitware** tab – nothing

Program 3: 5th day free water park pass

Program benefits/rules:

- Valid between 5/15/2013 and 9/30/2013.
- Auto-sells a full price 1 Day Adult Entrance item when scanned/swiped in Sales.
- Every fifth use the 1 Day Adult Entrance ticket is discounted by 100%.
- Can only be used 1 time per day.

Configuration:

- **Starting Values** tab
 - **Valid Dates** are set to 5/15/2013 through 09/30/2013
- **Global Settings** tab

- **Daily Uses** field is set to **1**.
- Appropriate pass layout is selected for functionality required of the pass (see [Barcodes and magswipes](#)).
- **Auto Pass Validate** tab
 - **-1** is entered for **Daily Uses**.
- **Auto Sales** tab
 - Operator selects the full price **1-Day Adult Entrance** item in the first row of dropdown DCI boxes.
 - The operator enters **5** for **Discount Level 1**, enters **100%** for the % discount and selects the **Reset At...** radio button next to the **Discount Level 1** line.
- **Auto Sales Options** tab
 - Operator selects **Don't Use Shifts** in order to trigger the auto-sale and subsequent deduction of a daily use *each time* the 5th Day Free pass is auto-validated. This prevents the pass holder from going to multiple salespoints in the same day in an attempt to build up the discount counter in order to get more free tickets. The system tries to deduct a daily use each time the pass is scanned (auto-validated) in Sales. Because there is only one use allowed per day, the auto-validation fails in subsequent attempts using the same pass in the same day.
- **Item Discounts** tab – nothing
- **Remote Validation** tab – nothing
- **Debitware** tab – nothing

Validation with a DCI (validation template) and validation products

Validation with a DCI overview

Validation with a DCI involves the process of authorizing the sale or discount of an item (validation product) with a pass record. It also includes the concept of reward programs where pass holders may accumulate points/uses to be redeemed once enough value is accumulated. This type of validation occurs in Sales and always begins with the operator adding an item (validation products) to a sale, and then using the pass record to authorize the purchase or application of a discount. The configuration of these types of programs occurs within the **Validation Template** located on the **Action** tab of an item (**SysManager** > **Activities** > **DCIs** > **New/Edit** > **Action** tab > **Validation** section > **Template** button). Sample programs include:

- Membership guest tickets
- Employee family/friend tickets
- Pass holder discounts on various products
- Frequent use cards

Validation template (validation product) configuration

Forced vs. optional validation

An item may be configured to force validation or it may be configured with optional validation. Forced validation requires the entry of a valid pass record (loaded with the necessary value) in order to finalize the sale. Optional validation allows a sale to be finalized even if the pass record entered is not valid. Forced vs. optional validation can be specified for both the sale and the return of an item. Generally speaking, programs that force validation involve offering discounts to pass holders and programs that allow optional validation involve reward programs that allow the pass holder to accumulate value.

Specials that force validation

An optional configuration for Specials (**SysManager > Activities > Financial Lists > Specials**) is to **Force validation when applied**, as shown in the following screen capture.

The screenshot shows the 'Special' configuration window. The 'Name' field is 'MEMBERSHIP' and the 'Description' is 'GENERAL MEMBERSHIP DISC.'. The 'General' tab is selected. The 'Min Security To Sell' is 0. The 'Discount' is 100.00%. The 'Set Final Price' is \$0.00. The 'Dynamic Rule' is '** No Dynamic Special Rule **'. The 'Adjust To' is 0.00. The 'Force validation when applied (requires optional validation on the item)' checkbox is checked and highlighted with a red box. The 'Save' and 'Cancel' buttons are at the bottom right.

To set up this type of validation program, the item that may be discounted by the special *must be set up with **Optional** validation*. When sold, if the item is discounted by a special configured to **Force validation when applied**, the operator is not able to finalize the sale until a valid pass number is entered for the item. If a special is

not applied to the item (or the special applied is not configured to force validation) the operator is able to finalize the sale without entering a valid pass number.

The key in this program is to set up the items that are eligible for the discounts with **Optional** validation. If the items are set up with **None** selected for **Validation**, then applying a special that forces validation when applied has no effect whatsoever. The operator is able to finalize the sale with the special applied without entering a valid pass number for the item.

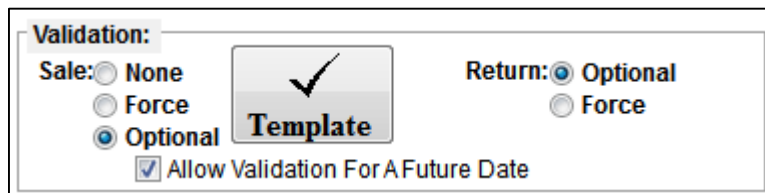
There are additional options for applying specials when pass numbers are entered for validation by using the Discount Macro found on the **Item/Pass Relationships** tab within the Validation Template. (See the [Item/Pass Relationships](#) Tab section below for more information.)

Deducting/adding value

The value to deduct or add to a pass is configured on the **Validation** tab within the **Validation Template**. The **Uses/Points/Money** specified here is deducted or added to a pass record *every time* a pass is entered for validation – regardless if it is the first or fiftieth time that the same pass number has been entered for validation within the same day.

Note: This is a big difference from auto-validation where the addition or subtraction of values on first vs. subsequent scans may be specified.

Validation Templates that deduct a daily use can actually be validated more than once on the same day even if only a single use per day is specified. This can be done if item's start date in Sales is set to future dates for subsequent uses. Once a "future" daily use has been redeemed, any validation for that same future date using the same pass fails. To turn this option on for an item, the **Allow Validation For A Future Date** option must be checked.



The screenshot shows a 'Validation:' configuration window. It contains three radio button options for 'Sale': 'None', 'Force', and 'Optional', with 'Optional' selected. To the right of these is a 'Template' button with a checkmark icon. Further right are two radio button options for 'Return': 'Optional' and 'Force', with 'Optional' selected. At the bottom, there is a checked checkbox labeled 'Allow Validation For A Future Date'.

This future validation can be limited to just next day sales or it can be allowed for *any* future date. To limit the future validation functionality to *only* next day sales, go to **SysManager > Preferences > Passes** and un-check the **Allow validations more than one day in advance** check box.

Pass Preferences

When validating with uses per week

New Week Starts
Sunday

For "Valid On" reporting, use this calculation method:

☒ Admissions (front loaded)
☐ Admissions or Time Span
☐ Time Span (% spread)

☒ Allow validations more than one day in advance

Swipe Option Original Swipe: "B1111222233334444=0203101100001311?"

☒ Card number only "1111222233334444"
☐ Include Prefix "B1111222233334444"
☐ Include Exp date "B1111222233334444*0203"
☐ Exp Date w/no prefix "1111222233334444*0203"

Save
Cancel

Additional options

Additional configuration options on the **Validation** tab include **Multiple validations**, **Do NOT increment the discount counter** and **Access Delay**.

Multiple validations is helpful when the same pass record may be entered multiple times on the same line item in a sale to authorize purchases.

Example:

An employee pass has 5 points that may be used to get free tickets for family and friends. All five free tickets may be picked up at the same time. By checking the **Multiple validations** box on the validation template of the free ticket, the operator can set the quantity of the line item to be greater than one and only enter the employee pass number one time (per line item.)

Do NOT increment the discount counter is helpful when using the **Discount** counter functionality in auto-validation programs (see the [Pass Action Specifics configuration basics](#) section, [Auto Sales tab](#) subsection) and wanting to use the same pass DCI to validate the purchase or discount of items via the **Validation Template**.

Example:

A 5th Day Free program uses the auto-validation **Discount** counter functionality to auto-sell full price entrance tickets until the fifth purchase, which is discounted to \$0. The same 5th Day Free pass can be used to validate the sale of a discounted parking pass. The guest does not have the discounted parking pass purchase count towards their free entrance ticket, so the parking pass validation template is configured with the **Do NOT increment the discount counter** box checked.

The **Access Delay** option can prevent the same pass number from being entered for validation within the specified time period (in minutes). The validation template access delay function is similar to the access delay option used in auto-validation programs within the **Create Access Record > Template** and **Create Pass > Action Specifics**.

The screenshot shows a software window titled "TICKETS / ADULT / 1DAY". It has two tabs: "Validation" (selected) and "Item / Pass Relationships". The "Validation" tab contains several input fields and checkboxes. On the left, there are three stacked input fields for "Total Uses" (0), "Uses Per Week" (0), and "Uses Per Day" (-1). Below these are two stacked input fields for "Points 1" (1) and "Points 2" (0). Further down are two stacked input fields for "Money 1" (\$0.00) and "Money 2" (\$0.00). At the bottom left, there are two checkboxes: "Multiple validations" (unchecked) and "Do NOT increment the discount counter" (checked). On the right side of the "Validation" tab, there are two checkboxes: "Ignore Blackout Dates" (unchecked) and "Ignore Days Of Week" (unchecked). Below these is an "Access Delay" input field (0) and an "Extend expiration date (days)" input field (0). At the bottom right of the "Validation" tab is a "Round to end-of-month" checkbox (unchecked). The "Item / Pass Relationships" tab is currently empty. At the bottom right of the window are two buttons: "Save" and "Cancel".

Item/pass relationships functionality

The **Item/Pass Relationships** tab serves two functions:

- 1. Restricts the passes that can be used to validate the item (versus allowing any pass with the necessary values to validate the item).
- 2. Applies various discount macros based on the pass DCI used for validation.

These functions are described in the following sections.

Restricting validation to certain passes

Restricting validation to only certain passes allows more control over validation programs. Values on passes can vary in their use even though the different pass items may be loaded with the same “type” of value (e.g., more than one pass DCI is loaded with points in the **Points1** field).

Example:

Guests who own Adult Unlimited passes may receive discounts on five lessons throughout the season. The Adult Unlimited is loaded with 5 points in the **Points1** field. The lesson item validation template deducts 1 point from the **Points1** field. The **Item/Pass Relationship** tab lists the Adult Unlimited pass in the **Assigned passes** window and restricts all other passes from validating it.

Employees may receive five free tickets throughout the season. The Employee Pass is loaded with 5 points in the **Points1** field. The ticket item validation template deducts 1 point from the **Points1** field. The **Item/Pass Relationship** tab lists the Employee Pass in the **Assigned passes** window and restricts all other passes from validating it.

This configuration prevents Employee Passes from receiving discounted lessons and prevents the Adult Unlimited Passes from receiving free tickets even though both pass items were loaded with the same amount of value within the same field.

✓ TICKETS / ADULT / 1DAY

Validation | **Item / Pass Relationships**

☒ Restrict validation to only the following pass types

Available passes

- [miscrdprg, resortchg, resortchg] EZ Charge C
- [miscrdprg, sharedvalu, linkedpass] Linked Pa
- [miscrdprg, sharedvalu, masterpass] Master P
- [miscrdprg, unitvalue, uv5daypass] Unit Value
- [passes, employee, dptheads] Department Hea
- [passes, limited, 15daypass] 15 Day Pass
- [passes, limited, weekday] Weekday Only Pass
- [passes, unlimited, adtunlmt] Adult Unlimited Pa
- [passes, unlimited, snrunlmt] Senior Unlimited F
- [passes, unlimited, ythunlmt] Youth Unlimited P
- [tickets, adult, 1day] 1 Day Adult Ticket
- [tickets, adult, 2day] 2 Day Adult Ticket

Assigned passes

- [miscrdprg, discrdprg, discard] Discount Ca
- [passes, employee, employee] Employee Pass
- [passes, limited, 1dayperwk] 1 Day Per Week P

Discount macro for assigned item:

Save Cancel

Discounts based on the pass used for validation

The second piece of functionality available within the **Item/Pass Relationships** tab is the ability to apply Sales screen action macros to an item based on the pass entered for the validation. (For more information on Sales screen action macros, see the *Salesware Dynamic Pricing* document.) This allows a single item to be validated by many types of passes and have a different discount applied to the item based on the type of pass entered for the validation. There are three basic functions available:

3. Applying specials and/or discounts (SPECIAL macro).

4. Checking point values and applying specials based on the point value, and then resetting points (CHECKPOINTS macro).
5. Checking point values and applying specials at regular point intervals (EVERYX macro).

These functions are described in the following sections.

Applying specials and/or discounts

This option applies a special or discount to the item upon a successful validation. In the following example, three pass types apply varying discounts to the same item based upon a successful validation:

The screenshot shows a software window titled "TICKETS / ADULT / 1DAY". It has two main panes: "Validation" on the left and "Item / Pass Relationships" on the right. In the "Validation" pane, there is a checkbox labeled "Restrict validation to only the following pass types" which is unchecked. Below it is a list of "Available passes" including various ticket and pass types. In the "Item / Pass Relationships" pane, there is a list of "Assigned passes" which includes "Discount Ca", "Employee Pass", and "1 Day Per Week P". The "Employee Pass" entry is highlighted with a red box. At the bottom of the window, there is a field labeled "Discount macro for assigned item:" with the text "SPECIAL('25% '" entered. To the right of this field are "Save" and "Cancel" buttons.

Validation		Item / Pass Relationships	
☐ Restrict validation to only the following pass types			
Available passes [miscrdprg, resortchg, resortchg] EZ Charge C [miscrdprg, sharedvalu, linkedpass] Linked Pa [miscrdprg, sharedvalu, masterpass] Master P [miscrdprg, unitvalue, uv5daypass] Unit Value [passes, employee, dptheads] Department Hea [passes, limited, 15daypass] 15 Day Pass [passes, limited, weekday] Weekday Only Pass [passes, unlimited, adtunlmt] Adult Unlimited Pa [passes, unlimited, snrunlmt] Senior Unlimited F [passes, unlimited, ythunlmt] Youth Unlimited P [tickets, adult, 1day] 1 Day Adult Ticket [tickets, adult, 2day] 2 Day Adult Ticket	[miscrdprg, discrdprg, discard] Discount Ca [passes, employee, employee] Employee Pass [passes, limited, 1dayperwk] 1 Day Per Week P		
Discount macro for assigned item: SPECIAL('25% '"		Save Cancel	

✓ TICKETS / ADULT / 1DAY

Validation

☐ Restrict validation to only the following pass types

Available passes

- [miscrdprg, resortchg, resortchg] EZ Charge C
- [miscrdprg, sharedvalu, linkedpass] Linked Pa
- [miscrdprg, sharedvalu, masterpass] Master P
- [miscrdprg, unitvalue, uv5daypass] Unit Value
- [passes, employee, dptheads] Department Hea
- [passes, limited, 15daypass] 15 Day Pass
- [passes, limited, weekday] Weekday Only Pass
- [passes, unlimited, adtunlmt] Adult Unlimited Pa
- [passes, unlimited, snrunlmt] Senior Unlimited F
- [passes, unlimited, ythunlmt] Youth Unlimited P
- [tickets, adult, 1day] 1 Day Adult Ticket
- [tickets, adult, 2day] 2 Day Adult Ticket

Item / Pass Relationships

Assigned passes

- [miscrdprg, discrdprg, discard] Discount Ca
- [passes, employee, employee] Employee Pass
- [passes, limited, 1dayperwk] 1 Day Per Week P

Discount macro for assigned item: SPECIAL("15% "

Save

Cancel

Although the example shown above uses the **SPECIAL** macro, there are other options available for altering the price of the item. The following table shows various approaches to altering the price using the **SPECIAL** and **PRICE** macros.

Macro	Action
SPECIAL ("XXXXXXXXXX")	Applies the special specified between the quotes (special nickname padded out to ten characters).
SPECIAL ("XXXXXXXXXX" , 10.00)	Applies the special name to the line and sets the item's price to the specified amount. This adjusts the amount of the discount accordingly. In this example the special specified between the quotes is applied to the line, but the end price of the item is \$10. A \$50 item would show a \$40 discount and a \$100 item would show a \$90 discount.
SPECIAL ("XXXXXXXXXX", 5, 3.00)	In this example, special XXXXXXXXXXXX is applied to the item, a 5% discount and a \$3 discount is applied to the item.
PRICE(10.00)	This example sets the price of an item to \$10 and does not apply any special or calculate a discount amount based on the original price of the item.

Using the CHECKPOINTS macro

This macro checks the value held in the **Points1** or **Points2** field, applies a special based on the number of points, and then resets the points by a certain amount. This type of a macro is useful in “reward” programs. Although this same type of functionality is available with auto-validation programs using the **Discount** counter functionality, using validation with a DCI allows points to be accumulated from the purchase of an unlimited number of items as opposed to being limited to the auto-sale of a single item. (For instance, a point can be accumulated based on the purchase of entrance ticket or lessons.)

The following example is essentially a “buy six get the seventh free” type of program. The twist in this particular program is that the guest is allowed to decide when he would like to receive his free ticket. The guest can choose to immediately take the free ticket on the seventh purchase or he may choose to postpone receiving the free ticket. The guest is allowed to accumulate only 1 point per day.

Steps:

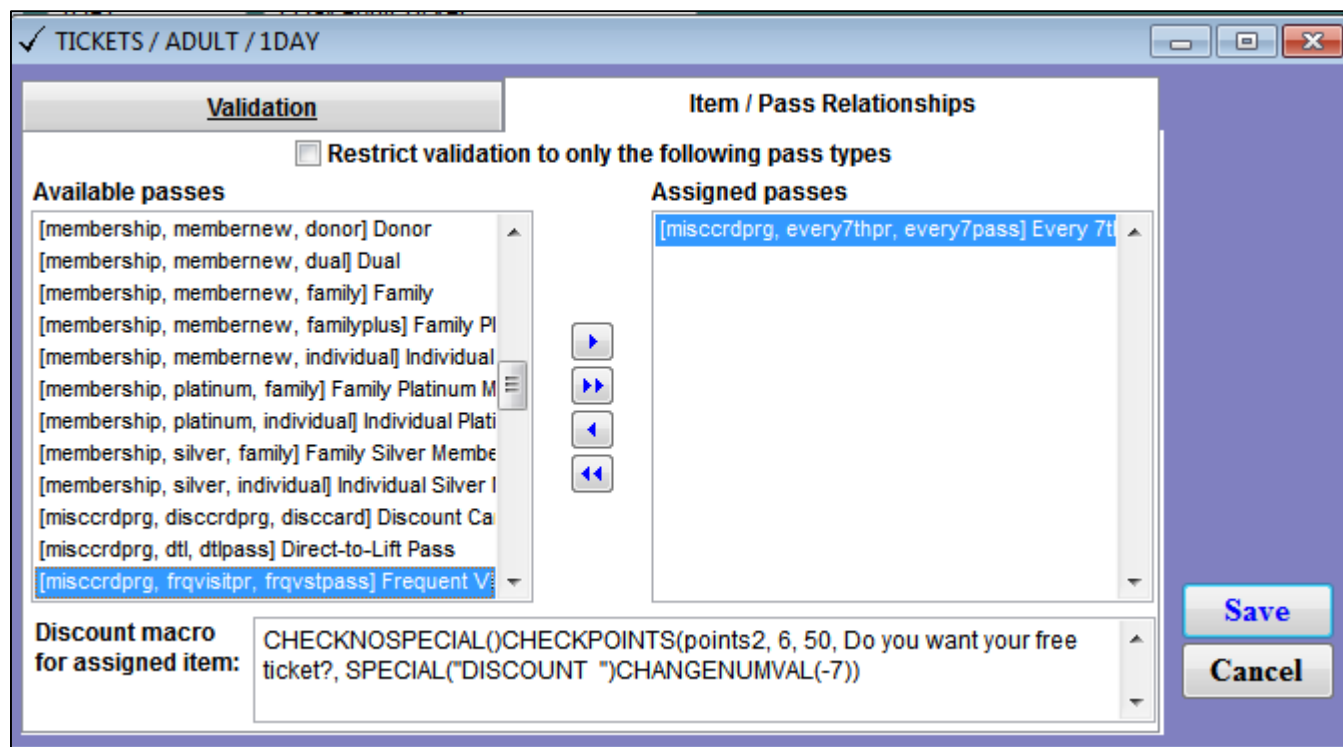
1. Adding and subtracting value on the **Validation** tab – The **Validation** tab deducts one daily use in order to limit the point accumulation to once per day. The **Points 2** field adds a point with every successful validation.

Note: This means that the pass allowed to validate this item must be configured with 1 **Uses Per Day** on the **Global Settings** tab within the **Action Specifics**.

Validation		Item / Pass Relationships	
Total Uses	0	☐ Ignore Blackout Dates	
Uses Per Week	0	☐ Ignore Days Of Week	
Uses Per Day	-1		
Points 1	0		
Points 2	1		
Money 1	\$0.00		
Money 2	\$0.00	Access Delay	0
☐ Multiple validations		Extend expiration date (days)	0
☐ Do NOT increment the discount counter		Round to end-of-month	☐

2. Configuring the discount macro on the **Item/Pass Relationships** tab. Enter this macro:
`CHECKNOSPECIAL()CHECKPOINTS(points2, 6, 50, Do you want your free ticket?, SPECIAL("DISCOUNT "))CHANGENUMVAL(-7))`

Note: The value of the **Points2** field must be between 6 and 50. If this is true, the operator is prompted to ask the guest if he would like to receive his free ticket. If the answer is **YES** to this question, the special is applied and the points are reset by 7. If the **Points2** field is not between 6 and 50, the guest accumulates one point every day that his pass is used to validate a full price (non-discounted) item.



Using the EVERYX macro

This macro is very similar to the **CHECKPOINT** macro except that the guest does not have a choice to postpone receiving the discount and instead of resetting the point value, the discount is offered at regular point intervals. This macro can be useful when implementing reward programs.

In the following sample program, a pass holder receives a 15% discount on all ticket purchases except every fifth purchase is free. The pass holder may only receive one discounted ticket and one point per day.

Steps:

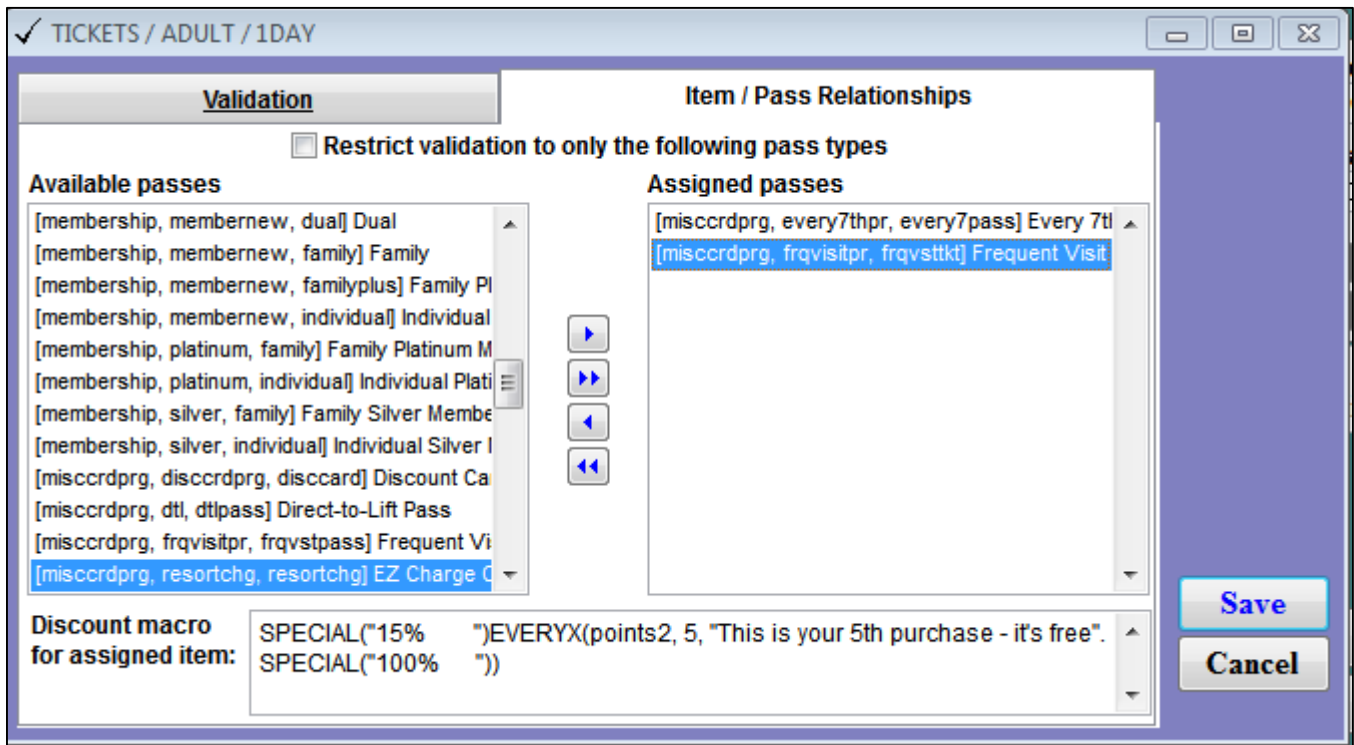
1. Adding and subtracting value on the **Validation** tab: The **Validation** tab *deducts* one daily use in order to limit the point accumulation to once per day. The **Points 2** field *adds* a point with every successful validation.

Note: This means that the pass allowed to validate this item must be configured with 1 **Uses Per Day** on the **Global Settings** tab within the **Action Specifics**.

Validation		Item / Pass Relationships	
Total Uses	0	☐ Ignore Blackout Dates	
Uses Per Week	0	☐ Ignore Days Of Week	
Uses Per Day	-1		
Points 1	0		
Points 2	1		
Money 1	\$0.00		
Money 2	\$0.00	Access Delay	0
☐ Multiple validations		Extend expiration date (days)	0
☐ Do NOT increment the discount counter		Round to end-of-month	☐

2. Configuring the discount macro on the **Item/Pass Relationships** tab – Enter this macro: `SPECIAL ("15%")EVERYX(points2, 5, "This is your 5th purchase - it's free", SPECIAL ("100%"))`

Note: If the value of the **Points2** field is a multiple of five, the operator is notified that the guest receives his free ticket and the “100%” special is applied to the item. If the **Points2** field value is not a multiple of five, the “15%” special is applied.



Additional validation options

In addition to the validation programs outlined above, there are additional options available for use in various validation programs. These options are not used often, but can be helpful in specific situations. These options include:

- Parent pass validation
- Unit value programs
- Checkpoint functionality
- Site restrictions
- Cascading validation
- Card activity table functionality

As always, please consult *accesso Siriusware* Technical Support for more information on these options as they can be complex and need to be thoroughly reviewed and tested prior to implementation.

Parent pass validation (auto validation option)

Parent pass validation allows a single pass record to be loaded with all of the value and have multiple passes linked back to that parent pass in order to deduct or add values.

Example:

A 50-Day pass package allows an entire family to share fifty days' worth of use. Each family member has his own pass, but when the linked guests' passes are validated the uses are all deducted off of the parent pass that contains the fifty uses.

Note: In order for this program to work properly, the guests sharing this program must be linked properly to the parent guest record. This is done in Sales by using the **Set Primary** button on the guest record.

To set up parent pass validation, one pass DCI is created that represents the parent pass and contains all of the necessary value. Then, a second pass DCI is configured that has the **SysManager > Activities > DCIs > New/Edit > Action** tab > **Create Pass** radio button > **Action Specifics** button > **Starting Values** tab > **Validate parent instead of this** check box checked. During the sales process it is critical that the operator verify that the guests are linked together properly with parent/child relationships!

This functionality has the following limitation: Parent pass validation validates the first pass located for the parent. This means that if the parent guest record has multiple pass records, when child passes are validated the value is added or deducted off of the first pass located for the parent. However, passes can be linked and the parent/child pass relationship can be established manually after the passes have been sold separately. To do this, look up the child guest from **Sales > Guest Lookup**, go to **Pass Inquiry** and modify the selected pass. On the **Pass Dialog**, press the **Master Pass** button and enter the parent pass information to set the link. After the link has been set, the main **Pass Information** dialog displays the link information, which looks like the example below. The same text also displays in the parent pass information:

Linked Passes (* indicates top level pass):

Pass: 4003001*, PEPPER SCOTT, Master Pass

Pass: 5003001, MAXIE SCOTT, Family Member Pass

To support this functionality in SysManager, the **Activities > DCIs > New/Edit > Action** tab > **Create Pass** radio button > **Action Specifics** button > **Starting Values** tab includes a **Validate parent instead of this/Parent is determined by** check box, with the following two options – by **Parent Guest** or by **Master Pass No.** The guest's **Pass Edit** includes the **Master Pass #** field if the pass is set to be validated against a master pass. This field displays both the master pass number and the guest name of who holds the master pass.

The following screen capture shows how to configure a parent pass that contains the value:

EVENTS / FUNCTIONS / CHAIRS (Adding)

Item Discounts		Remote Validation		DebitWare	
Starting Values	Global Settings	Auto Pass Validate	Auto Sales	Autosale Options	

Starting Values For New Passes

Pass Is Valid

2013-01-01 12:00:00 AM Through 2013-12-31 12:00:00 AM

Tue Now BOD EOD Tue Now BOD EOD

Total Uses	Discount Level	Points	Money	Unit Value
50	0	1 0	\$0.00	☐
		2 0	\$0.00	☐

☐ Validate parent instead of this

Parent is determined by: ☒ Parent Guest ☐ Master Pass No

☐ Assign number from basket 0 (num_source)

☐ Create a DirectNet account when sold

☐ Create only one Access Record for quantities > 1

Save

Cancel

The following screen capture shows how to configure a child pass that deducts (or adds) value to the parent pass when validated:

EVENTS / FUNCTIONS / CHAIRS (Adding)

Item Discounts Remote Validation DebitWare

Starting Values Global Settings Auto Pass Validate Auto Sales Autosale Options

Starting Values For New Passes

Pass Is Valid

2013-01-01 12:00:00 AM Through 2013-12-31 12:00:00 AM

Tue Now BOD EOD Tue Now BOD EOD

Total Uses: 0 Discount Level: 0

	Points	Money	Unit Value
1	0	\$0.00	☐
2	0	\$0.00	☐

☒ **Validate parent instead of this**

Parent is determined by: ☒ Parent Guest ☐ Master Pass No

☐ Assign number from basket 0 (num_source)

☐ Create a DirectNet account when sold

☐ Create only one Access Record for quantities > 1

Save Cancel

The sale process *must* include operator verification and/or linking of the appropriate parent/child relationships, as shown in the following screen capture:

Guest Info Guest Info 2 Guest Info 3 Summary

Parent Guest Primary Guest Second Linked Guests

*Name (First\Last) JANE DOE Salute Mrs.

S Child Guests

for Guest#2009001, JANE DOE

DOE | FRANK | 8004001 | 345 FRIENDLY LANE | GETTYSBURG | (454) 334-4556 | 1975-10-15 UP

Last Name	First Name	Guest Number	Address	City	Phone	DOB
DOE	FRANK	8004001	345 FRIENDLY LANE	GETTYSBURG	(454) 334-4556	1975-10-15
DOE	JANE	9004001	345 FRIENDLY LANE	GETTYSBURG	(454) 334-4556	
DOE	LESLIE	12004001				

Unit value programs (validation with a DCI option)

Program description

Unit value programs provide a way for guests to pre-purchase a certain number of days/admissions, yet allow the revenue to be distributed when the days/admissions are actually redeemed. This program works with the **Points 1/Money 1** or **Points 2/Money 2** combinations of fields.

Example:

A 5-Admission Card is purchased by the guest for \$100.00. The **Unit Value** of the card is \$20 (\$100 / 5 points). When the guest redeems the card the operator adds an item to the sale that is configured with either forced or optional validation. The operator enters the pass number (or card number from the `swipe_no` field). The price of the item is adjusted to \$20 – the **Unit Value** of the card. The operator may then finalize the sale to a payment type configured for this program. The guest now has 4 points. The total card value is \$80 (\$20 x 4 points).

This program also allows guests to load their card with additional points to be used for additional days/admissions. When this happens, the **Unit Value** of the card is re-calculated.

Example:

The card in the example above is currently worth \$80 (\$20 unit value x 4 remaining points). The guest purchases 3 more points for \$75. The card now has 7 total points with a new unit value of \$22.14 (current value of \$80 + new value of \$75 = \$155 divided by total points of 7 = \$22.14). The next time the guest redeems his card for a ticket, the price of the ticket is adjusted to the new unit value of \$22.14.

It is very important that the accounting department be involved in implementing these types of programs, as they involve several decisions regarding profit centers and payment types.

Example:

- What profit center is used to hold the revenue from the “pre-purchased” card (from the initial sale of the unit value card or sale of the “additional points” items)?
- What payment type is used when one of these cards is redeemed? (The guest has already paid for the card, so they can’t pay again when redeeming the card).
- How is the profit center for the pre-purchased cards reconciled with the payment type used when the card is redeemed?

Sample program configuration

Step 1 – Pass configuration

The pass item is configured with a price on the **Price** tab and the appropriate number of points in the **Points 1** or **Points 2** field and the **Unit Value** check box is checked next to the **Points** field used in the program:

MISCCRDPRG Cat:UNITVALUE

Nickname

Description for DCI List

UV5DAYPASS

Unit Value 5 Day Pass

Fundraising Interface

Sales Actions

Inventory

Required Fields

Security

Modifiers

Price History

Liability

General

Sales Point Type

Restrictions

Price

Profit Ctrs

Web

Specials

Action

Printing

☐ Direct Pricing

☒ 1 Price All Week

☒ Flat Rate

☒ No Tax 1

☒ No Tax 2

☒ No Fee

☒ Default Only

☐ WeekDay/Weekend

☐ Calculate

☐ 6.5000%

☐ 2.5000%

☐ Fee 1

☐ 1 ☐ 2 ☐ 3 ☐ 4

☐ 7 Prices (Mon-Sun)

☐ Add Tax

☐ 0.0000%

☐ 0.0000%

☐ Fee 2

☐ Dynamic Pricing

Default:

200.00

PASSES / MISCPASSES / UNITVALCD5 (Adding)

Item Discounts		Remote Validation		DebitWare	
Starting Values	Global Settings	Auto Pass Validate	Auto Sales	Autosale Options	

Starting Values For New Passes

Pass Is Valid

2013-07-20 4:27:04 PM

Sat Now BOD EOD

Through

2014-03-31 12:00:00 AM

Mon Now BOD EOD

Total Uses

0

Discount Level

0

	Points	Money	Unit Value
1	5	\$0.00	☒
2	0	\$0.00	☐

☐ Validate parent instead of this
 Parent is determined by: ☒ Parent Guest ☐ Master Pass No

☐ Assign number from basket 0 (num_source)

☐ Create a DirectNet account when sold

☐ Create only one Access Record for quantities > 1

Step 2 – Pass sale

When the pass is sold, the **Money 1** or **Money 2** field is populated by the current “per point” value of the card (the **Unit Value**).

1	UnitValue 5 Day Pass 07/20/2013 JANE	200.00
---	--------------------------------------	--------

```

JANE DOE 1/1/1977 Guest# 13001001

Pass# 54004001
Valid: 7/20/2013 12:00:00 AM through 7/19/2014 11:59:59 PM
Last Use: / /
Total Uses: 0
Points1: 5
Points2: 0
Money1: 40.00
Money2: 0.00
  
```

Step 3 – Validation item (validation product) configuration

The item sold when a unit value card is redeemed must be configured with either optional or forced validation and must deduct a point from the appropriate **Points** field.

Optional: Daily uses may be used in this program if necessary as long as the unit value pass is configured with **Uses Per Day** (**Global Settings** tab within the **Action Specifics** for the pass).

Optional: A special can be linked to the sale of the item by using the **Discount macro for assigned item:** box. The amount of the special is determined at the time the unit value card is redeemed.

✓ PASSES / LIMITED / 1DAYPERWK (Adding)

Validation

☐ Restrict validation to only the following pass types

Available passes

[membership, platinum, individual] Individual Plati

[membership, silver, family] Family Silver Membe

[membership, silver, individual] Individual Silver t

[miscrdprg, discrdprg, discard] Discount Cai

[miscrdprg, dtl, dtlpass] Direct-to-Lift Pass

[miscrdprg, every7thpr, every7pass] Every 7th

[miscrdprg, frqvisitpr, frqvstpass] Frequent Vi

[miscrdprg, frqvisitpr, frqvsttkl] Frequent Visit

[miscrdprg, resortchg, resortchg] EZ Charge C

[miscrdprg, sharedvalu, linkedpass] Linked Pas

[miscrdprg, sharedvalu, masterpass] Master P

[passes, employee, dptheds] Department Hear

Discount macro for assigned item:

SPECIAL("UNITVALUE ")

Item / Pass Relationships

Assigned passes

[miscrdprg, unitvalue, uv5daypass] Unit Value

Save

Cancel

Step 4 – Pass is redeemed

The item configured with forced or optional validation (step 3) has its price adjusted to the **Unit Value** of the pass used for validation (only for successful validations!) and a point is deducted from the pass.

The following screen capture shows the item on the Sales screen before validation with a unit value card with a \$50 per point value:

1	1 Daily Use Ticket	40.00
<<	>>	
Modify	Special	DateTime
Account	Message	Validate
		40.00

The following screen capture shows the item on the Sales screen after validation with a unit value card with a \$50 per point value:

1	1 Daily Use Ticket UNIT VALUE DISCOUNTS	20.00
<<	>>	
Modify	UNITVALUE	DateTime
20.00	Account	Message
	GORING	LISA
		20.00

Optional: Step 5 – “Add points” validation item configuration

An item may be configured to “add points” to existing unit value cards. The item must have a price and forced validation is selected. The number of points to add to the pass record entered for validation is specified in the appropriate **Points** fields.

✓ PASSES / MISCPASSES / UVLOAD3 (Adding)	
<u>Validation</u>	Item / Pass Relationships
Total Uses	0
Uses Per Week	0
Uses Per Day	0
Points 1	3
Points 2	0
	☐ Ignore Blackout Dates
	☐ Ignore Days Of Week

Optional: Step 6 – “Add points” validation item sale

To add points to an existing card, the “add points” item is sold and validated with an existing unit value pass. The new unit value (held in the **Money1** or **Money2** field) is calculated based on the sum of the existing value of the card plus the new value of the card divided by the new total point value.

1	Unit Value - Add 3 Points	75.00
<<	>>	
Modify	Special	DateTime
Account	Message	Validate
		75.00

Unit Value - 5 pt Card	Create New Reservation Header															
	<table border="1"> <tr> <td>1</td> <td>Unit Value - Add 3 Points</td> <td>75.00</td> </tr> <tr> <td><<</td> <td>>></td> <td></td> </tr> <tr> <td>Modify</td> <td>Special</td> <td>DateTime</td> </tr> <tr> <td>Account</td> <td>Message</td> <td>GORING LISA</td> </tr> <tr> <td></td> <td></td> <td>75.00</td> </tr> </table>	1	Unit Value - Add 3 Points	75.00	<<	>>		Modify	Special	DateTime	Account	Message	GORING LISA			75.00
1	Unit Value - Add 3 Points	75.00														
<<	>>															
Modify	Special	DateTime														
Account	Message	GORING LISA														
		75.00														
Unit Value - Add 3 Points																
ITEMS CREATED: 1 OF 1		Previous Next Save														
Validation	Guest Info	Guest Info 2														
	Guest Info 3	Summary														
Pass Number	276003010															
	Reset															

Checkpoint functionality (auto-validation option)

Checkpoint functionality was designed to help monitor current capacities between various entrance and exit gates. This type of information is especially helpful when operating venues with maximum capacity levels such as water parks or museum exhibitions. The checkpoint functionality has also been used in programs that allow guests to time themselves at the entrance and exit points of a hiking trail.

In order to use this functionality, the **Create check point log entry when validating** check box must be checked. This check box is found on the **Global Settings** tab within the **Create Access** record > **Template** button and **Create Pass** > **Action Specifics** button.

PASSES / UNLIMITED / ADTUNLMTD

Item Discounts Remote Validation DebitWare

Starting Values Global Settings Auto Pass Validate Auto Sales Autosale Options

Global Setting For All Passes

Uses Per Day: 0 Uses Per Week: 0

☒ Monday ☒ Friday
☒ Tuesday ☒ Saturday
☒ Wednesday ☒ Sunday
☒ Thursday

Times: : :
☐ Enforce time part of start/end date

Revenue Recognition Rule: ** No Revenue Recognition **

Credit Card Program ID:

☒ Create check point log entry when validating

☐ Allow "on-the-fly" discounting

Sales Screen action to execute when this item is validated: No Validation

Save Cancel

Check point records can also be added for a guest by editing the guest's pass record in SysManager. This is helpful in situations when a guest is timing himself between start and end points (such as the beginning and ending of a trail or any other timed venue) and somehow missed scanning his pass at the entry or exit point.

Checkpoints for Pass# 232003010

Date Time	Location	Sales Point	Operator
7/19/2005 9:23:15 AM	TRAIL	END	END
7/19/2005 8:04:00 AM	TRAIL	START	START

New Edit Delete

There are several configuration settings required in ScanMan and GateKeeper modules in order to implement this program. Please refer to the *Salesware Access Control* documentation for full details of this program.

Site restrictions (auto-validation and validation with a DCI option)

Site restrictions are used only when multiple resorts/businesses are all using Salesware module and want to share programs. The site restriction allows only certain programs to be shared between these multi-site venues. There are two types of site restrictions based on using either WAN validation or SQL replication.

WAN validation site restrictions

Wan validation is described in detail in [WAN Validation](#).

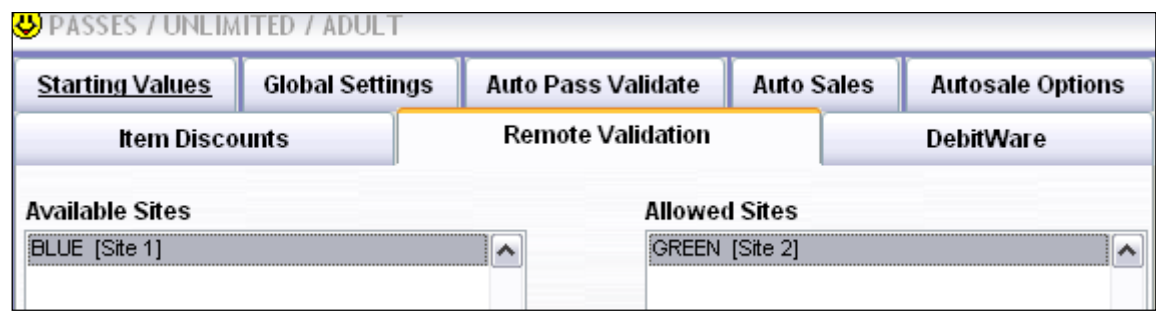
When a ticket or pass is scanned at a secondary site, WAN validation re-routes the validation of the pass or access record back to the site that originally created the ticket or pass. When the validation is passed back to the site where the ticket or pass was created, the validation template for the ticket or pass (**Create Access Record > Template** or **Create Pass > Action Specifics** template) is verified to ensure that the ticket or pass being scanned can be used at that secondary site. See [WAN Validation](#) for details on how to configure this particular validation program.

Example

Site BLUE and site GREEN share a season pass program. Both resorts allow Unlimited Use passes to be used at either location. However, Limited Use passes cannot be shared between the two resorts. Site BLUE is configured as **Site 1** on the **SysManager > Preferences > Company Information** dialog. Site GREEN is configured as **Site 2** on the **Company Information** dialog.

BLUE site pass configuration

- For the unlimited use pass, **Create Pass > Action Specifics > Remote Validation** tab: Site GREEN is listed in the **Allowed Sites** pane.



- For the limited use pass, **Create Pass > Action Specifics > Remote Validation** tab: Site GREEN is **not** listed in the **Allowed Sites** pane.

PASSES / MISCPASSES / DAYS ONLY

Starting Values | Global Settings | **Auto Pass Validate** | Auto Sales | Autosale Options

Item Discounts | **Remote Validation** | DebitWare

Available Sites

- BLUE [Site 1]
- GREEN [Site 2]

Allowed Sites

GREEN site pass configuration

- For the unlimited use pass, **Create Pass > Action Specifics > Remote Validation** tab: Site BLUE is listed in the **Allowed Sites** pane.

PASSES / UNLIMITED / ADULT

Starting Values | Global Settings | **Auto Pass Validate** | Auto Sales | Autosale Options

Item Discounts | **Remote Validation** | DebitWare

Available Sites

- GREEN [Site 2]

Allowed Sites

- BLUE [Site 1]

- For the limited use pass, **Create Pass > Action Specifics > Remote Validation** tab: Site BLUE is not listed in the **Allowed Sites** pane.

PASSES / MISCPASSES / DAYS ONLY

Starting Values | Global Settings | **Auto Pass Validate** | Auto Sales | Autosale Options

Item Discounts | **Remote Validation** | DebitWare

Available Sites

- BLUE [Site 1]
- GREEN [Site 2]

Allowed Sites

SQL replication site restrictions

SQL replication site restrictions are similar to WAN validation site restrictions. The difference is that the validation of the ticket or pass is done locally as opposed to re-routing the validation back to the originating site. With SQL replication, all ticket and pass records are replicated between all resorts that share programs, thus all resorts have a

local copy of the pass and access records. This also means that the access templates and pass action specifics must be configured at each local resort for all of the shared programs.

When a ticket or pass is scanned, the site number embedded in the ticket or pass is verified against the local site number (configured in **SysManager > Preferences > Company Information**). If the ticket or pass was created locally, then the validation proceeds without any site restriction checking. If the ticket or pass was not created locally (the embedded site number does not match the local site number), then the site restrictions for that particular DCI are checked to make sure that tickets or passes with that site number embedded are allowed to be validated at the current location (site).

The configuration is the same as with WAN validation site restrictions in that the non-local ticket and pass sites must be added to the **Allowed Sites** pane within the **Create Access Record > Template > Remote Validation** tab or **Create Pass > Action Specifics > Remote Validation** tab.

Note: In order to activate the SQL replication site restriction check, the following .INI setting must be added to the [Preferences] section of the SalesEZ.INI file: EmbeddedSiteNo=YES.

Warning: Caution must be taken when using the SQL replication site restriction check. Using this restriction means that all access, pass, addit_no, swipe_no (that are not standard sixteen digit card numbers) and guest numbers must be embedded with either the local site number or one of the shared program site numbers. Without the last three digits of these numbers matching one of the configured sites, the validation fails. The option to import non-standard Salesware numbers for use in validation programs is no longer an option when this restriction check is activated!

Cascading validation (auto-validation and validation with a DCI option)

Cascading validation allows a guest to be issued one physical card and have that single card be used for multiple validation programs within the same operating season or even throughout several operating seasons. When cascading validation is active, the number scanned (or swiped) is checked. If the pass record scanned/swiped is not valid, other pass records for the guest are checked until a valid pass for the guest is located or if no valid pass record exists for the guest, the validation fails. The key to cascading validation is selling new pass items to the correct existing guest!

Cascading validation can cut down on material costs as guests do not need to have new cards printed each time they renew their membership/season pass or sign up for a new program. Plus it provides the added benefit of minimizing the number of cards guests must carry in order to participate in multiple programs.

Cascading validation varies slightly based on the type of number sent in for validation.

Cascading validation with pass numbers

One of the greatest benefits of using pass numbers for validation is that cascading validation can be turned on or off for both auto-validation (referred to as “self-validating” in the **SysManager > Preferences > Access Control Preferences**) and programs that involve validation with a DCI.

The ability to alter the behavior of cascading validation per “validation type” can be helpful when customizing validation programs. Remember that auto-validation may occur in Sales or with remote scanning applications such as GateKeeper and ScanMan, while validation with a DCI only occurs in Sales.

Another option available with cascading validation is the ability stop cascading if a pass is lost or stolen. This is done by checking the **SysManager > Preferences > Access Control Preferences > Stop cascade if pass record scanned is voided** check box. With this capability, lost or stolen passes can be inactivated. The key is to enter something within the **Voided by** and/or **Voided for** fields of *the pass record whose number is printed on the lost card*. With this option activated, the **Voided By/ Voided For** fields are first checked for the pass record scanned. If they are populated, the cascade does not occur and the validation fails. If these fields are empty, the cascade proceeds as normal. Because the nature of cascading validation is to allow a single card be used for multiple seasons/years or for various programs, all other reasons that a pass may be invalid (expired, blacked-out, no uses remaining, etc.,) still trigger the cascade even with this option checked.

Access Control Preferences

Prefix Table

	Pass Table	Key Field	Info Table	Log Table	Remote IP	x.x.x.x:pppp
	GST_PASS	PASS_NO	GUESTS	GST_ACTV		
A	ACCESS	PASS_NO				
P	GST_PASS	PASS_NO	GUESTS	GST_ACTV		
R	ACCESS	ADDIT_NO				
S	GST_PASS	SWIPE_NO	GUESTS	GST_ACTV		
Z	GST_PASS	ADDIT_NO	GUESTS	GST_ACTV		

☐ Ignore successive re-scans of the same pass by the same scanner

Do not do "cascading" validations if the # sent in is invalid (guest# will always cascade)

☒ WHEN SELF-VALIDATING

☐ WHEN VALIDATING WITH A DCI

☒ Stop cascade if pass record scanned is voided

New **Delete** **Save** **Cancel**

Cascading validation with guest numbers

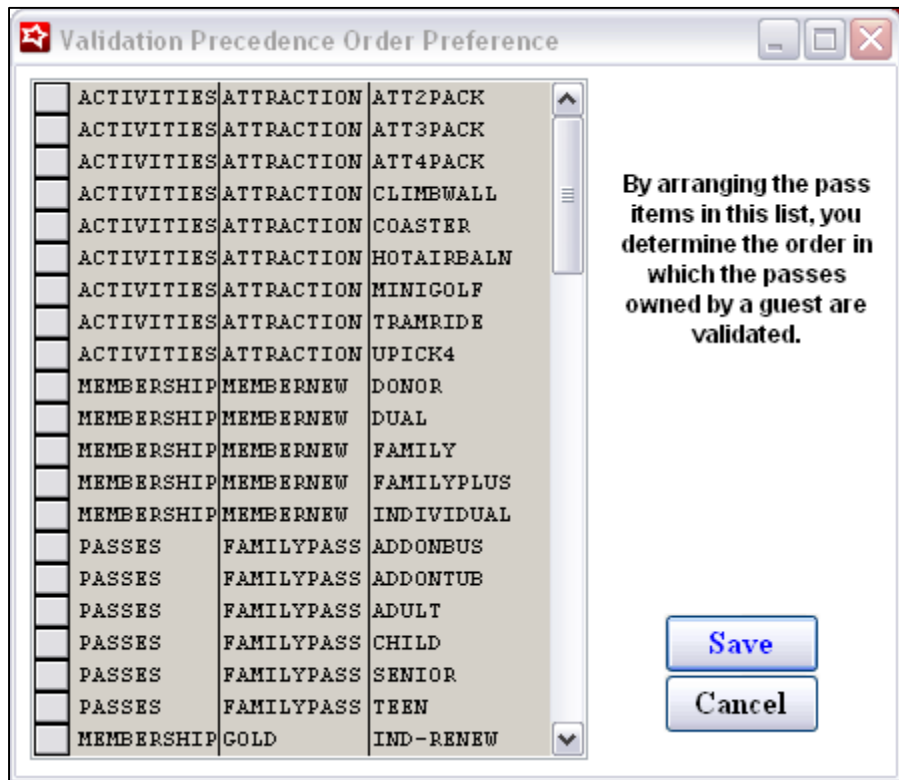
Validation with guest numbers always results in cascading validation. There is no way to “turn off” cascading validation for either validation type (“self-validation” or validation with a DCI) and the option to **Stop cascade if pass record scanned is voided** is not an option (because a guest record is scanned, not a pass record).

Cascading validation with card numbers

Validation with sixteen digit card numbers always results in cascading validation. There is no way to turn off cascading validation for either validation type when using card numbers, but the option to **Stop cascade if pass record scanned is voided** is available.

Card number validation is unique in that there is a bit more control surrounding the order in which passes are validated during cascading validation. Here is how it works:

- A card number is scanned.
- If the option to **Stop cascade if pass record scanned is voided is active**, then the pass record that contains the card number in the `swipe_no` field is verified to make sure that there is nothing in the **Voided By** and/or **Voided For** fields. If something is in these fields, the cascade is stopped and the validation fails.
- If the pass record that contains the card number has not been voided (assuming that the option to stop the cascade is active), then the cascade proceeds as normal.
- Normal cascading with card numbers first locates the guest record, and then generates a list of all passes owned by the guest.
- If validating with a DCI and restricting validation to only certain pass DCIs (within the **Item/Pass Relationships** tab within the validation template), the list of all passes owned by the guest is narrowed down to just those allowed to validate the item. *This step only occurs when validating a product in Sales that restricts the types of passes allowed for validation.*
- The list of remaining passes is then ordered based on the **SysManager > Preferences > Validation Precedence** menu. The **Validation Precedence** menu option is used to define the order in which passes are validated. The order may be re-arranged by grabbing the square next to each item and dragging it up or down in the list.



The validation proceeds through the ordered list of passes until it finds a valid pass record.

Cascading validation of access records

CheckPass, **ValidatePass**, **CheckAndValidatePass** and **TricklePass** now perform cascading validation of Access (ticket) Records, if the template on the Access product is configured with the **Allow Cascading Validation of This Access Product** check box checked. SalesEZ application looks for Access records that were sold as modifiers to the parent access item, finding sibling access records based on a common mastertran value in the transact table.

New **Allow Cascading Validation of This Access Product** check box is to be found in **SysManager > Item Edit > Action tab > Template > Starting Values** tab. Checking this box enables the access product to cascade to other access items that were sold as modifiers to the parent access item, finding sibling access records based on a common mastertran value in the transact table.

Cascading access records through multiple layers of modifiers

Previously, a sales line item modifier could only access one level of modifier to take on the access record of its parent. For example, many clients have multiple timed events. For ease of selling, the main item is Adult, Child and Senior. The first layer of modifiers are the various venues/activities/exhibits/movies, then these have their own modifiers for selecting the time. The second layer of modifiers contain the revenue and Max4Sale. In the past this could only be achieved through multiple barcodes on a ticket or by printing multiple tickets.

Now, by default, a Sales line item modifier takes on the access record of the top-most access record in its chain. To disable this functionality and revert to the previous behavior, set **SetMasterpassToParentPass=TRUE** in the **Sales32c.INI**, **[Preferences]** section.

Cascading validation of E% discounts

In an effort to reduce waste and added expense many forms of Pass/Membership media are reused from year to year. This media uses cascading validation or the Axxess gate system to validate the current year's pass. In many cases swipe discounts (%E Sales screen action macros) are enabled on these passes. In order to better accommodate these discounts while still allowing for the reuse of pass media.

Configuration

When a pass that is voided or has expired with the setting of **Check for Void and Date Range - Cascading** in **SysManager > Item Edit > Action > Action Specifics > Global Settings** tab for **Sales screen action to execute when this item is validated** performing an **E+pass_no**, **swipe_no** or **addit_no** call with the invalid pass SalesEZ application searches for a valid pass, not voided or expired, that has a Sales screen action macro assigned, **do_on_val** is not empty and uses the found pass to apply the Sales screen action macro. The appropriate Sales screen action macro has to be in the found pass to be applied and uses are not taken off of the pass when the Sales screen action macro is applied.

Full Cascading Validation

Configuration

1. The **WHEN SELF-VALIDATING** box must be un-checked within **Preferences > Access Control**.

Warning: This also turns on cascading validation for scans at the lift/gate or %AA auto-sale scans in Sales.

The **WHEN VALIDATING WITH A DCI** check box doesn't impact the %EP cascading, so having that checked or un-checked is irrelevant. The **Stop cascade if pass record scanned is voided** setting applies to the %EP cascade in the same way it does for other cascading programs. If the pass record scanned is voided, it does not cascade. This helps prevent a guest from using a pass that has been reported lost or stolen, and subsequently replaced, from receiving discounts/benefits by cascading to the replacement pass.

Access Control Preferences

Prefix Table					
	Pass Table	Key Field	Info Table	Log Table	Remote IP x.x.x.x:pppp
	GST_PASS	PASS_NO	GUESTS	GST_ACTV	
A	ACCESS	PASS_NO			
P	GST_PASS	PASS_NO	GUESTS	GST_ACTV	
R	ACCESS	ADDIT_NO			
S	GST_PASS	SWIPE_NO	GUESTS	GST_ACTV	
Z	GST_PASS	ADDIT_NO	GUESTS	GST_ACTV	

☐ Ignore successive re-scans of the same pass by the same scanner
 Do not do "cascading" validations if the # sent in is invalid (guest# will always cascade)
 ☐ WHEN SELF-VALIDATING
☒ WHEN VALIDATING WITH A DCI
☒ Stop cascade if pass record scanned is voided

- When configuring the **Global Settings** for a pass, select **Full Cascading Validation**. Usually, we select the **Check for Void and Date Range** option, and that option is still totally valid, especially for those who typically issue a new card with each pass purchase. But, for clients who have their customers keep the same card and use cascading validation, the **Full Cascading Validation** is the better option.

Credit Card Program ID ☐ Create check point log entry when validating

Sales Screen action to execute when this item is validated Full Cascading Validation

IGNOREERRORS()SELECTIVESPECIAL("EMPMGRFOOD")
 IGNOREERRORS()SELECTIVESPECIAL("EMPMGRRET ")



Note: Axess Gate clients need to be set up for **Full Cascading Validation** to allow reloads of season passes purchases from year to year to honor the current year's discounts.

Card activity table functionality

Note: Card activity table functionality is advanced functionality that is only implemented when all other standard configuration options for validation programs have been exhausted.

Card activity table functionality involves issuing valid sixteen digit card numbers that all start with a common prefix (common BIN and possibly more). Then, based on the swipe or scan of one of these card numbers, various actions can occur within Sales.

Note: A BIN range, also referred to as IIN range, may be obtained from ANSI (see http://www.ansi.org/other_services/registration_programs/iin_registration.aspx?menuid=10).

The most common use of this functionality involves performing different actions based on whether the card number swiped already exists within the `swipe_no` field on a pass record within Salesware module.

Sample program

The Marketing department wants to issue 10,000 cards at various trade shows in the area. These Trade Show cards provide a 25% discount on a 1-Day Adult Entrance ticket. The cards can only be redeemed once per day. The Marketing Department wants to collect guest information for those cards that are redeemed. In order to prevent having to manually enter 10,000 pass sales to generic guest records through *accesso Siriusware* considering only a fraction of the cards might be redeemed, the business decides to use the Card Activity Table Functionality for this program.

Configuration

- Valid sixteen digits numbers are obtained for the program and given to a printing vendor in order to encode %B plus the card numbers into either magswipes or barcodes on the pre-printed cards.
- Testing of a sample from the printer ensures that the cards are encoded properly.
- A pass item is configured that is auto-sold when a Trade Show Card is presented the first time. The pass is given 1 use per day and is valid for the current operating season.
- A 25% special is configured for use in the program. This special is configured to **Force Validation When Applied**.
- The 1-Day Adult Entrance item is configured with optional validation that deducts 1 daily use.
- The 25% special is linked to the 1-Day Adult Entrance item.
- A **SysManager > Activities > System Lists > Card Activity Definitions** instance is created for the card numbers:

Card Activity Definition Edit

Description TRADE SHOW CARDS

Prefix 555555 **Suffix** 4Pass

Range

DCI

Action

```

<ABSENT>
SELECTITEM('PASSES MARKETING TRADESHOW ")
SETPASSSWIPE(<CARD_SWIPE>)
DISPLAY(Please Collect Guest Information)
</ABSENT>
<PRESENT>
IGNOREERRORS()
SELECTIVESPECIAL('25% ')
VALIDATE(S<CARD_NO>)
</PRESENT>

```

Save **Cancel**

The following **Action** macro is specified:

```

<ABSENT>
SELECTITEM('PASSES MARKETING TRADESHOW ")
SETPASSSWIPE(<CARD_SWIPE>)
DISPLAY(Please Collect Guest Information)
</ABSENT>
<PRESENT>
IGNOREERRORS()
SELECTIVESPECIAL('25% ')
VALIDATE(S<CARD_NO>)
</PRESENT>

```

The following functionality is provided: If the card number swiped/scanned in Sales *is not* currently located within the **swipe_no** field of an existing pass record in Salesware module, auto-sell the TRADESHOW pass item and prompt the operator to collect guest information. Automatically insert the card number swiped into the **swipe_no** field of the auto-sold pass. If the card number swiped/scanned in Sales *is* currently located within the **swipe_no** field of an existing pass record in Salesware module, apply the 25% discount to the eligible item included in the sale and validate it (using the card number) based on the validation template of the item being discounted.

The first time a Trade Show Card is presented to an operator, the operator swipes the card, a pass is auto-sold, the card number swiped is inserted into the **swipe_no** field of the auto-sold pass record, and the operator collects guest information. Subsequent swipes of the same card discount the appropriate items already added to the sale (in

this particular example, only the 1-Day Adult Entrance ticket) and validate the pass. This results in deduction of 1 daily use.

Please consult *accesso Siriusware* Technical Support before implementing any card activity table functionality!

External validation using exceptions tables

External validation using the Exceptions tables allows pass numbers issued outside of Salesware module to be validated by the ScanMan or GateKeeper scanning applications. Because these pass numbers are issued outside of Salesware module, only a very simple validation is performed on these numbers. The pass number scanned is checked within the Exception tables in order to verify that the number is valid. The scan is then logged in the `exceptions_log.dbf` in order to provide a record of usage. The Scan Activity Report in ReportManager can include data from the exceptions log.

To set up this program:

1. Create folder in `C:\Siriusware\Data` called `ExceptionTables`
2. Place the exception files into `ExceptionTables` folder. The required files are:
 - a. `Exceptions_codes.dbf`
 - b. `Exceptions_codes.cdx`
 - c. `Exceptions_log.dbf`
 - d. `ExampleProgram.dbf`
 - e. `ExampleProgram.fpt`

Note: These files must be obtained from *accesso Siriusware* Technical Support.

3. Set up `Exceptions_codes` table records (one record per program) to identify pass numbers issued outside of Salesware module. Using Helper utility, open the `Exceptions_codes` table. Select the **Append** option and append one blank record. Enter the code, description and `table_name` for the external program.

Example:

A CSA card has valid range of 0056000001 – 0056000800:

- 00 – Characters to strip
- 56 – Code for CSA cards
- 1 to 800 – Number range of valid cards

Field	Description
Code	Prefix identifier that can be up to three characters long (e.g., Code=56).
Descrip	Name of external program (e.g., CSA) that can be up to fifty characters long.

Char2strip	The number of characters to strip from the beginning of the barcode (e.g., Char2strip= 2 in order to strip the first two zeros from the barcode).
Table_name	Name of exception table that is referenced in order to obtain the valid range of numbers. This field can be up to twenty characters long (e.g., CSA).

4. Create tables (for *each* external validation program) that are used to hold the number ranges of the program. Start by using **Example** table (ExampleTable.dbf) and make a copy of the .dbf and .cdx files. Rename the files according to the table names inserted within the Exceptions_codes table records (e.g., CSA). Edit the new table using Helper utility and set the starting and ending numbers in order to define the valid card ranges for the program.

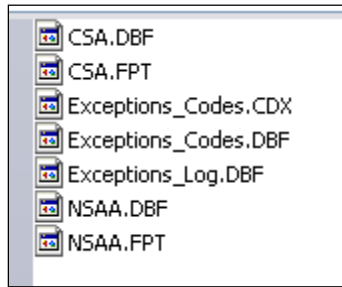
Field	Description
Start_no	Starting card number for program (For above example, start_no = 1).
End_no	Ending card number for program (For above example, end_no = 800).
Notes	Store details of program here for reference.

5. Repeat steps 3 and 4 if necessary for each external validation program to be implemented. The result is one table per program that lists the valid number ranges of the program and one record per program within the Exceptions_Codes table.

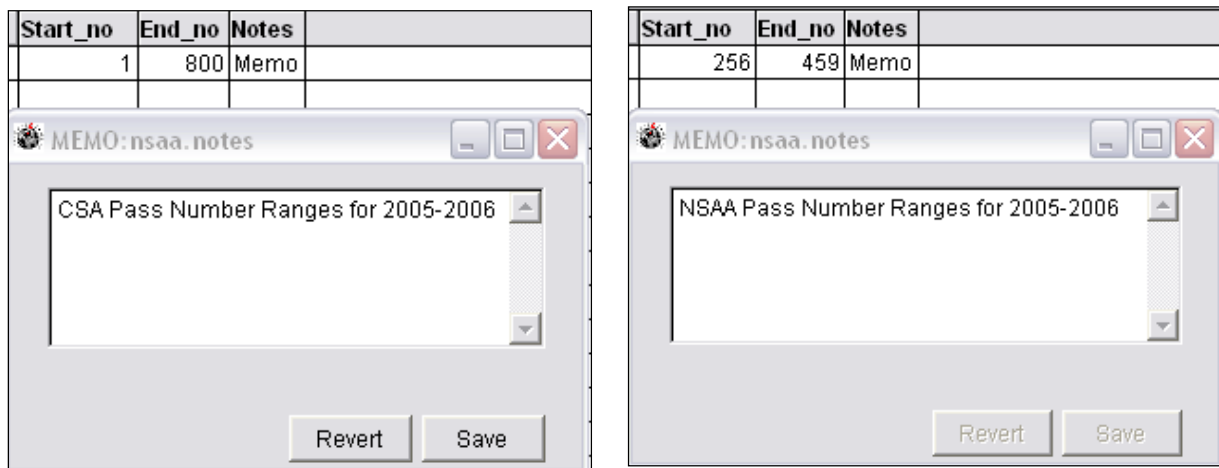
The following screen capture shows a sample Exceptions_Codes table:

Record: 2/2				
	Code	Descrip	Char2strip	Table_name
	56	CSA	2	CSA
▶	382	NSAA	0	NSAA

The following screen capture shows the corresponding Pass Number Range tables per program:



The following screen capture shows the corresponding program number ranges per table:



6. Add the appropriate settings to the SalesEZ . INI and ReportManager . INI files for use in validation and reporting. Sample settings:

```
[Data]
ExceptionsPath=\\fileserver\Siriusware\Data\ExceptionsTables
TrainingExceptionsPath=\\fileserver\siriusware\Data\ExceptionsTables.TNG
```

7. Remove the blank prefix from the **SysManager > Preferences > Access Control** table. To remove the blank prefix, go to **SysManager > Preferences > Access Control** and select the **blank prefix** and select the **Delete** button.
8. Other important notes:
 - a. There cannot be a blank prefix in the prefix table (**SysManager > Preferences > Access Control**). If a blank prefix exists (by default the system has a blank prefix pointing to the `gst_pass` table) all numeric-only scans go to the Salesware table configured for the blank prefix (either `access` or `gst_pass`). With the blank prefix removed, all numeric-only scans are processed based on the exceptions table.
 - b. The exceptions tables are always visual FoxPro tables (. dbf) even if the back-end is SQL.
 - c. Exceptions tables cannot have the same names as tables within the SiriusSQL database.

Please consult *accesso Siriusware* Technical Support before implementing any exception table validation programs!

Global line item validation

Many clients do not want operators to individually validate items in a sale. Instead, they want to enter the pass (member) number for validation one time, and then have that number used for any item requiring validation. In order to accomplish this, the operator can now apply the %E discounts, as well as individually validate line items, all with one swipe. For members who do not carry their membership cards, the existing **Pass Discount** main action button is used to lookup the membership and perform both the discounting and validation all at the same time.

Configuration

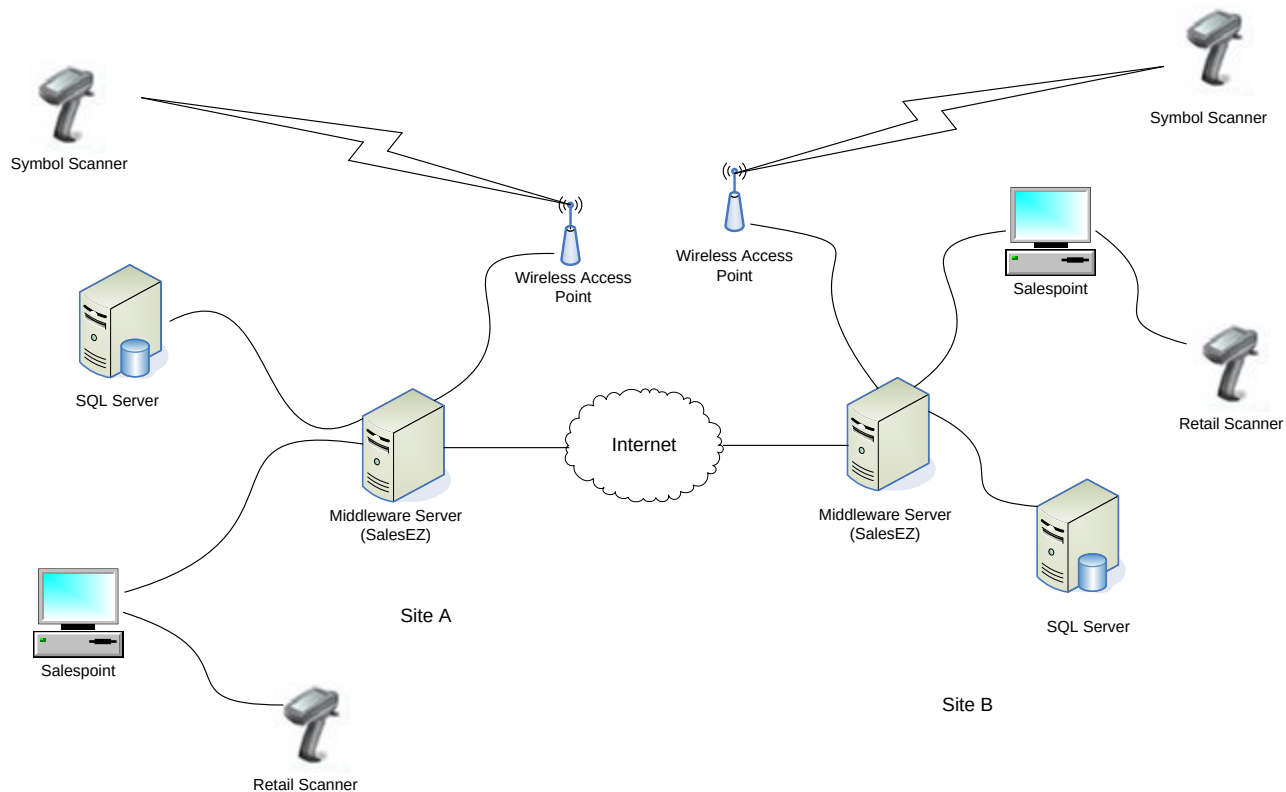
In order to set up this functionality, a new Sales screen action macro, `GlobalItemValidate`, has been added. It has two optional parameters for validation type and pass number:

`GlobalItemValidate(Validation Type, Pass Number)`

Note: Pass Number may require prefix P based on Access Control setup for the blank prefix.

- Validation of type 99 (default) tries to validate all items and can take the form: (), (99) & (99,) are possible configurations
- Validation of type 2 validates only **Forced Validation** items, `GlobalItemValidate(2)` (2) and (2,) possible configurations
- Validation of type 3 validates only optional validation items, `GlobalItemValidate(3)` (3) and (3,) possible configurations

The Sales screen action macro is entered on the appropriate pass/member items within the **Action Specifics** section on the **Global Settings** tab.



Each site that shares programs uses a different site number. This site number is set up in **SysManager > Preferences > Company Information > Site Number**. It is critical that once set, this site number is never changed when using WAN validation programs!

The screenshot shows the 'Company Information' dialog box. The 'Site Number' field, located in the lower-left section, is highlighted with a red rectangular box and displays the number '1'. The dialog includes the following fields and options:

- Company Name:** SIRIUSWARE, INC.
- Address:** 302 CAMINO DE LA PLACITA
- Location:** TAOS, NM, 87571
- Phone:** (575) 751-0633
- Close Cash Drawers By:**
 - ☐ Do NOT close drawers
 - ☐ Salespoint
 - ☒ Operator
 - ☐ Salespoint / Report by Operator
- Site Number:** 1 (highlighted)
- ☐ Use non-USA style phone format by default
- Buttons:** Save, Cancel

This site number is then embedded into every guest, pass and access record (it is also embedded in numbers such as sale numbers, transaction numbers and reservation numbers).

Example:

Pass #251006010 is the 251st pass created at salespoint number 6 at site 10.

When an access or pass record is scanned or swiped at a site other than where the ticket or pass was produced, the validation of that non-local ticket or pass is re-routed back to the site that created the ticket/pass. The validation of the ticket or pass actually occurs back at the originating site and the resulting “good” or “bad” response is given back to the site currently scanning or swiping the non-local ticket or pass.

Where validation occurs is totally transparent to the salespoint. The salespoint simply hands off validation to the local SalesEZ application and SalesEZ “talks” across the WAN to SalesEZ at the site where the ticket or pass was created (assuming it wasn’t created at the local site). The instances of SalesEZ application on either side of the connection “talk” using TCPEZ application, which is installed as part of Common Files application. Similarly, when using ScanMan module, the local instance of SalesEZ application simply hands off validation across the network to the remote instance of SalesEZ where the pass or ticket was created.

If the scan and validation causes an item to be auto-sold, the auto-sale occurs locally if the scan is made from a salespoint, regardless of where validation occurs (validation is transparent to the salespoint). However, if the scan is made using ScanMan module, the auto-sale occurs at the site where the ticket or pass was created (where validation actually occurs). When using WAN validation, this is an important difference between scanning from the salespoint and using ScanMan module. Also note that auto-selling an item from a salespoint when validation occurs across the WAN requires that the item to be validated has the exact same DCI at both sites and is set up exactly the same way using SysManager.

In order to set up WAN validation, the sites sharing programs must be set up in **SysManager > Preferences > Remote Site Setup (WAN Validation)**.

Site Name	Site #	BIN #	ISO #	IP Address	IP Port
Siriusware, Inc. Boulder, CO	2	0	0		
Siriusware, Inc. Gunnison, CO	3	0	0		
Ultimate Resort, Inc.	0	0	0		

To add a new site:

1. Click the **New** button.
2. Enter the appropriate site number and description.
3. Check the **Use WAN Validation** box and enter the IP address of the site’s SalesEZ computer and the port number.

4. If validating with card numbers, the unique **BIN** and/or ISO numbers used per site may also be entered. When a non-local card number is scanned or swiped, the **BIN/ISO** setup within the **Remote Site Setup** preferences are used to re-route the validation back to the appropriate SalesEZ computer (as opposed to the embedded site number in an access or pass record).

Remote Site Setup

Siriusware Site # Site Description

General **Notes**

☒ Use WAN Validation

SalesEZ Pool IP Address IP Port

BIN # (First 6 digits of a credit card # assigned by ISO committee)

ISO # (Digits 7,8 and 9 of a credit card # assigned by Siriusware)

Save **Cancel**

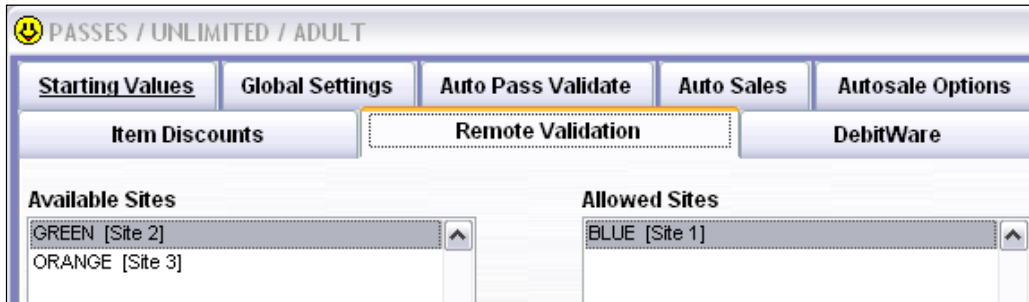
Note: The **Remote Site Setup** preferences are also used when sharing programs between multiple sites using SQL replication instead of WAN validation. When sharing programs with SQL replication (essentially replicating all access and pass records to each site which essentially makes all numbers “local”) it is important to list all sites within the **Remote Site Setup** preferences menu – but *do not* enter an IP address. The presence of an IP address always triggers the re-routing of the validation back to the originating site.

The programs shared between sites must be specified within the access template or pass action specifics on the **Remote Validation** tab. This prevents all ticket DCIs or all pass DCIs from being used throughout all sites. The sites listed on this tab vary based on the site validating the pass.

Example:

Site BLUE and site GREEN share the Adult Unlimited Pass program, but site ORANGE does not.

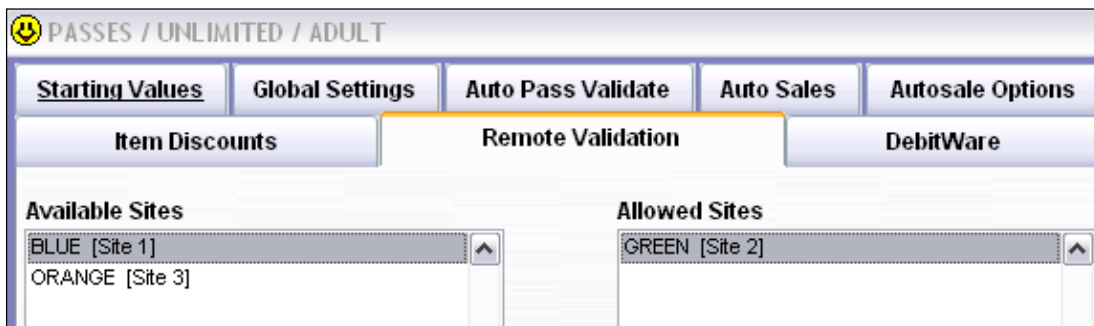
The following screen capture shows the site GREEN **Remote Validation** tab for the Adult Unlimited Pass:



When an Adult Unlimited pass created at site GREEN is scanned at site BLUE, the validation is re-routed back to site GREEN. The Validation Rules for the Adult Unlimited Pass configured at site GREEN confirm that site BLUE is allowed to scan these types of passes. A, “good,” message is returned to the operator at site BLUE.

If an Adult Unlimited Pass created at site GREEN is scanned at site ORANGE, the validation is re-routed back to site GREEN. The Validation Rules for the Adult Unlimited Pass configured at site GREEN confirm that site ORANGE is *not* allowed to scan these types of passes. A, “bad,” message is returned to the operator at site ORANGE.

The following screen capture shows the site BLUE **Remote Validation** tab for the Adult Unlimited Pass:



When an Adult Unlimited Pass created at site BLUE is scanned at site GREEN, the validation is re-routed back to site BLUE. The Validation Rules for the Adult Unlimited Pass configured at site BLUE confirm that site GREEN is allowed to scan these types of passes. A, “good,” message is returned to the operator at Site GREEN.

If an Adult Unlimited Pass created at site BLUE is scanned at site ORANGE, the validation is re-routed back to site BLUE. The Validation Rules for the Adult Unlimited Pass configured at site BLUE confirm that site ORANGE is not allowed to scan these types of passes. A, “bad,” message is returned to the operator at site ORANGE.

Multiple Site Guidelines

The following guidelines should be followed when configuring your network to support multiple sites (a need to run *accesso Siriusware* applications at two or more physical locations). This involves determining your bandwidth needs (both *accesso Siriusware* requirements and your other application requirements) and configuring your network to ensure bandwidth, uptime, and security. Because this is complex and dependent on factors other than

accesso Siriusware requirements, you must use a qualified networking professional to design, configure, and maintain the WAN (Wide Area Network). We highly recommend you have such a professional on your staff. Alternatively, you could hire a consultant to design, configure, and maintain the WAN.

First, you have a decision to make, “Do I use one central *Siriusware* SQL database or use a separate database at each location?”

Using separate databases with a unique site ID number at each location alleviates concerns about WAN bandwidth, uptime, and security and can result in the best performance and reliability. This is our preferred / recommended setup even though it requires configuration and maintenance of the *accesso Siriusware* system at each location. While reporting is more complicated because the data is in separate databases, our clients have solved this by using custom enterprise reporting that utilizes reporting services. However, sometimes conditions exist that merit using a single database choice. The guidelines below address this choice.

Guidelines for using a single database at multiple sites

WAN configuration

It is important that your WAN is configured to ensure bandwidth, uptime, and security:

- 1.5 Mbit/s UP AND DOWN (minimum), 3.0 or more Mbit/s UP AND DOWN (preferred) bandwidth dedicated to each 20 remote salespoints.

Important: any sharing of this service with other applications degrades performance – if you need to share, have MORE than 3.0 Mbit/s and utilize Quality of Service tools to guarantee the minimum for *accesso Siriusware* applications.

- Do not use a connection with high latency (such as a satellite based service)
- Be aware that bandwidth is not guaranteed if you use a Cable or DSL internet connection. It is much better to purchase a point-to-point circuit that has guaranteed bandwidth and uptime.
- Secure and encrypt the data connection(s). See *accesso Siriusware*’s PA-DSS Implementation Guide for more information.
- Plan for and invest in reliability: consider redundant connections, redundant routers, battery backup, etc. Purchasing and configuring redundant WAN connections from separate carriers is highly recommended. You can then configure firewalls and routers to fail over to the other connection if one goes down or to use the two together to increase bandwidth.

The most important consideration is bandwidth management. Regardless of the bandwidth between the remote site and central server, your network must guarantee the above minimum bandwidth for *accesso Siriusware* applications by configuring your router/firewall appropriately. This protects your *accesso Siriusware* applications from being affected by other large data transfers such as downloads or video. The same can be done for ProtoBase traffic to ensure fast credit card authorizations.

In summary, without a reliable WAN, you will not be satisfied with the performance of the accesso Siriusware system and potentially experience data corruption. Your local data may become out of sync with the server data requiring frequent manual rebuilding of the local data.

accesso Siriusware configuration:

The SQL server and the middleware (PoolManager) should be installed at the same physical location that is central and reliable. The SQL Server and middleware components should be connected to each other on a fast LAN connection.

Salespoints can be run remotely – they have fairly low bandwidth requirements. Other *accesso Siriusware* applications (SysManager, ReportManager, etc.) have higher bandwidth requirements. Instead of running these over the WAN, we recommend that you use a remote desktop service to run these applications at the central site on the LAN.

Configuration changes requiring data updates to Sales can take significant bandwidth and be slow, so we highly recommend the use of the `DeferSalesDataUpdates` .INI setting. This makes startup faster.

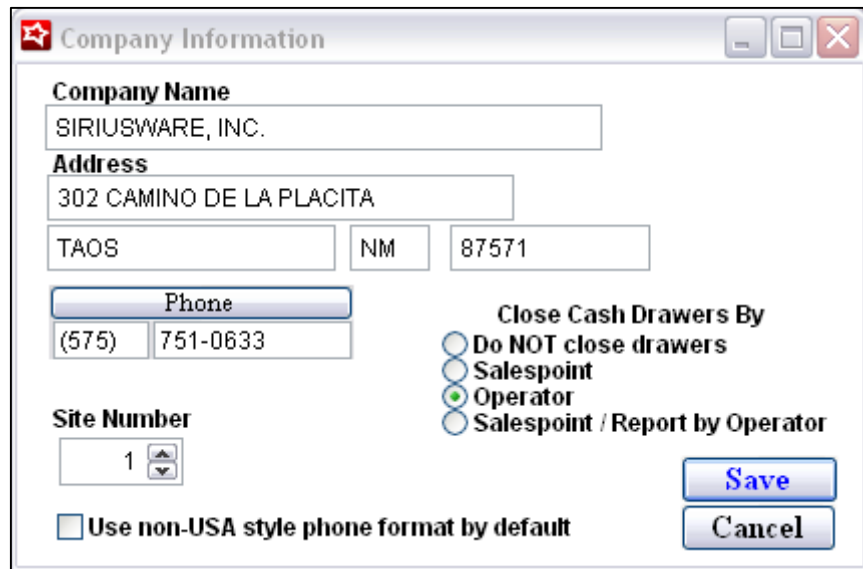
To improve performance we recommend a local layouts and updates folder at each site. This prevents these large files from being transferred across the WAN. The paths in the appropriate .INI files need adjusted to reflect the local file location at each site.

SysManager Preferences menu

Throughout this document the **SysManager > Preferences** menu has been mentioned. Below is a description of the **Preferences** menu options that have an impact on validation.

Company information

Determines the site number embedded in access and pass records. This is important when sharing programs between multiple sites using WAN validation or SQL replication.



Company Information

Company Name
SIRIUSWARE, INC.

Address
302 CAMINO DE LA PLACITA
TAOS NM 87571

Phone
(575) 751-0633

Site Number
1

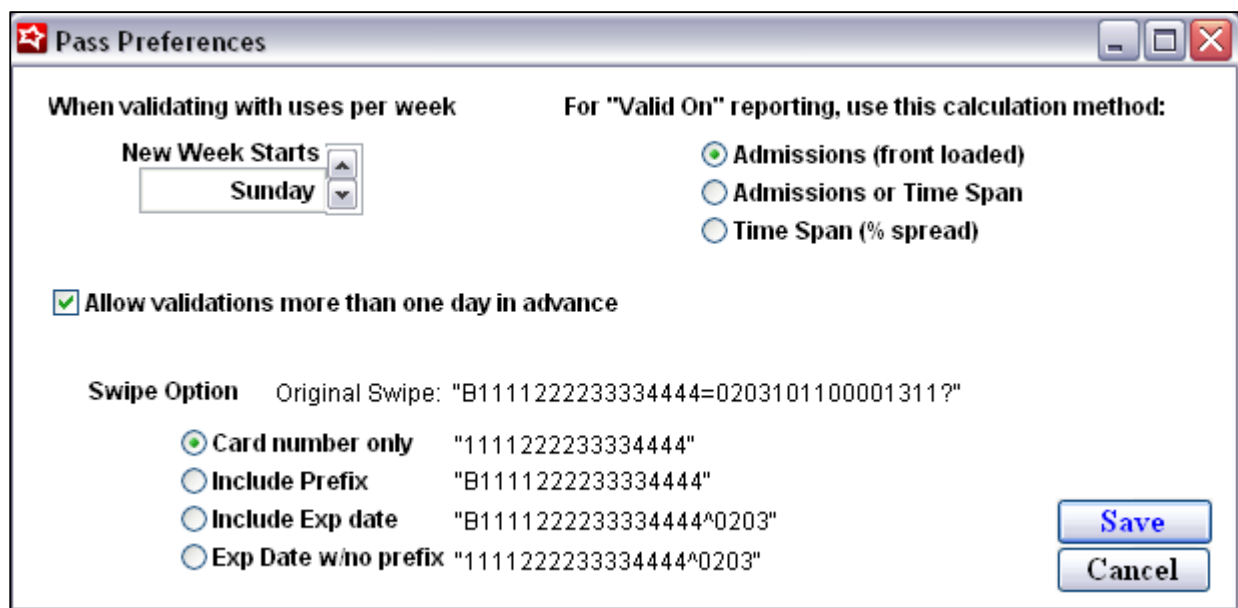
☐ Use non-USA style phone format by default

Close Cash Drawers By
☐ Do NOT close drawers
☐ Salespoint
☒ Operator
☐ Salespoint / Report by Operator

Save **Cancel**

Passes

- **Next Week Starts** impacts when **Weekly Uses** are reset.
- **Allow validations more than once day in advance** impacts how far into the future a daily use may be deducted when future validations are allowed in programs involving validation with a DCI.
- **Swipe Option** determines the format of how swiped card numbers are stored in the data.
- **For “Valid On” reporting, use this calculation method:** determines the method used for valid on reporting involving items with admissions or time spans > 1.



Pass Preferences

When validating with uses per week
New Week Starts
 Sunday

☒ **Allow validations more than one day in advance**

For “Valid On” reporting, use this calculation method:
☒ Admissions (front loaded)
☐ Admissions or Time Span
☐ Time Span (% spread)

Swipe Option Original Swipe: "B1111222233334444=0203101100001311?"

☒ **Card number only** "1111222233334444"
☐ **Include Prefix** "B1111222233334444"
☐ **Include Exp date** "B1111222233334444^0203"
☐ **Exp Date w/no prefix** "1111222233334444^0203"

Save **Cancel**

Access Control

- The **Access Control** grid specifies the lettered prefix used in layouts that distinguishes the various types of numbers used in validation programs. Based on the prefix, the validation is directed to the appropriate table to determine the *rules* for validating the item.

Note: The **Log Table** and **Remote IP** fields are no longer necessary in version 4.4.

- **Ignore successive re-scans of the same pass by the same scanner** is beneficial in gate scanning that involves RF chips. Depending on the sensitivity of the RF reader, the chip embedded in a card may be read multiple times in quick succession. This can cause “first” and “subsequent” validations to occur within seconds of each other. If the product is configured to deduct values each time the pass is scanned, then the subsequent validations may fail and essentially prevent the turnstile from flipping as expected.
- Every time a scanner (not a salespoint) calls SalesEZ’s **CheckPass** function, SalesEZ application keeps a record, by operator, in the **lastscan** table that records the prefix, pass number and response when **CheckPass** is finished. Every time **CheckPass** is called, it first checks the **lastscan** table (if the **Ignore successive re-scans of same pass by the same scanner** check box is checked) to see if the same operator is submitting the same prefix number and pass number. If so, then it simply returns **RESCAN** with the original response. Note that this is only by operator. If the same pass is immediately rescanned on a different scanner with a different operator log-in, it’s not considered a rescan. This functionality applies to access items as well as passes.
- **Do not do “cascading” validations if the # sent in is invalid (guest# will always cascade)** allows cascading validation of *pass* numbers to be turned on or off based on auto-validation (self-validating) or validation with a DCI.
- **Stop cascade if pass record scanned is voided** activates a verification of the pass record **Voided By/Voided For** fields. If these fields are empty the cascade proceeds. If they are populated, the cascade stops and the validation fails. This option is available when validating with *pass*, *addit_no*, *swipe_no* or card numbers.

Access Control Preferences

Prefix Table

	Pass Table	Key Field	Info Table	Log Table	Remote IP	x.x.x.x:pppp
	GST_PASS	PASS_NO	GUESTS	GST_ACTV		
A	ACCESS	PASS_NO				
P	GST_PASS	PASS_NO	GUESTS	GST_ACTV		
R	ACCESS	ADDIT_NO				
S	GST_PASS	SWIPE_NO	GUESTS	GST_ACTV		
Z	GST_PASS	ADDIT_NO	GUESTS	GST_ACTV		

☐ Ignore successive re-scans of the same pass by the same scanner

Do not do "cascading" validations if the # sent in is invalid (guest# will always cascade)

☒ WHEN SELF-VALIDATING

☐ WHEN VALIDATING WITH A DCI

☒ Stop cascade if pass record scanned is voided

New

Delete

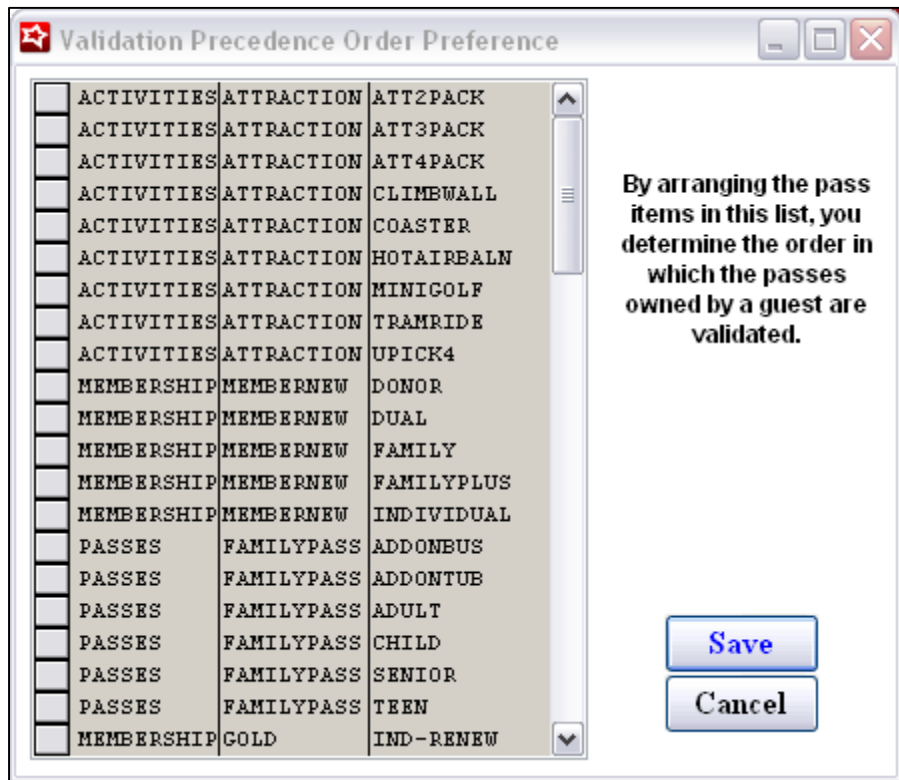
Save

Cancel

Note: The **Log Table** and **Remote IP** fields are no longer necessary in version 4.4. The **Log Table** fields, highlighted in the screen capture, may be populated by default but are blank, as described in the following known issue: http://portal.siriusware.com/docs/kb-pdf/Known_issues/SysManager_2008_Dec_23.pdf.

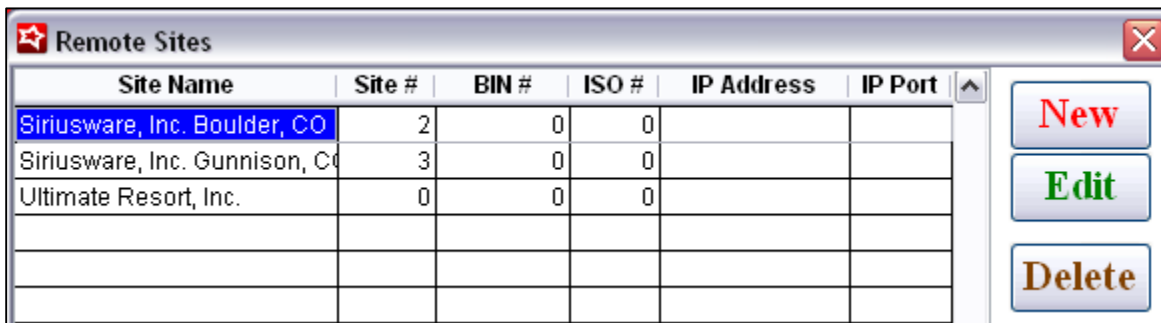
Validation Precedence

- Used to determine the order in which pass records are validated when using cascading validation with *card* numbers.



Remote Site Setup (WAN Validation)

- Used in WAN validation programs as well as multi-site businesses that share programs via SQL Replication. See [WAN Validation Site Restrictions](#) and [SQL replication site restrictions](#).



Barcodes and magswipes

In order for any validation program to be successful, the barcodes and magswipes used in the program must be properly encoded. Thorough testing of barcodes and magswipes *must be done* before launching any validation program!

The format of the barcode or magswipe is determined by the functionality required by the validation program (for instance, Auto Sales vs. automated discounts) and the location of the validation (within Sales or within ScanMan or GateKeeper modules).

Because a single card may be used in many different programs and also be scanned or swiped using multiple options (Sales scanner or keyboard swipe, Symbol unit, gate scanner) it is often helpful to encode both a barcode and a magswipe for use in different programs.

Barcode and magswipe considerations

Access Control prefixes

When creating a field on a layout in order to print barcodes or encode magswipes, it is important to always include the appropriate Access Control prefix. These prefixes are found in **SysManager > Preferences > Access Control**. The prefix is vital in directing the validation to the correct table and template (`access` vs. `gst_pass` tables). The default prefixes are listed below although these can be edited if necessary.

- Blank (nothing) or **P** for pass numbers
- **G** for guest numbers
- **A** for access numbers
- **S** for swipe numbers
- **Z** for `Addit_No` numbers

Sales auto command prefixes

Sales Auto Command Prefixes are used to trigger automated functions in Sales. These prefixes are *only* used in barcodes or magswipes that are scanned or swiped in Sales. These are *not* used when scanning barcodes remotely with a Symbol or gate scanner.

- **%E** - Used to trigger automated discounts with the scan/swipe of a pass (see pass global settings section above or [how to... guide](#) below)
- **%A** – Used to trigger the auto-sale of an item with the scan/swipe of a pass. (see [Pass Auto Sales](#) section above)
- **%R** – Used to perform automated retail inventory lookups with the scan of a retail barcode
- **%B** – Used to trigger finalization. Most commonly encoded into magswipes of In-House Cards items. Also used when encoding sixteen digit card numbers for use in Card Activity Table Functionality programs.

While these prefixes are often included in the barcode or magswipe of a pass or ticket, they can also be programmed as a prefix within salespoint scanners. But, adding the auto-command prefix to a scanner limits the ability to use more than one auto command prefix at a single point-of-sale. Other options for Sales auto command prefixes include configuring hot keys (**F10**, **F11** or **F12**) in Sales.

Example:

A pass can be swiped in Sales to auto-sell single day tickets and it can be swiped in Sales to automate discounts. Track 1 of the magswipe is encoded with %AP plus the unencrypted pass number. Track 2 is encoded with just the unencrypted pass number because track 2 can only encode numbers. In order to send in the %E auto command necessary for discounts, a hot key is configured for Sales. The Sales32c.INI [Preference] settings that are required for this hot key configuration are:

```
F12Text="%E"
F12Track=2
F12Prompt="Please Swipe Pass"
```

When the operator needs to auto sell a ticket, she simply swipes the pass. When the operator needs to discount items in a sale, she pushes the **F12** key, and then swipes the pass.

Pass number encryption in barcodes

Encryption allows very long numbers to be encoded into relatively small barcodes. Typically barcodes (pass and access) are encrypted. In order to be able to scan encrypted barcodes in Sales, the setting EncryptedPassNumbers=TRUE must be included within the [Preferences] section of the Sales32c.INI file. Only barcodes are encrypted, magswipes are never encrypted.

accesso recommends that clients follow these guidelines when deciding whether to encrypt numbers:

- Scanning at handheld scanner or gate – Encrypt numbers
- Scanning/swiping at a salespoint – Unencrypt numbers

For more information on encryption, see the *Salesware Access Control* document.

Encrypted barcode hot key configuration

For a pass that is using an encrypted barcode

```
BC_CODE128( 'PXX'+dec2baseXX(gst_pass.pass_no))
```

The following .INI Setting allows for this item to Autosell when the hot key is selected and the pass barcode is scanned. The scan is not pre-encoded with a prefix.

```
[Preferences]
EncryptedAutoCommand=False
EncryptedAutoCommandXXOnly=True
```

```
EncryptedPassNumbers=True  
EncryptedManualEntry=True
```

```
F11Strip=3  
F11Text=%APXX  
F11Prompt= Scan Pass
```

A few other .INI settings to verify

- NoDecryptPrefixes= (if A or P are set in here, you receive error messages – it needs to be blank or A and P need to be removed)
- PassPrefix=
- AutoPassPrefix=A
- F11Track=0
- Works with Scanners that are programmed with prefixes. For example, %R just needs a change to the F11Strip to add in the addition prefixes.

Example:

Scanner not programmed

```
F11Strip=3
```

Scanner programmed with %R

```
F11Strip=5
```

Fields for a typical pass program

A typical pass program involves:

- Allows access to the venue by scanning a barcode via a Symbol or gate scanner.
- Offers discounts on various items by swiping a pass in Sales.
- Access Control prefix used for pass numbers is P.

The program above would require adding the following two fields to the pass layout for the barcode and magswipe:

1. Barcode: Access Control prefix followed by an encrypted pass number. This creates a barcode that is scanned by a Symbol or gate scanner: `BC_CODE128( 'PXX'+dec2baseXX(gst_pass.pass_no) )`
2. Magswipe: Sales auto command prefix for discounts followed by the Access Control prefix followed by an unencrypted pass number. This is swiped in Sales:
`"~1%EP"+alltrim(str(gst_pass.pass_no,16,0))+""`

Note: There is an obscure Sales32c .INI [Preferences] setting that allows the same encrypted barcode to be scanned with a remote scanner (Symbol unit or GateKeeper scanner) for lift/venue access and also be scanned with a salespoint scanner in order to trigger the %E Sales auto command functionality. This particular setting helps in situations where encoding magswipes in order to implement the %E auto command discounting is not an option. The setting is EncryptedAutoCommand=TRUE. For more information, see the *Salesware .INI Settings Reference* document.

Only use this type of program implementation if encoding a magswipe for salespoint use is not an option!

Anatomy of a barcode

The following is a typical **Graphic Pass Layout Barcode** field. This particular barcode is designed to be scanned with Symbol or gate scanners: BC_CODE128('PXX'+dec2baseXX(gst_pass.pass_no)) .

The following table lists and describes the elements:

Element	Description
BC_CODE128	Encrypted font used for barcodes.
P	Access Control prefix (designated in the SysManager > Preferences > Access Control).
XX	Used to bypass the expiration date check. See following description after the table.
dec2baseXX	Further encryption to create even smaller barcodes.
gst_pass.pass_no	Actual field containing the pass number.

Barcodes may or may not have the expiration of the pass *physically written* into the barcode. When an expiration date is physically written into a barcode, the first thing that happens when a pass is scanned is a verification that the expiration date included in the barcode is still in the future. As long as the expiration date is still in the future, the number is sent to SalesEZ application for validation. If the expiration date written into the barcode is in the past, the validation immediately fails and the pass number is not sent to SalesEZ application for validation.

Normally, pass records *never* include an expiration date within the barcode and thus the pass number is always sent to SalesEZ application for validation – thus XX is inserted immediately after the Access Control prefix to bypass expiration date checking. However, access records often include the expiration date within the barcode. Including expiration dates in access barcodes helps to prevent fraud when scanners are off-line because the expiration date physically written into a barcode can be used to distinguish expired from non-expired tickets even if the scanners are disconnected from SalesEZ application.

Careful consideration must be made when choosing to include expiration dates in barcodes. Because the expiration date calculated at the time of sale is physically written into the barcode, even if an expired access record

is edited in SysManager in order to extend its valid dates, the scan of the matching access barcode still fails. The updated access record within the server data is never checked because the original expiration date written into the barcode causes the validation to immediately fail. If it is a common practice to alter expiration dates of tickets for guests (due to guest service issues or operator error), the expiration date is not included in the **layout** field for access barcodes and XX is inserted directly after the Access Control prefix instead.

Note: Expiration dates written into barcodes work with the rollover setting included in ScanMan module. Please consult the *Salesware Access Control* documentation for details regarding how to use expiration dates in barcodes with rollover settings.

For more information, see the *Salesware Layouts* document.

ScanMan and GateKeeper modules

ScanMan and GateKeeper are both remote scanning applications. ScanMan module runs on Symbol scanning units and GateKeeper module runs on PCs integrated with turnstiles. Both applications are used with auto-validation programs. For detailed information on how to install and configure ScanMan and GateKeeper modules, see the *Salesware Access Control* document.

Invalid Pass List (Hotlist)

You create the Invalid Pass List from **SysManager > Activities > Pass Activities > Create Invalid Pass List**. This list is then loaded by ScanMan module upon start-up once connected to SalesEZ application. The Invalid Pass List allows a Symbol unit to be taken to locations where there is no network connection and scan passes and tickets off-line. The **Hotlist**, as it is sometimes called, prevents invalid *passes* (not access records) from scanning “good” in this off-line situation. Up to 25,000 invalid passes can be loaded into the hotlist. Passes are loaded into the hotlist based on the following conditions:

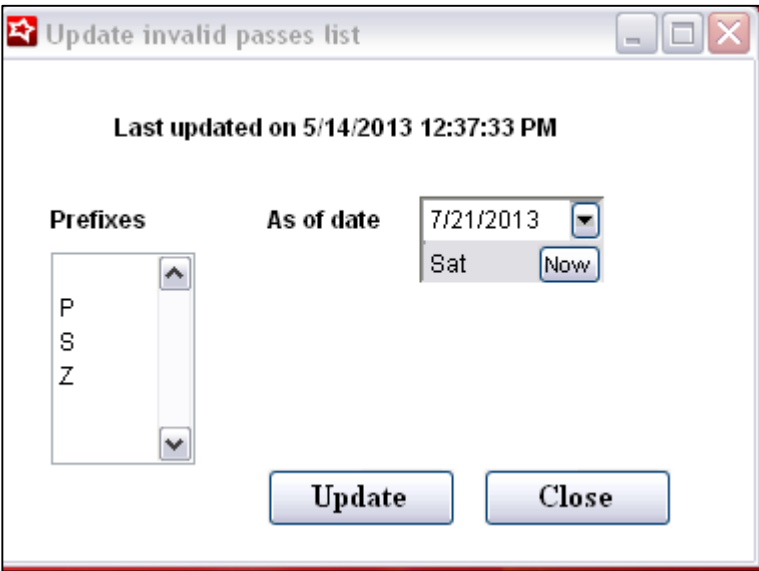
1. Expired passes are *not* loaded into the hotlist (this would cause the list to become too big and unusable).
2. **Voided For** and/or **Voided By** passes *are* loaded into the hotlist.
3. Passes that have an individual **Blackout Date Range** set on their pass record *are* loaded into the hotlist, assuming that the hotlist is generated during the individual blackout date range.
4. Passes whose *template* includes a blackout range of dates are loaded into the hotlist, assuming that the hotlist is generated during one of the template blackout date ranges.
5. Passes whose *template* is not valid for certain days of the week are loaded into the hotlist assuming the hotlist is generated on one of the invalid days of the week.
6. When a hot pass list is generated, only those voided passes sold at a particular site are included. The hot pass list does not include multiple sites.

The Invalid Pass List can be viewed from **ReportManager > Reports > Pass Reports > Hot Pass List**. With this report you can print all invalid passes at a particular site (as defined in **SysManager > Preferences > Company Information > Site Number**) and you can choose to print all voided passes or all passes voided for a specific

reason, like fraud. The **ReportManager - Reports/Pass - Invalid Passes** security setting available from **SysManager > Preferences > Security > New > Edit a Role** allows operators to generate a new Hot Pass List Report in ReportManager.

To create the Invalid Pass List:

- 1. In SysManager, go to **Activities > Pass Activities > Create Invalid Pass List**.
- 2. Create a list of passes that are to be included in the Invalid Pass List by specifying the Access Control prefix used in pass programs and the **As of date**.
- 3. Click the **Update** button in order to update the existing Invalid Pass List with current information based on the criteria selected.



- 4. The Invalid Pass List is stored within the server data in a table called **hot list**.
- 5. Upon startup and connection to SalesEZ application, the most recent copy of the hotlist is loaded by ScanMan module for use in off-line scanning situations.
- 6. A barcode encoded with ***SETHOTLIST*** (see the following sample) may be scanned in order to check the number of pass records included in the hotlist loaded on the scanning unit to the number of records within the hotlist in the server data in order to help verify that the most recent copy of the hotlist is loaded.



Results of using the Hotlist:

- When scanning a pass that is included in the hot list, the following information is displayed on the Symbol scanner:

HOTLIST

<Pass number>
This pass is hotlisted.

- Expired passes still scan “good” in offline situations even when using the hotlist functionality. This is because expired passes are not included in this list in order to keep it to a reasonable size.

Reports

Reports specific to scanning and validation are located in **ReportManager > Reports > Pass Reports**. These include: **Pass Activity**, **Access Activity**, **Scan Activity**, **Scan Detail**, **Scanned Usage** and **Hot Pass List**. There are two other reports under this menu that are also related to validation programs but do not specifically record validation information: **Non-renewed Passes** and **Remaining Unit Values**.

Pass Activity Report

The Pass Activity Report displays detailed information for the passes specified.

Sample filter options:

The screenshot shows the 'Report Criteria' tab of the Pass Activity Report. It includes a 'Sort By' section with radio buttons for 'Guest Name', 'Operator', 'Guest Number', 'Sales Point', and 'Dept, Cat, Item' (which is selected). Below this are 'From' and 'To' date and time pickers. The 'From' date is 12/31/2011 11:03:57 AM, and the 'To' date is 5/14/2013 11:03:57 AM. There are also buttons for 'Now', 'BOD', and 'EOD'. Below the date pickers are checkboxes for 'Guest Names' (checked) and 'Guest Numbers' (unchecked). Each checkbox has a corresponding 'From' and 'To' text input field. At the bottom, there is a 'Pass #' input field with the value '0' and a 'Print Totals' checkbox.

The screenshot shows the 'Report Criteria' tab of the Pass Activity Report, focusing on the 'Show the following activity:' section. It lists several activities: 'New Pass', 'Modify Pass', 'Renew Pass', 'Rejoin Pass', '1st Print Pass', 'Re-Print Pass', and 'Validate Pass'. To the right of this list are two buttons labeled 'Presets: Photos and Printing' and 'Usage'. Below the activity list is a 'Clear Selections / Show All' button. At the bottom, there is a 'Custom Filter' text input field and a button with three dots. Below the input field, it says 'Tables available for custom filter: acc_actv a, gst_actv a'.

Report Criteria	Additional Filters 1	Additional Filters 2
☒ All operators ☐ Range ☐ Group Range through Group		
☒ All salespoints ☐ Range ☐ Group Range through Group		

Sample output:

Pass Activity Report						
12/31/2011 to 5/14/2013 , "DOE" to "DOE" , All Guest Numbers, All Activity						
Salespoints: All						
Operators: All						
Date	Guest #	Guest Name	Action	Value	Sales Pt.	Operator
ITEM: Individual						
Pass #53004001						
5/14/2013 10:38:19 AM	13001001	JANE DOE	NewPass	0	TICKET	ADMIN
5/14/2013 10:39:28 AM	13001001	JANE DOE	Modify Pass	0	TICKET	ADMIN
ITEM: Adult Pass						
Pass #48004001						
5/3/2013 8:55:30 AM	13001001	JANE DOE	NewPass	0	TICKET	ADMIN
Pass #49004001						
5/3/2013 8:55:30 AM	13001001	JANE DOE	NewPass	0	TICKET	ADMIN
ITEM: Child Pass						
Pass #50004001						
5/3/2013 8:55:30 AM	6004001	FRANKIE DOE	NewPass	0	TICKET	ADMIN
Pass #51004001						
5/3/2013 8:55:30 AM	7004001	GEORGE DOE	NewPass	0	TICKET	ADMIN
ITEM: Teen Pass						
Pass #52004001						
5/3/2013 8:55:30 AM	8004001	TULIP DOE	NewPass	0	TICKET	ADMIN

Access Activity Report

Displays detailed information for a single access record.

Sample filter options:

Report Criteria

Additional Filters

Access Record #

52004001

☒ All operators

☐ Range

☐ Group

Range

through

Group

☒ All salespoints

☐ Range

☐ Group

Range

through

Group

From

12/31/2011 8:55:27 PM

To

7/20/2013 8:55:27 PM

Sat

Now

BOD

EOD

Sat

Now

BOD

EOD

Report Criteria

Additional Filters

Show the following activity:

New Guest

Modify Guest

Delete Guest

Delete Duplicate

ID Card Printed

Notify Guest On Sale

Notify Guest On Reservation

Select the items you wish to report on. If nothing is selected, all will be included.

Clear Selections / Show All

Custom Filter

Tables available for custom filter: acc_actv L, access a

Sample output:

Access Record Activity Report				
For Access Record Number: 52004001				
12/31/2011 to 7/20/2013 , All Activity				
Salespoints: All				
Salespoints: All				
Date	Action	Value	Sales Point	Operator
4/11/2012 4:53:51 PM	NewPass		TICKET	ADMIN

Scan Activity Report

This report provides summary or detailed information on the total number of scans sorted by Access Control prefix, item description or pass number.

Sample filter options:

Report Criteria	Additional Filters
1/1/2012 8:58:58 PM ▼ Through 7/20/2013 8:58:58 PM ▼ Sun Now BOD EOD Sat Now BOD EOD	
Sort By: ☐ Barcode Prefix ☒ Product Description ☐ Pass# ☐ Show detail	

Report Criteria	Additional Filters
☐ Exceptions Tables Prefixes Through	
☒ All operators ☐ Range ☐ Group Range ▼ through ▼ Group ▼	
☒ All salespoints ☐ Range ☐ Group Range ▼ through ▼ Group ▼	
Custom Filter ...	
Tables available for custom filter: acc_Actv L, gst_actv L	

Sample output:

SCAN ACTIVITY BY PRODUCT DESCRIPTION

1/1/2012 8:58:58 PM to 7/20/2013 8:58:58 PM

Barcode Prefixes: First One Through Last One

Salespoints: All

Operators: All

Type*	Product Description	
P	1 Day Per Week Pass	1 Scans
P	15 Day Pass	1 Scans
P	Adult Unlimited Pass	11 Scans
P	Discount Card	3 Scans
P	Donor	1 Scans
P	Employee Pass	1 Scans
P	Every 7th Free Pass	3 Scans
P	Family Gold Member	3 Scans
P	Family Plus	9 Scans
P	Frequent Visit Pass	6 Scans
P	Group Charge Cards	1 Scans
P	Individual Gold Member	4 Scans
P	Individual Platinum Mbr.	8 Scans
P	Individual Silver Member	4 Scans
P	Linked Pass	5 Scans
P	Master Pass (20 Uses)	44 Scans
P	Unit Value 5 Day Pass	3 Scans
P	Weekday Only Pass	7 Scans
P	Youth Unlimited Pass	2 Scans
T	2 Day Group Ticket	1 Scans
T	3 Day Adult Ticket	67 Scans
T	3 Pack	4 Scans
T	Adult Consignment Voucher	7 Scans
T	Child Consignment Voucher	3 Scans
T	Climbing Wall	1 Scans
T	Roller-Coaster	1 Scans
T	Scenic Tram Ride	1 Scans
T	Senior Consignmnt Voucher	3 Scans
T	U-Pick 4	7 Scans
212 Scans On This Report		53 Scanned Days

Scan Detail Report

This report provides detailed information per scan (such as operator and location). Can be sorted several ways and run for access and/or pass records as well as valid and/or invalid scans.

Sample report filters:

Report Criteria

Additional Filters

From

To

5/1/2012 6:20:32 PM

7/21/2013 6:20:32 PM

Tue

Now

BOD

EOD

Sun

Now

BOD

EOD

Report On

Show Only

☒ Pass Record

☐ Access Record

☐ Both Pass & Access

☐ Valid Scans

☐ Invalid Scans

☒ Both Valid & Invalid

Sort By

Pass/Access #

Report Detail

Scans/Names

Detailed Scanning Report

Printer: Default Printer

Report Criteria

Additional Filters

☐ Filter Physical Scan Location

Through

Through

☒ All operators
 ☐ Range
 ☐ Group

Range

through

Group

☒ All salespoints
 ☐ Range
 ☐ Group

Range

through

Group

Custom Filter

Tables available for custom filter: *_actv a, gst_pass/access p

Export

Preview

PDF

Print

Add 2 Q

Cancel

Sample output:

DETAILED SCANNING REPORT								
DATE: 5/1/2012 6:20:32 PM to 7/21/2013 6:20:32 PM								
SORT BY: Pass/Access #								
REPORT ON: Pass Records Only								
SHOW ONLY: Both Valid and Invalid Scans								
LEVEL OF DETAIL: Total # of Scans and Guest Names								
PHYS LOCATIONS: First One THROUGH Last One								
SALES POINTS: All								
OPERATORS: All								
Guest Number	Guest Name	Pass/Access Number	Dept/Cat/Item	Valid/Invalid Scan	Operator	Scan Location	Date Scanned	# Times Scanned
Pass Records								
5000001	LARMORE, MECHELE	12001001	INHOUSECRD/GUESTCARDS/GRP CA	OK	ADMIN	TICKET	6/27/2012	1
12000001	GORING, LISA	16004001	MISCCRDPRG/SHAREDVALUMASTE	OK	GATE01	01	6/29/2012	1
12000001	GORING, LISA	16004001	MISCCRDPRG/SHAREDVALUMASTE	OK	GATE01	01	6/29/2012	1
12000001	GORING, LISA	16004001	MISCCRDPRG/SHAREDVALUMASTE	OK	GATE01	01	6/29/2012	1
12000001	GORING, LISA	16004001	MISCCRDPRG/SHAREDVALUMASTE	OK	GATE01	01	6/29/2012	1
12000001	GORING, LISA	16004001	MISCCRDPRG/SHAREDVALUMASTE	OK	GATE01	01	6/29/2012	1
12000001	GORING, LISA	16004001	MISCCRDPRG/SHAREDVALUMASTE	OK	GATE01	01	6/29/2012	1
12000001	GORING, LISA	16004001	MISCCRDPRG/SHAREDVALUMASTE	OK	GATE01	01	6/29/2012	1
12000001	GORING, LISA	16004001	MISCCRDPRG/SHAREDVALUMASTE	OK	GATE01	01	6/29/2012	1
12000001	GORING, LISA	16004001	MISCCRDPRG/SHAREDVALUMASTE	OK	GATE01	01	6/29/2012	1
12000001	GORING, LISA	16004001	MISCCRDPRG/SHAREDVALUMASTE	OK	GATE01	01	6/29/2012	1
12000001	GORING, LISA	16004001	MISCCRDPRG/SHAREDVALUMASTE	OK	GATE01	01	6/29/2012	1
12000001	GORING, LISA	16004001	MISCCRDPRG/SHAREDVALUMASTE	OK	GATE01	01	6/29/2012	1
12000001	GORING, LISA	16004001	MISCCRDPRG/SHAREDVALUMASTE	OK	GATE01	01	6/29/2012	1

Scanned Usage Report

Displays count of total unique passes and access records scanned as well as total scans per pass type.

Sample report filters:

Report Criteria

Date Filter

11/30/2012 6:25:02 PM Through 7/21/2013 6:25:02 PM

Fri Now BOD EOD Sun Now BOD EOD

Item Filter

From To

Departments: TICKETS TICKETS

Categories: All Categories ZZZ-CMPTS

Items: All Items YTHUNLMTD

☒ Summarize all dates ☐ Separate reports for each day

Report Criteria

Additional Filters

☒ All operators ☐ Range ☐ Group

Range through

Group

☒ All salespoints ☐ Range ☐ Group

Range through

Group

☐ Filter Physical Scan Location Through

☐ Show Net Sales on report

Custom Filter

Tables available for custom filter: acc_actv+gst_actv ac, gst_pass+access a

Sample report output:

Scanned Usage Report					
10/29/2011 6:25:02 PM to 7/21/2013 6:25:02 PM					
DEPARTMENTS: TICKETS THROUGH TICKETS			OPERATORS: All		
CATEGORIES: All Categories THROUGH Last One			SALE SPOINTS: All		
ITEMS: All Items THROUGH Last One			PHYS LOCATIONS: First One THROUGH Last One		
Department / Category	Item	Description	Passes	Scans	Admissions
TICKETS					
ADULT	3DAY	3 Day Adult Ticket	2	34	2
Totals for Category: ADULT			2	34	2
GROUP	2DAY	2 Day Group Ticket	1	1	30
Totals for Category: GROUP			1	1	30
Totals for Department: TICKETS			3	35	32
Grand Totals:			3	35	32

Non-renewed Passes Report

This report displays a list of guests who own only expired passes of the selected DCI. (Helpful in generating a guest call list to promote pass sales to those guests who have purchased passes in previous years/seasons.)

Sample report filters:

Report Criteria	Additional Filters
Guest's Latest Pass Expired Between These Dates	
12/31/2011 12:20:24 PM Sat Now BOD EOD	And
5/14/2013 12:20:24 PM Tue Now BOD EOD	
Item Filter	
From Departments: PASSES Categories: DISCCRDPRG Items: All Items	To PASSES DISCCRDPRG YTHUNLMTD

Sample output:

Non-renewed Passes						
DEPARTMENTS: PASSES THROUGH PASSES						
CATEGORIES: All Categories THROUGH DISCCRDPRG						
ITEMS: All Items THROUGH YTHUNLMTD						
Only passes of the same DCI type						
Name	Guest #	Parent #	Dept	Cat	Item	Pass No
DOE, JANE 123 HAPPY RD. GETTYSBURG, PA 17325	13001001 <i>Born</i> 1/1/1977 12:00:00	13001001 (222) 232-2222	PASSES	LIMITED	1DAYPERWK	55004001
LEE, SEAN 302 CAMINO DE LA PLACITA TAOS, NM 87571	35000001 <i>Born</i> null	35000001 (575) 751-0633	PASSES	LIMITED	1DAYPERWK	40001001
STONE, RYAN ,	34000001 <i>Born</i> null	34000001	PASSES	LIMITED	1DAYPERWK	23004001
3 Passes On This Report						

Remaining Unit Values Report

This report shows the number of points remaining on expired passes configured for “unit value” programs. After previewing or printing the report, the operator is prompted to “zero-out” remaining points on expired cards.

Sample report filters:

Report Criteria

Passes Expired Between These Dates

11/30/2011 12:23:10 PM
Wed Now BOD EOD

And

5/14/2013 12:23:10 PM
Tue Now BOD EOD

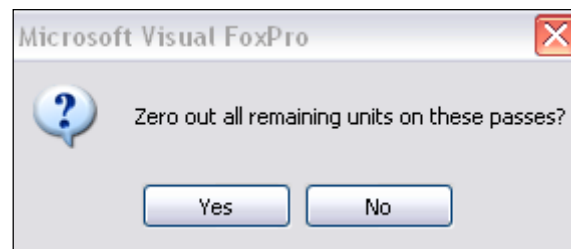
Item Filter

	From	To
Departments:	All Departments ▼	TUBING ▼
Categories:	All Categories ▼	ZZZ-CMPTS ▼
Items:	All Items ▼	YTHUNLMTD ▼

Additional Filters

Sample output:

Expired Passes with Remaining Unit Values									
DEPARTMENTS: All Departments THROUGH TUBING CATEGORIES: All Categories THROUGH ZZZ-CMPTS ITEMS: All Items THROUGH YTHUNLMTD									
Pass #	Dept	Cat	Item	Guest #	Guest Name	Points1	Money1	Points2	Money2
31004001	MISCCRDPR	UNITVALUE	UV5DAYPAS	7000001	SIMMERSON, ED	7	\$249.97		
32004001	MISCCRDPR	UNITVALUE	UV5DAYPAS	7000001	SIMMERSON, ED	6	\$214.26		
Totals:						13	\$464.23	0	



Supplemental information

How to... guide for employee discounts with a pass swipe

Step 1: Set up your specials

Start by setting up the appropriate specials. Make sure to set up the correct discount amount and limit the special to the correct salespoint type (if applicable).

The following screen captures show how to configure a 50% employee food discount:

Special

Name: EMPFOOD Description: EMPLOYEE FOOD

General Type Restrictions Source Codes Marketing Codes Security Dept/Cat Link

Min Security To Sell: 0 User Defined:

Discount: 50.00 % And/Or: \$0.00

Set Final Price: \$0.00

Dynamic Rule: ** No Dynamic Special Rule **

Adjust To: 0.00 Price Adjustment usage Notes ...

☐ Source code required to apply this special
☐ Marketing code required to apply this special
☐ Force validation when applied (requires optional validation on the item)

Save Cancel

Special

Name: EMPFOOD Description: EMPLOYEE FOOD

General Type Restrictions Source Codes Marketing Codes Security **Dept/Cat Link**

Department: ACTIVITIES Add Del

Category:

FBCAFE	CANDY
FBCAFE	COLDFOOD
FBCAFE	DRINKS
FBCAFE	HOTFOOD
FBCAFE	SNACKS
FBCOFFEE	ESPRESSO
FBCOFFEE	MODIFIERS
FBCOFFEE	TEAS
FBTABLE	APPETIZERS
FBTABLE	DESSERTS
FBTABLE	MAINCOURSE
FBTABLE	MODIFIERS
FBTABLE	SOUPSSALAD

Save Cancel

The following screen captures illustrates a 20% employee retail discount:

Special

Name: EMPRETAIL Description: EMPLOYEE RETAIL

General Type Restrictions Source Codes Marketing Codes Security Dept/Cat Link

Min Security To Sell: 0 User Defined:

Discount: 20.00 % And/Or: \$0.00

Set Final Price: \$0.00

Dynamic Rule: ** No Dynamic Special Rule **

Adjust To: 0.00 Price Adjustment usage Notes ...

☐ Source code required to apply this special
☐ Marketing code required to apply this special
☐ Force validation when applied (requires optional validation on the item)

Save Cancel

Special

Name: EMPRETAIL Description: EMPLOYEE RETAIL

General Type Restrictions Source Codes Marketing Codes Security **Dept/Cat Link**

Department: ACTIVITIES Add Del

Category:

☒	RETAIL	SOUVENIRS
☐	RETAIL	SUPPLIES
☐	RETAIL	TEAMCLOTH
☐	RETAIL	WMENSCLOTH
☐	RETAIL	MENSCLOTH
☐	RETAIL	BK-CHILD
☐	RETAIL	BK-HISTORY
☐	RETAIL	BK-TRAVEL

Save Cancel

Step 2: Set up your pass (discount card)

- Create the employee pass item and go into the **Action Specifics** button.
- Click on the **Global Settings** tab and enter a macro that auto applies the applicable specials with a swipe of the pass.
- An unlimited number of specials may be entered in this macro. Two specials are used in this example: the employee food discount and the employee retail discount. The **IGNOREERRORS()** piece of the macro prevents operators from getting annoying messages each time a special fails due to restrictions.
- When entering the nickname of a special within the macro, make sure to pad the nickname out to ten characters.
- Also, use **GLOBALSPECIAL()** if the special listed is configured as a global special and use **SELECTIVESPECIAL()** if the special listed is specifically linked to certain items.
- It is also recommended that **Check for Void and Date Range** is selected from the dropdown just above the **Sales Screen action to execute when this item is validated** box. This prevents a pass holder from getting the specified discounts if their pass has expired or has been voided for some other reason.

PASSES / EMPLOYEE / EMPLOYEE

Global Setting For All Passes

Uses Per Day: 0
Uses Per Week: 0

☒ Monday ☒ Friday
☒ Tuesday ☒ Saturday
☒ Wednesday ☒ Sunday
☒ Thursday

Times: : :
☐ Enforce time part of start/end date

Credit Card Program ID:

Black Out Dates: / / / / / /

Layout: CURRENTPASSEMP.FRX
Prefer:

Revenue Recognition Rule: ** No Revenue Recognition **

☐ Create check point log entry when validating
☐ Allow "on-the-fly" discounting

Sales Screen action to execute when this item is validated: Check for Void and Date Range

IGNOREERRORS(SELECTIVESPECIAL("EMP RETAIL"))
IGNOREERRORS(SELECTIVESPECIAL("EMP FOOD"))

Save
Cancel

The macro reads:

```
IGNOREERRORS( )SELECTIVESPECIAL( ' EMPDSCFOOD ' )SELECTIVESPECIAL( ' EMPDSCRET ' )
```

Step 3: Create the necessary field on the pass layout

There are a couple of options for encoding the pass number into the magswipe. The main issues to consider are whether or not the pass magswipe is used in more than one type of program and ease of use for your operators.

Options:

1. Encode the pass number with a prefix that triggers the discount action

Or

2. Set up a hot key that sends in the discount prefix and just encode the pass number

Note: Track 1 can encode letters and numbers and track 2 can only encode numbers.

Option #1 – Encode the discount prefix and pass number

Use this option when you want to use the pass magswipe exclusively for discounts. Make sure that the employee pass has the following field in the layout. This field encodes the pass number into the first track of the magswipe:

```
"~1%EP"+alltrim(str(gst_pass.pass_no))+ "?"
```

- The ~1 specifies track 1
- The %E triggers the action of a discount with a swipe
- The P is the Access Control prefix used for pass numbers
- The alltrim(str(gst_pass.pass_no)) is the pass number field
- The ? signals the end of the field

In order for operators to apply discounts with a swipe, they simply add all of the items to the sale and swipe the card. All appropriate discounts are applied.

Option #2: Only encode the pass number

Use this option in order to encode just the pass number. In this situation the pass number swipe may be used for many different programs and the %E prefix might prevent using the pass swipe for more than one type of validation program. Track 2 may also be used in this scenario as track 2 can only be encoded with numbers. See “common fields on pass layouts” in the *Salesware Layouts* document for a **Sample Track 2** field.

Make sure that the employee pass has the following field in the layout. This field encodes the pass number into the first track of the mag swipe:

```
"~1"+alltrim(str(gst_pass.pass_no))+ "?"
```

- The ~1 specifies track 1
- The P is the Access Control prefix for your pass numbers
- The alltrim(str(gst_pass.pass_no)) is the pass number field

- The ? signals the end of the field

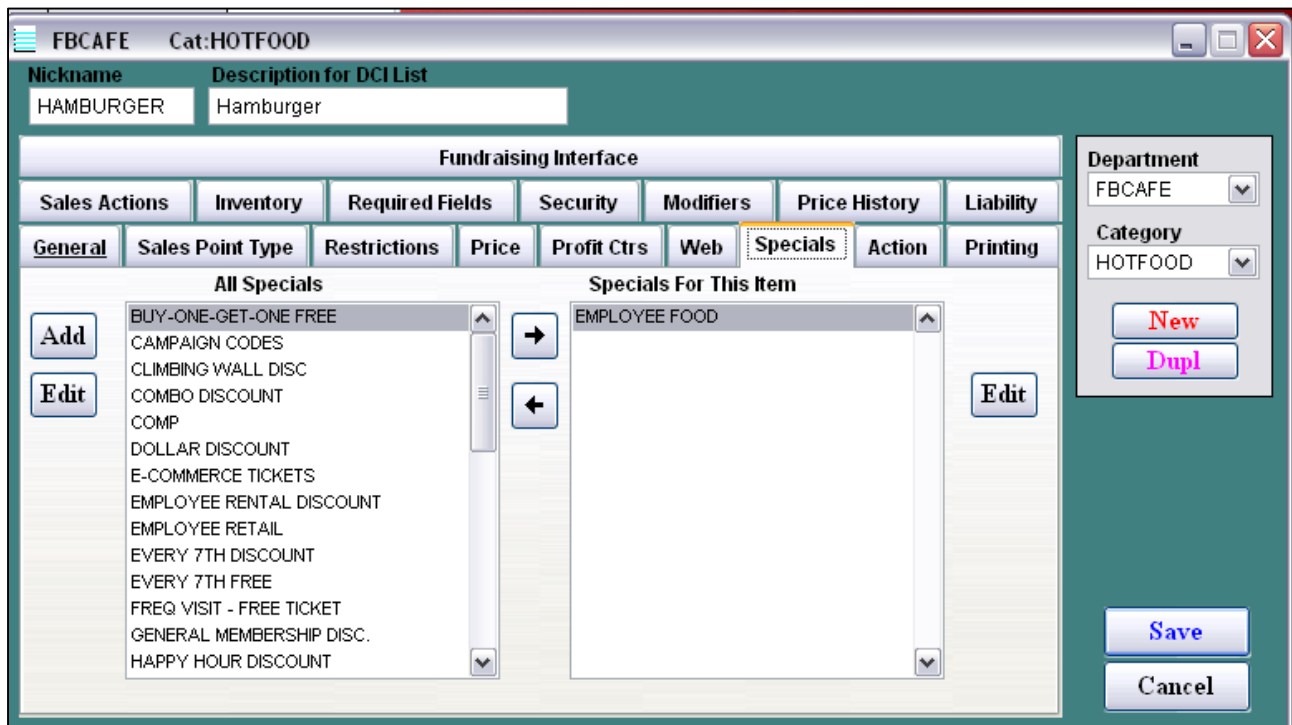
Set up a hot key at salespoints that offer employee discounts. Do this by modifying the Sales32c.INI file at those salespoint (or alternatively modify the global .INI settings in SysManager) in the following manner:

```
[Preferences]
F11Text="%EP"
F11Track=1
F11Prompt="Swipe discount card"
```

You can use F10, F11 or F12. Make sure to specify the correct track that contains the encoded pass number. The F11Prompt setting is the user defined text that gives the operator instructions once they hit **F11**.

Step 4: Link the appropriate specials to your items

Next, link the appropriate specials to your items (only necessary for specials not configured as Global specials).



The screenshot shows a software window titled "RETAIL Cat: TEAMCLOTH". At the top, there are fields for "Nickname" (JERSBASEBL) and "Description for DCI List" (Baseball Jerseys). Below this is a "Fundraising Interface" section with several tabs: Sales Actions, Inventory, Required Fields, Security, Modifiers, Price History, Liability, General, Sales Point Type, Restrictions, Price, Profit Ctrs, Web, **Specials**, Action, and Printing. The "Specials" tab is active, showing two lists: "All Specials" and "Specials For This Item". The "All Specials" list includes items like "BUY-ONE-GET-ONE FREE", "CAMPAIGN CODES", "CLIMBING WALL DISC", "COMBO DISCOUNT", "COMP", "DOLLAR DISCOUNT", "E-COMMERCE TICKETS", "EMPLOYEE FOOD", "EMPLOYEE RENTAL DISCOUNT", "EVERY 7TH DISCOUNT", "EVERY 7TH FREE", "FREQ VISIT - FREE TICKET", "GENERAL MEMBERSHIP DISC.", and "HAPPY HOUR DISCOUNT". The "Specials For This Item" list includes "EMPLOYEE RETAIL" and "MEMBER RETAIL DISCOUNT". There are "Add" and "Edit" buttons for each list, and a double-headed arrow between them. On the right side, there are dropdown menus for "Department" (RETAIL) and "Category" (TEAMCLOTH), along with "New" and "Dupl" buttons. At the bottom right, there are "Save" and "Cancel" buttons.

Step 5: Test! Test! Test!

Test everything! Make sure that the magswipes are encoded correctly (the correct number in the correct track), that the discounts are applied as expected, that voided passes do not work, hot keys work if applicable, etc.

How to... guide for unit value programs

Unit value programs overview

Unit value cards are pass items that are typically used to pre-sell a certain amount of uses (entrances, lift tickets, admissions, etc.) to a guest. These pre-sold uses are often sold at a discounted price as an incentive to pre-purchase a certain number of lift tickets, entrances, admissions, etc.

To redeem these pre-purchased uses, a guest takes the card to a point-of-sale. The operator sells the guest an item and validates the sale of the item with the card. The price of the item adjusts to the "per use" value of the card and the cashier finalizes the sale to a form of payment set up to accommodate the program (the guest has already pre-paid for the item, so no money is collected from the guest).

Pre-selling a certain number of days, entrances, admissions, etc., in this manner allows a client to provide an incentive to the guest to pre-purchases at a discounted rate *and* allows revenue recognition based on the redemption of the card as opposed to recognizing all revenue at the time the pre-purchase card is sold to the guest.

Functional pieces of the program

- Pass item – Unit value cards are pass products that can be sold with a certain number of points for a certain price. A value per point is calculated depending on the final price of the pass product when sold.

Example:

A card with 5 points is sold for \$200. The value per point or **unit value** is set to \$40.

- Redemption items – The unit value card is then used to validate the sale of other items (Items that are configured with required or optional validation.) The price of the item being validated is adjusted to the current “unit value” of the card validating the sale and, typically, a point is deducted. Optional: A special can be configured that is automatically applied to the item at the time of a successful validation, which can be used to record the difference in the pre-validation price vs. the post-validation price of the item.

Example:

A Lift Ticket that costs \$50 is validated with the unit value card above. With a successful validation, the price of the Lift Ticket is altered to \$40 and a special is automatically applied to the Lift Ticket item that reflects the \$10 discount. One point is deducted from the card.

Adding points to an existing unit value card: Points can also be added to a card by using validation products. When points are added to a unit value card, a new unit value is calculated based on value remaining plus the new value (price of the “add points” item) divided by total number of points.

Example:

The unit value card above now has 4 remaining points and a current unit value of \$40. An “add 2-points” product that costs \$50 is sold and validated by the unit value card. The new unit value of the card is: \$35 and it has 6 total points that may be used for redemption.

The new “unit value” is calculated by multiplying the current number of points by the current value (4 points X \$40 = \$160), adding the new value to the existing value (\$50+\$160=\$210), and dividing the total value by the total points (4 existing points plus 2 more points = 6 points; \$210 divided by 6 = \$35).

Program configuration

To set this up there are several steps including the configuration of the pass item that creates the unit value card, the validation products which are redeemed with the unit value card, and the validation products that add additional points to the unit value card.

Pass configuration and sale – the unit value card

1. Configure a product that creates a pass (the **Create Pass** radio button is selected on the **Action** tab).

2. Within the **Action Specifics** button, on the **Starting Values** tab assign a certain amount of points. **Points1** or **Points2** may be used.
3. Make sure to check the **Unit Value** box next to **Points1** or **Points2**. When you check this box, the **Money** field that corresponds to the points becomes disabled. The **Money** field is used to hold the current unit value of the card and thus cannot be modified manually for this product.
4. Uses per day, uses per week, blackout dates, shifts, etc., can be set up just like any other pass product.
5. Optional: A card number may also be assigned to these passes at the time of sale, because both card numbers and pass numbers can be used for validation in unit value programs.

MISCCRDPRG / UNITVALUE / UV5DAYPASS

Item Discounts Remote Validation DebitWare

Starting Values Global Settings Auto Pass Validate Auto Sales Autosale Options

Starting Values For New Passes

Pass Is Valid

7/1/2013 12:00:00 AM Through 12/31/2013 12:00:00 AM

Mon Now BOD EOD Tue Now BOD EOD

Total Uses Discount Level

0 0

	Points	Money	Unit Value
1	5	\$0.00	☒
2	0	\$0.00	☐

☐ Validate parent instead of this

Parent is determined by: ☒ Parent Guest ☐ Master Pass No

☒ Assign number from basket 19 (num_source)

☐ Create a DirectNet account when sold

☐ Create only one Access Record for quantities > 1

Save Cancel

6. Sell the pass. Look up the pass and note that the **Money1** or **Money2** field (depending on the point field selection at configuration) is now populated with the unit value. This was calculated by dividing the sale price of the pass item by the total points configured in **Points1** or **Points2**.

1	Unit Value 5 Day Pass 07/21/2013	200.00
<<	>>	
Modify	Special DateTime Account Message Notes Set Guest	200.00

S Pass Information for 54004001

JANE DOE 1/1/1977 Guest# 13001001

Pass# 54004001
Valid: 7/20/2013 12:00:00 AM through 7/19/2014 11:59:59 PM
Last Use: / /
Total Uses: 0
Points1: 5
Points2: 0
Money1: 40.00
Money2: 0.00

Validation product configuration and sale – redemption items

1. Configure an item that has either forced or optional validation.
2. In the validation template *deduct* the appropriate number of points on the **Validation** tab (typically -1 for a one use product, -2 or a two use product, etc.).
3. On the **Item/Pass Relationship** tab, select the **Unit Value Pass** product and move it from the **Available Passes** window to the **Assigned Passes** window.
4. If a special is automatically applied to the validation product (in order to capture the variance in the regular vs. adjusted unit value price), configure a macro in the discount macro box. The syntax for this macro is SPECIAL ("XXXXXXXXXX") making sure that the special nickname is padded to ten spaces.

Item Dept:PASSES Cat:MISCPASSES

Nickname: UVREDEMP-2 Description for DCI List: Unit Value Redemp. 2 Days

Printing Sales Actions Inventory Required Fields Security Modifiers Price History

General Sales Point Type Restrictions Price Profit Ctrs Web Specials Action

Item Type:

- ☒ Regular Item
- ☐ Create New Guest Record
- ☐ Create Pass Return Time:
- ☐ Begin Rental
- ☐ Begin Private Booking

Validation:

Sale: ☐ None ☐ Force ☒ Optional

Return: ☐ Optional ☐ Force

☐ Allow Validation For A Future Date

Template

✓ PASSES / MISCPASSES / UVREDEMP-2

Validation

Total Uses	0	▲▼
Uses Per Week	0	▲▼
Uses Per Day	0	▲▼
Points 1	-2	▲▼
Points 2	0	▲▼

✓ PASSES / MISCPASSES / UVREDEMP-2

Validation

☐ Restrict validation to only the following pass types

Available passes

- [passes, miscpasses, 1weeklyuse] 1 Day per V
- [passes, miscpasses, 7thdayfree] 7th Day Free
- [passes, miscpasses, days only] Days Only - L
- [passes, miscpasses, employee] Employee Pas
- [passes, miscpasses, fotm] Friend of the Museu
- [passes, miscpasses, mammoth vp] Mammoth v
- [passes, miscpasses, memberdisc] Member Dis
- [passes, miscpasses, mtncreek3x] Mtn.Creek T
- [passes, miscpasses, ptlvdisc] Point Level Disc
- [passes, miscpasses, resortchg] Resort Charge
- [passes, miscpasses, swtmfamily] Snowtime F
- [passes, miscpasses, uvredemp-2] Unit Value f

Item / Pass Relationships

Assigned passes

- [passes, miscpasses, unitvalcd5] Unit Value - \$

Discount macro for assigned item: SPECIAL("UVREDEMP-2")

- Sell one of the validation items and validate that sale with the unit value card created in step #6 in the previous section. Note that the price of the item adjusts to the current “unit value” of the card validating the item, and a special has automatically been applied to the item that reflects the difference in the item’s price (the difference between the price of the item before and after validation).

The following screen capture shows the line item before validation with unit value card:

1	2 Day UVC Ticket	100.00
	Special DateTime Account Message Validate	

The following screen capture shows the line item after validation with unit value card:

1	2 Day UVC Ticket	80.00
	UVREDEEMPTN 20.00 DateTime Account Message Pass Entered	

The unit value pass still has a “unit value” of \$40, but 2 points are deducted from the original 5. The new total value of this card is \$120 (3 points X \$40):

 Pass Information for 117009027
MAILE GORING ()641-1040 01/01/198 Pass# 117009027 Valid: 08/29/2002 11:41:37 through 02/ Last Use: 05/02/2005 10:50:35 Total Uses: 0 Points1: 3 Points2: 0 Money1: 40.00

Validation product configuration and sale – “add points” items

1. Configure an item that has forced validation.
2. In the validation template, add the appropriate number of points on the **Validation** tab. For instance, if the item is designed to add 3 points, the number entered in the validation template for **points1** or **points2** would be a positive 3.
3. On the **Item/Pass Relationships** tab, select the **Unit Value Pass** product and move the pass item from the **Available Passes** to the **Assigned Passes** window. Check the **Restrict validation to only the following pass types** check box if applicable.
4. If a special is automatically applied to the validation product (the “add points” product), configure a macro within the discount macro box. The syntax for this macro is **SPECIAL (“XXXXXXXXXX”)** , making sure that the special nickname is padded to ten spaces.

Note: This special is not used to track discounts applied to the “add points” item (the way it is used in “redemption” items), but may be useful in tracking overall unit value program activity through reports such as the Specials Performance Report.

Item

Dept:PASSES

Cat:MISCPASSES

Nickname

Description for DCI List

UNITVALRF3

3 Point Unit Value Load

Printing

Sales Actions

Inventory

Required Fields

Security

Modifiers

Price History

General

Sales Point Type

Restrictions

Price

Profit Ctrs

Specials

Action

Item Type:

Validation:

☒ Regular Item

☐ Create New Guest Record

☐ Create Pass

☐ Begin Rental

Return Time:

None

Force

Optional

Return:

Optional

Force

Allow Validation For A Future Date

Template

PASSES / MISCPASSES / UNITVALRF3

Validation

Total Uses

0

Uses Per Week

0

Uses Per Day

0

Points 1

3

Points 2

0

✓ PASSES / MISCPASSES / UNITVALRF3

Validation **Item / Pass Relationships**

☒ Restrict validation to only the following pass types

Available passes

[asc-passes, disc cards, disc card] Discount C
 [asc-passes, edge card, edgecard] Edge Card I
 [asc-passes, edge card, edgecardtk] Edge Card
 [asc-passes, metickets, 5metickcrd] 5 Point Me1
 [asc-passes, metickets, metickrdmt] MeTicket R
 [cardactv, cascade, cascdepass] Cascade Pas
 [cardactv, snowtime, snwvtmepass] SnowTime
 [cardactv, timberline, tmbrlnpass] Timberline Pas
 [consignmnt, vouchers, vouch-food] Voucher -
 [consignmnt, vouchers, vouch-lsn] Voucher - L
 [consignmnt, vouchers, vouch-ret] Voucher - R
 [consignmnt, vouchers, vouch-tk] Voucher - Ti

Assigned passes

[passes, miscpasses, unitvalcd5] Unit Value - \$

Discount macro for assigned item: SPECIAL("UVRELOAD ")

5. Sell the “add points” validation item and validate it with the unit value card sold above.

The following screen capture shows the line item before validation:

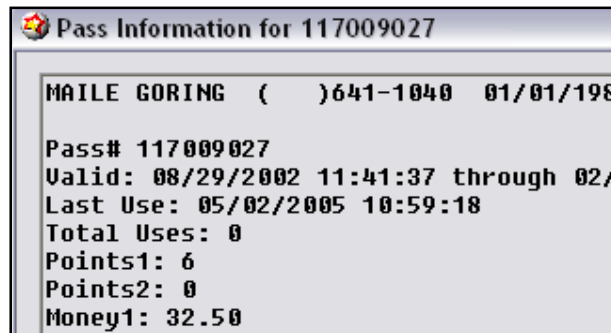
1	3 Additional Points	75.00
Special DateTime Account Message Validate		

The following screen capture shows the line item after validation:

1	3 Additional Points	75.00
UVRELOAD 0.00 DateTime Account Message Pass Entered		

6. Look up the pass record for the unit value card and note that the point value has increased and the **Money** field has been updated to reflect the new “unit value” of the pass:
- 3 existing points multiplied by current unit value of \$40 = \$120

- 3 more points added with a value of \$75
- New value of the card is \$195
- New point total is 6
- $\$195/6 = \$32.50$ for the new 'unit value'



Unit value calculation details:

When a unit value card has points added, the **money1** or **money2** field updates to reflect the new unit value of the card.

Example:

A card has 2 points with a current unit value of \$30 making the total value of the card \$60. An “add points” validation product is sold that adds 5 points and costs \$100. The new point total on the card is 7 and the new unit value (held in the **Money** field) is \$22.8571 (current value of \$60 plus new value of \$100 divided by new point total of 7 equals \$22.8571). Items validated with this card now adjust their price to \$22.8571 (rounded to two decimals).

Notes

- If a guest has more than one unit value card, the validation cascades until enough points are found on one pass record to complete the sale (assuming validation is done with a card number, or if pass numbers are used cascading **Validation with a DCI** is turned on). For instance, a guest has two cards, the first with one point and the second with three points. If the guest purchases a single item that requires two points, the first card is skipped because there are not enough total points and instead the second card is validated. Multiple validations cannot occur across multiple pass records in the same sale (deducting a single point from the first pass record and a single point from the second pass record in this scenario is not an option).
- All sales and validations of unit value products are recorded in the `unitvalu` table.
- The 4.4 version *appropriately* updates the `unitvalu` table when either a card **or** pass number is used for validation.
- A report can be generated that shows remaining points on unit value card for expired passes. **ReportManager > Pass Reports > Remaining Unit Values**.
- At the end of this report the operator is prompted to reset expired pass points to **0**.

Expired Passes with Remaining Unit Values

DEPARTMENTS: MISCCRDPRG THROUGH MISCCRDPRG
CATEGORIES: UNITVALUE THROUGH UNITVALUE
ITEMS: All Items THROUGH YTHUNLMTD

Pass #	Dept	Cat	Item	Guest #	Guest Name	Points1	Money1	Points2	Money2
31004001	MISCCRDPR	UNITVALUE	UV5DAYPAS	7000001	SIMMERSON, ED	7	\$249.97		
32004001	MISCCRDPR	UNITVALUE	UV5DAYPAS	7000001	SIMMERSON, ED	6	\$214.26		
Totals:						13	\$464.23	0	

- If using specials to track both the redemption and loading of unit value cards, run the Special Performance Report to get numbers on overall program activity.

Specials Performance Report

Dates: from 1/1/2012 12:00:00 AM to 7/21/2013 11:59:59 PM

Salespoints: All

Operators: All

Specials: from UVPROGRAM to UVPROGRAM

Special

Department	Category	Item	Quantity	Gross Sales	Discounts	Total
UVPROGRAM - UNIT VALUE PROGRAM						
MISCCRDPRG	UNITVALUE	Unit Value Ticket	2	100.00	24.29	75.71
	Totals for item:	Unit Value Ticket	2	100.00	24.29	75.71
	Totals for category: UNITVALUE		2	100.00	24.29	75.71
	Totals for dept: MISCCRDPRG		2	100.00	24.29	75.71
	Totals for special: UVPROGRAM		2	100.00	24.29	75.71
	Grand Totals:		2	100.00	24.29	75.71

Dynamic Revenue Recognition capability

Revenue can now be allocated at the time a ticket/pass product is scanned. Revenue associated with tickets/passes that are sold for future use can now be placed in a Deferred Revenue profit center and at the time the ticket/pass is scanned/validated through ScanMan or GateKeeper modules the revenue is moved from the Deferred Revenue profit center to the proper non-deferred profit center associated with the Recognize Revenue Rule attached to the ticket/pass product.

The Recognize Revenue Rule is configured in **SysManager > Activities > Item/Sales Lists > Dynamic Pricing Rules**. The rule must be configured as a rule type of **Any** or **Recognize Revenue Rule** to be assigned to a ticket or pass item in the **Global Settings** tab of the item's template. With current functionality the rule must follow the paradigm:

MOVEREVENUE(OLD_PR_CTR, NEW_PR_CTR, 20, 10, D,C,I, Salespoint, Operator)

Where **MOVE_REVENUE** is the function, **OLD_PR_CTR** is the deferred profit center. **NEW_PR_CTR** is the non-deferred profit center. **20** is the percent of the deferred profit center to be moved to the non-deferred. **10** is the flat dollar amount to move from the deferred profit center to the non-deferred profit center. Either percent, flat dollar amount or both can be used in the rule. The value is set to 0 if not used. **D, C, I** is the department, category and item nickname of the item that is attached to the profit center adjustment in the data, salespoint is the optional salespoint that is written to the data(scanner location if not specified), **Operator** is the optional operator (blank if not specified).

When a ticket or pass is scanned that has a Recognize Revenue Rule, SalesEZ application passes off the rule in a **RecognizeRevenue** call to **siriusutil.dll**. The **.dll** makes the call to the data writing the information to a new transact record. The **.dll** then responds to SalesEZ application that the call was made. The new record in transact contains the adjustment to the deferred profit center and the non-deferred profit center sold to the item specified in the DCI setting, salespoint and operator as configured.

ValidatePass and **ValidateCard** call the new **RecognizeRevenue** function in **SiriusUtils.DLL** if the template for a validated pass or card is configured with a Revenue Recognition Rule in the **Global Settings** tab of the validation template.

In **SysManager > Activities > Item/Sales Lists > Dynamic Pricing Rules** there is a new dropdown, **Rule Type**, for specifying the type of rule. The types are:

- **Dynamic Pricing Rule**
- **Points4Sale Rule**
- **Revenue Recognition Rule**
- **Any**

In **SysManager > Item Edit > Actions > Action Specifics > Global Settings** there is a new dropdown, **Revenue Recognition Rule**, for assigning a rule from the Dynamic Pricing Rule list that is assigned a rule type of **Any** or **Revenue Recognition Rule**.

In **SysManager > Item Edit > Pricing > Dynamic Pricing** choosing the **Dynamic Pricing Rule** dropdown displays rules of type **Any** or **Dynamic Pricing Rule**.

In **SysManager > Item Edit > Restrictions** the **Points4Sale Rule** dropdown displays rules of type **Any** or **Points4Sale Rule**.

In **SysManager > Accounts > Account Edit > General** tab the **Dynamic Pricing Rule** dropdown displays any rule of type **Any** or **Dynamic Pricing Rule**.

SiriusUtil.DLL

When **SetPass** is performing a validation and the validation template specifies a Revenue Recognition Rule, SalesEZ application checks that the **SiriusUtil.DLL** file (which is necessary for Revenue Recognition) is available. If it is not, SalesEZ application returns an invalid message, "314 - Configuration error. SiriusUtil.DLL is not available."

If a validation needs to perform Revenue Recognition via the `SiriusUtil.DLL`, it is now performed at the beginning of the validation process instead of at the end. If the Revenue Recognition process reports an error, the user is notified with the message, "Pass is good but Revenue Recognition could not be processed." The message also includes the error message from the DLL. Validation is halted and does not take place.

Revenue Moving rules vs. Consignment programs

```
IF(DCI( , , VOUCHERADT), MOVEREVENUE( *DEFERRED*, ADMISSIONS, 100,  
0, CONSIGNMT, REDEMPTION, REDEEMADT))
```

```
IF(DCI( , , VOUCHERCHD), MOVEREVENUE( *DEFERRED*, ADMISSIONS, 100,  
0, CONSIGNMT, REDEMPTION, REDEEMCHD))
```

```
IF(DCI( , , VOUCHERSNR), MOVEREVENUE( *DEFERRED*, ADMISSIONS, 100,  
0, CONSIGNMT, REDEMPTION, REDEEMS NR))
```

Detailed explanations of the two features:

Revenue Rules exist in order to move money from one profit center to another when a ticket is scanned. If there is no revenue to move, then the rules do not get triggered (for example, comp tickets). The most common use of Revenue Rules is to allocate revenue to a **Deferred** profit center when sold and later when the ticket is used, move it to another profit center.

Example:

5000 1-day tickets are heavily discounted at a trade show, let's say \$5.00 each. The client doesn't want to recognize \$25,000 worth of revenue the day that the tickets were produced in Salesware module because most likely, that happened during their off season. So instead, the client uses revenue moving rules to move 100% of the revenue (\$5 per ticket) from **Deferred** to **Ticket Revenue** when the tickets are scanned.

Consignment Programs involve selling a bunch of tickets or vouchers to an account for bulk distribution to a partner, and then recording the redemption of those bulk vouchers back to the same account once they are used. The client may price the vouchers at \$0 and the redemptions at the consignment rate or the vouchers at the consignment rate and the redemptions at \$0 or they may put a price on both items and just 'ignore' one profit center in order to not double-count revenue. Where/when to recognize the revenue in a consignment program is a tricky decision and is the responsibility of the client's accounting department.

Because Revenue Rules and Consignment both have a two-part process, the initial sale and the redemption and they both deal with revenue, it is easy to start thinking that Revenue Moving and Consignment can be used in conjunction to deal with the consignment issue of selling vouchers that cost \$\$ and recording redemptions that also cost \$\$, without doubling up revenue. Unfortunately, this is not true.

Revenue Rules only move money from one profit center to another using a DCI specified in the rule to record the move. Revenue Rules do not interact with consignment programs to perform auto-sales to accounts and cannot set the price of the auto-sold ticket. So, as tempting as it is to want to use revenue moving and consignment together, it

just doesn't work that way. In the future it may be possible to create an enhancement to make the two features more compatible with each other, but for now you must decide on using one or the other.

To enable the two features to work together, please see the following instructions.

- 1. Set up your Consignment vouchers to cost \$\$ and associate the Revenue Moving Rule with the voucher access template (example rule is attached for reference).

This screenshot shows the 'Fundraising Interface' for an item named 'VOUCHERADT' (Adult Consignment Voucher). The interface includes tabs for 'Sales Actions', 'Inventory', 'Required Fields', 'Security', and 'Mod'. The 'General' tab is selected, showing pricing options. Under 'Direct Pricing', 'Default Only' is selected. Under 'Restrictions', '1 Price All Week' is selected. Under 'Price', 'Flat Rate' is selected. A 'Default' price of '20.00' is shown.

This screenshot shows the 'Fundraising Interface' for the same item, 'VOUCHERADT'. The 'Profit Center Split' section is visible, showing the '% Method' selected. The value '*DEFERRED*' is entered in the dropdown, and '100.000' is entered in the adjacent field.

CONSIGNMT / VOUCHERS / VOUCHERADT

Item Discounts		Remote Validation	
Starting Values	Global Settings	Auto Pass Validate	Auto Sales
Autosale Options			

Global Setting For All Access Products

Uses Per Day: Uses Per Week:

☒ Monday ☒ Friday
☒ Tuesday ☒ Saturday
☒ Wednesday ☒ Sunday
☒ Thursday

Times:

☐ Enforce time part of start/end date

Black Out Dates:

Layout:

Prefer:

Revenue Recognition Rule: REV MOVE WITH CONSIGNMENT

☐ Create check point log entry when validating

Sales Screen action to execute when this item is validated:

2. Make your redemption items cost \$0.

Item Dept: CONSIGNMT Cat: REDEMPTION

Nickname: REDEEMADT Description for DCI List: Redemption - Adult

Fundraising Interface

Sales Actions	Inventory	Required Fields	Security	Modifiers
General	Sales Point Type	Restrictions	Price	Profit Ctrs
☐ Direct Pricing ☒ Default Only ☐ 1 ☐ 2 ☐ 3 ☐ 4	☒ 1 Price All Week ☐ WeekDay/Weekend ☐ 7 Prices (Mon-Sun) ☐ Dynamic Pricing	☒ Flat Rate ☐ Calculate ☐ Add Tax	☐ No Tax 1 ☒ 6.5000% ☐ 0.0000% ☐ 0.0000	
Default:	0.00	0.00		

3. Set up the normal consignment account that includes an auto-scan invoice.

Account

Nickname: G-CONSIGNB Full Name: Consignment Account B

General Info Notes History Invoices Statements User Def Security Web

Invoice#	Description	Created	Balance
36004002	ISSUED VOUCHERS/PAYMENTS	11/15/2010 12:50:24 PM	\$72.00
5000002	REDEMPTIONS	11/15/2010 12:50:42 PM	\$0.00

Auto Scan: 5000002 Show Finalized: ☐ New Edit \$72.00

Pay Invoices Apply Fees

4. Sell the vouchers to the appropriate account:

History For Accounts
Detail by Account

Salespoints: All
Operators: All
Accounts: All Invoices: 0 - 999999999999
Transaction dates: 11/15/2010 1:20:49 PM to 11/15/2010 11:59:59 PM

CONSIGNMENT ACCOUNT A Account: G-CONSIGNA Credit Limit: 10,000.00

This report is for audit purposes only. It is not an Invoice

	Adm	Qty	Sales	Transactions	Total
12004001 (Opened:04-11-2010) APRIL 2010 ORDER Arr/Dep: 04-11-2010 to 04-11-2010					
11-15-2010 01:21:17 VOUCHERADT - Adult Consignment Voucher		1	20.00		20.00
11-15-2010 01:21:17 VOUCHERCHD - Child Consignment Voucher		1	13.00		13.00
11-15-2010 01:21:17 VOUCHERSNR - Senior Consignmnt Voucher		1	13.00		13.00
Totals For Invoice 12004001		3	46.00	0.00	46.00
Totals for Consignment Account A			46.00	0.00	46.00

5. Note the profit center for the voucher sales:

SIRIUSWARE, INC.
PROFIT CENTER SPLIT

Sold 11/15/2010 1:20:32 PM to 11/15/2010 11:59:59 PM
 OPERATORS: All
 SALES PTS: All
 PROFIT CENTERS: All
 ACCOUNTS: All
 Admissions are counted once for EVERY profit center an item is split into! Don't Show Un-Split Amounts

Profit Center	Quantity	Net	Admissions
DEFERRED (33)			
CONSIGNMT			
VOUCHERS			
Adult Consignment	1	\$20.00	0
Child Consignment	1	\$13.00	0
Senior Consignment	1	\$13.00	0
Subtotal:	3	\$46.00	0
Subtotal:	3	\$46.00	0
DEFERRED (33) Subtotal:	3	\$46.00	0
TOTALS:	3	\$46.00	0
Discounts Taken:		\$0.00	

When the tickets are scanned to do the auto-sale back to the account (using the %A function in Sales in this example), note that the price of the redemption item is still \$0. It does NOT get set to the “move” amount specified in the Revenue Rule for that particular access number:

\$0.00

Coupon

Special

DateTime

Account

Message

1

<<

>>

Modify

Redemption - Adult
11/15/2010
0.00

Special

DateTime

G-CONSIGNA
3000001

Message

Add Guest?

0.00

Finalize Sale?

OK

Cancel

Note: The revenue is moved according to the rule:

Sold 11/15/2010 1:20:32 PM to 11/15/2010 11:59:59 PM

OPERATORS: All

SALES PTS: All

PROFIT CENTERS: All

ACCOUNTS: All

Admissions are counted once
for EVERY profit center an item is split into!

Don't Show Un-Split Amounts

Profit Center	Quantity	Net	Admissions
DEFERRED (33)			
CONSIGNMT			
REDEMPTION			
Redemption - Adult	1	\$-20.00	1
Subtotal:	1	\$-20.00	1
VOUCHERS			
Adult Consignment	1	\$20.00	0
Child Consignment	1	\$13.00	0
Senior Consignmt	1	\$13.00	0
Subtotal:	3	\$46.00	0
Subtotal:	4	\$26.00	1
DEFERRED (33) Subtotal:	4	\$26.00	1
ADMISSIONS (2)			
CONSIGNMT			
REDEMPTION			
Redemption - Adult	1	\$20.00	1
Subtotal:	1	\$20.00	1
Subtotal:	1	\$20.00	1
ADMISSIONS (2) Subtotal:	1	\$20.00	1
TOTALS:	5	\$46.00	2
Discounts Taken:		\$0.00	

However, the account history always reflects the \$0 redemption amount. You never see the original voucher amount go down and the redemption amount go up on the account itself. You can still use the account to know how many vouchers were originally sold, and then redeemed, but you lose the ability to know how much revenue the redemptions are worth per account. Also, you may have to specify a 0-admission DCI in the Revenue Rule and a 1-admission DCI for the auto-sale (or vice versa) in order to prevent double counting admissions at the time of redemption.

History For Accounts

Detail by Account

This report is for
audit purposes only.
It is not an Invoice

Salespoints: All
Operators: All
Accounts: All Invoices: 0 - 999999999999
Transaction dates: 11/15/2010 1:20:47 PM to 11/15/2010 11:59:59 PM

CONSIGNMENT ACCOUNT A

Account: G-CONSIGNA

Credit Limit: 10,000.00

	Adm	Qty	Sales	Transactions	Total
3000001 (Opened:04.11.2010) REDEEMED APR 20-26, 2010 Arr/Dep: 04.11.2010 to 04.11.2010					
11-15-2010 01:24:02 REDEEMADT - Redemption - Adult	1.00	1	0.00		0.00
Totals For Invoice 3000001	1.00	1	0.00	0.00	0.00

	Adm	Qty	Sales	Transactions	Total
12004001 (Opened:04.11.2010) APRIL 2010 ORDER Arr/Dep: 04.11.2010 to 04.11.2010					
11-15-2010 01:21:17 VOUCHERADT - Adult Consignment Voucher		1	20.00		20.00
11-15-2010 01:21:17 VOUCHERCHD - Child Consignment Voucher		1	13.00		13.00
11-15-2010 01:21:17 VOUCHERSNR - Senior Consignmnt Voucher		1	13.00		13.00
Totals For Invoice 12004001		3	46.00	0.00	46.00

Totals for Consignment Account A			46.00	0.00	46.00
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Appendix A: %F and RFND – Automated refunds

This functionality allows a ticket to be refunded:

- Fully if the guest returns within forty-five minutes from the time of purchase
- Partially if the guest returns within four hours (but after forty-five minutes) of purchase

This functionality can be set up with a barcode using %F referring to RFND conditions in item configurations (**SysManager > DCIs > New/Edit > Sales Actions** tab > **Refund conditions for scanned items:** field). The %F has the time the ticket was sold in minutes since midnight, followed by programmable keyboard codes for items you want to use based on the swipe. The format for %F is:

`%F(sale_time, keycode1, keycode2, keycode3, ...,keycodeN)`

For the format for RFND, see the *Salesware User and Ticketing Guide for Beginning Users*.

Example:

You could configure:

- Adult All Day Ticket: RFND(0, 240, -1) with a programmable keyboard code of 41
- Adult Half Day Ticket: RFND(45, 240, 1) with a programmable keyboard code of 97

If you wanted to set up a swipe to give a full refund if the guest comes back within forty-five minutes and give him a half-day refund if they come back within four hours, you do this:

`%F(480,41,97)`

This assumes that he bought the ticket at 8:00 AM. When you enter `%F(480,41,97)`, the command executes the RFND commands for programmable keyboard code 41 and 97.

Let's say that a person came back at 8:30 AM (510 minutes after midnight):

- For `RFND(0,240,-1)`, a quantity of -1 of the item would be sold (because $510 - 480 = 30$ and 30 is between 0 and 240)
- For `RFND(45,240,1)`, no action would be taken (because $510 - 480 = 30$ and 30 is not between 45 and 240)
- End result = Full refund

Now say that the person came back at 10:00 AM (600 minutes after midnight):

- For `RFND(0,240,-1)`, a quantity of -1 of the item would be sold (because $600 - 480 = 120$ and 120 is between 0 and 240)
- For `RFND(45,240,1)`, a quantity of 1 of the item would be sold (because $600 - 480 = 120$ and 120 is between 45 and 240)
- End result = Refund of All Day ticket and sale of Half Day ticket

Now say that the person came back at 3:00 PM (900 minutes after midnight):

- For `RFND(0,240,-1)`, no action would be taken (because $900 - 480 = 420$ and 420 is not between 0 and 240)
- For `RFND(45,240,1)`, no action would be taken (because $900 - 480 = 420$ and 420 is not between 0 and 240)
- End result = No refund

How to configure items to use this functionality:

1. Set up the All Day ticket, which:
 - Is a regular item (no need to write access record)
 - Has a price (e.g., \$20)
 - **Sales Actions** tab contains the following return condition: `RFND(0,240,-1)`
 - Has a keyboard code assigned to (e.g., 48)
 - Uses a layout containing the following barcode:

```
<|'  
%F('+alltrim(str(val(substr(tmp_time,1,2))*60+val(substr(tmp_time,4,2)),4,0))+',<keyco  
de1>,<keycode2>) '|>
```

In this specific example, the barcode is:

```
<|'  
%F('+alltrim(str(val(substr(tmp_time,1,2))*60+val(substr(tmp_time,4,2)),4,0))+',48,50)  
'|>
```

2. Set up the Half Day ticket:

- Is a regular item (no need to write access record)
- Has a price (e.g., \$10)
- **Sales Actions** tab contains the following Return condition: RFND(45,240,1)
- Has a keyboard code assigned to (e.g., 50)
- Uses a layout containing the following barcode:

```
<|'  
%F('+alltrim(str(val(substr(tmp_time,1,2))*60+val(substr(tmp_time,4,2)),4,0))+',<keyco  
de1>,<keycode2>) '|>
```

In this specific example, the barcode is:

```
<|'  
%F('+alltrim(str(val(substr(tmp_time,1,2))*60+val(substr(tmp_time,4,2)),4,0))+',48,50)  
'|>
```

How the refund take place:

1. In Sales, when you sell the All Day ticket (keycode 48), depending on the time of purchase the barcode prints out the exact number of minutes from midnight until the time of purchase.

Example:

If the guest buys the above configured All Day ticket at exactly 8:00 PM, the barcode prints:

```
%F(480,48,50)
```

2. If the guest comes back (due to bad weather, for example) to return the ticket, the operator swipes the above barcode:
 - If it is within forty-five minutes from the time of purchase (i.e., between 8:00 AM and 8:45 AM for this example), the All Day ticket item is added to the Sales screen with a negative quantity, as set in the item return condition.
 - In this example, it is -1 = Refund = -\$20
 - If it is later than forty-five minutes but within four hours (i.e., between 8:46 AM and 12:00 PM for this example), the All Day ticket item is added to the Sales screen with a negative quantity together with a Half Day ticket with a positive quantity.
 - In this example, it is:
 - -1 for All Day ticket (keycode 48) = -\$20

- +1 for Half Day ticket (keycode 50) = \$10
- = Refund = -\$10
- If it is later than four hours (i.e., after 12:00 PM), no sales action takes place upon swiping = No refund.

Notes:

- You can tack as many things on there as you like.

Example:

%F(480,24,41,97,102,56) would invoke programmable keyboard codes 24, 41, 97, 102 and 56 with a sale time of 8:00 AM and based on their respective RFND commands.

- You can change the return conditions as you wish, such as sixty minutes for full refund (instead of forty-five), and different levels of partial refunds of three hours, four hours, six hours, etc., (no need to stick with four hours at half price).
- The following is a sample of this kind of ticket:

```
<|alltrim("<RR><F3><HW4,4><RC50,810><EI>")+upper(substr(CMONTH(ctod(tmp_edate)),1,1))+substr
(tmp_edate,4,2)+'<DI>'>
<|alltrim("<RL><F2><HW3,2><RC500,518>")+alltrim(time())>
<|alltrim("<HW2,2><RC500,560>")+alltrim(tmp_date)>
<|alltrim("<RL><HW1,1><RC480,475>GST#R100552652")>
<|alltrim("<RR><F1><HW2,2><RC50,560>")+alltrim(tmp_oper)+alltrim(tmp_loc)>
<|alltrim("<F3><HW1,2><RC50,850><BS15,30>")+alltrim(tmp_idesc)>
<|alltrim("<RC530,230><OP6><BI><X2>")+'^'+'%F(' +alltrim(str(val(substr(tmp_time,1,2))*60+val
(substr(tmp_time,4,2)),4,0))+',48,50)'+'^'>
<|alltrim("<RL><F3><RC500,265><HW4,4><EI>")+upper(substr(CMONTH(ctod(tmp_edate)),1,1))+subst
r(tmp_edate,4,2)+'<DI>'>
<|alltrim("<F2><RC490,405><HW2,1>")+alltrim("The Colors of Blue are Changing")>
<|alltrim("<F3><HW1,2><RC500,225><BS15,30>")+alltrim(tmp_idesc)>
<|alltrim(" <RL><F3><HW1,1><RC490,490>TOTAL: ")+'
<F2><RC350,505><HW2,1>'+fop()+'<F3><HW1,1><RC190,500>'+str(tmp_ext/tmp_qty,7,2)>
<|alltrim(" <HW1,1><RL><RC290,470> GST: ") +str((tmp_ext/tmp_qty)-
(tmp_ext/tmp_qty/1.07),7,2)>
<|alltrim(" <RC390,435>SUB TOTAL: ") +str(tmp_ext/tmp_qty/1.07,7,2)>
<|alltrim("<RC60,655><OL4><BI><X2>")+'^'+'%F(' +alltrim(str(val(substr(tmp_time,1,2))*60+val(
substr(tmp_time,4,2)),4,0))+',48,50)'+'^'>
<|alltrim("<NR><RC40,670><LT6><BX550,190>")>
<|alltrim("<RC40,220><LT6><BX475,185>")>
<|alltrim("<RL><HW2,2><RC600,585><F1>-----Fold-----Here-----
<RR><F2><RC50,565>")>
<|alltrim("<p>")>
```