tessitura
NETWORK

Booking Protect Integration User Guide

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Tessitura Integration Documentation

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Overview

The Booking Protect Integration provides the ability for Tessitura to retrieve quotes and sell ticket protection for both single ticket performances and packages via the provider API. Logging of quotes and sales are recording within a Local System Table to allow for reconciliation between Tessitura and Booking Protect records.

Prerequisites

Tessitura Version 14.1.7

If using TNEW, TNEW Version 7.16

Tessitura Application Configuration

The Booking Protect Integration requires that a performance and price type is setup to sell Booking Protect. When this performance and price type is added to an order, a quote is retrieved from the Booking Protect API and the sub line item due amount is updated in the order.

Performance Set Up

See standard documentation for performance, pricing and MOS set up in Tessitura. The following details the unique requirements needed for the integration.

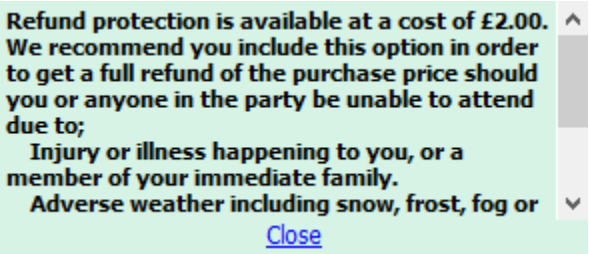
1. Set up a new performance and price type using a General Admission facility. We recommend a new price type be created specifically for the integration. Keep in mind the date/time will display in the application and on standard order confirmations and acknowledgements. Custom order confirmations and acknowledgements can be created to suppress date/time from this performance.
2. The size of the performance facility will depend on the volume anticipated for Booking Protect. We recommend a single performance set up per calendar or fiscal year with the date at the last date of the year.
3. The Booking Protect performance should have two price layers. One of the price layers will be for the premium due to Booking Protect, the second price layer will contain the split amount for your organization, set up through LTR_INSURANCE_PROVIDER_FEE.
4. Add the price type to the performance as a zero value. Make the price editable for all pricing layers.
5. We recommend you add a Sales Note to this performance with the language you want your front end users to use when asking if your patrons would like to purchase Booking Protect. You have the option to make this note required, or not. Refer to our standard online documentation listed below for more about Sales Note functionality.
    a. Performance Set Up: Sales Note
    b. Sales Note in Order Processing

Pricing Layer Set Up

Booking Protect API returns the quoted amount for the ticket protection in on lump dollar amount. The integration allows this amount to be divided into two separate pricing layers to reflect the revenue share your organization can negotiate with Booking Protect. This is done by creating two separate price layers which can be attached to different GLs for easier financial reporting. The negotiated revenue share amount can be set using the system table LTR_INSURANCE_PROVIDER_FEE.

Messaging Rules Configuration

This integration uses the pricing rules engine to call and display a pre-populated message rule during the order processing workflow. Booking Protect API creates the content in the message box and is not editable.



The configuration for the display time of this message is a global setting and will impact your pricing rules and alerts messages for the entire organization.

The T_DEFAULTS: NOTIFICATION_DISPLAY_SECONDS field sets the number of seconds for the popup. Please see standard linked documentation for more about the functionality and values used for this field.

Security Configuration

Any user group that can process an order in Tessitura must be given rights via Tessitura Security Application to the integration as well, regardless of whether they will be utilizing the integration. The Services screen of the Security application is used to assign security access for service resources, which are used when accessing Tessitura through the updated REST API. Security rights are segmented into Add, Delete, Edit, and View rights.

A user group's ability to access the integration is controlled by the following Security Services Resources:

Resource Name	Description
Custom	Add, Delete, Edit & View rights
ReferenceData/SystemDefaults	Add, Delete, Edit & View rights
Security/ContextInformation	Add, Delete, Edit & View rights
TXN/Performances	Add, Delete, Edit & View rights
CRM/Constituents	Add, Delete, Edit & View rights
TXN/Orders	Add, Delete, Edit & View rights

Live to Test Configuration Updates

The integration Client Access value in T_DEFAULTS must be updated on your test system when a live to test copy down is performed, or when your database values are restored from a different database.

The following value must be updated in the T_DEFAULTS table on your test instance after a live to test copy.

INSURE_ACCESS_ID – Generated by Tessitura and should only be updated in live to test copies to ensure the integration is pointed at the correct instances. The last digit of this id indicates whether it is pointing to Live (L) or Test (T).

TNEW Configuration *(TNEW Install Only)*

TNEW Configuration of Booking Protect

Go to **System Tables>>** **LTR_TNEWCUSTOM_WEB_DEFAULTS** **>>** There are two configuration items:

1. **booking_protect_perf_no** – This is the performance number of the dedicated Booking Protect performance that represents the insurance line item

2. **booking_protect_price_type** – This is the price type id from **Ticketing Setup>> Pricing Setup>> Price Types** of the dedicated Booking Protect price type

TNEW Toggle the Customization On or Off

Go to **System Tables>>** **LTR_TNEWCUSTOM_WEB_DEFAULTS** **>>** **booking_protect_is_enabled**, update the *Value* field to either **Y** (to enable) or **N** (to disable).

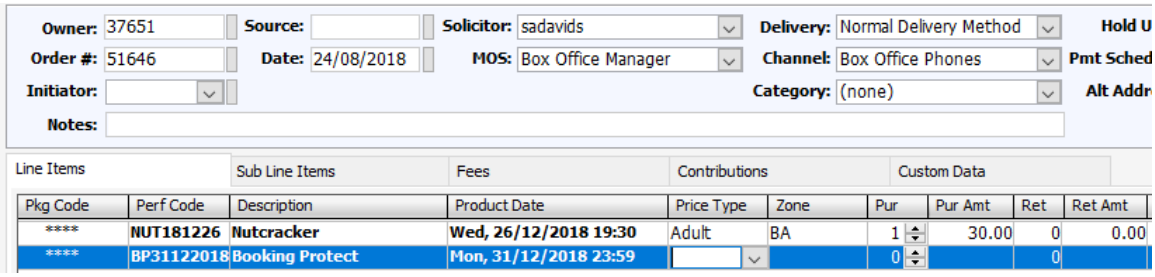
TNEW Edit Custom Page Content

Go to **System Tables>>** **LTR_TNEWCUSTOM_GLOBAL_CONTENT** **>>** the content for this customization has three modules:

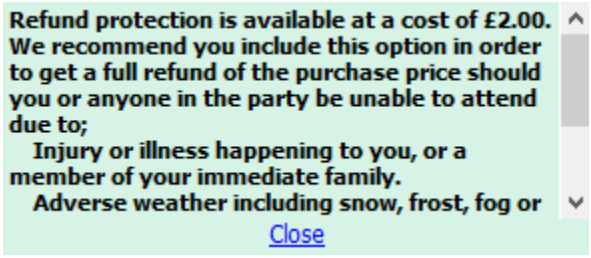
1. **Booking Protect Offer**
2. **Booking Protect Removed**
3. **Booking Protect Error**

User Guide

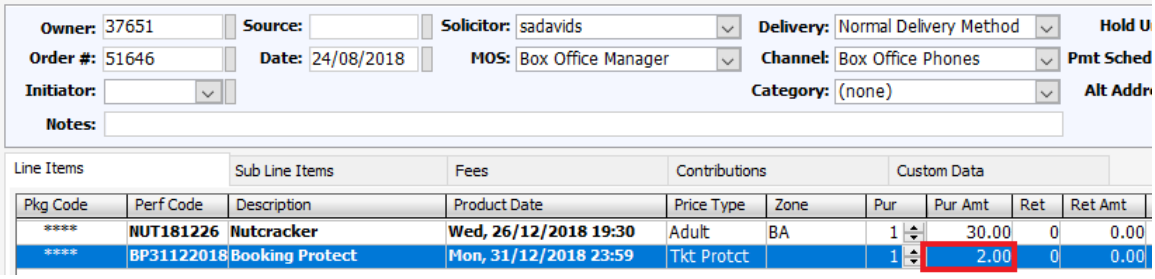
The Booking Protect Integration is used to generate quotes based on the cart contents, and for confirmation of the sale of Booking Protect. The process for retrieving a quote for Booking Protect starts within a Tessitura order. Once a customer has confirmed their order, the Booking Protect performance can be added to the cart (**Note:** The Booking Protect performance should be the last item added to the cart). Only a single seat should be selected from the Booking Protect performance. It may be helpful to assign the Booking Protect performance to the "Hotlist" for easy access.



Once the seat has been added to the cart and the pricing rule has fired, the cart contents will be sent to the Booking Protect API for a quote. Once this has been retrieved a messaging pricing rule will display showing the terms and conditions along with the premium to be quoted to the customer.



The Booking Protect performance line item will also be updated to reflect the premium.



An entry will also be created within the system table LT_INSURANCE_PROVIDER_LOG. This records the unique identifiers for the quote, the premium and an XML representation of the cart contents that were submitted to Booking Protect.

At this point the customer can choose to continue with Booking Protect or decline the protection. If the customer does decline the protection then the Booking Protect line item should be deleted from the order.

If the customer confirms they would like Booking Protect at the stated premium the order can be closed. As long as the Booking Protect performance is within the basket when the order is saved, a confirmation will be sent to the Booking Protect API. In the event of an error, a message will be displayed to the operator who should check with insurance partner as to the status of the quote.

Note: Booking Protect will only be sent as sold for a *fully* paid order – if the order is not paid or partially paid, the Booking Protect remains in quote status.

Once Booking Protect has been sold on an order, it is recommended that any further amendments to be performed within a brand new order. In the event the customer needs to use the protection, the tickets can be returned within a new order.

System Tables

T_DEFAULTS

T_DEFAULTS - **INSURE_ACCESS_ID, INSURE_VENDOR_ID, INSURE_VENDOR_PASSWORD, INSURE_BASE_URL**
The Tessitura installer should populate these values and this should not be changed without instruction from Tessitura.

INSURE_ENABLED - Set to Y for the integration to function.

INSURE_FEE_PRICE_LAYER_ID - The price layer type ID of the price layer setup for a Organization's portion of the Booking Protect premium.

INSURE_PREM_PRICE_LAYER_ID- The price layer type ID of the price layer setup for the Booking Protect premium.

INSURE_PRICE_TYPE_ID - The Price Type ID of the Booking Protect Ticket Protection price type.

INSURE_PRODUCT_CATEGORY_ID- The Product Category specified by the refund protection partner. Typically is set to TKT.

INSURE_ACCESS_ID – Generated by Tessitura and should only be updated in live to test copies to ensure the integration is pointed at the correct instances.

INSURE_VENDOR_ID – Generated by Tessitura and should not be changed.

INSURE_VENDOR_PASSWORD – Generated by Tessitura and should not be changed.

INSURE_PERF_NO - The performance Id of the Booking Protect performance setup to sell Ticket Protection.

INSURE_BASE_URL – Url of Integration Gateway api. This should be set to https://integrationapi.tessituranetwork.com/insuranceprovider

LTR_INSURANCE_PROVIDER_FEE

Table **LTR_INSURANCE_PROVIDER_FEE** is used to specify the additional fee an organization charges on top of the Booking Protect premium. Values should replicate the contracted value amount with the refund protection partner, as it is included within the quote returned by their API.

This table allows one of two ways to set up the fee split with Booking Protect, either by percentage of cart/basket total (performances only) or by performance amount, but not both.

Id	Parent Table	Start Amt	End Amt	Fee	Fee Percentage	Inactive	Create Loc	Created By	Create Dt	Last Updated By	Last Update Dt
52	Impresario				45.00	☐	HKRAFT	hkraft	08/09/2019 01:13:51 PM	hkraft	08/09/2019 04:14:53 PM
48	Impresario	0.01	9999	1		☑	SJIRJIS	sjirjis	08/07/2019 08:23:57 AM	hkraft	08/09/2019 01:13:51 PM
47	Impresario	1	100.9999	0.25		☑	JBALLINGER	jballin2	07/30/2019 03:59:55 PM	hkraft	08/06/2019 10:16:07 PM
24	Impresario	101	499.9999	0.5		☑	JBALLINGER	jballin2	07/29/2019 04:13:46 PM	hkraft	08/06/2019 10:16:35 PM
30	Impresario	500	99999.99	1		☑	JBALLINGER	jballin2	07/30/2019 02:26:22 PM	hkraft	08/06/2019 10:16:35 PM

Organization – The organization value for the entry.

Start Amt – Sub Lineitem lower bracket to which fee will be selected.

End Amt – Sub Lineitem higher bracket to which fee will be selected.

Fee – The organization fee that is added to each order for the Booking Protect quote.

Fee Percentage – The percentage (out of 100) that should be split to the organization pricing layer.

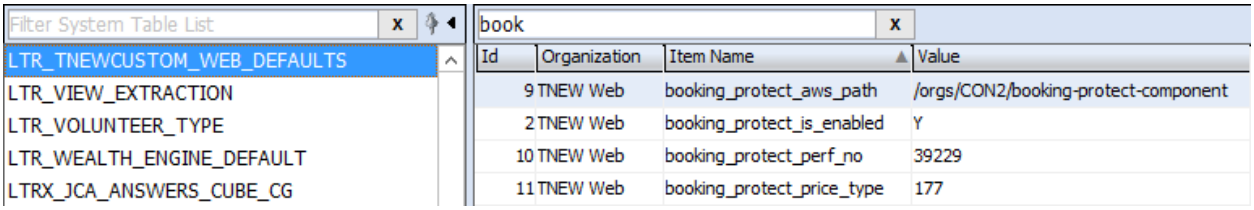
Inactive – Marks a row as inactive. If no rows are active, the full amount of the premium will go to the Premium layer and will not be split out for organization specific revenue.

LT_INSURANCE_PROVIDER_LOG

A row for each quote request is logged in this table. Any error messages from the Refund Protection Partner are logged in this table. When a quote is sold the quote entry is marked as sold. The Refund Protection Log Report uses this table as its data source.

LTR_TNEWCUSTOM_WEB_DEFAULTS *(TNEW INSTALL ONLY)*

Table **LTR_TNEWCUSTOM_WEB_DEFAULTS** is used to specify default settings/controls for customization(s). Use significant caution when editing this table, and be sure not to edit any rows where the description indicates not to.



Organization - The organization value for the entry. Select the organization value used for your site according to Step 2 of the TNEW installation instructions.

Item Name – Description of the setting/control.

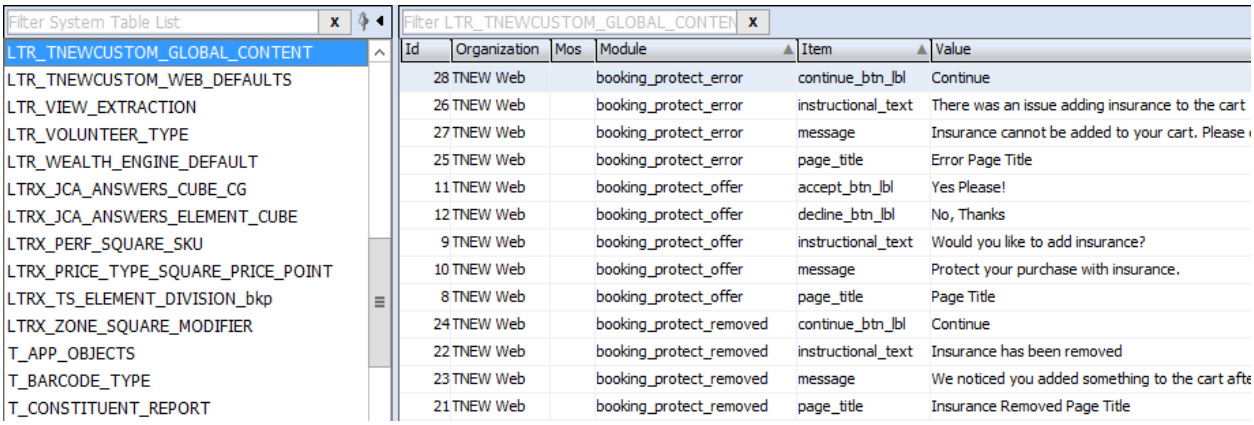
Value - The customization setting. Edit this column to configure customization functions.

Description - Description text for the setting/control.

Inactive - Checking this box marks the row as inactive.

LTR_TNEWCUSTOM_GLOBAL_CONTENT *(TNEW INSTALL ONLY)*

Table **LTR_TNEWCUSTOM_GLOBAL_CONTENT** contains page level content. The modules for this customization are prefixed with **booking_protect**. You may edit the **Value** column. Do not edit the **Item** or **Module** column. The **Button Url** column may be updated only if the intention of the button is to redirect a user away from the customization.



Organization - The organization value for the entry. Select the organization value used for your site according to Step 2 of the TNEW installation instructions.

MOS – MOS that pertains to the content. If left blank (NULL), the content will apply for any Mos.

Module – The customization the content item belongs to.

Item – Description of the content item.

Value - The content item value. Edit this column to configure content. HTML may be used for all items except Button Labels (btn_lbl).

Button Url – The URL value for a button content item.

Inactive - Checking this box marks the row as inactive.

Appendix 1: Quick Start Checklist

The following things must be done in order to use the Booking Protect Integration:

Initial Set Up

Installation:

NOTE: If you used our Hosted Services [RAMP] the installation portion will all be done for you. Self-hosted will be guided through the process with the project team.

- ☐ Whitelisting & Firewall Access
- ☐ Interceptor (Plugin) Installation
- ☐ SQL Script Installation
- ☐ SSRS Report Deploy

Application:

- ☐ GLs created for revenue (recommended)
- ☐ Price Type created for Booking Protect (recommended)
- ☐ Price Layer Configured in System Tables
- ☐ Unique GA Performance created with Booking Protect Price Type & Layers
- ☐ Custom System Table Booking Protect Fee Structure Configured

Security:

- ☐ Price Type: Permissions granted for User Group(s) & MOS(s)
- ☐ User Group Security: Resource security granted for all User Groups allows in Orders Module

TNEW (Optional):

- ☐ TNEW Configuration in System Tables
- ☐ Create Custom Content for TNEW Messaging

On Going Maintenance:

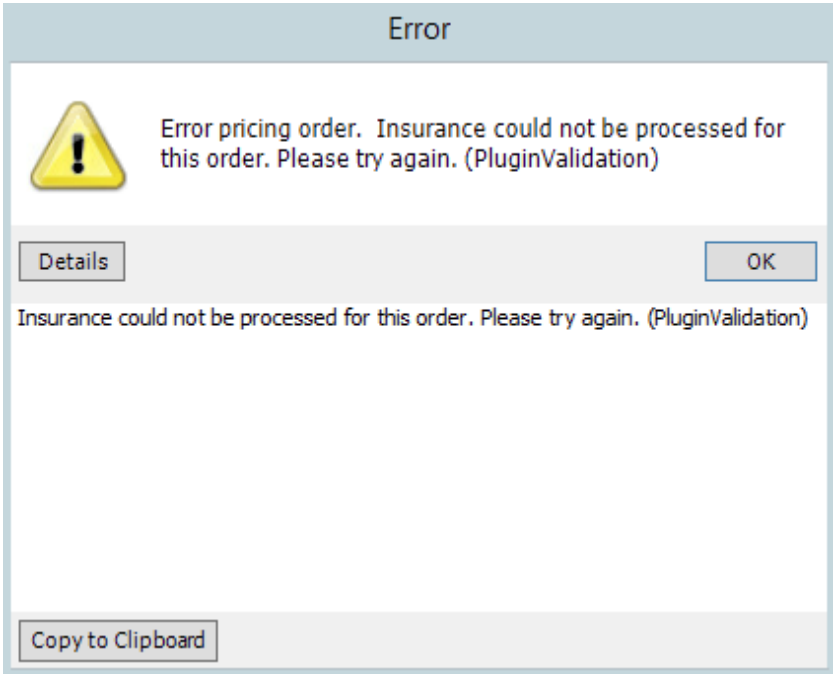
- ☐ New User Groups – Security Permissions
- ☐ New MOS – Booking Protect Performance and Price Type maintenance
- ☐ Rollover of Booking Protect Performance Timed (Monthly/Quarterly/Annual) Based on Volume

Appendix 2: Troubleshooting

Insurance failed to be added to the cart

The customization relies on a properly configured performance. The performance needs to be able to be sold within the Tessitura application and under the web user group and web MOS that TNEW is using, if that portion of the integration is installed. If the performance cannot be seated in the application, it will fail in TNEW.

A user got an 'PluginValidation' error when on an order without the Ticket Protection performance.



All users who process orders must be given the rights to use the integration in security regardless if they will be selling Booking Protect. The integration fires on every order to see if there is a qualifying event in the order to act on. In a consortia environment, that means every user group for every organization must be granted these rights, even if the other organizations are not using Booking Protect. Please see the Security Configuration setting for more information.