

1. What Hot Docs Offers

- a. Films, courses and events
 - i. Films - individual movies at various prices, from free to \$15 depending on the film or member level.
 - ii. Curious Minds courses - a package of six in a course that can be viewed at the patron's leisure
 - iii. Events - live panel discussions, Q and A's or interviews to promote a book, explore a topic, or engage with a celebrity.
- b. Annual Memberships
 - i. A fee-based membership renewed on an annual basis that provides discounts on first-run films and curious minds courses both online and in person, as well as access to our 'free to members' online selection of films and events. Includes select free screenings and events in person as well, depending on the membership level. See details at www.hotdocscinema.ca/c/membership
- c. Monthly Digital Memberships
 - i. A fee-based membership automatically renewed on a monthly basis that provides discounts on online first-run films and curious minds courses as well as access to our 'free to members' online selection of films and events. It does not include any 'in person' benefits.
- d. Doc Soup Subscriptions
 - i. An annual subscription to Doc Soup. This subscription includes 1 monthly curated film from October to April, and 12 Festival Films. It does not include any other membership benefits. Hot Docs Members receive a discount on Doc Soup subscriptions. <https://www.hotdocscinema.ca/c/doc-soup>
- e. Founders Circle
 - i. Hot Docs' donor program. All levels include separate access to all Hot Docs content.
- f. Gift certificates
 - i. How gift purchases are made - an amount of money sent to the recipient as a number code on a .pdf. Recipient then uses code in lieu of credit card payment on the final payment screen.
- g. Donation opportunities

2. The Hot Docs Website

- a. Cinema, Industry, Festival

- i. Cinema - All Hot Docs at Home Material, including all Festivals *except* the Hot Docs Documentary Film Festival
 - ii. Festival - all purchases for the Festival, and descriptions of Festival films are accessed here.
 - iii. Industry - All Industry programs and funds, and information about submissions are accessed through here.
- b. The Purchase Path
 - i. Films, courses and events - See 'How to Purchase a Stream' .pdf
 - 1. Free shows for members when a ticket isn't needed.
 - a. 'Make payment' button changes to 'finalize order'.
 - 2. Promo Codes
 - a. If a promo code field is visible next to a drop down menu, something has gone wrong.
 - ii. Annual Memberships
 - 1. Same as a stream, once the process has started.
 - iii. Monthly Digital Memberships
 - 1. Same as an annual membership. Memberships are renewed a couple days before expiry date.
 - iv. Doc Soup Subscriptions
 - v. Gift certificates
 - 1. E-mailed to buyer, not recipient.
 - vi. Donations
 - 1. Through Agile in the purchase path
 - 2. Through a form that gets sent to development
- c. Accessing Content
 - i. Through the purchase path
 - 1. Watch now link appears after 'finalize order' or 'make payment' link selected.
 - ii. Through 'my shows'
 - iii. Through the film page
 - 1. Does not exist for Curious Minds.
 - iv. Through confirmation e-mail
 - 1. If someone is having trouble finding other methods, re-send their confirmation e-mail - instructions at 6b
 - v. Roku, Apple TV, Android TV and FireStick access path
 - 1. Enter 9 digit voucher code after accessing film on web-based device, and selecting 'watch on roku/apple TV'.
 - 2. If 'landing page', the 9-digit code is in the website:
watch.hotdocs.ca/landing/THISISTHECODE
- d. Creating an Account
 - i. Click text on login page that says "New to Hot Docs? CLICK HERE to sign up"
 - ii. Common errors here are entering birthday information not to format. This field is not mandatory.

- e. My Account from the customer's perspective
 - i. My payment methods
 - 1. Adding and removing credit card numbers
 - ii. My benefits
 - 1. Automatic renewal
 - a. Click the green box that says "Automatic Renewal is Enabled" to cancel a membership. When done successfully, the box will turn red and say "Automatic Renewal is Disabled"
 - iii. My calendar
 - 1. Alternate way to reach 'My Shows'
 - iv. Other customizations
 - 1. Change passwords
 - 2. Change contact information to change e-mails, addresses, phone numbers.

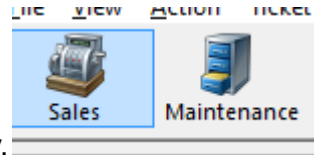
3. Introduction to Agile

- a. Logging in.
 - i. Domain = bhd
- b. Anatomy of a customer
 - i. Contact information
 - 1. E-mail, first name and last name are the only mandatory fields
 - 2. If you are entering information, format is important - if you can't make a change, check the phone number or birthday formats.
 - ii. Membership and benefits
 - 1. If benefits aren't attaching, check dates of membership, and then go into the benefits tab to make sure those match as well. Benefit dates can be changed by right-clicking and selecting properties.
 - 2. Account benefits tab includes fest packages and doc soup packages.
 - 3. Festival passes are memberships
 - iii. Order history
 - 1. Can go right into an order from here. Can look here to see if someone ordered and forgot.
- c. Anatomy of a show
 - i. Event tab > digital streaming OR 2021 Festival OR etc
 - ii. Available = how many tickets left
 - iii. Benefits notice - how many restricted tickets available
 - iv. Note different prices and ticket types. Some require promo codes
- d. Customer vs Member
 - i. Customer numbers are for internal use only - patrons don't need to use them.
 - ii. Searching by customer doesn't bring up member benefits when getting tickets - must search by member for them to apply.

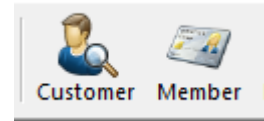
4. Processing an Order

a. Attaching a customer

- i. Make sure you are in sales, not maintenance, by looking at the top pane,



and clicking sales if necessary.



- ii. Select customer or member button in the top pane:
- iii. Search for customer - use view button to get more details and ensure it's the right person. Click 'ok' to attach customer/member

b. Adding tickets

- i. Search for show in the left pane - Select show.
- ii. Enter correct number next to appropriate ticket type.
- iii. Click 'add' to continue adding shows. Click 'proceed' to go to next screen.
- iv. On next screen, make sure order is correct. Double check that tickets delivery methods are set to streaming types.
- v. If you need to change delivery method, select the items checkbox, then click the 'change delivery method' button in the bottom pane, and select



'streaming':

- vi. Click proceed to continue

c. Processing a free order

- i. If no payment is necessary, click 'Finalize'. Click 'Order Confirmation' on the window that pops up, then 'Send Confirmation'. Then 'Close' and 'OK'

d. Processing an order with a payment.




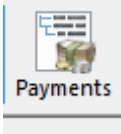


- i. Select the appropriate credit card or gift card type in the 'Choose method' drop down menu. - NOTE: Gift card type is new.
- ii. Fill in the number, date, and security number in the appropriate fields - correcting the cardholder name if necessary. If gift card, you do not need to enter pin.

5. Processing a Membership

- a. Find members in the left pane.
- b. Select appropriate membership type
- c. Proceed as if selling a ticket.
- d. You will be directed to find and add a customer as part of this process.

6. Maintaining an Order

- a. Looking an order up



- i. Search via last name, order number, member number. You can search via customer by clicking the magnifying glass, searching and selecting a customer.
- b. Sending a confirmation e-mail
 - i. Click  in the bottom pane, then 'send confirmation'.
- c. Changing an order's delivery method
 - i. Select the items that need to be changed with checkboxes. Click  in the bottom pane. If switching to streaming, you will need to resend order confirmation as well.
- d. Processing a full refund
 - i. Select the items that are being voided with checkboxes. Click  in the bottom pane. Click payments  in the upper pane. Select the payment. Click  in the bottom pane. Click proceed. Double check that the refund appears. Click finalize. Send a confirmation noting "This is confirmation of the voiding and refunding of your order. The refund will appear on your credit card statement in 3-5 business days."
 - ii. If Festival, delete or expire voucher in Cinesend.
- e. Processing a partial refund
 - i. Select the items that are being voided with checkboxes. Click  in the bottom pane. Click proceed.
 - ii. In the drop down menu, select the appropriate method which includes 'up to (the full payment)
 - iii. Click finalize.
 - iv. Send a confirmation noting "This is confirmation of the voiding and refunding of your order. The refund will appear on your credit card statement in 3-5 business days."
 - v. If festival, delete or expire voucher in cinesend.

7. Promo Codes

- a. In Agile:

- i. Promo codes are applied through a drop down menu next to a ticket type on the order page. You must select a number of ticket types, and a promo code for the code to apply and work.
 - ii. As you type in a code, you will see the remaining codes available. If the code isn't there, it has been used.
- b. Through the website: Answer "Do you have a promo code?" with 'yes'.
 - i. No error message if code is incorrect - promo price just doesn't show up.
- c. Advanced promo codes: Contact Ben for a Zoom if you want to see how they work behind the scenes.

8. Log in issues

- a. Creating a login through agile
 - i. Find someone through customer/member search.
 - ii. Choose the 'web login' tab.
 - iii. Click 
 - iv. Fill in the fields. Password must be at least 8 characters. Username must be unique within the Agile system.
- b. Creating a password when someone has forgotten theirs
 - i. Find someone through customer/member search
 - ii. Choose the 'web login' tab
 - iii. Click 
 - iv. Select change passwords
 - v. Fill in the password fields. Password must be at least 8 characters.
- c. Seeing when someone last logged in
 - i. Find someone through customer/member search.
 - ii. Choose the 'web login' tab.
 - iii. Look at date under 'last logged in'
- d. Logging in as a customer
 - i. Follow the instructions above for creating a weblogin, creating one for yourself, using 'test' plus the persons name. For instance, testisaac
 - ii. Go to hotdocscinema.ca and login. This can be used to check if someone has a payment method attached to their account.
- e. Duplicate logins vs duplicate accounts
 - i. Duplicate logins are okay. This is when there are multiple logins under one account. All of them will work.
 - ii. Duplicate accounts are not okay. Merge accounts, or contact Ben, Britt, Alicks or Dawnalda to merge them.


9. Assigned Seating

- a. Select film - click the button that looks like two seats to go immediately to the seat selection window:

Name	Day	Date
zzz test assigned seating	Sat	Aug 28, 2021 12:00 PM
zzz test assigned seating	Sat	Aug 28, 2021 5:00 PM
Cat Video Fest	Sun	Sep 12, 2021 4:30 PM
Doc Soup: Sabaya	Wed	Oct 20, 2021 7:00 PM

- b. Click to select seat. Click and drag to select multiple seats. Select seat types as usual below the seat map.
- c. Note accessible seats - even when seating becomes more dynamic, they will have a pre-set buffer around them.
- d. Complete order as usual.
- e. To change a tickets seat, click on the seat description, and the seat selection screen will pop up.

10. Advanced Orders

- a. Maintaining an order from someone's history
 - i. Look up customer/member
 - ii. Go to 'sales info' tab.
 - iii. Orders are in bottom tab. Click + to see order details.
 - iv. Click  to go directly to order.
- b. Refreshing an expired link or making an exchange
 - i. Maintain the order.
 - ii. Void the item you are refreshing/exchanging.
 - iii. Find the item you are refreshing or replacing as if you were making an order
 1. NOTE: You will only have access to items the patron would see if they were on the website.
 - iv. Complete the order. If refreshing is done correctly, there will be no price difference. If the exchange requires more funds, this must be done via credit card over the phone. If the exchange causes a refund, the order may be completed as a partial refund.

11. Introduction to CineSend

- a. CineSend minimum requirements
 - i. In Freshdesk resources. Sometimes someone below min requirements can access, but not consistently. If they are below min, nothing we can do.
- b. Using Watch.hotdocs.ca
 - i. How all passholders and founders watch films. If someone is having an access issue - especially a DRM related error message, try getting them to get an app voucher, and access through here.
- c. Multiple IP error, and when it might happen
 - i. For the most part, we usually allow patrons to watch films on different networks. Occasionally we show a film with higher security requirements. Security settings are universal. This error happens when the setting is on - someone has switched wi-fi networks, either by being in a different space, or by using a VPN.

12. The Festival Pass

- a. The Festival Pass portal - this year, it is watch.hotdocs.ca - it can be accessed via any combo of e-mail, pass number, username and password.

13. Casting/AirPlay

- a. ChromeCasting
 - i. Works from android devices and computers. Does not work from apple devices.
- b. AirPlay
 - i. Works from apple device to apple device, and some smart TV's.
 - ii. Sometimes DRM is transferred, sometimes it isn't. If someone mentions there is audio and no video, the Smart TV airplay is for transferring personal content, not licensed content, and will not work.
- c. SmartTVs
 - i. VERY inconsistent. Most likely to work if the smart TV has chromecast or airplay built in.

14. Streaming through Apps with Vouchers

- a. Apple TV
 - i. Download app from Apple TV store (not available in ipad or iphone store)
 - ii. Click 'watch on roku or apple tv' after activating ticket.
 - iii. Enter nine digit code into app.
- b. Roku
 - i. Same as above, but get the app from the Roku Channel store.
- c. FireStick
 - i. Same as above, but can get app from amazon.com or amazon.ca, or within firestick store. Must click button to say "[Search instead for hot docs](#)" and scroll past hot dogs content.

- d. AndroidTV
 - i. Not available yet.

15. Streaming through Apple TV or FireStick with Passes (Unlimited, Volunteers and Founders)

- a. Log in to watch.hotdocs.ca through a browser
- b. Go to settings (gear) and 'watch on TV'
- c. In app, click 'pair device'
- d. Enter code in app on TV into field on watch.hotdocs.ca
- e. Not seeing the right films? Try logging out and logging back in again.

16. Streaming through Roku with Passes

- a. Login with Hot Docs e-mail and password.

17. Other Access Issues

- a. 48 hour expiry
 - i. We can extend for reasonable excuses - make an exchange.
- b. GeoBlocking
 - i. Festival will be Canada-wide - some IP's buy IP addresses from American companies, and they are still listed in databases as American. Once a voucher has been created, Cinesend can be used to un-geoblock that specific voucher. Ask Ben, Dawnalda, Alicks, or Britt.
- c. No Video but sound - probably related to device DRM - there is nothing we can do about it.
- d. Stopping and starting (bandwidth) Nothing we can do about it, but suggest that they turn off any computers or devices on the same network - they may be downloading updates, or using bandwidth unknowingly
- e. Spinning circle - Sometimes related to minimum requirements. Sometimes because Apple made an update, and Cinesend needs to do something to make it compatible. Most frequently, because some sort of antivirus like bitdefender is benign used..

18. Using FreshDesk

19. Introduction to Resources(probably will fold into FreshDesk)

- a. Teams
- b. Marketing Film Tracker
- c. Error Tracker
- d. Shared document
- e. Inbox schedule

20. A deeper look at programming

- a. Member free films

- i. Music on film
 - ii. Live events
- b. Doc Soup subscriptions
 - i. Monthly films
 - ii. 12 festival films
- c. Scotiabank Sponsored programming
 - i. Internal
 - ii. External

21. A Deeper Look at CineSend

- a. Analyzing Sessions
 - i. In Agile, send a confirmation e-mail, but look at the web option instead. You 'll see the 9 digit voucher code in the link.
 - ii. Go to cinesend, and click vouchers, and search for the code.
- b. Creating Vouchers
- c. Checking GeoBlocking
- d. Checking Insertions
- e. Changing individual geoblocking and single user IP
 - i. Search by voucher, and change individual voucher settings

22. When to Escalate:

- a. A film should be available that isn't - the 'get ticket' button is missing.
 - i. Contact Alan or Ben by e-mail if office hours, text Alan, Ben or Britt if off hours.
 - ii. Someone's account needs to be merged (leave an e-mail for Ben)
- b. When an error becomes persistent
 - i. Using the error tracker
 - ii. Who to contact when
 - iii. How to determine if it is Agile or CineSend

23. When people e-mail with non-box office or streaming support enquiries

- a. Questions about tax receipts and donations to Hot Docs - bletourneauduynstee@hotdocs.ca
- b. Questions about donations from Hot Docs to organizations - amacgillivray@hotdocs.ca
- c. Questions about volunteers beyond how volunteer vouchers work - dbrennan@hotdocs.ca or volunteers@hotdocs.ca
- d. Questions about industry materials - industry@hotdocs.ca
- e. Questions about festival submissions - submissions@hotdocs.ca
- f. Questions about rentals and events - rfarag@hotdocs.ca