



CRM 2015
FOOD AND BEVERAGE
USER GUIDE

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ABOUT THIS DOCUMENT

This document has been prepared as a User Guide for Food and Beverage Setup in CRM 2015.

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INTRODUCTION

The Food and Beverage module from Go provides the ability for a system administrator to set up Food and Beverage products which can be sold quickly and efficiently via an appropriate sales Channel. The F&B module now also includes the addition of Tab accounts (Tabs), which allows items purchased to be placed onto a Tab, (usually relating to Food and Beverage items), and the bill to be settled at a later time. This guide also provides information on the management of F&B stock within CRM 2015. An overview of what can be found in this user guide is shown in the table below.

FOOD & BEVERAGE



FOOD AND BEVERAGE

1. F&B INFRASTRUCTURE

Like all Go Modules a certain amount of infrastructure setup is needed.

A number of fields/flags on the Channel and Terminal forms need completing, whilst Booking Operators and Payment Methods also need creating.

This document, whilst not going into detail on the infrastructure, discusses what must be completed for F&B to successfully run.

The GO CRM 2015 Infrastructure Set Up User Guide gives more detailed instructions relating to this.

2. TABS

The Tab option in the Go F&B module allows customers to add goods to a Tab and subsequently settle the amount owing at a later time (such as when they leave the venue / restaurant).

This user guide will give instruction to enable the tab functionality in CRM, before going on to show how they are used on the POS.

3. F&B CATEGORIES & PRODUCTS

All F&B Products created will be placed into Categories. These will categorise the products into distinctive groups, such as Hot Food, Snacks or Drinks.

Categories allow colours to be assigned to them so that within the POS the category of products can be easily found and selected for a quick sale.

F&B Products are created as Stock type Bookable Products, which is also where the sales Channels and Pricing of the product can be entered.

This document briefly discusses what must be done to create a Stock type Bookable Product but more information can be found in the Go CRM 2015 Product Management User Guide.

4. F&B STOCK HANDLING

F&B stock can be handled within CRM 2015 meaning that when a new intake of stock for a particular product is received, this can then be recorded accordingly.

This Stock handling facility, and the subsequent ability to view this, therefore allows an organisation to be aware of what they may need to re-order.

1. F&B INFRASTRUCTURE

For the Food and Beverage module to be set up in CRM 2015 the infrastructure must be in place. The GO CRM 2015 Infrastructure Setup User Guide gives detailed instruction on the areas that are listed in this section. However this section covers the infrastructure, such as [Channels](#), [Terminals](#) and [Booking Operators](#) by describing the fields that relate to the Food and Beverage setup.

1.1. SETTING UP THE F&B CHANNEL

Food and beverage products can be sold through the standard POS Channel alongside other products if required. However, it is often the case that F&B sales will be made through an F&B kiosk, which is more conducive to the quick sale of products that do not require purchaser information to be collected. This requires the Channel to be set up within CRM.

Detailed information regarding the creation of a new Channel in CRM can be found in the GO CRM 2015 Infrastructure User Guide, however the table below describes the fields that should be completed in an F&B Channel form:



Any fields or flags that are not listed or described below do not need to be completed or changed within the Channel form and can be left in their default status, as they do not apply to the Food and Beverage module.

Record Type	Navigation: Venue Management > Channels > New : Complete the following fields:
F&B/Kiosk Channel	<p>General:</p> <ul style="list-style-type: none"> • Name. Enter the name of the Channel. E.g. F&B/ Kiosk Channel. • Description. Enter a description of the Channel. • Anonymous Booking. Select Yes if anonymous bookings are allowed via the Channel. If this option is selected the shopper will not have to enter a name when paying for goods that have the Is Anonymous setting set to Yes. This option should be selected for Channels selling F&B unless you wish to collect customer details. • Display Cashless Tab. Select Yes if the Cashless Card Payment Method can be used with the Channel. • Enable Customer Editing. For F&B channels select No. • Cash Account. Enter a Cash Account if the speed checkout option is to be available via the Channel. Speed checkout allows the user to complete the check out without collecting information from the customer. This will not be required if you set up the Channel and products to allow anonymous bookings.

- **Self Service.** Select **Yes** if the Channel will be used directly by the shopper (rather than through a POS Operator).
- **Floor Limit.** Enter the limit on Cashless spending before authorisation must be obtained.
- **Hide Promo Button.** Select **Yes** to hide the **Promotions** button in EPOS/Kiosk. The Discount and Promotions button will continue to be displayed.
- **Enable Customer Adding.** For F&B channels select No.
- **Display Bookings in Unfulfilled Tab.** Select **Yes** to display the unfulfilled orders tab in the POS.
- **Allow Quick Cancel.** Set to **Yes** for F&B channels.
- **Membership Number Read Only.** Set to **No** for F&B channels.

Payment Defaults:

- **Open Till.** Select **Yes** if you wish the till to be opened automatically when payment is taken.
- **Refund Authorisation Required.** Select **Yes** if the POS Operator will require authorisation to provide a refund to a customer.
- **Print Receipt.** Select **Yes** if you wish to print a receipt automatically. For fast moving Kiosks this option should be set to **No**.
- **Close Booking if Paid.** Select **Yes** if you wish the booking details to be automatically closed once full payment has been taken.

Behaviours:

- **Offer Additional Products.** Select **Yes** if upsell products are to be offered via the channel.
- **Do not create Stock Transactions.** Select **No** if you want to create stock transactions.
- **Return Stock Levels.** If stock levels are to be tracked and displayed for each product on the Channel, select **Yes**.

Cross Sell Products:

- **Cross Sell Products.** Select **Yes** if the system is to allow the offer of cross sell products.

Tabs:

- **Allow Tabs.** Select **Yes** if tabs are allowed via the channel. Tabs are useful in a restaurant or bar environment where customers order a number of items over a period of time, before settling their tab at the end of their stay.
- **Tab Limit.** Enter the upper limit for tabs opened using the Channel.
- **Tab Pincodes.** Enter **Yes** if the user will be required to enter a pin in order to add products to the tab.
- **Stock Products Only.** Select if only stock products can be added to a tab.

Select **Save** and **Close** on the ribbon. The F&B/Kiosk Channel will be completed

1.2. SETTING UP THE TERMINALS

The Terminals represent the physical tills that are going to be used to sell the Food and Beverage products. Multiple terminals may need setting up depending on the amount of tills that are being used. The setup of these is usually completed by a Green 4 Consultant.

The GO CRM 2015 Infrastructure User Guide gives detailed instructions on how a Terminal can be setup, however the table below describes the fields that should be completed when creating a Terminal to sell Food and Beverage items.



Any fields or flags that are not listed or described below do not need to be completed or changed within the Terminal form and can be left in their default status, as they do not apply to the Food and Beverage module.

Record Type	Navigation: Venue Management > Terminals > New : Complete the following fields:
Terminals	<p>General:</p> <ul style="list-style-type: none"> • Name. Enter a name for the Terminal. The name may be used by other users to identify the terminal, for example ShopTill1. • Owner. The owner field will be automatically filled with your CRM user name. • ID. Enter an identification number for the till. The ID will be used by the system to identify the Terminal. • Till Group. Use to group tills for reporting purposes. <p>Default Printer Details:</p> <ul style="list-style-type: none"> • Receipt Printer. If applicable, use the Look Up Records dialog to select the printer the terminal will use to print receipts. Leave blank if the terminal is not attached to a suitable printer. • Till Report Printer. If applicable, use the Look Up Records dialog to select the printer the terminal will use to print till reports. Leave blank if the terminal is not attached to a suitable printer. • Voucher Printer. If applicable, use the Look Up Records dialog to select the printer the terminal will use to print vouchers. Leave blank if the terminal is not attached to a suitable printer. • Member Card Printer. If applicable, use the Look Up Records dialog to select the printer the terminal will use to print vouchers. Leave blank if the terminal is not attached to a suitable printer.

- **Receipt Transform.** If applicable, use the Look Up Records dialog to select the print transform (template) the terminal will use when printing receipts. Leave blank if the terminal is not attached to a suitable printer.
- **Till Report Transform.** If applicable, use the Look Up Records dialog to select the print transform (template) the terminal will use when printing till reports. Leave blank if the terminal is not attached to a suitable ticket printer.
- **Voucher Transform.** If applicable, use the Look Up Records dialog to select the print transform (template) the terminal will use when printing vouchers. Leave blank if the terminal is not attached to a suitable ticket printer.
- **Member Card Transform.** If applicable, use the Look Up Records dialog to select the print transform (template) the terminal will use when printing vouchers. Leave blank if the terminal is not attached to a suitable ticket printer.
- **Disable Full Screen Mode.** The F&B POS and Kiosk can run in full screen mode preventing the user from editing the screen size or closing the application using the Windows buttons in the top right hand corner. If you wish the terminal to run in full screen mode select **False**.
- **Session Timeout (Minutes).** Enter the timeout period for the F&B application. The application will lock if the terminal is inactive for the timeout period entered. For example, if 10 is entered, the application will lock after 10 minutes of inactivity.
- **Is Till.** Select **Yes** when creating a Kiosk/ F&B Terminal. Kiosk terminals are used to sell stock products only, and can use a more graphical display of products.
- **Menu Board Attached.** Select **Yes** if a menu board is attached to the Terminal. The menu board will display offers and products available via the Terminal.
- **Scanned Input Threshold (ms).** Barcode / Wedge scanner configuration setting.
- **Force Offline.** Select **Yes** to force the terminal into offline mode.

	<p>Peripheral Devices:</p> <ul style="list-style-type: none"> • Card Reader Attached. Select Yes if a card reader is attached. • Card Reader Name. Enter the name of the attached card reader. <p>Select Save and Close on the ribbon.</p>
--	--

1.3. SETTING UP BOOKING OPERATORS

Each F&B/ Kiosk POS user must be added to the system as a Booking Operator. Booking Operators differ from CRM users and will be unable to log directly into CRM. Each Booking Operator will have their own Username and Password which will be their login details to the POS

Full details on creating a Booking Operator can be found in the GO CRM 2015 Infrastructure Setup User Guide, the table below also gives information on the fields which must be completed to create a Booking Operator.

Record Type	Navigation: Venue Management> Booking Operators> New: Complete the following fields:
Booking Operators	<p>General:</p> <ul style="list-style-type: none"> • Operator Name. Enter the Booking Operator's Name. • Email. Enter the operators email address. • Operator Group. If applicable, select the Operator Group to which the operator belongs. Operator Groups are used to group users into logical subsets. • Pin Code. Enter a pin for the operator. The operator will use the pin to log into the F&B application. The pin provided must be unique. • Dallas Key Code. If using Dallas Key fobs to log into the POS, enter the Dallas key number. • Allow Discounts. Select Yes if the operator is allowed to apply discounts to a purchase. • Zonal Export. Select Yes if the operator is allowed to carry out Zonal exports. • Allow Refunds. Select Yes if the operator is allowed to make refunds to the customer.

	<ul style="list-style-type: none"> • External ID. If applicable use the Find button to select the user's external Zonal ID. This external ID will link the user's Green 4 Ticketing login details with their Zonal account. <p>Select Save and Close on the ribbon and repeat for each Booking Operator.</p>
--	--

1.4. SETTING UP PAYMENT METHODS

The Payment Method entity is used to define the Payment Methods accepted by the installation of the F&B application. The Payment Methods must be linked to the F&B/Kiosk Channel for them to be used.

For each Payment Method used a new Payment Method form will need completing, however the fields that need completing within the Payment Method will differ depending on the Payment Method that is being completed, such as Cash, Card or Cashless.

The GO CRM Infrastructure Setup User Guide gives instruction and examples on how different types of Payment Methods can be created within CRM 2015. Additionally, it will show how to link the Payment Method to the appropriate Channels. Please refer to this guide when creating a new Payment Method for Food and Beverage. However instructions on creating a [Tab type Payment Method](#) can be found in the next section on Using Tabs.

2. TABS

The Tab option in the Go F&B module allows customers to add goods to a Tab and subsequently settle the amount owing at a later time. For example in a restaurant a customer could add drinks and food to a tab, and then upon leaving they will be able to pay the amount that has been placed onto the Tab.

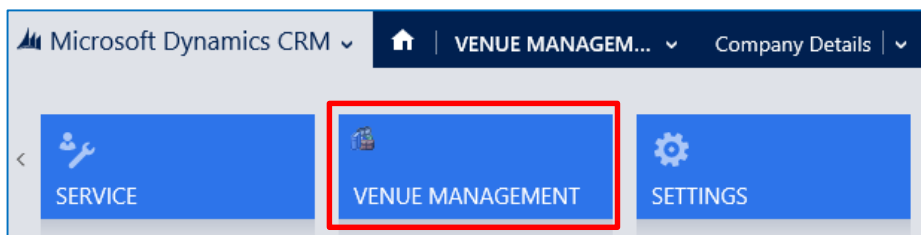
To use Tabs a number of options must be set up within the F&B configuration within CRM 2015. The correct [Channel Settings](#) should be set and a [Tab type Payment Method](#) must be created.

2.1. TAB CHANNEL SETTINGS

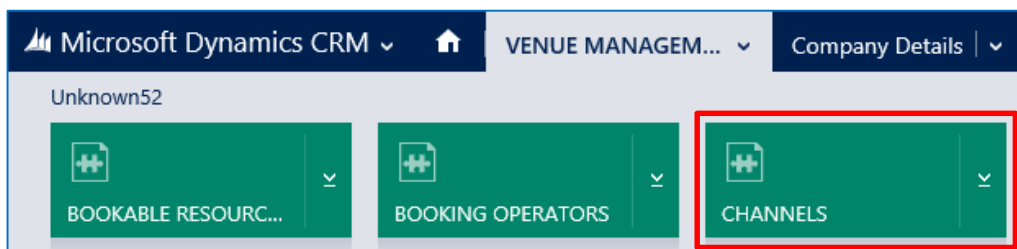
To create a Tab a number of settings are required in the Channel form. Instruction on these settings are listed below:

To navigate to a Channel, complete the following:

- a) Within CRM, select the **Microsoft Dynamics CRM** tab in the navigation bar before scrolling across and choosing **Venue Management** from the drop down.



- b) Next select the **Venue Management** tab in the navigation bar and from the drop down choose **Channels**.



- c) A list of the Active Channels will be displayed. Open up the relevant F&B/Kiosk Channel.
- d) Within the Channel form ensure that the following settings are defined for the Channel using the Tabs:

Tabs			
Allow Tabs	Yes	Tab Limit	£500.00
Tab Pincodes	Yes	Stock Products Only	Yes

- **Allow Tabs.** Select **Yes** to allow Tabs to be used via the channel.
- **Tab Pin codes.** Select **Yes** if the customer is required to set a pin for the Tab. If pins are used, the customer will have to provide the pin each time they wish to add items to their Tab.

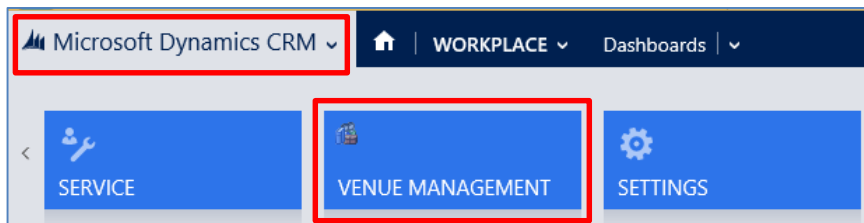
- **Tab Limit.** Enter the maximum amount customers are allowed to put on a Tab before settling their bill.
- **Stock Products Only.** Select **Yes** if a Tab payment can only be used for Stock products (for example Food and Drinks).

e) Select the **Save** icon in the bottom right hand corner of the form.

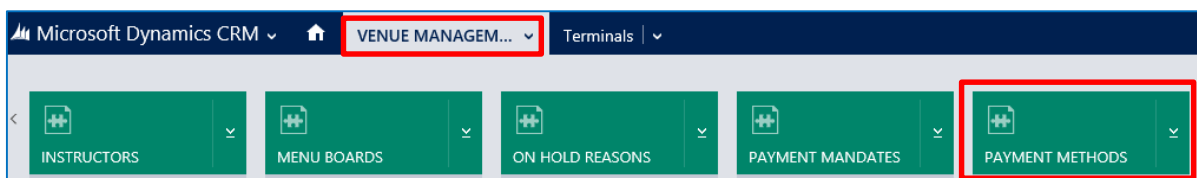
2.2. CREATING A TAB PAYMENT METHOD

A Tab type Payment Method must be created to allow a Booking Operator the ability to add a customer's order to a tab. Although the creation of other types of Payment Methods is shown in the Go CRM 2015 Infrastructure Setup User Guide, the following will provide instruction on creating a Tab type Payment Method.

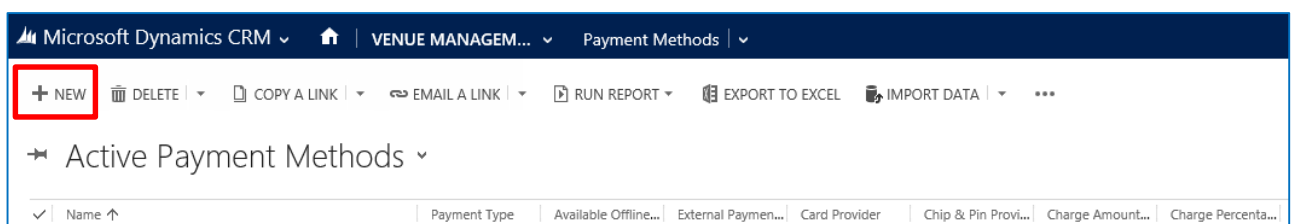
a) Within CRM, select the **Microsoft Dynamics CRM** tab in the navigation bar before scrolling across and choosing **Venue Management** from the drop down.



b) Next select the **Venue Management** tab in the navigation bar and from the drop down choose **Payment Methods**.



c) The Active Payment Methods view will be displayed, select **New** on the ribbon.



d) A New Payment Method form will be displayed. Complete the following for a Tab type Payment Method:



Any fields or flags that are not listed or shown below, do not need to be completed or changed within the Payment Method form and can be left in their default status, as they do not apply to the Tab type Payment Method.

Microsoft Dynamics CRM | VENUE MANAGEM... | Payment Methods | New Payment Meth...

SAVE SAVE & CLOSE + NEW FORM EDITOR

PAYMENT METHOD : INFORMATION

New Payment Method

General

Name *	--	Description	--
Payment Type	--	Available Offline	No
External Payment ID	--	Auto Pay	No
Set amount to bookin	No	Provider Version	--
Sequence Number	--	Redirect	--
Post	--	Collect Account Data	No
Error Redirect	--	Auto Expiry Days	--
Auto Advance Days	--	Update Booking Statu	Yes
Code	--		

Charges

Charge Amount	--	Charge Percentage	--
---------------	----	-------------------	----

Tab Payment

Tab Visibility Global	No
-----------------------	----

Finance Payment

Payment Schedule	--	Requires Mandate	No
------------------	----	------------------	----

Card

General:

- **Name.** Enter a name for the Payment Method, for example Tab. The name will then be displayed to the user in the F&B application when they select the Pay option.
- **Payment Type.** Use the drop-down list to select the type of payment. Select **Tab** from the list provided.
- **Description.** Enter a short description for the Payment Method.
- **Sequence Number.** If applicable, enter the Sequence Number. The sequence number will determine the order in which Payment Methods are displayed in the Kiosk/F&B POS.

Charges:

- **Charge Amount.** If applicable, enter the amount that will be automatically added as a charge when this Payment Method is used.
- **Charge Percentage.** If applicable, enter the percentage that will be automatically added as a charge when this Payment Method is used.
- **Tab Visibility Global.** Ensure **Yes** is selected to ensure Tabs can be viewed and settled across all Terminals using the Payment Method.

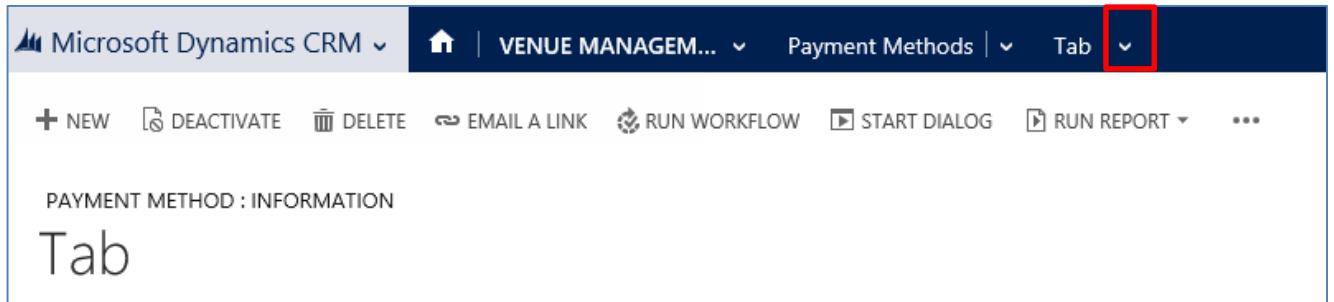
e) Once the details are complete select **Save and Close** in the ribbon.

LINKING THE TAB TYPE PAYMENT METHOD TO THE F&B/KIOSK CHANNEL

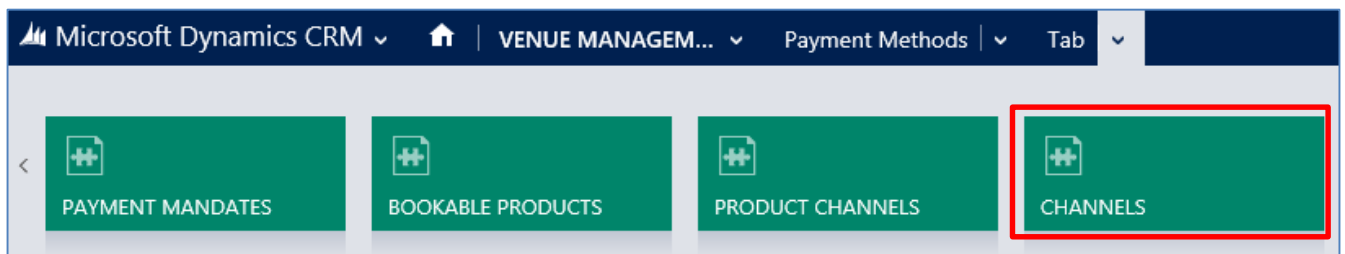
Next it is necessary to define the Channels that will use the Tab type Payment Method. For the Tab type Payment Method to be displayed on the F&B/Kiosk Channel, it must be linked to the relevant Channel.

To achieve this the following must be completed:

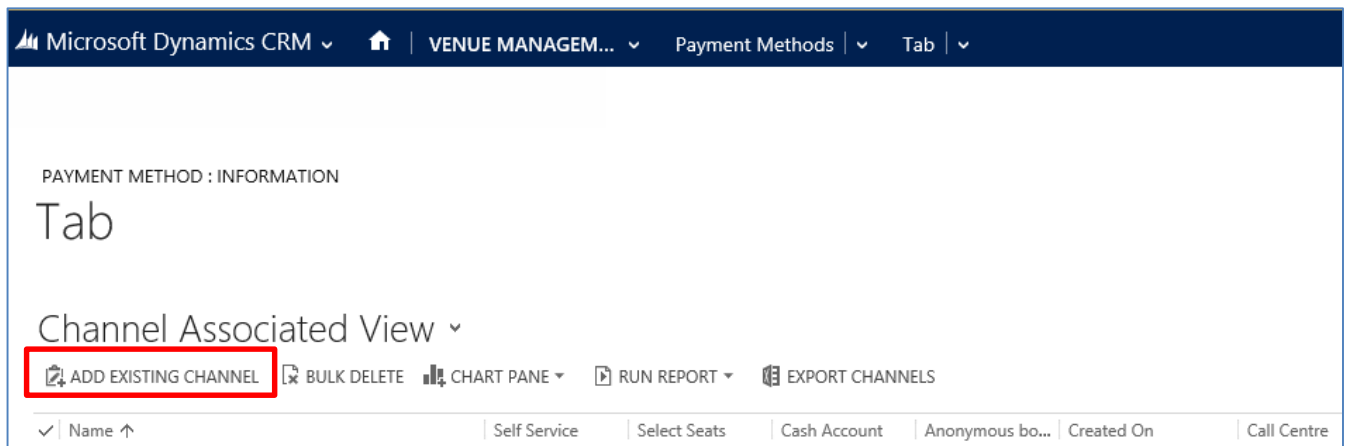
- a) With the Payment Method form open, select the small arrow next to the name of the Payment Method in the navigation bar.



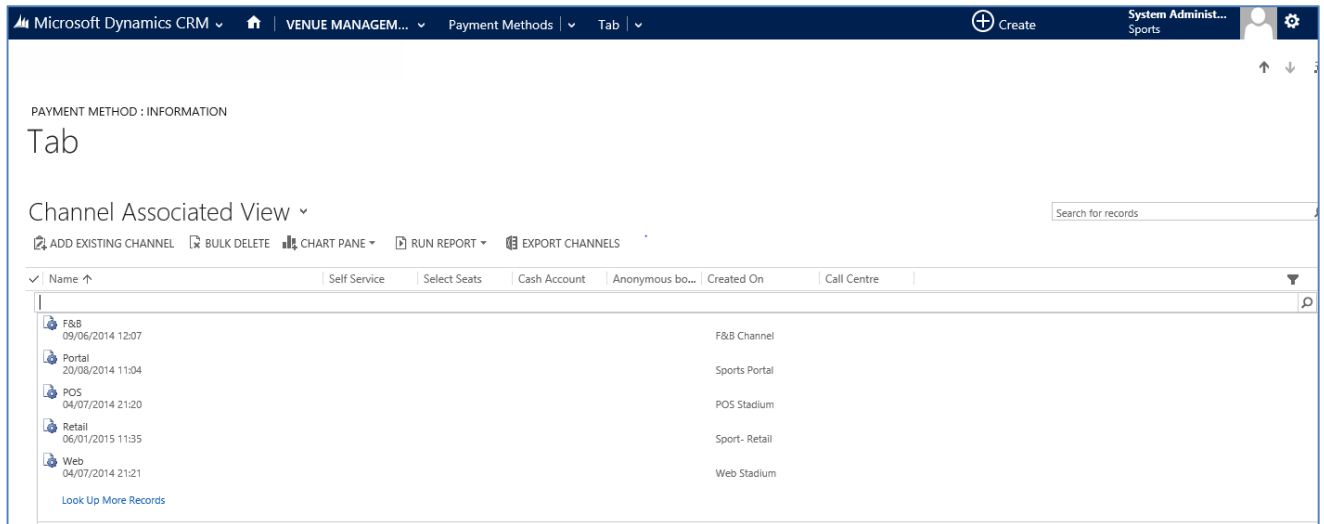
- b) From the drop down, scroll across and select **Channels**.



- c) The Channel Associated View will be displayed, select the **Add Existing Channel** on the ribbon.



- d) Use the search bar to find the relevant Channel or alternatively select the magnifying glass icon to view a list of Channels with the option to Look Up more records.

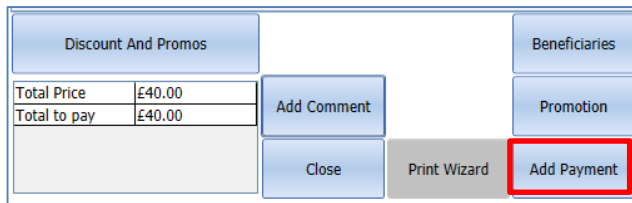


- e) Upon finding the relevant Channel the Payment Method can be used upon, select it. The Channel will then be added to the Payment Method Channel Associated View.

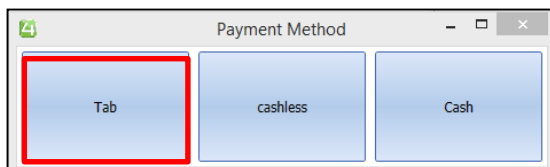
2.3. ADDING ITEMS TO A NEW TAB IN THE POS

To create a new Tab for a customer in the POS when the initial order is placed, do the following:

- a) Add the items to the shopping cart. Once all items have been added to the cart, select **Add Payment**.



- b) From the Payment Method dialog select **Tab**.



Note: Depending upon your configuration of the F&B system you may be asked to provide additional information, for example purchaser's name before the Payment Method dialog is displayed.

- c) If no existing tabs are open, a warning will be displayed. Select **OK** to continue.

d) The Tab screen will be displayed:

The screenshot shows a window titled 'Tab' with the following content:

Booking Total:£	20.00
Promotion Value:£	0.00
Amount Paid:£	0.00
Balance to Pay:£	20.00
Payment Charge:£	0.00
Total for Full Payment:£	20.00

Customer Details:
0

Select Open Tab:

New Tab (highlighted with a red box)

Print Receipt

Pay Exit

e) Select **New Tab** (highlighted above).

f) The **Confirm Tab Payment** screen will be displayed:

The screenshot shows a dialog box titled 'Confirm Tab Payment' with the following content:

Please enter details for the new tab.

Tab Name:

OK Cancel

g) Enter a **name** for the Tab, for example table number or customer name, before selecting **OK**.



If your [F&B/Kiosk Channel](#) has been set up to use Pin Codes with Tabs, when you create a new Tab you will be requested to enter the following additional details:

- **Tab Pin.** Enter the pin number to be used for the Tab.
- **Confirm Pin.** Re-enter the pin number.

The details of the pin should be given to the customer, who will need to give you the pin number each time they attempt to add goods to their Tab.

h) The Tab dialog will be redisplayed. Select **Exit** to continue.

2.4. ADDING ITEMS TO AN EXISTING TAB IN THE POS

- a) Add the items to the shopping cart as normal. When all items have been added to the cart, select **Add Payment**.
- b) From the Payment Method dialog select **Tab**.



Alternatively the Pay to Tab option below the shopping cart can be used to open the Tab window directly.

- c) The Tab screen will be displayed:

Booking Total:£	20.00
Promotion Value:£	0.00
Amount Paid:£	0.00
Balance to Pay:£	20.00
Payment Charge:£	0.00
Total for Full Payment:£	20.00

Customer Details:
0

Select Open Tab:
table1 (£20.00)

New Tab

Print Receipt

Pay Exit

- d) The details of any existing tabs will be listed (highlighted above).
- e) Select the tab you wish to add the current order to.
- f) The Confirm Tab payment dialog will be displayed. Select **OK** to continue.

Confirm Tab Payment

Confirm payment to Tab: table1

OK Cancel



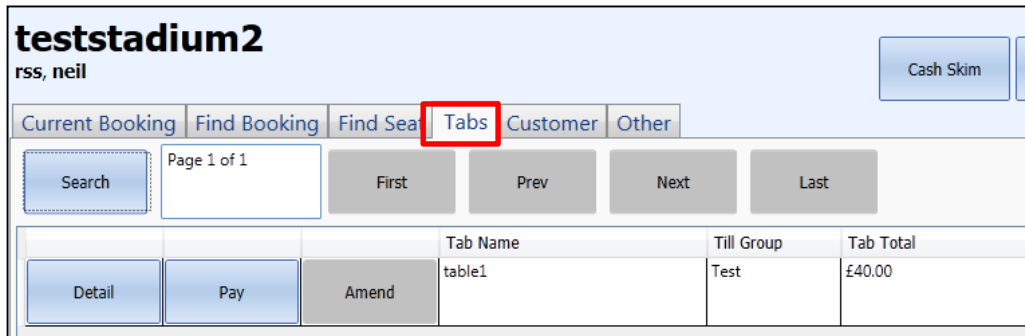
If your [F&B/Kiosk Channel](#) has been set up to use pin codes with Tabs, when you attempt to add an item to an existing Tab you will be requested to enter the **Tab Pin**. The details of the pin will be given to you by the customer. You will only be able to add items to an existing Tab if the correct pin is given.

- g) The Tab dialog will be redisplayed. Select **Exit** to continue.

2.4. MAKING PAYMENT FOR A TAB IN THE POS

When the customer is ready to make payment for the Tab, do the following within the POS:

- a) Select the **Tabs** heading as shown below.

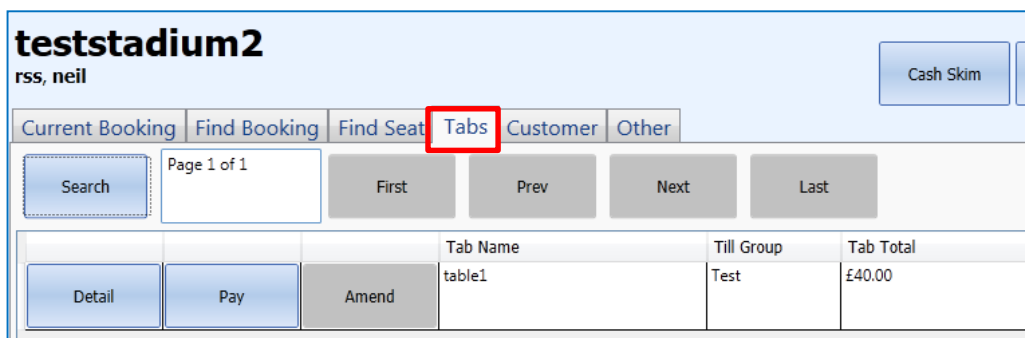


- b) A list of the current open Tabs will be displayed.
- c) Select **Pay** alongside the Tab that you wish to pay. If you wish to review the details of the Tab first, select **Detail** to open the Tab details. From the Details dialog you can select **Pay** to continue.
- d) The shopping cart will be opened displaying details of all of the items added to the Tab. Select **Add Payment** to continue.
- e) The Payment Method dialog will be displayed. Select the appropriate option and process the customer payment.

2.5. AMENDING A TAB IN THE POS

If the customer disputes the items included on the Tab or the items are incorrect, the details can be amended as follows:

- a) Select the **Tabs** heading as shown below:



- b) A list of the current open Tabs will be displayed.
- c) Select **Pay** alongside the tab that you wish to settle.
- d) The Tab details will be opened in the shopping cart. If the details are incorrect, re-open the Tabs view.

teststadium2
rss, neil

Cash Skim

Current Booking Find Booking Find Seat **Tab**s Customer Other

Search Page 1 of 1 First Prev Next Last

		Tab Name	Till Group	Tab Total
Detail	Pay	table2	Test	£40.00

- e) Alongside the Tab you have selected to pay, the Amend option will now be available. Select **Amend** to continue.
- f) The shopping cart will be refreshed to show the Tab details in the edit mode. Make the necessary changes to the Tab before selecting **Add Payment** to continue.
- g) The Payment Method dialog will be displayed. Select the appropriate option and process the customer's payment.

3. PRODUCT CATEGORIES

The Category field on the [Bookable Product](#) form allows Products to be grouped. This is important for Food and Beverage Products when the [Terminal](#) is set to Till Mode- Yes, because the Button Colours entered into the Analysis Category form can be seen for each product. This makes it easier and quicker for Booking Operators to distinguish certain Products, speeding up the sales process.

For example, an Analysis Category named Alcoholic Drinks could be created with a button colour of Red. All Bookable Products that represent an alcoholic drink (e.g. Fosters or Tenants) can be linked to this Category. Another Analysis Category called Hot Food could then be created with a button colour of Blue. All Bookable Products that represent Hot Food (e.g. Burger, Chips and Hot Dog) can be linked to this Category.

This process can be used for each Category of F&B products, as demonstrated below.

The screenshot shows the 'stadiumdemo' interface. At the top left, it says 'D1, SH'. On the right, there are buttons for 'Cash Skim' and 'Till Repo'. Below these are navigation tabs: 'Current Booking', 'Find Booking', 'Find Seat', 'Tabs', 'Customer', 'Coupon', and 'Cashless Accounts'. The main area displays a grid of product buttons:

Fosters (Half) 3.00	Fosters (Pint) 3.00	Tenants (Half) 3.50	Tenants (Pint) 3.50	Ginger Beer (Each) 1.50	Lilt (Each) 1.00	Pepsi (Each) 1.50
Chocolate Bar (Each) 2.00	Polos (Each) 2.00	Randoms (Each) 2.00	Burger (Each) 3.50	Chips (Each) 2.50	Hot Dog (Super Size) 7.50	Pizza Slice (Each) 4.00

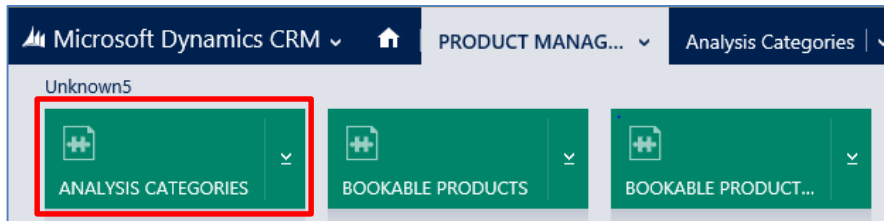
3.1. CREATING AN ANALYSIS CATEGORY

To create a new Analysis Category and add the Button Colours used for F&B Products, complete the following:

- Select or hover over the **Microsoft Dynamics CRM** tab before scrolling across the drop down list of the navigation bar and selecting **Product Management**.

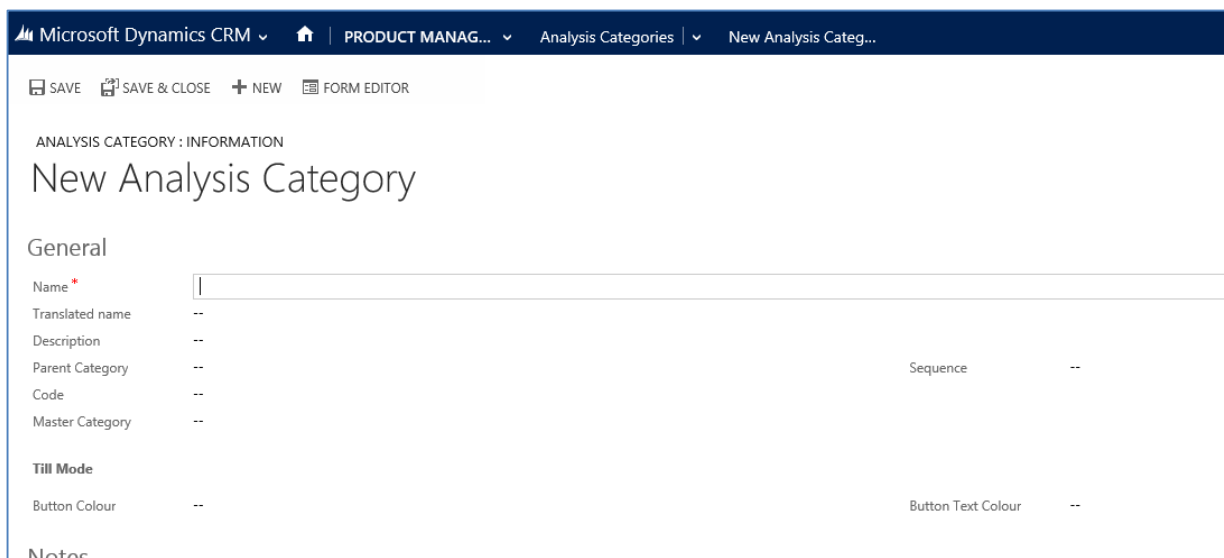
The screenshot shows the Microsoft Dynamics CRM navigation bar. The 'WORKPLACE' tab is selected. The navigation bar includes 'Dashboards', 'System Administrat...', and a user profile icon. Below the navigation bar, a list of modules is shown: 'BOOKINGS', 'PRODUCT MANAGEM...', 'VENUE MANAGEMENT', 'MEMBERSHIP', and 'PROMOTIONS'. The 'PRODUCT MANAGEM...' module is highlighted with a red box.

- b) Next, in the Product Management area of CRM, select the **Product Management** tab before choosing **Analysis Categories**.



- c) The Active Analysis Categories view will be displayed, select **New** on the ribbon.

- c) A new Analysis Category form will be shown. Complete the following details.



- **Name.** Enter the name of the Category, for example Alcoholic Drinks, Hot Food or Snacks.
- **Translated Name.** This field can be used for translated implementations, see the Go CRM 2015 Product Management User Guide for more information.
- **Description.** Enter a description of the Category.
- **Parent Category.** If applicable link the Category to a Parent Category.
- **Sequence.** Enter a Sequence number for the product. The Sequence number is used to determine the order in which Categories are displayed on the Web and POS.
- **Code.** This field is not required for F&B set up.
- **Master Category.** If applicable, link the category to a Master Category.
- **Button Colour.** Enter the Button Colour. All Bookable Products within this category will be displayed in the chosen colour in the Channel. Green 4 F&B uses standard Web colours e.g. Red, Orange, Green, etc.
- **Button Text Colour.** Enter the button text colour. Green 4 F&B uses standard Web colours e.g. red, orange, green, etc.

- d) When the details are complete select **Save and Close** on the ribbon, repeat this process until all Product Categories have been created.

4. SETTING UP F&B PRODUCTS

Food and Beverage products are set up within CRM as Stock type Bookable Products. The Go CRM 2015 Product Management User Guide gives in depth instruction showing how a Stock type Bookable Product is created.

In order for the Stock type Bookable Product to appear on sale an appropriate Sales Plan type of Other with a linked Channel Price should have been created. Furthermore, a valid Variant Price List and Variants need creating beforehand. Information on each of these is given in the GO CRM 2015 Product Management User Guide.

The table below indicates the process that should be followed to place a Stock type Bookable Product on sale. For more detailed information on Stock type Bookable Products, please see the GO CRM 2015 Product Management User Guide.

Task	Comments
1. Create the Variant Types	Create the type of the Product that you can purchase. For example a type of drink Bookable Product may have Variant Types of a Pint and Half pint, whereas a food product usually has a Variant Type of Each.
2. Create the Variant Price Lists	The Variant Price List is selected in the Variant and Pricing section of the Bookable Product form, also where the pricing of the product is entered into. The Variant Price Lists are also subsequently linked to the Channel using the Channel Price List entity.
3. Create a Channel Price List	The Channel Price List should be linked to the Sales Plan type of Other. The Channel Price List should link the Channels to the Variant Price List on which Prices have been entered. Ensure the Channel Price List dates are valid. A Channel Price List will need to be created for each Variant Price List – Channel combination created.
4. Create a Stock type Bookable Product	In the Bookable Product form, complete the following mandatory fields. Fields that are not listed below can be completed if additional functionality is required. For more information see the GO CRM Product Management User Guide: <ul style="list-style-type: none"> • Name. Enter a name for the product, e.g. Burger, Hotdog or Coca Cola • Type. Use the drop-down list to select Stock. • Beneficiary Requirement. Use the drop-down list to select if a customer's name is required when the product is purchased. For F&B products this option should be set to Not Required. • Code. Can be used to enter the barcode for products sold through the Green 4 F&B POS.

	<p>Referring Entities:</p> <ul style="list-style-type: none"> • Category. Use the Look Up Records dialog to select the product category. The category is used to group products, for example Alcoholic Drinks, Hot Food, Soft Drinks etc. <p>Cost:</p> <ul style="list-style-type: none"> • Cost Price & Unit. If applicable this field can be used for F&B product reporting. The cost price and unit fields are used to carry out conversions for reporting purposes. The cost price is the price paid per unit. The unit is the size of the original purchase. For example for beer it might be barrels, whereas for wine it may be bottles. The Conversion Factor field on the Product Variant form determines how many of the products make up a unit. For example the number of pints in a barrel. <p>Select Save on the ribbon.</p>
5. Assign the F&B/Kiosk Channels to the Bookable Product	Place a tick in the F&B/Kiosk Channels the Product is to be sold on.
6. Assign the F&B Variants to the Bookable Product	Select the appropriate Variant(s) for the Bookable Product that is being created. For example if creating a Carlsberg the Variants of Pint and Half Pint may be selected. Whereas if creating a Hot Dog or Burger, the Variant of Each could be added.
7. Select the Variant Price List and assign the prices to the Bookable Product	An active Variant Price List that is part of a valid Channel price List should be selected from the drop down. The prices of the product should then be assigned.

5. F&B STOCK HANDLING

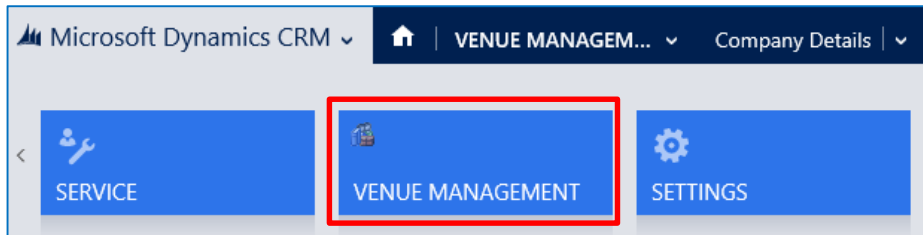
Any [Bookable Product](#) of type Stock will maintain a stock level and therefore this includes F&B products. The Stock level is decreased or increased through normal POS/WEB booking operations, by the use of [Stock Transaction](#) records which are created whenever a Stock type Bookable Product is sold or credited. An entity called [Product Variant Location Stock Level](#) is used to record these stock levels. The stock level is updated every time a stock transaction record is created.

5.1. ENABLING STOCK HANDLING- CHANNEL SETTINGS

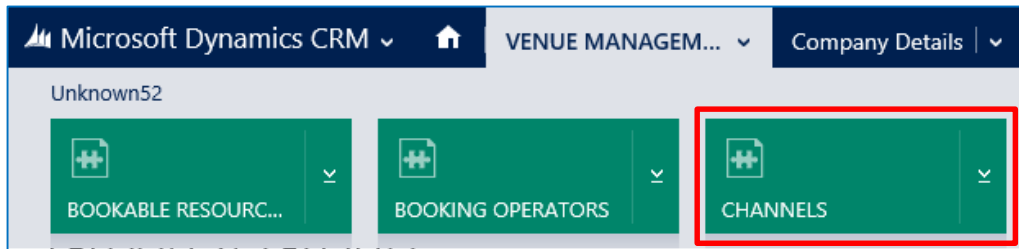
If stock levels are to be tracked and displayed for each product on the relevant Sales Channels a number of flags must be completed within the Channel form.

To enable the handling of Stock, complete the following:

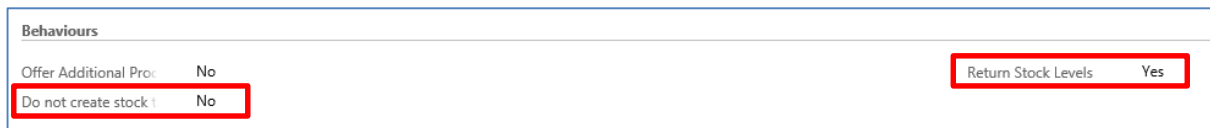
- Within CRM, select the **Microsoft Dynamics CRM** tab in the navigation bar before scrolling across and choosing **Venue Management** from the drop down.



- b) Next select the **Venue Management** tab in the navigation bar and from the drop down choose **Channels**.



- c) A list of any Active Channels will be displayed, select and open the relevant Channel where stock handling is to be enabled.
 d) Within the Channel form, ensure the following flags have been set.



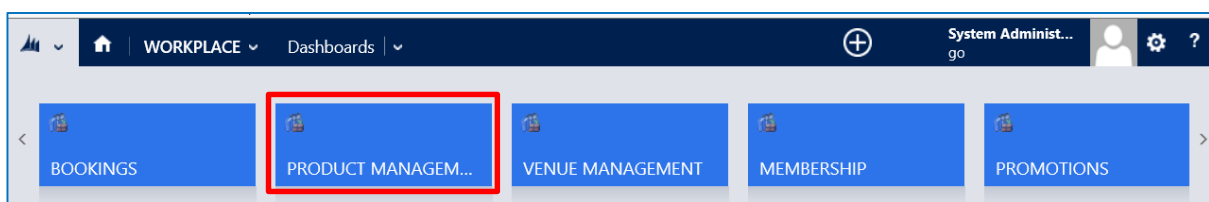
- **Do not create Stock Transactions.** Set to **No**, this will allow [Stock Transactions](#) to be created.
 - **Return Stock Levels.** Set to **Yes**, this will allow Stock Levels to be returned.
- e) Select the **Save** icon in the bottom right hand corner of the screen.

5.2. CREATING A STOCK MOVEMENT

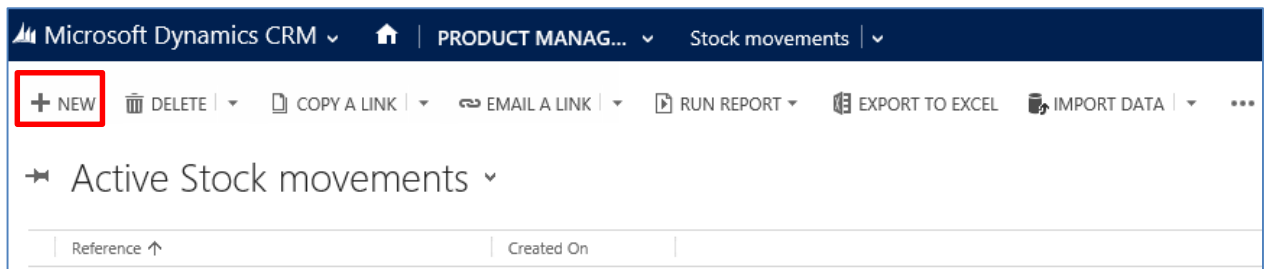
A Stock movement is the starting point for managing the stock in your system. Within CRM there is a facility to increase (or decrease) the available stock figure by the means of a Stock movement. Stock Movements consist of 1 or many movement lines. These movement lines are recorded as [Stock Transaction](#) records within the system. The stock movement is the header record which acts as a grouping for the transaction records.

To create a Stock Movement, complete the following:

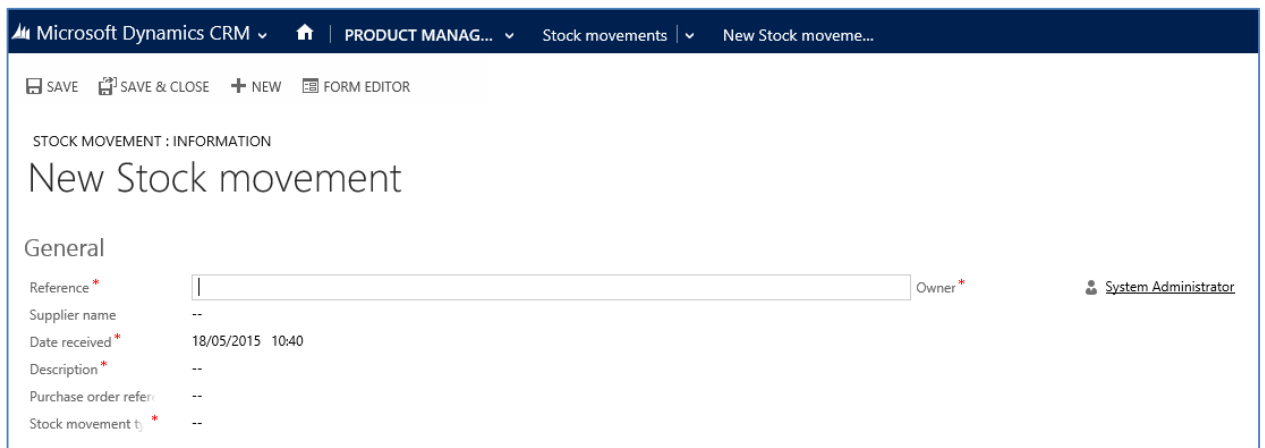
- a) Select or hover over the **Microsoft Dynamics CRM** tab before scrolling across the drop down list of the navigation bar and selecting **Product Management**.



- b) Next, in the Product Management area of CRM, select the **Product Management** tab before choosing **Stock Movements**.
- c) The Active Stock movements view will be displayed, select **New** on the ribbon.



- d) A new Stock Movement form will be displayed, complete the following:



- **Reference:** Text field which can contain a reference to a physical entity such as delivery note paper work etc.
- **Supplier name:** If applicable enter the Name of the third party supplier of goods.
- **Date received:** This field will default to the date/time when the stock movement record has been created, (and can be changed to indicate the actual date/time that the physical stock was received/adjusted/transferred).
- **Description.** Enter any text to indicate any other relevant details about the Stock movement.
- **Purchase order reference:** If applicable this field can be used to indicate a link back to an 'external' purchase order.
- **Stock movement type:** From the drop down choose the applicable Stock movement type:
 - **Adjustment:** A manual adjustment of stock to initially set stock figures for product variants, or used to set the correct figures after a stock-tacking process has completed.
 - **Goods received note:** Used to indicate that stock has been purchased and delivered to the organisation at the till-group level.
 - **Stock transfer:** Used to indicate that stock has been moved from one till-group to another till-group. Typically this stock movement will have two transaction lines – one being negative, (from the sending till group) and a positive transaction for the same amount at the receiving till-group.

- e) Select **Save and Close** on the ribbon.

EXAMPLE OF STOCK MOVEMENT RECORD CREATED

The example in the table below shows the mandatory fields that have been completed for a Stock Movement record, created for demonstration purposes for this document.

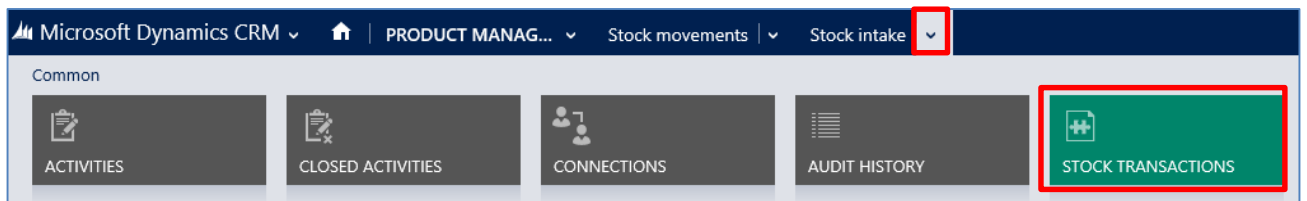
Record Type	Reference	Supplier Name	Date Received	Description	Stock Movement Type
Stock Movement	Ref: 29848	G4 Suppliers	17/02/93 10:56	New intake Chocolate bars	Good Received Note (GRN)

5.3. CREATING STOCK TRANSACTIONS

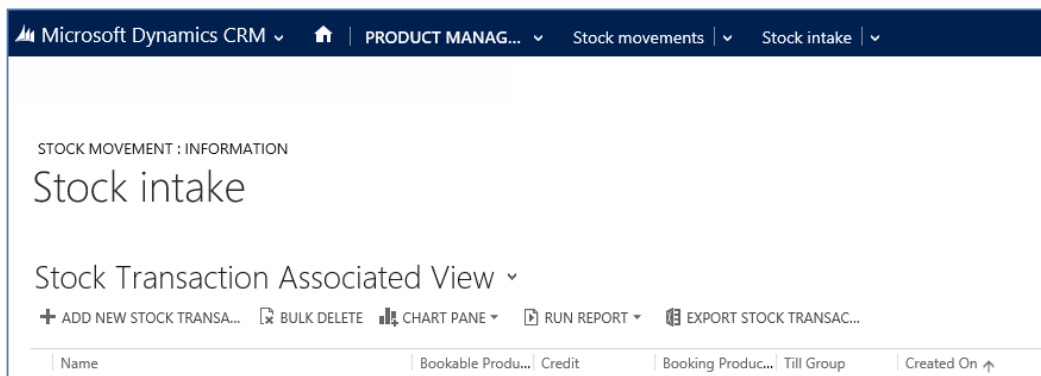
When a [Stock movement](#) has been created it is possible to enter as many movement lines (Stock Transactions), which are applicable to that movement. Stock Transactions are therefore used to increase or decrease the stock levels.

To link a Stock Transaction to a Stock Movement, complete the following:

- With the [Stock Movement](#) form open, select the small arrow next to the name of the Stock Movement.



- The Stock Transaction Associated View will be displayed, select **Add New Stock Transaction** on the ribbon.



- A new Stock Transaction form will be displayed, complete the following:
 - Name.** Enter a name for the Stock Transaction, for example Delivery Received 19th September 2014.
 - Till Group.** Use the magnifying glass to look up and select the location at which the transaction is recorded (mandatory).
 - Product variant.** Use the magnifying glass to look up and select the Product Variant which the Stock Transaction is referring to e.g. chocolate bar (Each). If there are multiple Product Variants for the same product, for example Large, Medium and Small, a new Stock Transaction for each Product Variant is required.

- **Credit.** Enter a whole number, (positive or negative) which will influence the stock-level figure for the Product Variant at the location. For example if the stock of the selected Product Variant is 100, enter 100.
- **Booking product.** Not applicable when creating a stock transaction for a Stock movement.
- **Created On.** This field will default to the date/time when the Stock Transaction is created within CRM. These two values cannot be altered after a transaction record has been created.

d) Select **Save and Close** on the ribbon.

EXAMPLE OF STOCK TRANSACTION RECORD CREATED

The example in the table below shows the mandatory fields that have been completed for a Stock Transaction record, created for demonstration purposes for this document.

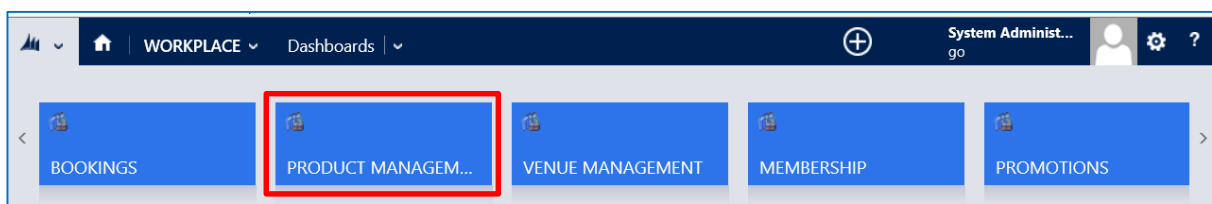
Record Type	Name	Till Group	Product Variant	Credit
Stock Transaction	Delivery received 18 th May 2015	F&B Tills	Kit Kat (Each)	100

5.4. PRODUCT VARIANT LOCATION STOCK LEVELS

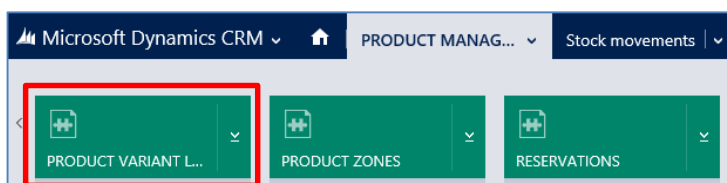
Upon creating a [Stock Movement](#) and [Stock Transaction](#) the level of stock available for each Product Variant can be viewed in the Product Variant Location Stock Levels entity within CRM.

To view the stock levels of a particular product, complete the following within CRM:

- a) Select or hover over the **Microsoft Dynamics CRM** tab before scrolling across the drop down list of the navigation bar and selecting **Product Management**.



- b) Next, in the Product Management area of CRM, select the **Product Management** tab before selecting **Product Variant Location Stock Levels**.



- c) The Active Product variant location stock levels view will be displayed. This will list all Till Groups, associated Product Variants and their Stock Levels and will update every time the applicable Product Variant is sold.

The screenshot shows the Microsoft Dynamics CRM interface. At the top, there is a navigation bar with 'Microsoft Dynamics CRM', a home icon, and a dropdown menu for 'PRODUCT MANAG...'. Below this is a secondary navigation bar with options: '+ NEW', 'DELETE', 'COPY A LINK', 'EMAIL A LINK', 'RUN REPORT', and 'EXPORT TO'. The main content area is titled 'Search Results' and contains a table with the following data:

Till group	Product variant	Stock level	Created On
Admissions Offi...	Cheese Burger a...	-7	11/06/2014 11:44

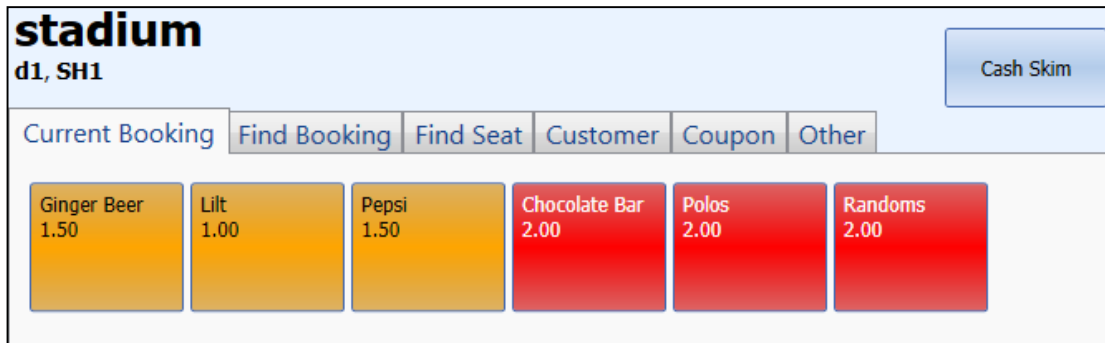
Stock Levels will also be displayed on the POS as can be seen in the example highlighted below:

The screenshot shows the StadiumTest POS interface. At the top left, it says 'StadiumTest D1, SH1'. On the right, there are buttons for 'Cash Skim' and 'Till Report'. Below this is a navigation bar with tabs: 'Current Booking', 'Find Booking', 'Find Seat', 'Tabs', 'Customer', 'Coupon', 'Cashless Accounts', 'Other', and 'Access Gate'. The main area shows 'Other>chocolate>Kit Kat'. Below this, there is a product entry for 'Kit Kat (Each)' with a price of '£ 0.50' and 'Available stock: 139' (highlighted with a red box). To the right of the product entry is a quantity selector with 'QTY: - 0 +' and a 'CONTINUE' button.

6. PURCHASING PRODUCTS WHEN IN TILL MODE

If accessing the POS when the [Terminal](#) has been set to **Till Mode- Yes**, each product will be displayed in their relevant Analysis Category in a colour coordinated fashion as outlined below:

- a) Click on the required Products listed on the Current Booking tab.



- b) One simple click will add the item to the shopping basket.
- c) The number of items in the cart can be modified as follows:
- **Increase Number.** Either click the appropriate item on the Current Booking tab again, or enter the number required directly into the shopping basket area.
 - **Decrease Number.** Click **Reduce** alongside the appropriate row in the shopping basket area.
 - **Remove Item.** Click the **X** button alongside the appropriate row in the shopping basket area.

Reference No.:					
Name	Unit	Qty	Line		
Pepsi	£1.50	1	£1.50	X	Reduce

- d) When all the items are listed in the shopping basket, select **Add Payment**.
- e) If more than one Payment Method is available, the Payment Method dialog will be displayed. Select the appropriate Payment Method.
- f) The Payment Method dialog will be opened. Enter the payment details before selecting **Pay** to complete the booking.

End of Document