

CRM DRIVEN SOLUTIONS FOR SPORT & LEISURE

GREEN 4 TICKETING

3.6. BOOKING AND PRODUCT MANAGEMENT



Microsoft Partner
Gold Independent Software Vendor (ISV)

CONTENTS

| | |
|---|----|
| About this Document..... | 5 |
| Non-Disclosure | 5 |
| Copyright | 5 |
| Document Control | 5 |
| Contact..... | 6 |
| 1. Introduction..... | 7 |
| 2. Booking Management | 8 |
| 2.1. Finding a Booking..... | 8 |
| 2.2. Booking Form..... | 10 |
| Summary..... | 10 |
| Discount..... | 10 |
| Payment..... | 11 |
| Delivery Address..... | 11 |
| Ticket Collection | 11 |
| Operation..... | 11 |
| Linked Bookings..... | 12 |
| 2.3. Related Items..... | 12 |
| 2.4. Advanced Find | 13 |
| 2.5. Examples of an Advanced Find | 16 |
| 2.6. Saving Advanced Find Results | 18 |
| 2.7. How to Share the View | 19 |
| 3. Product Management – Putting a Product on Sale | 22 |
| 3.1. Overview..... | 22 |
| 3.2. Variant Types | 27 |
| Variant Type Components..... | 28 |
| 3.3. Variant Price Lists | 30 |
| 3.4. Sales Plans | 31 |
| 3.5. Placing a new Fixture On Sale..... | 32 |
| Step 1: Create the Fixture Sales Plans | 32 |

| | |
|--|----|
| Step 2: Create the Fixtures Channel Price Lists | 34 |
| Step 3: Create the Fixtures | 36 |
| Step 4: Create a Series and add the Fixtures | 39 |
| Step 5: Create the Fixture Bookable Product | 42 |
| Fixture Ticket On Sale Check List | 46 |
| 3.6. Placing a new Series on Sale | 47 |
| Step 1: Create the Series Sales Plans | 47 |
| Step 2: Create the Series Channel Price Lists | 48 |
| Step 3: Create the Series | 51 |
| Step 4: Add the Fixtures to the Series | 53 |
| Step 5: Create the Series Bookable Product | 55 |
| Series On Sale Check List | 59 |
| Examples: Using Sales Plans to set up a Series and Fixtures | 60 |
| 3.7. Setting up Away Fixtures and Travel Products | 67 |
| The Process | 67 |
| Step 1: Creating an Away Bookable Resources | 67 |
| Step 2: Creating an Away Venue | 68 |
| Step 3: Creating a Block to Represent the Away Capacity | 69 |
| Step 4: Creating An Away Venue Configuration | 71 |
| Step 5: Create a Venue Configuration Block & Bookable Resource | 73 |
| Step 6: Set up Your Away Series and Fixture | 74 |
| Step 7. Capturing Away Ticket Information in the POS | 77 |
| 3.8. Setting Up Stock Bookable Products | 80 |
| Step 1: Set Up your Channel Price Lists | 80 |
| Step 2: Create the Bookable Product | 81 |
| Stock Product On-Sale Check List | 85 |
| Upselling Products (Additional Products) | 85 |
| 3.9. Setting Up Products as Memberships | 87 |
| Step 1: Membership Number Set Up | 87 |
| Step 2: Setting Up your Channel Price List | 88 |

| | |
|---|----|
| Step 3: Create the Bookable Product | 89 |
| 3.10 Entitlements | 93 |
| Entitlements and the Channel Price Lists | 93 |
| Entitlements and The Channels | 94 |
| 4. Miscellaneous | 96 |
| The Bulk Set up of Many Products..... | 96 |
| Set up for Multi Lingual using the Translation and Description fields | 97 |
| Product Calendars | 97 |

ABOUT THIS DOCUMENT

This document has been prepared as a User Guide for Ticketing 3.6. Booking and Product Management.

NON-DISCLOSURE

All information contained in this document is to be treated as confidential information provided for the purpose of using Green 4 Solutions modules.

COPYRIGHT

© Green 4 Solutions Ltd

While every effort has been made to ensure the accuracy of the information contained in this publication, the information is supplied without representation or warranty of any kind, is subject to change without notice and does not represent a commitment on the part of Green 4 Solutions Limited. Green 4 Solutions Limited therefore, assumes no responsibility and shall have no liability, consequential or otherwise, of any kind arising from this material or any part thereof, or any supplementary materials subsequently issued by Green 4 Solutions Limited. Green 4 Solutions Limited has made every effort to ensure the accuracy of this material.

DOCUMENT CONTROL

| Version | Date | Change | Initials |
|---------|----------|--|----------|
| V1.00 | 17/10/14 | This is a new document | JW |
| V 1.1 | 09/01/15 | Updated section on putting new Fixtures and Series on sale | JW |
| V 1.2 | 26/01/15 | Updated with section on Entitlements added. | JW |

CONTACT

Any correspondence should be addressed to:

Product Development

Green 4 Solutions Limited

16-17 Midland Court

Central Park

Lutterworth

Leicestershire

LE17 4PN

UK

Phone: +44 (0) 845 508 8149

Email: support@green4.com

Web: www.green4solutions.com

1. INTRODUCTION

This user guide provides information on how to manage bookings in the Green 4 Ticketing Solution and how to set up products for sale. The set-up of the different product types is described.

This document covers the following:

Booking Management

- Finding a booking
- Analysing a booking
- Using Advanced Find
- Saving Advanced Find Results
- Sharing Advanced Find Results.

Product Management

- Setting up Variant Types and Variant Price Lists
- Setting up Bookable Products of different types
- Using Sales Plans with Channel Prices Lists to put products on sale

Other user guides available include:

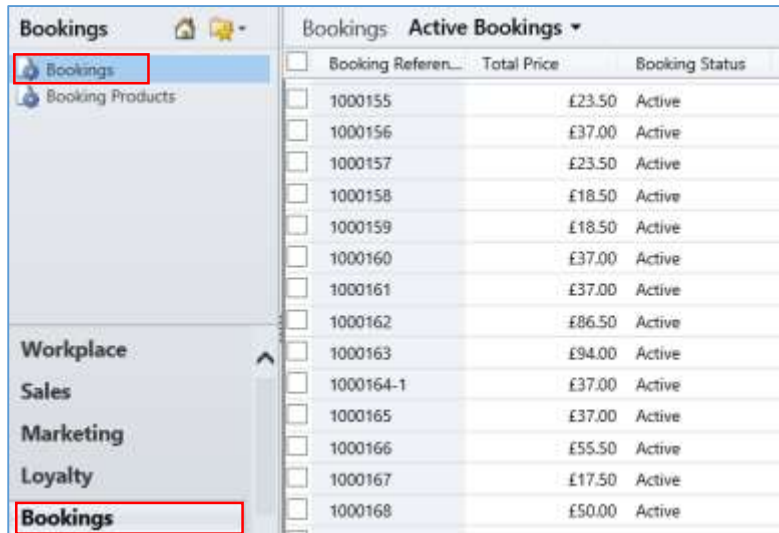
- Customer Management
- Infrastructure Set Up User Guide
- Venue Management User Guide
- Ticketing Reservations User Guide
- Delivery Options, Delivery Charges, Additional Charges
- Promotions, Coupons and Vouchers User Guide
- Gift Aid and Donations User Guide
- Retail User Guide
- Reporting using The Data Cube
- ECommunications

2. BOOKING MANAGEMENT

2.1. FINDING A BOOKING

When a ticket is sold or a booking made via the ticketing website or POS, a new booking record is created within CRM. To view a list of bookings within CRM carry out the following:

- a) In CRM, select **Bookings** from the **Bookings** tab in the navigation area.



| Bookings | | Bookings: Active Bookings ▾ | | |
|--------------------------|--------------------|-----------------------------|----------------|--|
| <input type="checkbox"/> | Booking Referen... | Total Price | Booking Status | |
| <input type="checkbox"/> | 1000155 | £23.50 | Active | |
| <input type="checkbox"/> | 1000156 | £37.00 | Active | |
| <input type="checkbox"/> | 1000157 | £23.50 | Active | |
| <input type="checkbox"/> | 1000158 | £18.50 | Active | |
| <input type="checkbox"/> | 1000159 | £18.50 | Active | |
| <input type="checkbox"/> | 1000160 | £37.00 | Active | |
| <input type="checkbox"/> | 1000161 | £37.00 | Active | |
| <input type="checkbox"/> | 1000162 | £86.50 | Active | |
| <input type="checkbox"/> | 1000163 | £94.00 | Active | |
| <input type="checkbox"/> | 1000164-1 | £37.00 | Active | |
| <input type="checkbox"/> | 1000165 | £37.00 | Active | |
| <input type="checkbox"/> | 1000166 | £55.50 | Active | |
| <input type="checkbox"/> | 1000167 | £17.50 | Active | |
| <input type="checkbox"/> | 1000168 | £50.00 | Active | |

- b) A list of active bookings will be displayed. To search for a particular booking enter the booking reference in the search box at the top of the view and click the search icon:

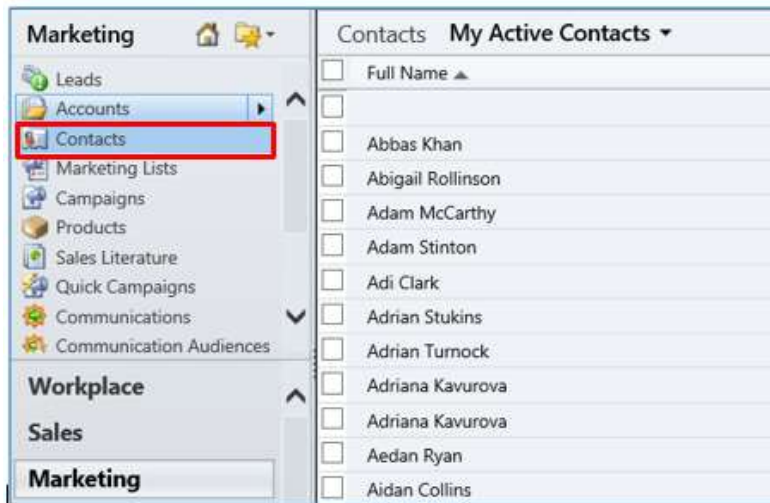


| Bookings | | Active Bookings ▾ | | | Search for records | | | |
|--------------------------|--------------------|-------------------|----------------|----------------|--------------------|---------|-------------------|-----------|
| <input type="checkbox"/> | Booking Referen... | Total Price | Booking Status | Parent Booking | Booking Referen... | Channel | Unrefunded Val... | Refund Vi |
| <input type="checkbox"/> | 1000000 | £37.00 | Active | | | POS | £0.00 | |
| <input type="checkbox"/> | 1000001 | £37.00 | Active | | | POS | £0.00 | |

- c) The list of bookings will be revised to show bookings that match on the booking reference only. Other search criteria that can be used here are Contact Name.
- d) To open a booking, click over the booking reference.
- e) The booking will be displayed in the form view.

To view bookings linked to a contact:

- a) In CRM, select **Contacts** from the **Marketing** tab in the navigation panel.



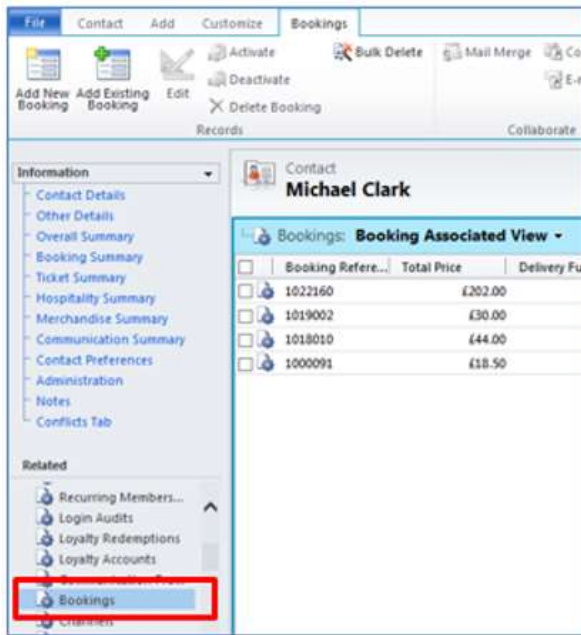
b) Search for the relevant contact using the search box at the top of the view.



Note. An asterisk or wildcard the ‘*’ character can be used to search on partial text. For example if you need to search for the surname ‘Ryan’ but do not know the first name of the contact, by entering a ‘*Ryan’ will list all contacts with the surname Ryan.

Fields that can be searched in this view include: Email, First Name, Full Name, Last Name, Middle Name and Parent Customer.

- c) The list of contacts will be revised to display those that match on the details entered in the search area.
- d) To open the contact record, click over the individual’s name.
- e) The contact record will be opened in the form view.
- f) To view the bookings linked to the contact’s record, select **Bookings** in related area:



- g) To view the details of a booking, click over the booking reference number.
- h) The details of the booking will be displayed in the form view.

2.2. BOOKING FORM

SUMMARY

The summary area displays basic information relating to the booking for example the booking reference, total price, purchaser and channel. If a comment has been added to the booking this will be shown also.

If the Green 4 Retail module is in use, the Retail Order Status field is used for tracking the status of merchandise that needs to be picked and dispatched.

| General | | | |
|-------------------|------------------------------------|---------------------|------------|
| Summary | | | |
| Booking Reference | Imported 5604 | Order Type | |
| Total Price | £413.62 | Purchaser | Mark Allen |
| Channel | POS | No Purchaser Reason | |
| Comment | VM Price class: EB 2 Adult 1 Child | | |
| RetailOrderStatus | Shipped | | |

DISCOUNT

The Discount area will display the details of any promotions that have been applied to the booking. The example below illustrates the information that may be displayed. Note: Discounts in the system are set up as payment methods.

| Discount | | | |
|----------------|--|-----------------|--|
| Discount Value | <input type="text" value="£ 20.00"/> | Discount Reason | <input type="text" value="Promotion:halfprice"/> |
| Discount Code | <input type="text" value="halfprice"/> | Promotion | Half price tickets vs Monaco |

PAYMENT

The Payment area will display a summary of the payments taken. Note, because multiple payment methods can be used against a booking, the Payment Method, Card Details or Invoice Number fields will not be filled in.

| Payment | | | |
|-------------------|---|-------------------|---|
| Payment Method | <input type="text"/> | Card Details | <input type="text"/> |
| Refund Value | <input type="text" value="£ 32.68"/> | Unrefunded Value | <input type="text" value="£ 0.00"/> |
| Invoice Number | <input type="text"/> | Emailed Operator | <input checked="" type="radio"/> No <input type="radio"/> Yes |
| Emailed Purchaser | <input checked="" type="radio"/> No <input type="radio"/> Yes | Fulfilment Status | <input type="text"/> |

DELIVERY ADDRESS

If the customer has selected a delivery address for the order, this will be shown in the delivery address area.

| Delivery Address | | | |
|----------------------------|--|----------|---|
| Label | <input type="text" value="Home"/> | City | <input type="text" value="Leicester"/> |
| Line 1 | <input type="text" value="Main Street"/> | County | <input type="text" value="Leicestershire"/> |
| Line 2 | <input type="text"/> | Postcode | <input type="text" value="LE11AA"/> |
| Line 3 | <input type="text"/> | Country | <input type="text"/> |
| Delivery Fulfilment Status | <input type="text"/> | | |
| Dispatch batch | <input type="text"/> | | |

TICKET COLLECTION

The ticket collection method field can be used to record the details of how the tickets are to be collected if this is set up.

| Ticket Collection | |
|--------------------------|----------------------|
| Ticket Collection Method | <input type="text"/> |

OPERATION

The Operation section is used to record details of the operator that made the booking. The information collected will include the name of the booking operator and the till used.

Operation

Booking Operator: Ticket Printed: No Yes

Till: Booking Terminal:

Media Code: Transaction Code:

Booking Number: Loyalty Processed: No Yes

Vouchers Collected: No Yes

LINKED BOOKINGS

The Linked Bookings area is used to record details of the booking thread.

Linked Bookings

Next Booking: Previous Booking:

Renewed Booking:

Within Green 4 Ticketing, when a booking is edited a booking thread is created to handle the transfer of payment and products from the original booking to the revised booking. For example in the screenshot below, the initial booking 1000534 has been revised. The new booking has the reference 1000534-1. The booking with the reference 1000534-R is the reversal of the original booking.

| Booking Ref | Booking Status | Total Price |
|-------------|----------------|-------------|
| 1000534 | Inactive | 247.00 |
| 1000534-1 | Active | 247.00 |
| 1000534-R | Inactive | -247.00 |

2.3. RELATED ITEMS

Related to the booking are a number of additional entities that are relevant, these will give you additional information relating to the booking made:

- **Booking Payments.** The Booking Payments area will list individual payment methods used to complete the booking. To view the details of the payment, click on the payment name.
- **Booking Products.** The Booking Products area will displayed details of the products bought. Via the booking product you will be able to navigate to the actual Bookable Product and variant purchased. The booking product record will display the actual price paid for the product.
- **Booking Tickets.** The Booking Tickets area will display details of the tickets that have been generated for the booking. The booking tickets area will record information such as whether the ticket has been printed, cancelled, whitelisted or blacklisted (for access control).
- **Seat Allocations.** The Seat Allocations will list the seats allocated to the booking. The information will include the block, row and seat that has been allocated to the individual. This will reflect the seat picked during the sales process. It is possible to display the Product User under Seat Allocations in the Booking Form. To do this:
 - a) Select **Seat Allocations** in the Booking forms navigation area.
 - b) A list of the Seat Allocation bookings will be displayed. Place a tick in the relevant booking and double click on the booking to open it.

- c) The Seat Allocation form will be displayed. In the navigation area select **Product Users**.
- d) This will display the Product Users related to the booking. To open the Product Users details, tick the box next to the name of the user before double clicking on the name, a Product User form will then be displayed.

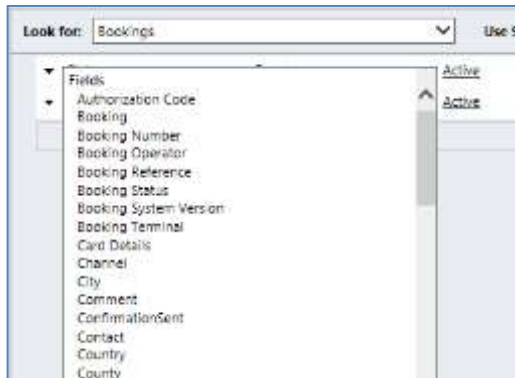
2.4. ADVANCED FIND

Understanding the underlying data structure in CRM, allows you to effectively search for data in the database using the Advanced Find functionality. Using the advanced find you can search for records based on data included in one or more fields on the record. You can also base the search on information held in related records. For example you can search for Bookings for a given fixture with seats in a selected block. The following example will illustrate how to build the example described.

- a) In CRM, select **Advanced Find** on the ribbon.
- b) The Advanced Find view will be displayed.
- c) Select the **Details** menu option
- d) At the top of the dialog select the following:
 - **Look For.** Select **Bookings** from the drop-down list.
 - **Use Saved View.** Select **Active Bookings** from the drop-down list.



- e) The Advanced Find dialog will be updated as shown above. The search parameters linked to the view will be automatically added; in this instance two parameters are automatically listed Status = Active and Booking Status = Active.
- f) To add additional parameters, click **Select** (highlighted in the above) image.
- g) A list of fields on which you can search will be displayed. The list is divided into two sections:
 - **Fields.** The top section of the list lists fields that are part of the record type you are currently searching on. For instance in this example, we can see all the fields that form part of the booking record:

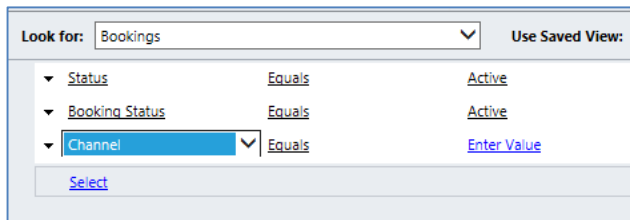


- **Related.** The bottom section of the list lists all of the entities that are related to the current record type. So in this example we see a list of all record types that are related to booking, including booking payments, booking products, seat allocation, etc.

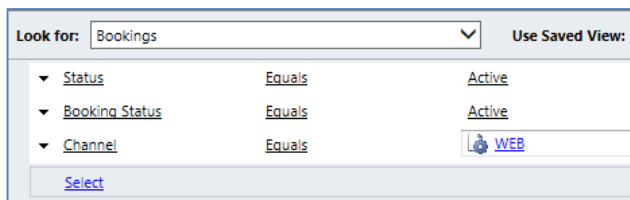


To use a **field** from the list:

- h) Select the appropriate field name from the list. A new row will be added to the advanced find as shown below:



- i) Complete the search term using the boxes provided.

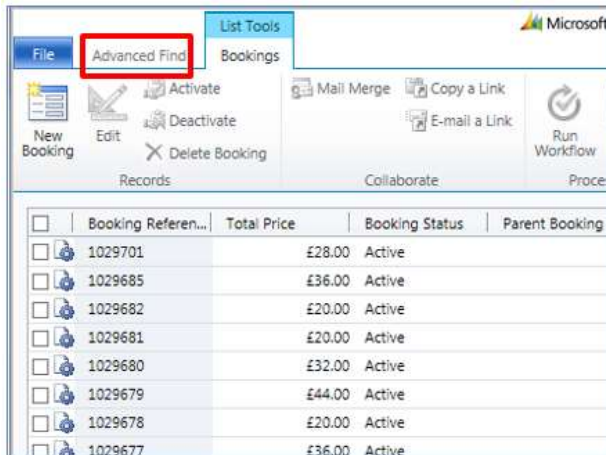


- j) To view the results of your search, click **Results** on the ribbon. A list of records meeting the conditions entered will be displayed.



Note. By default the search terms entered will be combined in an AND statement. Therefore in the example we have used above we will look for bookings where the status is active AND the booking status is active AND the channel is web. I.e. to display in the results, a record must match on all three search terms.

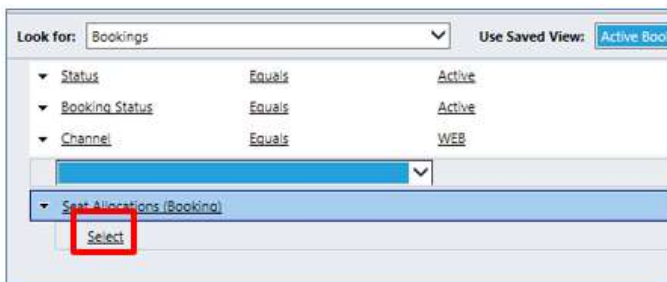
To combine search terms in an OR statement (i.e. show me records that match on search term 1 OR search term 2), select the arrowhead to the side of the rows that are to be joined in the OR statement and select **Select Row** from the list of options. Once all rows are selected click **Group Or** on the ribbon.



- k) To return to the search terms, select the **Advanced Find** tab heading (highlighted above). The search terms previously entered will be redisplayed allowing you to modify the details.

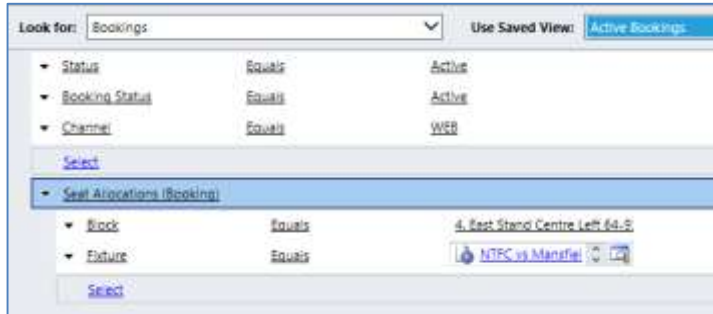
To use a **related field** from the list:

- l) Select the appropriate record type from the related section of the list. A new row will be added to the advanced find as shown below:



- m) The new row will be coloured blue to indicate it is a related record type. You will not be able to set any parameters on this row.
- n) To set a search term based on the related entity, click **Select** below the blue related row (highlighted above).
- o) A list of fields will be displayed. As before the list will be divided into two sections:
- a. **Fields.** The fields section will list all of the fields from the related record, e.g. fields on the Seat Allocation record in the example above.

- b. **Related.** The related section will list all of the record types that are related to the current record type, i.e. all record types that are linked to seat allocation in the example above.
- p) Select the appropriate field or related item from the list. A new row will be added to the advanced find dialog. Complete the details as required. For example:



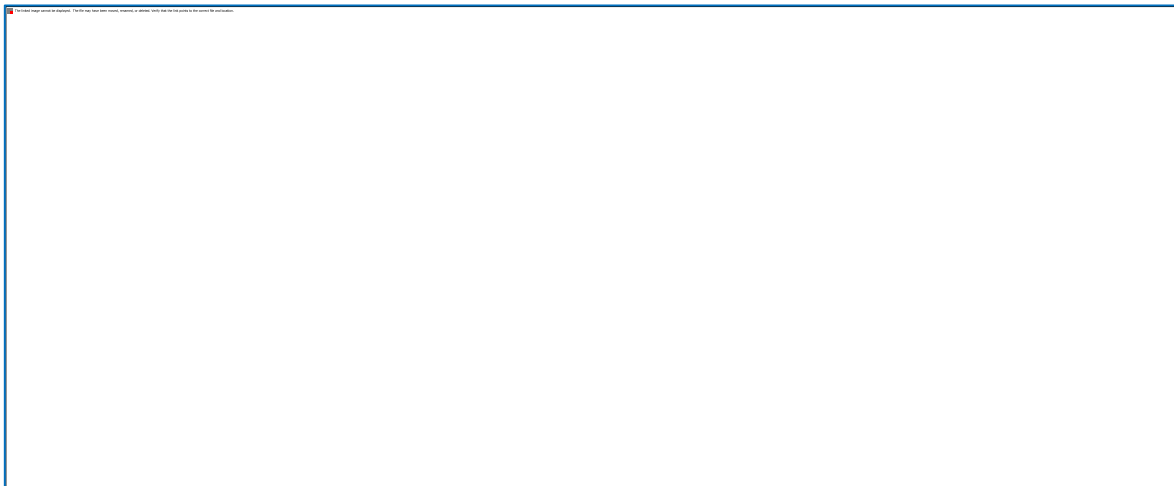
- q) To view the results of your search, click **Results** on the ribbon. A list of records meeting the conditions entered will be displayed.

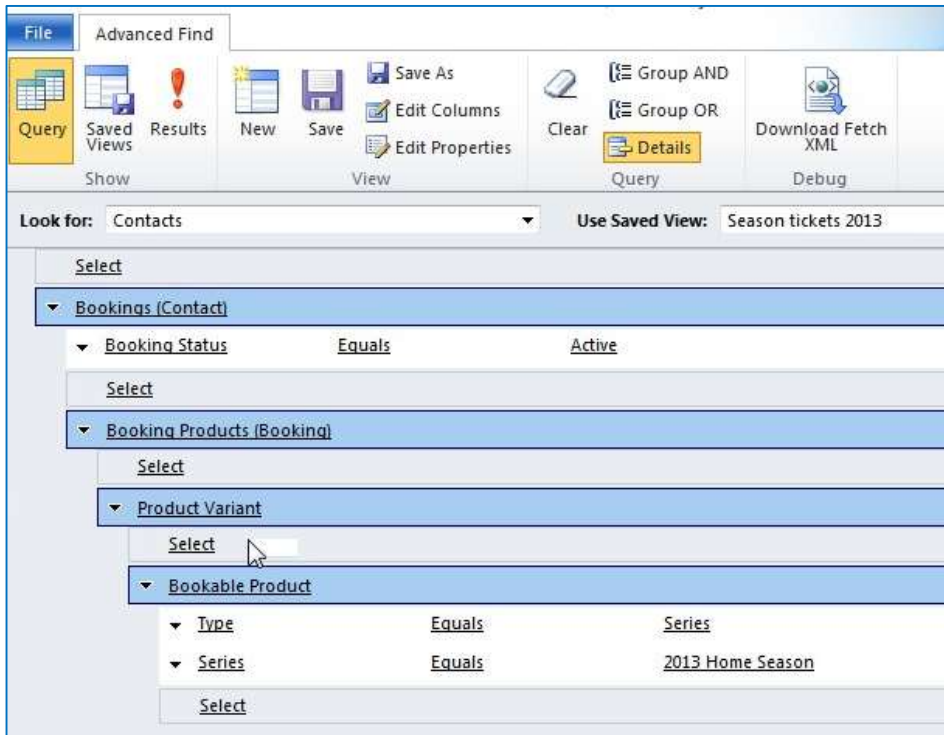
2.5. EXAMPLES OF AN ADVANCED FIND



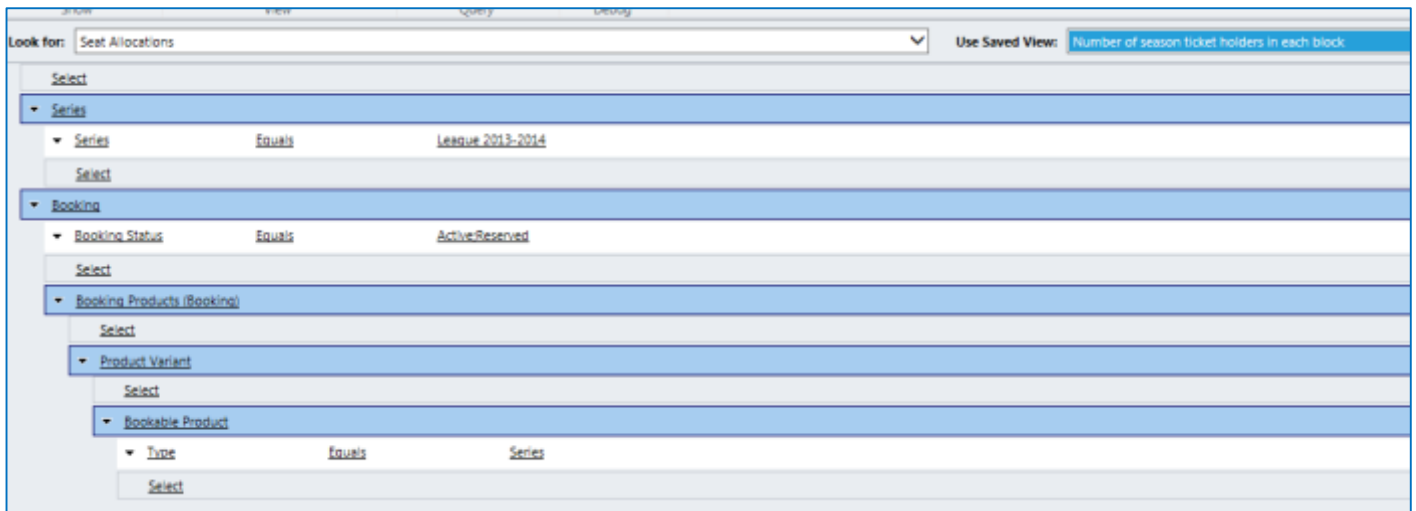
Note. The examples shown below are all dependant on how the setup of the system has been completed and therefore may differ between setups.

The below Advanced Fine examples demonstrates how it is possible to set up an Advanced Find to show the contact information for all Active **Season Ticket Holders**.

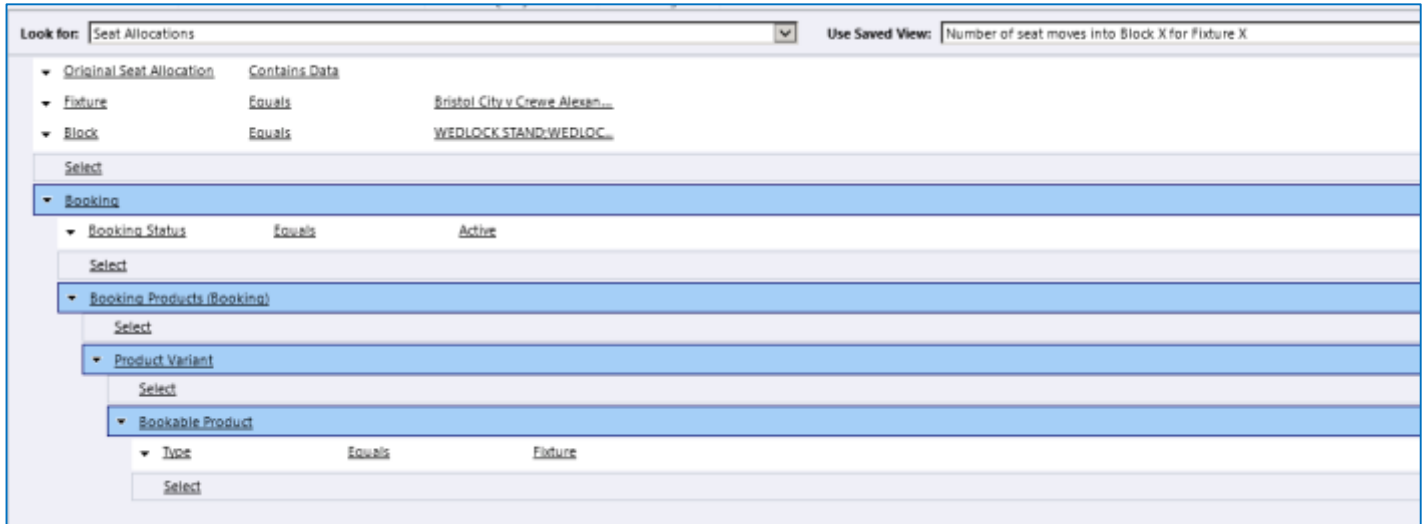




The following Advanced Find example demonstrates how it is possible to set up an Advanced Find result to show the **Number of Season Ticket holders in each block**.



The following Advanced Find example demonstrates how it is possible to set up an Advanced Find result to show the **Number of seat moves into a particular block for a certain fixture.**

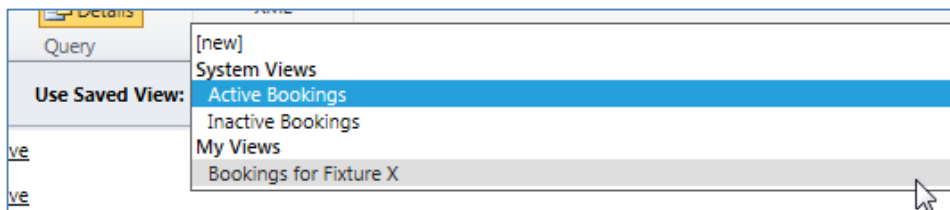


2.6. SAVING ADVANCED FIND RESULTS

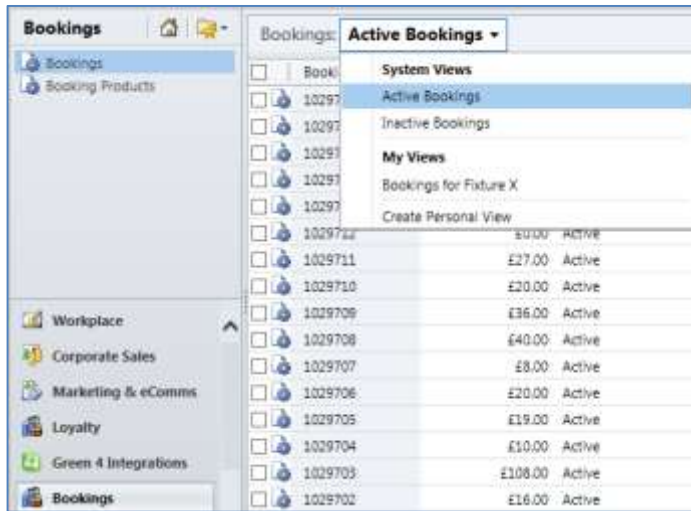
Once you have created an advanced find you can save the criteria for future use. For example if you create an advanced find to identify bookings for a particular fixture, you can save the search details, and then when you need to report on the next fixture, you can re-use the search once you have adjusted the fixture name.

To save an advanced find:

- With the search terms visible in the advanced find dialog, select **Save As** on the ribbon.
- Enter a name and description for the search. For example Bookings for Fixture x. Once the details are complete select **OK** to continue.
- The view will be listed on the **Used Saved View** drop-down list as shown below in Advanced Find:



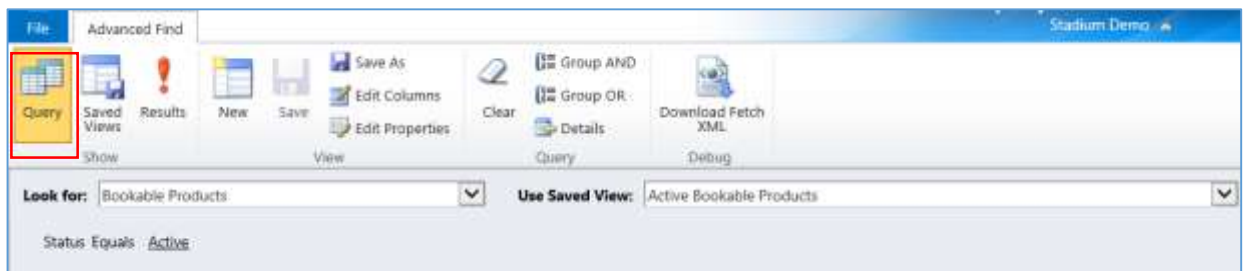
- The view will also be available when viewing lists of data outside of the Advanced Find dialog. For example:



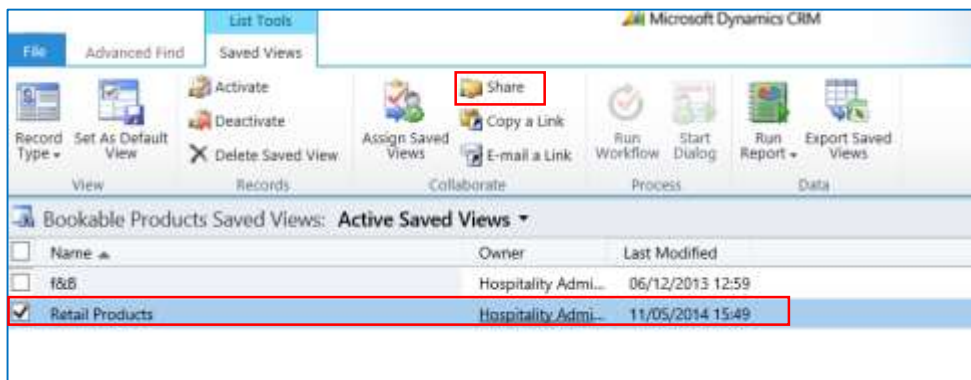
2.7. HOW TO SHARE THE VIEW

Once saving your advanced find results it is possible to share them with selected users. To do this:

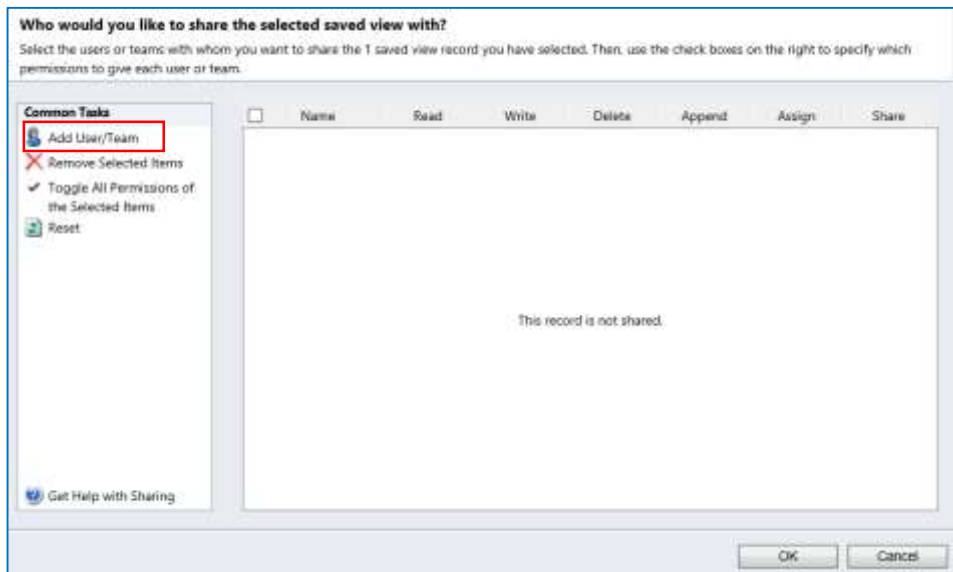
- Select **Advanced Find** in the ribbon. The Advanced Find form will be displayed.
- Select **Saved Views**, highlighted below, on the ribbon.



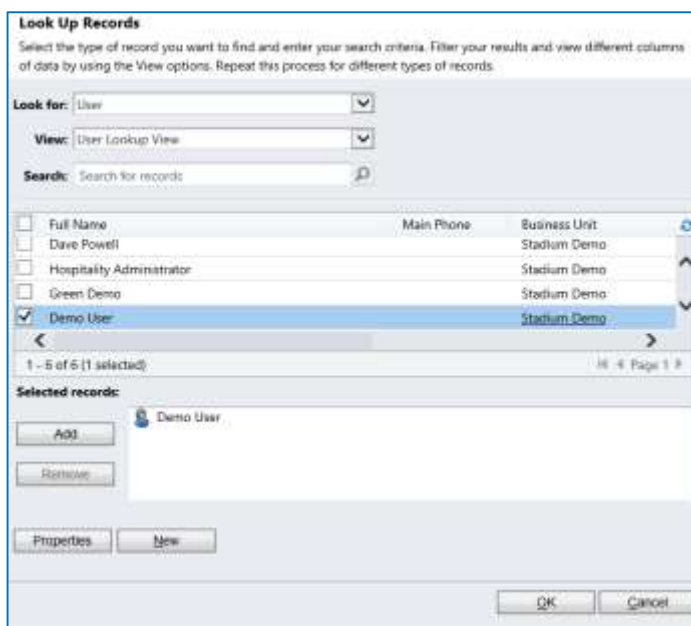
- A list of your previously saved Advanced Find results will be displayed.
- Select the saved view that you would like to share by placing a tick in the in the box placed next to it before selecting **Share** in the ribbon.



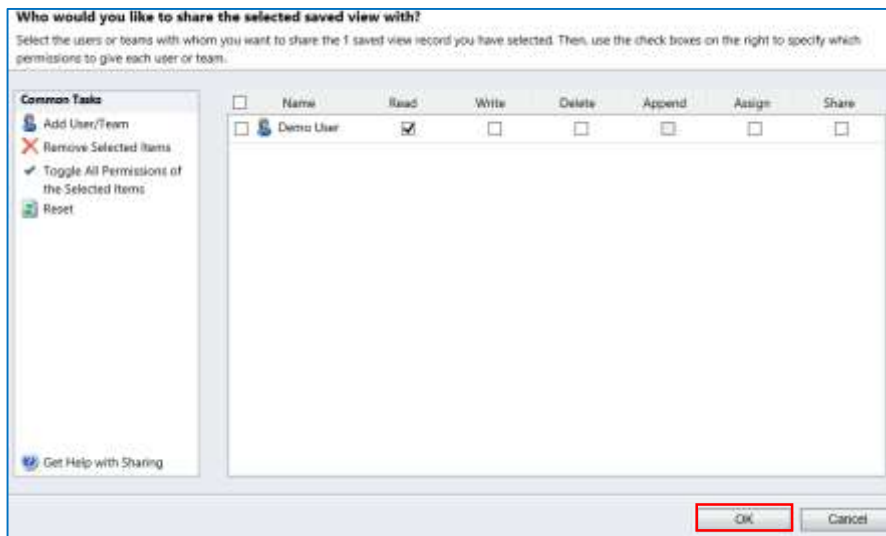
- e) A box entitled 'Who would you like to share the selected saved view with' will be displayed. In the **Common Task** bar, highlighted below, select **Add User/Team**.



- f) The Look Up Records dialogue box will appear listing the users who you are able to share this view with. Select the appropriate user by placing a tick next to their name and selecting **Add** or create a new user by selecting **New**. Upon choosing all of the users to share the view with, select **Ok**.



- g) The users you have selected to share the view with will appear in the 'who you would like to share the selected view with' form. Confirm these users by selecting **Ok**.



h) Your saved view will now be shared with the chosen users.

3. PRODUCT MANAGEMENT – PUTTING A PRODUCT ON SALE

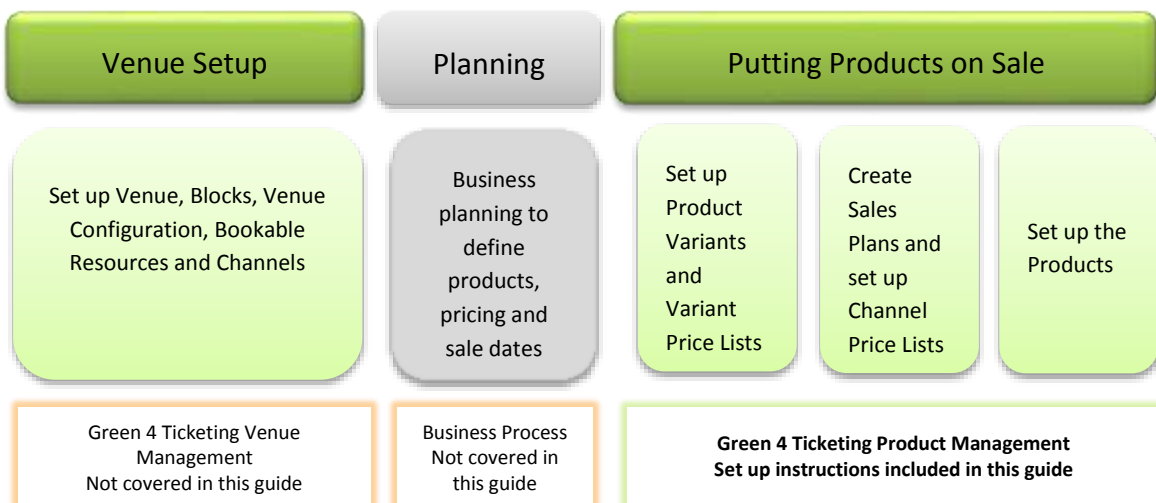
This section aims to guide you through the process of putting products on sale on one or more of your available sales channels. The product could be a Series, a Fixture or a Stock type product.



Note. This guide assumes that your infrastructure (channels, payment methods, etc.) and venue (venue configuration, blocks, etc.) are already in place.

3.1. OVERVIEW

To place a Fixture, Series or Stock type product on sale certain aspects of the system need to be set up. The order in which the steps are completed is not necessarily important, but the framework below shows the inter-dependency of the various entities in the Green 4 Ticketing system and what needs to be in place for a product to be put on sale. A glossary of terms has also been included to assist users in understanding the terminology of the system.



The table below contains a more detailed description of the elements of the framework above.

| Action | Stadium Setup | Planning | Product Variant Types and Variant Price List | Sales Plans and Pricing | Bookable Products, Series and Fixtures |
|-------------------------------|--|--|--|---|---|
| What needs to be done? | A prerequisite for putting a Series or Fixture on Sale is ensuring the Stadium / Venue and related entities have been set up | Define What products need to be put on sale and what they will be called Where do they need to be sold | Check all required Variant Types are set up and create a Variant Price List. | Set up Sales Plans and Channel Price Lists to manage the pricing and sales dates of your products (series, fixtures, stock, etc.) | Set up Bookable Products that relate to Bookable Resources Set up products as required e.g. Series, Fixtures, Stock, Auto- |

| Action | Stadium Setup | Planning | Product Variant Types and Variant Price List | Sales Plans and Pricing | Bookable Products, Series and Fixtures |
|---|---|--|--|--|---|
| | | <p>from e.g. POS, Web?</p> <p>The variants or types of product that will be sold e.g. Adult, Junior</p> <p>When the products need to go on sale</p> <p>Any special requirements in terms of sales and pricing e.g. early bird offers for season card holders</p> <p>Overall pricing strategy</p> | | | Scheduled, Scheduled, Memberships. |
| Where is this done? | Venue Management | Outside of the Green 4 System | Product Management | Product Management | Product Management |
| What needs to be set up in the system? | <ul style="list-style-type: none"> - Venue - Blocks - Venue Block Configuration - Areas - Seat Classes - Bookable Resources - Channels | Nothing at this stage | <p>Variations of the product to be put on sale e.g. Adult, Junior</p> <p>Variant Price Lists, created for pricing regimes.</p> | <p>Sales Plans</p> <p>Channel Price Lists. These need to be associated to a Sales Plan</p> | <ul style="list-style-type: none"> - Series - Fixtures - Stock Products - Memberships |
| Covered in this user guide? | The set-up of Venues, Blocks, the Venue Configuration, Bookable Resources and Channels is not covered in this guide | No – this relates to your internal business processes | Yes | Yes | Yes |

| Glossary of Terms | Meaning | Notes ¹ |
|---------------------|--|--|
| Venue Management | The area of the Green 4 Ticketing solution where the stadium or venue is set up. Blocks and zones are defined as well as seating in the stadium or venue | Not covered in this guide |
| Venue | The stadium or venue where the fixture or event will be held | Typically set up once and reused for different series, fixtures and events. However for Away fixtures a different venue will need to be created for each fixture. |
| Venue Configuration | Different configurations or ways in which the stadium or venue can be set up e.g. seats available for a concert could be different to those available for a football match | Typically set up once and reused for different events |
| Bookable Resources | The bookable resource is the item you are selling, for example the seats in the stadium. The bookable resource will be linked to the venue configuration and blocks in use via a venue configuration block | Typically set up once and reused for different fixtures and series Related to <ul style="list-style-type: none"> - Venue Configuration - Bookable Products |
| Channels | A sales channel is the route through which products are sold. Examples could include a web channel, ticket office channel, etc. | Typically set up once and reused for different fixtures and series Related to <ul style="list-style-type: none"> - Channel Price Lists - Payment Methods |
| Product Management | The area of Green 4 Ticketing where the different products that will be put on sale are set up as well as the pricing of these products | |
| Analysis Categories | Categories that can be defined to group different products together and display | Can be used for grouping Stock type products that are sold on |

¹ Only related entities that pertain to the product management functionality are included here

| | | |
|--------------------------|---|---|
| | a hierarchy of products for display on the sales channel | the POS and the Web. Also used for reporting purposes. |
| Bookable Products | The Bookable Product is used to represent the product that you are selling – for example a match ticket, a programme, a season ticket | <p>If the Bookable Product of type Series or Fixture, it will be linked to a bookable resource which will determine capacity and which seats are available when the product is purchased</p> <p>Related to</p> <ul style="list-style-type: none"> - Analysis Category - Bookable Resource - Series |
| Series | A series is used to represent a group of fixtures. This may be a season (football, rugby or cricket), or a multi-day match (cricket) | <p>Needs to be set up for each new series put on sale</p> <p>Related to</p> <ul style="list-style-type: none"> - Venue - Venue Configuration - Fixture - Sales Plan |
| Fixtures | A fixture is used to represent a match or event. For example a fixture could be used to represent a football or rugby match, a concert or a single day of a multi-day match (cricket) | <p>Typically set up each time there is a new match or event.</p> <p>Related to</p> <ul style="list-style-type: none"> - Venue - Venue Configuration - Series: A fixture has to be linked to a series in order to be on sale - Sales Plan |
| Stock Products | A stock product is set up to sell a specific item e.g. retail items such as shirts, shorts etc. | Set up each time there is a new product to be sold |
| Memberships | A product that includes access to specified activities or events. It is typically for a specified period | <p>Can be for set durations e.g. Annual, Monthly or Weekly</p> <p>Can include different products</p> |

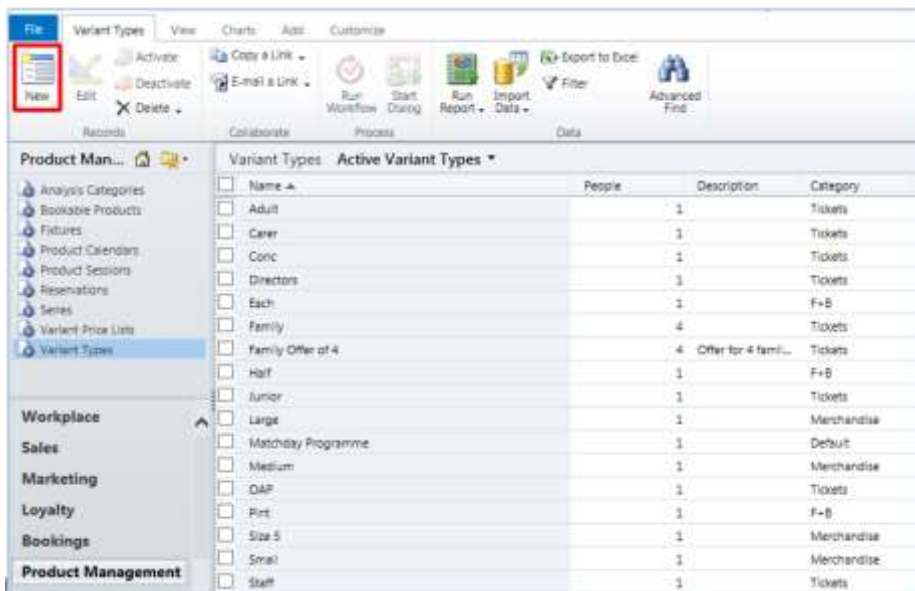
| | | |
|---------------------------|--|---|
| | | Can provide a specified discount to certain products |
| Sales Plans | Blanket facility to manage the dates, pricing, channels and entitlements for putting a Series, Fixture or any other product type on sale | <p>Can be reused, assists with the administration of managing Channel Price Lists and Sale Dates</p> <p>Related to</p> <ul style="list-style-type: none"> - Channel Price Lists - Series - Fixtures |
| Channel Price List | <p>The channel price list is used to manage the</p> <ul style="list-style-type: none"> - Channel a product is sold on - Variant price list to be used - On and Off Sale Dates and Hours before an event - Activity Start and End dates - Associated Marketing Lists - Quantities of a product that can be sold - Discounts that can be associated to products when sold - On/Off absolute Sale Dates for stock products. | <p>Can be reused</p> <p>Related to</p> <ul style="list-style-type: none"> - Sales Plan - Fixtures - Series - Other product types - Channel - Variant Price List - Entitlements |

3.2. VARIANT TYPES

Variant Type describes the type of Bookable Product you can purchase. For example Adult, Junior and Senior may be Variant Types for a ticket Bookable Product, whereas for a Shirt, the variants may be: Large, Medium and Small. Once Variant Types have been set up in the system, they can be used for different product types and do not need to be set up again. Where possible, it is recommended that you re-use Variant Types to define a product's variants. For example, Adult, Senior and Junior could be used for all fixture and series tickets and it is not necessary to create a set of variant types for each fixture or series product you add to the system. Before setting up a new Variant Type, check that it does not already exist.

To create a Variant Type record:

- a) In the CRM **Navigation Panel**, select **Product Management** followed by **Variant Types**.
- b) The Variant Types view will be displayed showing a list of all the Variant Types that meet the current view criteria.
- c) To add a new Variant Type, select **New** on the ribbon (highlighted in the figure below).



- d) A blank Variant Type form will be displayed, complete the following details:



- **Name.** Enter a name for the variant type.
- **Translated Name.** This field is used when the system is being translated into another language. Multiple translations can be added in the one field. [See the Set up for Multi Lingual using the Translation Field](#)
- **Description.** Enter a description of the variant type.
- **Skidata Class Code.** Used for access control.
- **Voucher Value.** Used for voucher variants.
- **Sequence.** Used to display a certain sequence of Variant Types.
- **People.** Enter the number of people included in the variant type. For example enter 4 if creating a “Family of 4” variant type. If more than one person is included in the variant type it will be necessary to create the appropriate Variant Type Component records (see [Variant Type Components](#) for details).
- **Category.** Used to group the variant types into categories for reporting purposes and for use in the price list editor. For example tickets, men clothing etc.



Note. All other fields in the Variant Types form that have not been described above do not need to be completed/changed.

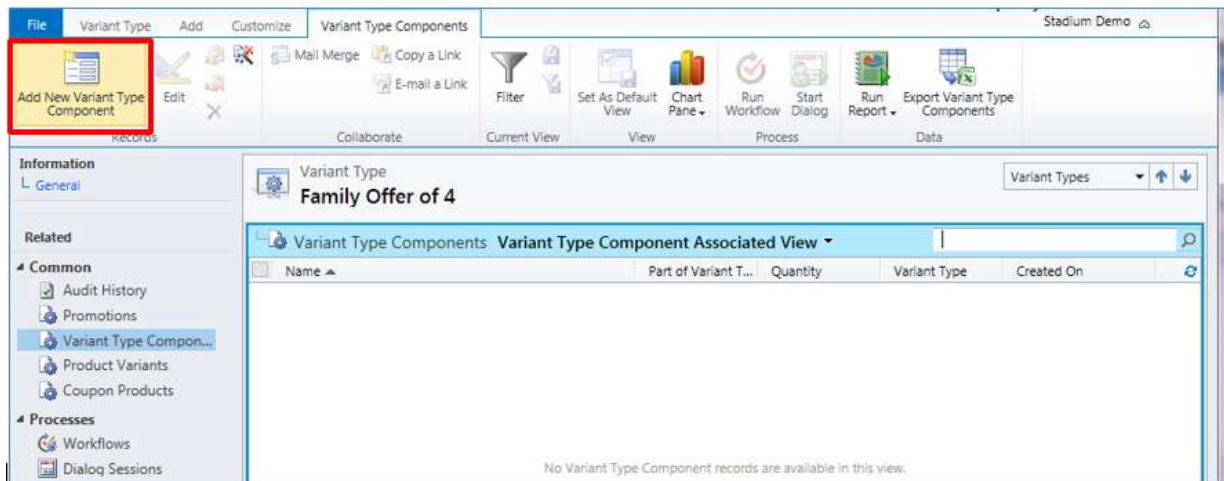
- e) Select **Save** on the ribbon to save the changes made.

VARIANT TYPE COMPONENTS

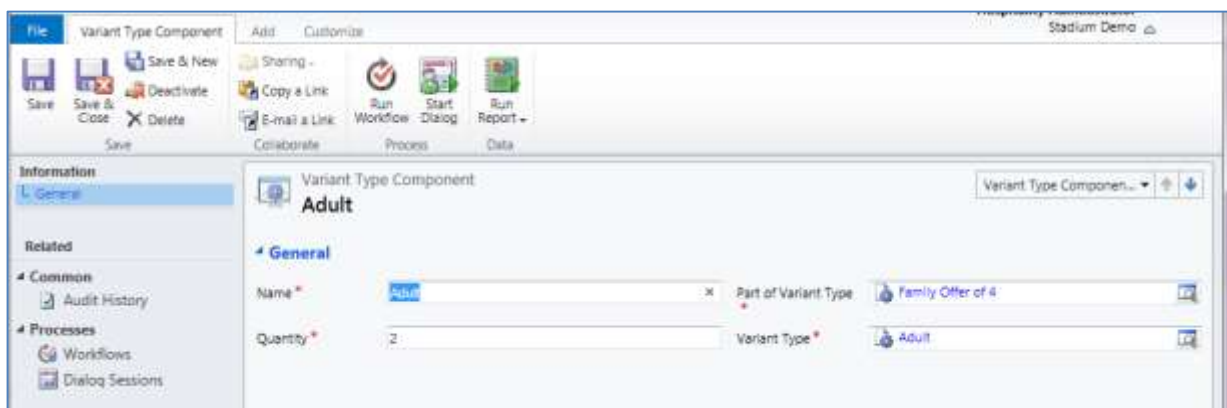
If a variant type includes more than one person, it is recommended to use the associated Variant Type Components entity to define the breakdown of the people included, for example the number of Adults and Juniors included on a family ticket. This will ensure that when tickets are printed the correct variants will be displayed on the ticket.

To create a Variant Type Components record:

- With the Variant Type open in the Variant Type form, select **Variant Type Components** in the form navigation panel.
- The Variant Type Components view will be displayed:



- d) Select **Add New Variant Type Component** on the ribbon (highlighted in the above figure).
- e) A blank Variant Type Component form will be displayed:

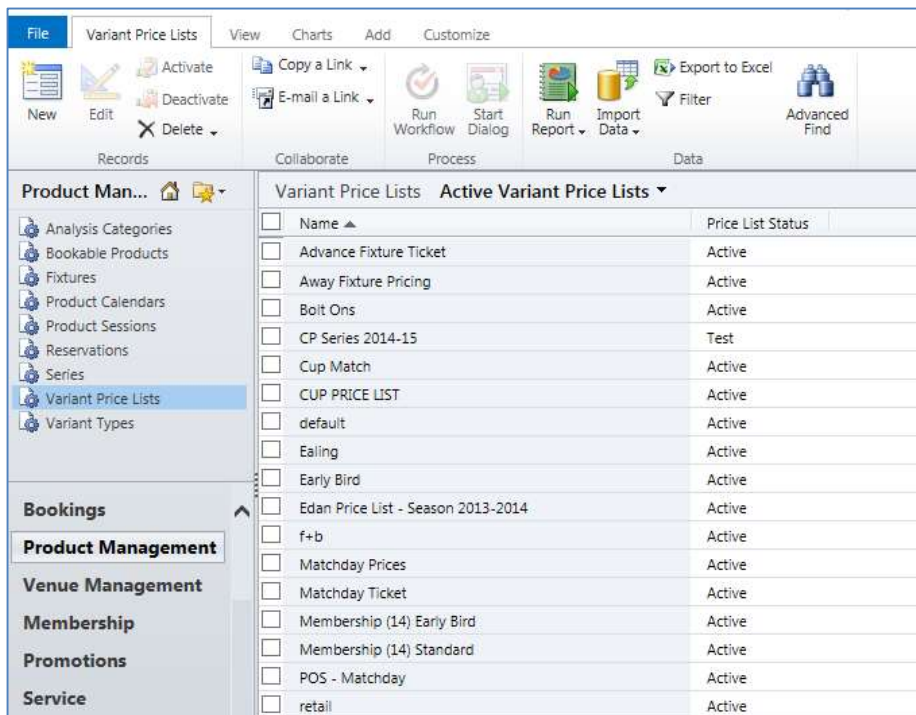


- f) Complete the following details:
 - **Name.** The name of the Variant Type Component, for example Adult.
 - **Quantity.** The number of people included in the Variant Type Component, e.g. 2 Adults for a family ticket.
 - **Part of Variant Type.** The name of the parent variant type will be displayed.
 - **Variant Type.** Select the variant type representing the component. For example Adult if defining the number of Adults included on a family ticket.
- g) Select **Save and Close** to continue.
- h) Repeat the above steps to create a new Variant Type Component record for each element included in the variant type, for example a component for Adults and a component for Juniors included on a family ticket.
- i) Once all Variant Type Components have been created, select **Save and Close** to continue.

3.3. VARIANT PRICE LISTS

A Variant Price List must be created as it is selected in the Variant and Pricing section of the Bookable Product form, this being 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. Separate Variant Price list will need to be created if for example a sports club offers early bird and standard season ticket sales, or if a leisure attraction offers various types of attractions such as general admission and special events. This is because for differing sets of prices a new Variant Price List will need creating.

- a) In the CRM **Navigation Panel** select **Product Management** followed by **Variant Price Lists**.
- b) The Variant Price List view will be displayed:



- c) If a suitable price list exists, double-click over the appropriate row in the list. Alternatively select **New** on the ribbon to create a new variant price list.
- d) The Variant Price List form will be displayed. If creating a new variant price list, enter the following details:
 - **Name.** Enter a name for the price list.
 - **Price List Status.** Select the price list status from the drop-down list. Only price lists with a status of **Active** will be used to provide pricing information in Green 4 Ticketing.
- e) Select **Save and Close** on the ribbon.

3.4. SALES PLANS

Sales Plan functionality has been included to assist with the management and administration of putting products on sale and have to be used for all product types. The setting up of a Sales Plan is mandatory and needs to be done in advance of putting fixtures, series or other products on sale. Different types of Sales Plans can be set up, these include, Fixtures, Series and Other. The type 'other' would be used for all other types of events or products being set up in the system e.g. stock, scheduled and unscheduled products.

Linked to Sales Plans are Channel Price Lists. Channel Price Lists link the Channel and Variant Price Lists together, for each Channel and Variant Price List combination a new Channel Price List must be created. Furthermore the Channel Price List controls when a Products goes on and off sale. The Channel Price List then links to the Bookable Product when the same Channel and Variant Price List are selected in the Channel and Variant as well as the Pricing section of a Bookable Product form. Furthermore Channel Price lists are where [Entitlements](#) are set up, this being the process to allow customers, who are contained in a Marketing List, to obtain a preferential price for a product.



The benefits the Sales Plan functionality offers is described below.

- Facilitates the set-up of a plan for selling specific occurrences e.g.
 - Seasonal events
 - Early bird specials
 - Discounts automatically applied to purchases members make
 - Early purchase offers for a specified audience
 - Limited product purchases for a specified audience

- Controls when a fixture, series or event goes on and off sale
- Is linked to channel price lists that define the number of days and/or hours before the start of an item going on sale and the number of days and/or hours before the end of that item going off sale. The number of days can be negative i.e. -1 day to leave an item on sale 1 day after the end date
- Reusability – Sales Plans can be set up and reused when new fixtures or events are put on sale



Note. The Sales Plan functionality has been developed to aid the setting up of Series and Fixtures, and effectively do away with the need to set up channel price lists against each Series and Fixture to govern changing pricing regimes over time.

As part of the upgrade to v3.6 a script is run to add default sales plans to the system – however this does not remove previously created channel price lists linked to existing fixtures or series. Once the sales plan structure has been put into place to govern the pricing it is necessary to deactivate any channel price lists that are linked to your fixtures or series to ensure there are no conflicts going forward.

3.5. PLACING A NEW FIXTURE ON SALE

Fixtures are not only used to place an individual sports game on sale, for example Leicester City vs Green 4 FC, but are also used when placing an event such as a music concert or other performance on sale. The flow below is the process of how it is possible to put a Fixture on sale.



The following section will assume that you have previously set up the following items:

- **Channels** – ensure that the **Show Stadium Options** has been set to **Yes** to show the options for Fixtures and Series on the POS home screen.
- **Venue, Venue Configuration and Bookable Resource.** See the Green 4 Venue Management User Guide.
- **Variant Types** ([Section 3.2](#)).
- **Variant Price List** ([Section 3.3](#)).

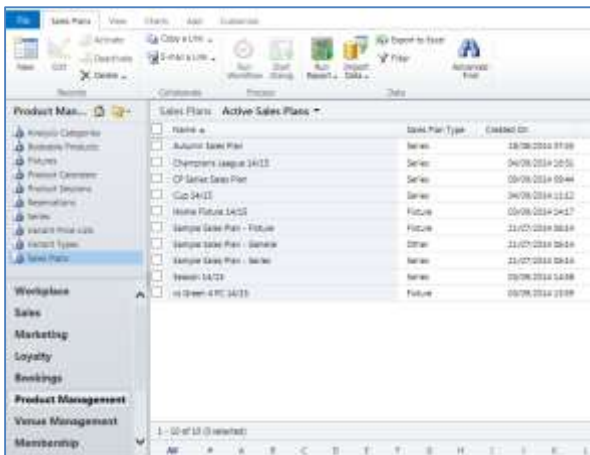
STEP 1: CREATE THE FIXTURE SALES PLANS



Sales Plan functionality has been included to assist with the management and administration of putting products on sale and have to be used for all product types. A fixture type Sales Plan, with a linked Channel Price List must be created in order to place a fixture on sale.

To set up a Sales Plan for a Fixture:

- a) In the CRM **Navigation Panel**, select **Product Management** followed by **Sales Plan**. A list of Sales Plans matching the view criteria will be displayed.



- b) To add a new Sales Plan, select **New** on the ribbon.



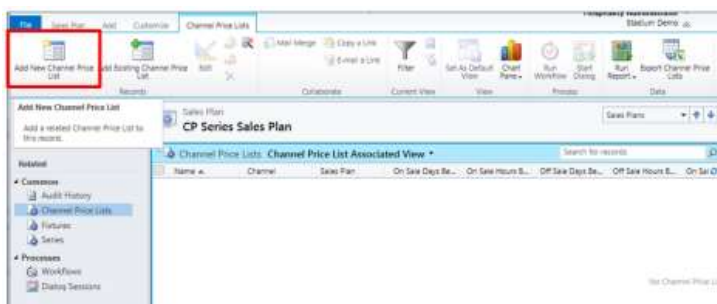
- c) Enter a name for the Sales Plan.
- d) From the drop down select the **Sales Plan Type** of **Fixture**.
- e) Select **Save** in the ribbon.
- f) From the Related Item menu, select the **Channel Price List** option.
- g) An existing Channel Price List can be linked to the Sales Plan or a New Channel Price List can be created.

STEP 2: CREATE THE FIXTURES CHANNEL PRICE LISTS

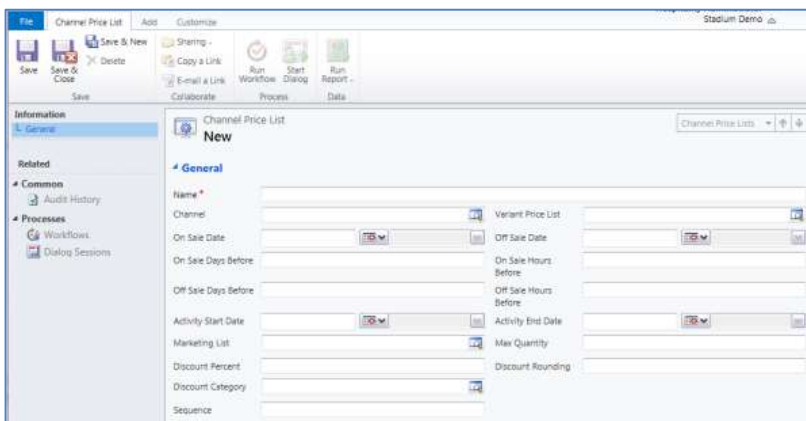


Channel Price Lists are used to link Variant Price List to a Channel as well as controlling when a product goes on and off sale. Channel Price Lists are connected to a Sales Plan, which in turn is linked to the relevant fixture record. Linked to a Sales Plan you may have multiple Channel Price Lists that allow the changing of the products on sale and the prices charged over time, see [Examples: Using Sales Plans to set up a Series and Fixtures](#) for more details.

- a) From the Navigation Area in the Sales Plan, select the **Channel Price List** option.
- b) To add a New Channel Price List for a Series or Fixtures select the **Add New Channel Price List** option on the ribbon.



- c) A blank Channel Price List form will be displayed. Complete the following details:



- **Name.** Enter a name for the Channel Price List. The name can be anything, but should be meaningful.
- **Channel.** Using the Look Up Records select the channel the price list applies to. A new Channel Price List must be set up for each channel you would like to sell the product on, for example POS and web.
- **On Sale Days Before.** Enter the number of days before the start of the fixture when the Channel Price List will come into use. This will apply for all fixtures linked to the Sales Plan. So for instance each fixture will come on sale in turn 30 days before the fixture date. For examples see the following section [Using Sales Plans to set up a Series and Fixtures](#).

- **Off Sale Days Before.** Enter the number of days before the end of the fixture when the Channel Price List will stop being in use. This will apply for all fixtures linked to the Sales Plan. So for instance each fixture will go off sale in turn 1 days before the fixture end date. For example if all fixture products are to be removed from sale on the web a day before the fixture enter 1. The value can be a negative number e.g. -1 to allow for ticket reconciliation on the POS channels after the fixture has passed. For examples see the following section [Using Sales Plans to set up a Series and Fixtures.](#)
- **Marketing List.** If the Channel Price List is only to be used for a subset of customers (e.g. Members, Season Ticket Holders, Corporate Customers, Etc.), select the Marketing List that defines the subset.
- **Discount Percent.** If using a discount, enter the discount that is to be applied when the Channel Price List is used. For example if setting up early bird season ticket pricing, rather than having two price lists in use (one for early bird pricing, one for standard pricing) you may apply a 20% discount across all prices included on the standard price list.
- **Discount Category.** If using a discount, use the lookup to select the product category the discount percent will be applied to. If a product category is not entered, the discount percent will be applied to all products.
- **Sequence.** Enter a sequence number if required. In the case of conflicts between channel price lists the sequence number will be used to determine which price list to use.
- **Variant Price List.** Use the Lookup Records dialog to select the appropriate price list. The price list you are to use when creating your bookable product must be used.
- **On Sale Hours Before.** Enter the number of hours before the start of the fixture when the Channel Price List will come into use. This will apply for all fixtures linked to the sales plan. So for instance each the price of fixture products will increase 3 hours before kick-off. For examples see the following section [Using Sales Plans to set up a Series and Fixtures.](#)
- **Off Sale Hours Before.** Enter the number of hours before the end of the fixture when the channel price list will stop being use. This will apply for all fixtures linked to the sales plan. So for instance each fixture products will go off sale 3 hours before kick-off. For examples see the following section [Using Sales Plans to set up a Series and Fixtures.](#)
- **Max Quantity.** Enter the maximum number of products the customer can purchase when the channel price list is in use.
- **Discount Rounding.** If using a discount, enter the discount rounding i.e. to the nearest penny, 10p, pound. If a value is not entered the system will default to rounding to a penny.



Note. All other fields in the Channel Price List form that have not been described above do not need to be completed/changed.

Note. A channel price list will need to be created for each Variant Price List – Channel combination created.

- d) Once the Channel Price List is complete select **Save and Close** in the ribbon. Many Channel Price Lists can be linked to a single Sales Plan, so therefore the above steps can be repeated for each Channel-Variant Price List that is to be available on your system.

STEP 3: CREATE THE FIXTURES



The Fixtures entity is used to add the details of individual fixtures that are to be made available for sale, for example the name, date and venue of the fixture. The Fixture Sales Plan that was previously created is also added to the Fixture form.

To create a new fixture complete the following:

- Select **Product Management** in the navigation bar followed by Fixtures.
- Select **New**.
- A blank fixture form will be displayed. Complete the following details:

- **Name.** Enter a name for the fixture, for example Leicester City vs Green 4 FC 14/15 or Concert – Take That. The name will be visible in the Green 4 Ticketing application and therefore should reflect the event accurately. It is recommended that you add the season date to the fixture name to distinguish between fixtures in different series.
- **Code.** Utilised for access control set up.
- **Start.** Enter the start date and time of the fixture. The start time will be used in conjunction with the Channel Price List to control pricing.
- **Description.** Enter a description of the fixture. The description will be visible to users of the Green 4 Ticketing application and therefore should reflect the event accurately.
- **Venue.** Use the lookup to select the venue used for the series. The venue should have been set up previously as part of your venue configuration.
- **Skidata Season Code.** Used for access control.

- **Credit Percent.** Used when a customer selects to upgrade or move a fixture ticket linked to the series. The credit percent represents how the value of the customer's season ticket against the value of the fixture product they are upgrading/moving to. This field can be left blank if upgrades and moves are not available on your system.
- **Select Seats.** Select **Yes** if the customer is to be allowed to select their own seats when using the Green 4 Ticketing web ticketing site.
- **End.** Enter the end date and time of the fixture. The start time will be used in conjunction with the Channel Price List to control pricing.
- **Venue Configuration.** Use the lookup to select the venue configuration used for the series. The venue configuration should have been set up previously as part of your venue configuration.
- **Fixture Sponsor.** Enter the name of the sponsor for the fixture. The fixture sponsor can be included on the ticket if the appropriate information is added to the print transform.
- **Sales Plan.** Use the Look Up to select an appropriate **Fixtures** Sales Plan. The Sales Plan Type chosen here should be a **Fixture Sales Plan** such as the one created in [Step 1](#)
- **Record Away Ticket Details.** Select **No**, this is used when setting up away tickets.



Note. All other fields in the Fixture form that have not been described above do not need to be completed/changed.

- Once the details are complete, select **Save & Close** on the ribbon.
- The Lookup Records dialog will be redisplayed showing the details of your fixture. Select the fixture and click **OK** to return to the series form.
- Repeat the above process for each new fixture that you wish to create.

Adding an Image to a Fixture

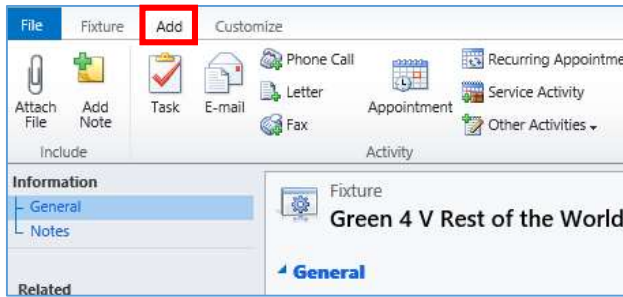
It is possible to add images, for example event logos or team emblems, to a fixture. If added these will be displayed on the website when customer's view the list of available fixtures. You can add two images to the fixture, one for the home team and one for the away team. The images used must be 100px x 100px and either a jpg or png file. The background of the images used should be either transparent or match the background colour of your ticketing website.



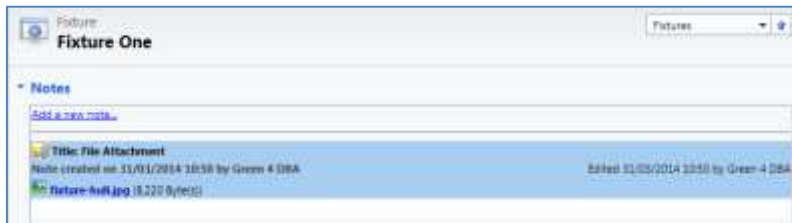
Note. The name of the attachment and note must match the configuration defined for your organisation's web site (or RSS site). If you encounter problems please contact your system administrator or the Green 4 support team.

To add a logo:

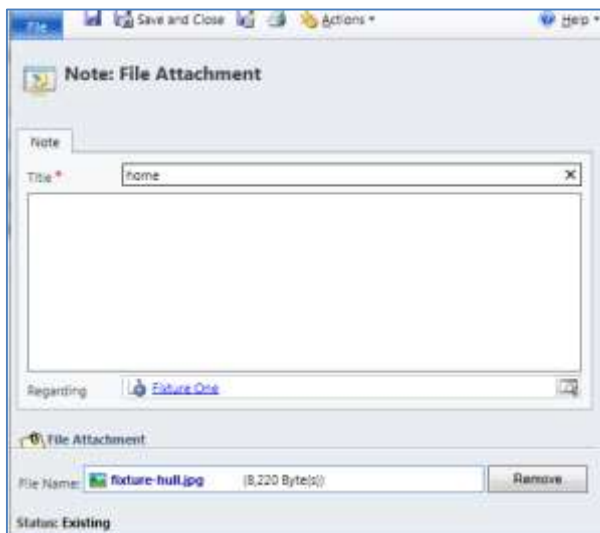
- With the fixture open in the form view, select the **Add** tab above the ribbon (highlighted below).



- b) Select **Attach File** on the ribbon.
- c) The Manage Attachment dialog will be displayed. Click **Browse** to search for the file, before clicking **Open**.
- d) The Manage Attachment dialog will be redisplayed. Select **Attach** to continue.
- e) The Notes section of the Fixture form will be displayed:



- f) Double-click over the note and update the **Title** to **home** for the home logo or **away** for the away logo. Once the details are correct, select **Save & Close** on the toolbar.



- g) Repeat the above process to upload a second image.

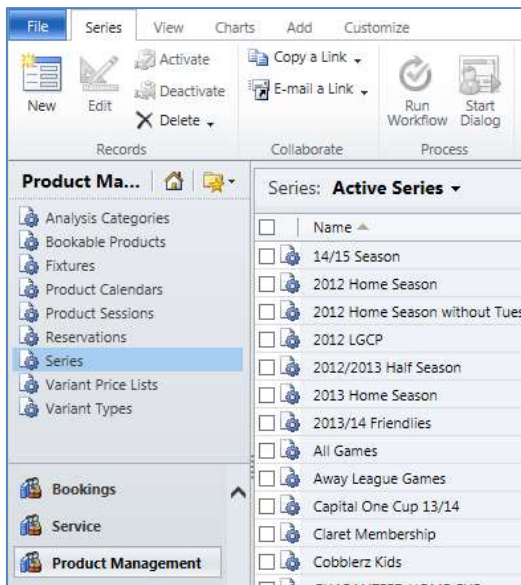
STEP 4: CREATE A SERIES AND ADD THE FIXTURES



The Series entity is used to represent a group of fixtures, for example a season, half season, multiday match ticket. Even if selling individual fixture tickets they must still be connected to a Series and therefore a Series must be created. A fixture can be included in more than one Series. For example a sports team’s fixture may be included in the club’s full season Series and half season Series. A fixture **must** be part of a Series to be available for sale.

To create a Series record:

- a) In CRM, select **Product Management** in the navigation bar before selecting **Series**.
- b) A list of currently active Series will be displayed, if a relevant Series does not already exist, select **New** on the ribbon or open up an existing Series.



- c) Ensure the following fields are completed in the Series form:

- **Name.** Enter a name for the series. For example Home Fixtures 14/15. The series name will be visible on your sales channels and potentially the tickets you print from the system.
- **Description.** Enter a description of the series. The series description will be visible on your sales channels.
- **Venue.** Use the lookup to select the venue used for the series. The venue should have been set up previously as part of your venue configuration.
- **Select Seats.** Select **Yes** if the purchaser is to be allowed to select their own seats when using the Internet sales site.
- **Series Start Date.** Enter the start date of the series. This will be used in conjunction with the sales plan to determine when series products go on sale.
- **Venue Configuration.** Use the lookup to select the venue configuration used for the series. The venue configuration should have been set up previously as part of your venue configuration. The venue configuration selected should be the most restricted with regards to the seats available.
- **Skidata Season Code.** Used for access control.
- **Series Sponsor.** Enter the name of the sponsor for the series. The sponsor can be printed onto your tickets if required.
- **Series End Date.** Enter the end date of the series. This will be used in conjunction with the sales plan to determine when series products goes off sale.



Note. All other fields in the Series form that have not been described above do not need to be completed/changed.

- d) Once the details are complete select **Save** on the ribbon, the Fixtures created in [Step 3](#) must now be added to the Series.

- e) With the Series open in the form view, select Fixtures in the form navigation area.



- f) Select **Add Existing Fixture** on the ribbon
g) The Look Up Records dialog will be displayed.



- h) Enter the name of the fixture into the **Search** for records field (highlighted above) before clicking the magnifying glass icon.
i) Any fixture records matching the search term entered will be listed in the results panel.
j) Select the checkbox alongside the fixtures to be linked to the series before clicking **Add**. The selected fixtures will be moved to the Selected Records panel.
k) Once the list of selected records is completed, click **OK** to continue.

- l) The Series form will be redisplayed with the selected fixtures listed.
- m) Select general in the Navigation Area before clicking **Save and Close** on the ribbon.

STEP 5: CREATE THE FIXTURE BOOKABLE PRODUCT

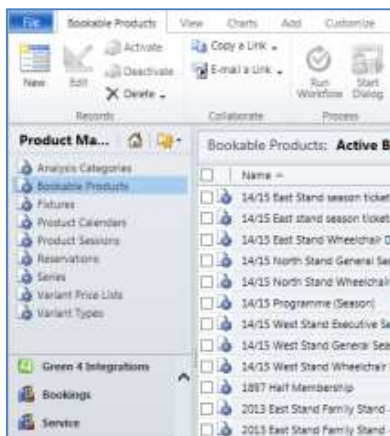


The Bookable Product entity is used to represent products that are sold through the Green 4 Ticketing application, for example the match ticket or concert ticket itself. For each product that you are selling through the system (i.e. a fixture) you must create a Bookable Product. A fixture type Bookable Product must be created for fixtures to be sold.

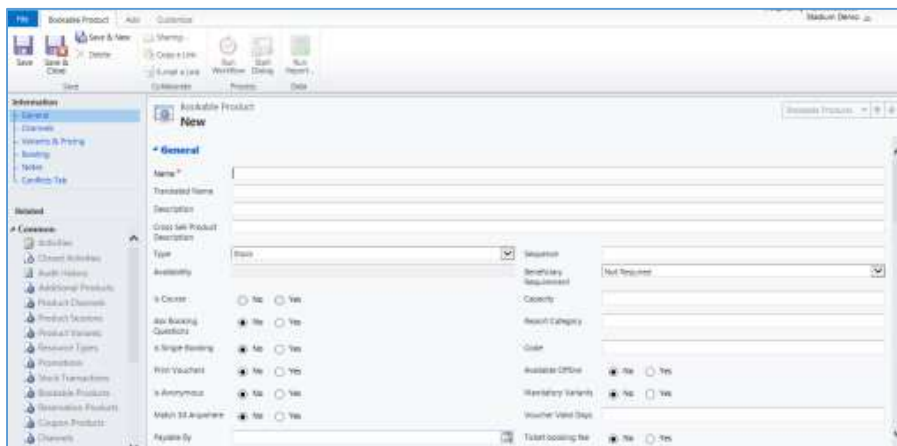
A fixture Bookable Product will be linked to a Bookable Resource, which in turn will determine which seats (or standing capacity) are available to the purchaser when the product is selected.

To create a Bookable Product:

- a) On the CRM navigation bar, select **Product Management** before choosing **Bookable Products**.
- b) A list of currently active Bookable Products will be displayed. Select **New** on the ribbon.



- c) A blank Bookable Product form will be displayed. Complete the following Product Details:



General:

- **Name.** Enter a name for the product. The name will be visible to customers, and should therefore reflect the nature of the product, for example Fixtures 14/15.
- **Translated Name.** Used for translated implementations. For more information [see the Set up for Multi Lingual using the Translation Field.](#)
- **Description.** Enter a description of the product. The Description field can be set as a translatable string if desired (if used in the Web UI). [See the Set up for Multi Lingual using the Translation and Description Field](#) for further information.
- **Type.** Use the drop-down list to select the **Type** this being a **Fixture**.
- **Is Anonymous.** Select **Yes** if the purchaser is not required to provide a name when buying the product. The channel must also be set to allow the sale of anonymous products.
- **Payable By.** If the product can be paid for using direct debit select the direct debit payment method.
- **VAT Code.** Use the lookup to select the correct tax code for the Bookable Products form.
- **External Product ID.** Can be used to link the Bookable Product to an external list of products.
- **Sequence.** Enter a sequence number for the product. The sequence number is used to determine the order in which products are displayed in the POS and Web channels.
- **Beneficiary Requirement.** Use the drop-down list to select if a customer's name is required when the product is purchased, for example the details of the ticket purchaser. Select from the following options:
 - i. **Not Required.** The customer will not be asked for their name and contact details.
 - ii. **Requested.** The customer will be asked for their name and contact details, but can skip this option if they do not wish to provide their details.
 - iii. **Required.** The customer must provide their name and contact details. This option should be selected when setting up a season ticket or membership product.
- **Report Category.** Used for reporting purposes to categorise the products sold through Green 4 Ticketing.
- **Code.** Utilised for Access Control set up.
- **Available Offline.** Select **Yes** if the Bookable Product is to be available for purchase through the offline POS. This option cannot be used for products that require capacity to be monitored.
- **Fixture Coupon Product.** If using a coupon, enter the **Fixture Coupon** which is to be used for the partial coupon if relevant.

Referring Entities:

- **Bookable Resource.** The bookable resource selected will determine which seats are available to the customer to purchase (for example, standard or hospitality). Select the Look Up icon alongside the field. The Look Up Records dialog will be displayed. Highlight and add the appropriate bookable resource. If the required bookable resource is not available contact your system administrator.
- **Series.** Use the Look Up tool to select the relevant series that was previously created in [Step 4](#).
- **Category.** Use the Look Up dialog to select the product category. The category is used to group products, for example into tickets, food, etc. The categories are used by the price list and channel editors.

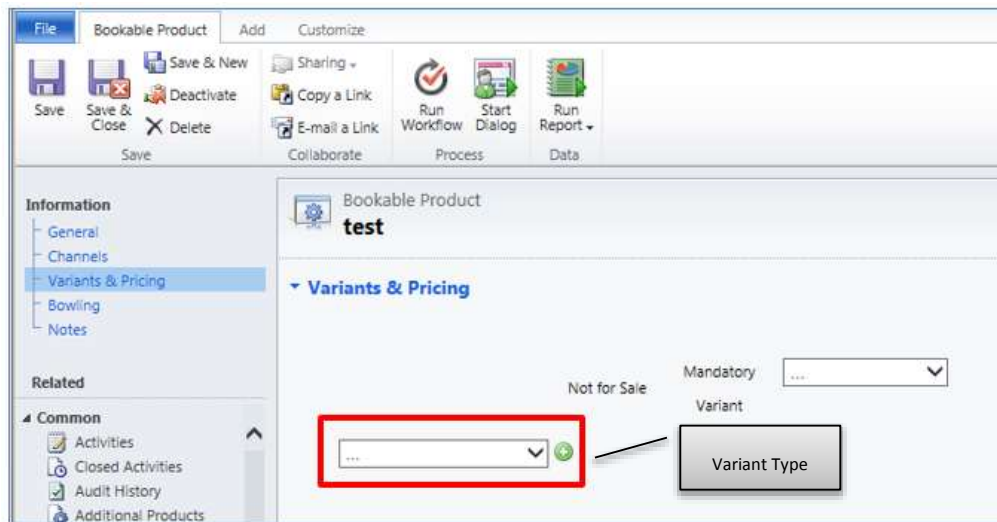
Delivery Options:

- **Print At Home.** Select Yes/No depending on if the product is available to print at home.
- **Requires Delivery.** Select Yes/No depending on if the product requires a delivery address when purchasing the product.



Note. All other fields in the Bookable Product form that have not been described above do not need to be completed/changed

- d) Once the details are complete select **Save** on the ribbon.
- e) Next, it is necessary to indicate which channels the product can be bought via. To set the Channels carry out the following:
 - Select **Channels** in the Form Navigation area.
 - The Channels that have been set up during the configuration on your system will be listed. Select the checkbox alongside each Channel through which the product will be sold, for example POS and Web.
 - Select **Save** on the ribbon.
- f) Next, it is necessary to identify the Product Variants and Prices:
 - Select **Variants & Pricing** in the Form Navigation area.
 - To select a variant, in the drop-down list on the left hand side (highlighted below), select the appropriate option. All of the variants available in your system will be listed. If you have categorised the variants they will displayed in the relevant categories.
 - Select the green cross alongside the variant name to add.

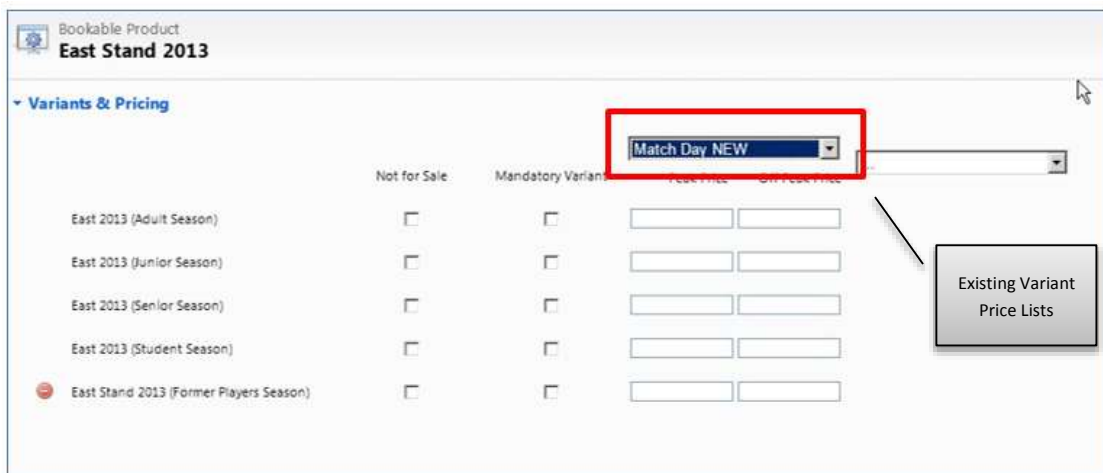


- Repeat until all variants are listed. If you need to remove a variant, click the red minus sign alongside the variant.



Note. Once a variant is sold it can then not be removed from the Variant and Pricing list. Therefore ensure the correct variants are set up for your product before you begin to sell them.

- To enter price information for the product, select the relevant Variant Price List from the drop down at the top of the Variants & Pricing section (highlighted below). A Channel Price List must have been created in [Step 2](#) that has both the Channels and Channel Price List selected here linked to it.



- Enter the pricing (peak and off peak) information for each of the variants that are to be included on the price list. The peak and off peak price should be the same.
- Repeat this process for each price list used to govern the pricing of the selected product.

g) Once the pricing details are complete select **Save & Close** on the ribbon to save the product.

FIXTURE TICKET ON SALE CHECK LIST

The following checklist can be used to ensure that you have completed all of the tasks required to place a Fixture on sale:

| Task | Completed? | Comments |
|---|------------|--|
| Created Fixture type Sales Plan | | Ensure the type of Sales Plan created here is Fixture. |
| Created Channel Price Lists | | The channel price list should link the channels to the variant price list. Ensure the On and Off Sale hours have been entered. |
| Created the fixtures | | Ensure the fixture Start and End date and time are correct. Ensure that a Venue and Venue Configuration have been entered. Add the Fixture type Sales Plan. Repeat the steps for each Fixture that needs creating. |
| Created a Series and add the Fixtures | | Ensure that a Venue and Venue Configuration have been entered. Add the Series start and end date. Add the Fixtures that have been created to the Series. |
| Created the Fixture Bookable Product | | Ensure the Bookable Product Type is Fixture. A Bookable Product must be linked to a Bookable Resource. In turn the Bookable Resource must be linked to the Venue configuration linked to the fixture. Ensure the Series that has the chosen fixtures linked to it is added into the Bookable Product Ensure a Category has been added to the Bookable Product |
| Assigned channels to the bookable product | | Ensure the relevant Channel check boxes are ticked. |
| Assigned variants to the bookable product | | Ensure the variants have been added. |
| Assigned prices to the bookable product | | Prices should be added to an active Variant Price List. |

3.6. PLACING A NEW SERIES ON SALE

The Series entity is used to represent a group of fixtures, for example a season, half season or multiday match ticket. The fixtures that are part of a Series must be added to the Series. For example if a Season Ticket is to be put on sale, then the individual fixtures that make up the games throughout the season must be added to the Season Ticket. It is also possible for fixtures to be included in more than one Series. For example a football fixture maybe included in the club’s full season series and half season series. The flow below is the process of how it is possible to place a Series on Sale.



The following section will assume that you have previously set up the following items:

- **Channels** – ensure that the **Show Stadium Options** has been set to **Yes** to show the options for Fixtures and Series on the Epos home screen.
- **Venue, Venue Configuration and Bookable Resource.** See the Green 4 Venue Management User Guide.
- **Variant Types** ([Section 3.2](#)).
- **Variant Price List** ([Section 3.3](#)).
- **Fixtures** - These should already have been created. See section 3.5; [Step 3: Create the Fixtures](#) for information on how to create new fixtures.

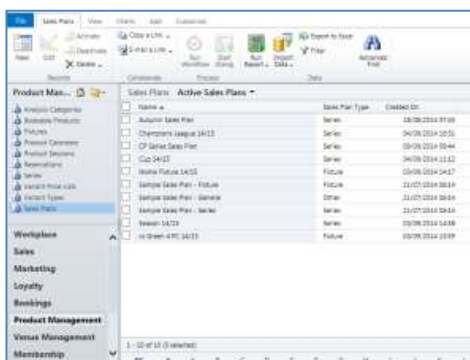
STEP 1: CREATE THE SERIES SALES PLANS



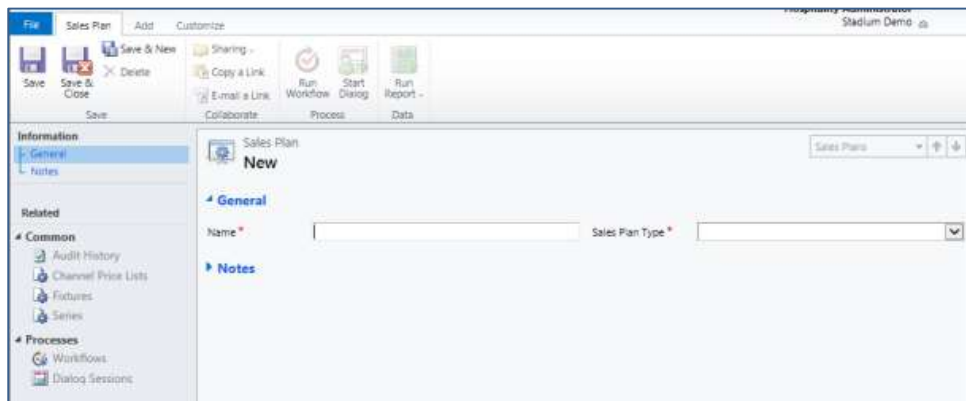
Sales Plan functionality has been included to assist with the management and administration of putting products on sale and have to be used for all product types. A Series type Sales Plan, with a linked Channel Price List must be created in order to place a Series on sale.

To set up a Sales Plan for a Series:

- In the CRM **Navigation Panel**, select **Product Management** followed by **Sales Plan**. A list of Sales Plans matching the view criteria will be displayed.



b) To add a new Sales Plan, select **New** on the ribbon.



c) Enter a name for the Sales Plan.

d) From the drop down select the **Sales Plan Type** of **Series**.

e) Select **Save** in the ribbon.

f) From the Navigation Area, select the **Channel Price List** option.

g) An existing Channel Price List can be linked to the Sales Plan or a New Channel Price List can be created. Many Channel Price Lists can be linked to a Sales Plan.

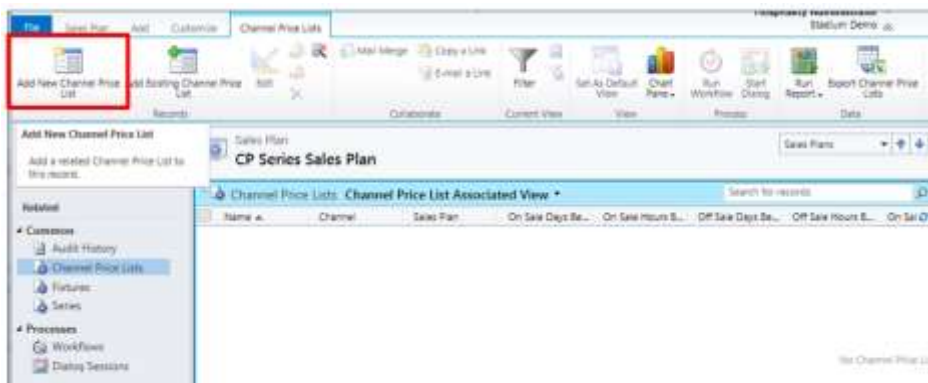
STEP 2: CREATE THE SERIES CHANNEL PRICE LISTS



Channel Price Lists are used to link Variant Price List to a Channel as well as controlling when a product goes on and off sale. Channel Price Lists are connected to a Sales Plan, which in turn is linked to the relevant Series record. Linked to a Sales Plan you may have multiple Channel Price Lists that allow the changing of the products on sale and the prices charged over time, see [Examples: Using Sales Plans to set up a Series and Fixtures](#) for more details.

a) From the Navigation Area in the Sales Plan, select the **Channel Price List** option.

b) To add a New Channel Price List for a Series or Fixtures select the **Add New Channel Price List** option on the ribbon.



c) A blank Channel Price List form will be displayed. Complete the following details:

- **Name.** Enter a name for the Channel Price List. The name can be anything, but should be meaningful.
- **Channel.** Using the Look Up Records select the channel the price list applies to. A new Channel Price List must be set up for each channel you would like to sell the product on, for example POS and web.
- **On Sale Days Before.** Enter the number of days before the start of the Series when the Channel Price List will come into use. This will apply for all Series linked to the Sales Plan. For examples see the following section [Using Sales Plans to set up a Series and Fixtures.](#)
- **Off Sale Days Before.** Enter the number of days before the end of Series when the Channel Price List will stop being in use. This will apply for all Series linked to the Sales Plan. For examples see the following section [Using Sales Plans to set up a Series and Fixtures.](#)
- **Marketing List.** If the Channel Price List is only to be used for a subset of customers (e.g. Members, Season Ticket Holders, Corporate Customers, Etc.), select the Marketing List that defines the subset.
- **Discount Percent.** If using a discount, enter the discount that is to be applied when the Channel Price List is used. For example if setting up early bird season ticket pricing, rather than having two price lists in use (one for early bird pricing, one for standard pricing) you may apply a 20% discount across all prices included on the standard price list.
- **Discount Category.** If using a discount, use the lookup to select the product category the discount percent will be applied to. If a product category is not entered, the discount percent will be applied to all products.
- **Sequence.** Enter a sequence number if required. In the case of conflicts between channel price lists the sequence number will be used to determine which price list to use.
- **Variant Price List.** Use the Lookup Records dialog to select the appropriate price list. The price list you are to use when creating your bookable product must be used.

- **On Sale Hours Before.** Enter the number of hours before the start of the Series when the Channel Price List will come into use. This will apply for all Series linked to the sales plan. For examples see the following section [Using Sales Plans to set up a Series and Fixtures.](#)
- **Off Sale Hours Before.** Enter the number of hours before the end of the Series when the channel price list will stop being use. This will apply for all Series linked to the sales plan. For examples see the following section [Using Sales Plans to set up a Series and Fixtures.](#)
- **Max Quantity.** Enter the maximum number of products the customer can purchase when the channel price list is in use.
- **Discount Rounding.** If using a discount, enter the discount rounding i.e. to the nearest penny, 10p, pound. If a value is not entered the system will default to rounding to a penny.



Note. All other fields in the Channel Price List form that have not been described above do not need to be completed/changed.

Note. A channel price list will need to be created for each Variant Price List – Channel combination created.

- e) Once the Channel Price List is complete select **Save and Close** in the ribbon. Many Channel Price Lists can be linked to a singal Sales Plan, so therefore the above steps can be repeated for each Channel-Variant Price List that is to be available on your system.

STEP 3: CREATE THE SERIES



The series entity is used to represent a group of fixtures, for example a season, half season or multiday match ticket. The fixtures that are part of a Series must be added to the Series. For example if a Season Ticket is to be put on sale, then the individual fixtures that make up the games throughout the season must be added to the Season Ticket. It is also possible for fixtures to be included in more than one series. For example a football fixture maybe included in the club’s full season series and half season series.

Placing an Existing Series on Sale



Note. If fixtures have already been placed on sale individually and they are therefore part of an existing Series as is demonstrated in [Section 3.6 Placing a new Fixture on sale](#), then it is possible to put this existing Series on sale without having to create a new Series form.

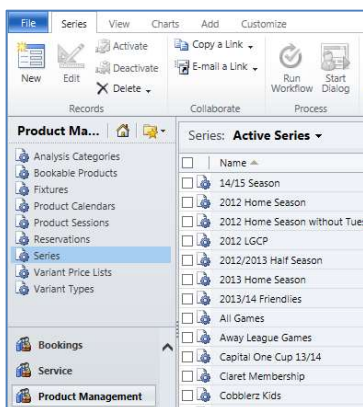
To do this a Series Sales Plan created in [Steps 1](#) with a linked Channel Price List ([Steps 2](#)) will need adding to the existing Series form.

Therefore to place an existing Series on sale which has fixtures already linked to it, ensure the following has been completed:

- I. In CRM, select **Series** on the **Product Management** tab, find and open the existing Series form.
- II. Ensure that the field entitled **Sales Plan** has a **Series type Sales Plan** attached to it via the Look Up.
- III. Upon adding the Series type Sales Plan, select **Save and Close** on the ribbon.
- IV. A Series type Bookable Product must now be completed where the cost of the Series and Channels it will be available on will be set up. Skip to [Step 5](#) for instructions on how to complete this form.

To create and place a new Series on sale:

- a) In CRM, select **Series** on the **Product Management** tab.



- b) A list of active Series will be displayed. Select **New** on the ribbon.
- c) A blank series form will be displayed. Complete the following fields:

- **Name.** Enter a name for the series. For example Season Ticket 14/15. The series name will be visible on your sales channels and potentially the tickets you print from the system.
- **Description.** Enter a description of the series. The series description will be visible on your sales channels.
- **Venue.** Use the lookup to select the venue used for the series. The venue should have been set up previously as part of your venue configuration.
- **Select Seats.** Select **Yes** if the purchaser is to be allowed to select their own seats when using the Green 4 Ticketing Internet sales site.
- **Series Start Date.** Enter the start date of the series. This will be used in conjunction with the sales plan to determine when series products go on sale.
- **Sales Plan.** Use the look up to select the appropriate **Series** Sales Plan. The Sales Plan Type chosen here should be a **Series** Sales Plan, such as the one created in [Step 1](#).
- **Venue Configuration.** Use the lookup to select the Venue Configuration used for the series. The venue configuration should have been set up previously as part of your venue configuration. The venue configuration selected should be the most restricted with regards to the seats available.



Note. When creating a series the Venue configuration that has the most restrictions should be used. For example a club may use a Venue Configuration to move the segregation of home and away fans depending on away ticket sales. When selling a series the Venue Configuration with the largest Away fan area should be used. This will prevent any home fans ending up in the Away fans area.

- **Skidata Season Code.** Used for access control.
- **Series Sponsor.** Enter the name of the sponsor for the series. The sponsor can be printed onto your tickets if required.

- **Series End Date.** Enter the end date of the series. This will be used in conjunction with the sales plan to determine when series products goes off sale.

d) Once the details are complete select **Save** on the ribbon.

STEP 4: ADD THE FIXTURES TO THE SERIES

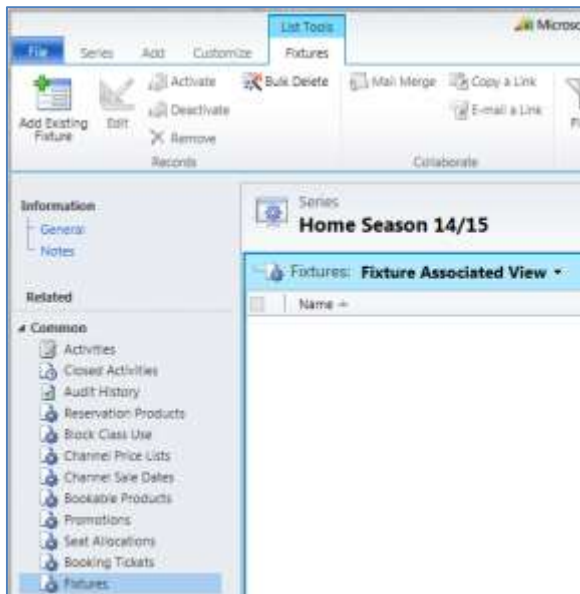


The Fixtures entity is used to add the details of individual fixtures that are included in the Series. If at the time of setting up the Series you do not know the fixtures that will be included, for example if you are setting up a new season ahead of the fixtures being released, this step can be skipped. Fixtures can be added once the details have been released. However, it should be remembered that in order for a fixture to be placed on sale, it must be included in at least one Series.

If no fixtures have currently been created they can be set up by following the instructions in section 3.5; [Step 3: Create the Fixtures.](#)

To add fixture to your Series carry out the following:

- a) With the Series open in the form view, select **Fixtures** in the form navigation area.



- b) Select **Add Existing Fixture** on the ribbon.
 c) The Lookup Records dialog will be displayed.

Look for: Fixture
View: Fixture Lookup View
Search: Search for records

| Name | Select Seats | Start | End |
|----------------------------------|--------------|------------------|-----|
| Green4 FC v Featherstone FC | Yes | 11/08/2012 15:00 | 11/ |
| Green4 FC v Warrington Wanderers | Yes | 12/07/2012 15:00 | 12/ |
| League 1 | Yes | 01/02/2013 00:00 | 01/ |
| League 2 | Yes | 02/02/2013 00:00 | 02/ |
| League 3 | Yes | 03/02/2013 00:00 | 03/ |
| League 4 | Yes | 04/02/2013 00:00 | 04/ |
| League 5 | Yes | 05/02/2013 00:00 | 05/ |

1 - 12 of 12 (5 selected) Page 1

Selected records:
Add League 1 League 2 League 3 League 4 League 5
Remove
Properties New
OK Cancel

- d) Enter the name of the fixture into the **Search for Records** field (highlighted above) before clicking the magnifying glass icon.
- e) Any fixture records matching the search term entered will be listed in the results panel.
- f) Select the checkbox alongside the fixtures to be linked to the series before clicking **Add**. The selected fixtures will be moved to the **Selected Records** panel.
- g) Once the list of selected records is completed, click **OK** to continue.
- h) The Series form will be redisplayed with the selected fixtures listed.



Note. When moving an existing fixture you must be cautious in case you get the double selling of seats. For example, a fixture has been sold as part of one series, then moved into a series that is already on sale and the seat has gone. Therefore if a fixture exists it must be added to the series that goes on sale.

STEP 5: CREATE THE SERIES BOOKABLE PRODUCT

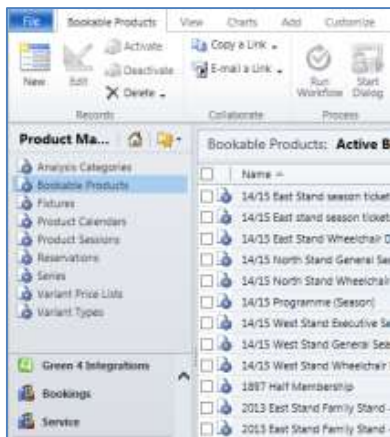


The Bookable Product entity is used to represent products that are sold through the Green 4 Ticketing application, for example a Season Ticket. For each product that you are selling through the system (i.e. a Series) you must create a Bookable Product. A Series type Bookable Product must be created for a Series to be sold

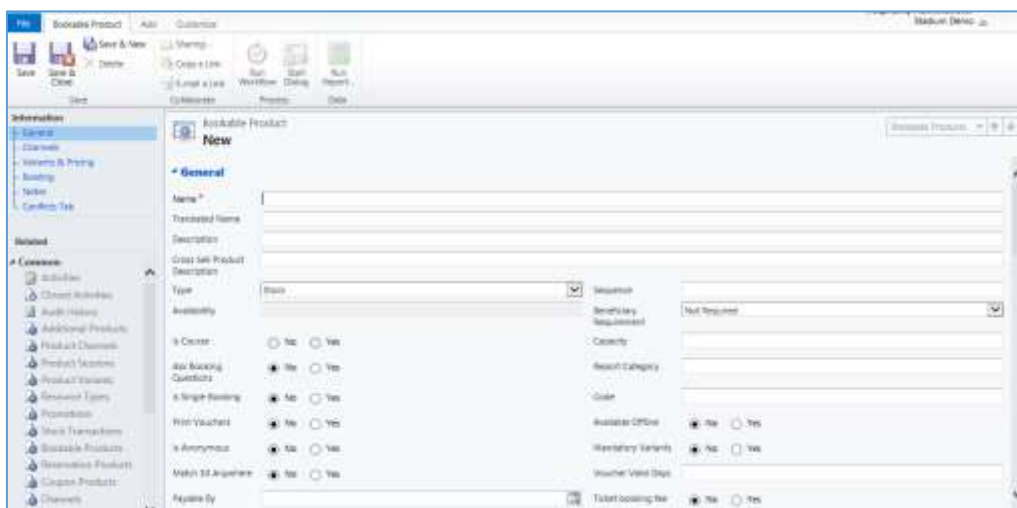
A Series Bookable Product will be linked to a Bookable Resource, which in turn will determine which seats (or standing capacity) available to the purchaser when the product is selected.

To create a Series Bookable Product:

- a) On the CRM navigation panel, select **Bookable Products** on the **Product Management** tab.
- b) A list of active Bookable Products will be displayed. Select **New** on the ribbon.



- c) A blank Bookable Product form will be displayed. Complete the following Product Details:



General:

- **Name.** Enter a name for the product. The name will be visible to customers, and should therefore reflect the nature of the product. For example Standard Season Ticket 14/15
- **Translated Name.** Used for translated implementations. For more information [see the Set up for Multi Lingual using the Translation Field.](#)
- **Description.** Enter a description of the product. The Description field can be set as a translatable string if desired (if used in the Web UI). [See the Set up for Multi Lingual using the Translation and Description Field](#) for further information.
- **Type.** Use the drop-down list to select the **type** of product, this being a **Series**.
- **Is Anonymous.** Select **Yes** if the purchaser is not required to provide a name when buying the product. The channel must also be set to allow the sale of anonymous products.
- **Match Sit Anywhere.** Used for when a customer requests a fixture ticket purchased as part of a series to be reprinted.
- **Payable By.** If the product can be paid for using direct debit select the direct debit payment method.
- **VAT Code.** Use the lookup to select the correct tax code for the Bookable Products form.
- **External Product ID.** Can be used to link the Bookable Product to an external list of products.
- **Sequence.** Enter a sequence number for the product. The sequence number is used to determine the order in which products are displayed in the POS and Web channels.
- **Beneficiary Requirement.** Use the drop-down list to select if a customer's name is required when the product is purchased, for example the details of the season ticket holder. Select from the following options:
 - i. **Not Required.** The customer will not be asked for their name and contact details.
 - ii. **Requested.** The customer will be asked for their name and contact details, but can skip this option if they do not wish to provide their details.
 - iii. **Required.** The customer must provide their name and contact details. This option should be selected when setting up a season ticket or membership product.
- **Report Category.** Used for reporting purposes to categorise the products sold through Green 4 Ticketing.
- **Code.** Utilised for Access Control set up.
- **Available Offline.** Select **Yes** if the Bookable Product is to be available for purchase through the offline POS. This option cannot be used for products that require capacity to be monitored.

Referring Entities:

- **Bookable Resource.** The Bookable Resource selected will determine which seats are available to the customer to purchase (for example, standard or hospitality). Select the Look Up icon alongside the field. The Look Up Records dialog will be displayed. Highlight and add the appropriate Bookable Resource. If the required bookable resource is not available contact your system administrator.
- **Series.** Use the Look Up tool to select the relevant Series that was previously created in [step 3](#)
- **Category.** Use the Look Up dialog to select the product category. The category is used to group products, for example into tickets, food, etc. The categories are used by the price list and channel editors.

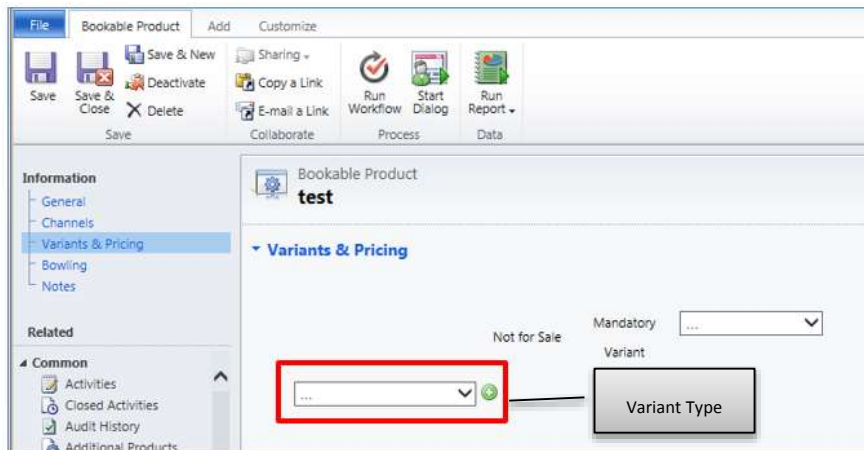
Delivery Options:

- **Print At Home.** Select Yes/No depending on if the product is available to print at home.
- **Requires Delivery.** Select Yes/No depending on if the product requires a delivery address when purchasing the product.



Note. All other fields in the Bookable Product form that have not been described above do not need to be completed/changed

- d) Once the details are complete select **Save** on the ribbon.
- e) Next, it is necessary to indicate which channels the product can be bought via. To set the Channels carry out the following:
 - Select **Channels** in the Form Navigation area.
 - The channels that have been set up during the configuration on your system will be listed. Select the checkbox alongside each channel through which the product will be sold, for example POS and Web.
 - Select **Save** on the ribbon.
- f) Next, it is necessary to identify the Product Variants and Prices:
 - Select **Variants & Pricing** in the Form Navigation area.
 - To select a variant, in the drop-down list on the left hand side (highlighted below), select the appropriate option. All of the variants available in your system will be listed. If you have categorised the variants they will displayed in the relevant categories.
 - Select the green cross alongside the variant name to add.

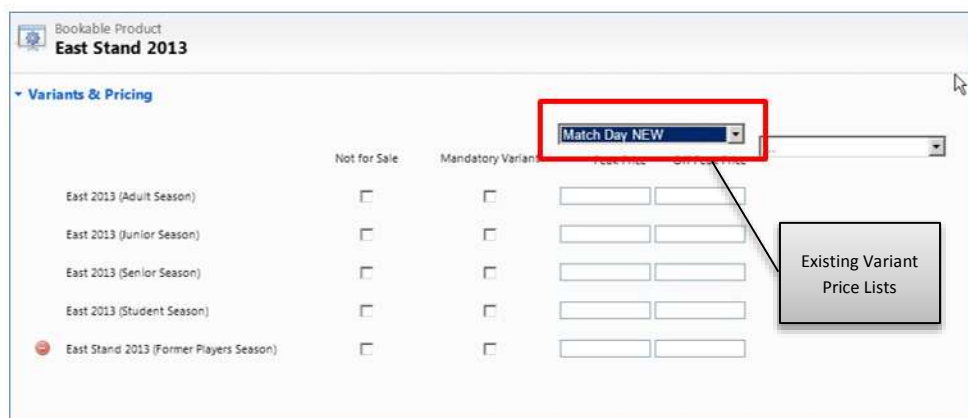


- Repeat until all variants are listed. If you need to remove a variant, click the red minus sign alongside the variant.



Note. Once a variant is sold it can then not be removed from the Variant and Pricing list. Therefore ensure the correct variants are set up for your product before you begin to sell them.

- To enter price information for the product, select the relevant Variant Price List from the drop down at the top of the Variants & Pricing section (highlighted below). A Channel Price List must have been created in [Step 2](#) that has both the Channels and Channel Price List selected here linked to it.



- Enter the pricing (peak and off peak) information for each of the variants that are to be included on the price list. The peak and off peak price should be the same.
- Repeat this process for each price list used to govern the pricing of the selected product.

g) Once the pricing details are complete select **Save & Close** on the ribbon to save the product.

SERIES ON SALE CHECK LIST

The following checklist can be used to ensure that you have completed all of the tasks required to place a Series on sale:

| Task | Completed? | Comments |
|---|------------|---|
| Created Series type Sales Plan | | Ensure the type of Sales Plan created here is Fixture. |
| Created Channel Price Lists | | The channel price list should link the channels to the variant price list. Ensure the On and Off Sale hours have been entered. |
| Created the Series | | Ensure that a Venue and Venue Configuration have been entered. Add the Series start and end date. Add the Series type Sales Plan. |
| Added the Fixtures to the Series | | Add all of the fixtures that are to be associated to the Series to it |
| Created a Series Bookable Product | | Ensure the Bookable Product Type is Series. A Bookable Product must be linked to a Bookable Resource. In turn the Bookable Resource must be linked to the Venue configuration linked to the fixture. Ensure the Series that has the chosen fixtures linked to it is added into the Bookable Product Ensure a Category has been added to the Bookable Product |
| Assigned channels to the bookable product | | Ensure the relevant channel check boxes are ticked. |
| Assigned variants to the bookable product | | Ensure the variants are added. |
| Assigned prices to the bookable product | | Prices should be added to an active Variant Price List. |

EXAMPLES: USING SALES PLANS TO SET UP A SERIES AND FIXTURES

The examples included below cover the common scenarios we are likely to encounter in a sports environment.

Pricing Regimes For Home Fixtures– Example 1

The following example illustrates how to set up the following pricing regime for home fixtures:

- A product is removed from sale a week before the fixture. E.g. An extra product Lunch may have been included but is removed closer to the event.
- An event is removed from sale via the web the day before the event.
- Prices increase on event day 3 hours before the fixture.

All events can be linked to use the same sales plan, providing they have the same pricing structure and regime.

Prior to creating the sales plan the following must be set up:

- Variant Price Lists:
 - Standard Pricing including the product that is removed a week before the game
 - Standard Pricing excluding the product that is removed a week before the game
 - Matchday pricing
- Channels:
 - Web
 - POS
- Series – current season
- Fixture – at least one fixture linked to the current series
- Bookable Product – at least two fixture type products with variants and channels set. This should be linked to the current series.

To set up the desired pricing regime carry out the following:

1. Open the fixture details. Click the lookup button alongside the Sales Plan field. The lookup records dialog will be displayed. Select **New**.
2. A blank sales plan form will be displayed. Complete the following details:
 - a. **Name.** Enter a name for the sales plan. For example Home Fixture 14/15.
 - b. **Sales Plan Type.** Select **Fixture** from the drop-down list.
3. Select **Save** on the ribbon.
4. Next create the channel price lists linked to the sales plan. You will need to create a channel price list for each channel – variant price list combination. Therefore in this example you will need to create the following channel price lists:
 - a. POS - Standard Pricing (Including extra product e.g. Lunch)

- b. POS – Standard Pricing (Excluding extra product)
 - c. POS – Event day
 - d. Web - Standard Pricing
5. For the price lists to come into force at the correct times, it is important to set the relative on/off sale dates as follows:

| Channel Price List | On Sale Days | On Sale Hours | Off Sale Days | Off Sale Hours |
|---------------------------------------|--|----------------------------------|---|--|
| POS - Standard Pricing (Incl Product) | 365 (on sale immediately) | | 7 (taken off sale 7 days before the event) | |
| POS - Standard Pricing (Excl Product) | 7 (on sale 7 days before the event) | | | 5 (off sale 5 hours after - assume fixture is 2 hours long) |
| POS – Event day | | 3 (match day pricing applied) | -1 (taken off sale one day after the event in case of returns) | |
| Web - Standard Pricing | 21 (on sale 21 days before the event) | | 1 (taken off sale 1 day before the event) | |

- 6. Once the channel price lists are set up select **Save & Close** on the Sales Plan ribbon.
- 7. The Lookup Records dialog will be displayed. Select **OK** to continue.
- 8. As you add fixtures to the existing series, providing the fixture is linked to the existing sales plan, the pricing regime set up for the initial fixture will be followed for all fixtures. So in the example above the day before each fixture web sales for the fixture will stop.

Season Ticket Pricing Using Sales Plans – Example 1

The following example illustrates how to set up the following pricing regime for season ticket sales:

- Season tickets are offered at a reduced rate when purchased two months before the season starts. The price charged for early bird tickets is determine by a secondary price list rather than a percentage reduction.

Prior to creating the sales plan the following must be set up:

- Variant Price Lists:
 - Early bird pricing
 - Standard pricing
- Channels:
 - Web
 - POS
- Series – current season
- Bookable Product – at least one series type product with variants and channels set. This should be linked to the current series.

To set up the desired pricing regime carry out the following:

1. Open the series details. Click the lookup button alongside the Sales Plan field. The lookup records dialog will be displayed. Select **New**.
2. A blank sales plan form will be displayed. Complete the following details:
 - a. **Name**. Enter a name for the sales plan. For example Season 14/15.
 - b. **Sales Plan Type**. Select **Series** from the drop-down list.
3. Select **Save** on the ribbon.
4. Next create the channel price lists linked to the sales plan. You will need to create a channel price list for each channel – variant price list combination. Therefore in this example you will need to create the following channel price lists:
 - a. POS – Early Bird
 - b. POS - Standard Pricing
 - c. Web – Early Bird
 - d. Web - Standard Pricing
5. For the price lists to come into force at the correct times, it is important to set the relative on/off sale dates as follows:

| Channel Price List | On Sale Days | On Sale Hours | Off Sale Days | Off Sale Hours |
|------------------------|--------------|---------------|---------------|----------------|
| POS – Early Bird | 90 | | 60 | |
| POS - Standard Pricing | 60 | | -100 | |

| Channel Price List | On Sale Days | On Sale Hours | Off Sale Days | Off Sale Hours |
|------------------------|--------------|---------------|---------------|----------------|
| Web – Early Bird | 90 | | 60 | |
| Web - Standard Pricing | 60 | | -100 | |

6. Once the channel price lists are set up select **Save & Close** on the Sales Plan ribbon.
7. The Lookup Records dialog will be displayed. Select **OK** to continue.

Season Ticket Pricing Using Sales Plans – Example 2

The following example illustrates how to set up the following pricing regime for season ticket sales:

- Season tickets are offered at a reduced rate when purchased two months before the season starts. Early bird season tickets are offered at a discounted rate (20% discount).

Prior to creating the sales plan the following must be set up:

- Variant Price Lists:
 - Standard pricing
- Channels:
 - Web
 - POS
- Series – current season
- Bookable Product – at least one series type product with variants and channels set. This should be linked to the current series.

To set up the desired pricing regime carry out the following:

1. Open the series details. Click the lookup button alongside the Sales Plan field. The lookup records dialog will be displayed. Select **New**.
2. A blank sales plan form will be displayed. Complete the following details:
 - a. **Name.** Enter a name for the sales plan. For example Season 14/15.
 - b. **Sales Plan Type.** Select **Series** from the drop-down list.
3. Select **Save** on the ribbon.
4. Next create the channel price lists linked to the sales plan. You will need to create a channel price list for each channel – variant price list - discount combination. Therefore in this example you will need to create the following channel price lists:
 - a. POS – Standard Pricing – Discount Applies

- b. POS - Standard Pricing – No Discount
 - c. Web – Standard Pricing – Discount Applies
 - d. Web - Standard Pricing – No Discount
5. For the price lists to come into force at the correct times, it is important to set the relative on/off sale dates as follows:

| Channel Price List | On Sale Days | On Sale Hours | Off Sale Days | Off Sale Hours | Discount Percent |
|---|--------------|---------------|---------------|----------------|------------------|
| POS – Standard Pricing – Discount Applies | 90 | | 60 | | 20 |
| POS - Standard Pricing – No Discount | 60 | | -100 | | |
| Web – Standard Pricing – Discount Applies | 90 | | 60 | | 20 |
| Web - Standard Pricing – No Discount | 60 | | -100 | | |

- 6. Once the channel price lists are set up select **Save & Close** on the Sales Plan ribbon.
- 7. The Lookup Records dialog will be displayed. Select **OK** to continue.

Season Ticket Pricing Using sales Plans – Example 3

The following example illustrates how to set up the following pricing regime for season ticket sales:

- Season tickets are offered at a reduced rate when purchased two months before the season starts. Existing season ticket holders get a 20% discount on the standard price, whereas other customer get a 10% discount on standard pricing.

Prior to creating the sales plan the following must be set up:

- Variant Price Lists:
 - Standard pricing
- Channels:
 - Web
 - POS
- Series – current season
- Bookable Product – at least one series type product with variants and channels set. This should be linked to the current series
- Marketing list – all existing season ticket holders must be added to the marketing list

To set up the desired pricing regime carry out the following:

1. Open the series details. Click the lookup button alongside the Sales Plan field. The lookup records dialog will be displayed. Select **New**.
2. A blank sales plan form will be displayed. Complete the following details:
 - a. **Name.** Enter a name for the sales plan. For example Season 14/15.
 - b. **Sales Plan Type.** Select **Series** from the drop-down list.
3. Select **Save** on the ribbon.

| Channel Price List | On Sale Days | On Sale Hours | Off Sale Days | Off Sale Hours | Discount Percent | Marketing List |
|--|--------------|---------------|---------------|----------------|------------------|-----------------------|
| POS – Standard Pricing – STH Discount Applies | 90 | | 60 | | 20 | Season Ticket holders |
| POS – Standard Pricing – Standard Discount Applies | 90 | | 60 | | 10 | |
| POS - Standard Pricing – | 60 | | -100 | | | |

| | | | | | | |
|--|----|--|------|--|----|-----------------------|
| No Discount | | | | | | |
| Web – Standard Pricing – STH Discount Applies | 90 | | 60 | | 20 | Season Ticket Holders |
| Web – Standard Pricing – Standard Discount Applies | 90 | | 60 | | 10 | |
| Web - Standard Pricing – No Discount | 60 | | -100 | | | |

4. Next create the channel price lists linked to the sales plan. You will need to create a channel price list for each channel – variant price list - discount combination. Therefore in this example you will need to create the following channel price lists:
 - a. POS – Standard Pricing – STH Discount Applies
 - b. POS – Standard Pricing – Standard Discount Applies
 - c. POS - Standard Pricing – No Discount
 - d. Web – Standard Pricing – STH Discount Applies
 - e. Web – Standard Pricing – Standard Discount Applies
 - f. Web - Standard Pricing – No Discount
5. For the price lists to come into force at the correct times, it is important to set the relative on/off sale dates as follows:
6. Once the channel price lists are set up select **Save & Close** on the Sales Plan ribbon.
7. The Lookup Records dialog will be displayed. Select **OK** to continue.

3.7. SETTING UP AWAY FIXTURES AND TRAVEL PRODUCTS

THE PROCESS

The following describes how to set up an away venue before being able to place away tickets on sale. The same method can be used to set up away travel, the only difference being that an alternative resource will need to be set up to represent the capacity of the coach.

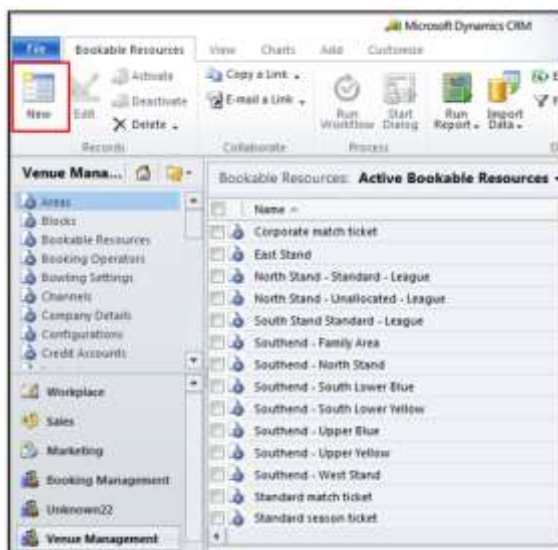
To set up the venue for an away fixture carry out the following process:



STEP 1: CREATING AN AWAY BOOKABLE RESOURCES

The Bookable Resources entity is used to represent the ticket types that you are selling through the Green 4 Ticketing. This would be your Away Match. To create a Bookable Resource record:

- In the CRM **Navigation Panel** select **Venue Management** followed by **Bookable Resources**.
- The Bookable Resource list view will be displayed:



- Select **New** on the ribbon (highlighted above).
- A blank Bookable Resource form will be displayed. Complete the following details:
 - Name.** Enter the name of the resource, for example Away Match.
 - Allocate Seats.** Set to **No**.



Note. All other fields in the Bookable Resource form are not required when setting up an Away Venue.

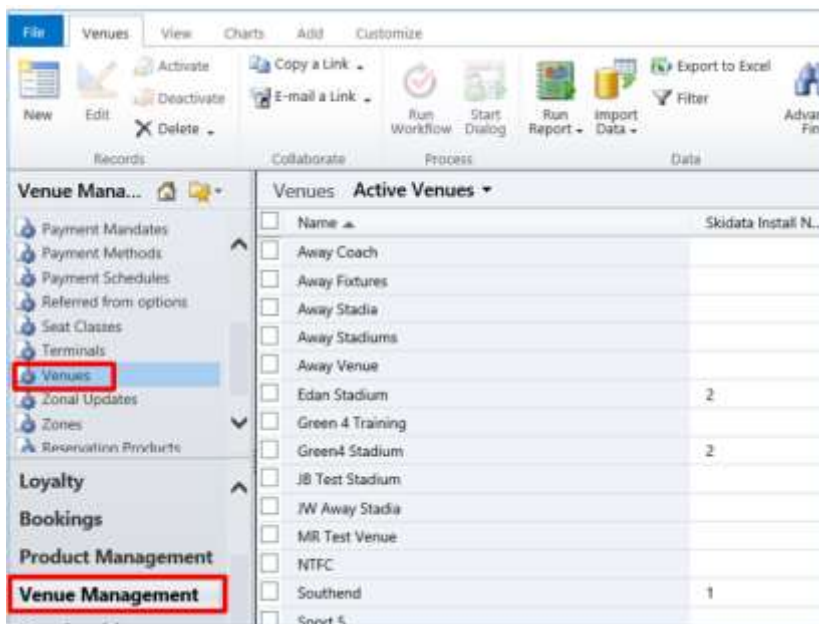
e) Once the details are complete select **Save and Close** on the ribbon.

STEP 2: CREATING AN AWAY VENUE

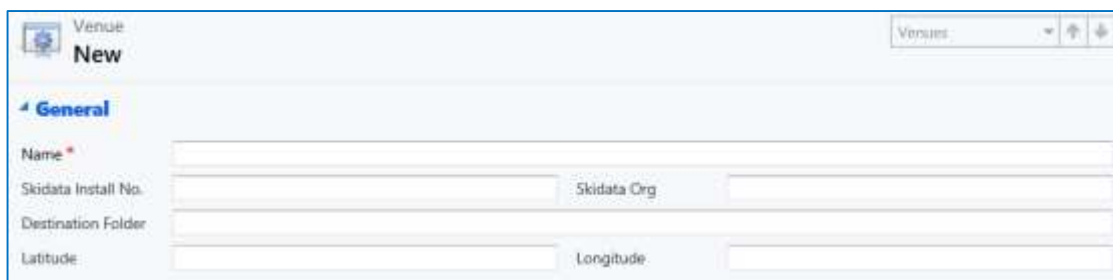


The venue created during this step can be reused for all away fixtures, and therefore should only be created once. To create a venue, carry out the following:

a) Select **Venues** on the **Venue Management** tab. A list of existing venues that meet the current view criteria will be displayed.



b) Select **New** on the ribbon. A blank venue form will be displayed.



c) Complete the following details:

- **Name.** Enter a name for the venue, for example Away Stadium.
- As the Away Game tickets are issued by the home team, the following access control fields should not have to be completed.
 - i. **Skidata Install No.**
 - ii. **Skidata Org.**
 - iii. **Destination Folder.**
 - iv. **Latitude.**
 - v. **Longitude.**

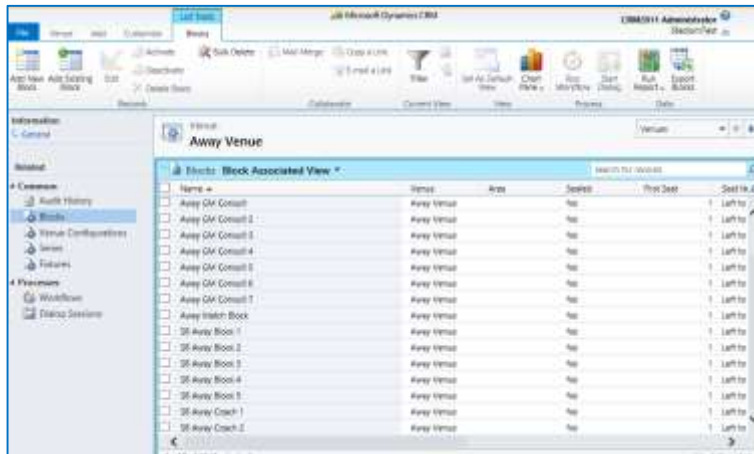
d) Once the details are complete select **Save** on the ribbon.

STEP 3: CREATING A BLOCK TO REPRESENT THE AWAY CAPACITY

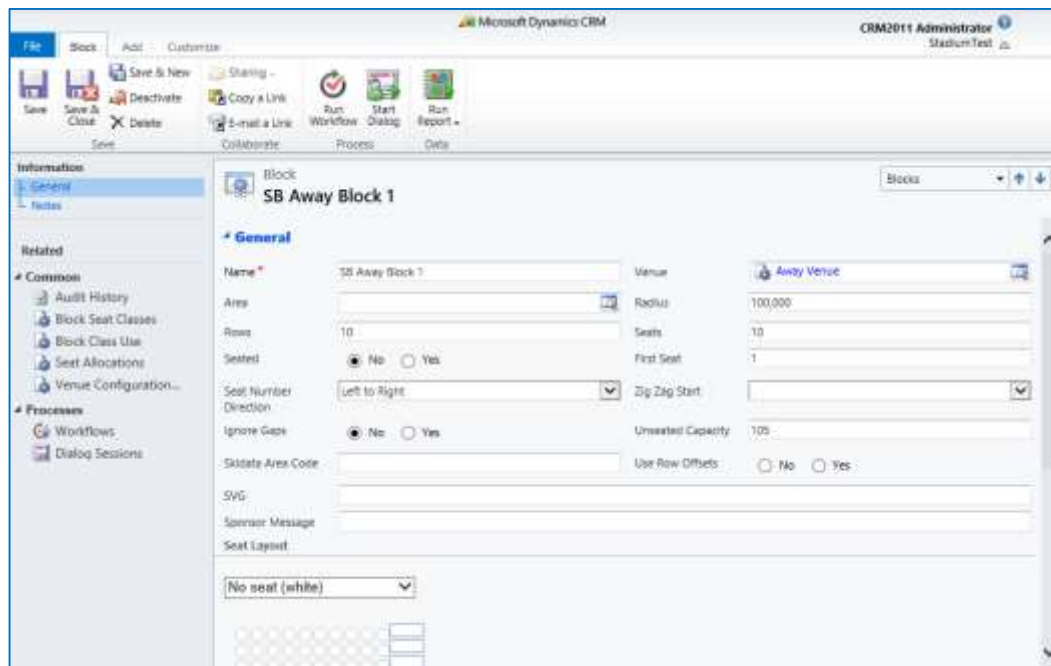


For each away fixture, it will be necessary to create a new block linked to the Away Stadium venue. The block will represent the capacity available for purchase. To create a block, carry out the following:

a) With the Away Stadium venue open in the form view, select **Blocks** in the Navigation area.



b) Select **Add New Block** on the ribbon.



c) A blank form will be displayed. Complete the following details:

- **Name.** Enter a name for the block, for example Away Block.
- **Venue.** The name of the venue will be automatically displayed.
- **Area.** Set up is not required for an Away venue.
- **Radius.** Set up is not required for an Away venue.
- **Rows.** Set up is not required for an Away venue.
- **Seats.** Set up is not required for an Away venue.
- **Seated.** Set to **No**.
- **First Seat.** Set up is not required for an Away venue.
- **Seat Number Direction.** Set up is not required for an Away venue.
- **Zig Zag Start.** Set up is not required for an Away venue.
- **Ignore Gaps.** Set to **No**
- **Unseated Capacity.** Set to away capacity e.g. 200.
- **Skidata Area Code.** Set up is not required for an Away venue.
- **Use Row Offset.** Set to **No**.
- **SVG.** Set up is not required for an Away venue.
- **Sponsor Message.** Set up is not required for an Away venue.
- **Seat Layout.** This area does not need to be completed.

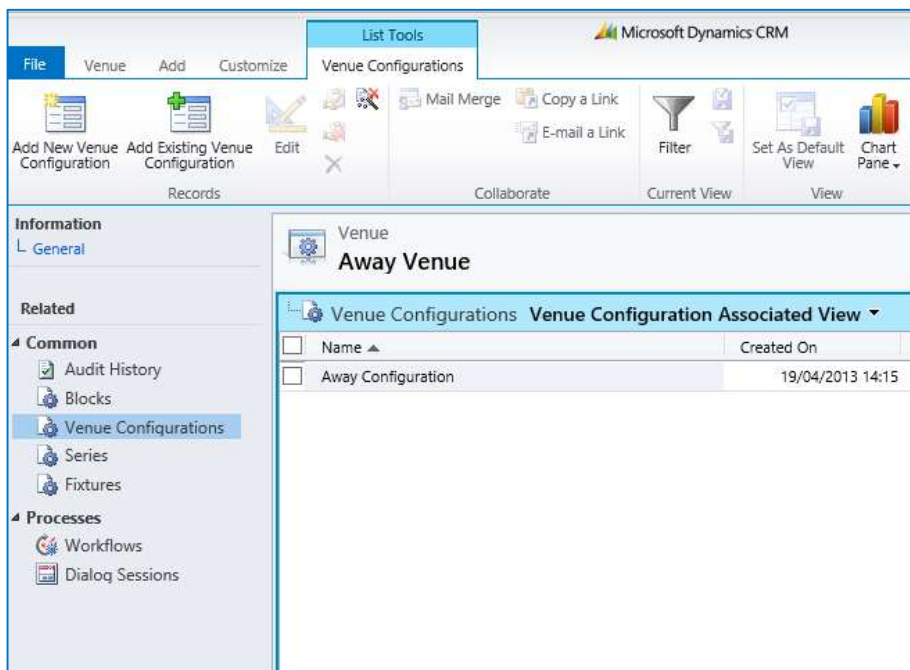
d) Once the details are complete select **Save & Close** on the ribbon.

STEP 4: CREATING AN AWAY VENUE CONFIGURATION

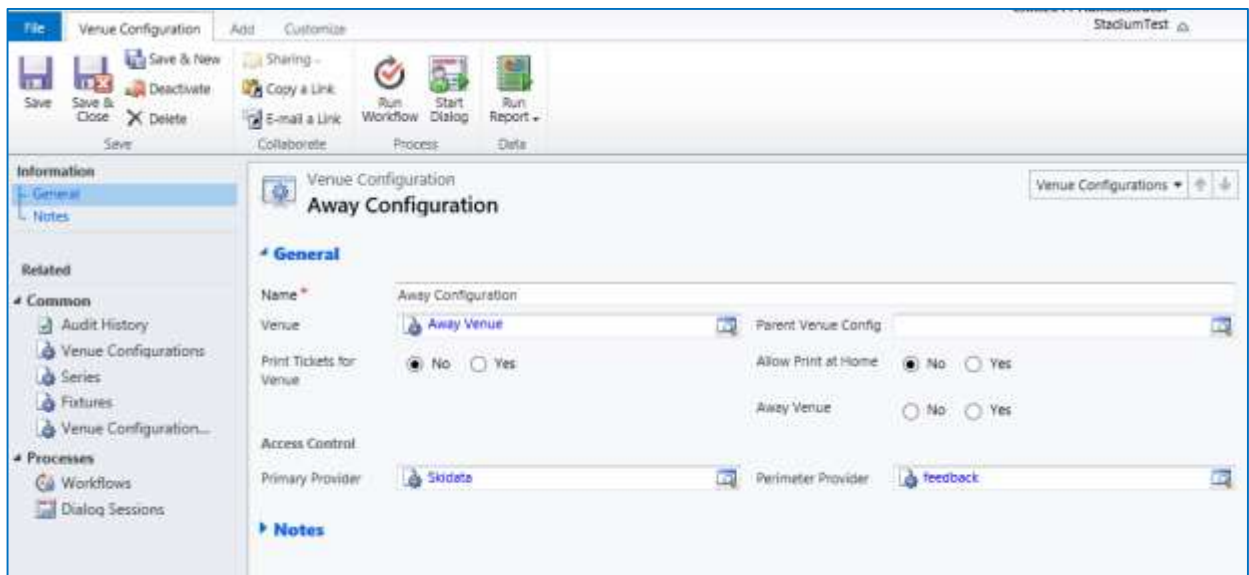


The Venue Configuration created during this step can be reused for all away fixtures, and therefore should only be created once. To create a Venue Configuration, carry out the following:

a) With the Away Stadium venue open in the form view, select **Venue Configurations** in the Form Navigation area.



b) Select **Add New Venue Configuration** on the ribbon.



c) A blank form will be displayed. Complete the following details:

- **Name.** Enter a name for the Venue Configuration, for example Away Stadium.
- **Venue.** The venue will be automatically filled in.
- **Parent Venue Config.** Use the Find button to search for the parent configuration file (if applicable).
- **Print Tickets for Venue.** This can be used to prevent tickets being printed for a particular venue e.g. an away venue. To prevent tickets being printed for an away venue the attribute must be selected as **No**.
- **Allow Print at Home.** This defines if the print at home option is allowed for the venue configuration, it should be selected as **No** when creating an away venue configuration.
- **Away Venue.** Select **Yes** this will allow the Away Venue to be configured.
- **Primary Provider.** Set up is not required for an Away venue.
- **Perimeter Provider.** Set up is not required for an Away venue.

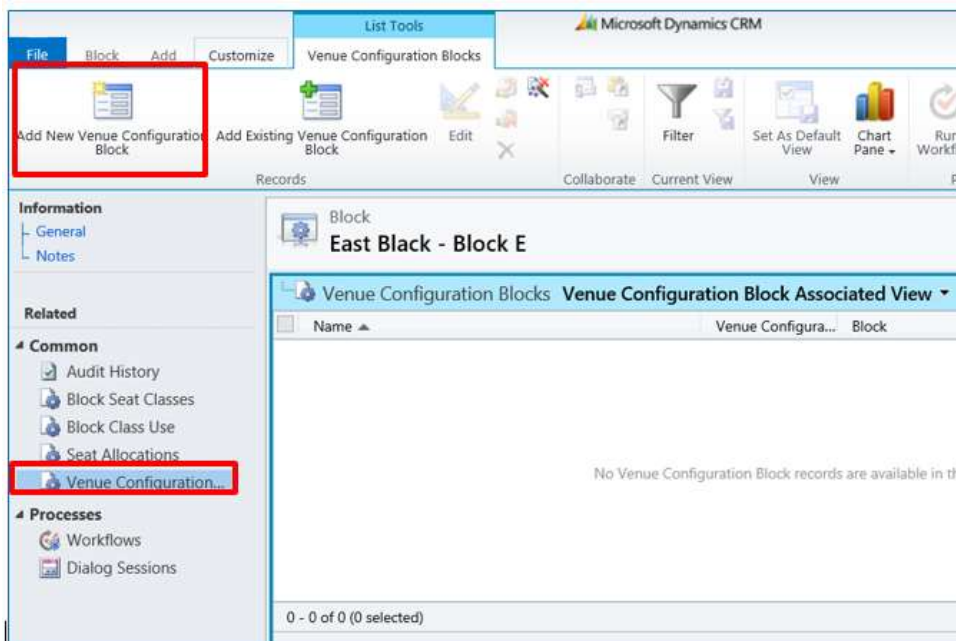
d) Once the details are complete select **Save** on the ribbon.

STEP 5: CREATE A VENUE CONFIGURATION BLOCK & BOOKABLE RESOURCE

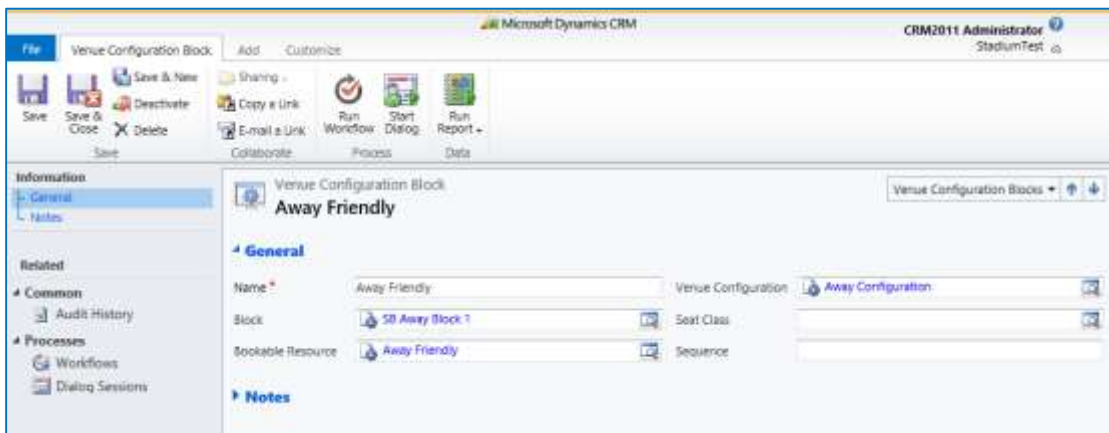


For each block created it is necessary to create a venue configuration block which will link the block to the away stadium venue configuration. It will be necessary to create a venue configuration block for each away fixture. To create a venue configuration block:

- a) With the Away venue configuration open in the form view, select **Venue Configuration Blocks** in the form navigation area.



- b) Select Add New Venue Configuration Block on the ribbon. A blank form will be displayed. Complete the following details:



- **Name.** Enter a name for the venue configuration block. For example enter the name of the away stadium.
 - **Venue Configuration.** The venue configuration will be automatically filled in
 - **Block.** Use the Lookup Records dialog to select the correct away block.
 - **Seat Class.** Leave blank.
 - **Bookable Resource.** Use the Lookup Records dialog to select the Away bookable resource, created earlier.
 - **Sequence.** Leave this field blank.
- c) Once the details are complete select **Save & Close** on the ribbon.
- d) The Lookup Records dialog will be redisplayed with the new resource highlighted. Select **OK** to return to the Venue Configuration Block record.
- e) Once the details are complete select **Save & Close** on the ribbon.

STEP 6: SET UP YOUR AWAY SERIES AND FIXTURE



Once the venue has been set up for your away fixture, you can use near to the standard process for putting the fixture on sale as discussed previously in [Section 3.5 Placing a new fixture on sale](#). However there are a number of fields that need to be selected that differ to the standard process for placing Away fixtures on sale. The table below gives a brief outline on how to put Away fixtures on sale whilst highlighting the fields that must be completed to place an Away fixture on sale.

It will be assumed that you have previously set up the following items:

- **Channels** – ensure that the **Show Stadium Options** has been set to **‘Yes’** to show the options for Fixtures and Series on the Epos home screen.
- **Variant Types.** [\(Section 3.2\).](#)
- **Variant Price List.** [\(Section 3.3\).](#)

| Task | Comments |
|----------------------------|--|
| Step 1: Sales Plans | A new fixture type Sales Plan will need to be created for Away fixtures, all away fixtures can be included in this Sales Plan. |
| Step 2: Channel Price List | The Channel Price List is linked to your Away fixtures Sales Plan. You will need to create a channel price list from your Sales Plan for each channel – variant price list combination. A new Channel Price List will be needed for each away fixture that you set up, this is to allow for differing away fixture on/off sale dates and ticket pricing. |

| Task | Comments |
|--|--|
| Step 3: Fixture | <p>For each away fixture, create a fixture record. The fixture should be linked to the series created in the previous step</p> <p><u>Please Note. Unlike a standard home fixture the following fields must be completed for an Away fixture:</u></p> <ul style="list-style-type: none"> • Record Away Ticket Details. Select Yes. • Venue Configuration. Select the Away Venue Configuration that you have previously created. • Sales Plan. Use the Look Up to select the Fixture Sales Plan created previously. |
| Step 4: Series | <p>A new series must be created to hold all the away fixtures. For example it could be named Away Fixtures 2014/15.</p> <p>Ensure that the following are completed:</p> <ul style="list-style-type: none"> • Venue: Enter the Away Venue previously completed. • Venue Configuration: Enter the Away Venue Configuration previously completed • Select Seats: Set to No • Series Start and End Date: Enter appropriate dates. |
| Step 5: Bookable Product – Product Details | <p>Create a fixture type Bookable Product to represent the tickets on sale for away fixtures. Ensure the following are completed:</p> <ul style="list-style-type: none"> • Type: Select Fixtures. • Bookable Resource: Set to the Away Bookable Resource created previously. • Series: Set to the Away fixture type Series previously created. • Make sure that that Beneficiary Requirement set to Required as the away ticket information is captured against a Beneficiary in the POS. |
| Bookable Product – Channels | <p>Using the Bookable Product form, select the channels the away product will be sold via.</p> |
| Bookable Product – Variants | <p>Using the Bookable Product form, select the variant types for the away product e.g. Adult, Senior, and Junior. Where possible reuse the variants available in the system</p> |

| Task | Comments |
|----------------------------|--|
| Bookable Product – Pricing | Using the Bookable Product form, enter the price details for away product. It is recommended that a new Variant Price List is created for each away fixture. |

Away Fixture Pricing- Example 1

The



Note: Coach travel is set up in the same way as the fixture using an alternative resource to represent the capacity of the coach.

following example illustrates how to set up the following pricing regime for away fixtures:

- The fixture is removed from sale from all channels 1 day before the fixture
- Travel options are only sold via the POS channel

As pricing and products for away fixtures is governed by the host club, it will be invariably necessary to create a new sales plan for each away fixture.

Prior to creating the sales plan the following must be set up:

- **Variant Price Lists:**
 - Away Fixture Pricing (fixture specific)
 - Channels:
 - Web
 - POS
- **Series** – current away season
- **Fixture** – at least one fixture linked to the current series
- **Bookable Product** – at least two fixture type products with variants and channels set. This should be linked to the current series. Note the product that is only available on the POS should not have the Web channel box selected.

To set up the desired pricing regime carry out the following:

1. Open the fixture details. Click the lookup button alongside the Sales Plan field. The lookup records dialog will be displayed. Select **New**.
2. A blank sales plan form will be displayed. Complete the following details:
 - a. **Name.** Enter a name for the sales plan. For example vs Green 4 FC 14/15.
 - b. **Sales Plan Type.** Select **Fixture** from the drop-down list.

3. Select **Save** on the ribbon.
4. Next create the channel price lists linked to the sales plan. You will need to create a channel price list for each channel – variant price list combination. Therefore in this example you will need to create the following channel price lists:
 - a. POS - Away Fixture Pricing
 - b. Web - Away Fixture Pricing
5. For the price lists to come into force at the correct times, it is important to set the relative on/off sale dates as follows:

| Channel Price List | On Sale Days | On Sale Hours | Off Sale Days | Off Sale Hours |
|----------------------------|--------------|---------------|---------------|----------------|
| POS - Away Fixture Pricing | 365 | | 1 | |
| Web - Away Fixture Pricing | 21 | | 1 | |

6. Once the channel price lists are set up select **Save & Close** on the Sales Plan ribbon.
7. The Lookup Records dialog will be displayed. Select **OK** to continue.
8. This process will need to be repeated for each away fixture as it is created to allow for different product sets and prices.

STEP 7. CAPTURING AWAY TICKET INFORMATION IN THE POS

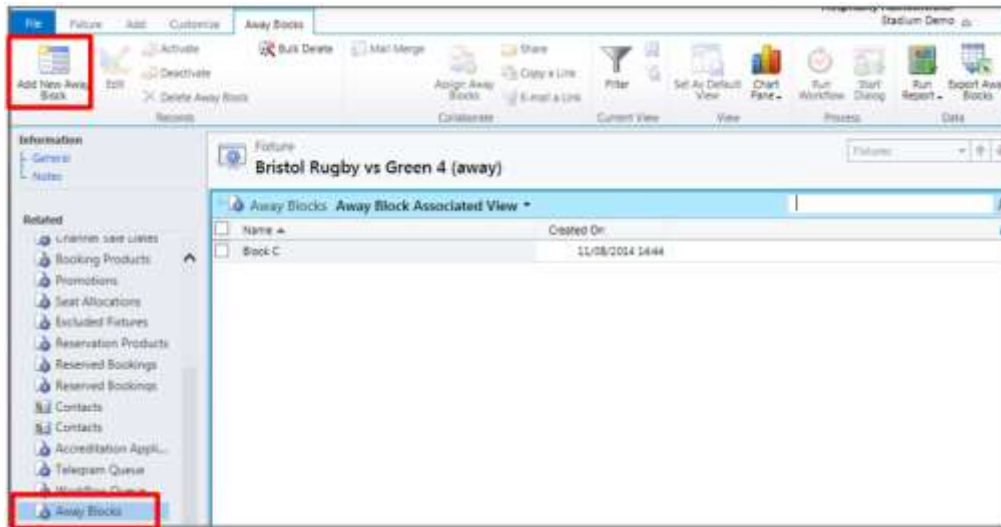
If there is a requirement to capture Away ticketing information i.e. Seat No.'s etc when selling Away tickets in the POS, the following set up needs to be done in CRM:

- Set up an Away Block against the Fixture
- Define ticket details to be captured in the POS

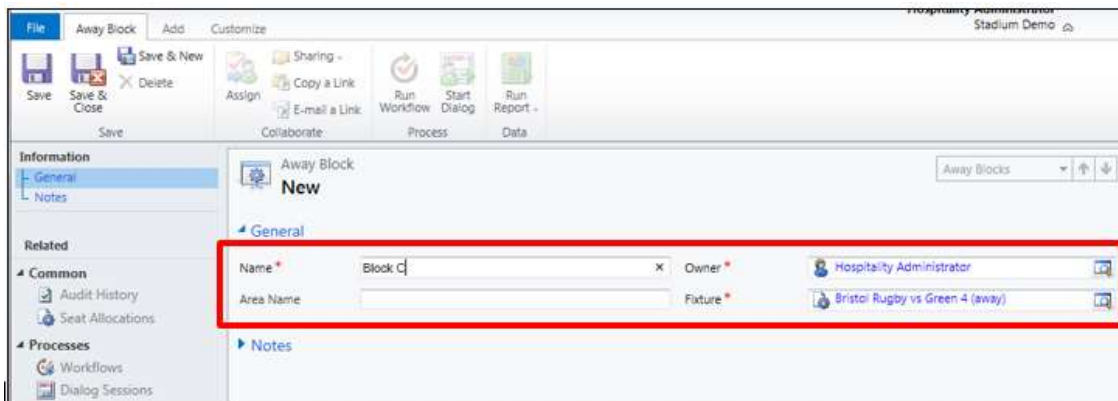
Setting up Away Block

To do this, complete the following:

- a) With the Away fixture form open, select **Away Blocks** in the navigation area.
- b) Select **Add New Away Blocks** in the ribbon.



c) Capture the Away Block name for the Away Fixture.

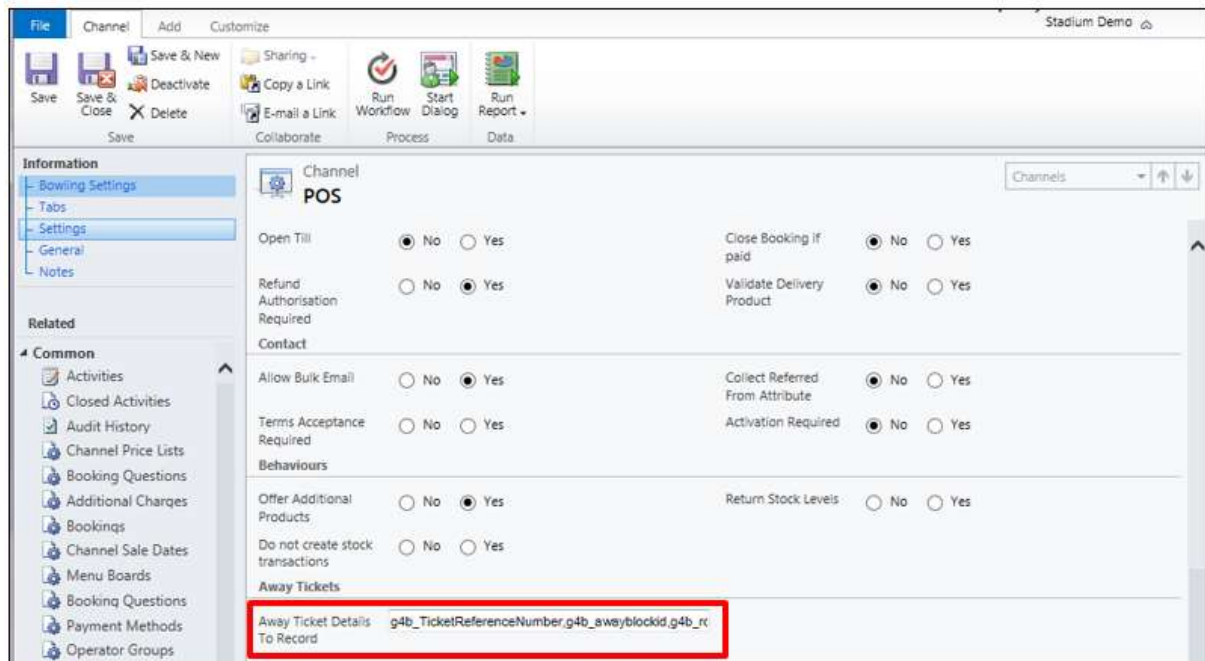


Setting up Fields in POS

a) Select the **Channel Price Lists** entity in the form navigation area of the Fixture Form.



- b) Select the **POS** Channel.
- c) Add the following comma (',') separated list to the field **Away Ticket Details To Record** (Highlighted below):
g4b_TicketReferenceNumber,g4b_awayblockid,g4b_row,g4b_seat,g4b_SeatPostfix



- d) This will ensure the Away Block names are contained in a drop down list when selecting Beneficiaries in the POS
- **g4b_TicketReferenceNumber** – Reference No. Field in the POS
 - **g4b_awayblockid** – Block Field, note by setting up the Block as above the block name will be contained in a drop down on the POS
 - **g4b_row** – Row Field in the POS
 - **g4b_seat** – Seat Field in the POS
 - **g4b_SeatPostfix** – Seat Letter Field in the POS

3.8. SETTING UP STOCK BOOKABLE PRODUCTS

The sale of stock products (e.g. guide books) through Green 4 Ticketing relies upon a number of entities within the system, all of which must be correctly configured in order to place the product on sale at the correct price. This section covers the sale of basic stock products and does not describe in detail the Green 4 Food & Beverage offering.

The flow for putting a stock product on sale is similar to that followed when putting on sale fixture and series tickets:

It is assumed that the following items have been set up in CRM:

- **Channels.** The channels the products will be sold via.
- **Variant Types.** The divisions of the product available. For example for merchandise such as a cuddly toy the variant type would be “each”, whereas for drinks it may be “pint” and “half”. Variant types should be reused where possible. To create a Variant Type see [Section 3.2.](#)
- **Variant Price List.** The Variant Price List is selected in the Variant and Pricing section of the Bookable Product form, this being 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. To create a new Variant Price List see [Section 3.3.](#)
- **Sales Plan.** A default sales plan of type of Other linked to the company details needs to be set up. This sales plan is used for all stock, scheduled and auto-scheduled products.

STEP 1: SET UP YOUR CHANNEL PRICE LISTS

Channel prices lists are used to link a variant price list to a channel. If you wish the prices entered on a variant price list to be charged then you must link the price list to the channel. Multiple price lists can be in use simultaneously.

The channel price list can be reused; therefore you may only need to create the channel price list once for each variant price list – channel combination.

To set up a channel price list:

- a) On the CRM navigation panel, select **Sales Plan** on the **Product Management** tab.
- b) A list of sales plans matching the view criteria will be displayed.
- c) Open the **Default Sales Plan** (the default sales plan should be linked to the company details record in CRM).
- d) Select **Channel Price List** in the form navigation area.
- e) A list of channel price lists that have been previously linked to the variant price list will be shown. Select **Add New Channel Price List** on the ribbon.
- f) A blank channel price list form will be displayed. Complete the following details:
 - **Name.** The name of the channel price list.
 - **Channel.** Select the Look Up icon alongside the field. The Look Up Records dialog will be displayed. Select the appropriate channel before clicking **OK** to continue.
 - **On Sale Date.** Enter the date and time when the price list will be available for use by the channel. An On Sale Date must be entered when creating a price list for stock products.

- **Marketing List.** Select the marketing list the channel price list relates to. If a marketing list is applied to a channel price list, only contacts that have been added to the marketing list will use the channel price list. This option can be used to give beneficial prices to people that have previously bought a particular product, for example a membership product. Preferential pricing can either be driven by the use of a different variant price list, or by entering a discount percent.
- **Discount Percent.** If using a discount enter the percentage discount offered to users of the channel price list. This option is used in conjunction with a marketing list to offer members of the marketing list a discount.
- **Discount Category.** If using a discount use the lookup to select the product category the discount percent will be applied to. If a product category is not entered, the discount percent will be applied to all products.
- **Sequence.** The sequence number is used to determine which channel price list is used if there is more than one valid channel price list available.
- **Variant Price List.** Use the Lookup Records dialog to select the appropriate price list. The price list that you are to use for the bookable product should be selected.
- **Off Sale Date.** Enter the date and time when the price list will stop being available for use by the channel. An Off Sale Date must be entered when creating a price list for stock products.
- **Max Quantity.** This option, when used in conjunction with a marketing list can be used to limit the number of a selected product a customer can purchase. This option can be used to limit the number of products a customer can buy at a preferential rate. Alternatively this option can be used to limit the number of tickets a member can purchase before general release.
- **Discount Rounding.** Enter the discount rounding i.e. to the nearest penny, 10p, pound. If a value is not entered the system will default to rounding to a penny.



Note: All other fields in the Channel Price List form that have not been described above do not need to be completed/changed.

g) Once the details are complete select **Save & Close** on the ribbon.

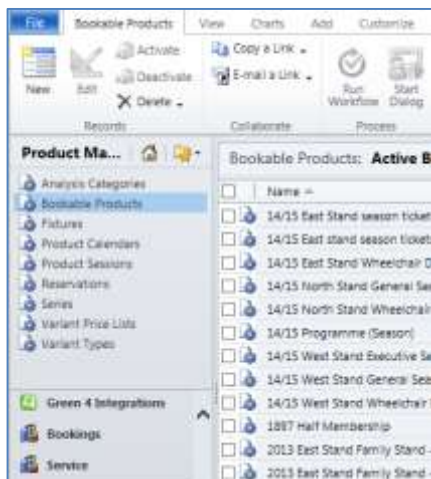
A channel price list will need to be created for each Variant Price List – Channel combination created.

STEP 2: CREATE THE BOOKABLE PRODUCT

The Bookable Product entity is used to represent products that are sold through the Green 4 Ticketing application, for example match tickets, season tickets and merchandise. For each stock product that you are selling through the system you must create a stock type bookable product.

To create a stock bookable product:

- On the CRM navigation panel, select **Bookable Products** on the **Product Management** tab.
- A list of bookable products that match the current view criteria will be displayed. Select **New** on the ribbon.



c) A blank bookable product form will be displayed. For a stock product it is necessary to complete the following *Product Details*:

- **Name.** Enter a name for the product. The name will be visible to customers, and should therefore reflect the nature of the product.
- **Translated Name.** Used for translated implementations. See [Set up for Multi Lingual using the Translation Field](#) for more information.
- **Description.** Enter a description of the product. The Description field can be set as a translatable string if desired (if used in the Web UI). [See the Set up for Multi Lingual using the Translation and Description Field](#) for further information.
- **Type.** Use the drop-down list to select the type of product. In this instance select **Stock** from the list of available values.
- **Is Anonymous.** Select **Yes** if the purchaser is not required to provide a name when buying the product. The channel must also be set to allow the sale of anonymous products.
- **External Product ID.** Can be used to link the bookable product to an external list of products.
- **Sequence.** Enter a sequence number for the product. The sequence number is used to determine the order in which products are displayed in the POS and Web channels.
- **Beneficiary Requirement.** Use the drop-down list to select if a customer's name is required when the product is purchased, for example the details of the season ticket holder. Select from the following options:
 - i. **Not Required.** The customer will not be asked for their name and contact details.
 - ii. **Requested.** The customer will be asked for their name and contact details, but can skip this option if they do not wish to provide their details.

iii. **Required.** The customer must provide their name and contact details. This option should be selected when setting up a season ticket or membership product.

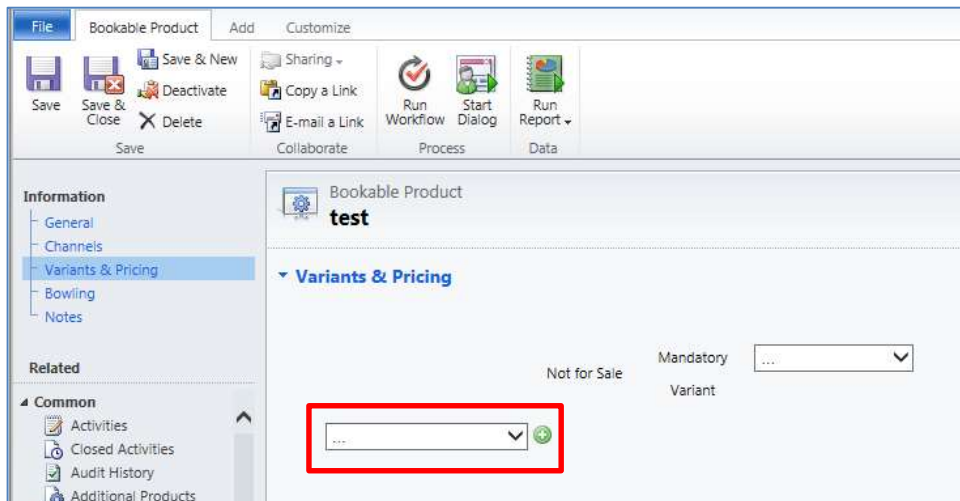
- **Report Category.** Used for reporting purposes to categorise the products sold through Green 4 Ticketing.
- **Available Offline.** Select **Yes** if the bookable product is to be available for purchase through the offline EPOS. This option cannot be used for products that require capacity to be monitored.
- **Category.** Use the Look Up dialog to select the product category. The category is used to group products, for example into tickets, food, etc. The categories are used by the price list and channel editors.
- **Available Date From.** Enter the date the product goes on sale.
- **Available Date To.** Enter the date the product is removed from sale.
- **Available Time From.** Enter the time the product goes on sale.
- **Available Time To.** Enter the time the product is removed from sale.
- **Print At Home.** Select Yes/No depending on if the product is available to print at home.
- **Requires Delivery.** Select Yes/No depending on if the product requires a delivery address when purchasing the product.



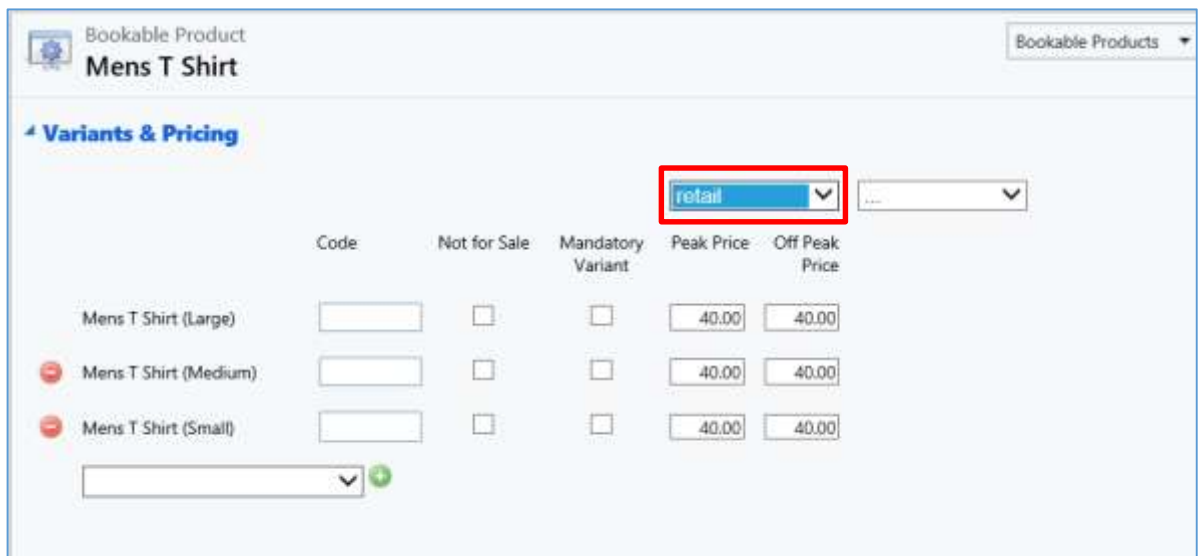
Note. All other fields in the Bookable Product form that have not been described above do not need to be completed/changed.

- d) Once the details are complete select **Save** on the ribbon.
- e) Next, it is necessary to indicate which channels the product can be bought via. To set the *Channels* carry out the following:
- Select **Channels** in the Form Navigation area.
 - The channels that have been set up during the configuration on your system will be listed. Select the checkbox alongside each channel through which the product will be sold.
 - Select **Save** on the ribbon.
- f) Next, it is necessary to identify the *Product Variants* and *Prices*:
- Select **Variants & Pricing** in the Form Navigation area.
 - To select a variant, in the drop-down list on the left hand side (highlighted below), select the appropriate option. All of the variants available in your system will be listed. If you have categorised the variants they will displayed in the relevant categories.

- Select the green cross alongside the variant name to add.



- Repeat until all variants are listed. If you need to remove a variant, click the red minus sign alongside the variant.
- To enter price information for the product, select the relevant Variant Price List from the drop down at the top of the Variants & Pricing section (highlighted below):



- Enter the pricing (peak and off peak) information for each of the variants that are to be included on the price list. The value entered into the Peak and Off Peak price field should be the same for this type of product.
- Repeat this process for each price list used to govern the pricing of the selected product.

Once the pricing details are complete select **Save & Close** on the ribbon to save the product

STOCK PRODUCT ON-SALE CHECK LIST

The following checklist can be used to ensure that you have completed all of the tasks required to place a stock product on sale:

| Task | Completed? | Comments |
|---|------------|--|
| Created a channel price list | | The channel price list should be linked to the default sales plan The channel price list should link the channels to the variant price list Ensure the channel price list dates are valid. |
| Create a stock bookable product | | Ensure the Available Date From and To dates are valid. |
| Assigned channels to the bookable product | | Ensure the relevant channel check boxes are ticked. |
| Assigned variants to the bookable product | | Ensure the variants are listed. |
| Assigned prices to the bookable product | | Prices should be added to an active variant price list. |

UPSELLING PRODUCTS (ADDITIONAL PRODUCTS)

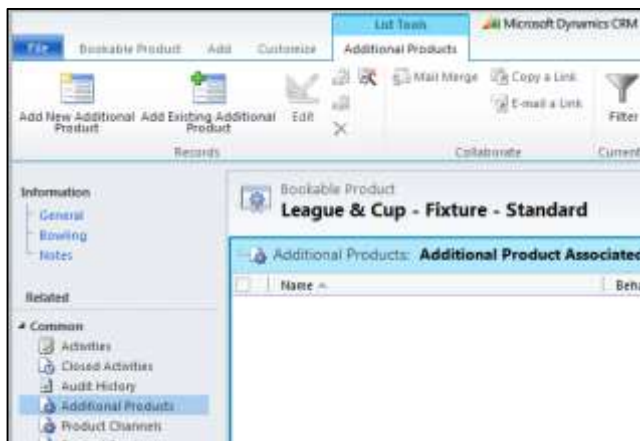
Using the additional products functionality in Green 4 Ticketing it is possible to present the user with a list of upsell products at the point when they either add a product to the shopping cart, or when they select to pay for their goods. For example you can upsell a match programme when a customer purchases a match ticket.

To use additional products:

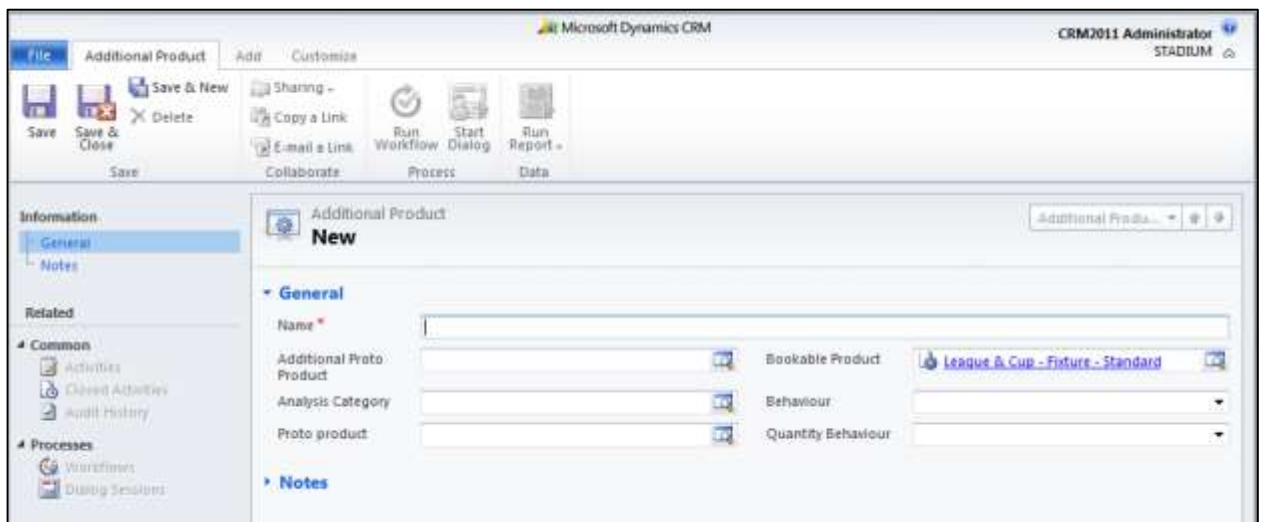
- In the CRM Navigation Panel select **Product Management** followed by **Bookable Products**.
- The Bookable Products list view will be displayed.
- Double-click over the Bookable Product that you wish to link upsell products to.
- The Bookable Product will be opened in the form view.
- In the Form Navigation Panel select **Additional Products**.



Note. Only Stock products can be added as additional products.



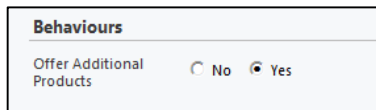
- f) Select **Add New Additional Product** on the ribbon.
 g) A blank Additional Product form will be displayed:



- h) Complete the following details:
- **Name.** Enter a name for the additional product.
 - **Additional Proto Product.** Use the Look Up Records dialog to select the upsell product.
 - **Bookable Product.** The Bookable Product field will be pre-populated.
 - **Analysis Category.** Select the analysis category for the additional product.
 - **Behaviour.** Select when the additional product will be offered to the customer. This is not used in Green 4 ticketing.
 - **Proto Product.** Not used in Green 4 Ticketing.
 - **Quantity Behaviour.** Enter the number of upsell products that will be offered. Select from **Per Person**, **Per Unit** or **Per Booking**. This is not used in Green 4 ticketing.
- i) Once the details are complete, select **Save & Close** on the ribbon.

Having set up the upsell products it is necessary to select which channels will allow the upsell of additional products. To set a channel to allow the upsell of additional products carry out the following:

- a) In the CRM Navigation Panel select **Venue Management** followed by **Channels**.
- b) The Channels list view will be displayed.
- c) Open the appropriate channel in the form view.
- d) Set the field **Offer Additional Products** field to **Yes**.



The screenshot shows a form titled "Behaviours". Inside the form, there is a field labeled "Offer Additional Products" with two radio button options: "No" and "Yes". The "Yes" option is selected, indicated by a filled radio button.

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

3.9. SETTING UP PRODUCTS AS MEMBERSHIPS

Membership products often allow access to specified activities or events for a certain period of time. Memberships can last for different durations and can also offer discounts and promotions for certain products. A membership usually has an associated membership number.

It is assumed that the following items have been set up in CRM:

- **Channels.** The channels the products will be sold via.
- **Variant Types.** Variant Types describe the type of Bookable Product that you can purchase. For example there should be a Variant Type created for each of the different groups of people that a membership could be sold to such as Adult, Child, Student or OAP. Variant types should be reused where possible. To create a Variant Type see [Section 3.2.](#)
- **Variant Price List.** The Variant Price List is selected in the Variant and Pricing section of the Bookable Product form, this being 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. To create a new Variant Price List see [Section 3.3.](#)
- **Sales Plan.** A default sales plan of type Other linked to the company details needs to be set up. This sales plan is used for all stock, scheduled and auto-scheduled products.

STEP 1: MEMBERSHIP NUMBER SET UP

When setting up Membership, the option exists to have the membership numbers auto generated by the system or manually entered or scanned. The latter would be for instances when existing membership cards exist and the barcode numbers on these cards is to be used.

Manually captured Membership Numbers:

To set up for Membership Numbers to be manually captured:

- a) Select **Channels** on the **Venue Management** tab.
- b) Select POS.
- c) Ensure the **Membership Number Read Only**, is selected to **No**

Membership Number Read Only No Yes

- d) Select **Company Details** on the **Venue Management** tab.
- e) Open the Active Company Details form

Membership Number Auto Generated No Yes

- f) The field **Membership Number Auto Generated** will be defaulted to **Yes**, select **No** to enable the membership number to be captured manually.

The set up explained above will enable the POS Operator to manually capture or scan a Membership Number against the Beneficiary in the POS.

Auto Generated Membership Numbers

To auto generate membership numbers:

- a) Select **Channels** on the **Venue Management** tab.
- b) Select **POS**.
- c) Ensure the **Membership Number Read Only**, is selected to **Yes**

Membership Number Read Only No Yes

- d) Select **Company Details** on the Venue Management tab.
- e) Open the **Active Company Details** form

Membership Number Auto Generated No Yes

- f) Ensure the **Membership Number Auto Generated**, is selected to **Yes**.



Note. If the system has been set up to auto generate membership numbers and the corresponding setting for the membership number field set to Read Only, the membership number cannot be captured, but will be auto populated on purchase of a membership type product in the POS.

STEP 2: SETTING UP YOUR CHANNEL PRICE LIST

Channel prices lists are used to link a variant price list to a channel. Multiple price lists can be in use simultaneously.

The channel price list can be reused; therefore you may only need to create the channel price list once for each variant price list – channel combination.

- a) On the CRM navigation panel, select **Sales Plan** on the **Product Management** tab.
- b) A list of sales plans matching the view criteria will be displayed.

- c) Open the Default Sales Plan (the default sales plan should be linked to the company details record in CRM).
- d) The Sales Plan record will open in the form view. Select **Channel Price Lists** in the form navigation area.
- e) A list of existing channel price lists linked to the sales plan will be displayed. To create a new channel price list select **Add New Channel Price List** on the ribbon.
- f) Complete the following details:
 - **Name.** Enter a name for the channel price list.
 - **Channel.** Select the appropriate channel.
 - **On Sale Date.** Enter the date when the channel price list will come into use.
 - **Marketing List.** If applicable select the marketing list the channel price list relates to. If a marketing list is applied to a channel price list, only contacts that have been added to the marketing list will use the channel price list. This option can be used to give beneficial prices to people that have previously bought a particular product, for example a membership product. Preferential pricing can either be driven by the use of a different variant price list, or by entering a discount percent.
 - **Discount Percent.** If a discount is to be used, enter the discount percent.
 - **Discount Category.** If the discount is to be applied to a subset of products only, select the product analysis category that the subset of products have been linked to.
 - **Sequence.** Enter the sequence number. The sequence number will determine the order in which channel price lists are applied if multiple are in valid (by date).
 - **Variant Price List.** Select the variant price list to be used.
 - **Off Sale Date.** Enter the date the channel price list will stop being used. This field can be left blank.
 - **Max Quantity.** If the customer is limited to only buying a defined number of products at the discount price, e.g. the member can purchase one lift pass at 50% price only per booking, enter the maximum quantity. If this field is left blank the member will be able to purchase unlimited numbers of products at the discounted price.
 - **Discount Rounding.** Enter the discount round value (in pence). The discount will be rounded to this value when applied to the shopping cart. For example, enter 10 to round to the nearest 10p.



Note: All other fields in the Channel Price List form that have not been described above do not need to be filled/changed.

- g) Once the details are complete, select **Save & Close** on the ribbon.

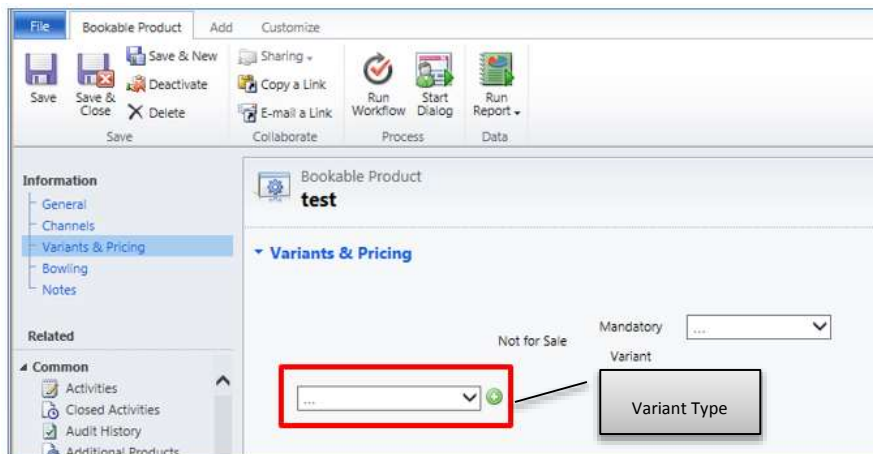
STEP 3: CREATE THE BOOKABLE PRODUCT

The Bookable Product entity is used to represent products that are sold such as the particular membership products. To set up a bookable membership product carry out the following:

To set up a bookable membership product carry out the following:

- a) Select **Bookable Products** on the **Product Management** tab.
- b) Select **New** on the ribbon. A blank Bookable Product form will be displayed. Complete the following:
- **Name.** Enter a name for the product. The name will be visible to customers, and should therefore reflect the nature of the product.
 - **Translated Name.** Used for translated implementations. For more information see the [set up for Multi Lingual using the Translation Field](#)
 - **Description.** Enter a description of the product. The Description field can be set as a translatable string if desired (if used in the Web UI). [See the Set up for Multi Lingual using the Translation and Description Field](#) for further information.
 - **Type.** Use the drop-down list to select the type of product. For memberships select **Stock** from the list of available values.
 - **Payable By.** If the product can be paid for using direct debit select the direct debit payment method.
 - **VAT Code.** Select the VAT Code that applies to the product.
 - **External Product ID.** May be used for access control.
 - **Sequence.** Enter a sequence number for the product. The sequence number is used to determine the order in which products are displayed in the POS and Web channels.
 - **Beneficiary Requirement.** Use the drop-down list to select **Required**, the customer must provide their name and contact details when setting up a membership product.
 - **Available Offline.** Select **Yes** if the bookable product is to be available for purchase through the offline EPOS. This option cannot be used for products that require capacity to be monitored.
 - **Category.** Use the Look Up dialog to select the product category. The category is used to group products, for example into memberships, food, etc. The categories are used by the price list and channel editors.
 - **Product Calendar.** Select the default product calendar. For more information on Product Calendars see [Product Calendars](#).
 - **Is Membership.** Select **Yes** when creating a membership scheme.
 - **Membership Duration.** For membership products, enter the duration of the membership. The duration will be used in conjunction with the entry in the membership duration unit field.

- **Membership Duration Unit.** Select the membership duration unit, for example is the membership duration counted in **weeks, months** or **years**. This field will be used in conjunction with the membership duration field.
 - **Print At Home.** Select Yes/No depending on if the product is available to print at home.
 - **Requires Delivery.** Select Yes/No depending on if the product requires a delivery address when purchasing the product.
- c) Select **Save** on the ribbon.
- d) Next, it is necessary to indicate which channels the product can be bought via. To set the Channels carry out the following:
- Select **Channels** in the Form Navigation area.
 - The channels that have been set up during the configuration on your system will be listed. Select the checkbox alongside each channel through which the product will be sold, for example POS or Web.
 - Select **Save** on the ribbon.
- e) Next, it is necessary to identify the Product Variants and Prices:
- Select **Variants & Pricing** in the Form Navigation area.
 - To select a variant, in the drop-down list on the left hand side (highlighted below), select the appropriate option. All of the variants available in your system will be listed. If you have categorised the variants they will displayed in the relevant categories.
 - Select the green cross alongside the variant name to add.



- Repeat until all variants are listed. If you need to remove a variant, click the red minus sign alongside the variant.



Note. Once a variant is sold it can then not be removed from the Variant and Pricing list. Therefore ensure the correct variants are set up for your product before you begin to sell them.

- To enter price information for the product, select the relevant Variant Price List from the drop down at the top of the Variants & Pricing section (highlighted below):

| | Code | Not for Sale | Mandatory Variant | Peak Price | Off Peak Price |
|--------------------------------------|----------------------|--------------------------|--------------------------|------------|----------------|
| Standard Leisure Membership (Adult) | <input type="text"/> | <input type="checkbox"/> | <input type="checkbox"/> | 45.00 | 45.00 |
| Standard Leisure Membership (Junior) | <input type="text"/> | <input type="checkbox"/> | <input type="checkbox"/> | 35.00 | 35.00 |

- Enter the pricing (peak and off peak) information for each of the variants that are to be included on the price list. The peak and off peak price value entered here should be the same.
 - Repeat this process for each price list used to govern the pricing of the selected product.
- g) Select **Save & Close** on the ribbon to close the Bookable Product record.

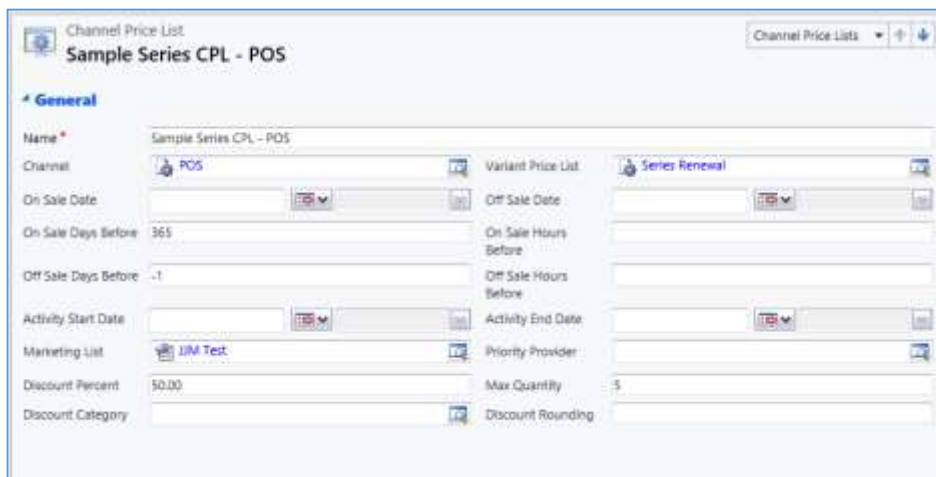
3.10 ENTITLEMENTS

Entitlements allow customers, who are contained in a Marketing List, to obtain a preferential price for a product.

For example this may be for a cup fixture where all Season Ticket holders are entitled to one ticket at a 20 per cent discounted rate. Entitlements are added by creating a Channel Price List which has a Marketing List, a Max Quantity of the product a customer is entitled to and has the relevant Discounts applied.

Entitlements can be applied to Stock, Fixture and Series type products.

ENTITLEMENTS AND THE CHANNEL PRICE LISTS



The screenshot shows a web-based configuration form for a Channel Price List. The title is 'Channel Price List' and the specific list is 'Sample Series CPL - POS'. Under the 'General' tab, the following fields are visible:

- Name:** Sample Series CPL - POS
- Channel:** POS
- Variant Price List:** Series Renewal
- On Sale Date:** (calendar icon)
- Off Sale Date:** (calendar icon)
- On Sale Days Before:** 365
- On Sale Hours Before:** (dropdown)
- Off Sale Days Before:** -1
- Off Sale Hours Before:** (dropdown)
- Activity Start Date:** (calendar icon)
- Activity End Date:** (calendar icon)
- Marketing List:** IIM Test
- Priority Provider:** (dropdown)
- Discount Percent:** 50.00
- Max Quantity:** 5
- Discount Category:** (dropdown)
- Discount Rounding:** (dropdown)

The quantity of the products that a customer is entitled to, for example the amount of match tickets, is defined by using the **Max Quantity** field of the **Channel Price List**. The maximum number of a product that a customer can purchase can be entered into this field.

The **Discount Percent** field can also be completed in the **Channel Price List**, this will discount any products using the Channel Price List by the entered percentage.

Used in conjunction with the **Discount Percent** field is the **Discount Rounding** and **Discount Category** fields. The **Discount Rounding** field can be completed to round the discount amount to the entered value when at the shopping cart. The **Discount Category** only applies if a discount value is specified, it can be completed to apply a discount to a certain category of products. If products from more than one category are to get the same discount, a new separate Channel Price List will need to be created for each category.

A **Marketing List** will also need to be added to a **Channel Price List**, this will mean that only those contacts in the Marketing List will be entitled to that Channel Price List. For example, a Marketing List may hold all Season Ticket holders or Members. Therefore the fields completed in the Channel Price List such as Max Quantity and a Discount Percent will only apply to this list of customers. Therefore a Channel Price List could be created for a Marketing List that contains all Season Ticket holders, who are able to purchase a maximum of one ticket for a cup game (Max Quantity) and are applicable to a 20 percent discount (Discount Percent).



Note: It is still possible to enter a Marketing List in a Channel Price List without a Max Quantity

If a Discount Percent is added to a Channel Price List with no Marketing List, the discount will apply to all products using the Channel Price List.

If a Channel Price List has a **Marketing List** or **Discount Percent** entered but no **Max Quantity** then the Bookable Products that are to be sold by using the Channel Price List should have the Beneficiaries option set to either **Required** or **Requested**. If a Max Quantity has been entered into the Channel price List then Beneficiaries will always be required in the booking system, no matter what is set against the Bookable Product.

ENTITLEMENTS AND THE CHANNELS

In the Channel the field **Show Beneficiary Entitled User** can be set to either **Yes** or **No**. The following explains how this option controls what occurs on both the **POS** and **Web** Channel:

Show Beneficiary Entitled User No Yes

POS:-

If in the POS channel if the field **Show Beneficiaries Entitled User** is set to **Yes**, then within the **Edit Beneficiaries** screen, the **Entitled User drop down** field will appear. If set to **No** then the Entitled User drop down will not be displayed on the Edit Beneficiaries screen.

In this case the entitled user is set to the user with the entitlements from the Marketing List that has been added to the Channel Price List and the Beneficiaries drop down can be completed by any other user to obtain the preferential rate. In the example below Joe Walker is the Entitled user, whereas Tim Stimpson has been added as the Beneficiary of the product.



Note: Products with a Channel Price List that has a Marketing List added to it will only be shown on the POS if a purchaser is Added to the Order before selecting the product and they are part of the given Marketing List.

Web:-

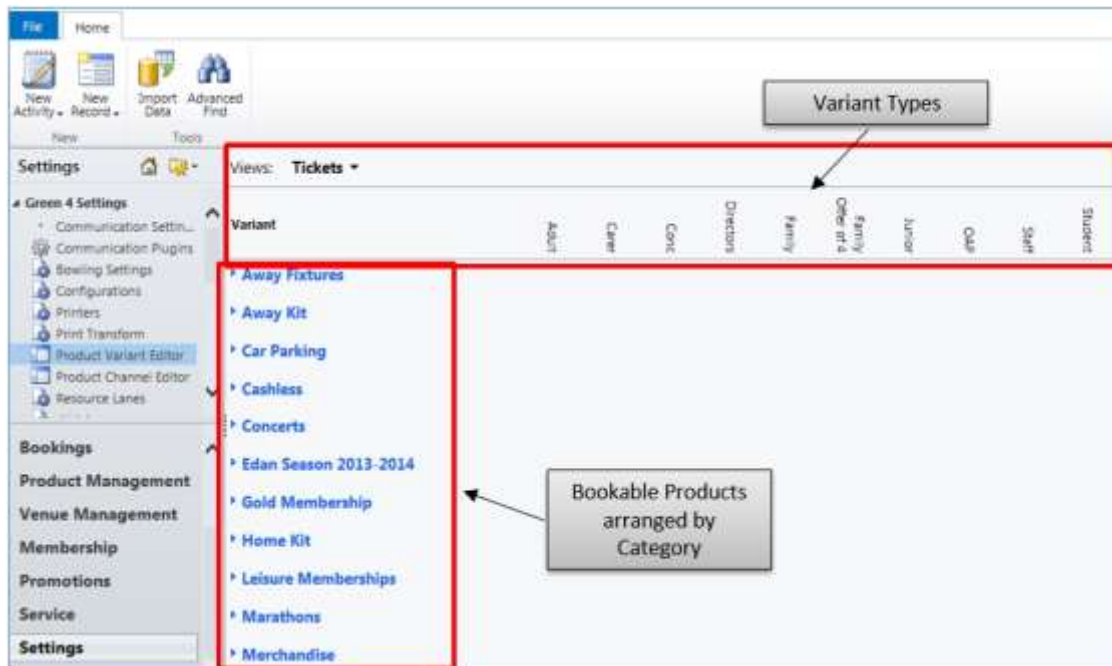
If in the WEB channel the field **Show Beneficiaries Entitled User** is set to **Yes**, when a customer logs into their account, if they are part of a Marketing List on a Channel Price List where a discount has been applied, when the product that uses the Channel Price List is selected the discount will be applied on selection of the beneficiary.

4. MISCELLANEOUS

THE BULK SET UP OF MANY PRODUCTS

The setup of Variant Types and Pricing for many products at once is done using the Product Variant Editor.

- a) In the CRM **Navigation Panel** select **Settings** followed by **Product Variant Editor**.
- b) The Product Variant Editor will be displayed:



- c) The Bookable Products will be listed down the side of the editor. The products are grouped based on product category.
- d) The Variant Types will be listed across the top of the editor. The variant types listed can be changed using the Views drop down. If the required variant type is not available for the Bookable Product, contact your system administrator to request the creation of the variant type.
- e) To set a variant type for a Bookable Product, enter a tick in the relevant checkbox.
- f) Once the details are complete select **Save** at the top of the editor.

SET UP FOR MULTI LINGUAL USING THE TRANSLATION AND DESCRIPTION FIELDS

If the website is being setup as multi-lingual the translated names and descriptions will be entered here in the following format. These translated names will appear on the website when the different language selection is made on the website.

| | | | | |
|----------------------|--------------------------------------|-----------|----------------------|--------------------------------------|
| fr-FR= | 'Product Description' – 'Price' | | en-GB= | 'Product Description' – 'Price' |
| Country/ Language | The product description and Price | Separator | Country/ Language | The product description and Price |

Example E.g. *fr-FR= Cartable Double Soufflet - €120 | en-GB= Double Gusset Briefcase - €120 - | en-ES= Cartera con dos compartimentos - €120* Description (this appears online under the product)

PRODUCT CALENDARS

The Product Calendars entity is used to determine the availability of products, for example they are used to define peak and off peak schedules.

To create a Product Calendar record:

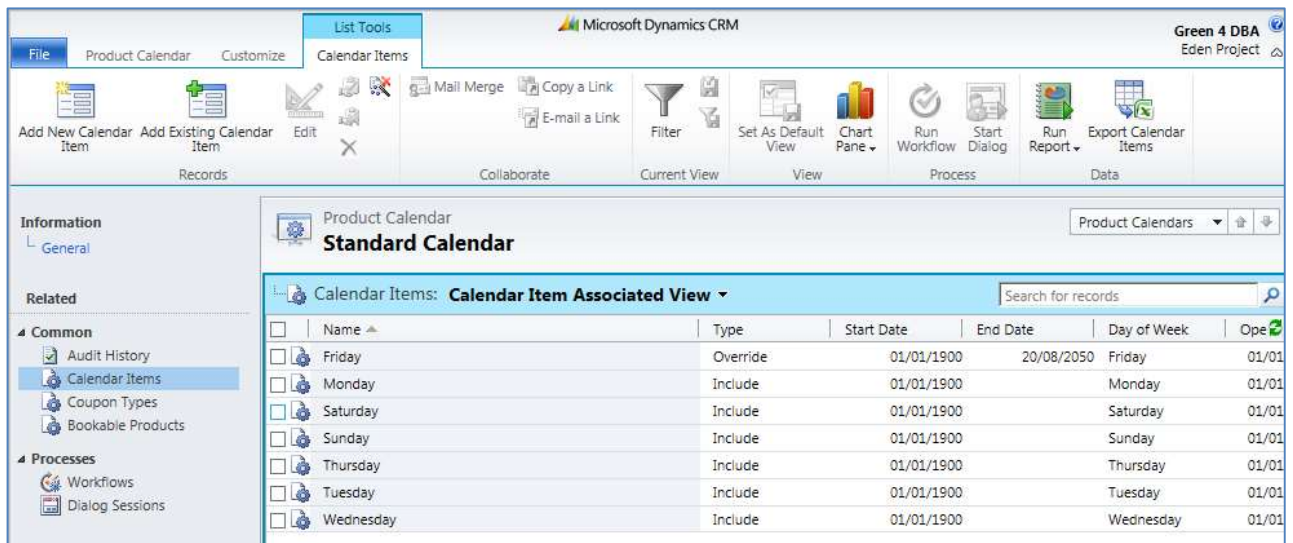
1. In the **Navigation Panel** select **Product Management** followed by **Product Calendars**.
2. The Product Calendars list view will be displayed. Select **New** on the ribbon.
3. A blank Product Calendar form will be displayed. Complete the following details:
 - **Name.** Enter a name for the calendar.
4. Once the details are complete click **Save** on the ribbon to continue.

Calendar Items

The Calendar Items entity is used to define the individual time periods (e.g. days or weeks) included in a Product Calendar. To create a Calendar Items record:

- a) Open the venue's **Product Calendar** record in the form view (see [Product Calendars](#) for details).
- b) In the **Form Navigation Panel** select **Calendar Items**.

The Calendar Items list view will be displayed:



- c) Select **Add New Calendar Item** on the ribbon.
- d) A blank Calendar Item form will be displayed:

Calendar Item
New

General

Name * [] Type * Include

Description []

Start Date * [] [] End Date [] []

Day of Week [] Product Calendar Standard Calendar

Open Time [] [] Close Time [] []

Peak Start Time [] [] Peak End Time [] []

e) Complete the following details:

- **Name.** Enter a name for the calendar item. For example if creating a standard day enter the name of the day: Monday, Tuesday, etc, or, if creating a bank holiday enter the name of the holiday, e.g. Easter Monday.
- **Type.** Use the drop-down list to select the type of calendar item. Select from:
 - i. **Include.** Select if you creating a standard calendar item, for example a normal day of the week.
 - ii. **Exclude.** Select if you are creating a holiday item when the venue is closed, for example Christmas Day.

iii. **Override.** Select if you are creating a holiday item when the venue is open, but the standard settings are to be overridden by the calendar item, for example altered opening hours on Christmas Eve.

- **Description.** Enter a description of the item.
- **Start Date.** Enter the date when the calendar item comes into effect. For example if creating an item to cover the school holidays, enter the first date of the holidays.
- **End Date.** Enter the date when the calendar item becomes obsolete. For example if creating an item to cover the school holidays, enter the last date of the holidays. If this field is left blank the item will be used indefinitely.
- **Day of Week.** Use the drop-down menu to select the day of the week. Use this option when creating the standard days of the week calendar items.
- **Product Calendar.** The product calendar the calendar item is associated with.
- **Open Time.** Enter the time the venue opens on the day(s) that are being defined.
- **Close Time.** Enter the time the venue closes on the day(s) that are being defined.
- **Peak Start Time.** Enter the start of peak time on the day(s) that being defined. This setting will be used to determine whether customers pay the peak or off peak price for bookings.
- **Peak End Time.** Enter the end of peak time on the day(s) that being defined. This setting will be used to determine whether customers pay the peak or off peak price for bookings.

f) Once the details are complete select **Save and Close** on the ribbon to continue.



Note: The above process should be used to create a calendar item for each day your venue is open. In addition you should create a separate calendar item for any day(s) that do not follow your normal opening or pricing details.