

CRM DRIVEN SOLUTIONS FOR SPORT & LEISURE

GREEN 4 TICKETING 3.6. BOOKING AND PRODUCT MANAGEMENT





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ABOUT THIS DOCUMENT

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

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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:

Bookings 🚮 🙀 -	Bookings Active Bookings *	
Bookings	Booking Referen_ Total Price	Booking Status
Booking Products	1000155 £23.50	Active
	1000156 £37.00	Active
	1000157 £23.50	Active
	1000158 £18.50	Active
	1000159 £18.50	Active
	1000160 £37.00	Active
	1000161 £37.00	Active
	1000162 £86.50	Active
Workplace	1000163 £94.00	Active
Sales	1000164-1 £37.00	Active
Manhatian	1000165 £37,00	Active
Marketing	1000166 £55.50	Active
Loyalty	1000167 £17.50	Active
Bookings	1000168 £50.00	Active

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

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:

ookings Active	Bookings •					Search for records	
Booking Referen	Total Price	Booking Status	Parent Booking	Booking Referen	Channe	H Unrefunded Val	Refund V: 3
1000000	£37.00	Active			POS	£0.00	
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.



Marketing 🛛 🙆 🙀 -		Contacts My Active Contacts -
Ceads	~	Full Name 🛦
🔛 Contacts		Abbas Khan
Harketing Lists		Abigail Rollinson
Campaigns Products		Adam McCarthy
Sales Literature		Adam Stinton
A Quick Campaigns		Adi Clark
Scommunications	~	Adrian Stukins
Communication Audiences		Adrian Turnock
Workplace	~	Adriana Kavurova
Sales		Adriana Kavurova
		Aedan Ryan
Marketing		Aidan Collins

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:

Add New Add Existing Edit	Iomize Bookings Activate Sulk Dele Deactivate Delete Booking rds	ete 🚰 Mail Merge 📆 Co 😪 E-r Collaborate
Information Contact Details Other Details Overall Summary	Contact Michael Clark	
Booking Summary Tricket Summary Hospitality Summary Merchandise Summary Communication Summary Conduct Preferences Administration Notes Conflicts Tab Related	Booking Refere Tr A 1022160 A 1019002 A 1018010 A 1018010 A 1000091	otal Price Delivery Fu (202.00 (30.00 (44.00 (58.50
Recurring Members Login Audits Loyalty Redemptions Loyalty Accounts Bookings Cramers		

- 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	DOS 🖸	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	£ 20.00	Discount Reason	Promotion:halfprice
Discount Code	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	Q	Card Details	
Refund Value	£ 32.68	Unrefunded Value	£ 0.00
Invoice Number		Emailed Operator	● No O Yes
Emailed Purchaser	● No ○ Yes	Fulfilment Status	×

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	Home	City	Leicester
Line 1	Main Street	County	Leicestershire
Line 2		Postcode	LE11AA
Line 3		Country	
Delivery Fulfilment Status	~		
Dispatch batch			

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	✓

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	ГФ гн	Q	Ticket Printed	🔿 No 💿 Yes	
Till	S2		Booking Terminal	🎄 <u>52</u>	Q
Media Code			Transaction Code		
Booking Number			Loyalty Processed	O No O Yes	
Vouchers Collected	○ No ○ Yes				

LINKED BOOKINGS

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

Linked Bookings				
Next Booking	arder 25/02/2011 12:20:14	Q	Previous Booking	
Renewed Booking				
			A.	

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.

0.5	Tints ing Refere.	finolding 2shut	Total Price
6.0	1000534	Inetthe	\$47.50
11.0	1000534-1	Attive	447.00
114	1000554-6	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 hast 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.

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1 0

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.

File Advanced Find]			STADIUM 🔺
Query Saved Results Show	New Save As Save Edit Columns Fedit Propertie	Clear (E Group AND) (E Group OR Details Query	Download Fetch XML Debug	
Look for: Bookings			Active Bookings	×
	Equals	Active		
Booking Status	Equals	Active		
Select				

- 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:

look for:	Bockings	✓ Use
8 8 8 8 8 8 8 8 8 8 8 8 8 8 8 8 8 8 8	Ids uthorisation Code noting Number pooling Number pooling Reference pooling Status pooling Status pooling Status pooling Status pooling Status pooling Status pooling Terminal and Details nannel ty pomment porfimationSent pontact putpy	Active Active

• **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.

•	Related		Active
	Activities (Reparding)	~	190
	Accordes (Regarding)	~	Active
	Booking Charges (Booking)		
	Booking Operator		
	Booking Payments (Booking)		
	Booking Products (Booking)		
	Booking Question Answer (Booking)		
	Booking System Messages (Booking)		
	Booking Terminal		
	Booking Ticket Copy Data (New Booking)		
	Booking Tickets (Booking)		

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:

Look for: Bookings		V Use Saved View:
	Equals	Active
	Equals	Active
- Channel	✓ Equals	Enter Value
Select		

i) Complete the search term using the boxes provided.

Look for: Bookings		V Use Saved View:
	Equals	Active
	Equals	Active
	Equals	👌 <u>WEB</u>
Select		

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.

File	Advanced Find	List Tools Bookings				4	Microsoft
New Booking	Edit Activate	ate	g Maii N	lerge	Copy a Lir	ink	C Run Workflow
	Records			Colla	borate		Proce
	Booking Referen	Total Price	e	Book	ing Status	Paren	t Booking
	1029701		£28.00	Activ	e		
	1029685		£36.00	Activ	e		
	1029682		£20.00	Activ	e		
	1029681		£20.00	Activ	e		
	1029680		£32.00	Activ	e		
	1029679		£44.00	Activ	e		
	1029678		£20.00	Activ	e		
AID	1029677		£36.00	Activ	e		

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:

I) 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:

Look for:	Bookings		~	Use Saved View: Active Bo
	tus	Equals	Acti	ve
★ Box	oking Status	Equals	Acti	ve
• Chi	annel	Equals	WEE	1
			~	
- <u>S</u>	at Allocations (Book	no)		
	Select			
1.00				

- 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:

look for:	Boakings		Use Saved View: Active Bookings
+ Sta	tus	Rquals	Active
• <u>Bos</u>	sking Status	Equal	Active
• <u>Ch</u>	innel	Equals	WEB
2	et		
+ <u>Se</u>	Allocations (Book)	ng)	
	Block	Equals	4. East Stand Centre Left 64-9
	Exture	Equais	NTFC vs. Manstiel C IZT
	Select		

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**.



File Advanced Find Query Saved Results Show	New Save View	Clear	Download Fetch XML Debug
Look for: Contacts		▼ Use Saved View: S	Season tickets 2013
Select			
Bookings (Contact)			
	Equals	Active	
Select			
- Booking Produ	cts (Booking)		
Select			
▼ Product Var	<u>iant</u>		
Select	A		
- Bookab	le Product		
▼ Туре	<u>Equals</u>	Series	
	es <u>Equals</u>	2013 Hot	me Season
Sele	e <u>t</u>		

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.

	_						
Looi	for	Seat Allocations			~	Use Saved View:	Number of season ticket holders in each block
	50	lett					
	- <u>Ser</u>	ries					
	٠	Series	Equals	League 2013-2014			
		Select					
ŀ	Bo	<u>xoking</u>					
	•	Booking Status	Equals	ActiveReserved			
		Select					
	•	Booking Products (Booking)					
		Select					
		 Product Variant 					
		Select					
		Bookable Product					
		▼ <u>Type</u>	Equals	Series			
		Select					

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.

Loo	k for:	Seat /	Viocations				~	Use Saved View	Number of seat moves into Block X for Fixture X
	• <u>Or</u>	iginal S	eat Allocation	Contains Data					
	• Fis	ture		Equals	Bristol	City v Crewe Alexan			
	• <u>Bk</u>	<u>ock</u>		Equals	WEDLO	CK STAND;WEDLOC_			
	Se	lect.							
	• 80	oking							
	•	Bookir	ng Status	Equals	Act	he			
		Select							
	-	<u>Booki</u>	na Products (Boo	(king)					
		54	lect						
			oduct Variant						
			Select						
		-	Bookable Prod	uct					
			■ IVDE		Equals	Fixture			
			Select						

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:

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

Contraction of the second seco		1
Query	[new]	
	System Views	1
Use Saved View:	Active Bookings	
	Inactive Bookings	
ve	My Views	
	Bookings for Fixture X	
ve		L

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



Bookings 🕼 📮 -	Bookings:	Active Bookings *
à Bookings	Book	System Views
Booking Products	10297	Active Bookings
	10297	Inactive Bookings
	10291	My Views
	10291	
	10297	
	10297	
	10297	11 £27.00 Active
	10297	10 £20.00 Active
Workplace	10297	09 £36.00 Active
Corporate Sales	10297	08 £40.00 Active
Corporate Sales	10297	07 £8.00 Active
S Marketing & eComms	10297	06 £20.00 Active
Loyalty	10297	05 £19.00 Active
	10297	04 £10.00 Active
Green 4 Integrations	10297	03 £108.00 Active
Bookings	10297	02 £16.00 Active

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:

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

Query	Saved Results	New Save	Save As Edit Columns Edit Properties	Clear	Details	Download Fetch	
Look fo	show Bookable Proc		View	~	Chiery Use Saved View:	Debug Active Bookable Products	

- c) A list of your previously saved Advanced Find results will be displayed.
- d) 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.

	List Tools			Ail Micro	osoft Dynamics C	RM
File Advanced Fin Record Set As Default View	Activate Control Control Contr	Assign Saved Views	Share Copy a Link	Run	Start Run Report	Export Saved Views
View	Records	Cal	laborate	Process		Data
🗟 Bookable Prodi	icts Saved Views: A	ctive Saved	Views •			
Name 🔺			Owner	Last Mod	dified	
f8:6			Hospitality Adr	ni 06/12/2	2013 12:59	
Retail Products			Hospitality Adr	ni. 11/05/2	2014 15:49	



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.**

Common Taska	0	Name	Read	Write	Delete	Append	Assign	Share
Add User/Team							- 2	
K Remove Selected Items								
 Toggle All Permissions of 								
the Selected herms								
Acout.								
				This rec	ord is not shared	0		
Get Help with Sharing								

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.

Look for:	User	V			
View:	User Lookup View	~			
Search	Search for records	ρ			
	Name e Powell		Main Phone	Butiness Unit Stadium Demo	
1.00	pitality Administrator			Stadium Demo	
🗌 Ge	en Dema			Stadium Demo	
Den	no User			Stadium Demo	
<					>
1-5 ef	6 (1 selected)				4 Page 1 8
A0 Rem Proper	a Demo User				
				QK	Ganoel

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**.



Common Taska	Name	Read	Write	Delete	Append	Assign	Share
Add User/Team	Demo User	R					
 Toggle All Permissions of the Selected Items Reset 							
🕑 Get Help with Sharing							

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.

Venue Setup	Planning	Puttin	g Products on S	Sale
Set up Venue, Blocks, Venue Configuration, Bookable Resources and Channels	Business planning to define products, pricing and sale dates	Set up Product Variants and Variant Price Lists	Create Sales Plans and set up Channel Price Lists	Set up the Products
Green 4 Ticketing Venue Management Not covered in this guide	Business Process Not covered in this guide		cketing Product Mana ructions included in t	•

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
		from e.g. POS, Web? The variants or types of product that will be sold e.g. Adult, Junior When the products need to go on sale Any special requirements in terms of sales and pricing e.g. early bird offers for season card holders Overall pricing strategy			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?	 Venue Blocks Venue Block Configuration Areas Seat Classes Bookable Resources Channels 	Nothing at this stage	Variations of the product to be put on sale e.g. Adult, Junior Variant Price Lists, created for pricing regimes.	Sales Plans Channel Price Lists. These need to be associated to a Sales Plan	 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 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 seriesRelated to-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	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 Related to - 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)	Needs to be set up for each new series put on sale Related to 2 Venue 2 Venue Configuration 2 Fixture 2 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)	Typically set up each time there is a new match or event.Related to-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	Can be for set durations e.g. Annual, Monthly or Weekly Can include different products



		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	Can be reused, assists with the administration of managing Channel Price Lists and Sale Dates Related to - Channel Price Lists - Series - Fixtures
Channel Price List	 The channel price list is used to manage the 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. 	Can be reused Related to - 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).

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Product Man 🕼 斗	Variant Types Active Variant Types *		
Analysis Categories	Name -	People Description	Category
Bookable Products	Adust	1	Tiskets
Fidures	Carer	1	Tickets
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Sales	Matchday Programme	1	Default
	Medium	1	Merchandise
Marketing	04F	1	Tickets
Loyalty	D Ret	1	F+8
Bookings	Size 5	1	Merchandise
18 (1997) (1997)	Small	1	Merchandise
Product Management	ita#	1	Tickets

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

Information L General Related	Variant Typ New			[Variant Types + ↑ ↓]
Common Audit History Audit History Promotions Variant Type Compon	Name * Translated name Description	1	People *	
Product Variants Coupon Products Processes Workflows Dialog Sessions	Skillata Cass Code Voucher Value Sequence	£	Category Tariff Code Conversion Factor	A

- 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. <u>See the Set up for Multi Lingual using the Translation Field</u>

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- **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 <u>Variant Type Components</u> 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:

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



File Variant Type Add C	ustomize Variant Type Components					Stadium De	imo a
Add New Variant Type Edit	Mail Merge 👫 Copy a Link	Filter	Set As Default View Chart Pane -	Run Workflow	Run Report - Export Variant Typ Components	æ	
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Related	- Variant Type Componen	ts Variant T	ype Component As	sociated View -	1		Q
Common Audit History Promotions Variant Type Compon Product Variants Coupon Products	Name 🔺		Part of Var	iant T Quantity	Variant Type	Created On	0
Processes Workflows Dialog Sessions		No	Variant Type Component	records are available	in this view.		

- 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:

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Common Audit History	* General Name*	/ 460	ж	Part of Variant Type	a family Offer of 4	
Processes Workflows Dialog Sessions	Quantity*	2		Variant Type *	(à Aduit	

- 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:

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Product Sessions Reservations	CP Series 2	CP Series 2014-15			
à Series	Cup Match	Cup Match			
👌 Variant Price Lists	CUP PRICE	IST		Active	
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Product Management	f+b			Active	
	Matchday I	Matchday Prices			
Venue Management	Matchday 1	Ticket		Active	
Membership	Membersh	ip (14) Early Bird		Active	
Promotions		ip (14) Standard		Active	
Service	POS - Mate	thday		Active	
Service	retail			Active	

- 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 <u>Entitlements</u> 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
 - o Discounts automatically applied to purchases members make
 - Early purchase offers for a specified audience
 - o 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.

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

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Processes Workflows Diatog Sessions			

- 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.



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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 <u>Examples: Using Sales Plans to set up a Series and Fixtures</u> 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.

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

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Related	4 General			
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	Off Sale Days Before		Off Sale Hours Before	
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	Sequence			

- 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 <u>Using Sales Plans to set up a</u> <u>Series and Fixtures</u>.

• 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 <u>Using Sales Plans to set up a Series and Fixtures</u>.

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- **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 <u>Using Sales Plans to set up</u> a <u>Series and Fixtures</u>.
- 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 <u>Using Sales Plans to set up a Series</u> 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 singal Sales Plan, so therefore the above steps can be repeated for each Channel-Variant Price List that is to be availuable on your system.



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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:

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

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- 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 <u>Step 1</u>
- 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.

- d) Once the details are complete, select **Save & Close** on the ribbon.
- e) 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.
- f) 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:

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



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- 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:

Fixture One	Titures • 🕈
- Notes	
Add a new mith.	
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fiel flature Ault (pg 18.220 0/(e)))	

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.

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



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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:



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- 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 <u>Step 3</u> 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.

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- 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.



- I) 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:

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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 <u>see the Set up for Multi</u> <u>Lingual using the Translation Field</u>.
- **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). <u>See the Set up for Multi Lingual using the Translation and Description Field</u> 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 <u>Step 4.</u>
- **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.



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Variants & Pricing Bowling Notes	Variants & Pricing Mandatory Not for Sale
Common Activities Closed Activities Audit History Additional Products	Variant Variant Type

• 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.

Variants & Pricing					l
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East 2013 (Senior Season)				1	Existing Variant Price Lists
East 2013 (Student Season)					
East Stand 2013 (Former Players Season)				1	

- 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; <u>Step 3: Create the Fixtures</u> 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:

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.

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

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- 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 <u>Examples: Using Sales Plans to set up a Series and Fixtures</u> 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.

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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 <u>Using</u> <u>Sales Plans to set up a Series and Fixtures</u>.
- 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 availuable on your system.



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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 <u>Section 3.6 Placing a new Fixture on sale</u>, 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 <u>Steps 1</u> with a linked Channel Price List (<u>Steps 2</u>) 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 <u>Step 5</u> 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:

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- 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 <u>Step 1</u>.
- 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; <u>Step 3: Create the</u> <u>Fixtures</u>.

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.



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/
V à Leaguel	Yes	01/02/2013 00:00	01/
V à League 2	Yes	02/02/2013 00:00	02/
V & Lengue 3	Yes	03/02/2013 00:00	03/
C & League 4	Yes	04/02/2013 00:00	04/
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* 1 - 12 of 12 (5 selected)		l€ € Pa	gei Þ
Selected records:			
Add 👌 League 1 👌 League 2 👌 Leagu	ie 3 👌 League 4 👌 Leag	ue 5	

- 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.



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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:

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Count Protett	Analy	131.000	**	0.78		Volume Vest Days		
Direction .	L 191	en Ty			(3)	Talut scoling the	# 74 (D 76	

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 <u>see the Set up for Multi</u> <u>Lingual using the Translation Field</u>.
- **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). <u>See the Set up for Multi Lingual using the Translation and Description Field</u> 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.



Save & New Save & Deactivate Close & Delete Save	Sharing - Copy a Link Collaborate Process Data
Information General Channels	Bookable Product test
Variants & Pricing Bowling Notes Related	Variants & Pricing Mandatory Mandatory
Common Activities Closed Activities Audit History Audit History	Variant

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 <u>Step 2</u> that has both the Channels and Channel Price List selected here linked to it.

ariants & Pricing				
	Not for Sale	Mandatory Varians	Match Day NEW	
East 2013 (Adult Season)				2
East 2013 (Junior Season)				λ
East 2013 (Senior Season)				Existing Variant Price Lists
East 2013 (Student Season)				
East Stand 2013 (Former Players Season)				

- 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:

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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**.

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- 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:

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



- c) Select **New** on the ribbon (highlighted above).
- d) 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.

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

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Destination Folder			
Latitude	Longitude		



- 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.

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b) Select Add New Block on the ribbon.



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	No seat (shite)	• •						,

- 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.



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+ Processes	Access Control					
Ga Workflows	Primary Provider	Skidete	_	Perimeter Provider	a feedback	a
Dialog Sessions	* Notes					
	- Holds					

- 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.

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File Block Add Custor	nize Venue Configuration Blocks					
Add New Venue Configuration Add Block	Existing Venue Configuration Edit	3	Filter	Set As Default View	Chart Pane +	Run Workfie
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Processes Workflows Dialog Sessions						

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

fte Venue Configuration Block	Add Cultorite		🧀 Microsoft Dyn	amics CRM		CRM2011 Admin Stad	istrator 🕗 lumTest 🚓
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- 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 <u>Section 3.5 Placing a new fixture on sale</u>. 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	For each away fixture, create a fixture record. The fixture should be linked to the series created in the previous step
	Please Note. Unlike a standard home fixture the following fields must be completed for an Away fixture:
	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	A new series must be created to hold all the away fixtures. For example it could be named Away Fixtures 2014/15.
	Ensure that the following are completed:
	• 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	Create a fixture type Bookable Product to represent the tickets on sale for away fixtures. Ensure the following are completed:
	• 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	Using the Bookable Product form, select the channels the away product will be sold via.
Bookable Product – Variants	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



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.



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Add New Away Beak	**	Mat Merge	Antige Away Boots Column	in they in Converse in Section	M-2 - 3	ill id	Set As Default	Churt Faite	Sector North			Licent Aver Books
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c) Capture the Away Block name for the Away Fixture.

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Save & New X Delete	Assign Copy a Link Collaborate	Run Workflow Dialog Process	Run Report + Data				
Information General Notes	Away Block New					Away Blocks	* † •
Common Audit History Seat Allocations	Name* E Area Name	Slock C		×	Owner * Fixture *	 Hospitality Administrator Bristol Rugby vs Green 4 (away) 	a
Processes Workflows Dialog Sessions	Notes						

Setting up Fields in POS

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

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- 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

File Channel Add	Cust	omize						Stadium	Dema 🚕
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Information - Bowing Settings - Tabs		Channel POS						Channels	- † +
– Settings – General		Open Till	No	O Yes	Close Booking if paid	No	⊖ Yes		-
Related		Refund Authorisation Required	O No	Yes	Validate Delivery Product	No	O Yes		
4 Common		Contact							
Activities Closed Activities	^	Allow Bulk Email	() No	• Yes	Collect Referred From Attribute	No	O Yes		
Audit History		Terms Acceptance Required Behaviours	O No	⊖ Yes	Activation Require	d 💽 No	() Yes		
 Booking Questions Additional Charges Bookings 		Offer Additional Products	O No	• Yes	Return Stock Level	5 () No	O Yes		
👌 Channel Sale Dates		Do not create stock transactions	() No	O Yes					
Menu Boards		Away Tickets							
 Booking Questions Payment Methods Operator Groups 		Away Ticket Details To Record	g4b_Ticke	tReferenceNumber,g4b_awa	syblockid.g4b_rt				

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 <u>Section 3.2.</u>
- 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 <u>Section 3.3.</u>
- 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 BOOKABALE 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:

- a) On the CRM navigation panel, select **Bookable Products** on the **Product Management** tab.
- b) 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 <u>Set up for Multi Lingual using the Translation</u> <u>Field</u> 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). <u>See the Set up for Multi Lingual using the Translation and Description Field</u> 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.

File Bookable Product Ad	d Customize
Save	Collaborate Process Data
Information - General - Channels - Variants & Pricing - Bowling	Bookable Product test Variants & Pricing
Related	Not for Sale Variant
Activities Closed Activities Audit History Additional Products	

- 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):

Va	riants & Pricing				-	\sim	r	~
		Code	Not for Sale	Mandatory Variant	Peak Price	Off Peak Price	- Anno	•
	Mens T Shirt (Large)				40.00	40.00		
0	Mens T Shirt (Medium)	[40.00	40.00		
8	Mens T Shirt (Small)				40.00	40.00		

- 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:

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



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

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Add New Additional Add Existing Ad Product	iditional Edit	2 K 2 4 2 4 2 4	🚰 Mail Merge	영울 Copy a Link 영국 E-mail a Link	Y Fiter
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Related	D Name -				Bena
Common Adsettes Addettes Audt Hiday Audt Hiday Addetanal Products Product Dannets					

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

		At Microsoft Dy	namics CRM		CRM2011 Administrat STADIL	tor 🖤
Additional Product	and the second s	in Start Now Dialog Report.			30404	AM 60
Information General Notes	Additional Pr New	oduct			aduttional Product * 4	
Common Activities Duolog Sections	Name* Additional Proto Product Analysis Category Proto product • Notes			Bookable Product Behaviour Quantity Behaviour	League & Cup - Fisture - Standard	

- 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.

Behaviours		
Offer Additional Products	C No	Yes

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 <u>Section 3.3.</u>
- 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	No	🔿 Yes
Number Read Only	U	Ŭ

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



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



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

Membership Number Auto	⊖ No	Yes
Generated		

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 <u>set up for Multi</u> 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). <u>See the Set up for Multi Lingual using the Translation and Description Field</u> 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 <u>Product Calendars</u>.
 - 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.

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- 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.

Bookable Product Ad	d Customize
Save & New Save & Close & Deactivate Save Save	Sharing - Copy a Link Collaborate Process Data
Information General Channels	Bookable Product test
Variantes Variants & Pricing Bowling Notes	▼ Variants & Pricing
Related	Not for Sale Variant
Common Activities Closed Activities Audit History Additional Products	Variant Type

• 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):

ariants & Pricing							
				default	~	 ~	
	Code	Not for Sale	Mandatory Variant	Peak Price	Off Peak Price		
Standard Leisure Membership (Adult)				45,00	45.00		
Standard Leisure Membership (Junior)				35.00	35.00		
	V O						

- 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.

ENTITLEMETNS AND THE CHANNEL PRICE LISTS

Channel Pri Sample S	ie List Series CPL - I	POS				Channel Price Lists	++++
4 General							
Name*	Sample Series CPI	L - POS					
Channel	A POS		12	Variant Price List	Series Renewal		
On Sale Date		10 v	6	Off Sale Date		10v	10
On Sale Days Before	365			On Sale Hours Before			
Off Sale Days Before	.t			Off Sale Hours Before			
Activity Start Date		11R.M	125	Activity End Dete			
Manveting List	11M Test			Priority Provider	1		Ā
Discount Percent	50.00		-	Max Quantity	5		
Discount Category			172	Discount Rounding			

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:



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.

Stimpson joe walker	-	Add En	dit Photo er]	Seat	Can	u u	Hide	
Title	Mr	First Name	Tiel		Last Name	Stimpson		
Address I	Tigers Way	Postcode	(e793%)		Email	Stime-o@g2.com		
Birthdate	17/02/1978	Mobile	6781312443	1 C				
	<u></u>							



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'	l	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:

File Product Calendar C	List Tools ustomize Calendar Items		oft Dynamics CRI	M				en 4 DBA 🧯 en Project 🖉
Add New Calendar Add Existing C Item		Mail Merge Copy a Link	Filter	Set As Default View	Chart Pane + Workflow	Start Run E Dialog Report -	Export Calendar Items	
Records		Collaborate	Current View	View	Proce	iss in the second se	Data	
Information	Product Cal	endar d Calendar				Pr	oduct Calendars	 ★ ⊕
L General			ated View 🔻			Search for rec	ords	0
Related		ms: Calendar Item Associ	and a second second second	pe	Start Date	Search for rec	ords Day of Week	م Ope 2
Related	La Calendar Ite		ту	(200-2)	Start Date	End Date	Day of Week	1.500
Related Common Audit History Calendar Items	Calendar Ite		Ty O	pe	1 50507 5 525 1	End Date 20/08/2050	Day of Week	Ope 2
Related Common Audit History Calendar Items Coupon Types	Calendar Ite		Ty Ov Inc	verride	01/01/1900	End Date 20/08/2050	Day of Week Friday	Ope 2
Related Common Audit History Calendar Items	Calendar Ite		Ty Ov Inc	pe verride clude	01/01/1900 01/01/1900	End Date 20/08/2050	Day of Week Friday Monday	Ope 2
Related Common Audit History Calendar Items Coupon Types Bookable Products Processes	Calendar Ite		Ty Ov Inc Inc	rpe verride clude clude	01/01/1900 01/01/1900 01/01/1900	End Date 20/08/2050	Day of Week Friday Monday Saturday	Ope 2 01/01 01/01 01/01
Related Common Audit History Calendar Items Coupon Types	Calendar Ite		Ty Ov Inc Inc Inc	rpe verride clude clude clude	01/01/1900 01/01/1900 01/01/1900 01/01/1900	End Date 20/08/2050	Day of Week Friday Monday Saturday Sunday	Ope 2 01/01 01/01 01/01 01/01

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

Calendar Item			Calendar Items 👻 🛊 🗣
▼ 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.

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- **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.