CRM Driven Solutions for Sport & Leisure

GREEN 4 TICKETING

POS USER GUIDE

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ABOUT THIS DOCUMENT

This document describes the functionality available in Green 4 Ticketing and how to use them. It is intended for all customers using Green 4 Ticketing.

> **Note:** The functionality and screens described in this guide may differ in your instalment of Green 4 Ticketing depending upon the configuration settings used by your organisation. For more information contact your System Administrator.

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DOCUMENT CONTROL

Version	Date	Change	Initials
3.2	19/02/2013	Updated for version 3.2	MR
4.0	07/08/2014	Updated for version 3.6	CP
4.1	11/08/2014	Updated internal QA review MR	CP

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LOGGING IN

To start using the Green 4 Ticketing system it is first necessary to log in using your unique pin. Using your pin to log in ensures that your sales are attributed to you.

> **Note:** If you have not been issued with a pin for the Green 4 Ticketing system, contact your line manager.

To log into Green 4 Ticketing:

1. Double-click the **Green 4** icon on the desktop:

2. The Green 4 Ticketing Login Screen will be displayed:

3. Enter the following details:

   - **PIN.** Enter your unique pin. If the onscreen keyboard has been activated for the terminal, the keyboard will be displayed when you click into the PIN field allowing you to enter your login details without the use of standard keyboard. Alternatively, the manual login can be bypassed if you have a valid Dallas Key.

   - **VENUE.** Check the correct venue is displayed. To change the venue, select the arrowhead (highlighted above) to open the drop-down list. Select the appropriate venue in the list to continue.

   - **Channel.** Check the correct channel is displayed. To change the channel, select the arrowhead (highlighted above) to open the drop-down list. Select the appropriate channel in the list to continue.

4. Select **LOGIN** to continue.

5. If the details entered are correct the Green 4 Ticketing Booking Screen will be displayed. If, however, you have entered incorrect details the login screen will be re-displayed allowing you to try again.

BOOKING SCREEN

From the Booking screen you can create a new ticket booking.

The Booking screen is divided into a number of functional areas, each of which is described in detail in the following sections:

1. Tab Headings

2. Menu

3. Shopping Cart

TAB HEADINGS

On the left hand side of the Booking screen there are a number of headings, which when selected allow you to move to different areas of the Green 4 Ticketing application.

The headings available are:

- **Current Booking.** Select to make a booking. By default, this tab will be displayed when the Green 4 Ticketing application is first opened. From the Current Booking screen the following options are available:

  - **Fixture.** Select if the customer wishes to buy a ticket(s) for a single fixture. The fixture option is only displayed if there are fixtures available for sale via the channel.

  - **Series.** Select if the customer wishes to buy a season ticket(s). The series option is only displayed if there are series products available for sale via the channel.

- o **Other.** Select if the customer wishes to purchase an item other than match or season tickets, for example merchandise. The other option is only displayed if there are fixtures and/or series products for sale via the channel.

- **Find Booking.** Select to search for an existing booking.

> **Note:** If you have a barcode scanner attached to the terminal, scanning a customer's details will automatically bring up the details of the booking.

- **Find Seat.** Select to search for the details of a booking using either the seat number or ticket number.

- **Tabs.** Displays any tabs that are currently open.

- **Customer.** Select to search for an existing customer.

- **Coupon.** Select to redeem coupons.

- **Cashless Accounts.** Used to manage cashless accounts.

- **Other.** Select to access the Green 4 Ticketing additional functionality, for example the ad-hoc print option.

MENU

Above the Shopping Cart a number of menu options are available.

| Cash Skim | Till Report | Open Till | LOCK | Logout | Home | Back |

The menu options available are:

- **Cash Skim.** Use to enter details about a removal of money from the till.

- **Till Report.** Use to print out the details of the till activity for the current shift.

- **Open Till.** Use to open the till drawer (if integrated).

- **Lock.** Select to lock the Green 4 Ticketing terminal. When the terminal is locked you will need to re-enter your pin to restart using Green 4 Ticketing. Any bookings that are in progress will be available when you log back into the terminal. You should use this option if you are leaving the terminal unattended.

- **Logout.** Select to log out of Green 4 Ticketing. If you have any bookings open you will be asked to save or discard the details before you log out.

- **Home.** Select to return to the Green 4 Ticketing home page. The Current Booking tab will be displayed listing all of the booking categories available.

- **Back.** Select to return to the previously viewed screen.

SHOPPING CART

The shopping cart is used to display the customer's planned purchases.

In addition to adding goods and paying for purchases, a number of additional functions are available from within the shopping cart:

> **Note:** Some of the options detailed in this guide may not be available on the terminal you are using. For more information contact your Line Manager.

- **Select Customer.** Use to assign an existing customer to the shopping cart. See Using an Existing Customer for more details. This option can also be used to add a new customer to the system, see Creating a New Customer for more details.

- **Delete.** Use to delete the selected row from the shopping cart. See Deleting Items from the Shopping Cart for more details.

- **Discount and Promos.** Select to display a list of promotions and discounts that have been applied to the shopping cart.

- **Beneficiaries.** Use to add the details of the beneficiaries of the booking. See Adding Beneficiaries for more details.

- **Add Comment.** Use to add a comment or note to the booking. Comments should be typed directly into the text box provided.

- **Promotion.** Use to add promotions to the shopping cart. See Adding Promotions for more information.

- **Close.** Use to close the shopping cart. If the current purchase has not been completed a message will be displayed asking you to confirm your actions. If you wish to abandon the shopping cart and lose the details entered select **Confirm**. To return to the shopping cart select **Cancel**.

- **Print Wizard.** Select to print the receipt (if configured) or tickets listed in the shopping cart. See <u>Printing Tickets</u> for details.

- **Print Tickets.** Select to print the tickets. This button is enabled when tickets are in the cart ready for printing and a dedicated printer is set up.

- **Add Payment.** Use to add payments to the shopping cart. See <u>Taking Payment</u> for more details.
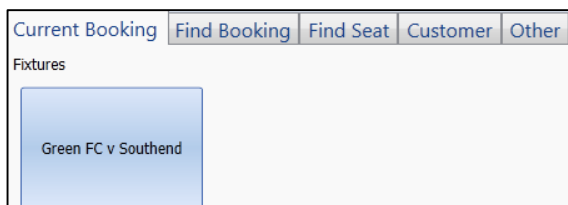
MAKING A BOOKING

The following sections will guide you through the process of taking a booking using the Green 4 Ticketing system. The process is divided into five steps:

1. Selecting the ticket option.

2. Entering the customer's details.

3. Entering a beneficiary's details.

4. Taking payment.

5. Printing Tickets.

SELECTING THE TICKET OPTION

The first step when taking a booking is to select the correct ticketing option:

1. On the Current Booking tab, select the appropriate option:

   - **Fixture.** Select to make a booking for a single match.

   - **Series.** Select to make a booking for a season ticket.

   - **Other.** Select to make a booking for an alternative product, for example a match programme.

2. The options available for the selected product type will be displayed. For example, if fixture is selected, all of the available matches will be listed as shown below:
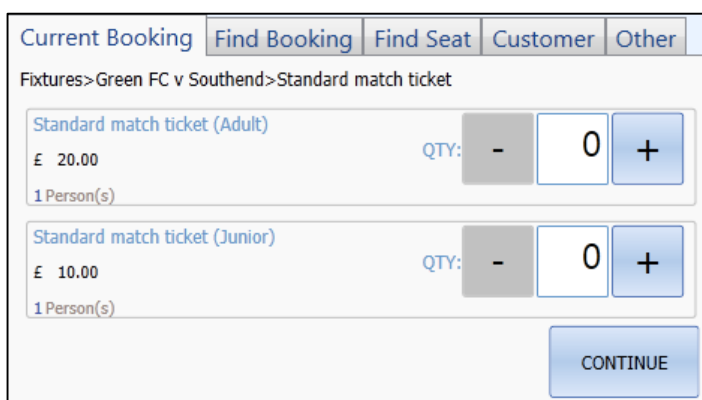

3. Select the required product, for example the fixture.

4. Select the required ticket type, for example standard ticket.

5. The Tickets Required panel will be displayed allowing you to enter the customer's requirements:

6. Enter the number of tickets required for each product listed. The number of tickets required can be updated using either the **+** and **–** buttons, or by typing directly into the box provided.

7. Once the customer requirements are complete, select **Continue**.

8. The Seat Picker screen will be displayed:
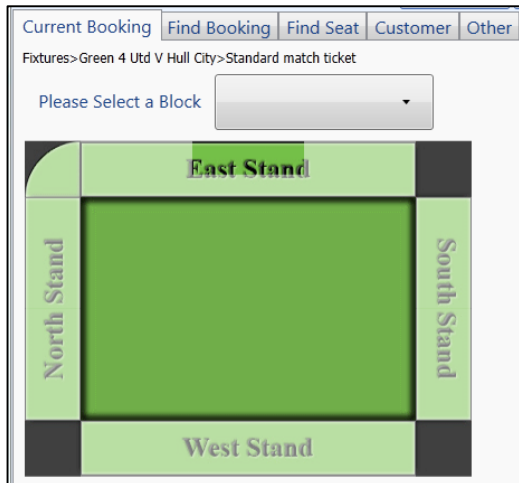
9. Select the block the customer wishes to be located in either using the drop-down list or by clicking on the stadium image (if available).

10. If the booking is being made for an **Away Game** and the capture of a mandatory pre-defined Block has been set up for the fixture, select the block from the drop down list. Select **Add To Cart**.

11. If the selected block is not seated, you will be automatically forwarded to the shopping cart, where the customer's requirements can be reviewed and paid for. However, if the selected block is seated, the seat picker will be displayed:
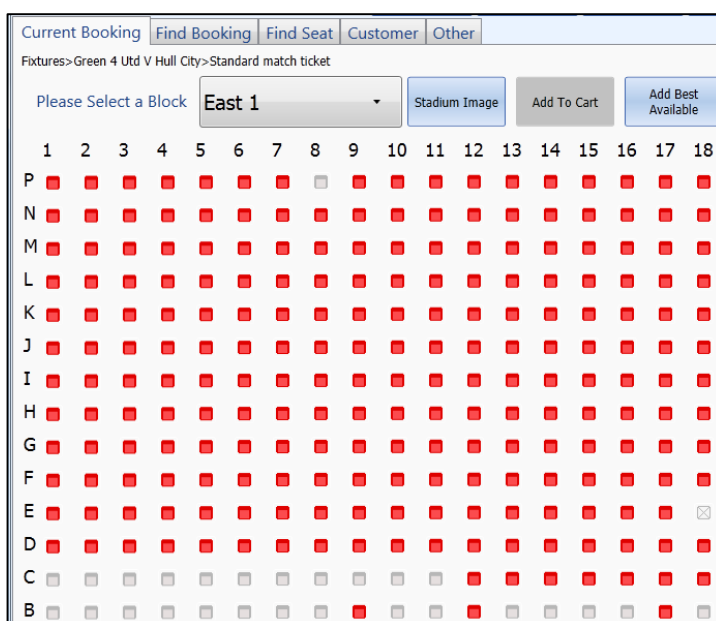
12. The following colours will be used to illustrate each of the seats available within the block:

- **Red.** Available seats.

- **Grey.** Unavailable seats (i.e. taken by another customer).

- **Crossed.** Not available for product type selected.

- **Yellow.** Currently selected seats.

- **Blue.** Only used for series ticket purchases. Indicate that the seat is not available for all fixtures in the series. When the seat is selected the fixtures that are unavailable will be listed. This option will only be available when your system is configured to allow partial series. See Partial Series Sales for more details.

13. To select seats click on the appropriate red seats. To pick multiple seats in a row, hold the shift key down when selecting the end seats required. Alternatively select **Add Best Available**, which will automatically select the best available seats in the selected block and transfer you to the shopping cart to complete the purchase. Note, when you hover over a seat the row and seat number will be displayed.

14. If you have manually chosen seats, select **Add to Cart** once your selections are complete. Note, the **Add to Cart** button will only be enabled once you have selected the correct number of seats.

15. The Shopping Cart will be displayed showing the details of the customer's purchase. You can continue to add additional items to the cart as described above (i.e. the customer can purchase tickets for more than one match at a time).

16. Once the shopping cart contains all of the items required by the customer, continue to the next stage of the booking process: Entering the Customer's Details.

Note: For more information about using the shopping cart see Shopping Cart – Additional Functionality.

MAKING A BOOKING FOR AN AWAY GAME

If the booking is being made for an away game and the Away Venue Configuration has been set up in CRM, Block, Row, Seat, Seat Letter and Reference No. information can be captured for each beneficiary when making the booking. The booking process will be the same as for other bookings except for the following:

1. If Away blocks have been set up in CRM, you will be prompted to select the relevant block when making the booking.

2. When adding beneficiary details, additional fields will be available on the Edit Beneficiary screen:

    a. Block – depending on set up this will be a free format field or a drop down

    b. Row, Seat, Seat Letter and Ref No. will be free format and not mandatory

3. Complete away block and seat information for each beneficiary.

4. Select **OK.**

5. Select **Add Payment** and continue with taking payment for the booking.

ENTERING THE CUSTOMER'S DETAILS

Once the shopping cart details are complete you can optionally assign a customer to the booking. Two options for assigning a customer to a booking are available:

- Use an existing customer.

- Create a new customer.

USING A BARCODE SCANNER

If you have a barcode scanner attached to the terminal and the customer has an existing ticket, scanning the ticket will automatically add the customer details to the booking.

USING AN EXISTING CUSTOMER

Note: Customer details can be added as part of the payment process.

To use the details of a customer who already exists within the system carry out the following:

1. At the top of the shopping cart select the **Select Customer** button:

2. The Customer screen will be displayed:

3. Enter one or more of the following details about the customer:

- **Email.** Enter the customer's email address. The address entered must exactly match the entry held in the system.

- **Customer Ref.** Enter the customer's unique reference number.

- **First Name.** Enter the customer's first name. It is not necessary to enter the customer's full name, for example entering Ste will find Steve, Steven, Stephen, etc.

- **Company.** Enter the customer's company (if a corporate customer). It is not necessary to enter the full company name.

- **Surname.** Enter the customer's surname. It is not necessary to enter the customer's full name, for example entering Rob will find Robinson, Roberts, etc.

- **Post Code.** Enter the customer's postcode. It is not necessary to enter the customer's full post code.

4. If you wish to include customers that have been added as beneficiaries select the **Product User Bookings** check box.

5. Once you have entered one or more search terms, select **Search Customer**.

6. Any records found to match the search term entered will be listed below the search terms:

7. If the correct customer appears in the list, select **Add to Order** alongside their details.

8. The shopping cart will be re-opened with the customer's name displayed at the top.

9. If the customer's details cannot be found, their details can be added to the system as described below.

CREATING A NEW CUSTOMER

To create a new customer:

1. At the top of the shopping cart select the **Select Customer** button:

2. The Customer screen will be displayed:

3. Carry out a customer search (as described above) to ensure the customer's details have not been previously added to the system.

4. To add new customer details, select **Add Customer**.

5. The Customer Details screen will be displayed:

6. The Customer Reference field will be auto populated when **OK** is selected.

7. Enter the requested details, ensuring that all fields marked with bold text are completed.

Note: If you have postcode lookup enabled for Green 4 Ticketing you can enter the individual's address by entering the customer's postcode before selecting **Lookup**. Pick the appropriate address from the list of addresses returned.

8. Select **OK** to confirm the details.

9. The Customer screen will be re-opened displaying the newly added customer. Select **Add to Order** alongside the customer's details to continue.

10. The shopping cart will be re-opened with the customer's name displayed at the top.

ENTERING THE BENEFICIARY'S DETAILS

Once the customer's information has been collected you will be prompted to capture beneficiary details. These are the individuals who will be using the tickets. When **Add Payment** is selected, the screen below will appear. Alternatively:

1. Select **Beneficiaries.**

2. The Edit Beneficiaries screen will open.

3. Complete the beneficiary details for each ticket listed, the name of the customer making the booking will be available in the drop down list and can be assigned as a beneficiary of the ticket.

4. If a different contact is to be assigned as beneficiary of the ticket, select **Add.**

5. Enter the beneficiary's First Name, Last Name and select **Search.**

6. If the beneficiary does not exist in the database select **Add** and enter in the contact details.

7. Select **OK** to return to the Edit Beneficiary screen.

8. **Select OK** to complete the entry of beneficiaries.

9. **Select Beneficiaries** to make any changes to the beneficiary information captured.

10. **Select Add Payment** to continue with taking payment for the booking.

Note: Collection of beneficiary information will depend on the set up of the Bookable Product in CRM. There are three settings, Required, Requested or Not Required. If the setting is Required, it will be mandatory to collect this information. If a beneficiary is On Hold, an alert will be generated and the sale cannot proceed.

TAKING PAYMENT

Once the shopping cart details are complete you can take payment for the booking:

1. Select **Add Payment**.

Note: If a cash account has been set up for the terminal the Speed Checkout option will be available. This option does not collect name and address details. This option should not be used for tickets that require beneficiary details.

2. If you have not added a customer's details to the order, the Edit Purchaser dialog will be displayed. The Edit Purchaser dialog can be used to:

   - Add an existing customer to the booking.

   - Create a customer record.

   - Give a reason for not adding a customer's details to the booking.

3. Complete the required action before selecting **OK**. See the Edit Purchaser Dialog section for more details.

4. If the multiple addresses functionality is enabled you will be prompted to select the delivery address for the purchased products. See Selecting Delivery Addresses for more information.

5. If a product included in the shopping cart is set to require or request beneficiaries, the Edit Beneficiaries dialog will be displayed. Complete the required information before selecting **OK**. See Adding Beneficiaries for more information about adding the details of beneficiaries.

6. The Payment Method screen will be displayed:

7. Select the appropriate option to continue.

8. The relevant payment screen will be displayed. Complete the requested information.

⚠️ **Note:** The payment options available to you will depend upon your system configuration and may differ to those shown above.

9. Once the payment details have been completed, select **Pay** to continue.

10. The shopping cart will be updated to show the amount paid (and the outstanding balance if applicable):

Total Price	£100.00
Cash Payment	£20.00
Chip and Pin Payment	£50.00
Total to pay	£30.00

11. If the full balance has not been paid, select an alternative payment method to complete the purchase.

Once full payment has been taken, you will be ready to proceed to the next stage of the booking process: Printing Tickets.

⚠️ **Note:** If you are not printing tickets immediately, but instead using the ad-hoc batch printing option (see Batch Printing) click **Close** to complete the booking.

EDIT PURCHASER DIALOG

The following sections describe how to use the Edit Purchaser dialog to:

- Search for an Existing Customer

- Edit an Existing Customer's Details

- Create a Customer Record

- Complete a Booking without Selecting a Customer

Search for an Existing Customer

To search for a customer using the Edit Purchaser dialog:

1. Using the Edit Purchaser dialog enter the customer's **First Name** and/or **Last Name** before selecting **Search**.

2. Any customer records matching the search criteria entered will be listed in the Previous Users dialog:

3. Select the correct customer from those listed. The Edit Purchaser dialog will be re-displayed showing the customer's details:

4. Select **OK** to continue with the payment.

> **Note:** If the search criteria entered returns too many customer records, an error message will be displayed stating too many customers have been found. Select **OK** to close the message. Use the Edit Purchaser dialog to modify the search terms entered to reduce the number of records returned, for instance enter both a first name and surname.

Edit an Existing Customer's Details

To edit a customer's details using the Edit Purchaser dialog:

1. Search for the customer details as described above.

2. Once the customer details are displayed, make the necessary changes to the information held using the Edit Purchaser dialog.

3. Once the modifications are complete, select **OK**.

4. The Customer Details Have Changed message will be displayed. Select **OK** to save the changes and continue to the Payment Method dialog.

Create a Customer Record

If the customer's details do not exist in the database, it is possible to create a new user record using the Edit Purchaser dialog:

1. Search for the customer details as described above.

2. If the customer's details do not appear in the list of previous users, select **Cancel** to close the list and return to the Edit Purchaser dialog.

3. Complete the customer's details, ensuring all mandatory fields (marked by bold text) are completed.

4. Once the details are complete select **Add**.

5. Once the details have been saved, you will be able to continue with the payment.

Complete a Booking without Selecting a Customer

On occasion it is necessary to create a booking without adding a customer's details, for example during busy periods or when the customer refuses to give you the necessary information. To create a booking without adding a customer's details:

1. On the Edit Purchaser dialog use the **Reason for No Purchaser** drop-down list to select the reason why no customer details are being supplied for the booking. Options include **Child**, **Too Busy** and **Refused**.

⚠️ **Note:** An additional Reason for No Purchaser option of **Offline** is automatically assigned to bookings made in offline mode. This option cannot be selected using the Edit Purchaser dialog.

2. Select **OK** to continue with the payment.

⚠️ **Note:** Bookings without a purchaser attached can be found using the Booking Reference via the Find Booking tab.

SELECT DELIVERY ADDRESS DIALOG

The Select Delivery Address dialog will be displayed if your system has been configured to allow purchasers to have multiple addresses. Using the Select Delivery Address dialog you can:

- Select the delivery address to use

- Edit a customer's address

- Add a new customer address

- Skip adding an address

Name	Street	City	County	Postcode			
Home	115 High Road	Leicester	Leics	LE1 1AA	Edit	Add to Order	
Work	Green 4 Solutions Midland Court	Lutterworth	Leics		Edit	Add to Order	

Add Address | Skip | Cancel

Selecting Delivery Address

To select an address to use:

1. Select the **Add to Order** button alongside the appropriate address.

2. The payment process will continue.

Editing an Address

To edit a customer's address:

1. Select the **Edit** button alongside the appropriate address.

2. The Edit Address dialog will be displayed. Complete the required information before selection **OK** to continue.

> **Note:** If post code lookups are enabled for your system you can find the customer's address by entering their post code before selecting **Lookup**. Pick the appropriate address for those listed.

3. The Select Delivery Address dialog will be redisplayed allowing you to select the address to use for the order.

Adding an Address

To add an address to a customer's record:

1. Select the **Add Address**.

2. The Edit Address dialog will be displayed. Complete the required information before selection **OK** to continue.

> **Note:** If post code lookups are enabled for your system you can find the customer's address by entering their post code before selecting **Lookup**. Pick the appropriate address for those listed.

3. The Select Delivery Address dialog will be redisplayed allowing you to select the address to use for the order.

Skip Adding an Address

If you do not wish to add a delivery address, select **Skip** to continue without selecting an address.

PAYMENT METHODS

Cash

To take cash payment for a booking:

1. Select **Cash** on the Payment Method screen.

2. The Cash screen will be displayed:

3. Enter the amount tendered by the customer by either typing the amount directly into the **Amount Tendered** text box, or using the buttons available:

- **Repeat.** Select to repeat the previous made against the shopping cart. When this option is selected the value of the last payment made will be added to the amount tendered box.

- **Split.** Select to pay a proportion of the outstanding amount. The Split Payment Calculator dialog will be displayed allowing you to select the proportion the customer is paying (e.g. ½). When an option is selected Payment dialog will be redisplayed showing the amount calculated in the **Amount Tendered** box.

- **Total.** Select if the customer has tendered the total amount left to pay.

- **£20.** Select to add £20 to the amount tendered.

- **£10.** Select to add £10 to the amount tendered.

- **£5.** Select to add £5 to the amount tendered.

4. Complete the additional information requested:

- **Send Confirmation Email to Customer.** Select to send a confirmation email to the customer (an email address will be required).

- **Send Confirmation Email to Operator.** Select to send a confirmation email to the operator.

- **Print Receipt.** Select to automatically print a receipt.

5. Once the details are complete select **Pay** to continue.

6. If you need to return change to the customer, a dialog advising of the amount to be paid will be displayed. Select **OK** to continue.

Loyalty

Use the Loyalty option if the customer is using loyalty points to pay for their purchases.

1. When the Loyalty payment method is select the Loyalty screen will be displayed:

2. The customer's number of available loyalty points will be displayed. Enter the number of points to redeem in the box provided.

3. Complete the additional information:

   - **Send Confirmation Email to Customer.** Select to send a confirmation email to the customer (an email address will be required).

   - **Send Confirmation Email to Operator.** Select to send a confirmation email to the operator.

   - **Print Receipt.** Select to automatically print a receipt.

4. Once the details are complete, select **Pay** to continue.

Chip and Pin

If a chip and pin device is connected to the till, payment can be taken using this method. The payment receipt from the device should be put into the till once payment has been taken. To process a chip and pin payment:

1. Select **Chip and Pin** on the Payment Method screen.

2. The Chip and Pin screen will be displayed:

3. Enter the amount tendered by the customer by either typing the amount directly into the **Amount Tendered** text box, or using the buttons available:

- **Total.** Select if the customer has tendered the total amount left to pay.

- **£20.** Select to add £20 to the amount tendered.

- **£10.** Select to add £10 to the amount tendered.

- **£5.** Select to add £5 to the amount tendered.

4. Select **Process Card Payment** and use the associated Chip and Pin machine to process the payment.

5. Once the payment has been processed, enter the Authentication Code issued by the Chip and Pin machine in the **Authentication Code** field.

Card

The card option should be used to take a credit or debit card payment from a customer when they are not present to enter their chip and pin details. To take a card payment without the customer present:

1. Select **Card** on the Payment Method screen.

2. The Card Payment screen will be displayed:

3. Enter the following details:

- **Card Number.** Enter the long card number. Mandatory field.

- **Name on Card.** Enter the customer's name as it appears on the card. Mandatory field.

- **Start Date.** If available, enter the start date for the card.

- **Expiry Date.** Enter an end date for the card. Mandatory field.

- **Issue Number.** If available, enter the issue number for the card.

- **Security Code.** Enter the three digit security number taken from the signature strip on the back of the card. Mandatory field.

- **Send Confirmation Email to Customer.** Select to send a confirmation email to the customer (an email address will be required).

- **Send Confirmation Email to Operator.** Select to send a confirmation email to the operator.

- **Print Receipt.** Select to automatically print a receipt.

4. Once the details are complete, select **Pay** to continue.

Invoice

Use the invoice option if the customer is to be invoiced before paying at a later date.

1. When the **Invoice** option is selected, the Invoice screen will be displayed:

2. Enter the amount tendered by the customer by either typing the amount directly into the **Amount Tendered** text box, or using the buttons available:

- **Total.** Select if the customer has tendered the total amount left to pay.

- **£20.** Select to add £20 to the amount tendered.

- **£10.** Select to add £10 to the amount tendered.

- **£5.** Select to add £5 to the amount tendered.

3. Complete the additional information:

- **Send Confirmation Email to Customer.** Select to send a confirmation email to the customer (an email address will be required).

- **Send Confirmation Email to Operator.** Select to send a confirmation email to the operator.

- **Print Receipt.** Select to automatically print a receipt.

4. Once the details are complete, select **Pay** to continue.

Voucher

To take voucher payment for a booking:

1. Select **Voucher Managed** on the Payment Method screen.

2. The Voucher Managed screen will be displayed:

3. Enter the voucher code into the box provided

4. Complete the additional information requested:

   - **Send Confirmation Email to Customer.** Select to send a confirmation email to the customer (an email address will be required).

   - **Send Confirmation Email to Operator.** Select to send a confirmation email to the operator.

   - **Print Receipt.** Select to automatically print a receipt.

5. Once the details are complete select **Pay** to continue.

6. The system will attempt to validate the voucher code entered. If the voucher code is not valid a message will be displayed informing you the voucher is invalid.

USING TABS

If tabs have been set up for use on your terminal, you can add the value of the booking cart to the customer's tab. To use tabs carry out the following:

1. Select the **Tab** payment method.

2. If there are no existing tabs, a warning message will be displayed. Select **OK** to continue.

3. The Tab payment method dialog will be displayed:

4. If using an existing tab, select the details from the **Select Open Tab** panel. If creating a new tab select **New Tab**. The New Tab dialog will be displayed. You will be asked to enter a name and pin (if applicable) for the tab. Once the details are complete select **OK** to continue.

5. If using a new tab, select **New Tab** and complete the requested details.

SPEED CHECKOUT

On occasion, for example on match day you may not wish to collect customer details for each purchase made. In this instance the Speed Checkout option can be enabled by your system administrator. To use the Speed Checkout options:

1. Once the product has been added to the shopping cart, select the **Speed Checkout** option (highlighted below):
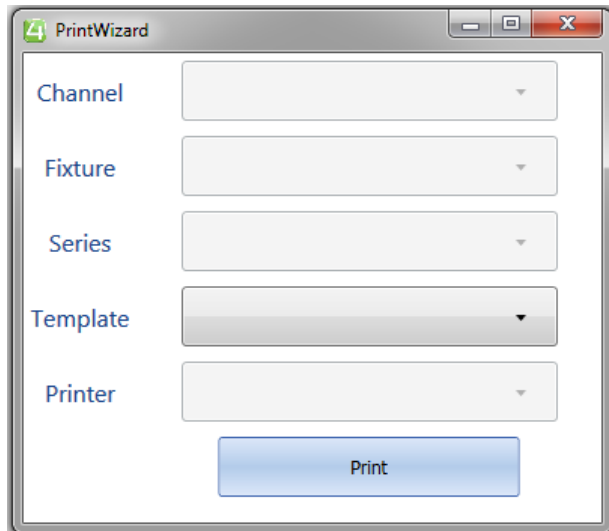
2. The Payment Method dialog will be displayed. Select the appropriate option and process the payment in the usual manner.

PRINTING TICKETS

Once payment has been made, it is necessary to print the tickets for the customer:

1. Select **Print Wizard**.

2. The Print Wizard will be displayed:

3. Complete the following details:

   - **Template.** Use the drop-down list to select the print template to be used, for example select an appropriate template for printing tickets or season passes.

   - **Printer.** Use the drop-down list to select the printer that is to be used. Only printers that can be used with the selected template will be displayed.

4. Once the tickets have printed the shopping cart will be re-displayed. Select **Close** to close the booking.

> **Note:** If you are making a booking for an away match, it will be necessary to print a receipt for the customer as the tickets will be supplied by the away club.

BATCH PRINTING

On occasion it may be necessary to print a batch of tickets, for instance when printing tickets to fulfil bookings made online. To print a batch of tickets:

1. Select the **Other** tab heading.

2. Select **Print**.

3. The Print Wizard will be displayed:
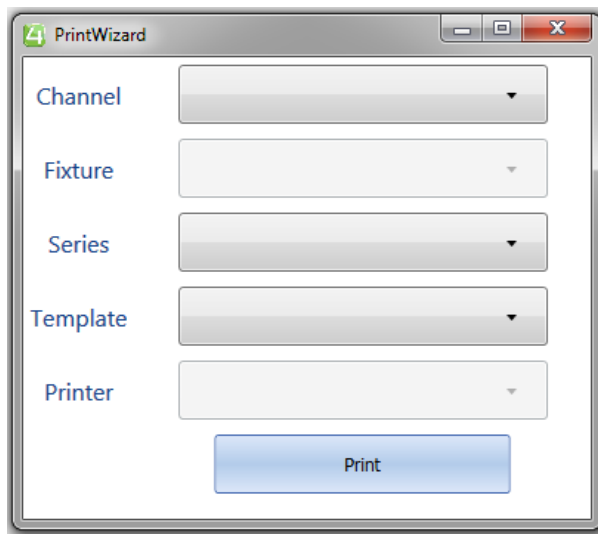
4. Use the drop-down to select the **Channel**, for example select **Web**.

5. Next select either the **Fixture** (to print all of the tickets sold for a fixture via the selected channel) or **Series** (to print season tickets sold via the selected channel). Only the fixture and series tickets available via the selected channel will be listed.

6. Select the template to be used, for example ticket with address.

7. Select the printer to be used. Only printers suitable for use with the selected template will be available.

8. Click **Print** to complete the print job.

SHOPPING CART – ADDITIONAL FUNCTIONALITY

DELETING ITEMS FROM THE SHOPPING CART

To delete an item from the shopping cart:

1. Select the **X** button alongside the item that you wish to remove.

2. The item will be removed from the shopping cart without further warning.

ADDING PROMOTIONS

Customers may present promotional codes that they have received through emails or advertisements. To add these to the shopping cart carry out the following:

1. Select **Promotion** at the bottom of the shopping cart.

2. The Booking Promotion Window will be displayed:
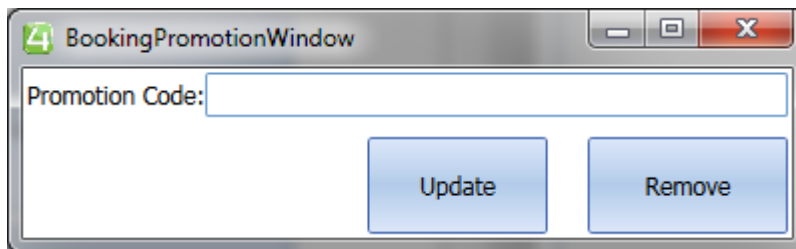
3. Enter the **Promotional Code** presented by the customer.

4. Select **Update** to add the promotion to the shopping cart. The cart will be updated immediately.

To remove a promotional code:

1. Select **Promotion** at the bottom of the shopping cart.

2. The Booking Promotion Window will be displayed. The promotional code previously added to the cart will be displayed.

3. Select **Remove** to continue. The shopping cart will be updated immediately.

> **Note:** Only one promotional code can be added to a shopping cart.

ADDING BENEFICIARIES

For some products the names of the beneficiaries may be required or requested. As beneficiaries are entered into the database, this is a good method of capturing more information about the customers using your centre. To add a beneficiary to a booking:

1. If beneficiaries are required or requested for a product included in the shopping cart, the Edit Beneficiaries dialog will be displayed when you select **Beneficiaries** in the Shopping Cart, or when you select **Add Payment** for a booking.

2. Enter the requested information before selecting **OK**. All fields marked in bold text are mandatory and must be completed before you can continue processing the booking.

3. If the customer associated with the booking has previously supplied beneficiary details, the Previous Users dialog will be displayed if these details match those entered into the Edit Beneficiaries dialog. For example, if the current customer has previously entered the beneficiary name Joe Smith, when you type J into the First Name field, the previous users dialog will be displayed listing Joe Smith (and any other beneficiaries linked to the customer and starting with J). Click over the appropriate name to use a beneficiary from the Previous Users dialog.

MANAGING BOOKINGS

Once a booking has been made the details can be accessed via the Find Booking Screen and a number of related tasks can be carried out:

- Finding a Booking

- Amending a Booking

- Viewing a Booking's Details

- Finding a Booking Using the Seat or Ticket Number

FINDING A BOOKING

To find a booking carry out the following:

1. Select the **Find Booking** tab heading.

2. The Find Booking Screen will be displayed:

3. Enter one or more of the following pieces of information:

- **Booking Ref.** Enter the booking reference of the booking you are interested in.

- **Customer Ref.** Enter the customer reference of the customer assigned to the booking.

- **First Name.** Enter the first name of the customer assigned to the booking.

- **Company.** Enter the company of the customer assigned to the booking.

- **Surname.** Enter the surname of the customer assigned to the booking.

4. Select **Search** to continue.

5. Any bookings matching the details entered will be listed in the Results area (see above). To edit the details of a booking select **Amend Booking** (see Amending a Booking for details), or to review the details of a booking select **Detail** (see Viewing a Booking's Details for details).

AMENDING A BOOKING

To amend a booking listed on the Find Booking:

1. Select **Amend Booking** alongside the appropriate booking.

2. The shopping cart will be displayed listing the details of the existing booking:

3. The details of the original (or parent) booking, including booking number will be shown at the top of the cart (highlighted above).

4. Amend the shopping cart as follows:

    - **Add Product.** To add a product to the shopping cart, select the product from the Current Booking screen on the left hand side of the window. See Selecting the Ticket Option for more details on adding products to the shopping cart.

    - **Delete Product.** To delete a product from the booking, select the **X** button alongside the appropriate item. The product will be removed from the booking immediately.

5. Before closing ensure payment is collected for the additional purchases and any extra tickets have been printed. For more details see Taking Payment and Printing Tickets.

Note: Once the amended booking is saved (after payment has been received) the booking will have a new reference number which will be in the format: ***<parentreferencenumber>-1***. You will no longer be able to make modifications to the parent booking, as this will be set to inactive and therefore all subsequent changes will have to be made to the amended booking.

VIEWING A BOOKING'S DETAILS

To view the details of a booking listed on the Find Booking screen:

1. Select **Detail** alongside the appropriate booking.

2. The Booking Details dialog will be displayed:

3. If related bookings exist, for example parent or child bookings, the **Next** and **Previous** buttons can be used to move to the related bookings.

4. If the booking consists of more than one product, selecting the product variant will highlight the beneficiary assigned to this ticket. The scroll bar on the right can be used to scroll down to the ticket information section relating to this product variant and will also be highlighted.

5. Other options available include:

- **Print Voucher.** If the booking includes vouchers, use this option to print the vouchers purchased.

- **Cancel Voucher.** If the booking includes vouchers, use this option to cancel the vouchers purchased.

- **View Comment.** Select to view the comments linked to the booking. The Booking Comment will be displayed. Additional comments can be added directly into the comments box. Select **Close** to return to the Booking Details dialog.

- **View Purchaser.** Select to view the purchaser's details. The Customer Details dialog will be displayed. For more information see Customer Details Dialog.

- **Print Wizard.** Select to open the Print Wizard allowing you to print tickets linked to the booking.

- **Upgrade/Move.** Select to upgrade or more a season ticket for a selected fixture. This option is only available if the booking is for a season ticket and the upgrade/move functionality has been enabled for your system. See Season Tickets for more details.

- **Fixture Ticket.** Select to print a fixture ticket that has been purchased as part of a series. For example, if the customer has forgotten their season ticket, you can print a match day ticket for the current fixture to enable them to enter the stadium. For more details see Season Tickets.

FINDING A BOOKING USING THE SEAT OR TICKET NUMBER

To find a booking carry out the following:

1. Select the **Find Seat** tab heading.

2. The Find Seat Screen will be displayed:

3. Enter one or more of the following pieces of information:

- **Series.** Use the drop-down list to select the series you are interested in. Only use this option if you are searching for a series booking.

- **Fixture.** Use the drop-down list to select the fixture you are interested in. Only use this option if you are searching for a fixture booking.

- **Block.** Use the drop-down list to select the block the booking relates to.

- **Row.** Enter the row number the booking relates to.

- **Seat.** Enter the seat number the booking relates to.

- **Barcode.** Enter the ticket barcode.

- **Customer.** This field will be activated once a Series or Fixture is selected and the customer reference no. can be used to search for the booking.

4. Select **Search** to continue.

5. Any bookings matching the details entered will be listed in the Results area. To edit the details of a booking select **Amend Booking** (see Amending a Booking for details), or to review the details of a booking select **Detail** (see Viewing a Booking's Details for details).

SEARCHING FOR A CUSTOMER

To search for a customer:

1. Select the **Customer** tab heading.

2. The Find Customer Screen will be displayed:

3. Enter one or more of the following pieces of information:

- **Email.** Enter the customer's email address. The address entered must exactly match the entry held in the system.

- **Customer Ref.** Enter the customer's unique customer reference number.

- **First Name.** Enter the customer's first name. It is not necessary to enter the customer's full name, for example entering Ste will find Steve, Steven, Stephen, etc.

- **Company.** Enter the customer's company (if a corporate customer). It is not necessary to enter the full company name.

- **Surname.** Enter the customer's surname. It is not necessary to enter the customer's full name, for example entering Rob will find Robinson, Roberts, etc.

- **Post Code.** Enter the customer's postcode. It is not necessary to enter the customer's full post code.

4. If you wish to include customers that have been added as beneficiaries select the **Product User Bookings** check box.

5. Once you have entered one or more search terms, select **Search Customer**.

6. Any records found to match the search term entered will be listed below the search terms:

7. Any bookings matching the details entered will be listed in the Results area. To add a customer to the current booking, select **Add to Order** alongside their details. To view details of the customer's previous bookings select **Show Bookings**.

CREATING A NEW CUSTOMER

To create a new customer using the Customer screen:

1. Carry out a customer search (as described above) to ensure the customer's details have not been previously added to the system.

2. To add new customer details, select **Add Customer**.

3. The Customer Details screen will be displayed:

4. Enter the requested details. The Customer Reference field is read only and will be auto populated on submission of the form.

> **Note:** If you have postcode lookup enabled for Green 4 Ticketing you can enter the individual's address by entering the customer's postcode before selecting **Lookup**. Pick the appropriate address from the list of addresses returned.

5. Select **OK** to confirm the details.

6. The Customer screen will be re-opened displaying the newly added customer.

PUTTING A CUSTOMER ON HOLD

To put a customer on hold:

1. Carry out a customer search (as described above).

2. Select the **On Hold Status** tab.

3. The On hold status screen will be displayed:

4. Select **Add on-hold.**

5. Select a **Reason** from the drop down list. Reason codes are set up in CRM.

6. Add any additional information in the **Additional on hold** info field.

7. An Off hold date can be selected in the future, else this field can be left blank and an off hold date entered at a later stage.

8. Select **Save.**

9. An On Hold audit record will be created against the contact listing the reason why the contact has been put on hold and the consequence of the contact being on hold.

10. If a contact has been put on hold, this status will be shown on the Customer Detail screen

11. Depending on the on hold reason set up, the customer may be restricted from purchasing a ticket. The set up of the reason code can consist of one or a combination of the following settings:

- Do not allow purchase

- Do not allow ticket allocation

- Do not allow access.

12. The following alert will be shown when a booking is made if the set up consists of the option 'Do not allow purchase'.
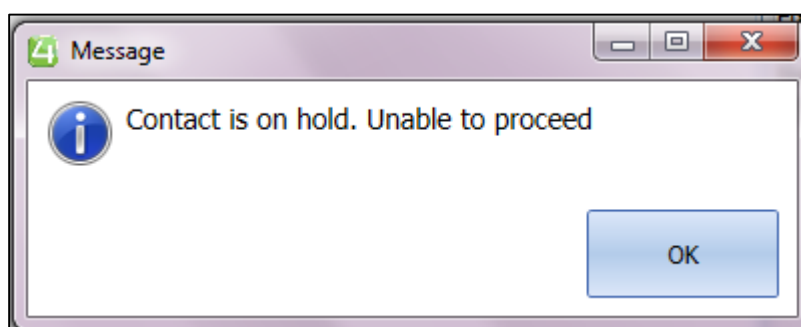
13. The customer can be taken off hold if required. This is done by opening the Customer Details form.

14. Select the On Hold record.

15. Select **Edit**

16. Select **Remove** or capture today's date in the **Off hold date** field.

17. If the **Off hold date** field is set to today's date, the 'On Hold' status will be removed from the contact record.

18. An audit trail is maintained for the customer's on hold statuses and includes the name of the user who put the customer on hold and took the customer off hold.

CUSTOMER DETAILS DIALOG

The Customer Details dialog can be opened by selecting **View Purchaser** on the Booking Details dialog. From the Customer Details dialog the following options are available:

INFORMATION TAB

Select the **Information** tab to view the customer's details.

BOOKING HISTORY

Select the **Booking History** tab to view a list of previous bookings made by the customer. From the list bookings you can select to amend the booking (**Amend Booking**) or view the booking details (**Details**).

RESERVED SEATS

Select the **Reserved Seats** tab to manage any reservations that have been created for the customer. See [Reservations](#) for more details.

ADDRESSES

Select the **Addresses** tab to manage the customer's addresses. Using the tab you can select to:

- **Set As Default.** Set the address to be the customer's default address.

- **Edit.** Select to edit the address.

- **Delete.** Select to delete the address.

- **Add Address.** Select to add a new address for the customer.

ON HOLD STATUS

Select the **On Hold Status** tab to view and manage the customer's On Hold Audit records and On Hold Status

RESERVATIONS

The Reservations functionality in Green 4 Ticketing is used to reserve a ticket for a future event (e.g. cup match, friendly or new season ticket) for a customer that already holds a ticket (normally a season ticket). If a reservation has been made for a customer, carry out the following to convert the reservation into an actual booking:

1. Using the **Customer** tab heading, search for the customer (see Searching for a Customer for details).

2. In the results list that is displayed, double-click over the relevant customer.

3. The Customer Details dialog will be displayed. Select the **Reserved Seats** tab:

4. Select the reservations that the customer wishes to purchase.

5. Select Buy Tickets to continue. Note, if the customer wishes to purchase more than one reserved ticket, you can select Buy Group, which will handle the tickets as a group, for example two adults and two children tickets could be converted into a family ticket.

6. The Select Product Variant dialog will be displayed. This allows you to change the product variant for the selected seat. For example it would allow you to change a child seat into an adult seat (or vice versa). To change the variant, select **Change Variant**. A list of available variants will be displayed. Click **Select** alongside the appropriate option. Once the appropriate variant is selected, click **OK** to continue.

7. The shopping cart will be displayed showing details of the reserved products that you have added to the booking. Process the order in the normal manner.

SEASON TICKETS

When a customer has purchased a season ticket, a number of additional functions can be made available which allows them to:

- Upgrade their season ticket for an individual fixture, for example if they wish to upgrade to a higher priced area of the stadium

- Move their season ticket for an individual fixture, for example if they wish to move to a different seat in the stadium, which costs the same price.

- Print a ticket for an individual fixture, for example if the customer has forgotten their ticket for a game, you can print a fixture ticket to allow them to enter the stadium for the game.

UPGRADE

To upgrade a season ticket for a fixture:

1. Open the series ticket booking details in the Booking Details dialog (see Finding a Booking for information on how to search for a booking).

2. Select **Upgrade/Move**.

3. The Current Booking screen will be displayed.

4. Complete the following details:

- **Fixture.** Use the drop-down list to select the fixture the series ticket holder wishes to upgrade for.

- **Tickets.** The currently held series tickets will be displayed. Select which tickets the holder wishes to upgrade.

5. Once the details are complete, select **Upgrade**.

6. The standard ticket selection page will be displayed. Complete the process of selecting the customer's seat type and position in the stadium.

7. The details will be added to the Shopping Cart in the usual manner.

8. The value of the series product previously purchased will be credited to the Shopping Cart.

9. Complete the booking in the standard way.

MOVE

To move a season ticket for a fixture:

1. Open the series ticket booking details in the Booking Details dialog (see Finding a Booking for information on how to search for a booking).

2. Select **Upgrade/Move**.

3. The Current Booking screen will be displayed.

4. Complete the following details:

   - **Fixture.** Use the drop-down list to select the fixture the series ticket holder wishes to move for.

   - **Tickets.** The currently held series tickets will be displayed. Select which tickets the holder wishes to move.

5. Once the details are complete, select **Upgrade**.

6. The standard ticket selection page will be displayed. Complete the process of selecting the customer's seat type and position in the stadium.

7. The details will be added to the Shopping Cart in the usual manner.

8. The value of the series product previously purchased will be credited to the Shopping Cart.

9. Complete the booking in the standard way.

PRINT FIXTURE TICKET

To print a fixture ticket that is linked to a series carry out the following:

1. Open the series ticket booking details in the Booking Details dialog (see Finding a Booking for information on how to search for a booking).

2. Select **Fixture Ticket**.

3. The Current Booking screen will be displayed.

4. Complete the following details:

   a. **Fixture.** Use the drop-down list to select the fixture the series ticket holder wishes to have printed.

   b. **Tickets.** The currently held series tickets will be displayed. Select which tickets the holder wishes printed.

5. Once the details are complete, select **Fixture Ticket**.

6. The Print Wizard dialog will be displayed allowing you to select the printer and transform.

PARTIAL SERIES SALES

1. When partial ticket sales have been setup for your installation of Green 4 Ticketing, when you create a booking for a series ticket in POS, when the seat picker is displayed, any seats that are available for some of the series only will be shown in blue:

2. When you select a seat that is blue, a dialog will be displayed stating which fixtures the seat is already taken for. Ensure you make a note of the fixtures not covered by the series ticket.

3. Select OK to continue.

4. Once the appropriate number of seats has been selected the **Add to Cart** button will become enabled. Select to continue.

5. In addition to the series ticket, a coupon product will be added to the cart. This can be used to purchase individual tickets for the fixtures not included in the series.

COUPONS

Coupons may be issued either by your organisation or by a third-party, e.g. Groupon. Coupons can be exchanged for pre-defined products only and have no monetary value. To exchange a coupon:

1. Select the **Coupon** tab heading.

2. The Coupon page will be displayed:

3. Complete the following details using the information provided with the coupon:

    *   **Coupon Category.** Select the coupon category from the drop-down list.

    *   **Coupon Type.** Select the coupon type from the drop-down list.

    *   **Coupon Code.** Enter the first coupon code.

    *   **Coupon Code 2.** Enter the second coupon code (if applicable).

4. Once the details are complete, select **Add Coupon**.

5. Repeat the above process for all the coupons held by the customer.

6. The Coupon page will update to display details of the coupons entered:

7. Select **Remove** to remove any coupons that have been added in error. The Remove Coupons dialog will be displayed allowing you to select which coupons to remove.

8. Click **Select** alongside the product the customer wishes to purchase using the coupons.

9. The Additional Guests area will be displayed. Enter the number of paying guests to include on the booking (there is no need to add the guests paying using a coupon).

10. Once the guest number is correct, select **Continue**.

11. You will be guided through the standard product purchasing process.

MISCELLANEOUS TASKS

In addition to creating and managing ticket bookings, there are a number of additional tasks that can be performed within the Green 4 Ticketing application:
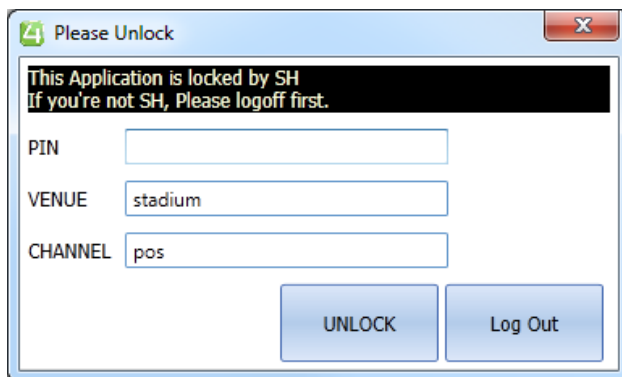
- Lock the terminal

- Log out of the terminal

- Produce a till report

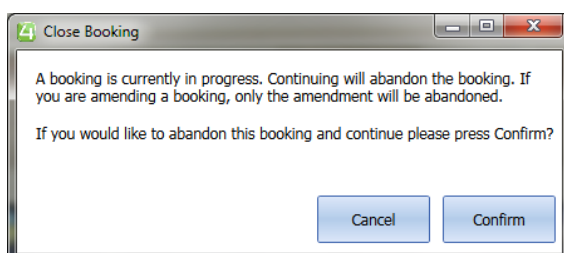- Open the till

- Record a Cash Skim

LOCKING THE TERMINAL

When you leave the terminal unattended, you should lock the terminal to prevent other people accessing the information available via the system. When the terminal is locked, any bookings that have not been completed will remain open ready for you to complete once you return.

To lock the terminal:

1. Select **Lock** on the Menu.

2. The Log In screen, stating that the terminal has been locked, will be displayed:

3. To restart using the terminal, enter your **PIN** and select **UNLOCK**. If a different user attempts to log into the terminal, they will be informed that the terminal is in use by a different operator. If they wish to continue using the terminal they will have to exit the Green 4 Ticketing application, before restarting and logging in (see Logging In for details).

4. To close Green 4 Ticketing, select **Log Out**. If a booking is in progress the Close Booking message will be displayed:
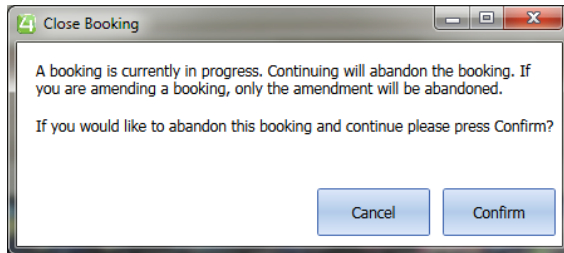
5. Select **Confirm** to close the application and lose the current booking details. Select **Cancel** to abort the exit attempt.

LOGGING OUT

To log out of the terminal:

1. Select **Log Out** on the Menu.

2. If a booking is in progress the Close Booking message will be displayed:

3. Select **Confirm** to continue logging out and lose the booking details. Select **Cancel** to abort the log out attempt.

PRODUCING A TILL REPORT

To print out a report of till activity for the current shift:

1. Select **Till Report** on the Menu.

2. The report will be printed on the attached printer.

OPENING THE TILL

To open the till (when not taking payment):

1. Select **Open Till** on the Menu.

2. You may be asked to enter your PIN as authentication. Enter your details before selecting **OK**.

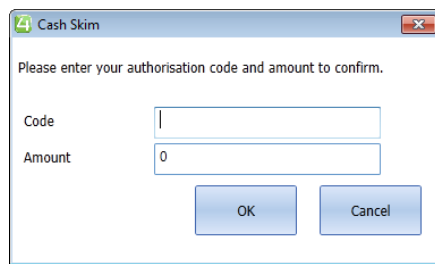3. The till connected to the terminal will open immediately.

Note: The open till option will only be available if a till is integrated with the terminal.

RECORD A CASH SKIM

In order to reduce the security risk of holding large amounts of money in the EPOS till, the latest version of Green 4 Ticketing has a "cash skim" option, which allows a user to record the removal of money from the till. The recording of a cash removal using the Cash Skim option will result in an audit record being generated in the CRM database.

To record the removal of cash from the till:

1. Select **Cash Skim** on the Menu.

2. The Cash Skim dialog will be displayed:

3. Enter the following details:

- **Code.** Enter you pin.

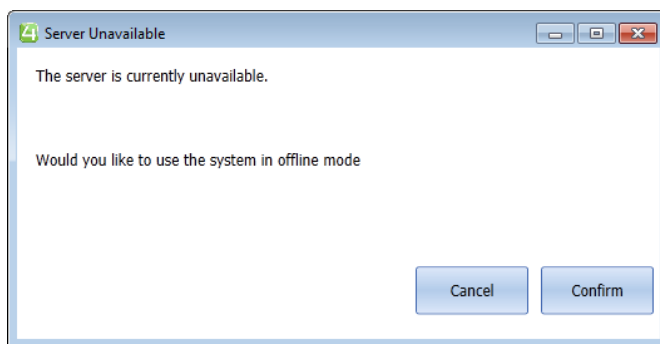- **Amount.** Enter the amount of money you are removing from the till.

4. Select **OK** to continue.

OFFLINE WORKING

Offline working allows you to continue to take bookings when your internet connection temporarily fails. The functionality available when offline is limited to designated products and payment methods. In addition promotions cannot be applied to bookings made whilst offline.

SWITCHING TO OFFLINE MODE

1. When your Internet connection fails, an error message stating that the server is unavailable will be displayed.

2. Select **OK** to continue.

3. Exit EPOS, confirming the loss of any open bookings if necessary.

4. Restart EPOS.

5. The Server Unavailable dialog will be displayed. Select **Confirm** to continue using EPOS in the offline mode. If you select **Cancel**, EPOS will fail to open.

6. The Please Login dialog will be displayed. Enter you **pin** and select **Login**.

7. The Booking screen will be displayed allowing you to continue taking bookings for products that have been set to be available offline.

8. When you take a booking in the offline mode, you will be unable to add a customer to the booking and will only be able to use selected payment methods, for example Cash.

SWITCHING TO ONLINE MODE

When your internet connection is restored EPOS will continue to function in offline mode until you exit the application. To switch back to the online mode:

1. In EPOS select **Logout**.

2. The Please Login Screen will be displayed. Select **Exit**.

3. Restart EPOS.

4. The Server Available dialog will be displayed. Select Confirm to start using EPOS in the online mode. If you select Cancel, EPOS will continue to operate in the offline mode.

5. There may be a short delay before the Please Login dialog is displayed. The delay is the result of the offline bookings being transferred to the online database. Once the transfer is complete an information message stating the success of the transfer will be displayed. Select **OK** to continue.

6. The Please Login dialog will be displayed. Enter your pin and select **Login** to continue.