green4 SOLUTIONS

CRM DRIVEN SOLUTIONS FOR SPORT & LEISURE

GREEN 4 MERCHANDISE

SETTING UP AND SELLING RETAIL PRODUCTS

CONTENTS

ABOUT THIS DOCUMENT

This document has been prepared as a User Guide for setting up and selling retail products.

NON-DISCLOSURE

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DOCUMENT CONTROL

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V1.0	17/09/2014	This is a new document	CP
V2.0	23/10/2014	Updated	JW/CP
V2.1	04/11/2014	Updated to include Sales Plan set up (Version 3.6)	JW
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SETTING UP GREEN 4 RETAIL

1. INTRODUCTION

The Green 4 Retail solution provides the ability for a system administrator to set up retail and merchandise products that can be sold via the POS or the Web. An overview of the set up required is shown below.

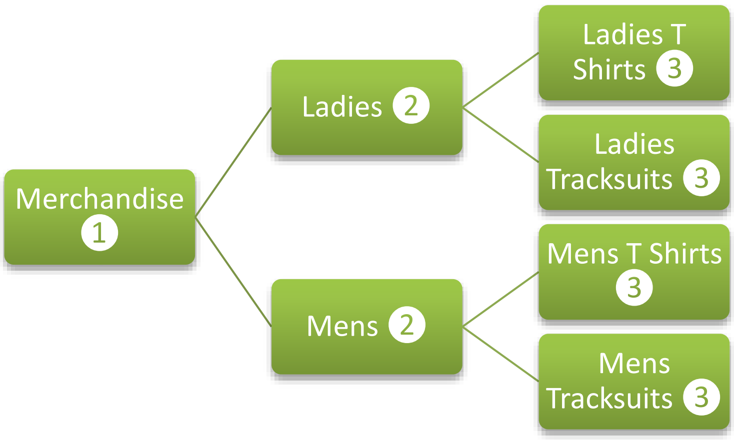
Planning	Infrastructure	Set Up	Putting Retail Products on Sale		
Product Categories Products Product Modifiers Product Pricing & VAT Product Images Product Descriptions Stock Levels Picking & Dispatching	Set up: Company Details Channels Payment Methods Terminals Operators Printers	Creating Sales Plans Price Lists and adding to Channels Creating new Variant Types	Creating a new retail product – set up a bookable product, VAT codes and product modifiers	Managing Stock	Picking and Dispatching
Business Process not covered in this guide	Covered in Green 4s Infrastructure Guide	Covered in Green Ticketing Booking Product Management Guide	**Green 4 Retail** **Set up instructions included in this guide**		

Note: Setting up of the infrastructure required for selling products is not covered in this guide. This involves the setup of sales Channels, Payment Methods, Terminals, Operators and Printers

2. SETTING UP RETAIL CATEGORIES

2.1. ANALYSIS CATEGORIES

In order to organise different retail products for sale in a logical manner, it is necessary to set up categories. These are called **Analysis Categories** in Green 4 Ticketing. Numerous levels of Analysis Categories can be set up to link the web or POS to a certain product, for example categories can be set up as per the diagram below. Bookable products can be added to each category level if required.



When creating an Analysis Category, numerous categories can be linked to other categories to create a chain, as is displayed above. This can be done by adding a **Parent Category** in the Analysis Category form which provides the link. For example in the above demonstration, both the Ladies and Men's Analysis Category will have a Parent Category of Merchandise completed. The Ladies T-Shirt and Tracksuit will have a Parent Category of Ladies added and the Men's T Shirt and Tracksuit will have a Parent Category of Men's. Although as many Parent Categories can be added to an Analysis Category as you like to create a long chain, it is advised that they are kept as short and simple as possible to avoid complication.

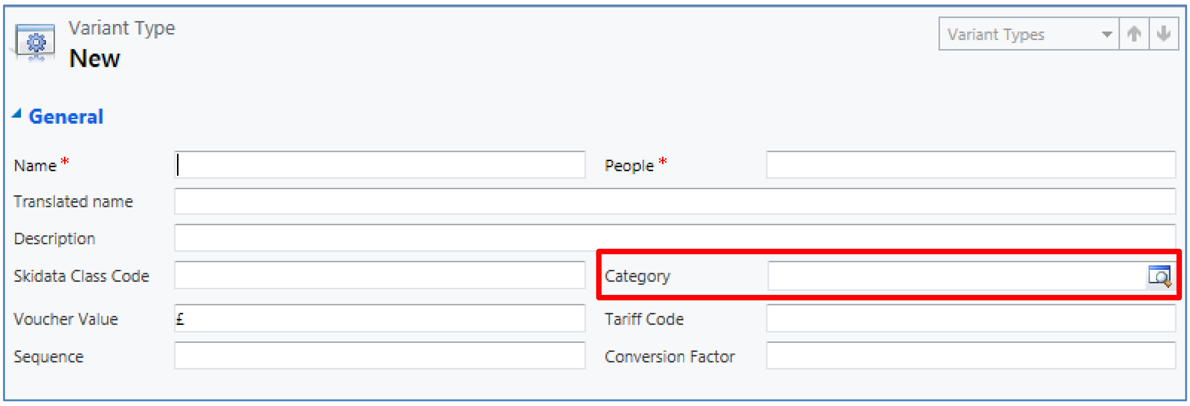
Analysis Categories are created my selecting **Product Management** in CRM before choosing **Analysis Categories** in the Navigation Area. From here select **New** in the ribbon.

To facilitate navigation on the Web, images should be added to each Analysis Category as well as the Bookable Products that are associated with each Category. It is recommended to name the categories the same to enable tracking of the Category levels in CRM. For the example above, Analysis Categories should be set up in CRM as follows:

Merchandise	
Merchandise - Ladies	Merchandise
Merchandise - Ladies - T Shirts	Merchandise - Ladies
Merchandise - Men	Merchandise
Merchandise - Men - T Shirts	Merchandise - Men

2.2. VARIANT TYPE CATEGORIES

With many different types of products, it may be necessary to use Variant Type Categories to manage the different Variants of the different products. The same variant types may be used across different products and categories can be used to distinguish between the different variants. This Variant Category can be found on the form used to create a new Variant Type.



2.3. IMAGES FOR CATEGORIES

Images can be uploaded against Categories to facilitate the drill down through the Categories when purchasing via the Web. Images for Categories are uploaded in the same way as for Retail Products, see section Adding an Image for the Retail Product for how to do this.

It is suggested that when images are uploaded for categories they are provided with a meaningful name that describes the Category and if applicable, the fact that it may be a drill down item to another level category. For example, the image uploaded for the Category Ladies in the example above would be Ladies_Category_Drill_Down.jpg.

3. CREATING A NEW RETAIL PRODUCT

The sale of retail products 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 a book the variant type would be "each", whereas for a T-Shirt it may be "Large," "Small" and "Medium". Variant types should be reused where possible.
- **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. It is recommended that you have a separate variant price list for use with stock products. It is recommended that you have a separate variant price list for use with stock products.
- **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.

3.1. 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, for example POS-Retail.
- **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.

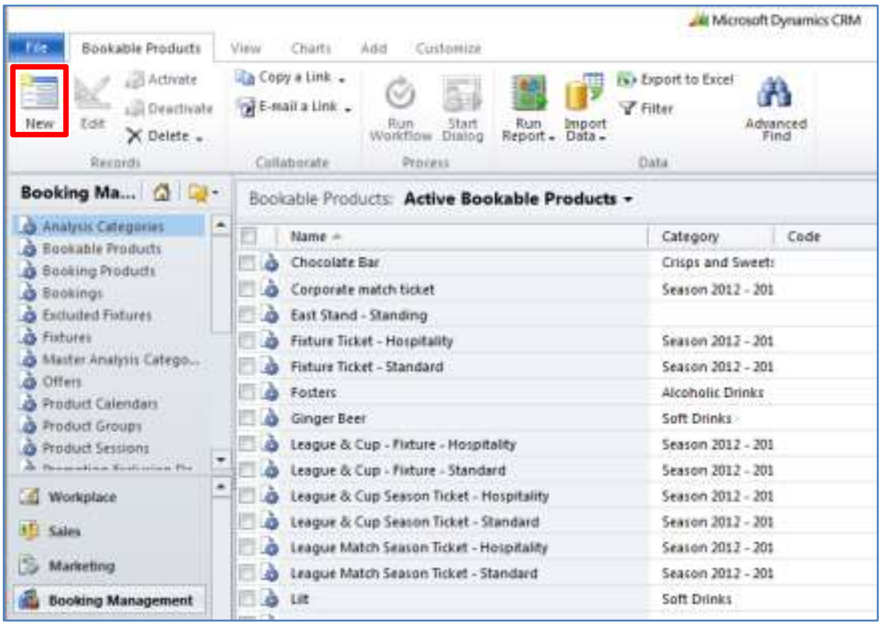
A channel price list will need to be created for each Variant Price List – Channel combination created.

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

3.2. SETTING UP A BOOKABLE PRODUCT

a) In the CRM **Navigation Panel** select **Product Management** followed by **Bookable Products**.

b) The Bookable Products list view will be displayed:



c) Select New on the ribbon (highlighted above).

d) A blank Bookable Product form will be displayed:

e) The fields to complete on this form are:

- **Name.** Capture the name of the product. This name will be displayed on the POS or Web.
- **Translated Name.** If the website is being setup as multi-lingual the translated names will be entered here in the following format. These translated names will appear on the website when the different language selection is made on the website.

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

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

- **Description.** Enter a description of the product.
- **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.
- **Payable By.** If the product can be paid for using direct debit select the direct debit payment method.

- **Report Category**. Used for reporting purposes to categorise the products sold through Green 4 Ticketing.
- **Code**. The product code can be captured in this field.
- **VAT Code**. Enter the percentage VAT that needs to be applied to this product. See Bookable Product VAT Codes and VAT Rates for more information .
- **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.
- **Beneficiary Requirement.** Use the drop-down list to select if a customer's name is required. In this case select Not Required. The customer will not be asked for their name and contact details.
- **Cost Price.** Enter the cost price of the item.
- **Requires Delivery.** Select if the customer has to enter a delivery address when purchasing the product.
- **Currency.** Using the Look Up, select the currency applicable for the product.

f) Select Save on the ribbon.

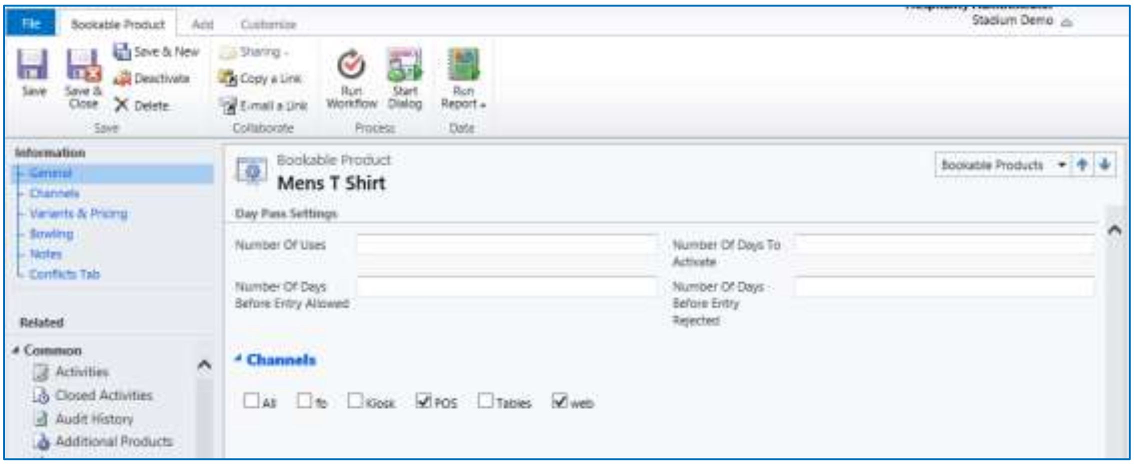
Note: Fields not listed above do not need to be completed or changed.

g) Next, it is necessary to indicate which channels the product can be bought via. To set the Channels carry out the following:

I. Select **Channels** in the Form Navigation area.

II. 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.

III. Select **Save** on the ribbon.



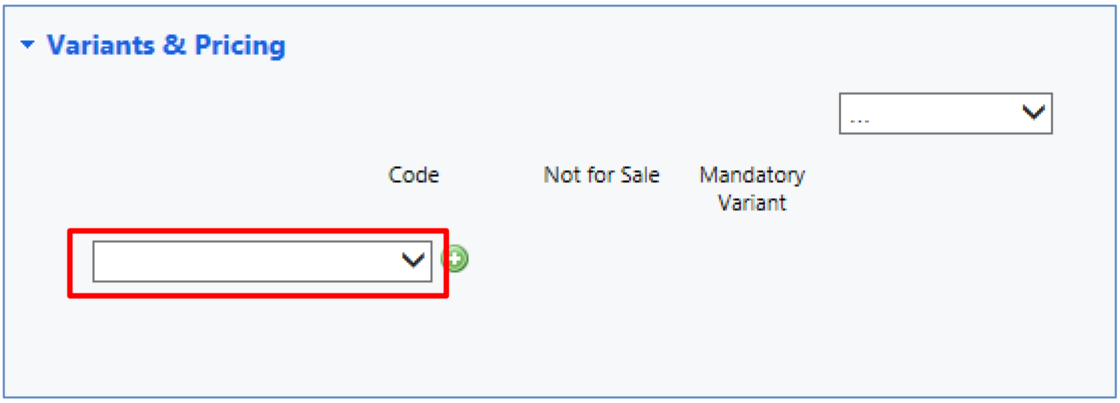
h) Identify the *Product Variants* and *Prices*:

Note: Information on how to set up new Variants and Variant Price Lists are not covered in this document but can be found in the Green 4 Ticketing Product Management Manual.

i. Select **Variants & Pricing** in the Form Navigation area.

ii. 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.

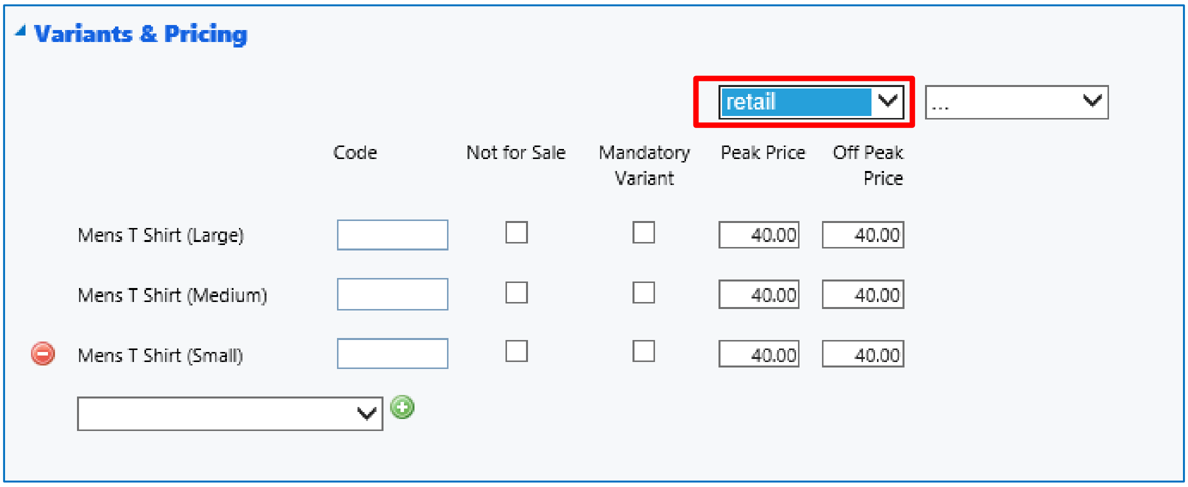
iii. Select the green cross alongside the variant name to add.



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

v. Enter the nominal code for each product – variant combination into the **Code** box.

vi. To enter price information for the product, select the relevant price list from the drop down at the top of the Variants & Pricing section (highlighted below):



vii. Enter the pricing (peak and off peak) information for each of the variants that are to be included on the price list.

viii. Repeat this process for each price list used to govern the pricing of the selected product.

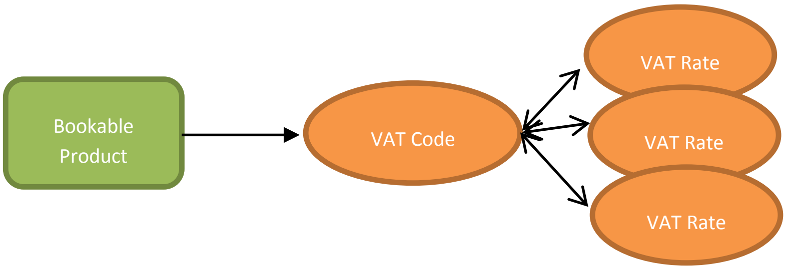
i) Once the pricing details are complete select **Save & Close** on the ribbon to save the product.

3.3. BOOKABLE PRODUCT VAT CODES AND VAT RATES

For each Bookable Product set up in the system, a VAT code and associated VAT rate can be associated to the product.

This section describes how to set up **VAT codes** and **VAT rates**.

The relationship between a bookable product and the VAT code and rates is shown below.



- A bookable product can be associated with one **VAT code.**
- A **VAT code** can be associated with one or more **VAT rates.**
- A **VAT rate** can only be associated with one **VAT code.**

Typically an EPOS system will have at least two VAT Codes set up, e.g. a Standard Rate and Zero Rate. There could be more depending on how VAT is charged within local environments. The ability to add different VAT Rates provides the ability to track changes to VAT rates over a period of time which may occur if there are changes in Government policy. The latest tax rate associated with a tax code will be the 'current' rate of tax to use.

To set up a VAT Code and associated VAT Rate in CRM:

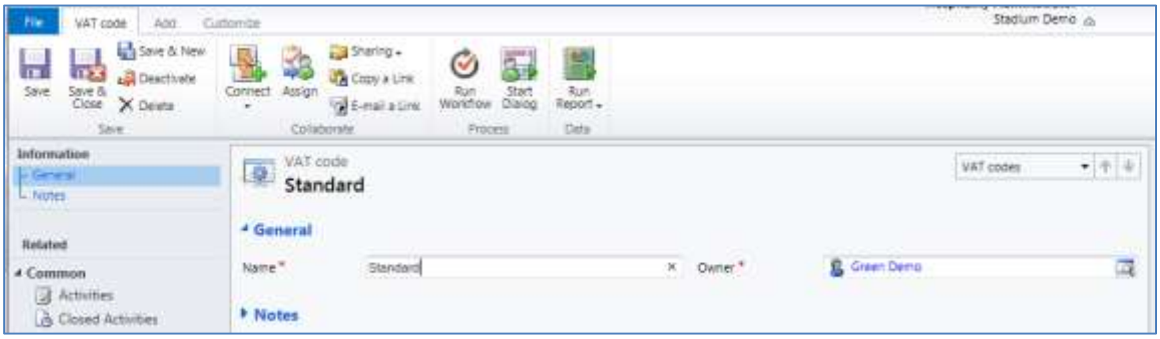
a) In the CRM **Navigation Panel** select **Product Management** followed by **VAT Code**.

b) The VAT codes list view will be displayed:

c) Select **New** to add a new VAT Code.

d) Capture the **VAT Code Name**, the owner will default to the logged in user.

e) Select **Save & Close**.

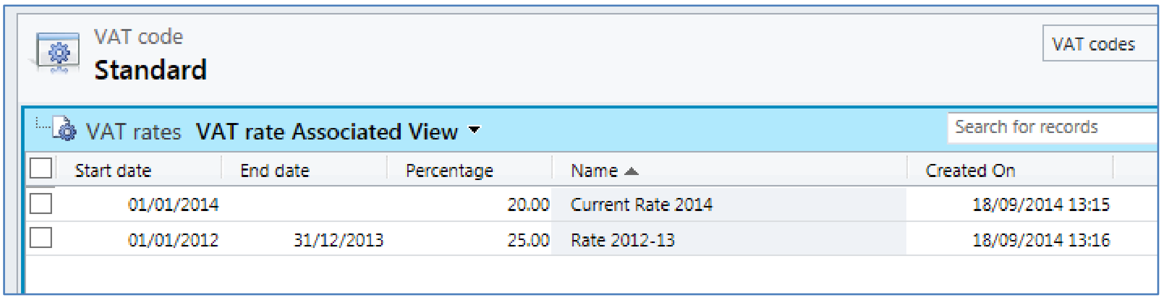


f) In the CRM **Navigation Panel** select **Product Management** followed by **VAT Rate**.

g) Select **New** to add a new VAT Rate and capture the following information:

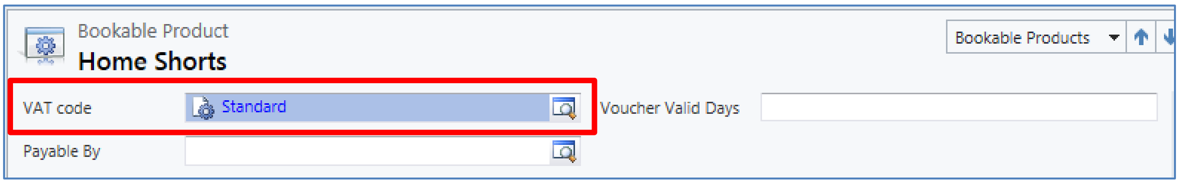
- **Name.** Enter a name for the VAT rate.
- **Percentage.** Enter the percentage of VAT that will be applied.
- **Start date and End date.** Capture the start and end date for when this VAT rate will be applied. If the VAT Rate is current, the End date should be left blank.

The VAT Rates entered need to be associated with the VAT Code and the associated view below shows how the changes in Tax Rates can be tracked.

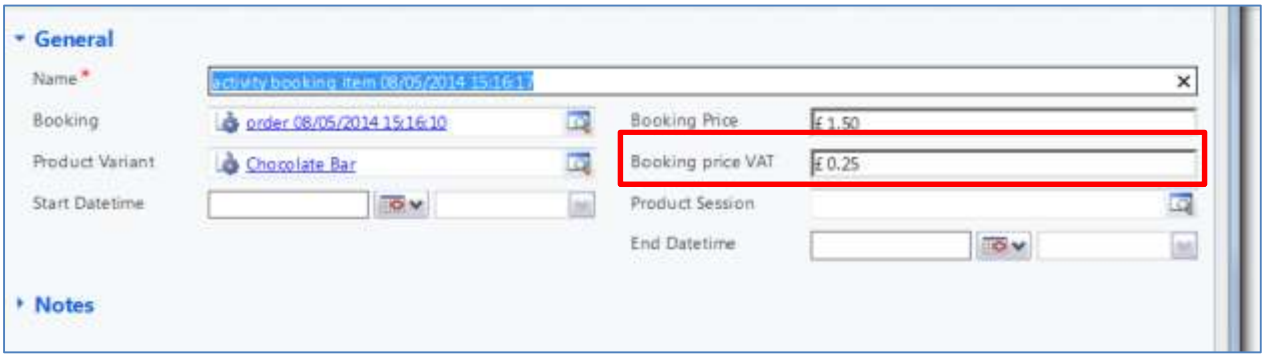


Start date	End date	Percentage	Name	Created On
01/01/2014		20.00	Current Rate 2014	18/09/2014 13:15
01/01/2012	31/12/2013	25.00	Rate 2012-13	18/09/2014 13:16

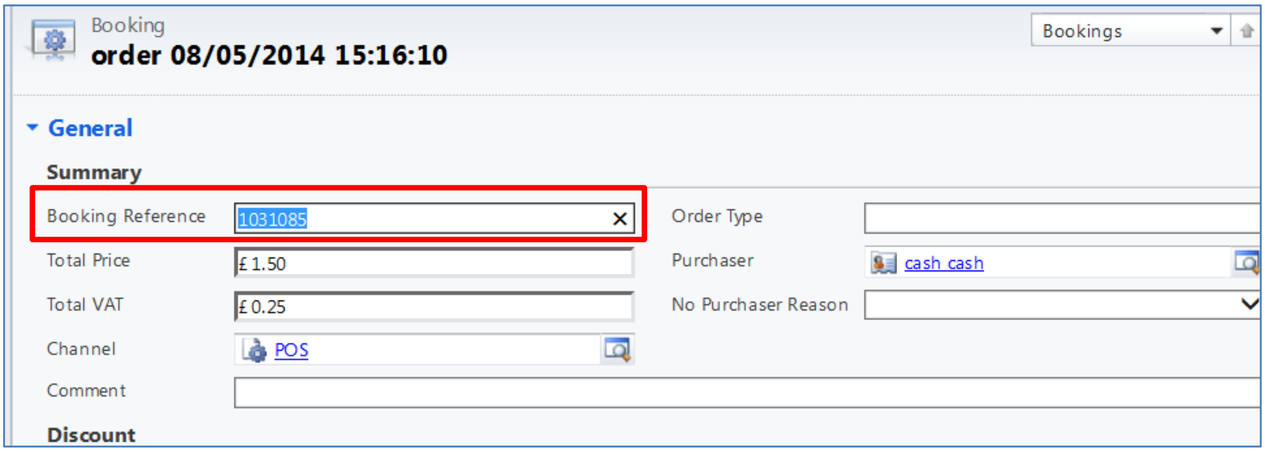
The applicable VAT Code should be captured against the Bookable Product as described in the section Setting up a Bookable Product, and the current VAT Rate, based on the start and end dates, associated with that VAT Code will be applied to the Bookable Product.



Whenever a bookable product is sold, during post-payment processing, a VAT figure is calculated (based upon the current Rate of tax), for each 'booking product' line. The figure is stored in the **Booking Product**, **Booking price VAT** field as shown below.



A total VAT amount is also recorded for each product sold and is written to the **Total VAT** field of the booking entity.



3.4. BOOKABLE PRODUCT MODIFIERS

Product modifiers can be set up in CRM to enable the selling of additional features which are related to a bookable product. For example, if a club shirt is put on sale modifiers can be setup that will prompt the EPOS Operator or Web end customer to have a name, number or badge included with the shirt sale. These extra features are classed as Product Modifiers within CRM. A bookable product can have zero, one or many Product Modifiers.

Modifiers come in a number of 'types', and depending how each modifier is set up, this will have an effect on how the modifier is presented to the POS Operator or end customer.

To set up a product modifier in CRM you must create a new **Bookable Product** to represent the additional feature of the product for example a shirt name or shirt number. To do this complete the following:

a) In the Navigation bar select **Product Management** followed by **Bookable Products** and Select **New** in the ribbon.

b) A new Bookable Product form will be displayed. Complete the following fields of the form:

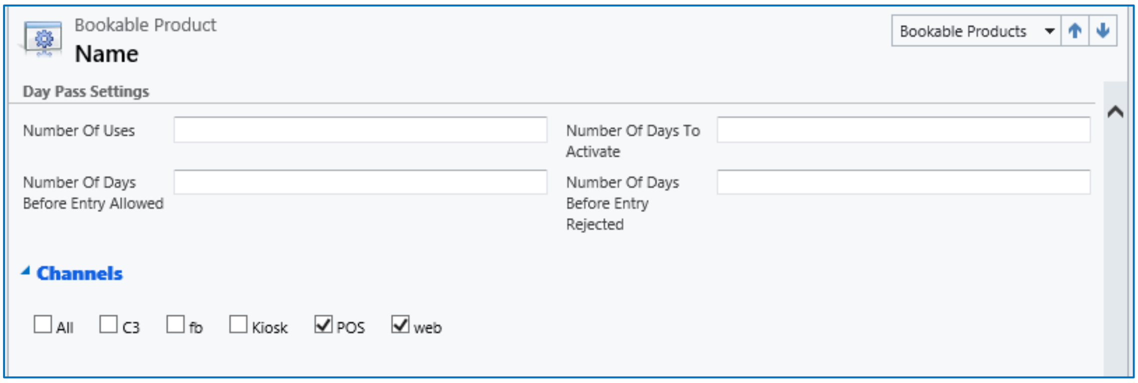
- **Name.** Enter the name of the additional feature to the product, for example away shirt number or shirt number.

- **Description**. Enter a description of the product.
- **Type.** Select Stock from the drop down list.
- **Category.** Use the Look Up dialog to select the product category. The category is used to group products, for example into tickets, food, merchandise etc. The categories are used by the price list and channel editors.

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.
- Select **Save** on the ribbon.



e) Identify the *Product Variants* and *Prices*:

Note: Information on how to set up new Variants and Variant Price Lists are not covered in this document but can be found in the Green 4 Ticketing Booking and Product Manual.

- Select **Variants & Pricing** in the Form Navigation area.
- To select a variant, in the drop-down list on the left hand side (highlighted below), select the appropriate option. All of the variants available in your system will be listed. If you have categorised the variants they will displayed in the relevant categories.
- Select the green cross alongside the variant name to add.

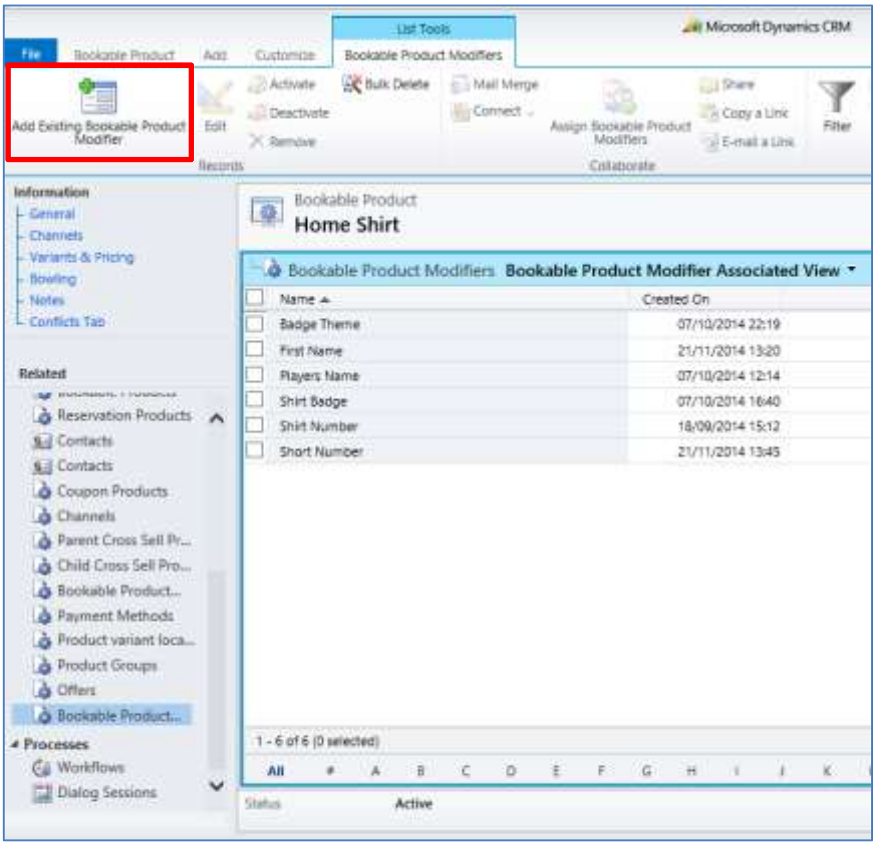
- Repeat until all variants are listed. If you need to remove a variant, click the red minus sign alongside the variant.
- Enter the nominal code for each product – variant combination into the **Code** box.
- To enter price information for the product, select the relevant price list from the drop down at the top of the Variants & Pricing section (highlighted below):

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

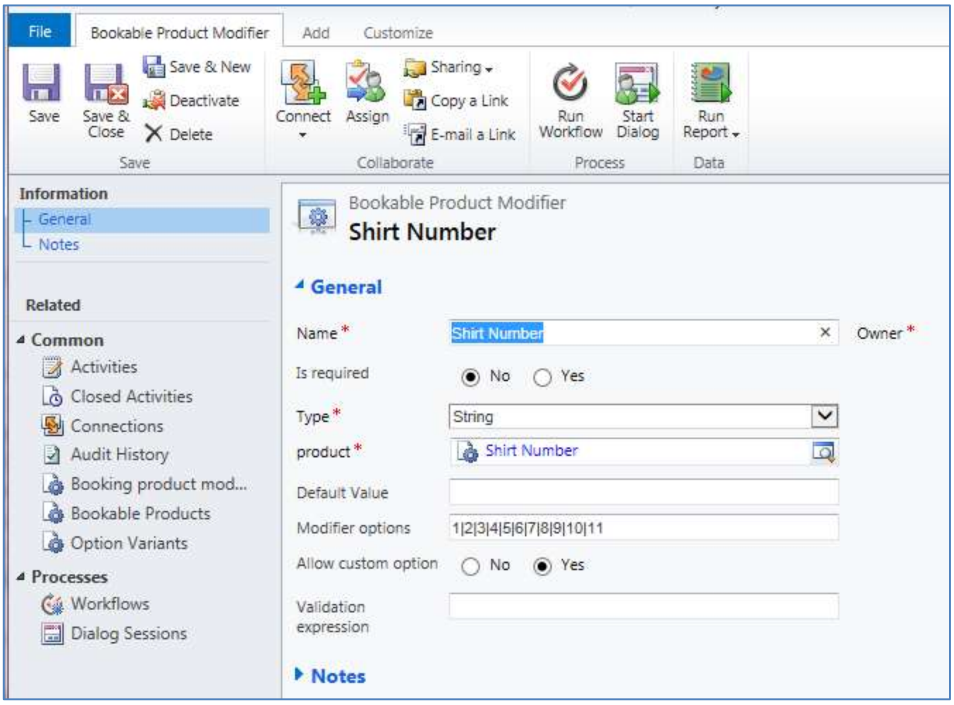
Note: Flag the product variant as **Not for sale** if you do not want to sell the modifiers associated bookable product as a separate item.

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

g) Now it is essential to create the Bookable Product Modifier. With the Bookable Product that the modifier is to be connected to open, for example a T-Shirt, select Bookable Product Modifier from the related entities menu and select the **Add Existing Bookable Product Modifier** option from the ribbon, before selecting **New** to create a new Bookable Product Modifier.



h) The Bookable Product Modifier screen will be shown as below.



The following information should be entered:

- **Name.** Capture a name for the modifier e.g. Shirt Number.

- **Is Required.** If a modifier is always to be sold with an associated bookable product, the **Yes** option should be selected. If the modifier will be offered as an optional extra with the sale of the product, the **No** option should be selected.
- **Type.** The following type options are available:
    - **Bool:** This is a Boolean type i.e. two options are offered, **Yes** or **No**. An example would be if a badge was to be sold as a product modifier, the end customer would be given the options **Yes** or **No** to buy the badge with the shirt.
    - **String:** A string would consist of characters that need to be entered. An example would be if a name was to be printed on the shirt. In the example above, numbers are entered. The numbers allowed are captured as follows 1|2|3|4| etc.
    - **Options:** An options type modifier will have an associated list of option variants which will be presented to the end customer for selection. An example would be if a different type of badge was being added to a mug, standard badge, 100th anniversary badge or special commemorative badge. **Note**: All options offered need to be set up as products and will have an associated list of option variants that will be presented to the end customer to select.
- **Product.** A product modifier must have its own associated bookable product and product variant set up as invariably a modifier will be sold for a price. Use the Look Up to select the Bookable Product which you have previously created, for example a shirt name or number.
- **Default Value.** If applicable, enter a value in the field that will be displayed on the Web or POS before any other.
- **Modifier Options.** If the modifier type **String** has been selected, the options that will be presented to the end customer should be entered here. For example a list of names to be printed on the shirt can be set up as shown below. The names should be separated with a '|' separator.

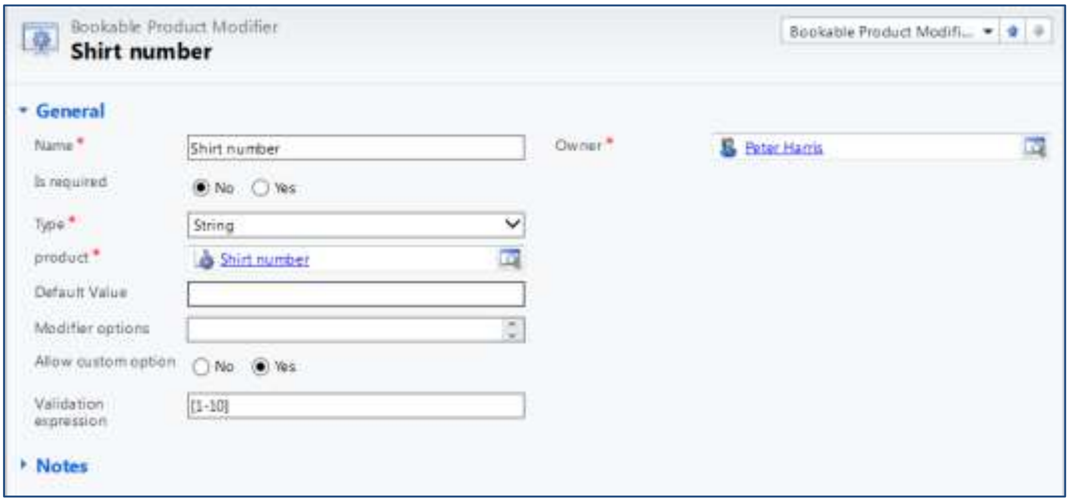
David Beckham|Robin van Persie|Gareth Bale

- **Allow custom option.** If this option is set to **Yes** for a **String** type modifier, then the end customer will be able to enter their own name instead of selecting from the list of modifier options provided. If this option is set to **No**, only the list of names entered in the modifier options field will be displayed and the end customer will not be able to capture their own name.
- **Validation expression.** If the product modifier type **String** is selected, this field can be used to enter a REGEX or Regular Expression. For example, if a number is to be entered, the expression ^[a-zA-Z]{1,10}$ can be entered to ensure that numbers between 1 and 10 are entered.

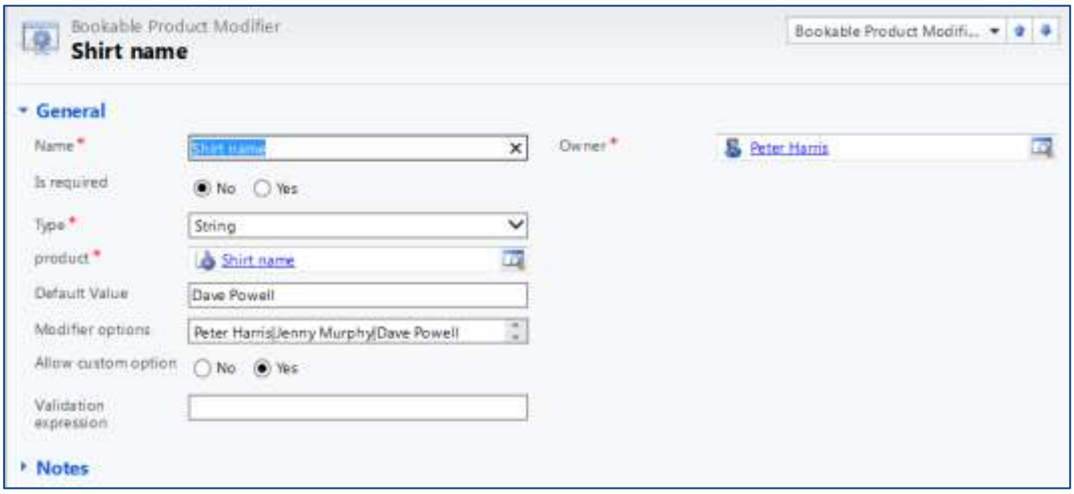
e) Select **Save and Close** on the ribbon.

MODIFIER EXAMPLES

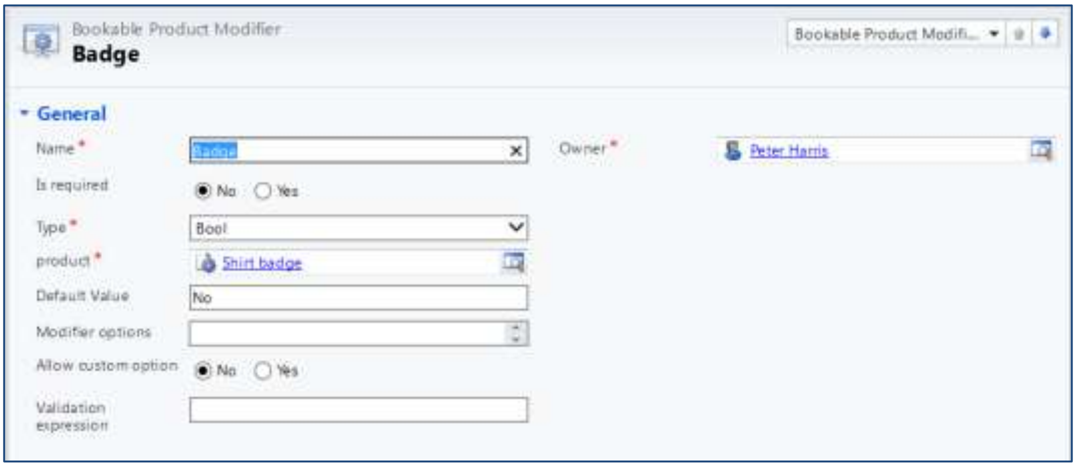
Type: String- Shirt Number:



Type: String – Shirt name:



Type: Bool– Badge:



3.5. ADDING AN IMAGE FOR THE RETAIL PRODUCT

IMAGE SIZE

CRM will always upload the images in square format (e.g. 600px by 600px) so if you want your images not to be stretched, please amend your image size to a square before uploading.

IMAGE NAMING CONVENTION

As suggested for Categories and Category Images, it is recommended that a naming convention be applied to the retail images uploaded to facilitate the management and update of images. Ensure that the name of the image describes the product and the front or back of the image if both are to be uploaded.

ADDING AN IMAGE

To add an image or images of the retail product that will be displayed on the web:

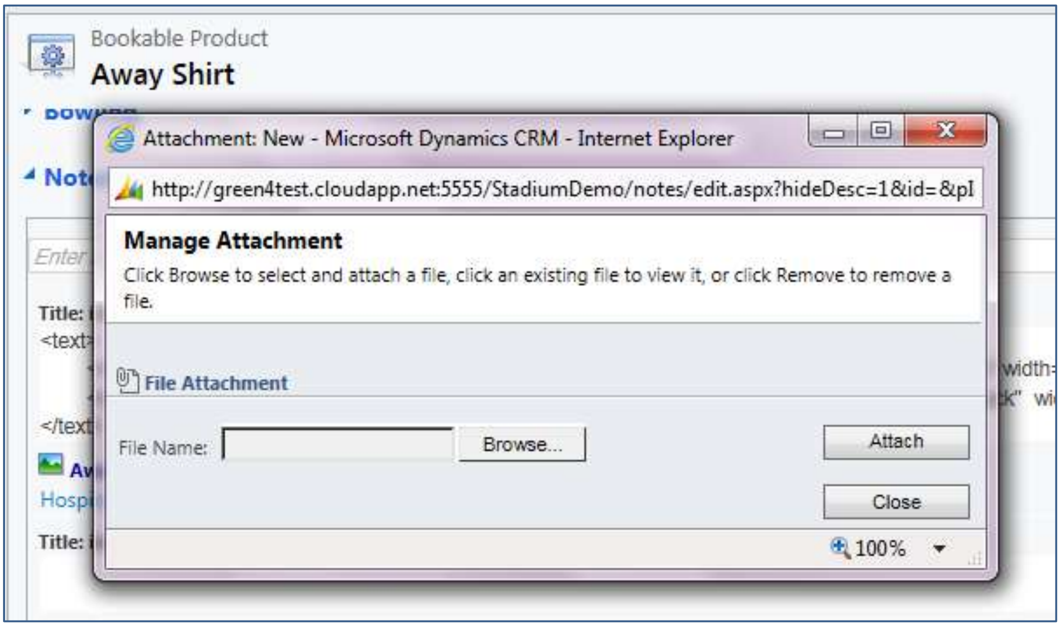
a) Navigate to **Product Management, Bookable Product**.

b) Select the bookable product that you would like to add an image for.

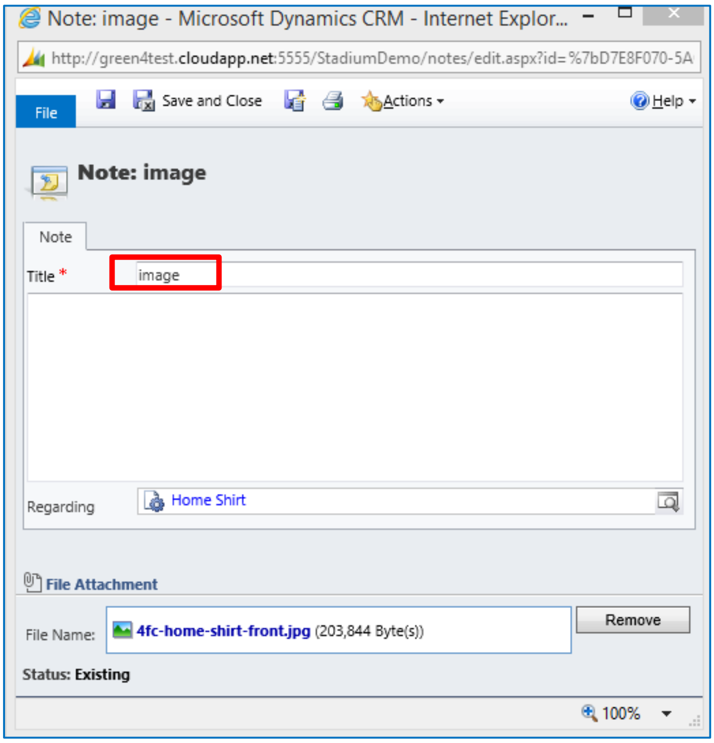
c) Navigate to the **Notes** section of the Bookable Product form. Select the Enter a Note option.

d) Select the **Attach File** button and **browse** to upload the image for the bookable product.

e) Select the browse button to find the image, select **Attach** and then **Close** when the image is uploaded.



f) Double click on the note and ensure it is entitled **image**.



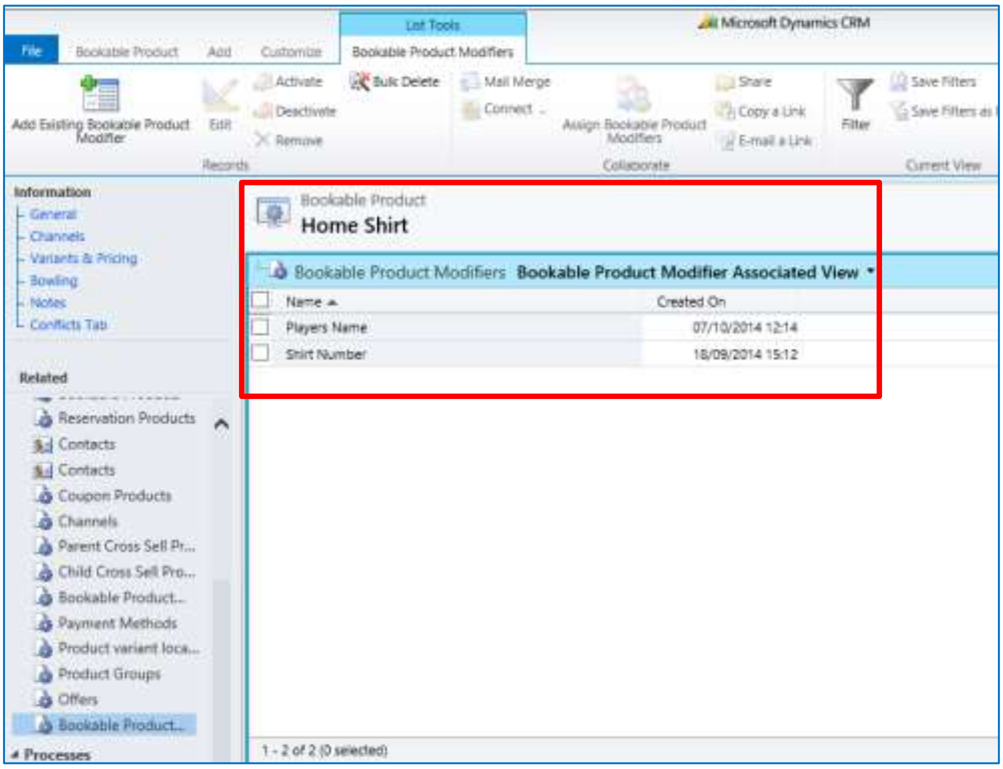
g) Select **Save and Close** on the image note.

PERSONALISED IMAGES

Product Modifiers can be used to personalise items. For example the back of a shirt can be personalised with a shirt number or shirt name such as on the product displayed below. In the example below two images have been added to the Bookable Product to be displayed on the Web, one for the front of the shirt and one for the back of the shirt.

To enable a product to be personalised the Bookable Product, for example a Home Shirt, must have Product Modifiers connected to it. To create the Bookable Product Modifiers and connect them to the Bookable Product, follow the instructions given in section [3.4. Bookable Product Modifiers](#).

In the example above, there are two Bookable Product Modifiers connected to the Bookable Product Home Shirt, these being the Shirt Number and Players Name. These are highlighted in the CRM form below:



To display the chosen name and number on the back of the shirt for the customer to view before making the purchase, an html extract should be included above the image in the **Notes** section. If there are two images, for example the front and back of the shirt the html extract only needs to be added above the image that is to be personalised. If each image is to be personalised then the html extract will need to be added above each of the images.

In the above example of a Home Shirt, only the reverse of the shirt is personalised, therefore the html has only been added above the Home-Shirt-reverse.jpg image as is highlighted below:

The html extract is as follows:

<text>

<item text="Shirt-Number" x="500" y="450" font="Superstar M54" size="200" opacity="255" pen="Black" width="2" brush="White"/>

</text>

The html extract text must be changed for each modifier that is used to display the personalisation of the product on the web. Each part of the html extract controls different aspects of the personalisation. Each part of the html extract controls the following:

- **<item text="Shirt-Number"** The item text refers to the Bookable Product Modifier. The name in brackets, in this example "Shirt-Number" is changed to the name of the Bookable Product Modifier. If the Bookable Product Modifier has two words, a hyphen must be used between the words.
- **x="500"** The x="500" is a value that can change the position of the product modifier on the image. The number in brackets, in this example "500" can be changed to position a product modifier elsewhere on the image, for example a Name or Number on a shirt.
- **y="450"** The y="450" is a value that can change the position of the product modifier on the image. The number in brackets, in this example "450" can be changed to position a product modifier elsewhere on the image, for example a Name or Number on a shirt.
- **font="Superstar M54"** The font text refers to the font that is going to be used on the web personalisation. The font in this example is "Superstar M54" and can be changed to a different font if required.
- **size="200"** The size text refers to the size of the product modifier for example, the size of a number on a shirt. The size in this example is "200" and can be changed to make the modifier larger or smaller.

- **opacity="255"** The opacity text refers to the transparency of the image. The opacity in this example is "255" and can be changed to make the image more or less transparent.
- **pen="Black"** The pen text refers to the colour of the outline of the image. The pen in this example is "Black" but can be changed to another colour if required.
- **width="2"** The width text refers to the width of the image . The width in this example is "2" but can be changed to increase or decrease the width.
- **brush="White"/>** The brush text refers to the background colour that is displayed behind the image. The brush in this example is "White" but this can be changed if another background colour is required.

Each product modifier that is to be used to personalise the product must have a separate html extract. This is shown below where the example of a home shirt has two bookable product modifiers for the reverse image, one for the shirt number and one for the players' name:

Title: image-1

```
<text>
    <item text="Shirt-Number" x="500" y="450" font="Superstar M54" size="200" opacity="255" pen="Black" width="2" brush="White"/>
    <item text="Players-Name" x="500" y="800" r="525" font="Superstar M54" size="60" opacity="255" pen="Black"  width="2"
brush="White"/>
</text>
```

Home-shirt-reverse.jpg

Hospitality Administrator 21/11/2014 15:26

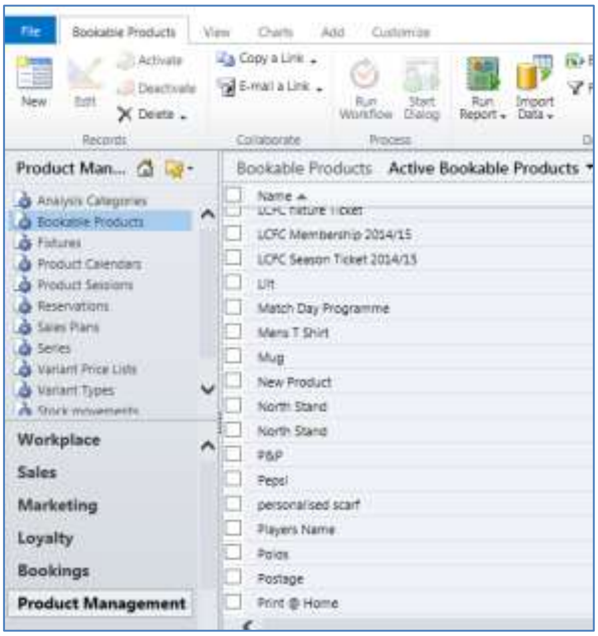
3.6. SETTING UP A BARCODE FOR A RETAIL PRODUCT

If the terminal being used to sell retail products has been set up for scanning, it is possible to scan products from the POS. To set up a barcode for a product in CRM complete the following steps:

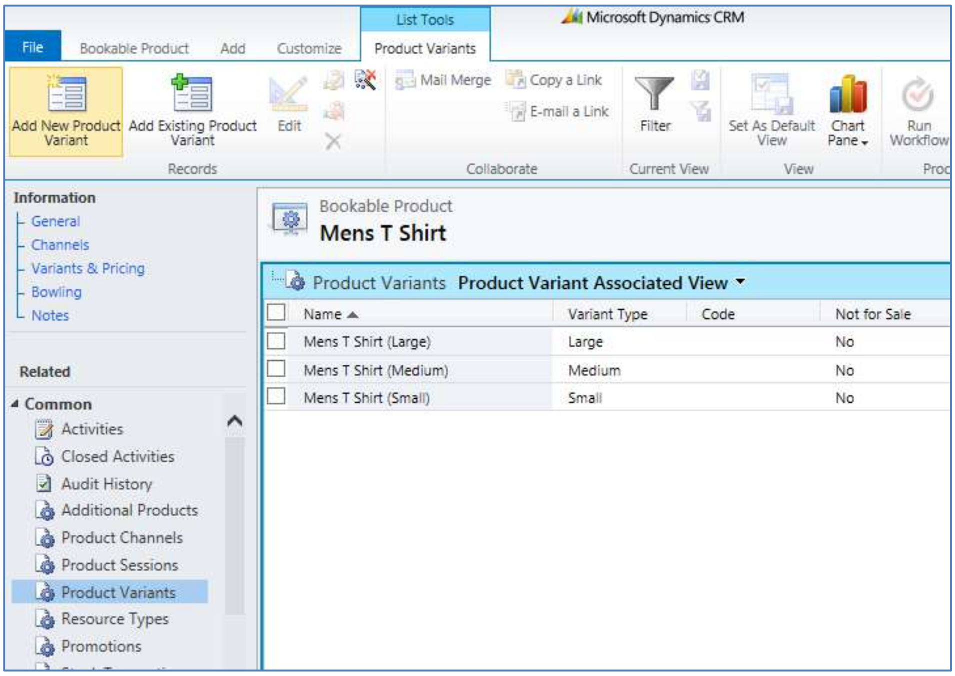
a) In the CRM **Navigation Panel** select **Product Management** followed by **Bookable Products**.

b) The Bookable Products list view will be displayed.

c) Select the Bookable Product that a barcode is to be captured for.

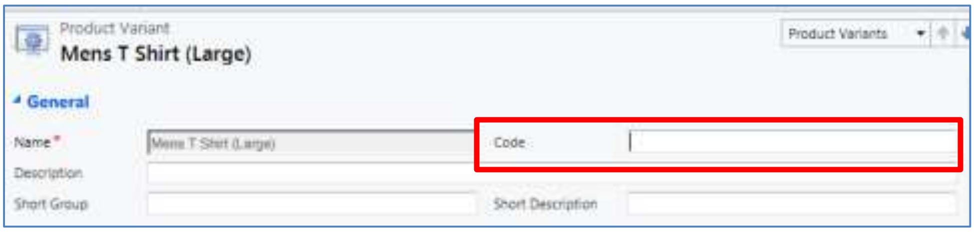


d) Open the Bookable Product and select Product Variants from the related menu as shown below. All the different variants for the product will be displayed.



e) Select the Product Variant that a barcode is to be captured for.

f) When the form is open, scan the barcode of the Product. The Code field will populate with the barcode no.



g) **Save & Close** the form. From the POS home page, if this item is scanned the product will be added to the shopping cart.

Note: A barcode will need to be captured for each variant of a product

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4. MANAGING STOCK

The facility exists to record basic stock levels of any bookable product of type **Stock** set up in the system.

Some points to note on managing stock:

- All stock products to be managed should be set up as **Bookable Stock Products** with appropriate variants and pricing before starting with stock management.
- Creating a **Stock Movement** record is the starting point for managing your stock and are recorded as an Adjustment, GRN or Transfer.
- Stock levels are increased or decreased by the **Stock Transactions** related to a Stock Movement record.
- The stock level is decreased/increased through the standard Web or POS sales operations, by the use of **Stock Transaction Records** which are automatically created whenever a bookable product stock item is sold or credited. The stock level is updated every time a stock transaction record is created. Manual stock transaction records can also be captured in CRM.
- The stock levels are maintained at a Till Group level so tracking is dependent on the set up of your terminals. Stock levels are recorded in an entity in CRM called **Product variant location stock level**.

4.1. ENABLING THE TRACKING OF STOCK

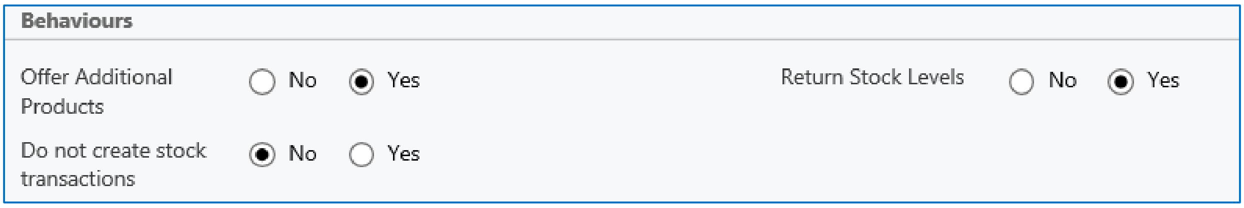
If stock levels are to be tracked and displayed for each product on the Channel, this should be set up in the Channel.

a) From the Venue Management menu option, select Channels.

b) Open the required Channel e.g. POS.

c) In the Behaviours section of the form:

  - Set the Return Stock Levels to **Yes**.
  - Set the Do not create stock transactions to **No** if you want to create stock transactions.



Note: The till group in use has to be linked to the appropriate terminal for stock levels to be displayed

4.2. STOCK MOVEMENTS

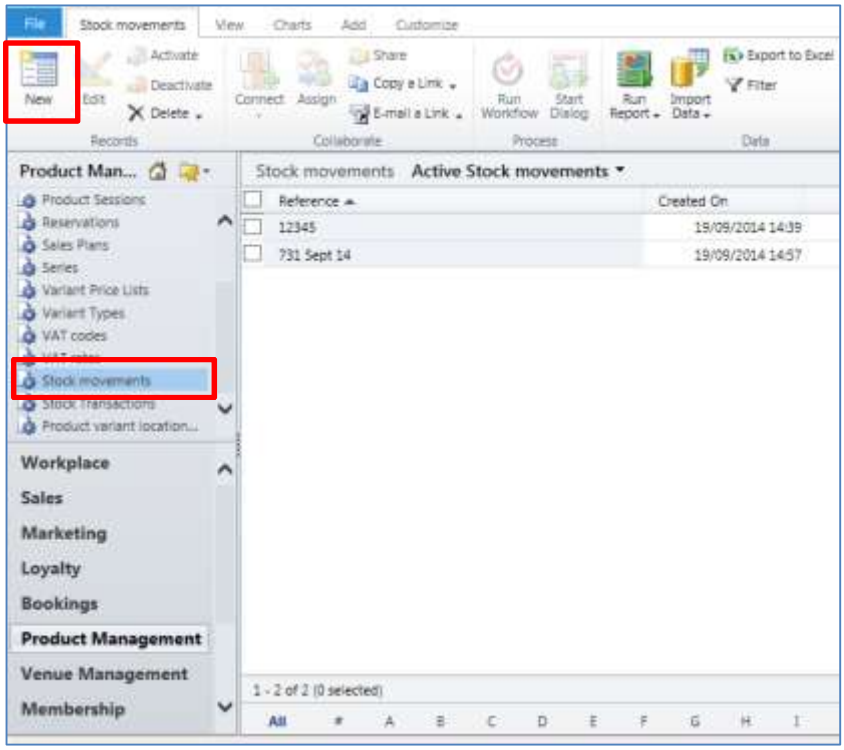
Within CRM there is a facility to increase (or decrease) the available stock figure by means of a **Stock movement**. A stock movement can be either one of the following types:

- **Adjustment:** A manual adjustment of stock to initially set stock figure for product variants, or used to set the correct figures after a stock-taking process has completed.
- **Goods received note**: Used to indicate that stock has been purchased and delivered into the organisation at the till-group level.
- **Stock transfer:** Used to indicate that stock has been moved from one till-group to another till-group. Typically this stock movement will have two transaction lines – one being negative, from the sending till group, and a positive transaction for the same amount at the receiving till-group.

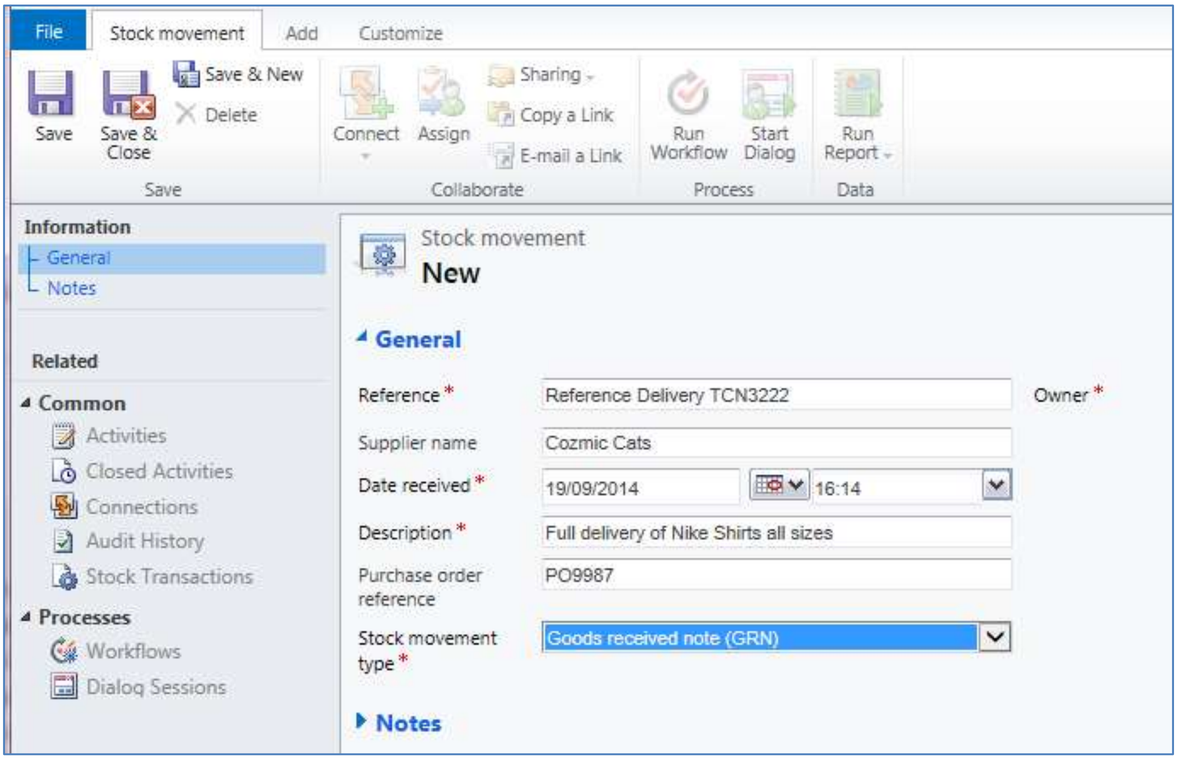
Stock Movement will consist of one or many movement lines. These movement lines are recorded as 'stock transaction' records within the system. The stock movement is the 'header' record which acts as a 'grouping' for the transaction records. To capture a Stock Movement in CRM:

a) Navigate to **Product Management** and select the menu option **Stock Movements**.

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



c) The **Stock Movement** form will open and the following details should be completed:



- **Reference**. Capture a reference in this field e.g. a delivery note reference number.
- **Supplier name.** Capture the name of the supplier of the goods, if applicable.
- **Date received**. The field will default to the date and time when the stock movement record has been created, but can be changed to the actual date and time that the physical stock was received, adjusted or transferred).
- **Description.** Enter any text that refers to the stock movement.
- **Purchase order reference.** Enter a purchase order reference number if applicable.
- **Stock movement type.** The options available are:
    - **Adjustment –** recording a manual adjustment
    - **Goods Received Note –** recording a receipt of stock ordered from a supplier
    - **Stock Transfer** – recording the transfer of stock from one till group to another

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Note: It is recommend that Bookable Stock Products are set up in the system before beginning with the management of stock.

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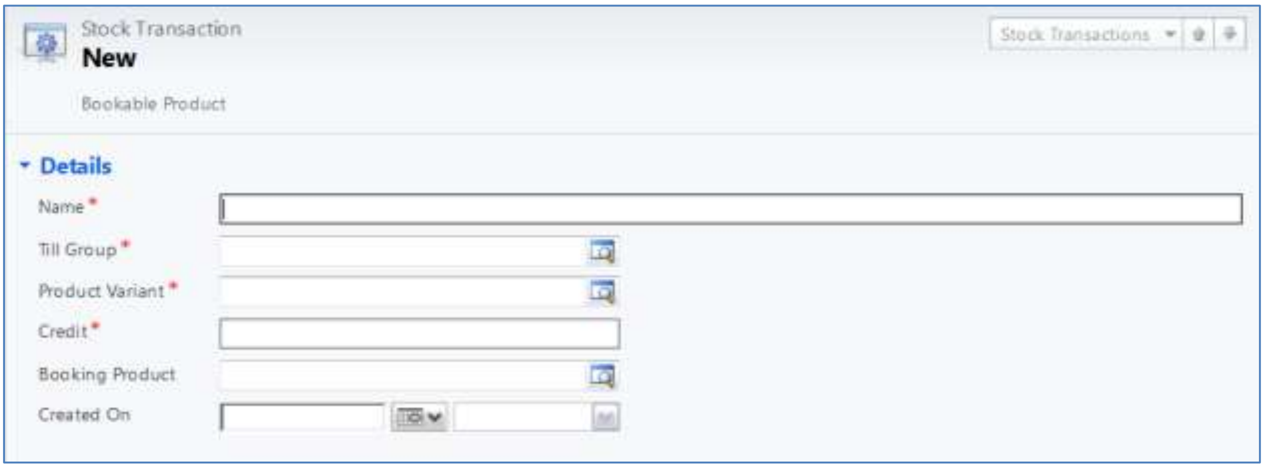
d) Select **Save and Close** on the ribbon.

4.3. STOCK TRANSACTIONS

Once a stock movement has been created and saved, stock transactions can be captured against this stock movement. Stock transactions can be manually created in CRM or are automatically created when stock is sold via a sales channel. To create a stock transaction in CRM:

a) Navigate to **Product Management** and select the menu option **Stock Transactions**.

b) Select **New** on the Ribbon.



c) Complete the following fields:

- **Name**. Enter a name for the stock transaction (e.g. Delivery received 19th September 2014).
- **Till Group**. Using the Look Up, select the Retail till group or add a new one if it does not exist. **Please note** that you must ensure that the till group is linked to the appropriate terminal for stock levels to be displayed. If not linked already this can be done by opening the selected **Till Group** before selecting **Terminals** in the Navigation area. From here, select **Add Existing Terminal** in the ribbon and add the appropriate terminal. Then return to the **Till Group** tab on the ribbon and choose **Save and Close.**
- **Product Variant**. Using the Look Up, select the relevant Product Variant. If selling a product with multiple variants you will need to create a stock transaction for each variant e.g. for each shirt size.
- **Credit**. Enter the number of stock items received or available.
- **Booking Product**. Leave this field blank as it will be automatically filled in when a stock transaction record is created to mark the purchase of the product.
- **Created On**. This field is greyed out and will be automatically populated when the record is saved.

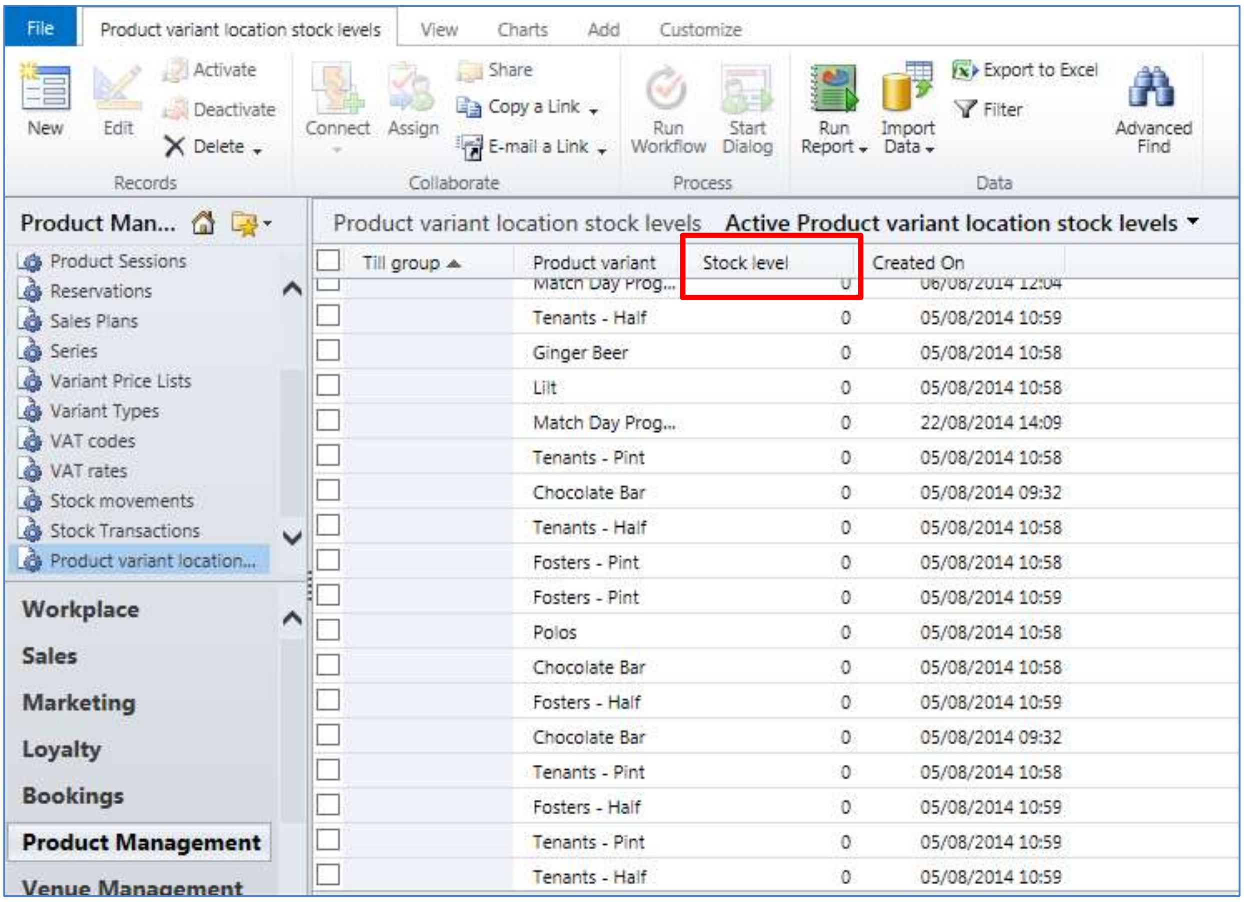
d) Select **Save & Close** on the ribbon.

4.4. PRODUCT VARIANT LOCATION STOCK LEVELS

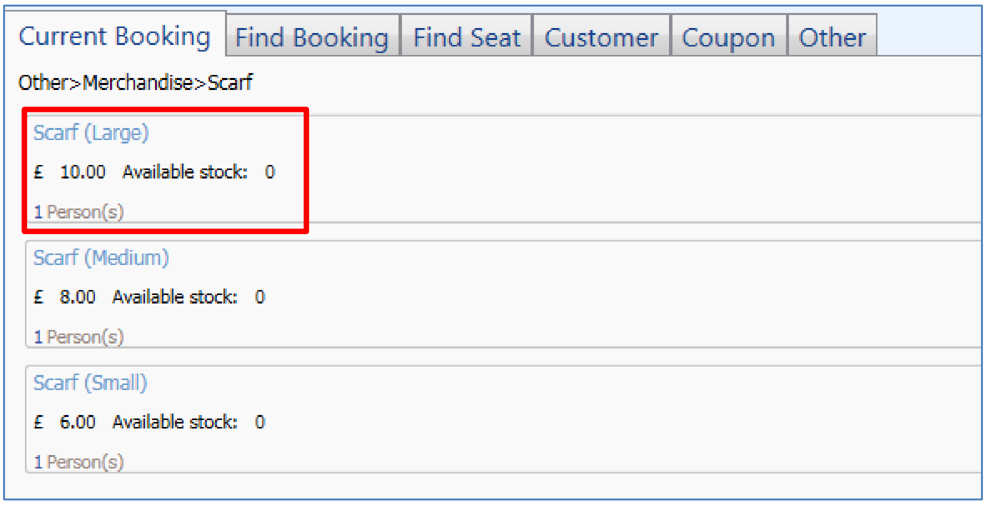
The level of stock available for each bookable product variant can be viewed at the Product Variant Location Stock Levels.

To view the stock levels of a particular stock product, navigate to **Product Management** and select the menu option **Product Variant Location Levels**.

This view will list Till Groups, associated Product Variants and their stock levels.



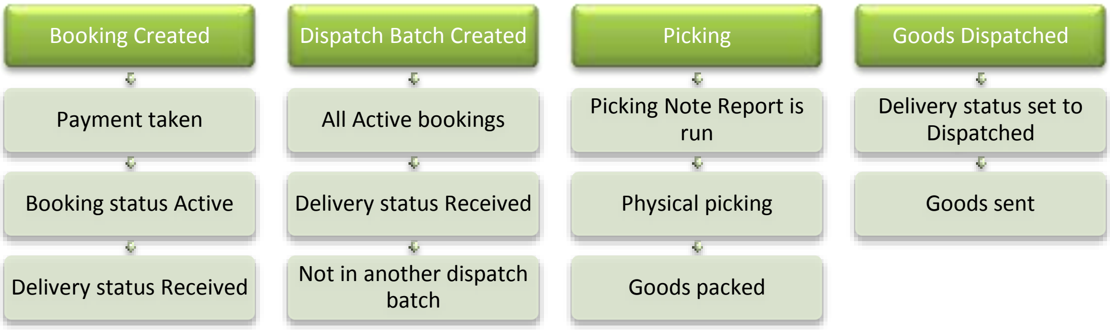
Stock levels can be viewed in the POS against the Bookable Stock Product as shown below.



Note: There is no restriction to disable the selling of a product if its available stock figure falls below 1. The product would have to manually be taken off sale in CRM.

5. PICKING AND DISPATCHING

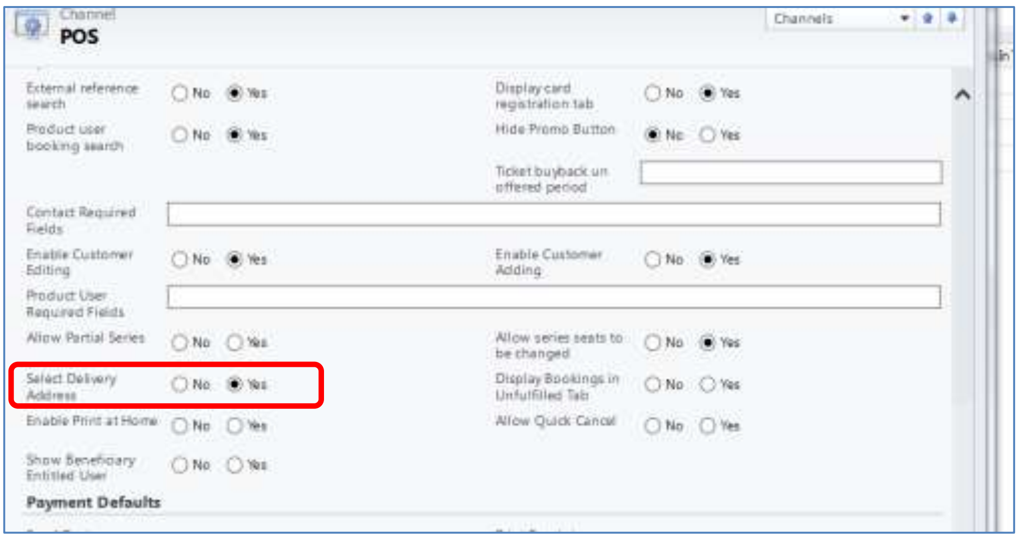
The picking and dispatching process within CRM is designed to assist organisations that have taken orders over the Web sales channel. The functionality is centred on the after sales process of picking the goods sold (as per the system booking) and dispatching the goods to the customer. An overview of the process is shown below.



- **Booking Created** - full payment has been taken via the WEB or POS channel and a full delivery address has also been submitted with the booking. The booking status is Active and the Delivery Fulfilment Status will be Received.
- **Dispatch Batch Created** - created within CRM. This batch will be associated with all Active bookings that have a delivery fulfilment status of Received AND are not associated with any other Dispatch Batch. When a Dispatch Batch has been created the Delivery Fulfilment Status of all Bookings associated to it will change to In Progress.
- **Picking –** Picking Note Report is run for the Dispatch Batch. Physical picking of the goods is undertaken and the goods are packed ready for dispatch.
- **Goods Dispatched** - All bookings that have been fully picked have their delivery fulfilment status manually set to Dispatched and the goods are sent.

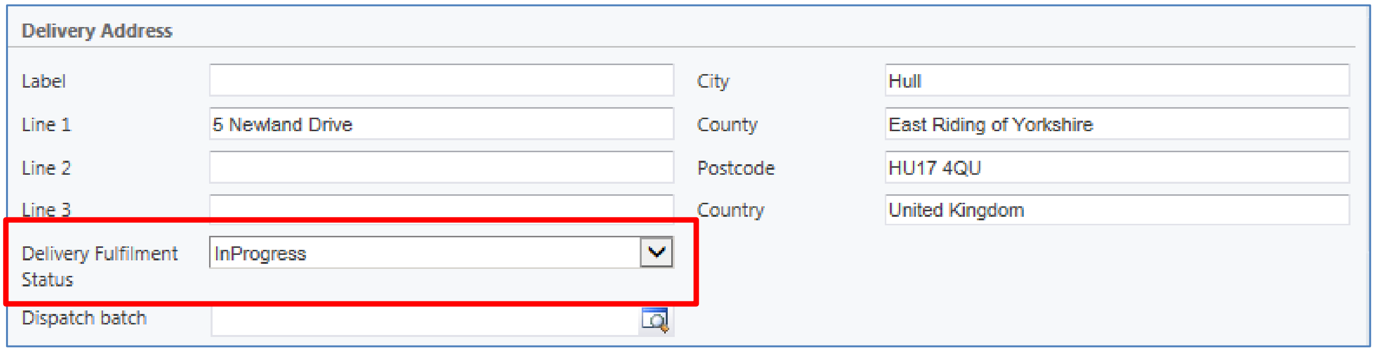
Note: To make the most of the picking and dispatching functionality, the Stock Handling and VAT procedures need to be in place. The **Select Delivery Address** option must be set for the channel which is creating the bookings.

In order for the process to work the **Select Delivery Address** option must be set for the channel which is creating the bookings as shown below.



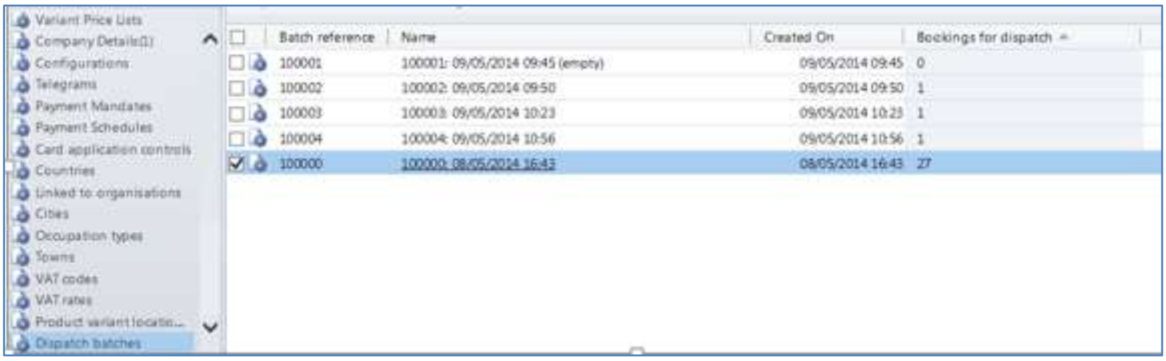
5.1. BOOKING CREATED

When the Select Delivery Address flag set to Yes, when a booking is created and payment has been taken, its **Delivery Fulfilment Status** will be set to **Received.** This can be viewed by navigating to the **Bookings** menu option and opening the booking.

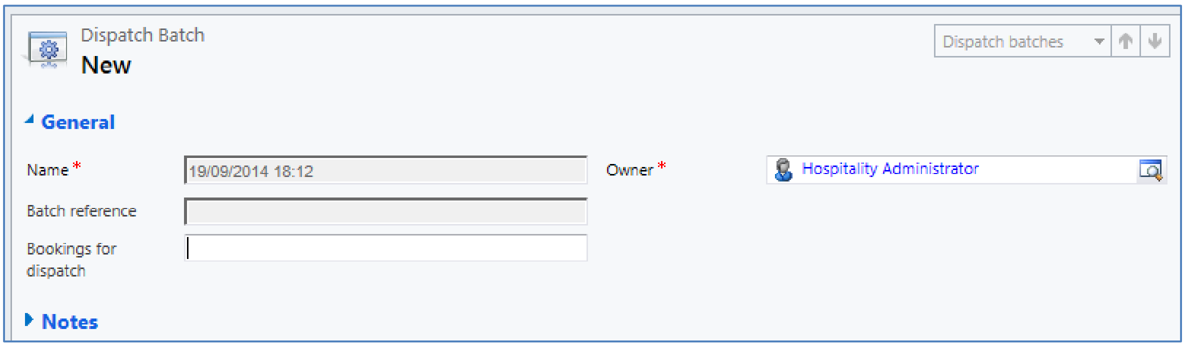


5.2. DISPATCH BATCH CREATED

a) To create a Dispatch Batch, navigate to the **Product Management** menu option and select **Dispatch Batches**. All the Active Dispatch Batches will be displayed.



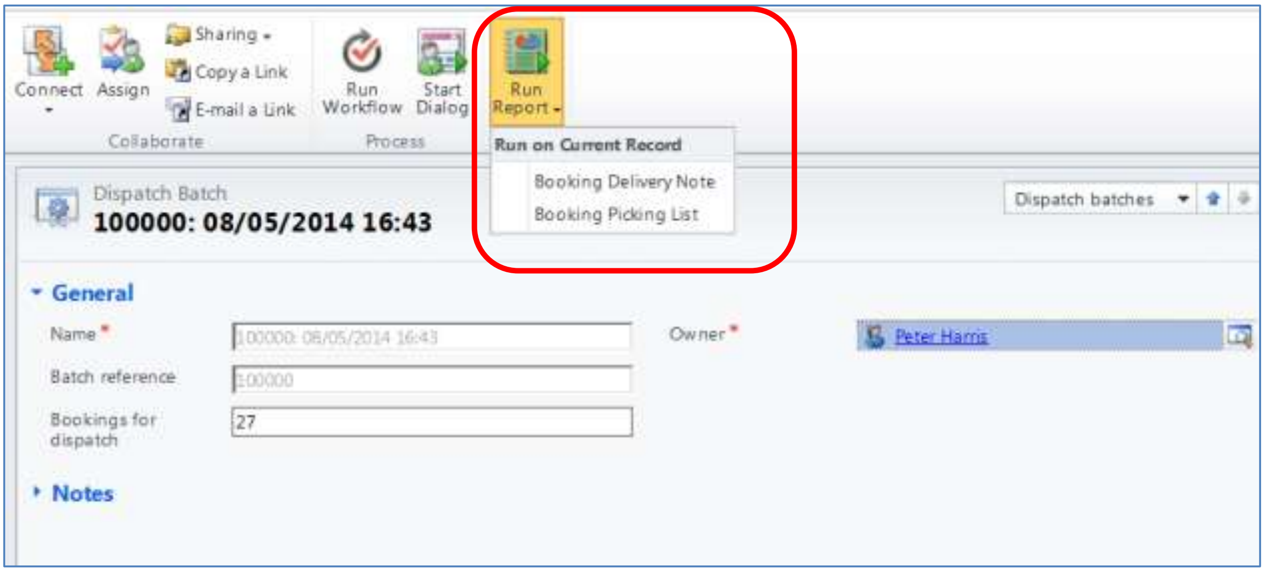
b) To create a new Dispatch Batch, select New on the Ribbon and an empty Dispatch Batch form will be opened.



c) The process of creating and saving a new **Dispatch Batch** will associate the new Dispatch Batch with all Bookings on the system which are at **Delivery Fulfilment Status – Received**, **BUT** are not associated with any other Dispatch Batch records.

5.3. PICKING

Once the Dispatch Batch has been created, by clicking on the Dispatch Batch, you can either print an output of **Picking notes** or **Dispatch notes** by selecting a report to run:



Using this example you would get 27 picking notes produced, (see sample note below):

Picking List

Customer details:

Peter Harris

74 Ainsdale Road

Date: 09/05/2014

Booking reference: 1031089, order 09/05/2014 10:54:02

Dispatch reference: 100004

Booking total: £28.50

Code	Product	Qty.	Location
HOME-3455-555	Mens Shirts (Each) Badge: Yes	1	111111
HOME-3455-555	Mens Shirts (Each) Shirt name: Jenny Murphy, Shirt number: 10	1	111111

Notes:

The **Code** is the SKU (stock keeping unit) code which was entered against the **Product Variant** and the location is the **Till Group** where the stock can be found to pick and fulfil this booking.

5.4. GOODS DISPATCHED

Once the picking has been completed and the goods made ready for posting or delivery, a Delivery Note report can be run to include in the deliveries. The **Delivery Fulfilment Status** in the booking record can be set to **Dispatched**. The Dispatch Batch field will be auto populated when the Dispatch Batch is created.

End of Document