

## CRM DRIVEN SOLUTIONS FOR SPORT & LEISURE

### FOOD & BEVERAGE- MEAL DEALS



**Microsoft** Partner  
Gold Independent Software Vendor (ISV)

## CONTENTS

About this Document.....	4
Non-Disclosure .....	4
Copyright .....	4
Document Control .....	4
Contact.....	5
Introduction.....	6
Setting up Meal Deals in CRM .....	6
1. Creating a Meal Deal that consists of a Specific Product but no Specific Variants. ....	7
Step 1. Create the Variant Type (Deal) .....	7
Step 2. Create the Variant Price List .....	9
Step 3. Set Up your Channel Price Lists .....	9
Step 4. Create the Meal Deals Bookable Product.....	11
Overview .....	14
The Meal Deal in the POS .....	15
2. Creating a Meal Deal that consists of a Combination of Products with any Variants and Product specific Variants.....	17
Step 1. Create the Variant Type (Deal) .....	17
Step 2. Create the Variant Price List .....	19
Step 3. Set Up your Channel Price Lists .....	20
Step 4. Create the Meal Deals Bookable Product.....	21
Step 5. Create Bookable Products that are to be part of the Meal Deal.....	25
Step 6. Create a Bookable Product to link to the Bookable Product Modifier .....	28
Step 7. Create Bookable Product Modifier .....	29
Step 8. Create the Option Variants.....	31
Overview .....	34
The Meal Deal in the POS .....	35
3. Creating a Meal Deal that consists of products and Specific Variants of all Products. ....	38
Step 1. Create the Variant Type (Deal) .....	38
Step 2. Create the Variant Price List .....	40
Step 3. Set Up your Channel Price Lists .....	41
Step 4. Create the Meal Deals Bookable Product.....	42
Step 5. Create Bookable Products that are to be part of the Meal Deal.....	46

Step 6. Create the Bookable Products Types.....	49
Step 7. Create Bookable Product Modifiers .....	52
Step 8. Create the Option Variants.....	54
Overview .....	57
The Meal Deal in the POS .....	58
4. Setting Up Optional Extras to add to a Meal Deal.....	61
Step 1. Create the Optional Extra as a Bookable Product .....	61
Step 2. Linking the Optional Extra to the Meal Deal as a Bookable Product Modifier.....	64
Overview .....	71
5. Meal Deal Reports .....	72

## ABOUT THIS DOCUMENT

This document has been prepared as a User Guide for setting up Meal Deals in CRM and how to purchase them in the POS.

## NON-DISCLOSURE

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## DOCUMENT CONTROL

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## INTRODUCTION

This functionality has been developed to give the operator the ability to select individual products as part of a meal deal. For example a Meal Deal may consist of a Pie, a Pint and a Snack. Now the User will be able to select from a list, the specific components of the meal deal, such as the type of Pie, the type of Pint and the type of Snack. Additionally, Optional Extras can be added to a Meal Deal.

## SETTING UP MEAL DEALS IN CRM

Meal deals can be created within CRM in a number of different ways depending upon how the meal deals are to be sold. The below table demonstrates the many different ways meal deals can be configured in the Green 4 system:

No.	Configuration	Comments
1	The Meal Deal consists of a specific product(s) but no specific variant(s)	<p>For example the Meal Deal could be made up of:</p> <ul style="list-style-type: none"> <li>➤ 4 Pints of Beer and 4 Pies</li> </ul> <p>Or</p> <ul style="list-style-type: none"> <li>➤ 3 Pints of Beer</li> </ul> <p>This is accomplished by creating a standard bookable product with one associated Variant (The deal) e.g. A Burger and a Pint Meal Deal</p>
2	The Meal Deal consists of a combination of products with any variant and product specific variants	<p>For example the Meal Deal could be made up of:</p> <ul style="list-style-type: none"> <li>➤ A pint of Carling and a pie</li> </ul> <p>Or</p> <ul style="list-style-type: none"> <li>➤ A pint of Carling and a hotdog</li> </ul> <p>Or</p> <ul style="list-style-type: none"> <li>➤ A pint of Carling and a burger</li> </ul> <p>For this type of Meal Deal to be created, the bookable product must have a Product Modifier and Option Variants attached to it.</p> <p>However, the specific type of pint (e.g. a Carling, Fosters or Carlsberg) or pie (chicken, steak or vegetable) or chocolate bar (Snickers, Twix or Kit Kat) cannot be selected with this type of scenario.</p>
3	The Meal Deal consists of products and specific variants of all products	<p>This means the end customer will be able to choose what each component of the Meal Deal consists of, for example the meal deal could be made up of:</p> <ul style="list-style-type: none"> <li>➤ A Pie, Pint and a Chocolate Bar</li> </ul> <p>But the end customer can choose what type of pie, pint or chocolate bar they would like, for example:</p> <ul style="list-style-type: none"> <li>➤ The pie could be chicken, steak or vegetable</li> </ul>

		<ul style="list-style-type: none"> <li>➤ The pint could be a Fosters, Carlsberg or Guinness</li> <li>➤ The chocolate bar could be a Kit Kat, Twix or Snickers.</li> </ul>
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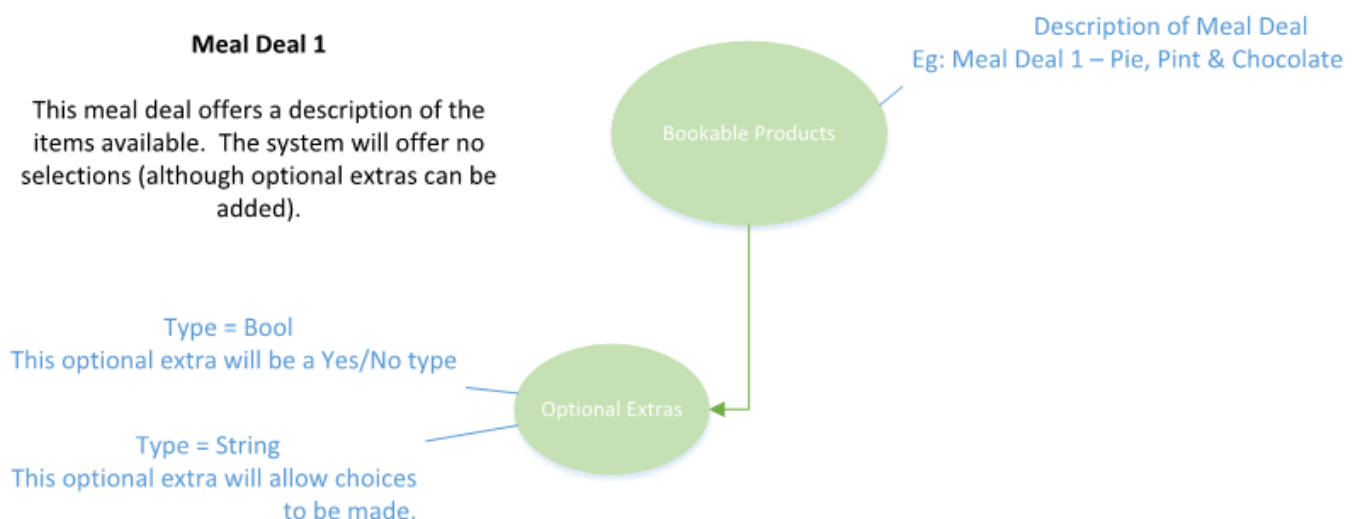


**Note:** Meal Deals do not down the stock of the components that make up the meal deal

## 1. CREATING A MEAL DEAL THAT CONSISTS OF A SPECIFIC PRODUCT BUT NO SPECIFIC VARIANTS.

This type of Meal Deal gives the operator or customer no choice on selecting the specific products that are to be part of the meal deal but instead gives a single broad option of a certain Meal Deal.

To create this type of Meal Deal it can be accomplished by setting up a standard bookable product, with one associated variant (Deal) type. The diagram below demonstrates how this type of Meal Deal can be created.

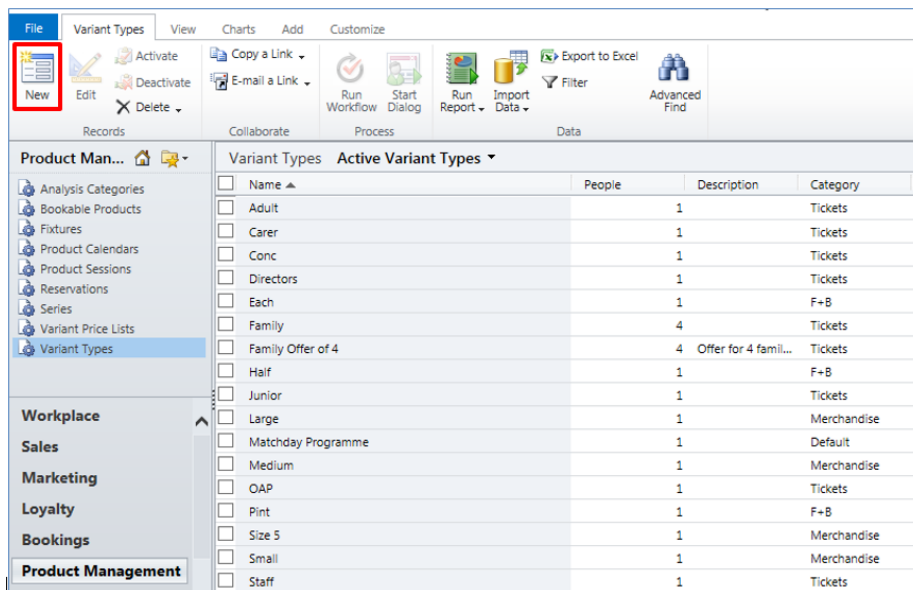


### STEP 1. CREATE THE VARIANT TYPE (DEAL)

Variant Types describe the type of Bookable Product that you can purchase. For example a type of drink bookable product may have a variant types of a pint and half pint or a type of food may have a variant type of each whilst a Meal Deal will need a Variant Type of Deal.

To create the Variant Type for the Meal Deal complete the following:

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



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

The screenshot shows the 'New Variant Type' form. The 'General' tab is selected. The form contains the following fields:

- Name \***: Text input field.
- People \***: Text input field.
- Translated name**: Text input field.
- Description**: Text input field.
- Skidata Class Code**: Text input field.
- Category**: Dropdown menu.
- Voucher Value**: Text input field with a currency symbol (£).
- Tariff Code**: Text input field.
- Sequence**: Text input field.
- Conversion Factor**: Text input field.

- **Name.** Enter a name for the variant type for example, Deal.
- **People.** Enter the number of people included in the variant type. For F&B Meal Deals this is usually 1.
- **Translated Name.** This field is used when the system is being translated into another language. Multiple translations can be added in the one field.
- **Description.** Enter a description of the variant type.
- **Skidata Class Code.** Used for access control.
- **Category.** Used to group the variant types into categories for reporting purposes and for use in the price list editor. For example soft drinks, beers, spirits, chocolate bars, Meal Deals etc.
- **Voucher Value.** Used for voucher variants.
- **Tariff Code.** This is not used for F&B.
- **Sequence.** Used to display a certain sequence of Variant Types.
- **Conversion Factor.** Used to convert the cost of a large batch of products into the cost of individual products within this batch. For example, if a barrel of draft beer is purchased the conversion factor will be used to convert the cost of the barrel into a single pint of beer.

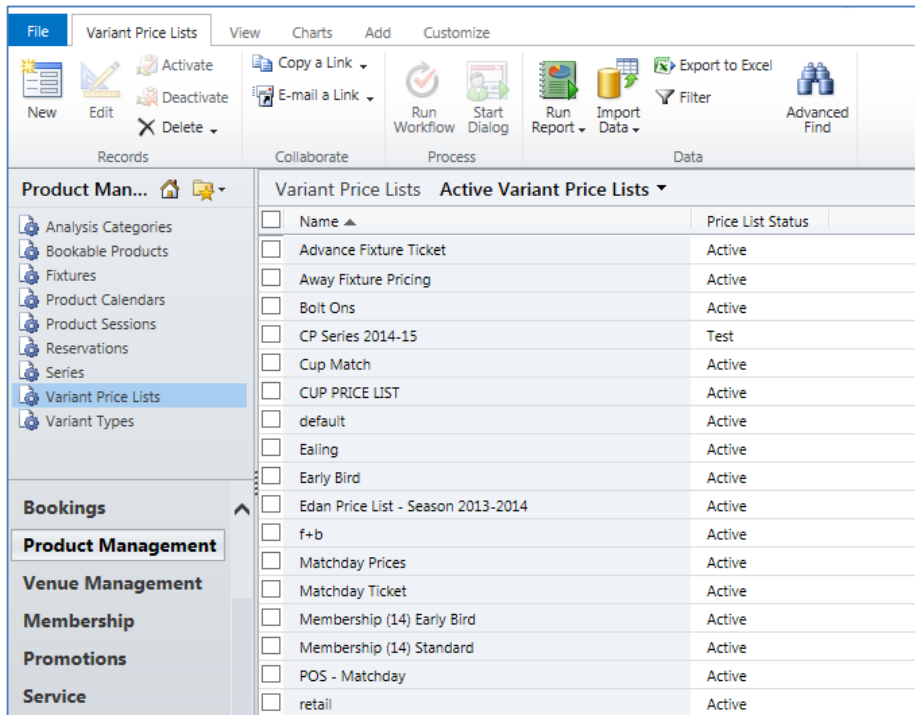
e) Select **Save and Close** on the ribbon to save the changes made.



## STEP 2. CREATE THE VARIANT PRICE LIST

Prices are defined using Variant Price Lists, which are subsequently linked to the channel using the channel price list entity.

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



- If a suitable price list exists, double-click over the appropriate row in the list. Alternatively select **New** on the ribbon to create a new variant price list.
- The Variant Price List form will be displayed. If creating a new variant price list, enter the following details:
  - Name.** Enter a name for the price list, for example Meal Deals.
  - Price List Status.** Select the price list status from the drop-down list. Ensure that the price list status is set to **Active**.
- Select **Save and Close** on the ribbon.

## STEP 3. 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 for the Meal Deal:

- On the CRM navigation panel, select **Sales Plan** on the **Product Management** tab.
- A list of sales plans matching the view criteria will be displayed.
- Open the **Default Sales Plan** (the default sales plan should be linked to the company details record in CRM).

- d) Select **Channel Price List** in the form navigation area.
- e) A list of channel price lists that have been previously linked to the variant price list will be shown. Select **Add New Channel Price List** on the ribbon.
- f) A blank channel price list form will be displayed. Complete the following details:
- **Name.** The name of the channel price list.
  - **Channel.** Select the Look Up icon alongside the field. The Look Up Records dialog will be displayed. Select the appropriate channel before clicking **OK** to continue.
  - **On Sale Date.** Enter the date and time when the price list will be available for use by the channel. An On Sale Date must be entered when creating a price list for stock products.
  - **Marketing List.** If applicable, select the marketing list the channel price list relates to. If a marketing list is applied to a channel price list, only contacts that have been added to the marketing list will use the channel price list. This option can be used to give beneficial prices to people that have previously bought a particular product, for example a membership product. Preferential pricing can either be driven by the use of a different variant price list, or by entering a discount percent.
  - **Discount Percent.** If 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.

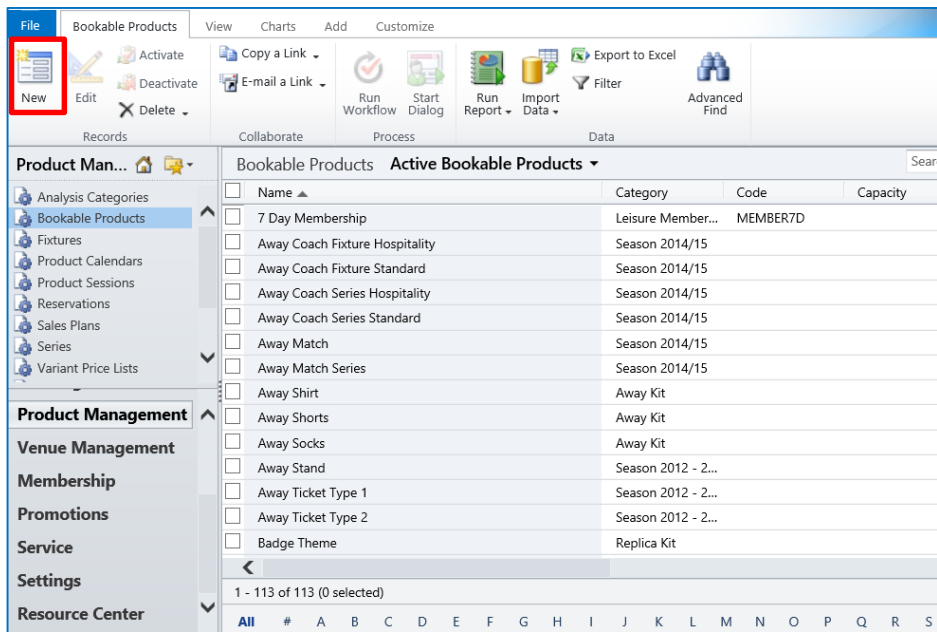
A channel price list will need to be created for each Variant Price List – Channel combination created.

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

#### STEP 4. CREATE THE MEAL DEALS BOOKABLE PRODUCT

The Bookable Product entity is used to represent products that are sold, for example the Meal Deal itself. For each Meal Deal that you are selling through the system (i.e. A Burger and Pint of Fosters Meal Deal) you must create a Bookable Product.

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



- Select **New** on the ribbon (highlighted above).
- A blank Bookable Product form will be displayed:

**Bookable Product New**

**General**

Name \*

Translated Name

Description

Cross Sell Product Description

Type  Sequence

Availability  Beneficiary Requirement

Is Course ☐ No ☐ Yes Capacity

Ask Booking Questions ☒ No ☐ Yes Report Category

Is Single Booking ☒ No ☐ Yes Code

Status **Active**

- Complete the following details:

#### General:

- **Name.** Enter a name for the product. The name will be visible to operator and should therefore reflect the nature of the product. For example a Burger and a Pint of Fosters Meal Deal
- **Translated Name.** Used for translated implementations.
- **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.
- **Sequence.** If applicable, enter a sequence number for the product. The sequence number is used to determine the order in which products are displayed in the POS and Web channels.
- **Beneficiary Requirement.** Use the drop-down list to select if a customer's name is required when the product is purchased. For stock products this option should be set to **Not Required**.
- **Report Category.** Can be used for reporting purposes to categorise the products sold through Green 4 F&B.
- **Code.** Can be used to enter the barcode for products sold through the Green 4 F&B POS.
- **Is Anonymous.** Select **Yes** if the purchaser is not required to provide a name when buying the product. The channel must be set up to anonymous purchases also.
- **Available Offline.** Select **Yes** if the bookable product is to be available for purchase through the offline POS. This option cannot be used for products that require capacity to be monitored.
- **Meal deal.** Select **Yes**, to show that this is a Meal Deal product. This is then used for reporting purposes.

#### Referring Entities:

- **Category.** Use the Look Up Records dialog to select the product category. The category is used to group products, for example Meal Deals, alcoholic drinks, soft drinks etc.
- **Product Calendar.** Select the default product calendar.

#### Membership:

- **Is Membership.** Select **No**.

#### Time Settings:

- **Available Date From.** Enter the date the product goes on sale.
- **Available Date To.** Enter the date the product is removed from sale.
- **Available Time From.** Enter the time the product goes on sale.
- **Available Time To.** Enter the time the product is removed from sale.

#### Delivery Options:

- **Print At Home.** Select **No** for F&B products.
- **Requires Delivery.** Select **No** for F&B products.



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

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

- 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). Please note that this must be the same Variant Price List that was selected in the Channel Price List.

- Enter the pricing (peak and off peak) information for each of the variants that are to be included on the price list. The same price should be entered in both the Peak and off Peak fields.

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

## OVERVIEW

Task	Completed?	Comments
Created Variant Types		Create the type of Bookable Product you can purchase. For example a type of Meal Deal Bookable Product may have a variant types of Deal
Created Variant Price Lists		Prices are defined using Variant Price Lists in the Bookable Product form and is linked to the Channel Price List
Created a Channel Price List		<p>The channel price list should be linked to the default sales plan</p> <p>The channel price list should link the channels to the variant price list on which prices have been entered.</p> <p>Ensure the channel price list dates are valid.</p> <p>A channel price list will need to be created for each Variant Price List – Channel combination created.</p>
Create a stock Bookable Product		<p>Ensure the Bookable Product Type is set as Stock</p> <p>Ensure the Meal Deal flag is set to Yes</p> <p>Ensure a category for example, Meal Deal, has been entered</p>
Assigned Channels to the Bookable Product		Ensure the relevant channel check boxes are ticked.
Assigned the variant (Deal) to the bookable product		Ensure the variant (Deal) is listed.
Assigned prices to the Bookable Product		Prices should be added to an active Variant Price List that has been linked to a Channel Price List.



- c) This will add the Meal Deal straight to the shopping cart area as the operator has no choice in selecting the specific products that are to be part of the Meal Deal.

Customer

Select Customer

Reference No.:

Name	Unit	Qty	Line		
A Burger and a Pint of Fosters Meal Deal (Deal)	£5.00	1	£5.00	X	Reduce

Discount And Promos

Beneficiaries

Speed Checkout

Total Price	£5.00	Add Comment	Print Wizard	Promotion
Total to pay	£5.00			

Close

Print Tickets

Add Payment

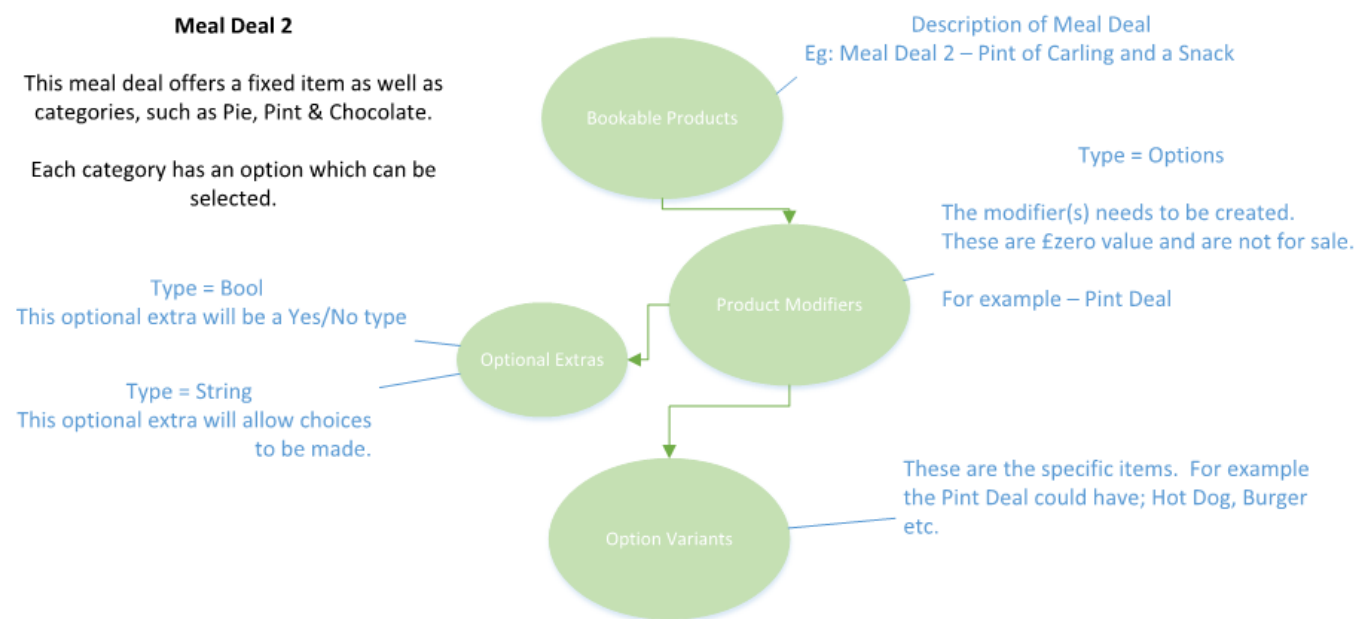
- d) Select **Add Payment** to complete the purchase of the Meal Deal.



## 2. CREATING A MEAL DEAL THAT CONSISTS OF A COMBINATION OF PRODUCTS WITH ANY VARIANTS AND PRODUCT SPECIFIC VARIANTS

This type of Meal Deal allows the deal to consist of a combination of products that can be chosen by the operator. For example a Meal Deal may consist of a pint of Carling with a choice of food to make up the deal. Therefore there may be a deal of a pint of Carling and a hot dog, a pint of Carling and a burger or a pint of Carling and a pie. For this type of Meal Deal to be created, the bookable product must have a Product Modifier and Option Variants attached to it.

The diagram below demonstrates how this type of Meal Deal can be created.



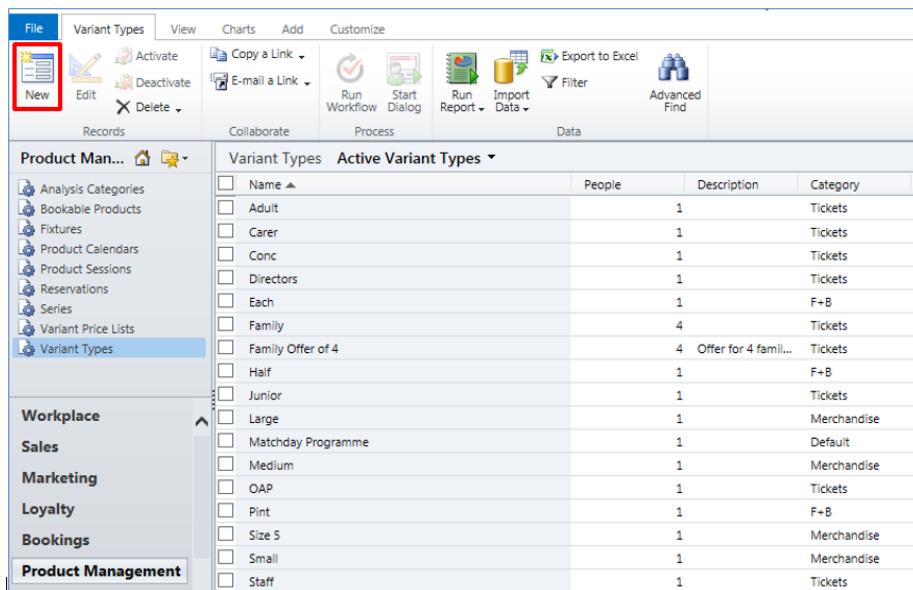
To create such a Meal Deal, complete the following:

### STEP 1. CREATE THE VARIANT TYPE (DEAL)

Variant Types describe the type of Bookable Product that you can purchase. For example a type of drink Bookable Product may have a variant types of a pint and half pint or a type of food may have a variant type of each whilst a Meal Deal will need a Variant Type of **Deal**.

To create the Variant Type for the Meal Deal complete the following:

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



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

The screenshot shows the 'New Variant Type' form. The 'General' tab is selected. The form contains the following fields:

- Name \***: Text input field.
- People \***: Text input field.
- Translated name**: Text input field.
- Description**: Text input field.
- Skidata Class Code**: Text input field.
- Category**: Text input field with a dropdown arrow.
- Voucher Value**: Text input field with a currency symbol (£).
- Tariff Code**: Text input field.
- Sequence**: Text input field.
- Conversion Factor**: Text input field.

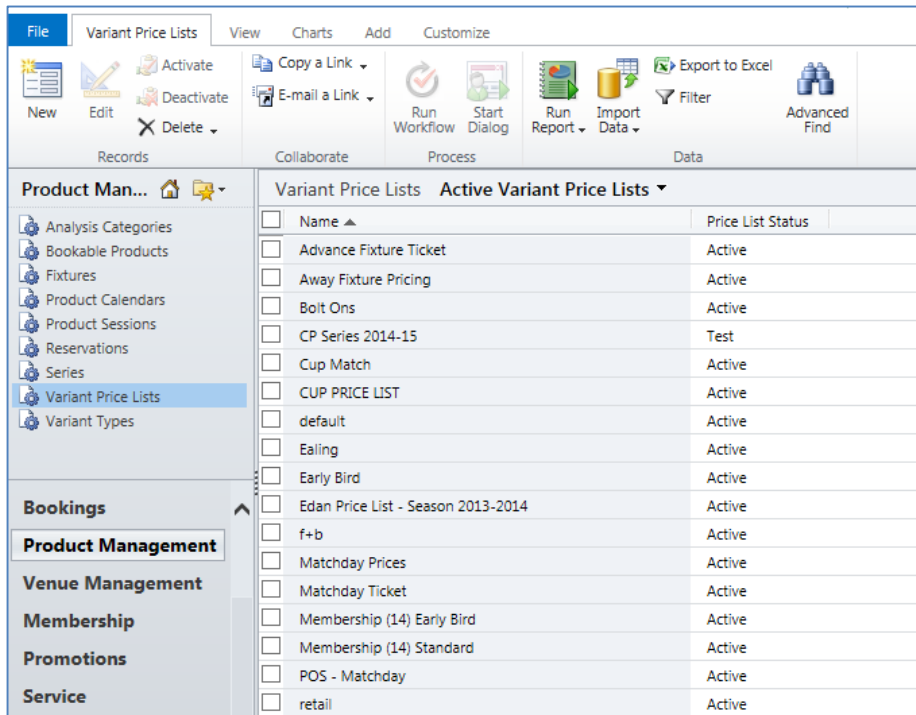
- **Name.** Enter a name for the variant type for example, Deal.
- **People.** Enter the number of people included in the variant type. For F&B Meal Deals this is usually 1.
- **Translated Name.** This field is used when the system is being translated into another language. Multiple translations can be added in the one field.
- **Description.** Enter a description of the variant type.
- **Skidata Class Code.** Used for access control.
- **Category.** Used to group the variant types into categories for reporting purposes and for use in the price list editor. For example soft drinks, beers, spirits, chocolate bars, Meal Deals etc.
- **Voucher Value.** Used for voucher variants.
- **Tariff Code.** This is not used for F&B.
- **Sequence.** Used to display a certain sequence of Variant Types.
- **Conversion Factor.** Used to convert the cost of a large batch of products into the cost of individual products within this batch. For example, if a barrel of draft beer is purchased the conversion factor will be used to convert the cost of the barrel into a single pint of beer.

f) Select **Save and Close** on the ribbon to save the changes made.

## STEP 2. CREATE THE VARIANT PRICE LIST

Prices are defined using Variant Price Lists, which are subsequently linked to the channel using the channel price list entity.

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



- If a suitable price list exists, double-click over the appropriate row in the list. Alternatively select **New** on the ribbon to create a new variant price list.
- The Variant Price List form will be displayed. If creating a new variant price list, enter the following details:
  - Name.** Enter a name for the price list, for example Meal Deals.
  - Price List Status.** Select the price list status from the drop-down list. Ensure that the price list status is set to **Active**.
- Select **Save and Close** on the ribbon.

### STEP 3. 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 for the Meal Deal:

- a) On the CRM navigation panel, select **Sales Plan** on the **Product Management** tab.
- b) A list of sales plans matching the view criteria will be displayed.
- c) Open the **Default Sales Plan** (the default sales plan should be linked to the company details record in CRM).
- d) Select **Channel Price List** in the form navigation area.
- e) A list of channel price lists that have been previously linked to the variant price list will be shown. Select **Add New Channel Price List** on the ribbon.
- f) A blank channel price list form will be displayed. Complete the following details:
  - **Name.** The name of the channel price list.
  - **Channel.** Select the Look Up icon alongside the field. The Look Up Records dialog will be displayed. Select the appropriate channel before clicking **OK** to continue.
  - **On Sale Date.** Enter the date and time when the price list will be available for use by the channel. An On Sale Date must be entered when creating a price list for stock products.
  - **Marketing List.** If applicable, select the marketing list the channel price list relates to. If a marketing list is applied to a channel price list, only contacts that have been added to the marketing list will use the channel price list. This option can be used to give beneficial prices to people that have previously bought a particular product, for example a membership product. Preferential pricing can either be driven by the use of a different variant price list, or by entering a discount percent.
  - **Discount Percent.** If 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.

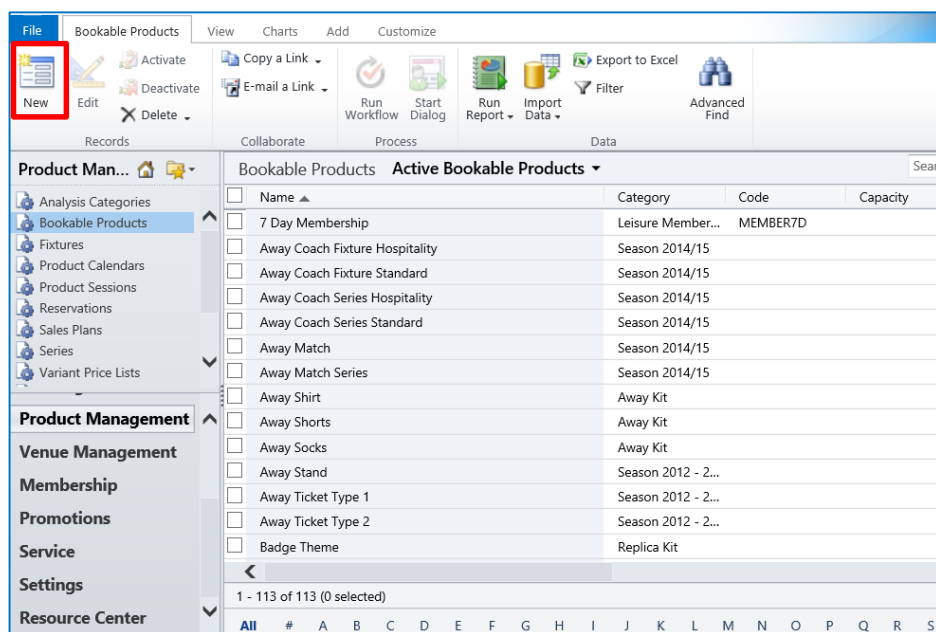
A channel price list will need to be created for each Variant Price List – Channel combination created.

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

#### STEP 4. CREATE THE MEAL DEALS BOOKABLE PRODUCT

The Bookable Product entity is used to represent products that are sold, for example the Meal Deal itself. For each Meal Deal that you are selling through the system you must create a Bookable Product. In the example being used a Bookable Product of A pint of Carling with food Meal Deal has been created.

- a) In the CRM **Navigation Panel** select **Product Management** followed by **Bookable Product**.
- 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) Complete the following details:

#### General:

- **Name.** Enter a name for the product. The name will be visible to operator and should therefore reflect the nature of the product. For example a pint of Carling with food Meal Deal.
- **Translated Name.** Used for translated implementations.
- **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.
- **Sequence.** If applicable, enter a sequence number for the product. The sequence number is used to determine the order in which products are displayed in the POS and Web channels.
- **Beneficiary Requirement.** Use the drop-down list to select if a customer's name is required when the product is purchased. For stock products this option should be set to **Not Required**.
- **Report Category.** Can be used for reporting purposes to categorise the products sold through Green 4 F&B.
- **Code.** Can be used to enter the barcode for products sold through the Green 4 F&B POS.
- **Is Anonymous.** Select **Yes** if the purchaser is not required to provide a name when buying the product. The channel must be set up to anonymous purchases also.
- **Available Offline.** Select **Yes** if the bookable product is to be available for purchase through the offline POS. This option cannot be used for products that require capacity to be monitored.
- **Meal Deal.** Select **Yes**, to show that this is a Meal Deal product. This is then used for reporting purposes.

#### Referring Entities:

- **Category.** Use the Look Up Records dialog to select the product category. The category is used to group products, for example Meal Deals, alcoholic drinks, soft drinks etc.
- **Product Calendar.** Select the default product calendar.

**Membership:**

- **Is Membership.** Select **No**.

**Time Settings:**

- **Available Date From.** Enter the date the product goes on sale.
- **Available Date To.** Enter the date the product is removed from sale.
- **Available Time From.** Enter the time the product goes on sale.
- **Available Time To.** Enter the time the product is removed from sale.

**Delivery Options:**

- **Print At Home.** Select **No** for F&B products.
- **Requires Delivery.** Select **No** for F&B products.



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

---

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

The screenshot shows the 'Bookable Product' interface. The 'Variants & Pricing' section is expanded, and a dropdown menu is highlighted with a red box. The dropdown menu is currently empty, showing only a downward arrow. The interface includes a ribbon with 'File', 'Bookable Product', 'Add', and 'Customize' tabs. The 'Bookable Product' tab is active, showing options like 'Save', 'Save & Close', 'Deactivate', 'Delete', 'Share', 'Copy a Link', 'E-mail a Link', 'Run Workflow', 'Start Dialog', and 'Run Report'. The 'Variants & Pricing' section includes a 'Not for Sale' checkbox, a 'Mandatory' checkbox, and a 'Variant' dropdown menu.

- To enter price information for the Meal Deal, select the relevant price list from the drop down at the top of the Variants & Pricing section (highlighted below). Please note that this must be the same Variant Price List that was selected in the Channel Price List.

The screenshot shows the 'Bookable Product' interface for 'A pint of Carling with food Meal Deal'. The 'Variants & Pricing' section is expanded, and a dropdown menu is highlighted with a red box. The dropdown menu is currently set to 'default'. The interface includes a ribbon with 'File', 'Bookable Product', 'Add', and 'Customize' tabs. The 'Bookable Product' tab is active, showing options like 'Save', 'Save & Close', 'Deactivate', 'Delete', 'Share', 'Copy a Link', 'E-mail a Link', 'Run Workflow', 'Start Dialog', and 'Run Report'. The 'Variants & Pricing' section includes a 'Not for Sale' checkbox, a 'Mandatory' checkbox, and a 'Variant' dropdown menu. Below the dropdown menu, there is a table with columns for 'Code', 'Not for Sale', 'Mandatory Variant', 'Peak Price', and 'Off Peak Price'. The table contains one row for 'A pint of Carling with food Meal Deal (Deal)' with a 'Peak Price' of 5.00 and an 'Off Peak Price' of 5.00.

- Enter the pricing (peak and off peak) information for each of the variants that are to be included on the price list. The same price should be entered in both the Peak and off Peak fields.
- j) Once the pricing details are complete select **Save & Close** on the ribbon to save the product

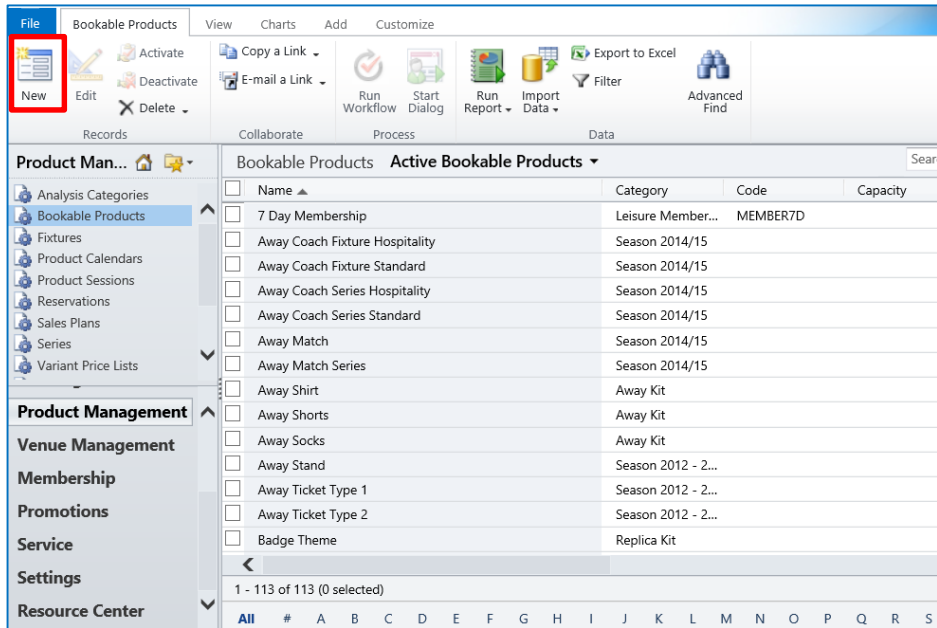


## STEP 5. CREATE BOOKABLE PRODUCTS THAT ARE TO BE PART OF THE MEAL DEAL

Next, the products that are to be part of the Meal Deal must be created. For example a bookable product must be created for the hot dog or pie etc. that are to be part of the pint of Carling with food Meal Deal in this example.

To create the product that are to be part of the Meal Deal, complete the following:

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



- Select **New** on the ribbon (highlighted above).
- A blank Bookable Product form will be displayed:

**Bookable Product New**

**General**

Name \*

Translated Name

Description

Cross Sell Product Description

Type:  Sequence:

Availability:

Beneficiary Requirement:

Capacity:

Report Category:

Code:

Is Course: ☐ No ☐ Yes

Ask Booking Questions: ☒ No ☐ Yes

Is Single Booking: ☒ No ☐ Yes

Status: **Active**

e) Complete the following details:

**General:**

- **Name.** Enter a name for the product. The name will be visible to operator and should therefore reflect the nature of the product. For example, burger or hot dog.
- **Translated Name.** Used for translated implementations.
- **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.
- **Sequence.** Enter a sequence number for the product. The sequence number is used to determine the order in which products are displayed in the POS and Web channels.
- **Beneficiary Requirement.** Use the drop-down list to select if a customer's name is required when the product is purchased. For stock products this option should be set to **Not Required**.
- **Report Category.** Can be used for reporting purposes to categorise the products sold through Green 4 F&B.
- **Code.** Can be used to enter the barcode for products sold through the Green 4 F&B POS.
- **Is Anonymous.** Select **Yes** if the purchaser is not required to provide a name when buying the product. The channel must be set up to anonymous purchases also.
- **Available Offline.** Select **Yes** if the bookable product is to be available for purchase through the offline POS. This option cannot be used for products that require capacity to be monitored.

**Referring Entities:**

- **Category.** Use the Look Up Records dialog to select the product category. The category is used to group products, for example Meal Deals, alcoholic drinks, soft drinks etc.
- **Product Calendar.** Select the default product calendar.

**Membership:**

- **Is Membership.** Select **No**.

**Delivery Options:**

- **Print At Home.** Select **No** for F&B products.
- **Requires Delivery.** Select **No** for F&B products.



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

---

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

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

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

- The channels that have been set up during the configuration on your system will be listed. Select the checkbox alongside each channel through which the product will be sold, for example Kiosk.
- Select **Save** on the ribbon.

l) Next, it is necessary to identify the *Product Variants and Prices*:

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

- 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).

- The pricing value entered here should be the price **£0.00** as the product is going to be part of a Meal Deal that already has a price associated to it.
- Additionally ensure that the **Not For Sale** flag in the Variant and Pricing section is ticked.

k) Once the pricing details are complete select **Save & Close** on the ribbon to save the product, repeat this step until all products that are to be part of the Meal Deal have been created.

## STEP 6. CREATE A BOOKABLE PRODUCT TO LINK TO THE BOOKABLE PRODUCT MODIFIER

Another Bookable product must be created in the exact same way as in [Step 5](#) but this time it will represent all of the products together that can be added to the Meal Deal, this will then be entered in the Bookable Product Modifier. In this example a bookable product called Carling Deal was created to represent the deal of that of a pint of Carling and Food.

Like in [Step 5](#) this bookable product must have:

- **Channels selected.** To represent what channel the product is to be available on.
- **Variants Selected.** Use the Variant type of **Deal** here.
- **Prices entered.** The price entered here should be **£0.00** and the flag **Not for Sale** must be ticked.

The screenshot shows the 'Bookable Product' modifier interface for a product named 'Carling Deal'. The interface is divided into several sections:

- File Menu:** Includes options like Save, Save & Close, Deactivate, Copy a Link, E-mail a Link, Run Workflow, Start Dialog, and Run Report.
- Information Panel:**
  - General:** Contains tabs for General, Channels, Variants & Pricing, Bowling, Notes, and Conflicts Tab.
  - Related:** Contains a list of related items under the 'Common' category, including Activities, Closed Activities, Audit History, Additional Products, Product Channels, Product Sessions, Product Variants, Resource Types, Promotions, and Stock Transactions.
- Main Content Area:**
  - Channels:** A section with checkboxes for 'All', 'fb', 'Kiosk', 'POS', 'Tables', and 'web'. The 'fb' and 'POS' checkboxes are selected.
  - Variants & Pricing:** A section with a dropdown menu for 'Variants' (currently showing '...') and a table for 'Pricing'.
 

	Code	Not for Sale	Mandatory Variant
Carling Deal (Deal)		<input checked="" type="checkbox"/>	<input type="checkbox"/>

## STEP 7. CREATE BOOKABLE PRODUCT MODIFIER

A Bookable Product Modifier must be created to link the Meal Deal options, for example a burger or hot dog to the Meal Deal itself.

To do this, complete the following:

- In the navigation bar select **Product Management** before selecting **Bookable Products**, open up the bookable product that is representing the Meal Deal itself. In this example it would be a pint of Carling with Food Meal Deal Bookable Product.
- With the bookable product form open select **Bookable Product Modifiers** in the navigation bar

- Select **Add Existing Bookable Product Modifier** in the ribbon

- A look up records dialogue will be displayed, select **New**.
- This will open up a new Bookable Product Modifier form, complete the following:

- **Name.** Enter a name of the bookable product modifier. In this example Carling Pint with food, has been used.
- **Is required.** Select **No**.
- **Type.** Select **Options** from the drop down menu.
- **Product.** Use the Look up to find the bookable product that was created in [Step 6](#). In this example that being, Carling Deal.
- **Default Value.** Leave this field blank.
- **Modifier option.** Leave this field blank.
- **Allow custom option.** Select **No**.
- **Validation expression.** Leave this field blank.
- **Owner.** This field will already be completed.

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

## STEP 8. CREATE THE OPTION VARIANTS

The Option Variants link the products that are going to be offered as part of the Meal Deal to the Meal Deal itself. In this example these being the pie and the hotdog.

- a) With the Product Modifier form still open, select **Option Variants** in the navigation bar.

The screenshot shows the 'Bookable Product Modifier' form for 'Carling Pint with food'. The left navigation pane has 'Option Variants' highlighted with a red box. The main form area shows the 'General' tab with fields for Name, Is required, Type, product, Default Value, Modifier options, Allow custom option, and Validation expression.

- b) Select **Add Existing Product Variant** in the ribbon.

The screenshot shows the 'Bookable Product Modifier' form for 'Carling Pint with food'. The ribbon is set to 'List Tools' and 'Product Variants'. The 'Add Existing Product Variant' button is highlighted with a red box. The main form area shows the 'Option Variants' tab with a table of product variants.

Name	Variant Type	Code	Not for Sale

- c) A Look Up Records dialogue will be displayed, use the search option to find the products that are to be part of the meal deal and were previously created in [Step 5](#). In this example those being a hot dog and a pie.

- d) Select the products and choose **Add**. When all of the products have been chosen select **OK**.
- e) The Option Variants will be displayed in a list, select **General** in the Navigation area.



**Note:** It is possible to select which order the Option Variants will be displayed in the drop down menu in the POS when selecting the Meal Deal. To do this:

- a) With the Option Variants view opened in the Bookable Product Modifier form select the Option Variant. For example Hotdog.



- b) This will open up the Product Variant form. Within the form find the **Sequence** field. Enter the order number that this product will be displayed in. For example enter the number 2 if the Option Variant will be the second option to show in the drop list of the POS.

The screenshot shows the 'Product Variant' form for 'Hotdog (Each)'. The 'General' tab is active. The 'Sequence' field is highlighted with a red box and contains the value '2'. Other fields include Name, Description, Short Group, Short Description, Not for Sale (radio buttons), Bookable Product (Hotdog), Mandatory Variant (radio buttons), People, Variant Type (Each), and Zonal.

- c) Select **Save and Close** on the ribbon and repeat this for each of the Option Variants to place them in the appropriate order.

The screenshot shows the 'Bookable Product Modifier' form for 'Carling pint with food'. The 'Option Variants' table is visible, showing three variants: Hotdog (Each), Steak pie (Each), and an unnamed variant. The 'General' tab is selected in the left sidebar.

Name	Variant Type	Code	Not for Sale
Hotdog (Each)	Each		No
Steak pie (Each)	Each		No

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

## OVERVIEW

Task	Completed?	Comments
Created Variant Types		Create the type of Bookable Product you can purchase. For example a type of Meal Deal Bookable Product may have a variant types of Deal
Created Variant Price Lists		Prices are defined using Variant Price Lists in the Bookable Product form and is linked to the Channel Price List
Created a Channel Price List		<p>The channel price list should be linked to the default sales plan</p> <p>The channel price list should link the channels to the variant price list on which prices have been entered.</p> <p>Ensure the channel price list dates are valid.</p> <p>A channel price list will need to be created for each Variant Price List – Channel combination created.</p>
Created the overall Meal Deal Bookable Product. i.e. A pint of Carling with food Meal Deal		<p>Ensure the Bookable Product Type is set as Stock</p> <p>Ensure the Meal Deal flag is set to Yes</p> <p>Ensure a category for example, Meal Deal, has been entered</p> <p>Ensure the relevant channel check boxes are ticked</p> <p>Ensure the variant (Deal) is listed</p> <p>Enter the price of the meal deal using an active Variant Price List that has been linked to a Channel Price List.</p>
Created the Bookable Products that are to be part of the meal deal. i.e. The food in the meal deal- Hot dog and pie		<p>Ensure the Bookable Product Type is set as Stock</p> <p>Ensure a category, for example Meal Deal, has been entered</p> <p>Ensure the relevant channel check boxes are ticked</p> <p>Ensure the Variant (Each) is listed</p> <p>Ensure the price of the product entered is £0.00 and that an active Variant Price List has been linked to a Channel Price List.</p> <p>Tick the Not for Sale flag in the Variant and Pricing section</p>
Created the Bookable Product to link to the Bookable Product Modifier. i.e. Carling Deal		<p>Ensure the Bookable Product Type is set as Stock</p> <p>Ensure a category, for example Meal Deal, has been entered.</p> <p>Ensure the relevant channel check boxes are ticked</p> <p>Ensure the Variant (Deal) is listed</p>

		<p>Ensure the price of the product entered is £0.00 and that an active Variant Price List has been linked to a Channel Price List.</p> <p>Tick the Not for Sale flag in the Variant and Pricing section</p>
Created the Bookable Product Modifier to link the various Meal Deal options, for example a pie or hot dog to the Meal Deal itself.		<p>The Is required field must be set to No</p> <p>The Type field must be selected as Options</p> <p>The Product field should display the Bookable Product that was previously created to link to the Bookable Product Modifier.</p> <p>The Allow Custom option field must be set to No</p>
Created the Option Variants that link the products that are going to be offered as part of the Meal Deal to the Meal Deal itself		<p>Add the products that are going to be offered as part of the Meal Deal, for example a pie, burger etc.</p>

## THE MEAL DEAL IN THE POS

Upon completion of setting up this type of Meal Deal within CRM (A Pint of Carling with food meal Deal in this example) it will be displayed in the POS. Please note that the Meal Deals in this example are coloured in blue due to the category type of Meal Deal that was selected being made this colour.

To view and purchase this type of Meal Deal complete the following:

- Open up the POS, the food and beverage products that you are selling will be displayed.

**stadiumtest**  
D1, SH1
 

Cash Skim
 Till Report
 Open Till
 LOCK
 Logout
 Home
 Back

Current Booking
 Find Booking
 Find Seat
 Tabs
 Customer
 Coupon
 Cashless Accounts
 Access Gate

Carling (Each) 3.00	Carlsberg (Each) 3.00	Guinness (Each) 4.00	Ginger Beer (Each) 1.51	Guava juice (Each) 2.00	Pepsi (Each) 1.26	Randoms (Each) 2.00
Polos (Each) 2.00	Chocolate Bar (Each) 2.00	Kit Kat (Each) 0.50	Snickers (Each) 1.00	Twix (Each) 0.50	Chicken Pie (Each) 2.00	Hotdog (Each) 1.00
Pizza Slice (Each) 4.00	Steak Pie (Each) 2.00	Vegetable Pie (Each) 2.00	A Burger and a Pint of Fosters Meal Deal (Deal) 5.00	A pint of Carling with food Meal Deal (Deal) 5.00	Pie, Pint and Chocolate Meal Deal (Deal) 5.00	

**Reference No.:**

Name	Unit	Qty	Line

Discount And Promos

Beneficiaries
 Speed Checkout
 Add Comment
 Print Wizard
 Promotion
 Close
 Print Tickets
 Add Payment

- b) Select the Meal Deal that you have previously created, in this example that being, a pint of Carling with food Meal Deal, as is highlighted below.

Carling (Each) 3.00	Carlsberg (Each) 3.00	Guinness (Each) 4.00	Ginger Beer (Each) 1.51	Guava juice (Each) 2.00	Pepsi (Each) 1.26	Randoms (Each) 2.00
Polos (Each) 2.00	Chocolate Bar (Each) 2.00	Kit Kat (Each) 0.50	Snickers (Each) 1.00	Twix (Each) 0.50	Chicken Pie (Each) 2.00	Hotdog (Each) 1.00
Pizza Slice (Each) 4.00	Steak Pie (Each) 2.00	Vegetable Pie (Each) 2.00	A Burger and a Pint of Fosters Meal Deal (Deal) 5.00	A pint of Carling with food Meal Deal (Deal) 5.00	Pie, Pint and Chocolate Meal Deal (Deal) 5.00	

- c) A Product Options dialogue will be displayed. Select the drop down to display the Option variants that were created and which can then be chosen to be part of the Meal Deal. In this example the Option Variants are hotdog and steak pie.

Product Options

A pint of Carling with food Meal Deal (Deal)

Carling pint with food:

Hotdog (Each)

Steak pie (Each)

Hotdog (Each)

Cancel

- d) Upon selecting the option. Choose **Add** to add the chosen Meal Deal to the shopping cart.

Product Options

A pint of Carling with food Meal Deal (Deal)

Carling pint with food:

Hotdog (Each)

Cancel

Total: £5.00

Add

- e) The Meal Deal will appear in the shopping cart area as is displayed below. Select **Add Payment** to complete the purchase.

Customer

Select Customer

**Reference No.:**

Name	Unit	Qty	Line		
A pint of Carling with food Meal Deal (Deal)	£5.00	1	£5.00	X	Reduce
Carling pint with food: Hotdog (Each)					

Discount And Promos

Beneficiaries

Total Price	£5.00	Add Comment	Print Wizard	Promotion
Total to pay	£5.00			

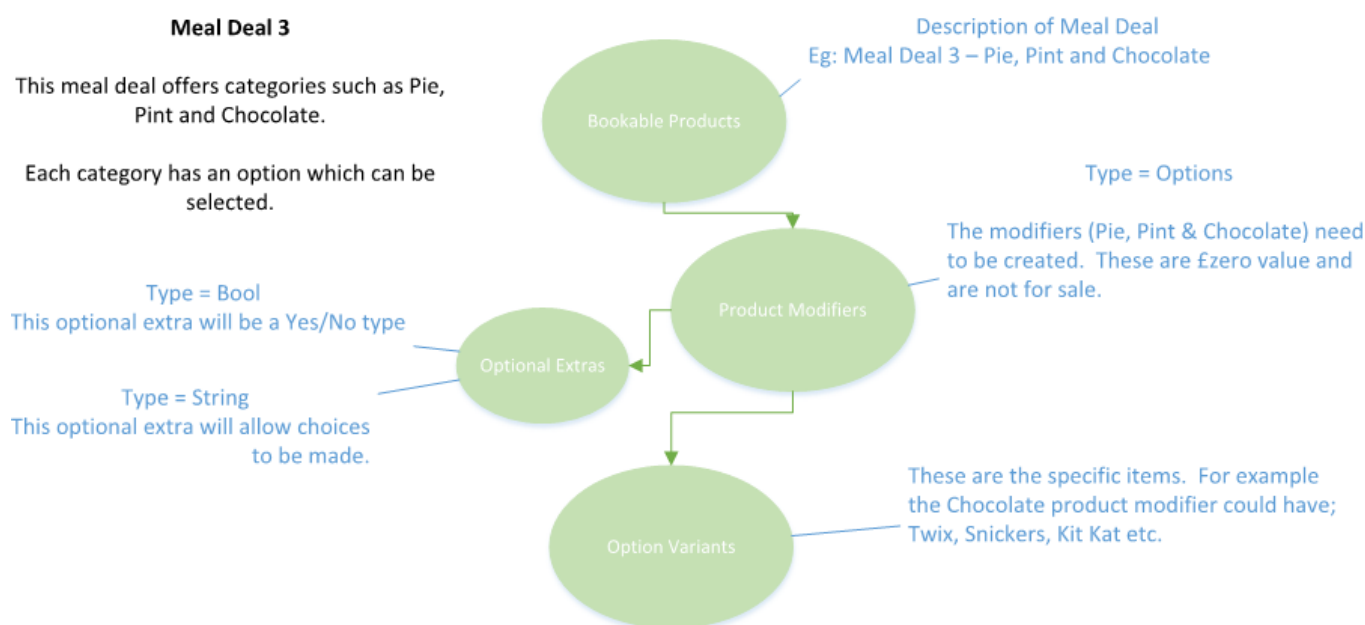
Close

Print Tickets

Add Payment

### 3. CREATING A MEAL DEAL THAT CONSISTS OF PRODUCTS AND SPECIFIC VARIANTS OF ALL PRODUCTS.

This type of Meal Deal allows the deal to consist of a combination of products that can be chosen by the operator but also specific types of these products. For example there may be a Meal Deal for a pint, pie and a chocolate bar however with this type of Meal Deal set up, the end customer will be able to choose what each component consists of. For example, a pie could be chicken, steak or vegetable; a pint could be a Fosters, Carlsberg or Guinness and a chocolate bar could be a Kit Kat, Twix or Snickers. The diagram below shows how this type of Meal Deal can be created.



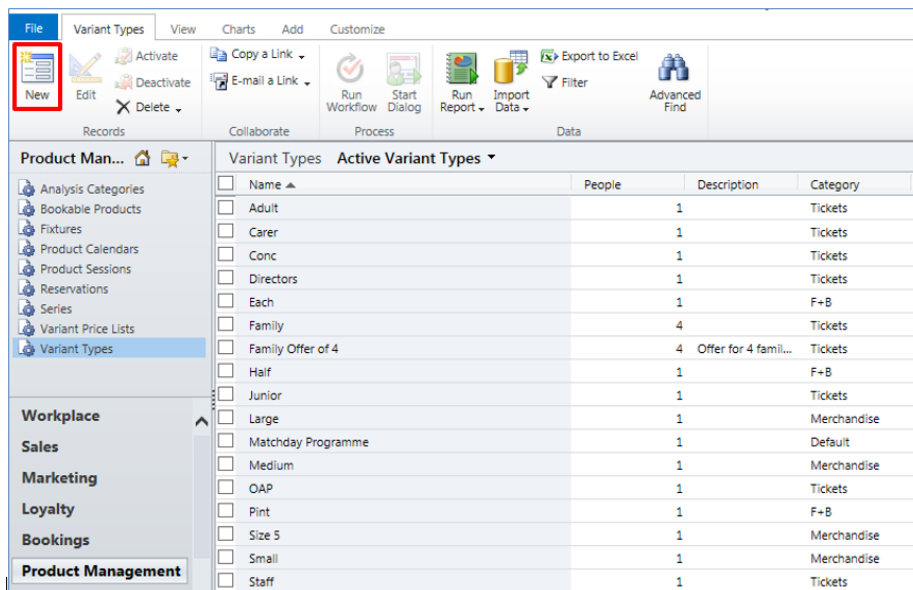
To create this type of Meal Deal the following steps must be followed:

#### STEP 1. CREATE THE VARIANT TYPE (DEAL)

Variant Types describe the type of Bookable Product that you can purchase. For example a type of drink Bookable Product may have a variant types of a pint and half pint or a type of food may have a variant type of each whilst a Meal Deal will need a Variant Type of **Deal**.

To create the Variant Type for the Meal Deal complete the following:

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



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

The screenshot shows the 'New Variant Type' form. The 'General' tab is selected. The form contains the following fields:

- Name \***: Text input field.
- Translated name**: Text input field.
- Description**: Text input field.
- Skidata Class Code**: Text input field.
- Category**: Dropdown menu.
- Voucher Value**: Text input field with a currency symbol (£).
- Tariff Code**: Text input field.
- Sequence**: Text input field.
- Conversion Factor**: Text input field.

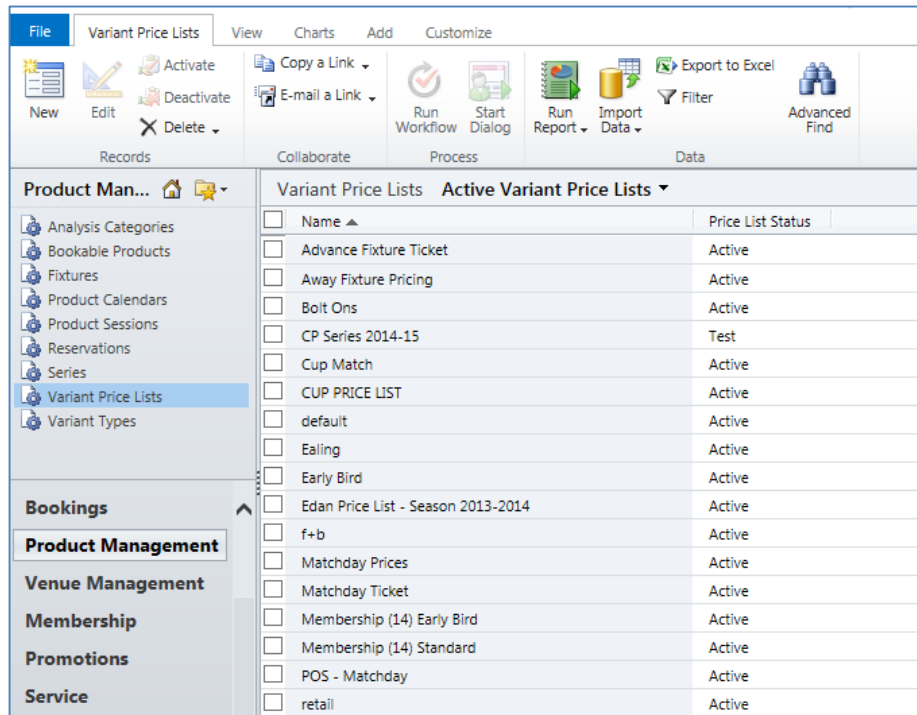
- **Name.** Enter a name for the variant type, for example, Deal.
- **People.** Enter the number of people included in the variant type. For F&B Meal Deals this is usually 1.
- **Translated Name.** This field is used when the system is being translated into another language. Multiple translations can be added in the one field.
- **Description.** Enter a description of the variant type.
- **Skidata Class Code.** Used for access control.
- **Category.** Used to group the variant types into categories for reporting purposes and for use in the price list editor. For example soft drinks, beers, spirits, chocolate bars, Meal Deals etc.
- **Voucher Value.** Used for voucher variants.
- **Tariff Code.** This is not used for F&B.
- **Sequence.** Used to display a certain sequence of Variant Types.
- **Conversion Factor.** Used to convert the cost of a large batch of products into the cost of individual products within this batch. For example, if a barrel of draft beer is purchased the conversion factor will be used to convert the cost of the barrel into a single pint of beer.

g) Select **Save and Close** on the ribbon to save the changes made.

## STEP 2. CREATE THE VARIANT PRICE LIST

Prices are defined using Variant Price Lists, which are subsequently linked to the channel using the channel price list entity.

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



- c) If a suitable price list exists, double-click over the appropriate row in the list. Alternatively select **New** on the ribbon to create a new variant price list.
- d) The Variant Price List form will be displayed. If creating a new variant price list, enter the following details:
  - **Name.** Enter a name for the price list, for example Meal Deals.
  - **Price List Status.** Select the price list status from the drop-down list. Ensure that the price list status is set to **Active**.
- f) Select **Save and Close** on the ribbon.



### STEP 3. 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 for the Meal Deal:

- a) On the CRM navigation panel, select **Sales Plan** on the **Product Management** tab.
- b) A list of sales plans matching the view criteria will be displayed.
- c) Open the **Default Sales Plan** (the default sales plan should be linked to the company details record in CRM).
- d) Select **Channel Price List** in the form navigation area.
- e) A list of channel price lists that have been previously linked to the variant price list will be shown. Select **Add New Channel Price List** on the ribbon.
- f) A blank channel price list form will be displayed. Complete the following details:
  - **Name.** The name of the channel price list.
  - **Channel.** Select the Look Up icon alongside the field. The Look Up Records dialog will be displayed. Select the appropriate channel before clicking **OK** to continue.
  - **On Sale Date.** Enter the date and time when the price list will be available for use by the channel. An On Sale Date must be entered when creating a price list for stock products.
  - **Marketing List.** If applicable, select the marketing list the channel price list relates to. If a marketing list is applied to a channel price list, only contacts that have been added to the marketing list will use the channel price list. This option can be used to give beneficial prices to people that have previously bought a particular product, for example a membership product. Preferential pricing can either be driven by the use of a different variant price list, or by entering a discount percent.
  - **Discount Percent.** If 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.

#### STEP 4. CREATE THE MEAL DEALS BOOKABLE PRODUCT

The Bookable Product entity is used to represent products that are sold, in this instance the Meal Deal itself. For each Meal Deal that you are selling through the system you must create a Bookable Product. In the example being used a Bookable Product of a Pie, Pint and Chocolate Meal Deal has been created.

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

Name	Category	Code	Capacity
<input type="checkbox"/> 7 Day Membership	Leisure Member...	MEMBER7D	
<input type="checkbox"/> Away Coach Fixture Hospitality	Season 2014/15		
<input type="checkbox"/> Away Coach Fixture Standard	Season 2014/15		
<input type="checkbox"/> Away Coach Series Hospitality	Season 2014/15		
<input type="checkbox"/> Away Coach Series Standard	Season 2014/15		
<input type="checkbox"/> Away Match	Season 2014/15		
<input type="checkbox"/> Away Match Series	Season 2014/15		
<input type="checkbox"/> Away Shirt	Away Kit		
<input type="checkbox"/> Away Shorts	Away Kit		
<input type="checkbox"/> Away Socks	Away Kit		
<input type="checkbox"/> Away Stand	Season 2012 - 2...		
<input type="checkbox"/> Away Ticket Type 1	Season 2012 - 2...		
<input type="checkbox"/> Away Ticket Type 2	Season 2012 - 2...		
<input type="checkbox"/> Badge Theme	Replica Kit		

- Select **New** on the ribbon (highlighted above).
- A blank Bookable Product form will be displayed:

e) Complete the following details:

#### General:

- **Name.** Enter a name for the product. The name will be visible to operator and should therefore reflect the nature of the product. For example A Pie, Pint and Chocolate Meal Deal.
- **Translated Name.** Used for translated implementations.
- **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.
- **Sequence.** If applicable, enter a sequence number for the product. The sequence number is used to determine the order in which products are displayed in the POS and Web channels.
- **Beneficiary Requirement.** Use the drop-down list to select if a customer's name is required when the product is purchased. For stock products this option should be set to **Not Required**.
- **Report Category.** Can be used for reporting purposes to categorise the products sold through Green 4 F&B.
- **Code.** Can be used to enter the barcode for products sold through the Green 4 F&B POS.
- **Is Anonymous.** Select **Yes** if the purchaser is not required to provide a name when buying the product. The channel must be set up to anonymous purchases also.
- **Available Offline.** Select **Yes** if the bookable product is to be available for purchase through the offline POS. This option cannot be used for products that require capacity to be monitored.
- **Meal Deal.** Select **Yes**, to show that this is a Meal Deal product. This is then used for reporting purposes.

#### Referring Entities:

- **Category.** Use the Look Up Records dialog to select the product category. The category is used to group products, for example Meal Deals, alcoholic drinks, soft drinks etc.
- **Product Calendar.** Select the default product calendar.

**Membership:**

- **Is Membership.** Select **No**.

**Time Settings:**

- **Available Date From.** Enter the date the product goes on sale.
- **Available Date To.** Enter the date the product is removed from sale.
- **Available Time From.** Enter the time the product goes on sale.
- **Available Time To.** Enter the time the product is removed from sale.

**Delivery Options:**

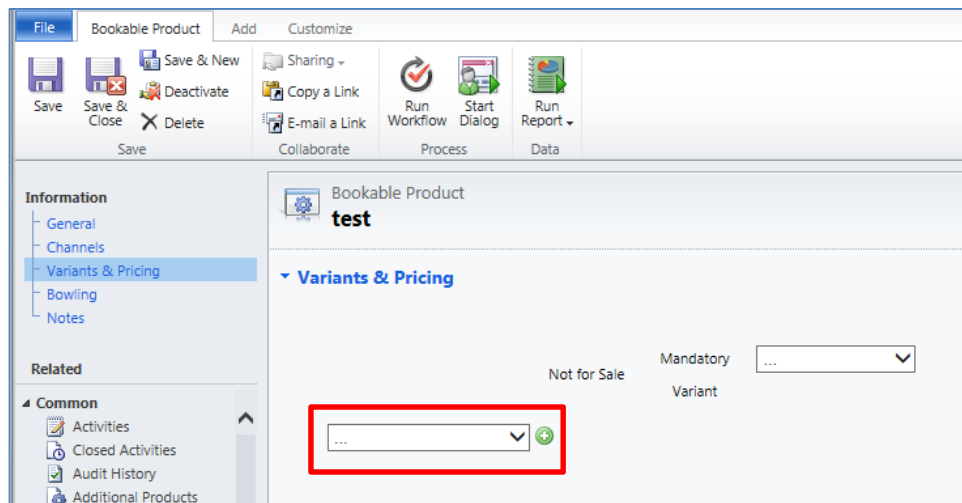
- **Print At Home.** Select **No** for F&B products.
- **Requires Delivery.** Select **No** for F&B products.



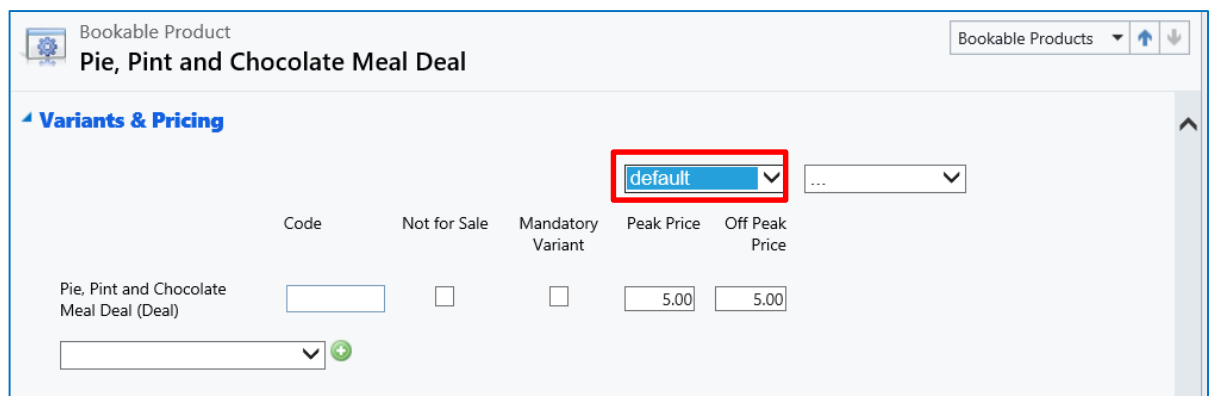
**Note.** All other fields in the Bookable Product form that have not been described above do not need to be completed/changed.

---

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



- To enter price information for the Meal Deal, select the relevant price list from the drop down at the top of the Variants & Pricing section (highlighted below). Please note that this must be the same Variant Price List that was selected in the Channel Price List.



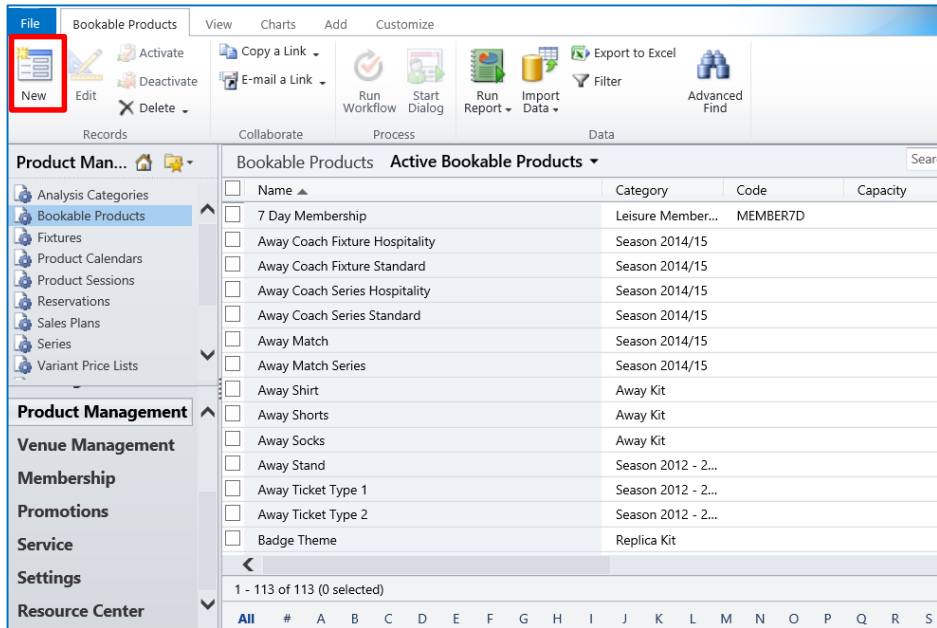
- Enter the pricing (peak and off peak) information for each of the variants that are to be included on the price list. The same price should be entered in both the Peak and off Peak fields.
- l) Once the pricing details are complete select **Save & Close** on the ribbon to save the product

## STEP 5. CREATE BOOKABLE PRODUCTS THAT ARE TO BE PART OF THE MEAL DEAL

Next, the products that are to be part of the Meal Deal must be created. For example a bookable product must be created for the pie, pint and chocolate that are to be part of the Pie, Pint and Chocolate Meal Deal in this example.

To create the product that are to be part of the Meal Deal, complete the following:

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



- Select **New** on the ribbon (highlighted above).
- A blank Bookable Product form will be displayed:

**Bookable Product New**

**General**

Name \*

Translated Name

Description

Cross Sell Product Description

Type  Sequence

Availability

Beneficiary Requirement

Capacity

Report Category

Code

Is Course ☐ No ☐ Yes

Ask Booking Questions ☒ No ☐ Yes

Is Single Booking ☒ No ☐ Yes

Status **Active**

e) Complete the following details:

**General:**

- **Name.** Enter a name for the product. The name will be visible to operator and should therefore reflect the nature of the product. For example, Pie, Pint or Chocolate.
- **Translated Name.** Used for translated implementations.
- **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.
- **Sequence.** If applicable, enter a sequence number for the product. The sequence number is used to determine the order in which products are displayed in the POS and Web channels.
- **Beneficiary Requirement.** Use the drop-down list to select if a customer's name is required when the product is purchased. For stock products this option should be set to **Not Required**.
- **Report Category.** Can be used for reporting purposes to categorise the products sold through Green 4 F&B.
- **Code.** Can be used to enter the barcode for products sold through the Green 4 F&B POS.
- **Is Anonymous.** Select **Yes** if the purchaser is not required to provide a name when buying the product. The channel must be set up to anonymous purchases also.
- **Available Offline.** Select **Yes** if the bookable product is to be available for purchase through the offline POS. This option cannot be used for products that require capacity to be monitored.

**Referring Entities:**

- **Category.** Use the Look Up Records dialog to select the product category. The category is used to group products, for example Meal Deals, alcoholic drinks, soft drinks etc.
- **Product Calendar.** Select the default product calendar.

**Membership:**

- **Is Membership.** Select **No**.

**Delivery Options:**

- **Print At Home.** Select **No** for F&B products.
- **Requires Delivery.** Select **No** for F&B products.



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

---

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

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

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

- The channels that have been set up during the configuration on your system will be listed. Select the checkbox alongside each channel through which the product will be sold, for example Kiosk.
- Select **Save** on the ribbon.

p) Next, it is necessary to identify the *Product Variants and Prices*:

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

- 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).

- The pricing value entered here should be the price **£0.00** as the product is going to be part of a Meal Deal that already has a price associated to it.
- Additionally ensure that the **Not for Sale** flag in the Variant and Pricing section is ticked.

m) Once the pricing details are complete select **Save & Close** on the ribbon to save the product, repeat this step until all products that are to be part of the Meal Deal have been created.

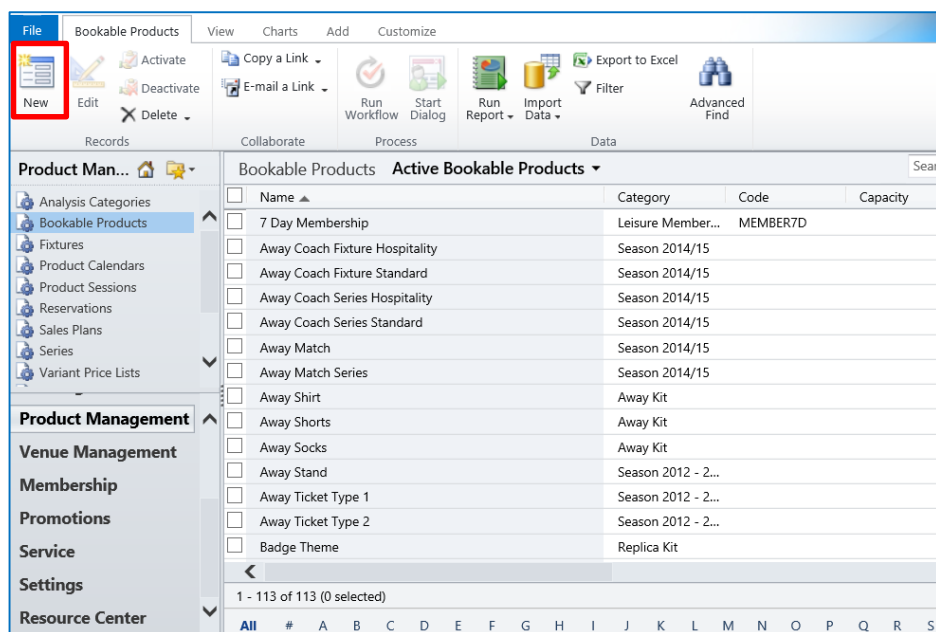


## STEP 6. CREATE THE BOOKABLE PRODUCTS TYPES

Next a Bookable Product must be created to represent each type of the product that is going to be included in the Meal Deal. For example although a Bookable Product has been made to represent the product as a whole, e.g. chocolate, pie and pint, the specific types of these also need creating. Therefore in this example the different types of chocolate bars (Twix, Snickers, and Kit Kat), Pints (Fosters, Carlsberg, Guinness) and Pies (steak, chicken, vegetable) will all need creating as separate bookable products.

If the different types of products (i.e. chicken pie, vegetable pie, steak pie) do not already exist on your system, complete the following:

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



- Select **New** on the ribbon (highlighted above).
- A blank Bookable Product form will be displayed:

e) Complete the following details:

#### General:

- **Name.** Enter a name for the product. The name will be visible to operator and should therefore reflect the nature of the product. For example, Chicken Pie.
- **Translated Name.** Used for translated implementations.
- **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.
- **Sequence.** If applicable, enter a sequence number for the product. The sequence number is used to determine the order in which products are displayed in the POS and Web channels.
- **Beneficiary Requirement.** Use the drop-down list to select if a customer's name is required when the product is purchased. For stock products this option should be set to **Not Required**.
- **Report Category.** Can be used for reporting purposes to categorise the products sold through Green 4 F&B.
- **Code.** Can be used to enter the barcode for products sold through the Green 4 F&B POS.
- **Is Anonymous.** Select **Yes** if the purchaser is not required to provide a name when buying the product. The channel must be set up to anonymous purchases also.
- **Available Offline.** Select **Yes** if the bookable product is to be available for purchase through the offline POS. This option cannot be used for products that require capacity to be monitored.

#### Referring Entities:

- **Category.** Use the Look Up Records dialog to select the product category. The category is used to group products, for example Meal Deals, alcoholic drinks, soft drinks etc.
- **Product Calendar.** Select the default product calendar.

#### Membership:

- **Is Membership.** Select **No**.

**Delivery Options:**

- **Print At Home.** Select **No** for F&B products.
- **Requires Delivery.** Select **No** for F&B products.



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

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

- If the product can also be sold separately you must enter price information for the individual price of the product on its own, select the relevant price list from the drop down at the top of the Variants & Pricing section (highlighted below).

	Code	Not for Sale	Mandatory Variant	Peak Price	Off Peak Price
Chicken Pie (Each)		<input type="checkbox"/>	<input type="checkbox"/>	2.50	2.50

- Enter the price of the product, being the same in both the Peak and Off Peak Price field.
- i) Select **Save and Close** on the ribbon. Repeat the above process for each of the product types that are to be part of the meal deal, for example a Chicken Pie, Vegetable Pie, Steak Pie etc.

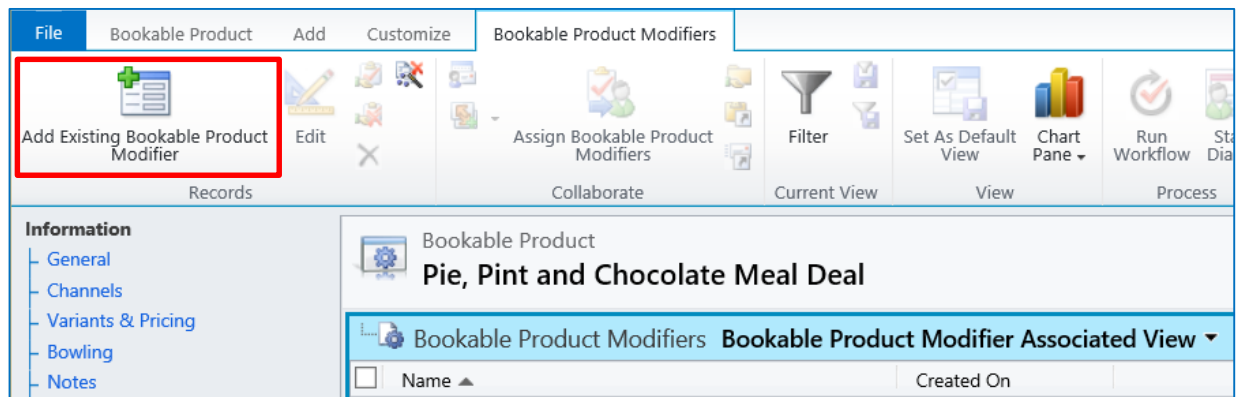
## STEP 7. CREATE BOOKABLE PRODUCT MODIFIERS

Bookable Product Modifiers must be created to link the Meal Deal options, for example pie, pint and chocolate to the Meal Deal itself.

To do this, complete the following:

- In the navigation bar select **Product Management** before selecting **Bookable Products**, open up the bookable product that is representing the Meal Deal itself. In this example it would be the Pie, Pint and Chocolate Meal Deal Bookable Product.
- With the bookable product form open select **Bookable Product Modifiers** in the navigation bar

- Select **Add Existing Bookable Product Modifier** in the ribbon



- d) A look up records dialogue will be displayed, select **New**.
- e) This will open up a new Bookable Product Modifier form, complete the following:

- **Name.** Enter a name of the bookable product modifier. In this example a pie has been used
- **Is required.** Select **No**.
- **Type.** Select **Options** from the drop down menu.
- **Product.** Use the Look up to find a bookable product that was created in [Step 5](#). In this example that being, Pie.
- **Default Value.** Leave this field blank.
- **Modifier option.** Leave this field blank.
- **Allow custom option.** Select **No**.
- **Validation expression.** Leave this field blank.
- **Owner.** This field will already be completed.

- f) Select **Save** in the ribbon.

## STEP 8. CREATE THE OPTION VARIANTS

The Option Variants link the type of products that are going to be offered as part of the Meal Deal to the Meal Deal itself. In this example these being the options of a steak pie, chicken pie or vegetable pie.

- a) With the Product Modifier form still open, select **Option Variants** in the navigation bar.

The screenshot shows the 'Bookable Product Modifier' form for a 'Pie'. The left sidebar has a 'Related' section with 'Option Variants' highlighted in red. The main form has a 'General' tab with the following fields:

- Name: Pie
- Is required: ☐ No ☒ Yes
- Type: Options
- product: Pie
- Default Value:
- Modifier options:
- Allow custom option: ☒ No ☐ Yes
- Validation:

- b) Select **Add Existing Product Variant** in the ribbon.

The screenshot shows the 'Bookable Product Modifier' form for a 'Pie' with the 'Product Variants' ribbon selected. The 'Add Existing Product Variant' button is highlighted in red. The ribbon also shows 'Mail Merge', 'Copy a Link', 'E-mail a Link', 'Filter', 'Set As Default View', and 'Chart Pane'.

- c) A Look Up Records dialogue will be displayed, use the search option to find the product types that are to be part of the Meal Deal and were previously created in [Step 6](#), these should match the same category of products in the bookable product modifier. In this example the Bookable Product Modifier is pie, the option variants that need to be found are the pie type products that were previously created, these being the vegetable, chicken and steak pie.

- d) Select the products and choose **Add**. When all of the product types have been chosen select **OK**.
- e) The Option Variants will be displayed in a list, select **General** in the Navigation area.



**Note:** It is possible to select which order the Option Variants will be displayed in the drop down menu in the POS when selecting the Meal Deal. To do this:

- a) With the Option Variants view opened in the Bookable Product Modifier form select the Option Variant. For example Chicken Pie.

- b) This will open up the Product Variant form. Within the form find the **Sequence** field. Enter the order number that this product will be displayed in. For example enter the number 2 if the Option Variant will be the second option to show in the drop list of the POS.

File Product Variant Add Customize

Save Save & Close Deactivate Copy a Link E-mail a Link Run Workflow Start Dialog Run Report

Information

- General
- Notes

Related

Common

- Activities
- Closed Activities
- Audit History
- Channel Sale Dates
- Additional Products
- Product Questions
- Promotions
- Coupon Products
- Booking product m...
- Stock Transactions

Product Variant

Chicken Pie (Each)

General

Name \* Chicken Pie (Each) Code

Description

Short Group Short Description

Not for Sale ☒ No ☐ Yes

Bookable Product Chicken Pie

Mandatory Variant ☒ No ☐ Yes

Sequence

People

Variant Type Each

- c) Select **Save and Close** on the ribbon and repeat this for each of the Option Variants to place them in the appropriate order.

File Bookable Product Modifier Add Customize Product Variants

Add Existing Product Variant Edit Activate Deactivate Bulk Delete Remove

Records Collaborate Current View View

Information

- General
- Notes

Related

Common

- Activities
- Closed Activities
- Connections
- Audit History
- Booking product mod...
- Bookable Products
- Option Variants

Bookable Product Modifier

Pie

Option Variants Product Variant Associated View

<input type="checkbox"/>	Name	Variant Type	Code	Not for Sale
<input type="checkbox"/>	Balti Pie (Each)	Each		No
<input type="checkbox"/>	Chicken Pie (Each)	Each		No
<input type="checkbox"/>	Steak Pie (Each)	Each		No

- f) Select **Save and Close** on the ribbon.
- g) This will return you to the Bookable Product Modifier view in the Bookable Product form. From here repeat [Step 7](#) and [Step 8](#) for each of the modifiers and option variants that you need to create for your Meal Deal. In this example a further two Product Modifiers would have to be created, these being Pint and Chocolate whilst the option variants available on the meal deal (The specific types of pints and chocolate) would need to be added.



## OVERVIEW

Task	Completed?	Comments
Created Variant Types		Create the type of Bookable Product you can purchase. For example a type of Meal Deal Bookable Product may have a variant types of Deal
Created Variant Price Lists		Prices are defined using Variant Price Lists in the Bookable Product form and is linked to the Channel Price List
Created a Channel Price List		<p>The channel price list should be linked to the default sales plan</p> <p>The channel price list should link the channels to the variant price list on which prices have been entered.</p> <p>Ensure the channel price list dates are valid.</p> <p>A channel price list will need to be created for each Variant Price List – Channel combination created.</p>
Created the overall Meal Deal Bookable Product. i.e. A Pie, Pint and Chocolate Meal Deal		<p>Ensure the Bookable Product Type is set as Stock</p> <p>Ensure the Meal Deal Flag is set to Yes</p> <p>Ensure a category for example, Meal Deal, has been entered</p> <p>Ensure the relevant channel check boxes are ticked</p> <p>Ensure the variant (Deal) is listed</p> <p>Enter the price of the meal deal using an active Variant Price List that has been linked to a Channel Price List.</p>
Created the Bookable Products that are to be part of the meal deal. i.e. The food in the meal deal- pie, pint and chocolate		<p>Ensure the Bookable Product Type is set as Stock</p> <p>Ensure a category, for example Meal Deal, has been entered</p> <p>Ensure the relevant channel check boxes are ticked</p> <p>Ensure the Variant (Each) is listed</p> <p>Ensure the price of the product entered is £0.00 and that an active Variant Price List has been linked to a Channel Price List.</p> <p>Tick the Not for Sale flag in the Variant and Pricing section</p>
Created the Bookable Product types- A Bookable Product must be created for each type of product that is included in the meal deal. The type of pies on offer could be steak, chicken or vegetable		<p>Ensure the Bookable Product Type is set as Stock</p> <p>Ensure a category, for example Meal Deal, has been entered</p> <p>Ensure the relevant channel check boxes are ticked</p> <p>Ensure the Variant (Each) is listed</p> <p>If the product can be sold separately ensure the price of the product entered represents the price of the product</p>

		when sold on its own and that an active Variant Price List has been linked to a Channel Price List.
Created the Bookable Product Modifier to link the various Meal Deal options. For example linking the pie, pint and chocolate to the Meal Deal itself.		<p>The Is required field must be set to No</p> <p>The Type field must be selected as Options</p> <p>The Product field should display one of the Bookable Products that were created to be a part of the Meal Deal to link to the Bookable Product Modifier.</p> <p>The Allow Custom option field must be set to No</p>
Created the Option Variants that link the products types that are going to be offered as part of the Meal Deal to the Meal Deal itself. For example the option of a steak, chicken or vegetable pie.		Add the product types that are going to be offered as part of the Meal Deal, for example a steak, chicken and vegetable pie

## THE MEAL DEAL IN THE POS

Upon completion of setting up this type of Meal Deal within CRM (Pie, Pint and Chocolate Meal Deal in this example) it will be displayed in the POS. Please note that the Meal Deals in this example are coloured in blue due to the category type of Meal Deal that was selected being made this colour.

To view and purchase this type of Meal Deal complete the following:

- Open up the POS, the food and beverage products that you are selling will be displayed.

**stadiumtest**  
D1, SH1

Cash Skim
Till Report
Open Till
LOCK
Logout
Home
Back

Current Booking
Find Booking
Find Seat
Tabs
Customer
Coupon
Cashless Accounts
Access Gate

Carling (Each) 3.00	Carlsberg (Each) 3.00	Guinness (Each) 4.00	Ginger Beer (Each) 1.51	Guava juice (Each) 2.00	Pepsi (Each) 1.26	Randoms (Each) 2.00
Polos (Each) 2.00	Chocolate Bar (Each) 2.00	Kit Kat (Each) 0.50	Snickers (Each) 1.00	Twix (Each) 0.50	Chicken Pie (Each) 2.00	Hotdog (Each) 1.00
Pizza Slice (Each) 4.00	Steak Pie (Each) 2.00	Vegetable Pie (Each) 2.00	A Burger and a Pint of Fosters Meal Deal (Deal) 5.00	A pint of Carling with Food Meal Deal (Deal) 5.00	Pie, Pint and Chocolate Meal Deal (Deal) 5.00	

**Reference No.:**

Name	Unit	Qty	Line

Discount And Promos
Beneficiaries
Speed Checkout

Add Comment
Print Wizard
Promotion

Close
Print Tickets
Add Payment

- Select the Meal Deal that you have previously created, in this example that being, Pie, Pint and Chocolate Meal Deal, as is highlighted below.

Carling (Each) 3.00	Carlsberg (Each) 3.00	Guinness (Each) 4.00	Ginger Beer (Each) 1.51	Guava juice (Each) 2.00	Pepsi (Each) 1.26	Randoms (Each) 2.00
Polos (Each) 2.00	Chocolate Bar (Each) 2.00	Kit Kat (Each) 0.50	Snickers (Each) 1.00	Twix (Each) 0.50	Chicken Pie (Each) 2.00	Hotdog (Each) 1.00
Pizza Slice (Each) 4.00	Steak Pie (Each) 2.00	Vegetable Pie (Each) 2.00	A Burger and a Pint of Fosters Meal Deal (Deal) 5.00	A pint of Carling with food Meal Deal (Deal) 5.00	Pie, Pint and Chocolate Meal Deal (Deal) 5.00	

- c) Select the Meal Deal that you have previously created, in this example that being, Pie, Pint and Chocolate Meal Deal, as is highlighted below.
- d) A Product Options dialogue will be displayed, from here it will be possible to select the specific types of the products that are part of the Meal Deal from the drop downs.

**Product Options**

Pie, Pint and Chocolate Meal Deal (Deal)

Chocolate: Kit Kat (Each) ▼

Pie: Chicken Pie (Each) ▼

Pint: Carling (Each) ▼

Cancel **Total: £5.00** Add

- e) Upon selecting each drop down to display the correct Meal Deal combination, choose **Add**.
- f) The Meal Deal will appear in the shopping cart area as is displayed below. Select **Add Payment** to complete the purchase.

Customer

Select Customer

Reference No.:

Name	Unit	Qty	Line		
Pie, Pint and Chocolate Meal Deal (Deal)	£5.00	1	£5.00		
Chocolate: Kit Kat (Each), Pie: Chicken Pie (Each), Pint: Carling (Each)				X	Reduce

Discount And Promos

Beneficiaries

Total Price	£5.00	Add Comment	Print Wizard	Promotion
Total to pay	£5.00			
		Close	Print Tickets	Add Payment

## 4. SETTING UP OPTIONAL EXTRAS TO ADD TO A MEAL DEAL

Upon creating a Meal Deal in CRM it is possible to have optional extras displayed which the operator can add to the Meal Deal for an extra cost. For example a customer may have selected to have the pie, pint and chocolate Meal Deal, with this Meal Deal for an additional cost it may be possible for the operator to select another product for example a slice of pizza or packet of crisps.

To create Optional Extras for a Meal Deal complete the following:

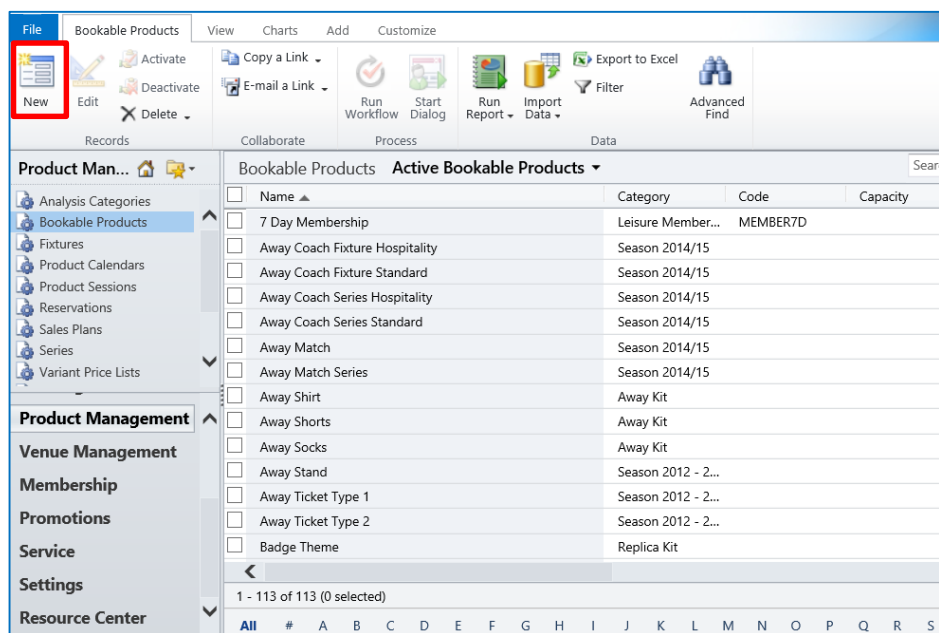
### STEP 1. CREATE THE OPTIONAL EXTRA AS A BOOKABLE PRODUCT



**Note.** This section assumes that Variant Types, a valid Variant Price Lists and Sales Plan/Channel Price List have been created for the Bookable Product.

If the Optional Extra that is to be added to the Meal Deal does not already exist as a Bookable Product, it will need to be created, for example the Pizza Slice or packet of crisps. If a Bookable Product that represent the Optional Extra does already exist, skip to [Step 2](#).

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



- Select **New** on the ribbon (highlighted above).
- A blank Bookable Product form will be displayed:

e) Complete the following details:

#### General:

- **Name.** Enter a name for the product. The name will be visible to operator and should therefore reflect the nature of the product. For example, a slice of Pizza or packet of sweets such as Randoms.
- **Translated Name.** Used for translated implementations.
- **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.
- **Sequence.** If applicable, enter a sequence number for the product. The sequence number is used to determine the order in which products are displayed in the POS and Web channels.
- **Beneficiary Requirement.** Use the drop-down list to select if a customer's name is required when the product is purchased. For stock products this option should be set to **Not Required**.
- **Report Category.** Can be used for reporting purposes to categorise the products sold through Green 4 F&B.
- **Code.** Can be used to enter the barcode for products sold through the Green 4 F&B POS.
- **Is Anonymous.** Select **Yes** if the purchaser is not required to provide a name when buying the product. The channel must be set up to anonymous purchases also.
- **Available Offline.** Select **Yes** if the bookable product is to be available for purchase through the offline POS. This option cannot be used for products that require capacity to be monitored.

#### Referring Entities:

- **Category.** Use the Look Up Records dialog to select the product category. The category is used to group products, for example Meal Deals, alcoholic drinks, soft drinks etc.
- **Product Calendar.** Select the default product calendar.

#### Membership:

- **Is Membership.** Select **No**.

**Delivery Options:**

- **Print At Home.** Select **No** for F&B products.
- **Requires Delivery.** Select **No** for F&B products.



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

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

- If the product can also be sold separately you must enter price information for the individual price of the product on its own, select the relevant price list from the drop down at the top of the Variants & Pricing section (highlighted below).

- Enter the price of the product, being the same in both the Peak and Off Peak Price field.

- Select **Save and Close** on the ribbon. Repeat the above process for each Optional Extra that is to be added to the Meal Deal.

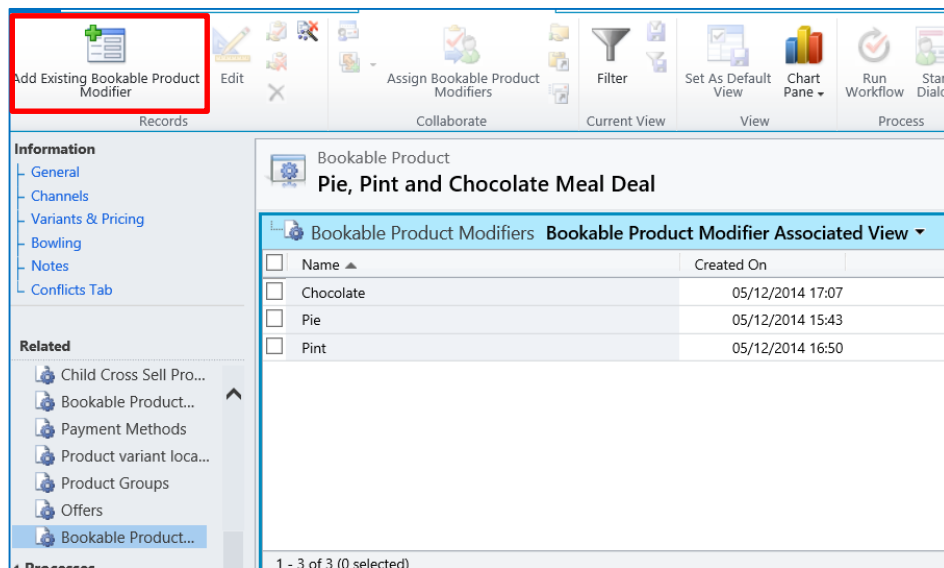
## STEP 2. LINKING THE OPTIONAL EXTRA TO THE MEAL DEAL AS A BOOKABLE PRODUCT MODIFIER

Next it is essential to link the Optional Extra Bookable Product created in the last step or that may already exist, to the Meal Deal Bookable Product itself using a Bookable Product Modifier. In the example being used this is where the Pizza Slice or crisps is linked to the Pie, Pint and Chocolate Meal Deal.

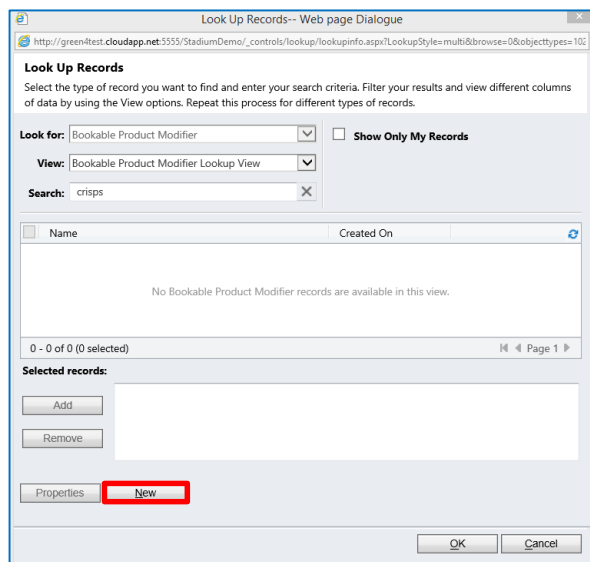
- In the navigation bar select **Product Management** before choosing **Bookable Products**.
- A list of Active Bookable Products will be displayed. Find the Meal Deal which the Optional Extras are to be added to and open it. In this example that being the Pie, Pint and Chocolate Meal Deal.
- In the opened Meal Deals Bookable Product Form, select **Bookable Product Modifiers** in the navigation bar as is highlighted below.

- Any currently active Bookable Product Modifiers will be displayed. Select **Add Existing Bookable Product Modifier** in the ribbon.





e) A Look Up Records dialogue will appear. Select **New**.



f) A new Bookable Product Modifier form will be displayed. From here it is possible to either create a Bookable Product Modifier type of String or Bool.

- **String.** Select the type **String** if the Optional Extra has a number of types you can select from. For example this could be used if the Optional Extra is a Pizza Slice, as there may be different types of Pizzas that can be selected such as BBQ, Margherita or Meat Feast.

Additionally **String** will need to be selected if there is an option to customise the Optional Extra. For example the operator will be able to enter themselves the type of Pizza that the customer is having as a blank custom option field can be displayed.

- **Bool.** Select the type **Bool** if the Optional Extra does not have differing types and is either selected by a single button to add it as an Optional Extra to the Meal Deal in the POS or is left unselected to not be added. For example this could be used if the Optional Extra is a single specific packet of crisps or sweets.

### Creating an Optional Extra Bookable Product Modifier Type- String

A Bookable Product Modifier type of String is used if the Optional Extra has a number of types you can select from. For example this could be used if the Optional Extra is a Pizza Slice, as there may be different types of Pizzas that can be selected such as BBQ, Margherita or Meat Feast.

a) Enter the following into the Bookable Product Modifier form:

- **Name.** Enter a name of the Bookable Product Modifier. In this example Pizza Slice
- **Is required.** Select **No**.
- **Type.** Select the type **String**.
- **Product.** Use the Look Up to find the Optional Extra Bookable Product. This would be the Bookable Product that was created in [Step 1](#) or if not already exists in the system. In this example that being a Pizza Slice
- **Default Value.** If applicable, enter the Value that will be displayed in the POS before any other option.
- **Modifier options.** Enter the differing types of the Optional Extra that are available, these must be entered and separated with a pipe (|) character. For example for a Pizza slice where different types of pizza can be selected, each type of pizza would need to be entered here with a pipe (|) separating each name:  
Meat Feast|BBQ|Margherita
- **Allow custom option.** Select **No**.
- **Validation expression.** This field can be left blank.
- **Owner.** This field will already be completed.

The screenshot shows the 'Bookable Product Modifier' form for 'Pizza Slice'. The form is divided into two main sections: 'General' and 'Related'. The 'General' section contains the following fields:

- Name:** Pizza Slice
- Owner:** CRM2011 Administrator
- Is required:** No (selected)
- Type:** String
- product:** Pizza Slice
- Default Value:**
- Modifier options:** BBQ|Margherita|Meat Feast
- Allow custom option:** No (selected)
- Validation expression:**

The 'Related' section on the left contains a list of related items, including 'Activities', 'Closed Activities', 'Connections', 'Audit History', 'Booking product mod...', 'Bookable Products', 'Option Variants', 'Workflows', and 'Dialog Sessions'.

- Select **Save and Close** in the ribbon.
- This will return you to the Look Up Records dialogue. Select **OK**. The Bookable Product Modifier will have been added. Repeat the instructions for any other Bookable Product Modifiers optional Extras that are of the type String.
- In the POS upon selecting a Meal Deal that has had Optional Extras added to it which were created with a Bookable Product Modifier type of String, as is described above, the POS will display the Optional Extra with a drop down menu to show the differing types of the product. This can be seen in the example below.

The screenshot shows the 'Product Options' dialog box for a 'Pie, Pint and Chocolate Meal Deal (Deal)'. The dialog box contains the following fields:

- Chocolate:** Kit Kat (Each)
- Pie:** Chicken Pie (Each)
- Pint:** Carling (Each)
- Optional extras:** Pizza Slice (+£3.00):

The 'Optional extras' section is highlighted with a red box, and a dropdown menu is open showing the following options: BBQ, Margherita, and Meat Feast.

The appropriate type of the product can then be selected before confirming all of the contents of the Meal Deal and Optional Extras. Select **Add** to add the Meal Deal and any Optional extras to the shopping cart where it can then be paid for in the normal way. The additional cost of any selected Optional Extras will be added on top of the cost of the Meal Deal.

### Creating an Optional Extra Bookable Product Modifier Type- String- Custom Option

A Bookable Product Modifier type of String can also be used if the Optional Extra can be customised for the operator to enter their own description into a field. For example the operator will be able to enter themselves the type of Pizza that the customer is having if it is not displayed in the drop down list.

- Enter the following into the Bookable Product Modifier form:
  - Name.** Enter a name of the Bookable Product Modifier. In this example Pizza Slice

- **Is required.** Select **No**.
- **Type.** Select the type **String**.
- **Product.** Use the Look Up to find the Optional Extra Bookable Product. This would be the Bookable Product that was created in [Step 1](#) or if not, already exists in the system. In this example that being a Pizza Slice.
- **Default Value.** If applicable, enter the Value that will be displayed in the POS before any other option.
- **Modifier options.** Enter the differing types of the Optional Extra that are available, these must be entered and separated with a pipe (|) character. For example for a Pizza slice where different types of pizza can be selected, each type of pizza would need to be entered here with a pipe (|) separating each name:  
Meat Feast|BBQ|Margherita.

It is also possible to leave this field uncompleted which will leave a blank field in the POS available so that an operator can enter the product into it themselves.

- **Allow custom option.** Select **Yes**.
- **Validation expression.** This field can be left blank.
- **Owner.** This field will already be completed.

- Select **Save and Close** in the ribbon.
- This will return you to the Look Up Records dialogue. Select **OK**. The Bookable Product Modifier will have been added. Repeat the instructions for any other Bookable Product Modifiers optional Extras that are of the type String and allow a Custom Option.
- In the POS upon selecting a Meal Deal that has had Optional Extras added to it which were created with a Bookable Product Modifier type of String and the allow a Custom Option flag set to Yes, as is described above, the POS will display the Optional Extra with a Custom Option field, where the operator can enter text into. This can be seen in the example below.

If necessary Text can then be added before confirming all of the contents of the Meal Deal and Optional Extras. Select **Add** to add the Meal Deal and any Optional extras to the shopping cart where it can then be paid for in the normal way. The additional cost the Optional Extra will be added on top of the cost of the Meal Deal.

## Creating an Optional Extra Bookable Product Modifier Type- Bool

A Bookable Product Modifier type of Bool is used if the Optional Extra does not have differing types and is either selected by a single button to add it as an Optional Extra to the Meal Deal in the POS or is left unselected to not be added. For example this could be used if the Optional Extra is a single specific packet of crisps or sweets.

- a) Enter the following into the Bookable Product Modifier form.
  - **Name.** Enter a name of the Bookable Product Modifier, for example Crisps
  - **Is required.** Select **No**.
  - **Type.** Select the type **Bool**.
  - **Product.** Use the Look Up to find the Optional Extra Bookable Product. This would be the Bookable Product that was created in [Step 1](#) or if not already exists in the system. In this example that being Crisps.
  - **Default Value.** This field can be left blank.
  - **Modifier options.** This field can be left blank.
  - **Allow custom option.** Select **No**.
  - **Validation expression.** This field can be left blank.
  - **Owner.** This field will already be completed.

The screenshot shows the 'Bookable Product Modifier' form for 'Crisps'. The form is divided into several sections: 'General', 'Related', 'Common', and 'Processes'. The 'General' section contains the following fields:

- Name:** Crisps
- Is required:** No (selected)
- Type:** Bool
- product:** Crisps
- Default Value:** (empty)
- Modifier options:** (empty)
- Allow custom option:** No (selected)
- Validation expression:** (empty)
- Owner:** CRM2011 Administrator

- b) Select **Save and Close** in the ribbon.
- c) This will return you to the Look Up Records dialogue. Select **OK**. The Bookable Product Modifier will have been added. Repeat the instructions for any other Bookable Product Modifiers optional Extras that are of the type Bool.
- d) In the POS upon selecting a Meal Deal that has had Optional Extras added to it which were created with a Bookable Product Modifier type of Bool, as is described above, the POS will display the Optional Extra with a button. This shown in the example below.

Product Options

Pie, Pint and Chocolate Meal Deal (Deal)

Chocolate: Kit Kat (Each)

Pie: Chicken Pie (Each)

Pint: Carling (Each)

Optional extras

Crisps (+£1.00): Selected

Cancel Total: £6.00 Add

If the Optional extra is to be added to the Meal Deal, the button which can be selected will turn orange and the wording will change from **Not Selected** to **Selected**. Select **Add** to add the Meal Deal and the Optional Extras to the shopping cart where it can then be paid for in the normal way. The additional cost of any selected Optional Extras will be added on top of the cost of the Meal Deal.

## OVERVIEW

Task	Completed?	Comments
Created Variant Types		Create the type of Bookable Product you can purchase. For example an Optional Extra may have a variant types of Each
Created Variant Price Lists		Prices are defined using Variant Price Lists in the Bookable Product form and is linked to the Channel Price List
Created a Channel Price List		<p>The channel price list should be linked to the default sales plan</p> <p>The channel price list should link the channels to the variant price list on which prices have been entered.</p> <p>Ensure the channel price list dates are valid.</p> <p>A channel price list will need to be created for each Variant Price List – Channel combination created.</p>
Created the Optional Extra as a Bookable Product		<p>Ensure the Bookable Product Type is set as Stock</p> <p>Ensure a category for example, has been entered</p> <p>Ensure the relevant channel check boxes are ticked</p> <p>Ensure the variant is listed, usually 'Each' with Optional Extras.</p> <p>Enter the price of the Optional Extra using an active Variant Price List that has been linked to a Channel Price List.</p>
Linked the Optional Extra to the Meal Deal as a Bookable Product Modifier		<p>Ensure the Meal Deal Bookable Product has a Bookable Product Modifier</p> <p>Create a Bookable Product Modifier type of either String or Bool</p>
If creating a Bookable Product Modifier type of String		<p>Ensure Is Required is set to No</p> <p>Ensure the type selected is String</p> <p>Ensure the appropriate Product has been selected</p> <p>Ensure the Modifier Options have been completed, separated with a Pipe ( )</p> <p>Ensure Allow Custom Option is set to No</p>
If creating a Bookable Product type of String- Custom Option		<p>Ensure Is Required is set to No</p> <p>Ensure the type selected is String</p> <p>Ensure the appropriate Product has been selected</p> <p>Ensure Allow Custom Option is set to Yes</p>

If creating a Bookable Product type of Bool		<p>Ensure Is Required is set to No</p> <p>Ensure the type selected is Bool</p> <p>Ensure the appropriate Product has been selected</p> <p>Ensure Allow Custom Option is set to No</p>
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## 5. MEAL DEAL REPORTS

A Meal Deal Report is available and can be generated to display what Meal Deals have been sold and the Meal Deal choices that have been selected. Any optional extras that have been added to the Meal Deal are also shown in the report.

To generate the report complete the following in CRM:

- In CRM, select Workplace in the navigation area before choosing Reports.
- Find the **Meal Deal** report and double click on it for the Report Viewer screen to open.
- Select the **Run Report** button.
- The Meal Deal report will be generated. The example below demonstrates the layout of a Meal Deal report. Please note that there are 2 pages of the report with the second page displaying more detailed information:

<div> <div>1 of 2 ?</div> <div>100%</div> <div>Find   Next</div> </div>					
<b>Meal Deal</b>					
<b>Bookings:</b> <b>Modified On: Last X Days 30</b>					
Meal Deal	Meal Deal Choices	Number	Meal Deal Price	Meal Deal Extras	Total Price
1. Burger & Fosters Meal Deal	None	1	£5.00		£5.00
	Total	1	£5.00		£5.00
2. Carling with food Meal Deal	Steak pie (Each)	1			
	Total	0			
3. Pie, Pint & Chocolate Meal Deal	Crisps: Yes	1	£8.00	£1.00	£9.00
	BBQ	1	£6.00	£3.00	£9.00
	Chicken Pie (Each)	1			
	Carling (Each)	1			
	Kit Kat (Each)	1			
	Total	2	£14.00	£4.00	£18.00
<b>Total</b>		3	£19.00	£4.00	£23.00
Report Built on: 16 Jan 2015 12:22:55					



<div> <div>2 of 3 ?</div> <div>100%</div> <div>Find   Next</div> </div>							
<b>Meal Deal</b>							
<b>Bookings:</b> <b>Modified On: Last X Days 30</b>							
Created On	Reference	Meal Deal	Variant	Meal Deal Choices	Meal Deal Price	Meal Deal Extras	Total Price
14/01/2015 14:41:33	1031750 Jenny Murphy	3. Pie, Pint & Chocolate Meal Deal	Pie, Pint and Chocolate Meal Deal (Deal)	Crisps: Yes	£8.00	£1.00	£9.00
				BBQ	£6.00	£3.00	£9.00
				Chicken Pie (Each)			
				Carling (Each)			
				Kit Kat (Each)			
				Total	£14.00	£4.00	£18.00
				Total	£14.00	£4.00	£18.00
16/01/2015 12:21:06	1031764 Customer Reference: 18 Joseph Walker	2. Carling with food Meal Deal	A pint of Carling with food Meal Deal (Deal)	Steak pie (Each)			
				Total			
				Total			
16/01/2015 12:21:58	1031765 Customer Reference: 18 Joseph Walker	1. Burger & Fosters Meal Deal	A Burger and a Pint of Fosters Meal Deal (Deal)	None	£5.00		£5.00
				Total	£5.00		£5.00
				Total	£5.00		£5.00
		Total			£5.00		£5.00