CRM Driven Solutions for Sport & Leisure

GREEN 4 TICKETING

FOOD & BEVERAGE USER GUIDE

+44 (0) 845 508 8149 | marketing@green4solutions.com | www.green4solutions.com

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ABOUT THIS DOCUMENT

This document has been prepared as a User Guide for Food and Beverage (F&B) set up.

NON-DISCLOSURE

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DOCUMENT CONTROL

Version	Date	Change	Initials
00.01	28/02/13	This is a new document	MR
V1.0	27/10/2014	Updated	JW

CONTACT

Any correspondence should be addressed to:

Product Development

Green 4 Solutions Limited
16-17 Midland Court
Central Park
Lutterworth
Leicestershire
LE17 4PN
UK

Phone: +44 (0) 845 508 8149

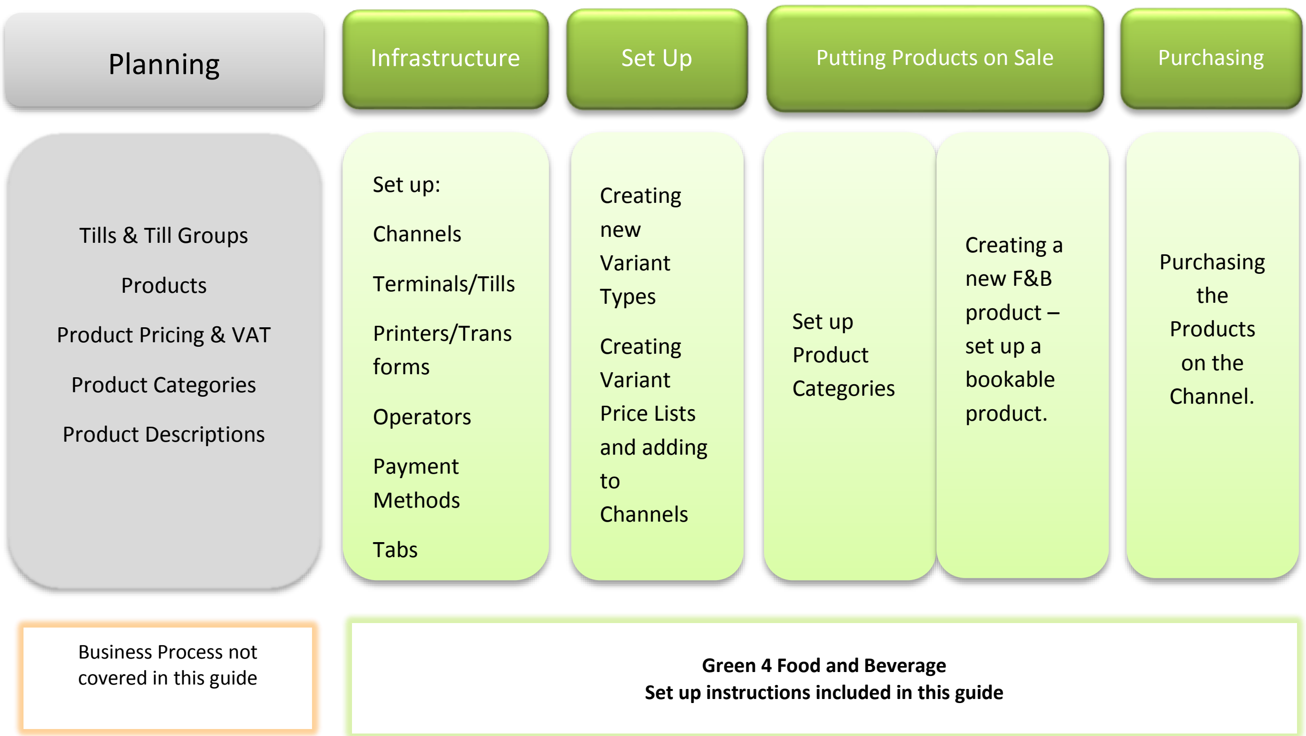
Email: support@green4solutions.com

Web: www.green4solutions.com

1. SETTING UP GREEN 4 F&B

1.1. INTRODUCTION

The Green 4 F&B solution provides the ability for a system administrator to set up Food and Beverage products and put them on sale via an appropriate channel. An overview of the set up required is shown below.



2. SETTING UP THE F&B CHANNEL

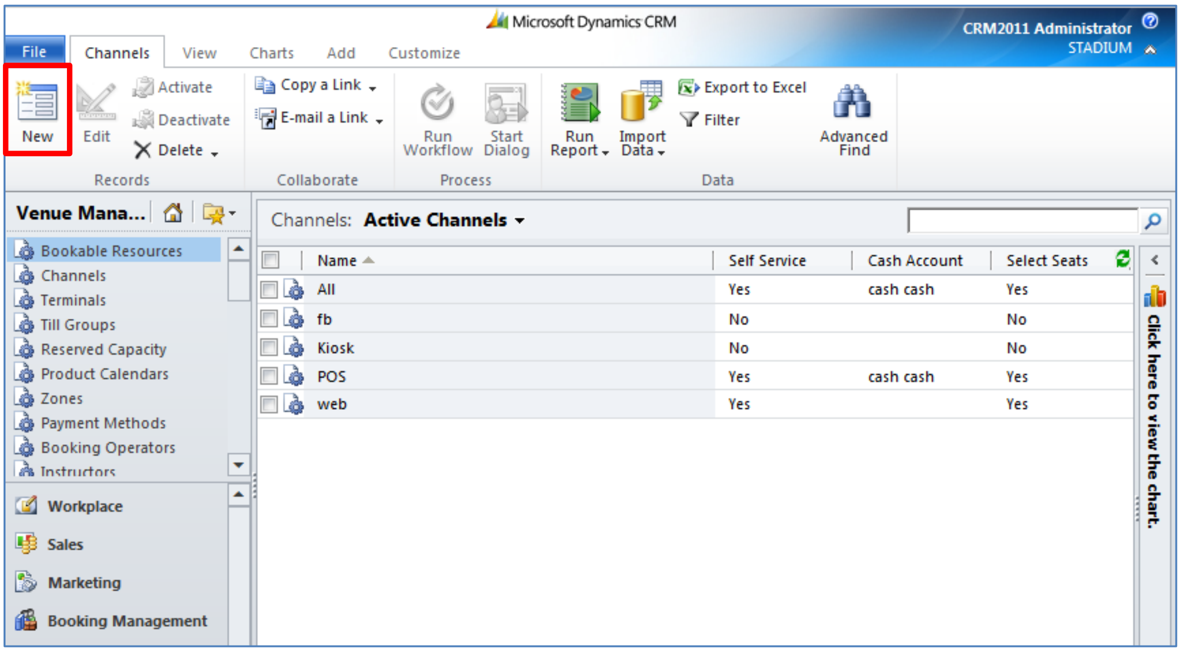
Food and beverage products can be sold through the standard POS channel alongside other products if required. However, it is often the case that F&B sales will be made through a Green 4 F&B kiosk, which is more conducive to the quick sale of products that do not require purchaser information to be collected.

2.1. SETTING UP THE KIOSK/F&B CHANNEL

To set up the Kiosk channel:

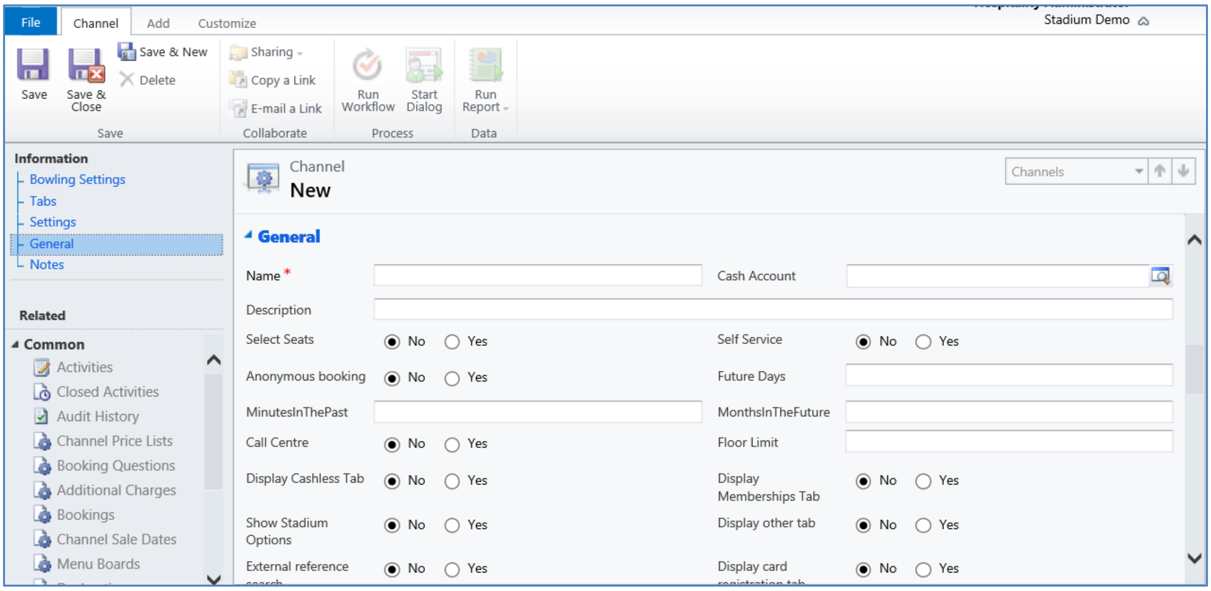
a) In the CRM **Navigation Panel** select **Venue Management** followed by **Channels**.

b) The Channels list view will be displayed:



c) Select **New** on the ribbon (highlighted in the above figure).

d) A blank Channel form will be displayed:



e) Complete the following details under the **General** section of the form:

General:

- **Name.** Enter the name of the channel. The name will be used by other users so should reflect the purpose of the channel e.g. Kiosk.

- **Cash Account.** Enter a cash account if the speed checkout option is to be available via the channel. Speed checkout allows the user to complete the check out without collecting information from the customer. This will not be required if you set up the channel and products to allow anonymous bookings.
- **Description.** Enter a description of the channel.
- **Select Seats.** Set to **No** for channels used to sell F&B only.
- **Self Service.** Select **Yes** if the channel will be used directly by the shopper (rather than through a POS Operator).
- **Anonymous Booking.** Select if anonymous bookings are allowed via the channel. If this option is selected the shopper will not have to enter a name when paying for goods that have the **Is Anonymous** setting set to **Yes**. This option should be selected for channels selling F&B unless you wish to collect customer details.
- **Future Days.** This option is not required for F&B only channels, leave the field blank.
- **MinutesInThePast.** This option is not required for F&B only channels, leave the field blank.
- **MonthsInTheFuture.** This option is not required for F&B only channels, leave the field blank.
- **Call Centre.** For F&B channels select **No**.
- **Floor Limit.** Enter the limit on cashless spending before authorisation must be obtained.
- **Display Cashless Tab.** Select **Yes** if the cashless card payment method can be used with the channel.
- **Display Membership Tab.** For F&B channels select **No.**
- **Show Stadium Options.** For F&B channels select **No.**
- **Display Other Tab.** For F&B channels select **No.**
- **External Reference Search.** For F&B channels select **No.**
- **Display Card Registration Tab.** For F&B channels select **No.**
- **Product User Booking Search.** For F&B channels select **No.**
- **Hide Promo Button.** Select **Yes** to hide the **Promotions** button in EPOS/Kiosk. The Discount and Promotions button will continue to be displayed.
- **Ticket Buyback Un Offered Period.** This field can be left blank for F&B channels.
- **Contact Required Fields.** This field can be left blank for F&B channels.
- **Enable Customer Editing.** For F&B channels select No.
- **Enable Customer Adding.** For F&B channels select No.

- **Product User Required Fields.** This field can be left blank for F&B channels.
- **Allow Partial Series.** Leave set to **No** for F&B channels.
- **Allow Series Seats to be Changed.** Leave set to **No** for F&B channels.
- **Select Delivery Address.** Leave set to **No** for F&B channels.
- **Display Bookings in Unfulfilled Tab.** Select **Yes** to display the unfilled orders tab in the POS.
- **Enable Print at Home.** Set to **No** for F&B channels.
- **Allow Quick Cancel.** Set to **Yes** for F&B channels.
- **Show Beneficiary Entitled User.** Set to **No** for F&B channels.
- **Membership Number Read Only.** Set to **No** for F&B channels.
- **Cross Sell Products.** Select **Yes** if the system is to allow the offer of cross sell products.

Payment Defaults:

- **Send Customer Booking Confirmation.** Leave set to **No** for F&B channels.
- **Print Receipt.** Select **Yes** if you wish to print a receipt automatically. For fast moving Kiosks this option should be set to No.
- **Open Till.** Select **Yes** if you wish the till to be opened automatically when payment is taken.
- **Close Booking if Paid.** Select **Yes** if you wish the booking details to be automatically closed once full payment has been taken.
- **Refund Authorisation Required.** Select **Yes** if the POS Operator will require authorisation to provide a refund to a customer.
- **Validate Delivery Product**. Select **No** for F&B channels.

Contact:

- **Allow Bulk Email.** Leave set to **No** for F&B channels.
- **Collect Referred from Attribute.** Leave set to **No** for F&B channels.
- **Terms Acceptance Required.** Set to **No** for F&B channels.
- **Activation Required.** Set to **No** for F&B channels.

Behaviours:

- **Offer Additional Products.** Select **Yes** if upsell products are to be offered via the channel.

- **Return Stock Levels.** If stock levels are to be tracked and displayed for each product on the Channel, select **Yes.**
- **Do not create Stock Transactions.** Select **No** if you want to create stock transactions.

Away Tickets:

- **Away Ticket Details To Record.** Leave blank for F&B channels.

Donations:

- **Donation Product.** Not used for Green 4 F&B leave blank.
- **Donation Percent.** Not used for Green 4 F&B leave blank.

Tabs:

- **Allow Tabs.** Select **Yes** if tabs are allowed via the channel. Tabs are useful in a restaurant or bar environment where customers order a number of items over a period of time, before settling their tab at the end of their stay.
- **Tab Limit.** Enter the upper limit for tabs opened using the channel.
- **Tab Pincodes.** Enter **Yes** if the user will be required to enter a pin in order to add products to the tab.
- **Stock Products Only.** Select if only stock products can be added to a tab.

Settings:

- **Settings.** Enter any additional settings relating to the channel.
- **Password (Post XML Bookings).** Not used in Green 4 F&B.

Bowling Settings:

- None of the options in this section are required for F&B.

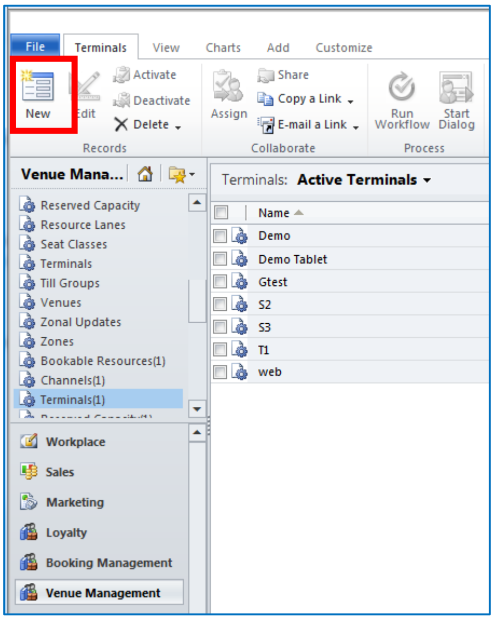
f) Once the details are complete select **Save and Close** on the ribbon.

2.2. SETTING UP THE TERMINALS

Next it is necessary to set the terminals using the channel to operate as a till, please note that this is usually completed by Green 4s consultants. This is done as follows:

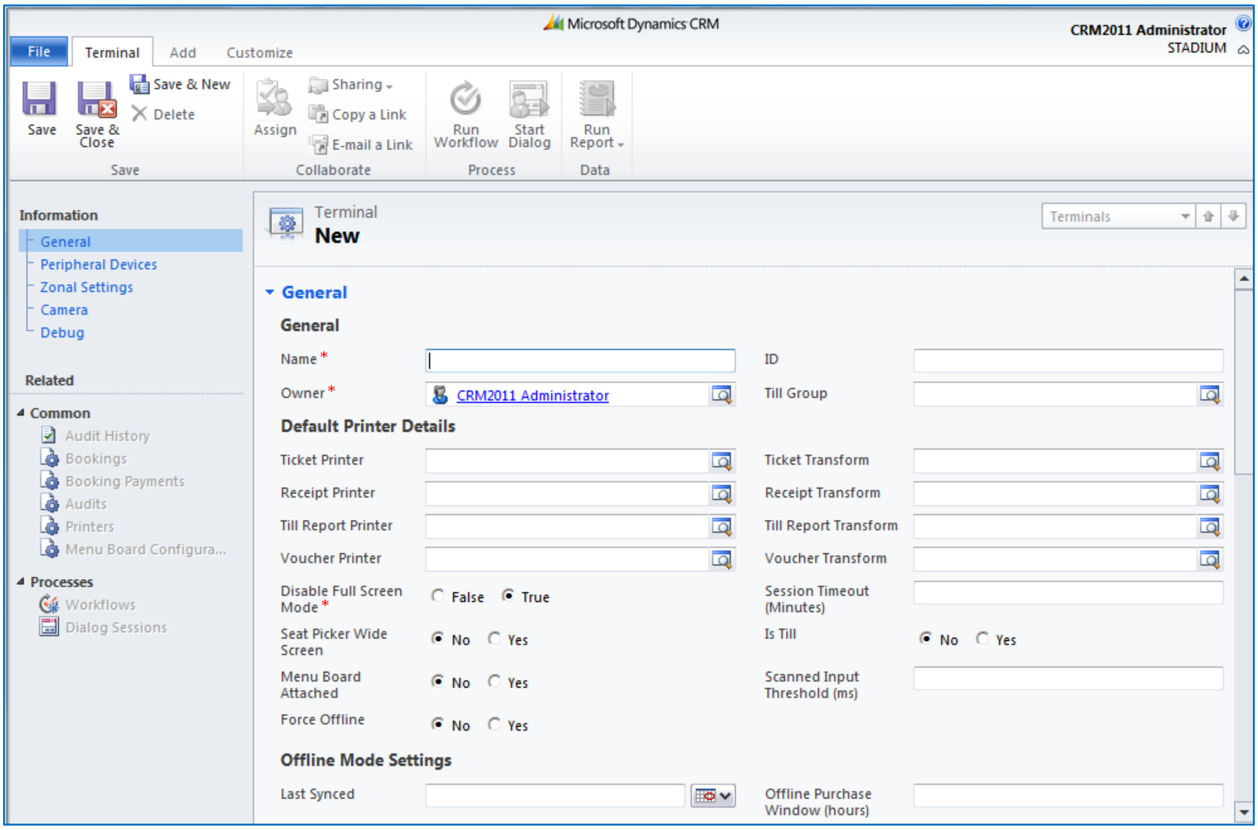
a) In the CRM **Navigation Panel** select **Venue Management** followed by **Terminals**.

b) The Terminals list view will be displayed:



c) Select **New** on the ribbon (highlighted in the above figure).

d) A blank Terminals form will be displayed:



e) Complete the following details:

General:

- **Name.** Enter a name for the terminal. The name may be used by other users to identify the terminal within Green 4 F&B, and therefore should reflect the identity of the printer, for example ShopTill1.
- **ID.** Enter an identification number for the till. The ID will be used by the system to identify the terminal.
- **Owner.** The owner field will be automatically filled with your CRM user name.
- **Till Group.** Use to group tills for reporting purposes.

Default Printer Details:

- **Ticket Printer.** Not required for Green 4 F&B.
- **Ticket Transform** Not required for Green 4 F&B.
- **Receipt Printer.** Use the Look Up Records dialog to select the printer the terminal will use to print receipts. Leave blank if the terminal is not attached to a suitable printer.
- **Receipt Transform.** Use the Look Up Records dialog to select the print transform (template) the terminal will use when printing receipts. Leave blank if the terminal is not attached to a suitable printer.
- **Till Report Printer.** Use the Look Up Records dialog to select the printer the terminal will use to print till reports. Leave blank if the terminal is not attached to a suitable printer.
- **Till Report Transform.** Use the Look Up Records dialog to select the print transform (template) the terminal will use when printing till reports. Leave blank if the terminal is not attached to a suitable ticket printer.
- **Voucher Printer.** Use the Look Up Records dialog to select the printer the terminal will use to print vouchers. Leave blank if the terminal is not attached to a suitable printer.
- **Voucher Transform.** Use the Look Up Records dialog to select the print transform (template) the terminal will use when vouchers. Leave blank if the terminal is not attached to a suitable ticket printer.
- **Member Card Printer.** Use the Look Up Records dialog to select the printer the terminal will use to print vouchers. Leave blank if the terminal is not attached to a suitable printer.
- **Member Card Transform.** Use the Look Up Records dialog to select the print transform (template) the terminal will use when vouchers. Leave blank if the terminal is not attached to a suitable ticket printer.
- **Disable Full Screen Mode.** The Green 4 F&B POS and Kiosk can run in full screen mode preventing the user from editing the screen size or closing the application using the Windows buttons in the top right hand corner. If you wish the terminal to run in full screen mode select **False**.
- **Session Timeout (Minutes).** Enter the timeout period for the Green 4 F&B application. The application will lock if the terminal is inactive for the timeout period entered. For example, if 10 is entered, the application will lock after 10 minutes of inactivity.

- **Seat Picker Wide Screen.** Not used in Green 4 F&B. Leave set to **No**.
- **Is Till.** Select **Yes** when creating a kiosk terminal. Kiosk terminals are used to sell stock products only, and can use a more graphical display of products.
- **Menu Board Attached.** Select **Yes** if a menu board is attached to the terminal. The menu board will display offers and products available via the terminal.
- **Scanned Input Threshold (ms).** Barcode / Wedge scanner configuration setting.
- **Force Offline.** Select **Yes** to force the terminal into offline mode.

Offline Mode Settings:

- **Last Synced.** The date and time the terminal was last synchronised. This will be blank if the terminal is not set up to function offline.
- **Offline Purchase Window (hours).** Enter the purchase window in hours for offline working.
- **Offline Till ID.** The terminals offline till ID. This field should be left blank unless using offline working.
- **Sync Interval.** Enter the sync interval for offline working.
- **Archive Days.** Enter the number of day's information that will be archived for offline working.
- **Days to download.** Enter the number of days' worth of information to down load for offline working.

Access Point:

- **Display Access Gate Tab.** Not used in Green 4 F&B. Leave set to **No**.
- **Gate Reader Details.** Not used in Green 4 F&B. Leave blank.
- **Gate Service Location.** Not used in Green 4 F&B. Leave blank.
- **Gate Tab Columns.** Not used in Green 4 F&B. Leave blank.
- **Gate Tab Rows.** Not used in Green 4 F&B. Leave blank.
- **Access Point.** Not used in Green 4 F&B. Leave blank.

Peripheral Devices:

- **Card Reader Attached.** Select **Yes** if a card reader is attached.
- **Card Reader Name.** Enter the name of the attached card reader.

Zonal Settings:

- **Ledger Service Location.** Not used in Green 4 F&B. Leave blank.

Camera:

- **Camera URL.** If a camera is linked to the terminal, enter the URL.
- **Camera Refresh Rate.** Enter the refresh rate for the attached camera.

Debug:

- **Service Proxy Logfile.** Not used in Green 4 F&B. Leave blank.

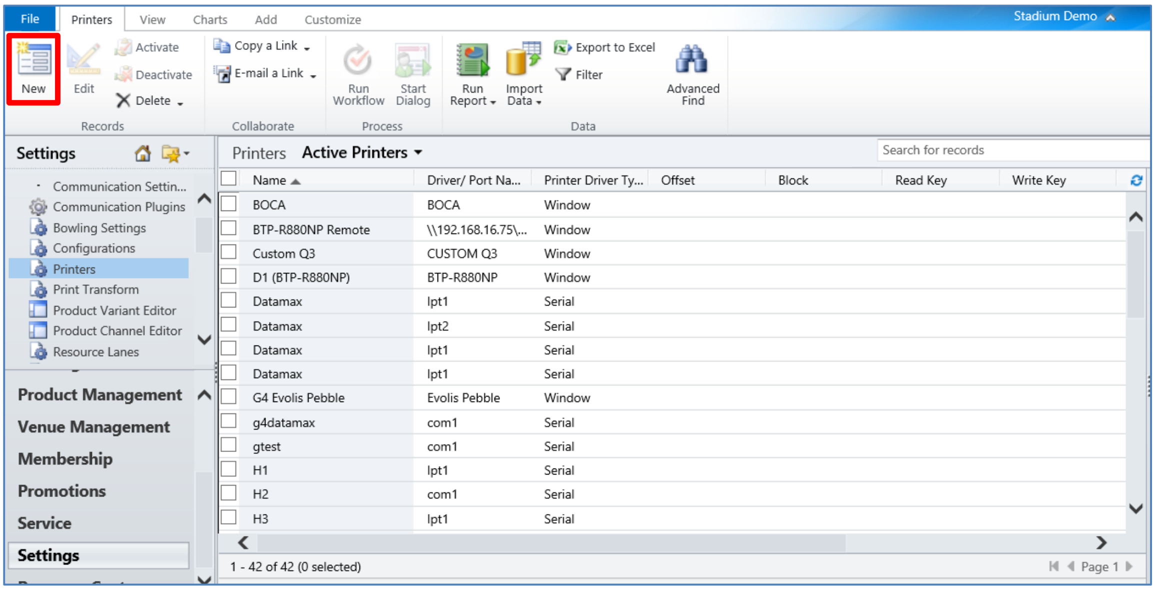
f) Once the details are complete click **Save and Close** on the ribbon.

2.3. SETTING UP A PRINTER AND TRANSFORM

If using a printer with the terminal, it will be necessary to set up the printer and transform as described in the following sections:

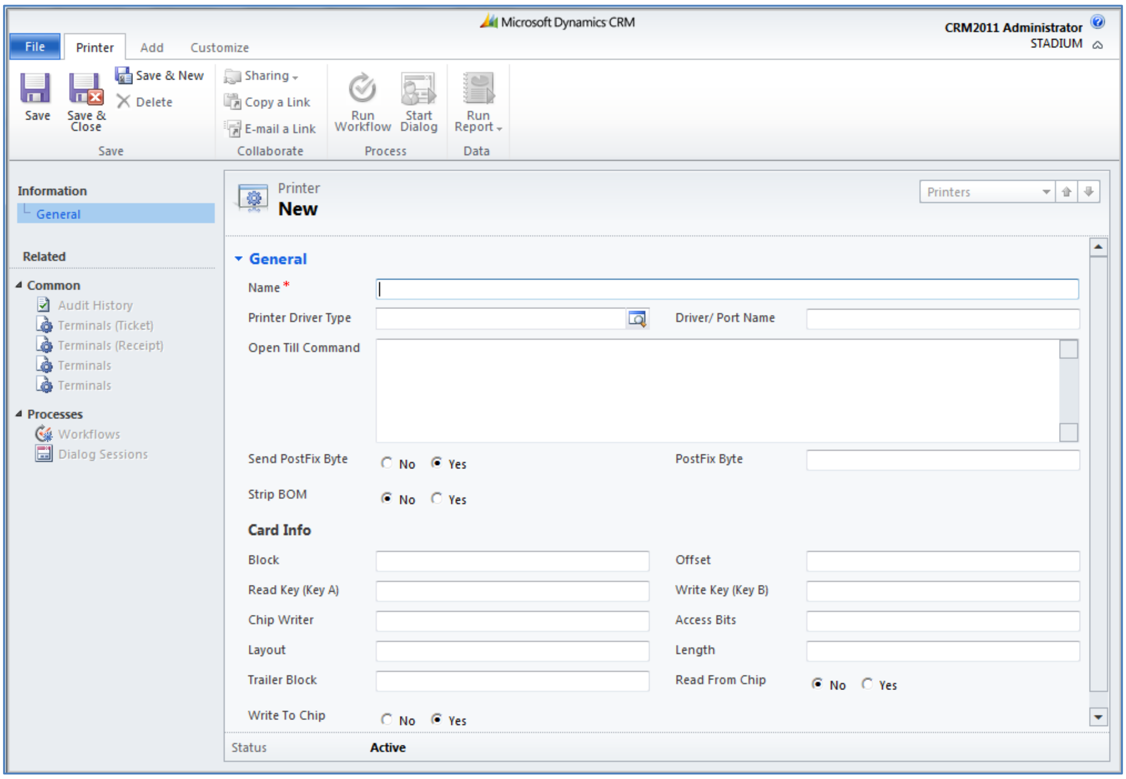
a) In the CRM **Navigation Panel** select **Settings** followed by **Printers**.

b) The Printers list view will be displayed:



c) Select **New** on the ribbon (highlighted in the above figure).

d) A blank Printers form will be displayed:



e) Complete the following details:

- **Name.** Enter the name of the printer. The name may be used by other users to identify the printer, and therefore should reflect the printer's name and/or location, e.g. Bar Receipt Printer.
- **Printer Driver Type.** Use the Look Up Records dialog to select the printer driver type before clicking **OK** to return to the Printers form. The option selected (Serial or Windows) will determine the information that needs to be entered into the Driver / Port Name field.
- **Driver / Port Name.** If the printer is a serial printer, enter the port name. If the printer is a Windows printer enter the window driver name.
- **Open Till Command.** Enter the open till command.
- **Send PostFix Byte.** Printer and contactless card configuration settings.
- **PostFix Byte.** Printer and contactless card configuration settings.
- **Strip BOM**. Printer and contactless card configuration settings.
- **Interval.** Printer and contactless card configuration settings.
- **Batch.** Printer and contactless card configuration settings.
- **Print Media.** Printer and contactless card configuration settings.

- **Block.** Printer and contactless card configuration settings.
- **Offset.** Printer and contactless card configuration settings.
- **Read Key (Key A).** Printer and contactless card configuration settings.
- **Write Key (Key B).** Printer and contactless card configuration settings.
- **Chip Writer.** Printer and contactless card configuration settings.
- **Access Bits.** Printer and contactless card configuration settings.
- **Layout.** Printer and contactless card configuration settings.
- **Length.** Printer and contactless card configuration settings.
- **Trailer Block.** Printer and contactless card configuration settings.
- **Read From Chip.** Printer and contactless card configuration settings.
- **Write to Chip.** Printer and contactless card configuration settings.

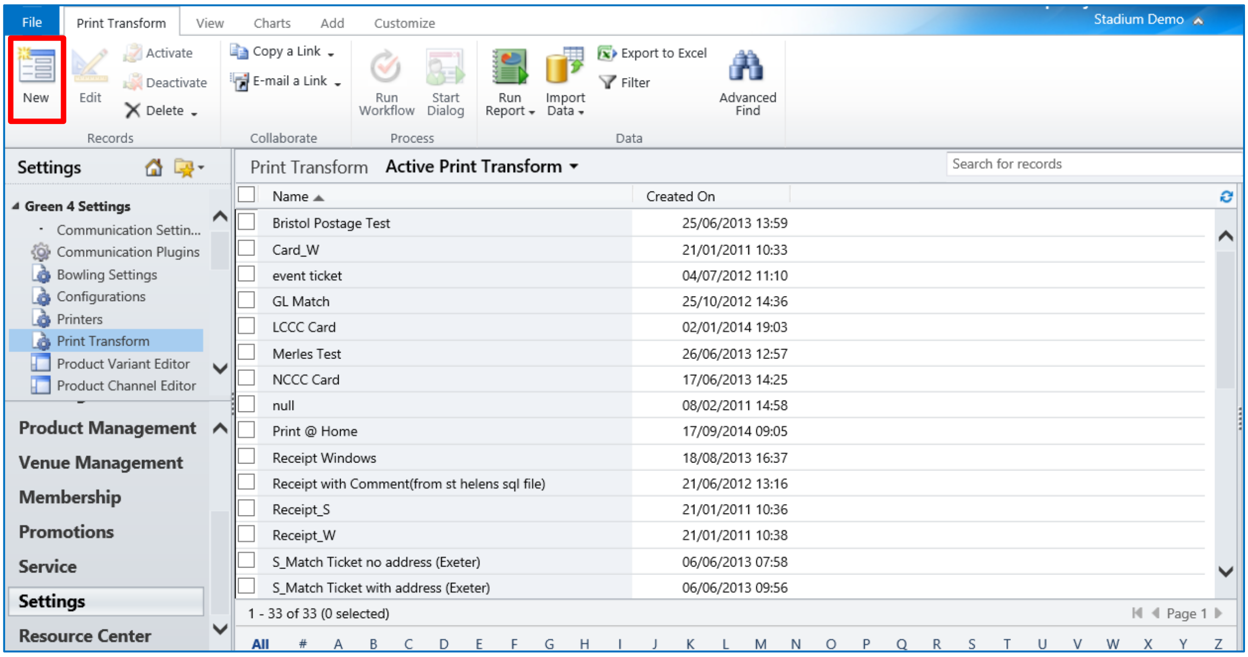
f) Once the settings are complete click **Save and Close** on the ribbon.

2.4. CREATING A PRINT TRANSFORM RECORD

The Print Transform entity is used to define the templates used for receipts or till reports. To create a Print Transform record:

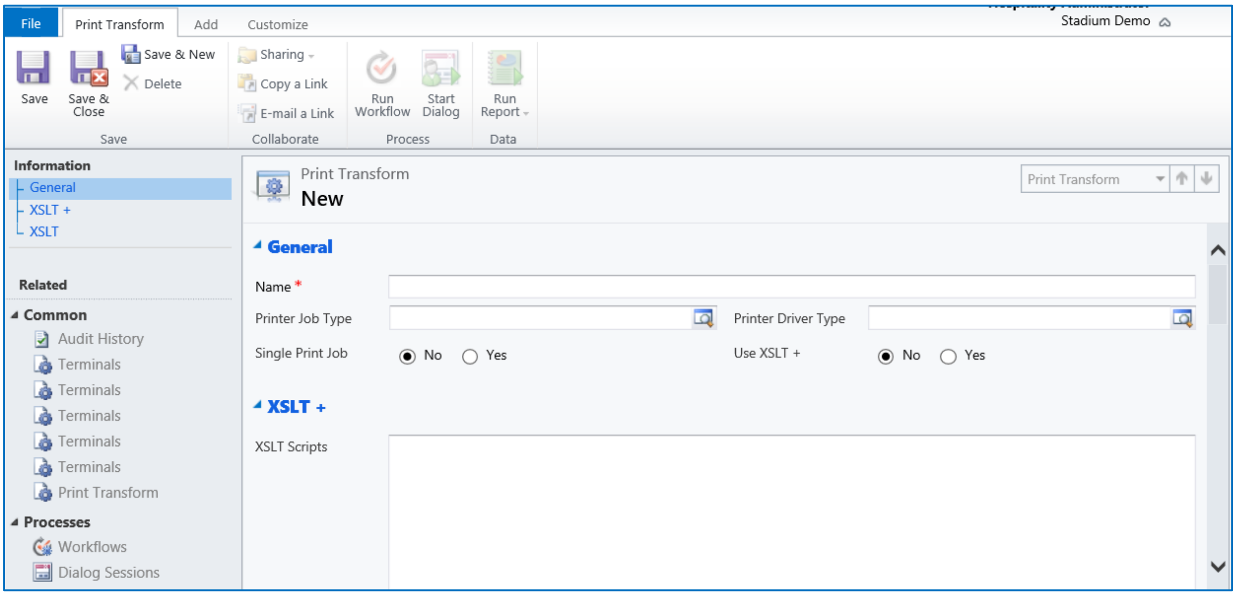
a) In the CRM **Navigation Panel** select **Settings** followed by **Print Transforms**.

b) The Print Transforms list view will be displayed:



c) Select **New** on the ribbon (highlighted in the above figure).

d) A blank Print Transform form will be displayed:



e) Complete the following details:

- **Name.** Enter a name for the transform. The name will be used by other users to identify the purpose of the transform and should therefore reflect the purpose of the transform. For example Ticket with Address.
- **Printer Job Type.** Use the Look Up Records dialog to find the appropriate printer job type. If a suitable job type does not exist, select New on the dialog and complete the requested details. Select Save and Close on the ribbon to return to the Look Up Records dialog.
- **Printer Driver Type.** Use the Look Up Records dialog to select the type of printer the transform can be used with.
- **Single Print Job.** Not required for F&B set up.
- **Use XSLT +.** Not required for F&B set up.
- **Transform.** Enter the transform details using XML. The transform XML defines the layout of the printout and additionally details the information that will be pulled from the Green 4 F&B database and used for printing, for example customer name and product name. The transform XML will determine the information and layout included in the print out.

f) Once the details are complete click **Save and Close**.

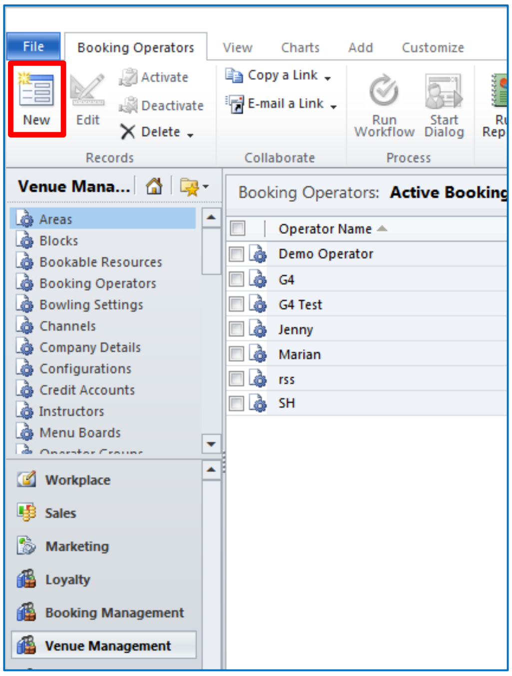
3. SETTING UP OPERATORS

Each Green 4 F&B user must be added to the system as a booking operator. Booking operators differ from CRM users and will be unable to log directly into CRM.

To create a Booking Operator record:

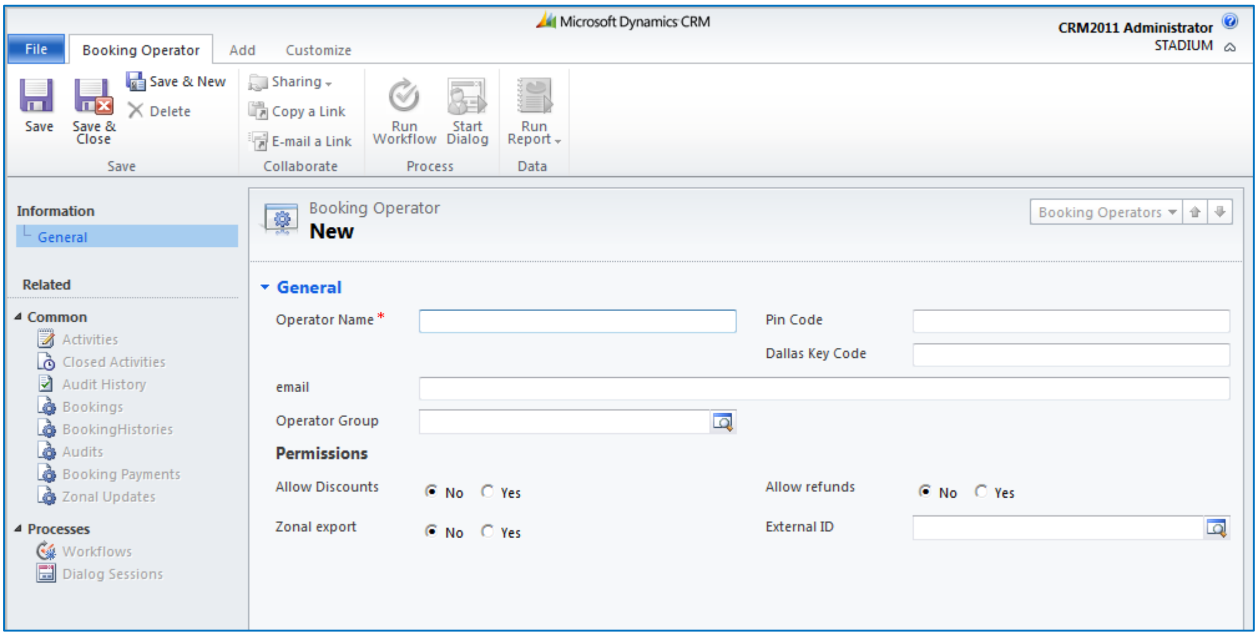
a) In the CRM **Navigation Panel** select **Venue Management** followed by **Booking Operators**.

b) The Booking Operators list view will be displayed:



c) Select **New** on the ribbon (highlighted in the above figure).

d) A blank Booking Operator form will be displayed:



e) Complete the following details:

- **Operator Name.** Enter the operator's name.
- **Pin Code.** Enter a pin for the operator. The operator will use the pin to log into the Green 4 F&B application. The pin provided must be unique within Green 4 F&B.
- **Dallas Key Code.** If using Dallas Key fobs to log into the POS, enter the Dallas key number.
- **Email.** Enter the operator's email address.
- **Operator Group.** Select the operator group to which the operator belongs. Operator groups are used to group users into logical subsets.
- **Allow Discounts.** Select **Yes** if the operator is allowed to apply discounts to a purchase.
- **Zonal Export.** Select **Yes** if the operator is allowed to carry out Zonal exports.
- **Allow Refunds.** Select **Yes** if the operator is allowed to make refunds to the customer.
- **External ID.** Use the **Find** button to select the user's external Zonal ID. This external ID will link the user's Green 4 Ticketing login details with their Zonal account.

f) Once the settings are complete click **Save and Close** on the ribbon.

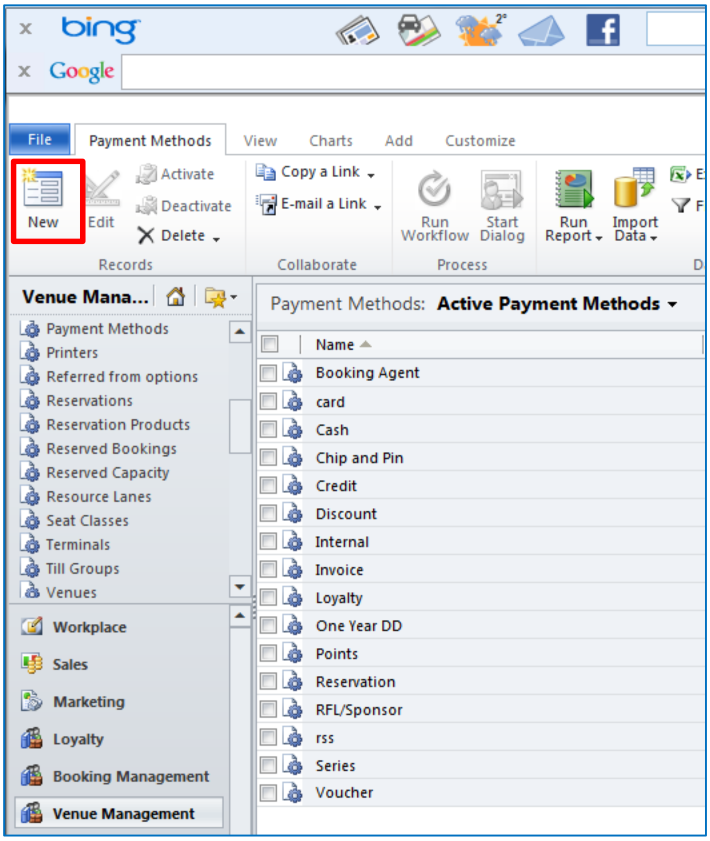
4. SETTING UP PAYMENT METHODS

The Payment Methods entity is used to define the payment methods accepted by your installation of the Green 4 F&B application. Please note that for different Payment Methods, not all of fields found in the Payment Method form will need completing. The fields that need completing depend upon the Payment Method that is being created.

To create a Payment Method record:

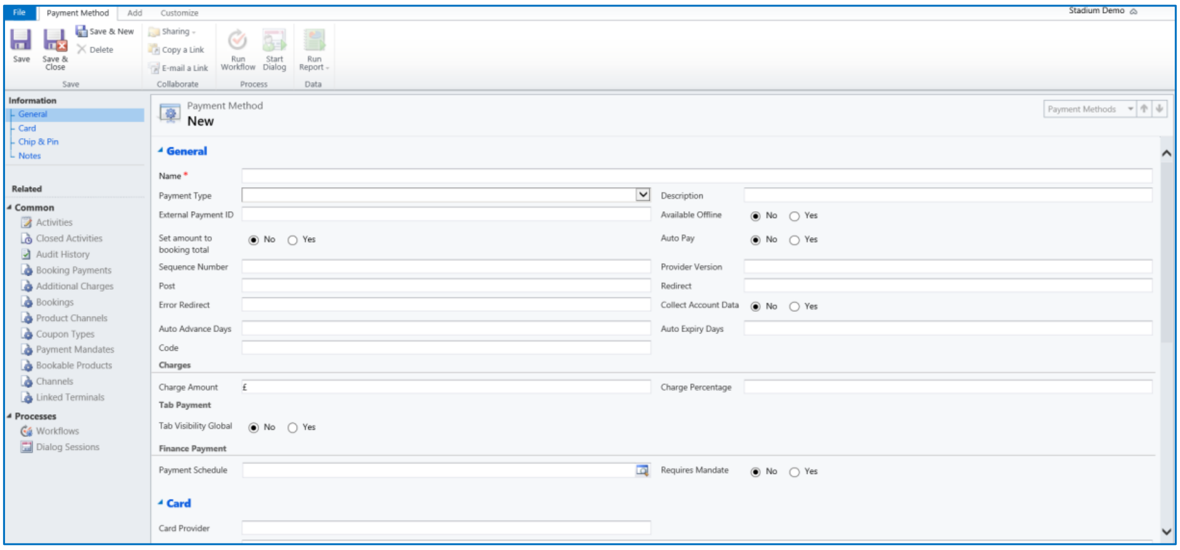
a) In the CRM **Navigation Panel** select **Venue Management** followed by **Payment Methods**.

b) The Payment Method list view will be displayed:



c) Select **New** on the ribbon (highlighted in the above figure).

d) A blank Payment Method form will be displayed:



e) Complete the following details:

General:

- **Name.** Enter a name for the payment type. The name will be displayed to the user in the Green 4 F&B application when they select to pay for their goods.
- **Payment Type.** Use the drop-down list to select the type of payment, e.g. Card, Cash, Chip and Pin.
- **Description.** Enter a short description of the payment method.
- **ExternalID.** Enter the external id for the payment method.
- **Available Offline.** Select **Yes** if the payment method is to be available offline.
- **Set Amount to Booking Total.** Not used in Green 4 F&B.
- **Auto Pay.** Not used in Green 4 F&B.
- **Sequence Number.** The sequence number will determine the order in which payment methods are displayed.
- **Provider Version.** Can be passed to the payment gateway if we need to use a certain version of the card payment provider.
- **Post.** This can be used as the URL with which to post the initial payment data. Typically a card payment service URL.

- **Redirect.** This is the URL to redirect the customer after the initial prepare payment. Typically 'progress.aspx' within the ticketing website.
- **Error Redirect.** Acts as a redirect if an error occurs.
- **Collect Account Data.** Collect Account Data. Select **Yes** if you would like card details to be collected.
- **Auto Advance Days** For auto payment types, optionally specify number of days in advance of nominal payment date when payment should be submitted
- **Auto Expiry Days.** Number of expiry days for submitted Auto payments.
- **Code.** Enter a code for the payment method type if required.

Charges:

- **Charge Amount.** Enter the amount that will be automatically added as a charge when this payment method is used.
- **Charge Percentage.** Enter the percentage that will be automatically added as a charge when this payment method is used.
- **Tab Visibility Global.** Select **Yes** if you wish tabs to be available on all terminals. Only required if setting up a tab payment method.

Finance Payment:

- **Payment Schedule**. Use the Look Up to select the relevant Payment Schedule. If no payment schedule exists, click on New to create a new one. This is relevant and should be completed when setting up a Direct Debit.
- **Requires Mandate.** Select **Yes** if the payment requires a Mandate. Typically used for the setup of the Direct Debit payment method.

Card:

- **Card Provider.** Enter the name of the card provider accepted.
- **Gateway URL.** Enter the URL users are transferred to when making a payment through the payment gateway.
- **Payer Auth URL.** Enter the URL users are directed to when authorising payments through the payment gateway.
- **ByPass Card Provider.** Select **Yes** to bypass the payment gateway settings (used for testing).
- **Mail Order.** Select **No** for F&B.

- **Merchant Reference.** Enter your Merchant Reference as supplied by the payment gateway.
- **Merchant Id.** Enter your Merchant Id as supplied by payment gateway.
- **Account Id.** Enter your Account Id as supplied by payment gateway.
- **Passcode.** Enter your account Passcode as supplied by the payment gateway.
- **Currency Culture.** Payment provider specific configuration.
- **Organisation Id.** Enter your Organisation Id as provided by the payment gateway
- **Refund Password.** Enter the password required when refunds are processed.
- **3-D Secure.** Select **Yes** if the payment gate utilises the 3-D Secure authentication.
- **Currency Code.** Enter the currency code.
- **Currency Exponent.** Payment provider specific configuration.
- **Customer IP Address.** Payment provider specific configuration.

Chip & Pin:

- **Provider.** Enter the name of the chip and pin provider.
- **Account Name.** Enter your organisation's Account Name as provided by the chip and pin provider.
- **Account No.** Enter your Account Number as supplied by the payment gateway.
- **Host.** Payment provider specific configuration.
- **Port.** Payment provider specific configuration.
- **Cardholder Present.** Indicates if the cardholder is present when using the payment method. For card payments it may be necessary to set up two payment methods: one for when the card holder is present, and one for when the card holder is absent.
- **Keep Alive Message.** Message sent periodically to prevent the chip and pin connection entering into idle mode.
- **Merchant ID.** Your organisation's merchant ID as provided by the chip and pin provider.
- **Transaction Reference Prefix.** Payment provider specific configuration.
- **Chip Pin Connection Timeout.** Enter the timeout period for the chip and pin. Transactions will be aborted if a response from the server is not received within the timeout period.
- **Payment Transaction Type Code.** Transaction code used for payments made via chip and pin.

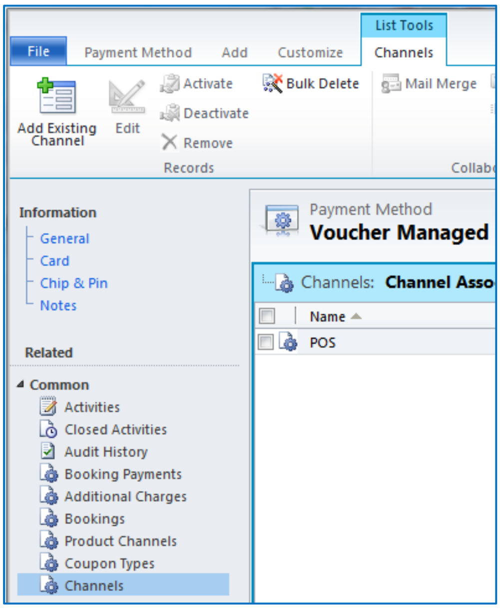
- **Refund Transaction Type Code.** Refund Transaction Type Code. Transaction code used for refunds issued via chip and pin.
- **Auth Code Required.** Select **Yes** if an authorisation code is required when submitting chip and pin payments.
- **Auth Code ReadOnly.** Select **Yes** if the authorisation code is to be a read only field.

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

Next it is necessary to define the channels that will use the payment method. To achieve this:

a) Select **Channels** in the **Form Navigation** panel.

b) The Channels list view will be displayed:



c) Select **Add Existing Channel** from the ribbon.

d) The Look Up Records dialog will be displayed. Select the appropriate channel before selecting **OK** to continue.

e) Repeat the above process for all the channels that are going to use the payment method.

Note: If your organisation allows "zero deposit" bookings, a zero deposit payment method must be set up.

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5. USING TABS

The tab option in Green 4 F&B allows customers to add goods to a tab during their visit and subsequently settle the amount owing as they leave. To use tabs a number of options must be set up within the Green 4 F&B configuration:

5.1. CHANNEL SETTINGS

To create a tab a number of settings are required in the Channel:

a) Select **Venue Management** then **Channels**. Ensure the following settings are defined for the **channel** using tabs:

- **Allow Tabs.** Select **Yes** to allow tabs to be used via the channel.
- **Tab Pin codes.** Select **Yes** if the customer is required to set a pin for the tab. If pin are used, the customer will have to provide the pin each time they wish to add items to their tab.
- **Tab Limit.** Enter the maximum amount customers are allowed to put on a tab before settling their bill.
- **Stock Products Only.** Select **Yes** if a tab payment can only be used for stock products (for example food and drinks).

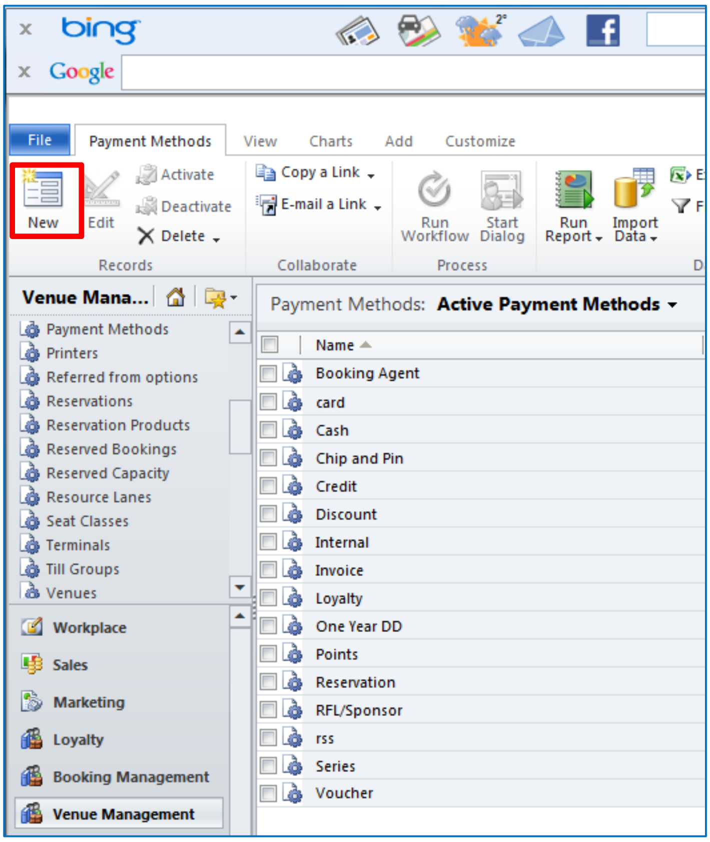
b) Once the settings are complete select **Save and Close** on the ribbon to save the changes made to the channel settings.

5.2. PAYMENT METHOD SETTINGS

To set up the Tab payment method carry out the following:

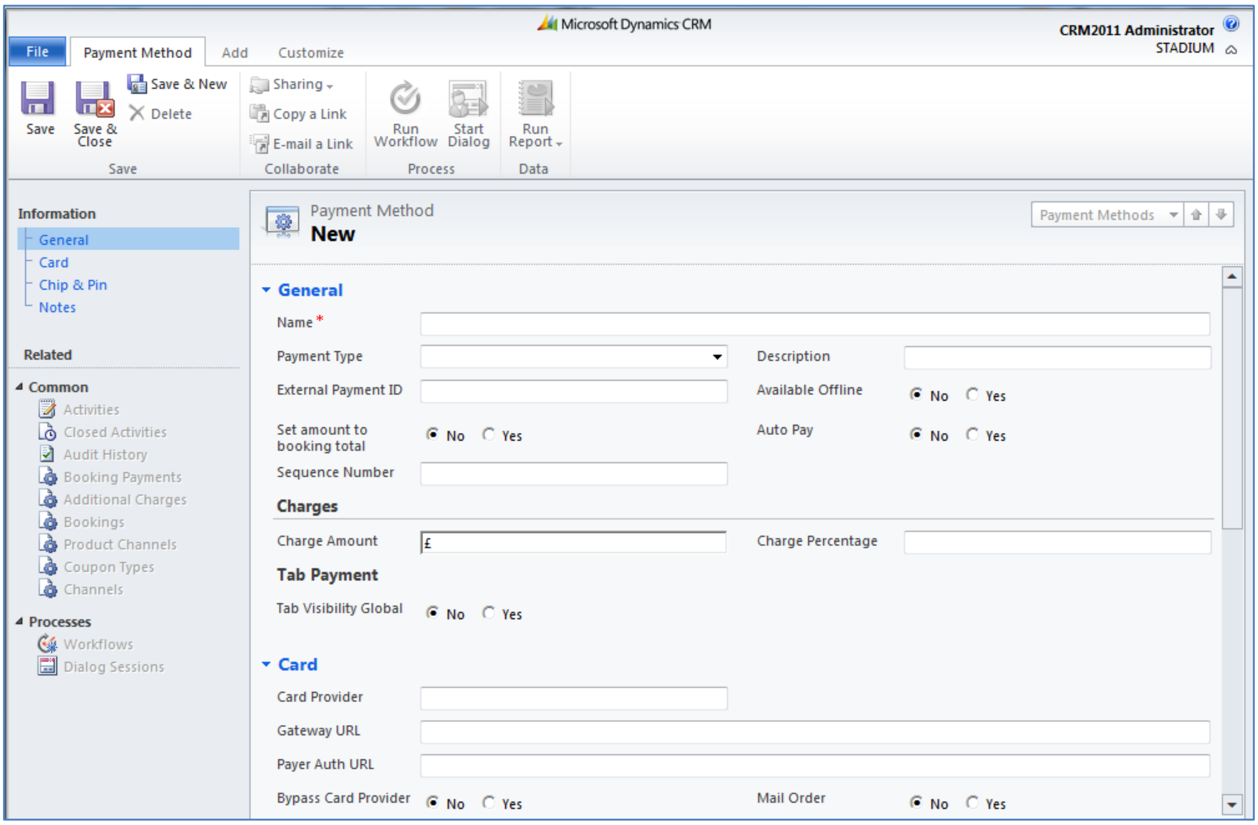
a) In the CRM **Navigation Panel** select **Venue Management** followed by **Payment Methods**.

b) The Payment Method list view will be displayed:



c) Select **New** on the ribbon (highlighted in the above figure).

d) A blank Payment Method form will be displayed:



e) Complete the following details:

General:

- **Name.** Enter a name for the payment type. The name will be displayed to the user in the Green 4 F&B application when they select to pay for their goods, for example Tab.
- **Payment Type.** Use the drop-down list to select the type of payment. Select **Tab** from the list provided.
- **Description.** Enter a short description of the payment method.
- **ExternalID.** Enter the external id for the payment method.
- **Available Offline.** Select **Yes** if the payment method is to be available offline.
- **Set Amount to Booking Total.** Not used in Green 4 F&B.
- **Auto Pay.** Not used in Green 4 F&B.
- **Sequence Number.** The sequence number will determine the order in which payment methods are displayed.

No other fields in this section need to be completed on this form.

Charges:

- **Charge Amount.** Enter the amount that will be automatically added as a charge when this payment method is used.
- **Charge Percentage.** Enter the percentage that will be automatically added as a charge when this payment method is used.
- **Tab Visibility Global.** Ensure **Yes** is selected to ensure Tabs can be viewed and settled across all terminals using the payment method.

Finance Payment:

No fields in this section need to be completed on this form.

Card:

No fields in this section need to be completed on this form.

Chip & Pin:

No fields in this section need to be completed on this form.

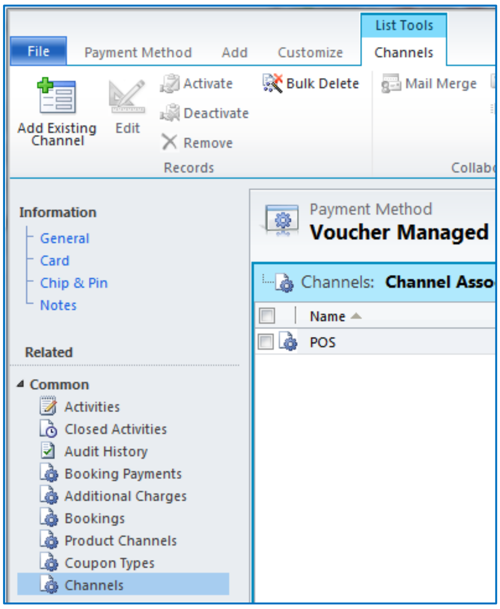
f) Once the details are complete select **Save** on the toolbar.

DEFINE THE CHANNELS

Next it is necessary to define the channels that will use the Tab payment method. To achieve this:

a) Select **Channels** in the **Form Navigation** panel.

b) The Channels list view will be displayed:



c) Select **Add Existing Channel** from the ribbon.

d) The Look Up Records dialog will be displayed. Select the appropriate channel before selecting **OK** to continue.

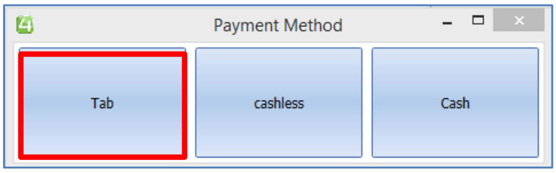
e) Repeat the above process for all the channels that are going to use the payment method

5.3. ADDING ITEMS TO A NEW TAB IN THE POS

To create a new tab for a customer when they initially order, carry out the following in the POS:

a) Add the items to the shopping cart as normal. Once all items have been added to the cart, select **Add Payment**.

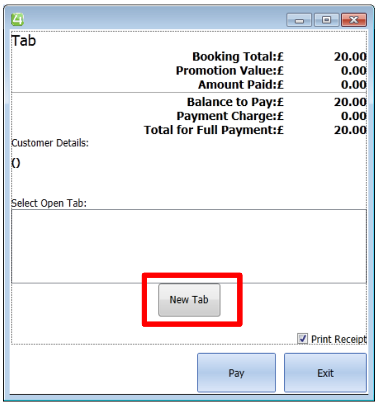
b) From the Payment Method dialog select **Tab.**



Note: Depending upon your configuration of the Green 4 F&B system you may be asked to provide additional information, for example purchaser's name before the payment method dialog is displayed.

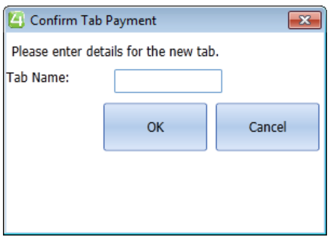
c) If no existing tabs are open, a warning will be displayed. Select **OK** to continue.

d) The Tab screen will be displayed:



e) Select **New Tab** (highlighted above).

f) The **Confirm Tab Payment** screen will be displayed:



g) Enter a **name** for the tab, for example table number or customer name, before selecting **OK**.

If your Green 4 EPOS has been set up to use pin codes with tabs, when you create a new tab you will be requested to enter the following additional details:

- **Tab Pin.** Enter the pin number to be used for the tab.
- **Confirm Pin.** Re-enter the pin number.

The details of the pin should be given to the customer, who will need to give you the pin number each time they attempt to add goods to their tab.

h) The Tab dialog will be redisplayed. Select **Exit** to continue.

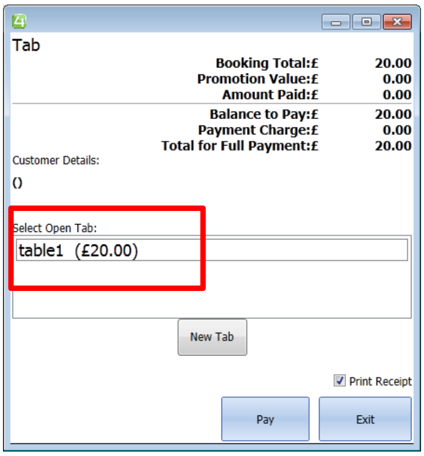
5.4. ADDING ITEMS TO AN EXISTING TAB IN THE POS

a) Add the items to the shopping cart as normal. Once all items have been added to the cart, select **Add Payment**.

b) From the Payment Method dialog select **Tab**.

Alternatively the Pay to Tab option below the shopping cart can be used to open the Tab window directly.

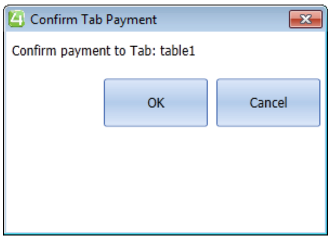
c) The Tab screen will be displayed:



d) The details of any existing tabs will be listed (highlighted above).

e) Select the tab you wish to add the current order to.

f) The Confirm Tab payment dialog will be displayed. Select **OK** to continue.



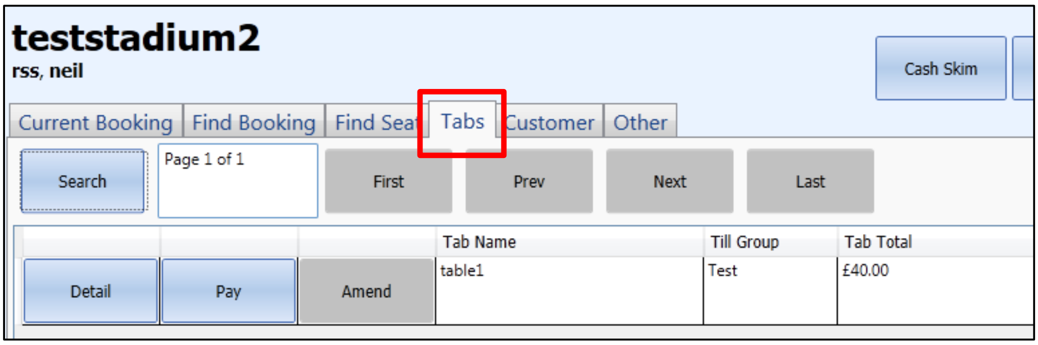
If Green 4 EPOS has been set up to use pin codes with tabs, when you attempt to add an item to an existing tab you will be requested to enter the **tab pin**. The details of the pin will be given to you by the customer. You will only be able to add items to an existing tab if the correct pin is given.

g) The Tab dialog will be redisplayed. Select **Exit** to continue.

5.5. SETTLING A TAB IN THE POS

When the customer is ready to settle the tab, carry out the following:

a) Select the **Tabs** heading as shown below:



b) A list of the current open tabs will be displayed.

c) Select **Pay** alongside the tab that you wish to settle. If you wish to review the details of the tab first, select **Detail** to open the tab details. From the Details dialog you can select **Pay** to continue.

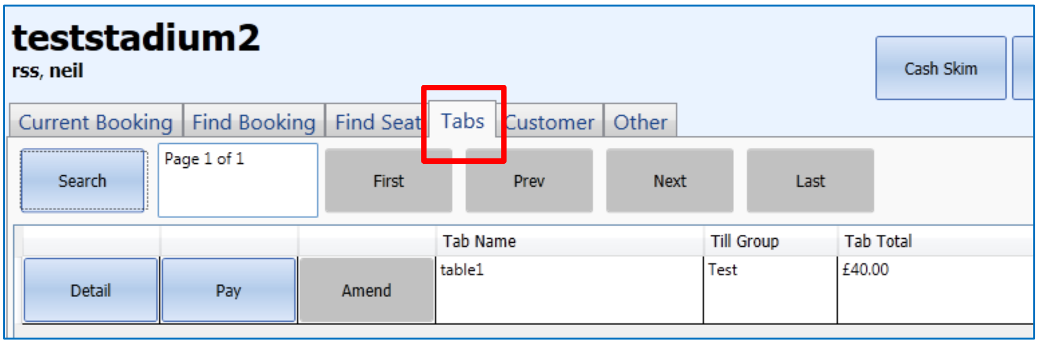
d) The shopping cart will be opened displaying details of all the items added to the tab. Select **Add Payment** to continue.

e) The Payment Method dialog will be displayed. Select the appropriate option and process the customer's payment.

5.6. AMENDING A TAB IN THE POS

If the customer disputes the items included on the tab, the details can be amended as follows:

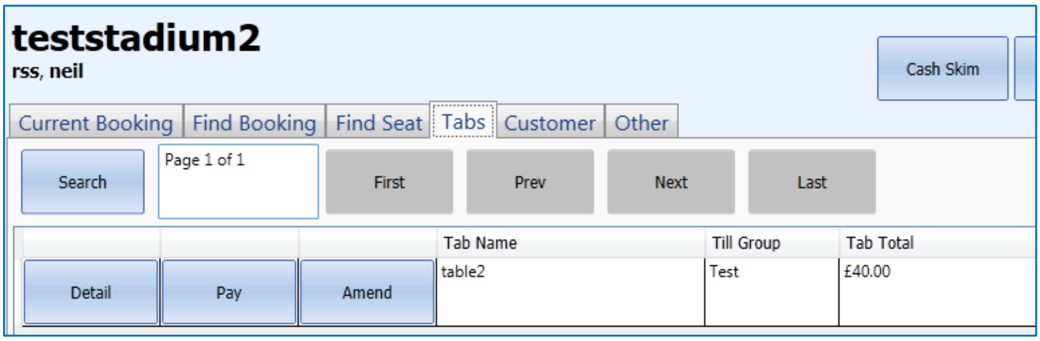
a) Select the **Tabs** heading as shown below:



b) A list of the current open tabs will be displayed.

c) Select **Pay** alongside the tab that you wish to settle.

d) The tab details will be opened in the shopping cart. If the details are incorrect, re-open the Tabs view:



e) Alongside the tab you have selected to pay, the Amend option will now be available. Select **Amend** to continue.

f) The shopping cart will be refreshed to show the tab details in the edit mode. Make the necessary changes to the tab before selecting **Add Payment** to continue.

g) The Payment Method dialog will be displayed. Select the appropriate option and process the customer's payment.

6. SETTING UP PRODUCTS

The sale of stock products (e.g. food and beverages) through Green 4 F&B relies upon a number of entities within the system, all of which must be correctly configured in order to place the product on sale at the correct price.

The flow below is the process to place a Food or Beverage product on Sale:

6.1. CREATE THE VARIANT TYPES

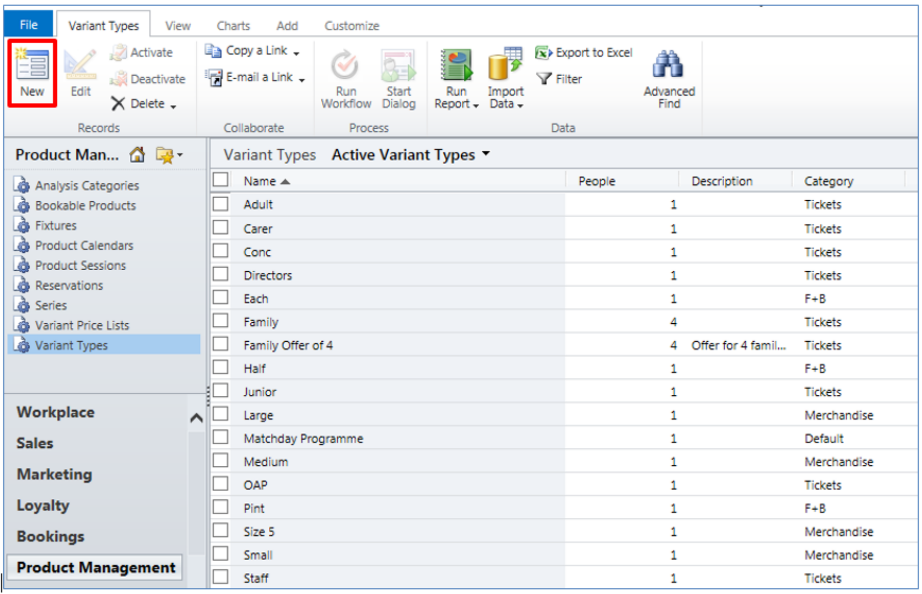
Variant Type describes the type of Bookable Product you can purchase. For example a type of drink Bookable Product may have a variant types of a pint and half pint whereas for food, the variants may be regular meal and small meal. Once Variant Types have been set up in the system, they can be used for different product types and do not need to be set up again. Where possible, it is recommended that you re-use Variant Types, so before setting up a new Variant Type, check that it does not already exist.

The Variant Type entity is used to create categories of products, for example Pint and half a pint. To create a Variant Type record:

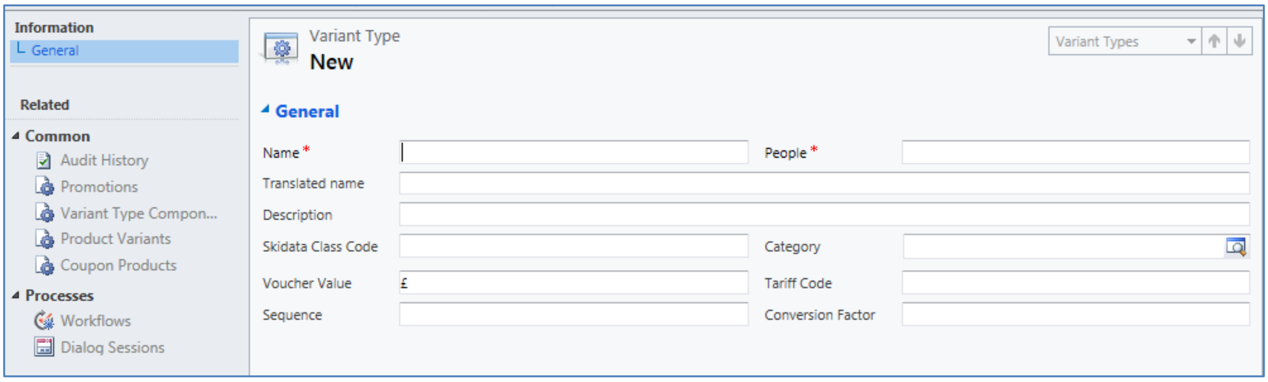
a) In the CRM **Navigation Panel**, select **Product Management** followed by **Variant Types**.

b) The Variant Types view will be displayed showing a list of all the Variant Types that meet the current view criteria.

c) To add a new Variant Type, select **New** on the ribbon (highlighted in the figure below).



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



- **Name.** Enter a name for the variant type.
- **People.** Enter the number of people included in the variant type. For F&B 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 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.

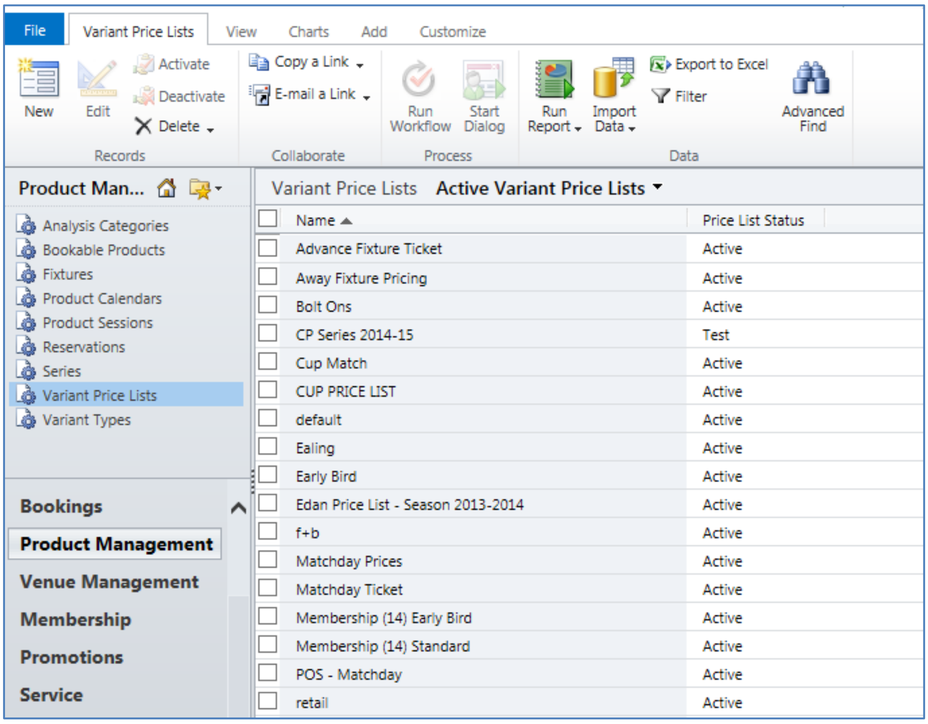
6.2. CREATE THE VARIANT PRICE LIST

Create the Variant Types → Create the Variant Price List → Set up your Channel Price List → Create the Bookable Product

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.
- **Price List Status.** Select the price list status from the drop-down list. Only price lists with a status of Active will be used to provide pricing information in Green 4 Ticketing.

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

6.3. SET UP YOUR CHANNEL PRICE LISTS

Create the Variant Types → Create the Variant Price List → Set up your Channel Price List → Create the Bookable Product

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

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

To set up a channel price list:

a) On the CRM navigation panel, select **Sales Plan** on the **Product Management** tab.

b) A list of sales plans matching the view criteria will be displayed.

c) Open the **Default Sales Plan** (the default sales plan should be linked to the company details record in CRM).

d) Select **Channel Price List** in the form navigation area.

e) A list of channel price lists that have been previously linked to the variant price list will be shown. Select **Add New Channel Price List** on the ribbon.

f) A blank channel price list form will be displayed. Complete the following details:

- **Name.** The name of the channel price list.
- **Channel.** Select the Look Up icon alongside the field. The Look Up Records dialog will be displayed. Select the appropriate channel before clicking **OK** to continue.
- **On Sale Date.** Enter the date and time when the price list will be available for use by the channel. An On Sale Date must be entered when creating a price list for stock products.
- **Marketing List.** Select the marketing list the channel price list relates to. If a marketing list is applied to a channel price list, only contacts that have been added to the marketing list will use the channel price list. This option can be used to give beneficial prices to people that have previously bought a particular product, for example a membership product. Preferential pricing can either be driven by the use of a different variant price list, or by entering a discount percent.
- **Discount Percent.** If using a discount enter the percentage discount offered to users of the channel price list. This option is used in conjunction with a marketing list to offer members of the marketing list a discount.
- **Discount Category.** If using a discount use the lookup to select the product category the discount percent will be applied to. If a product category is not entered, the discount percent will be applied to all products.
- **Sequence.** The sequence number is used to determine which channel price list is used if there is more than one valid channel price list available.
- **Variant Price List.** Use the Lookup Records dialog to select the appropriate price list. The price list that you are to use for the bookable product should be selected.

- **Off Sale Date.** Enter the date and time when the price list will stop being available for use by the channel. An Off Sale Date must be entered when creating a price list for stock products.
- **Max Quantity.** This option, when used in conjunction with a marketing list can be used to limit the number of a selected product a customer can purchase. This option can be used to limit the number of products a customer can buy at a preferential rate. Alternatively this option can be used to limit the number of tickets a member can purchase before general release.
- **Discount Rounding.** Enter the discount rounding i.e. to the nearest penny, 10p, pound. If a value is not entered the system will default to rounding to a penny.

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

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

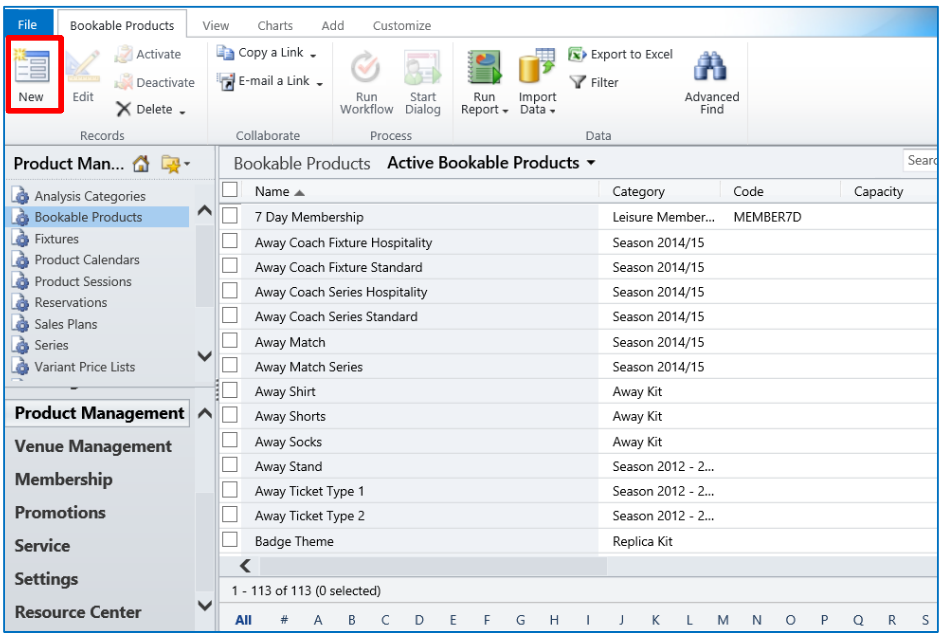
A channel price list will need to be created for each Variant Price List – Channel combination created.

6.4. CREATE THE BOOKABLE PRODUCT

The Bookable Product entity is used to represent products that are sold, for example a Pint of Fosters. For each product that you are selling through the system (i.e. a food/beverage) you must create a Bookable Product.

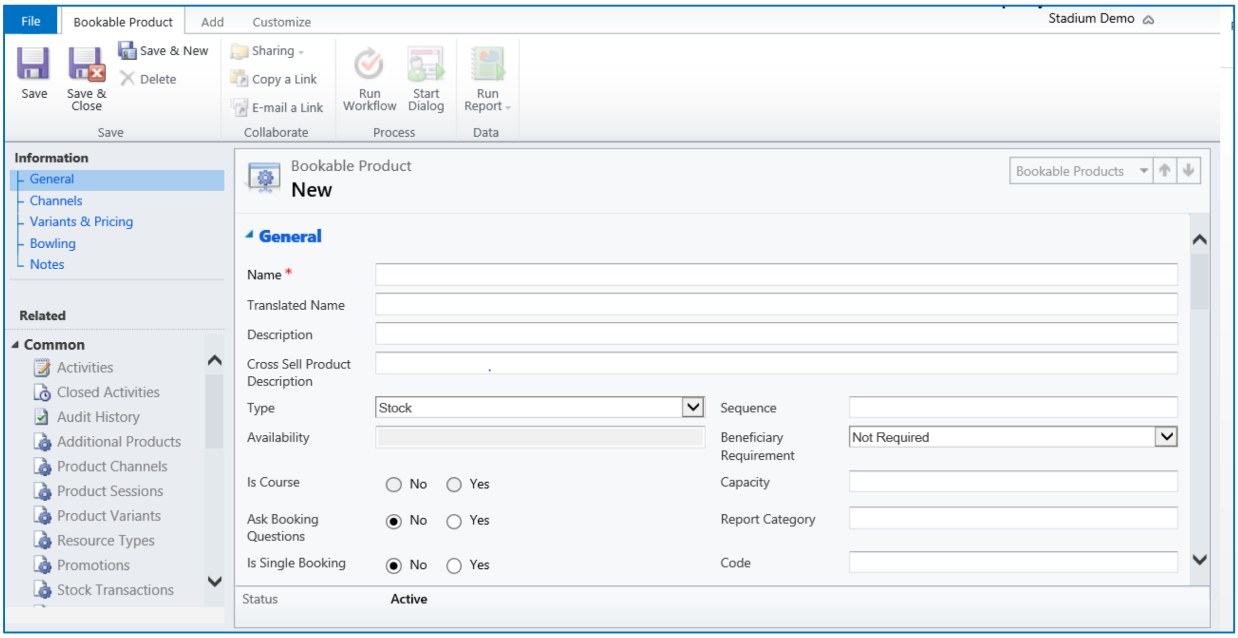
a) In the CRM **Navigation Panel** select **Product Management** followed by **Bookable Product**.

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 customers, and should therefore reflect the nature of the product.
- **Translated Name.** Used for translated implementations.
- **Description.** Enter a description of the product.
- **Cross Sell Product Description.** If using Cross Sell products, enter a description of the product here.
- **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.** 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.
- **Voucher Valid Days.** Used for voucher bookable products.

- **External Product ID.** Can be used to link the bookable product to an external list of products.

Referring Entities:

- **Category.** Use the Look Up Records dialog to select the product category. The category is used to group products, for example Alcoholic Drinks, Hot Food, Soft Drinks etc. For more information on Categories see Product Categories/Variant Categories
- **Product Calendar.** Select the default product calendar.
- **Coupon Type.** Used for coupon products.

Membership:

- **Is Membership.** Select **No** for stock products.

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.

Cost:

- **Cost Price.** Used for F&B product reporting. The cost price and unit fields are used to carry out conversions for reporting purposes. The cost price is the price paid per unit. The unit is the size of the original purchase. For example for beer it might be barrels, whereas for wine it may be bottles. The Conversion Factor field on the Product Variant form determines how many of the products make up a unit. For example the number of pints in a barrel.
- **Unit.** Used for F&B product reporting. The cost price and unit fields are used to carry out conversions for reporting purposes. The cost price is the price paid per unit. The unit is the size of the original purchase. For example for beer it might be barrels, whereas for wine it may be bottles. The Conversion Factor field on the Product Variant form determines how many of the products make up a unit. For example the number of pints in a barrel.
- **Currency.** Will display the default currency for the instance of Microsoft Dynamics CRM.

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.

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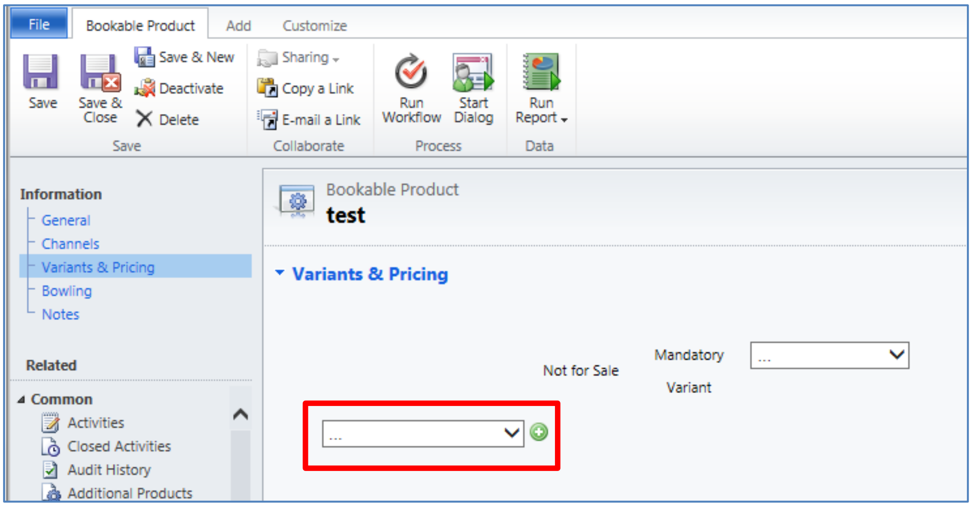
f) Once the details are complete select **Save** on the ribbon.

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

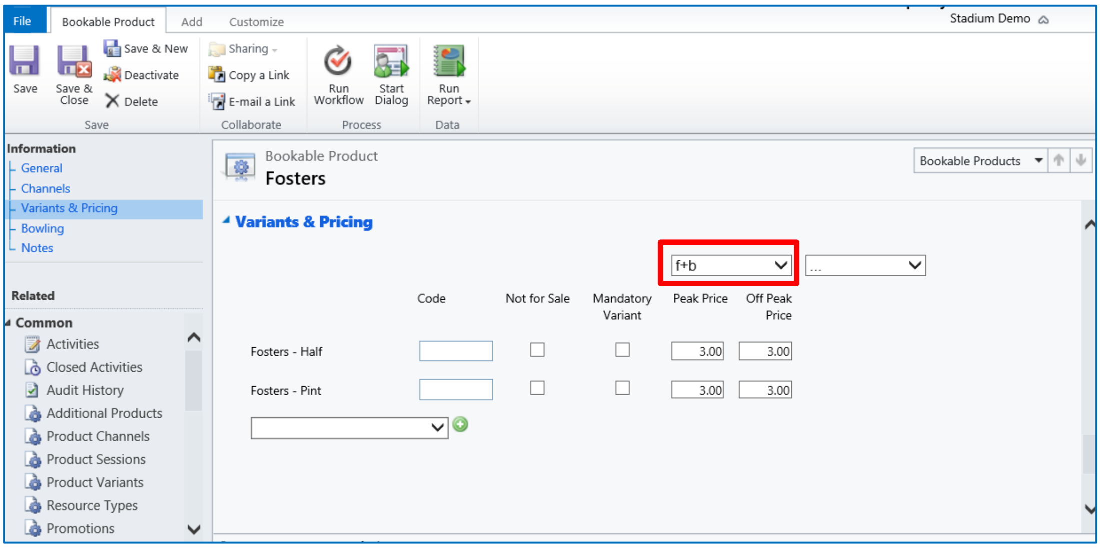
- Select **Channels** in the Form Navigation area.
- The channels that have been set up during the configuration on your system will be listed. Select the checkbox alongside each channel through which the product will be sold, for example Kiosk.
- Select **Save** on the ribbon.

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



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



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

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

6.5. FOOD AND BEVERAGE ON-SALE CHECK LIST

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

Task	Completed?	Comments
Created Variant Types		Create the type of Bookable Product you can purchase. For example a type of drink Bookable Product may have a variant types of a pint and half pint
Created Variant Price Lists		Prices are defined using Variant Price Lists
Created a Channel Price List		The Channel Price List should be linked to the default sales plan The Channel Price List should link the channels to the variant price list on which prices have been entered. Ensure the Channel Price List dates are valid. A channel price list will need to be created for each Variant Price List – Channel combination created.
Create a stock Bookable Product		Ensure the Available Date From and To dates are valid.
Assigned Channels to the Bookable Product		Ensure the relevant channel check boxes are ticked.
Assigned variants to the Bookable Product		Ensure the variants are listed.

Assigned prices to the Bookable Product		Prices should be added to an active Variant Price List that has been linked to a Channel Price List.

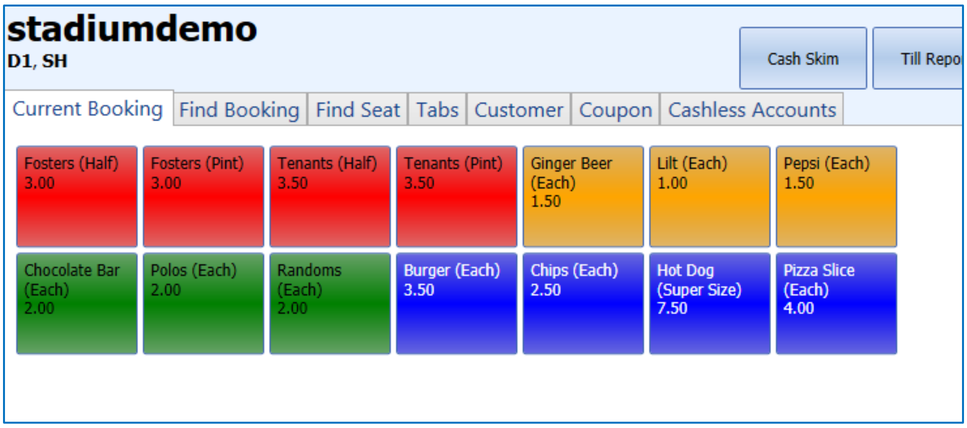
7. PRODUCT CATEGORIES/VARIANT CATEGORIES

The category field on both the bookable product and variant type record is important as it allows products and variant types to be grouped. The categories are also used in the following places:

- Product Variant Editor
- Product Channel Editor
- Variant Price List Editor

Consequently it is essential that a category is set for all bookable products and variant types.

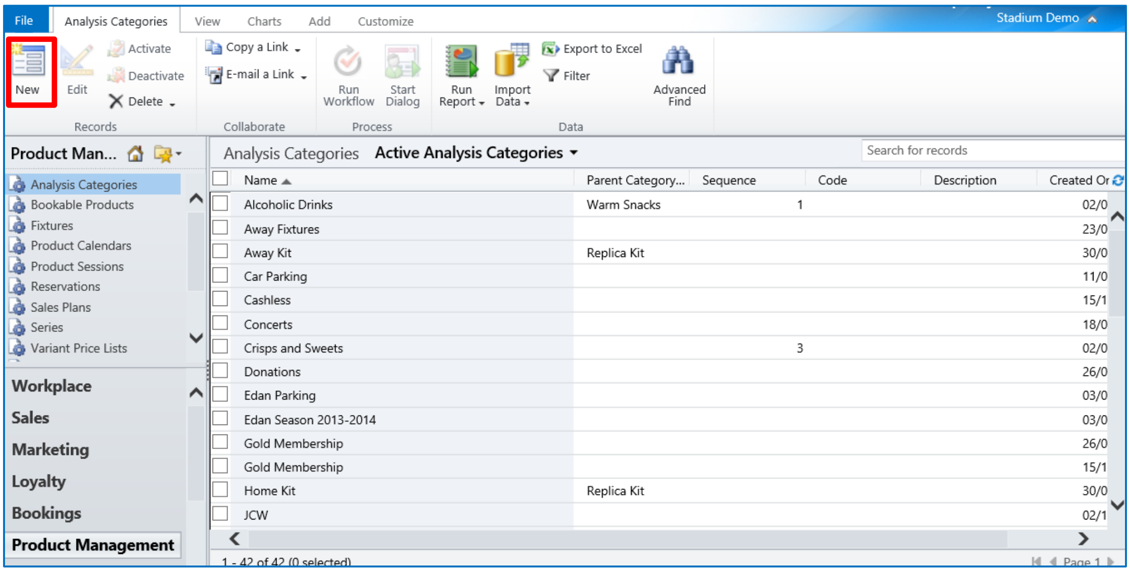
In additional the product category is used to group items in the Kiosk, allowing the colour coding of like-items as shown below:



7.1. CREATING AN ANALYSIS CATEGORY

The Analysis Category and colours are set in the following process:

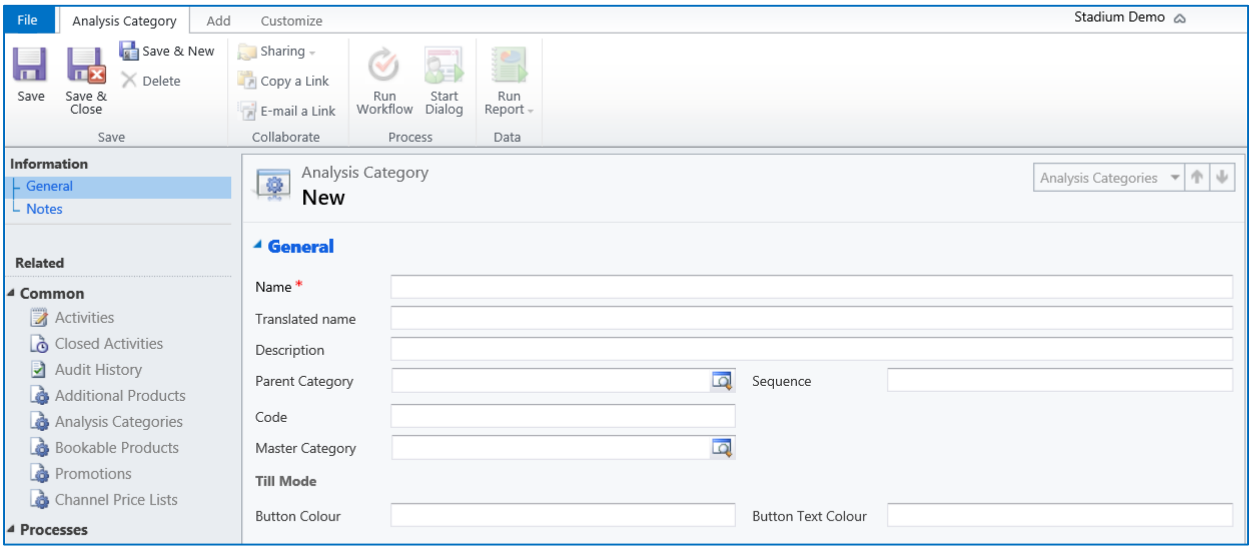
a) Select **Product Management** from the Navigation bar and then select **Analysis Categories.**



b) A list of all current categories that have been created will be displayed, for example Alcholhoic Drinks, Snacks, Warm Snacks etc.

c) Select **New** in the Ribbon. A new Category form will appear

d) Enter the following:



- **Name.** Enter the name of the Category, for example Alcoholic Drinks.
- **Translated Name**. Used for translated implementations.
- **Description.** Enter a description of the category.
- **Parent Category.** If applicable link the category to a parent category.
- **Sequence.** Enter a sequence number for the product. The sequence number is used to determine the order in which categories are displayed.
- **Code.** This field is not required for F&B set up.

- **Master Category.** If applicable, link the category to a Master Category.
- **Button Colour.** Enter the button colour. All Bookable Products within this category will be displayed in the chosen colour in the Channel. Green 4 F&B uses web colours e.g. red, orange, green, etc.
- **Button Text Colour.** Enter the button text colour. Green 4 F&B uses web colours e.g. red, orange, green, etc.

Note: An Analysis Category can be created for each type of product that you are selling. For example, Warm Snacks, Cold Snacks, Alcoholic drinks, Non-Alcoholic drinks etc. These categories can then be linked to the product on the **Bookable Product form** under the field named **Categories** by using the Look Up. For example if there is a bookable product of Fosters, an Alcoholic drinks category can be directly linked to it and this is where all other Alcoholic drinks can be connected to.

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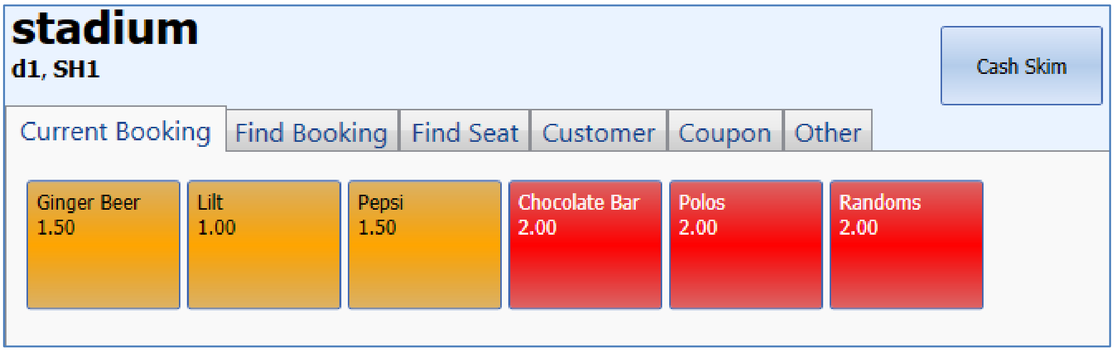
e) Once the details are complete select **Save and Close** on the ribbon.

8. PURCHASING PRODUCTS USING THE KIOSK

To purchase a product using the Green 4 F&B Kiosk:

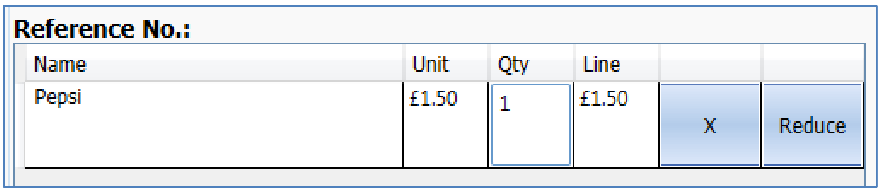
a) Click on the required item listed on the Current Booking tab:



b) The item will be added to the shopping cart.

c) The number of items in the cart can be modified as follows:

- **Increase Number.** Either click the appropriate on the Current Booking tab again, or enter the number required directly into the shopping cart.
- **Decrease Number.** Click **Reduce** alongside the appropriate row in the shopping cart.
- **Remove Item.** Click the **X** button alongside the appropriate row in the shopping cart.



d) Once all the items are listed in the shopping cart select **Add Payment**.

e) If more than one payment method is available, the Payment Method dialog will be displayed. Select the appropriate payment method.

f) The Payment Method dialog will be opened. Enter the payment details before selecting **Pay** to complete the booking.