

CRM DRIVEN SOLUTIONS FOR SPORT & LEISURE

GREEN 4 TICKETING

CRM INFRASTRUCTURE SETUP USER GUIDE



Microsoft Partner
Gold Independent Software Vendor (ISV)

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ABOUT THIS DOCUMENT

This document has been prepared as a User Guide for the setup of Infrastructure to facilitate the use of the Green 4 CRM Modules.

NON-DISCLOSURE

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DOCUMENT CONTROL

Version	Date	Change	Initials
V1.0	03/10/2014	This is a new document	JW/CP

CONTACT

Any correspondence should be addressed to:

Product Development

Green 4 Solutions Limited

16-17 Midland Court

Central Park

Lutterworth

Leicestershire

LE17 4PN

UK

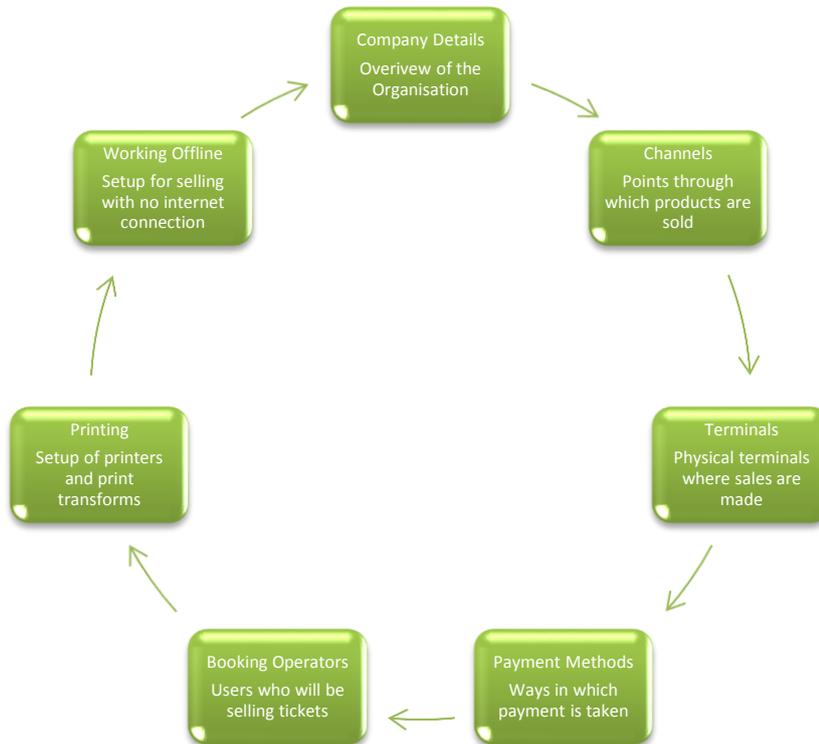
Phone: +44 (0) 845 508 8149

Email: support@green4solutions.com

Web: www.green4solutions.com

1. OVERVIEW

This document provides guidance on how to set-up CRM in order to use Green 4's solutions. The items covered in this document are typically setup once and may only need some amendments over the course of time. The sections covered are outlined in the diagram below.



It must be noted that many of the fields displayed in this Infrastructure Setup User Guide may not have to be completed for your organisation as many are only specifically required for certain functionalities to be enabled. This document gives a broad overview and description of every field displayed in each form. Other Green 4 user guides which explain how to enable specific functionality give precise details on which fields must be completed in the forms that are found in this Infrastructure Setup user Guide.

2. COMPANY DETAILS

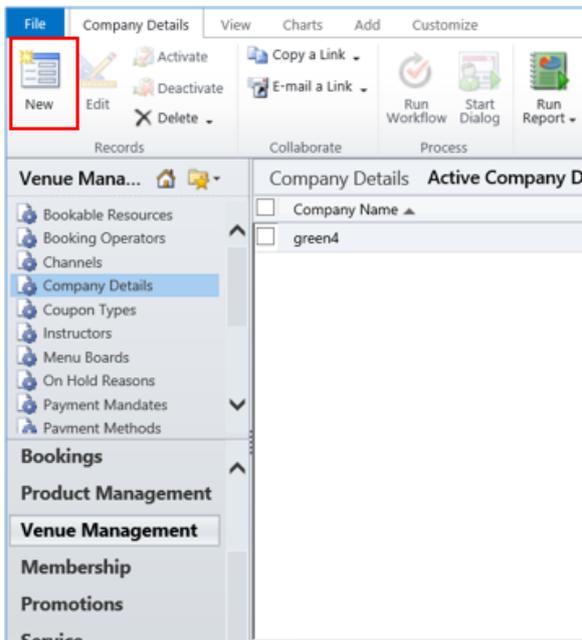
Before starting to use Green 4 Ticketing, you should define your company details. Company details need to be set up once only and for Green 4's solution, only one Company should be captured.

2.1 SETTING UP YOUR COMPANY DETAILS

To set the company details for your organisations in Green 4 Ticketing carry out the following:

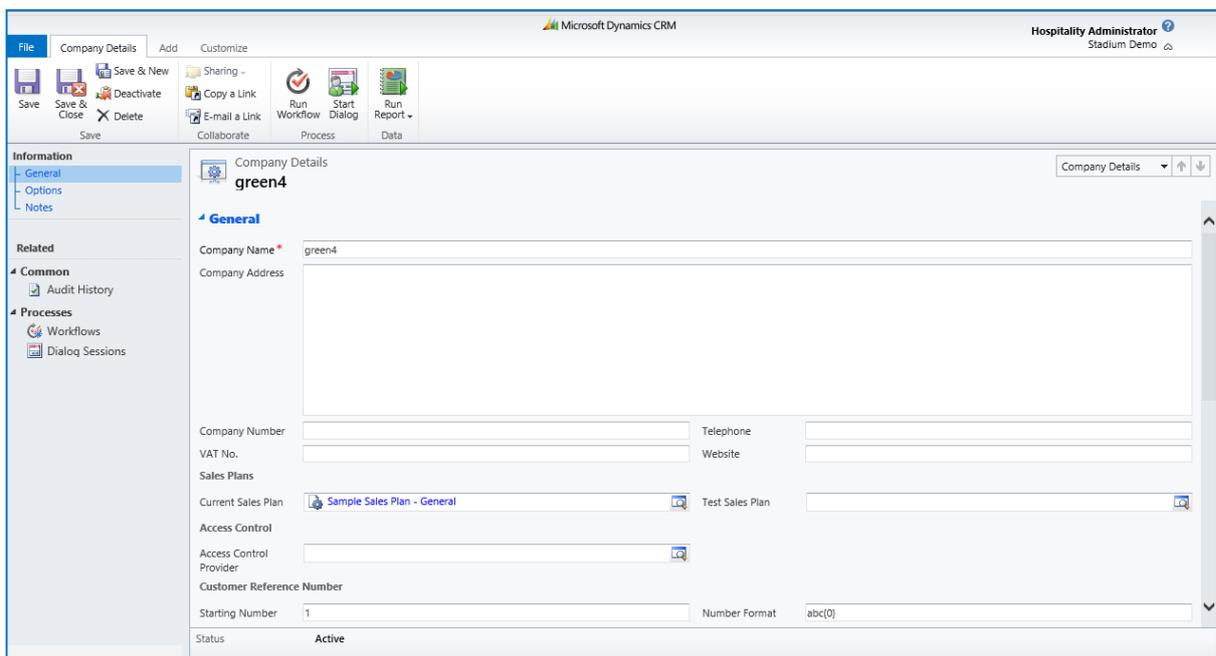
- a) In the CRM **Navigation Panel**, select **Venue Management** followed by **Company Details**.

b) The Company Details view will be displayed:



c) If your organisation's details are not listed, select **New** on the ribbon (highlighted above).

d) A blank Company Details form will be displayed:



e) Complete the following details:



Note. It may not be necessary to complete all the fields as differing Green 4 customers require specific fields to be completed for their required functionality to be enabled. The following gives a broad definition and overview of every field in the Company Details form.

General

- **Company Name.** Enter the full company name.
- **Company Address.** Enter the full company address
- **Company Number.** Enter the company number.
- **Telephone.** Enter the main switch board number for the company.
- **VAT No.** Enter the company's VAT number.
- **Website.** Enter the company's website.
- **Current Sales Plan.** Enter the Sales Plan that you would like to be associated with the Company Details. This is the Sales Plan type 'Other' that will be used in the system, as only one of these can be used.
- **Test Sales Plan.** Enter a test Sales Plan that you would like to be associated with the Company Details. This is the Sales Plan type 'Other' that will be used in the system, as only one of these can be used.
- **Access Control Provider.** Use the Lookup to enter the relevant Access Control provider if applicable.

Customer Reference Number

- **Starting Number.** Enter the number you would like your customer references to start at i.e. 1.
- **Number Format.** Enter the letters required to prefix the customer reference number and the format of the number. Some examples:
 - To generate ABC1, ABC2 etc. – Starting Number = **1** and Number Format = **ABC{0}**
 - To generate CFE0000001, CFE0000002 etc. – Starting Number = **1** and Number Format = **CFE{0:0000000}**
 - To generate G41000, G41001, G41002, etc. – Starting Number = **1000** and Number Format = **G4{0:0000}**

Note: for the number format, the zeros after the ':' represents the total number of digits that will be displayed in the number

Options

- **Use Operator Groups.** If enabled then Booking Operators are allowed to log into the Channels defined by their Operator Group only.
- **Load Bowling UI.** Leave set to **No** for Green 4 Ticketing.
- **Use Coupons.** Select **Yes** if you would like to allow the use of coupons.
- **Display Find Seats Tab.** Select **Yes** to display the Find Seats tab in Green 4 Ticketing.
- **Use Vouchers.** Select **Yes** if you would like to allow the use of vouchers.

- **Booking Details Window Renew Membership.** Not used in Green 4 Ticketing.
- **Allow Offline Mode.** Select **Yes** to allow offline working (see [Allow Offline Working](#) for more details).
- **Contact Mobile Is Required.** Select **Yes** if the contact's mobile number is mandatory when collecting purchaser data.
- **Generate Contact Ext Reference.** Select **Yes** if an external contact reference is to be generated.
- **Sell Fixtures and Series.** Select **Yes** to sell fixtures and series through Green 4 Ticketing.
- **Default Print Option.** Select the default print option from the drop-down list.
- **Ticket Reprint Behaviour.** Select the ticket reprint default behaviour from the drop-down list.



Note. For the Reprint Ticket button to show in the POS, the Default Print Option should be set to **Ticketing** and the Ticket Reprint Behaviour option should be set to **Defaults**.

Shopping Cart Panel Options

- **Display Comment Panel (SCP).** Select **Yes** to show the Comment panel at the top of the shopping cart.
- **Display Seats in Cart Item (SCP).** Select **Yes** to display seat numbers in the shopping cart.
- **Display Product Users Button (SCP).** Select **Yes** to display the Beneficiaries button on the shopping cart.
- **Show Upgrade Button (SCP).** Select **Yes** if the upgrade button is to be displayed alongside the products that have been added to the shopping cart.
- **Disable Print Buttons After Print Success (SCP).** Select **Yes** if the Print buttons are to be disabled once tickets have been successfully printed.
- **Enable Print Button After Full Payment (SCP).** Select **Yes** if the print button is to be enabled once full payment has been received.
- **Display Print Wizard Button (SCP).** Select **Yes** to display the Print Wizard button on the shopping cart.

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

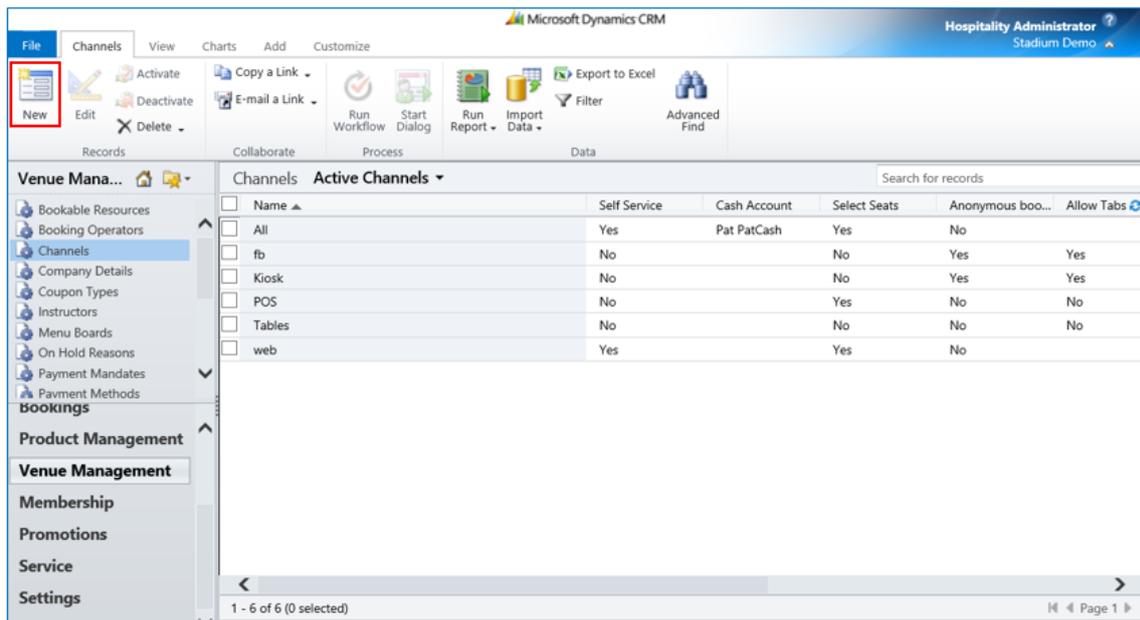
3. CHANNELS

The Channel entity is used to identify the channels through which sales will be made using the Green 4 Ticketing application, for example POS or Web.

3.1 CREATING A CHANNEL

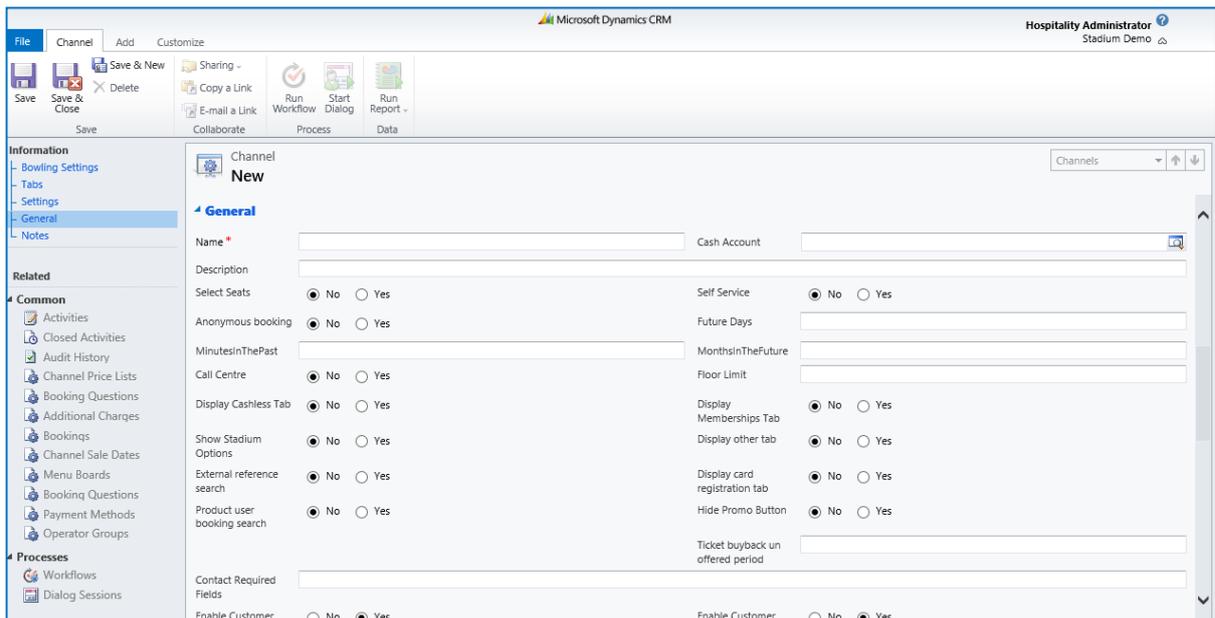
To create a Channel record:

- In the CRM **Navigation Panel** select **Venue Management** followed by **Channels**.
- 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 required fields for the Channel:



Note. It may not be necessary to complete all the fields as differing Green 4 customers require specific fields to be completed for their required functionality to be enabled. The following gives a broad definition and overview of every field in the Channels form.

f)

Bowling Settings (note only required for Bowling sites)

Tabs

- **Allow Tabs.** Select **Yes** if tabs are allowed via the channel (typically used for F&B implementations)
- **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.** Enter any additional settings relating to the channel.
- **Password (Post XML Bookings).** Not used in Green 4 Ticketing.

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. POS or web.
- **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.
- **Description.** Enter a description of the channel.
- **Select Seats.** Select if the user will be able to select seats when using the channel.
- **Self Service.** Select if the channel will be used directly by the shopper (rather than through an employee of your organisation).
- **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 used for match day ticket sales.
- **Future Days.** Enter the number of days before the event the channel can be used to purchase tickets.
- **MinutesInThePast.** Enter the number of minutes after the event has started the channel can be used to purchase tickets.
- **MonthsInTheFuture.** Enter the number of months before the event the channel can be used to purchase tickets.

- **Call Centre.** Select **Yes** if the channel is a call centre channel. When the Call Centre channel is created, the POS will log the user out automatically once a booking has been completed (rather than waiting for the time out period to pass).
- **Floor Limit.** Enter the limit on cashless spending before authorisation must be obtained.
- **Display Cashless Tab.** Select **Yes** to display the Cashless Account tab.
- **Display Memberships Tab.** Select **Yes** to display the Membership tab.
- **Show Stadium Options.** Select **Yes** to show the options for Fixtures and Series on the POS home screen.
- **Display Other tab.** Select **Yes** to display the Other tab.
- **External reference search.** Select **Yes** to have the External reference search displayed in the POS. Note: this is the Customer Reference field.
- **Display card registration tab.** Select **Yes** to have the card registration tab displayed.
- **Product user booking search.** Select **Yes** to have the product user booking search displayed.
- **Hide Promo Button.** Select **Yes** to hide the **Promotion** button in POS/Kiosk. The Discount and Promos button will continue to be displayed.
- **Ticket buyback un offered period.** If the ticket buy back process is set up, enter the period that the buy backs will be allowed.
- **Contact Required Fields.** Enter the fields that are required when a purchaser's information is collected. Fields should be entered in a comma separated list.
- **Enable Customer Editing.** Select **Yes** to allow customers to be edited.
- **Enable Customer Adding.** Select **Yes** to allow new customers to be added.
- **Product User Required Fields.** Enter the fields that are required when a beneficiary's information is collected. Fields should be entered in a comma separated list.
- **Allow Partial Series.** Select **Yes** if customers are able to purchase partial series tickets.
- **Allow Series Seats to be Changed.** Select **Yes** if customers are allowed to move, upgrade or print an individual fixture ticket bought as part of a series.
- **Select Delivery Address.** Select **Yes** if you are using the multiple addresses functionality in Green 4 Ticketing. If this option is selected the address picker dialog will be displayed when the user selects to pay

(after the purchaser details have been entered), allowing the user to pick the address the tickets will be sent to.

- **Display Bookings in Unfulfilled Tab.** Select **Yes** to display the unfulfilled orders tab in the POS. Not used in Green 4 Ticketing.
- **Enable Print at Home.** Select **Yes** if the channel is to have a Print at Home option.
- **Allow Quick Cancel.** Select **Yes** to allow for a booking search to be amended or cancelled.
- **Show Beneficiary Entitled User.** Select **Yes** for the beneficiary window to display entitled users as well as the beneficiary.

Payment Defaults

- **Send Customer Booking Confirmation.** Select **Yes** if you wish for booking confirmations to be automatically sent to customers.
- **Print Receipt.** Select **Yes** if you wish to print a receipt automatically.
- **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 authorisation is required when a refund is issued.
- **Validate Delivery Product.** Select **Yes** if the delivery product needs to be validated. This relates to web bookings only.

Contact

- **Allow Bulk Email.** Select **Yes** to display the Allow Bulk Email question on the Purchaser dialog.
- **Collect Referred from Attribute.** Select **Yes** to display the 'Where did you hear about us?' drop down on the Purchaser dialog.
- **Terms Acceptance Required.** Yes/No. Select Yes if T&C's acceptance is required.
- **Activation Required.** Yes/No. Select Yes if the Contact requires activation.

Behaviours

- **Offer Additional Products.** Select **Yes** if upsell products are to be offered via the channel.
- **Return Stock Levels.** Set to **Yes** if stock levels need to be returned on the POS against the stock product being offered for sale.

- **Do not create stock transactions.** Set to **Yes** if stock transactions must be created when stock products are sold or manual stock transactions are created.

Away Tickets

- **Away Ticket Details to Record.** If away ticket details are to be recorded in the POS and additional fields are required, the following comma (',') separated list needs to be added to this field.

g4b_TicketReferenceNumber,g4b_awayblockid,g4b_row,g4b_seat,g4b_SeatPostfix

- **This will ensure the Away Block** names are contained in a drop down list in the POS and that row and seat fields are available.

Donations

- **Donation Product.** If the Shopping Basket Donation process and a related product have been set up, use the Look Up to select the donation type product that will be offered.
- **Donation Percent.** The percentage captured in this field will calculate the suggested donation amount which will be a percentage of the total booking value. For example, if 20.00 is entered in this field, the suggested shopping basket donation will be calculated as $\text{Booking Value} / 100 * 20\%$. This amount can be changed or cancelled by the end customer.

If this field is left blank, the Shopping Cart Donation process will use the amount entered in the **Default Donation Amount** field that is set up against donation Bookable Product.

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

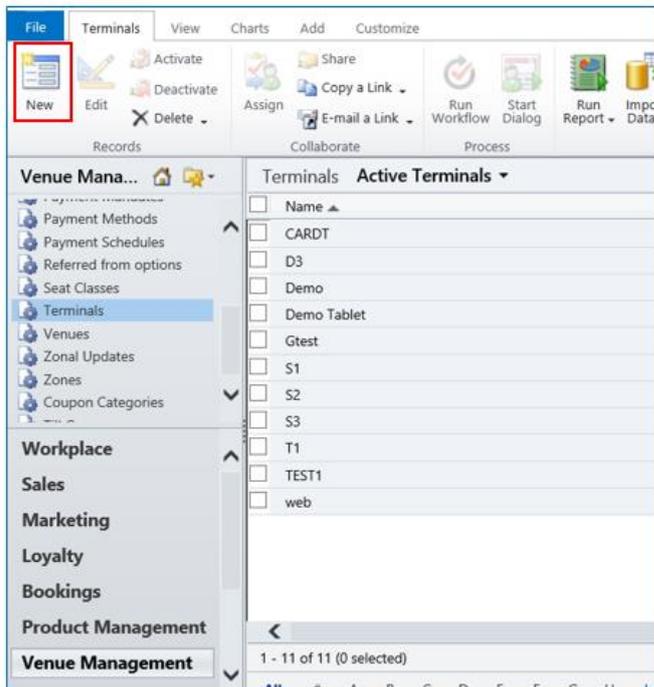
4. TERMINALS

A terminal record must be created for each physical terminal used to sell products through the Green 4 Ticketing system. In addition, if using the internet to sell tickets you must create a terminal record to be used for website sales. Tablets should also be set up as terminals.

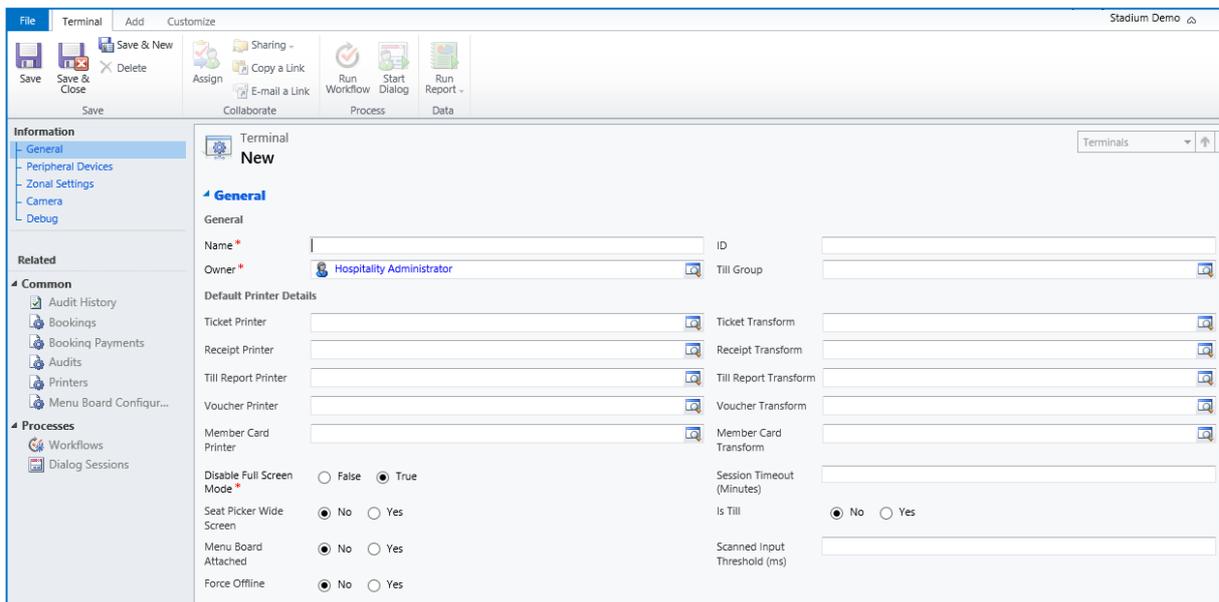
4.1 CREATING A TERMINAL

To create a terminal record:

- In the CRM **Navigation Panel** select **Venue Management** followed by **Terminals**.
- 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:



Note. It may not be necessary to complete all the fields as differing Green 4 customers require specific fields to be completed for their required functionality to be enabled. The following gives a broad definition and overview of every field in the Terminal form.

General

- **Name.** Enter a name for the terminal. The name may be used by other users to identify the terminal within Green 4 Ticketing, 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. This is also recommended for easier management of the terminals.

Default Printer Details

- **Ticket Printer.** Use the Look Up Records dialog to select the printer the terminal will use to print tickets. Leave blank if the terminal is not attached to a suitable ticket printer, for example if defining a terminal for a web site.
- **Ticket Transform.** Use the Look Up Records dialog to select the print transform (template) the terminal will use when printing tickets. Leave blank if the terminal is not attached to a suitable ticket printer, for example if defining a terminal for a web site.
- **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, for example if defining a terminal for a web site.
- **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, for example if defining a terminal for a web site.
- **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, for example if defining a terminal for a web site.
- **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, for example if defining a terminal for a web site.

- **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, for example if defining a terminal web site.
- **Voucher Transform.** Use the Look Up Records dialog to select the print transform (template) the terminal will use when printing vouchers. Leave blank if the terminal is not attached to a suitable ticket printer, for example if defining a terminal for a web site.
- **Member Card Printer.** Use the Look Up Records dialog to select the printer the terminal will use to print members cards. Leave blank if the terminal is not attached to a suitable printer, for example if defining a terminal web site.
- **Member Card Transform.** Use the Look Up Records dialog to select the print transform (template) the terminal will use when printing members cards. Leave blank if the terminal is not attached to a suitable ticket printer, for example if defining a terminal for a web site.
- **Disable Full Screen Mode.** The Green 4 Ticketing 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 Ticketing 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.** Select **Yes** if you want the shopping cart to be hidden when the seat picker screen is displayed. By hiding the shopping cart more space will be available to display the seats available.
- **Is Till.** Select **Yes** if creating a kiosk terminal. Kiosk terminals are used to sell stock products only, and can use a more graphical display of products. The use of the kiosk is covered in greater detail in the Green 4 Food & Beverage guide.
- **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. The use of the menu board is covered in greater detail in the Green 4 Food & Beverage guide.
- **Scanned Input Threshold (ms).** Barcode / Wedge scanner configuration setting.
- **Force Offline.** Select **Yes** to force the terminal into offline mode.
- **Last Synced.** The date the terminal was last synchronised. This will be blank if the terminal is not set up to function offline.

Offline Mode Settings

- **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 (minutes).** Enter the sync interval for offline working.
- **Archive Days.** Enter the number of days' worth of 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.

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 (Note: Utilised by TOBC)

- **Ledger Service Location.** Not used in Green 4 Ticketing.

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 Ticketing.

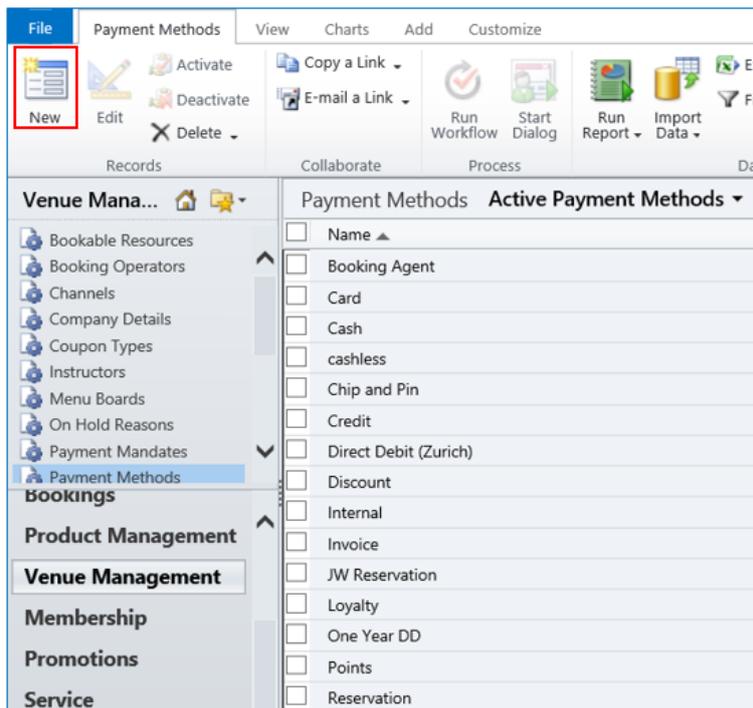
f) Once the details are complete click Save and Close on the ribbon.

5. PAYMENT METHODS

The Payment Methods entity is used to define the payment methods that will be available to customers making purchases via the Green 4 System. For example a payment method would need to be created if using a Card, Cash, Chip and Pin, or Voucher to pay for a product.

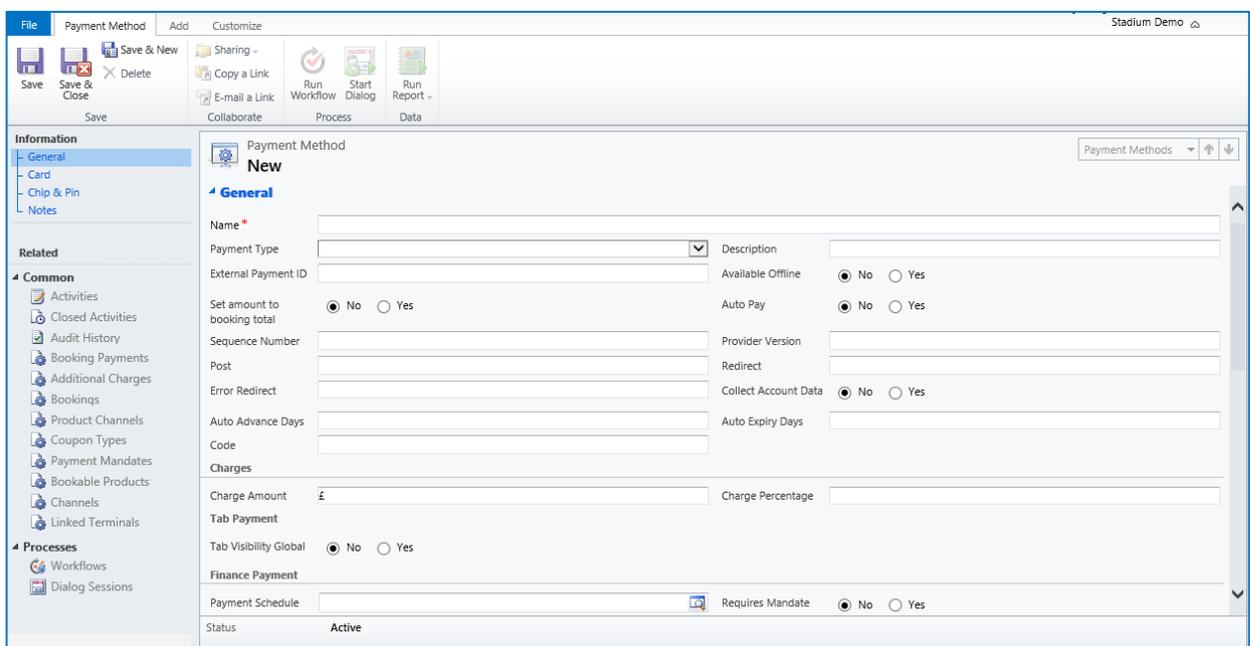
5.1 CREATING A PAYMENT METHOD

- In the CRM **Navigation Panel** select **Venue Management** followed by **Payment Methods**.
- 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:



Note. It is not necessary to complete all the fields as differing Payment Methods require only specific fields to be completed. The following gives a broad definition and overview of every field in the Payment Methods form.

General

- **Name.** Enter a name for the payment type. The name will be displayed on the Channel when the payment is being made.
- **Payment Type.** Use the drop-down list to select the type of payment, e.g. Card, Cash, Chip and Pin. For Direct Debit select Finance.
- **Description.** Enter a short description of the payment method.
- **External Payment ID.** Enter the external id for the payment method.
- **Available Offline.** Select **Yes** if the payment method is to be available offline. See [Allow Offline Working](#) for more details.
- **Set Amount to Booking Total.** Not used in Green 4 Ticketing.
- **Auto Pay.** Not used in Green 4 Ticketing.
- **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.** Select **Yes** if you would like card details to be collected.
- **Auto Advance Days.** For auto payment types, optionally specify the number of days in advance of nominal payment date when the 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 of the shopping basket total 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 tabs are enabled.

Finance Payment (If creating a Direct Debit type Payment Method all of the following fields should be completed)

- **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 (If creating a Card type Payment Method all of the following fields should be completed)

- **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 **Yes** if the payment type is used solely for mail order bookings.
- **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 Number as supplied by the 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 (If creating a Chip and Pin type Payment Method all of the following fields should be completed)

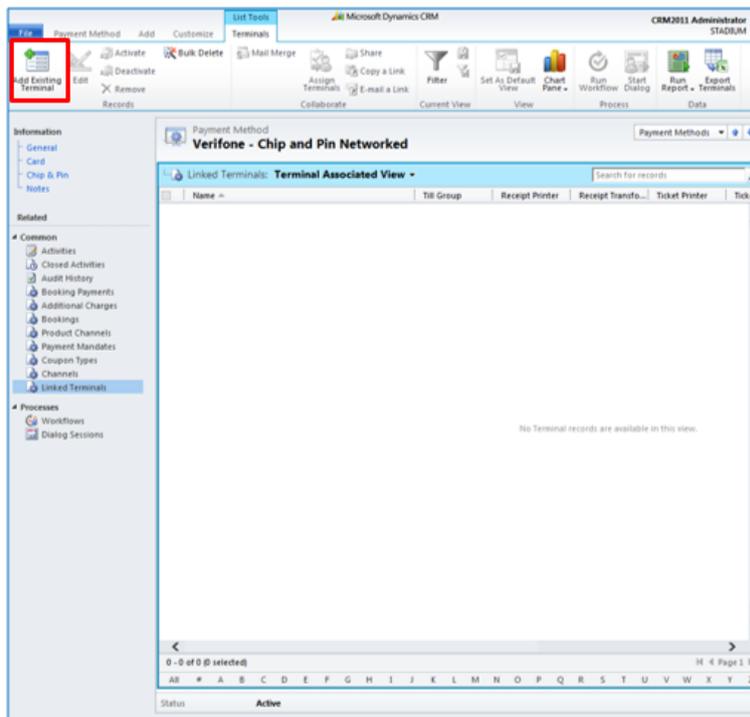
- **Provider.** Enter the name of the chip and pin provider.
- **Account Name.** Enter your organisation's Account Name as provided by the chip and pin provider.
- **Account No.** Enter your organisation's Account Number as provided by the chip and pin provider.
- **Host.** Payment provider specific 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.** 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.

5.2 LINKED TERMINALS

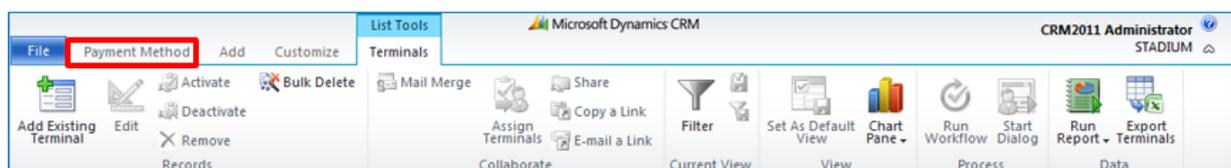
If the terminal is linked to a remote PDQ machine, a payment method will need to be set up for each PDQ machine and linked to the relevant payment method of the PDQ machine. To link a terminal to a payment method:

- a) With the Payment Method open in the Payment Method form, select **Linked Terminals** in the Form Navigation Panel.



The Linked Terminals list view will be displayed:

- b) Select **Add Existing Terminal** to continue.
- c) Select **Terminal to be linked to Payment Method**.
- d) Select **Add** and **OK** to confirm.
- e) Select Payment Method heading.

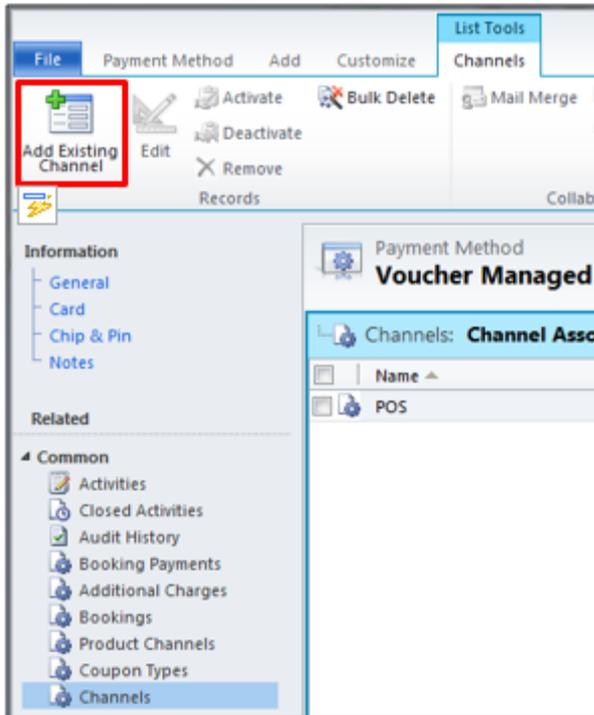


- f) Once the details are complete select **Save** on the toolbar.

5.3 PAYMENT METHOD CHANNEL

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 **POS** 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.

5.4. EPOS AND PDQ TERMINAL

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

- a) Select **Verifone – Chip and Pin Networked** on the Payment Method screen.
- b) The payment method dialog will be displayed:

Verifone - Chip and Pin Networked

Booking Total:£	10.00
Promotion Value:£	0.00
Amount Paid:£	0.00
Balance to Pay:£	10.00
Payment Charge:£	0.00
Total for Full Payment:£	10.00

Amount Tendered:£

Repeat (0.00) Split TOTAL £20 £10 £5

This Payment:£ **0.00**

Customer Details:
()

Process Card Payment

Authentication Code

Send Confirmation Email to Customer. Print Receipt
 Send Confirmation Email to Operator.

Pay Exit

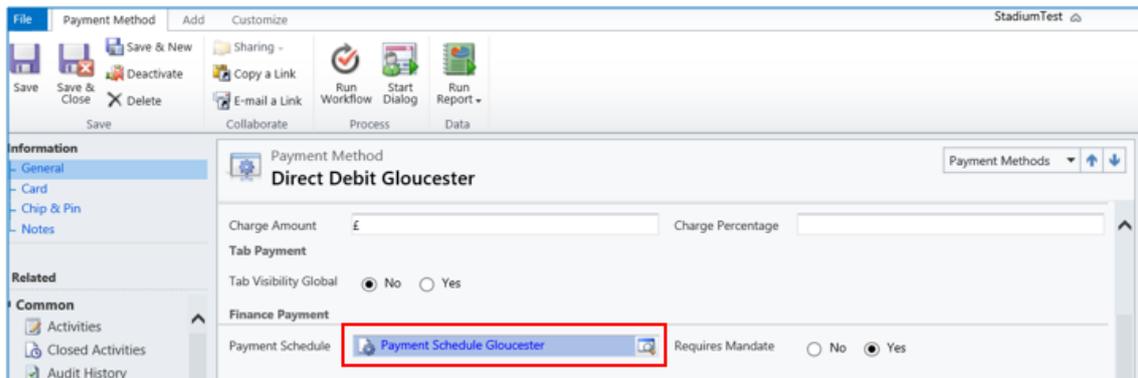
- c) Enter the amount tendered by the customer by either typing the amount directly into the **Amount Tendered** text box, or using the buttons available:
- **Total.** Select if the customer has tendered the total amount left to pay.
 - **£20.** Select to add £20 to the amount tendered.
 - **£10.** Select to add £10 to the amount tendered.
 - **£5.** Select to add £5 to the amount tendered.
- d) Select **Process Card Payment** and use the associated Chip and Pin machine to process the payment.
- e) Once processed, the **Card Authorisation Code** is added by the system to the **Booking Payment**.

6. DIRECT DEBIT

To create a Direct Debit it must be added as a new Payment Method that is available for use via the POS or Web. A Direct Debit Payment Method can be created by following the [Creating a Payment Method](#) section of this manual.

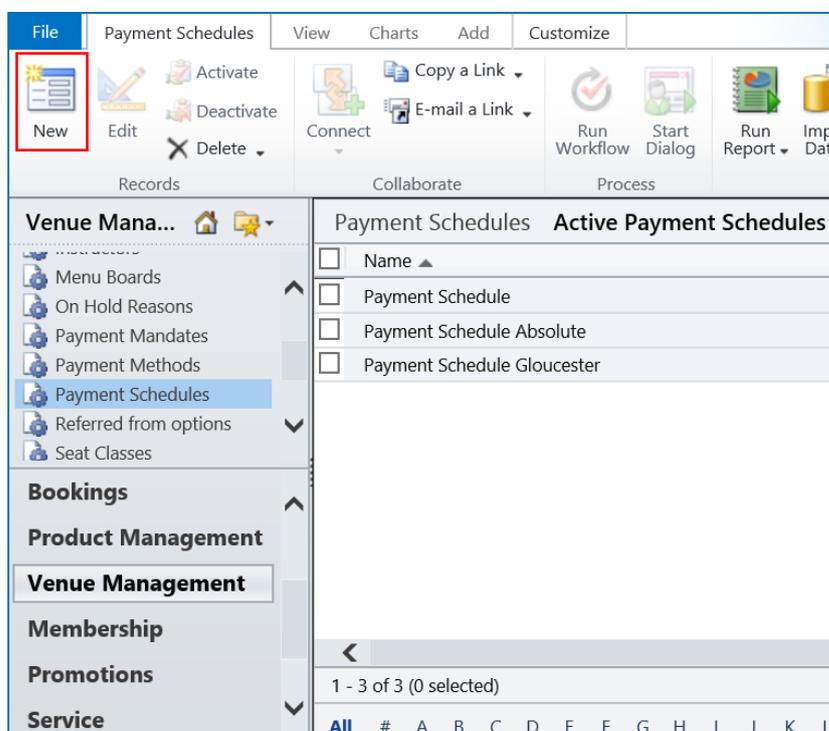
6.1 CREATING A PAYMENT SCHEDULE

Within the Payment Method form a key field relevant to Direct Debits needs to be completed; this being the Payment Schedule, as shown below. The Payment Schedule highlights when each payment for the Direct Debit is to be paid.

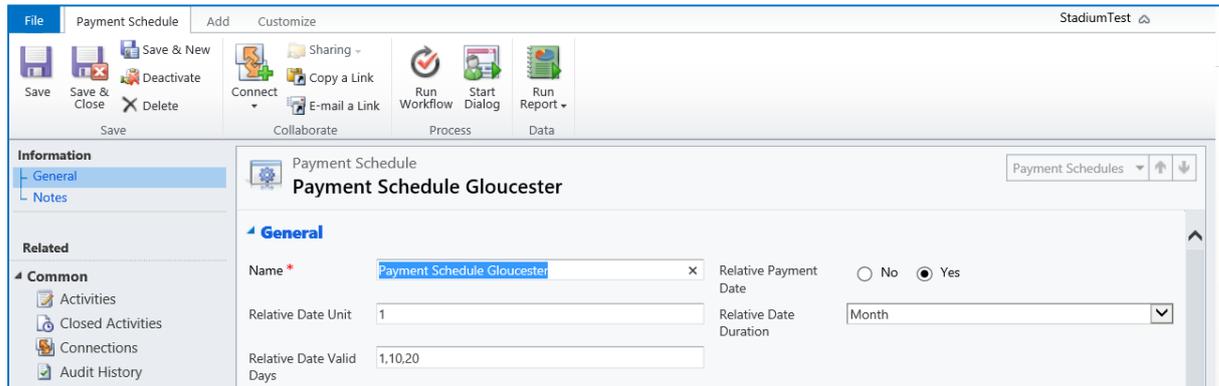


To set up a Payment Schedule:

- Select **Venue Management** in the Navigation bar followed by **Payment Schedules**.
- Select **New** on the ribbon.



c) A Payment Schedule form will be displayed.



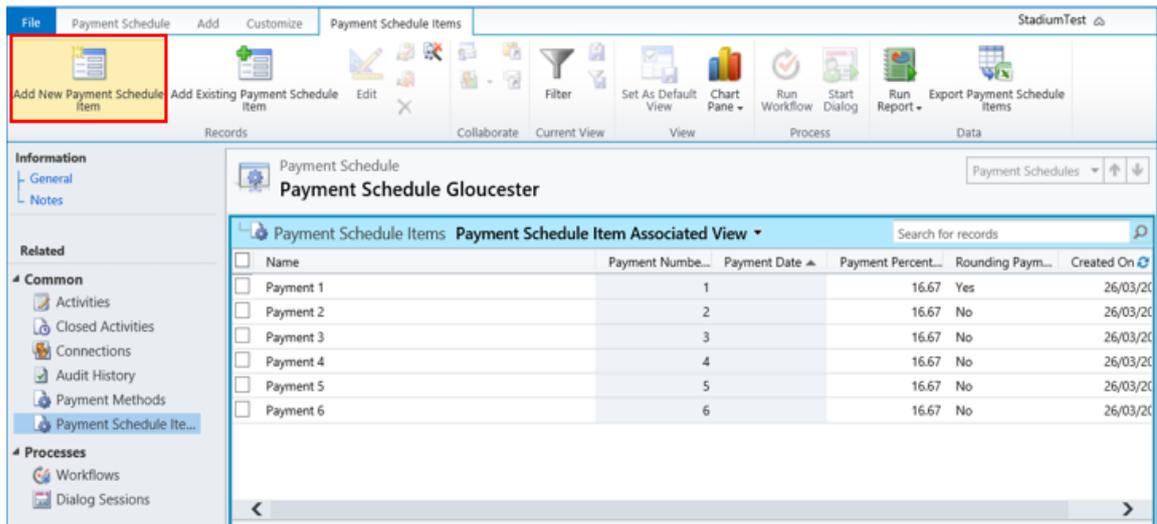
d) Complete the following Fields:

- **Name.** Enter the name of the Payment Schedule
- **Relative Payment Date.** Select **Yes** if you would like your payment date to be relative. Select **No** if you would like your payment dates to be absolute.
- **Relative Date Unit.** Only enter if you have selected **Yes** as your Relative Payment Date.
- **Relative Date Duration.** Only enter if you have selected **Yes** as your Relative Payment Date. From the drop down list select on what basis the payment will be taken.
- **Relative Date Valid Days.** Only enter if you have selected **Yes** as your Relative Payment Date. Enter with the use of a comma separating the numbers the days valid for payment to be taken. i.e. 5,20 if monthly payments are defined to be collected on the 5th or 20th of the month.
- **Description.** Enter a description of the Payment Schedule.

e) Select **Save** on the ribbon

6.2 ADDING PAYMENT SCHEDULE ITEMS

a) Next, Payment Schedule Items must be added. With the for Payment Schedule form still open select **Payment Schedule Item** in the Navigation area. A payment schedule item is each of the payments that need to be made to make up the direct debit, therefore they are worth a certain percentage of the overall product purchased via Direct Debit.



b) Select **Add New Payment Schedule Item** in the ribbon.

The screenshot shows the 'Payment Schedule Item' form for 'Payment 1'. The 'General' tab is active, and the following fields are visible:

- Name ***: Payment 1
- Payment Number ***: 1
- Payment Date**: (empty)
- Payment Percent of Total**: 16.67
- Rounding Payment**: No Yes

c) Complete the following:

- **Name.** Enter the name of the payment, i.e. Payment 1.
- **Payment Number.** Enter the number which this payment is.
- **Payment Date.** Enter the date that the payment is to be made. If a relative payment schedule is being used a date does not need to be entered.
- **Payment Percent of Total.** Enter the percent of the overall payment that you would like this payment to be worth.
- **Rounding Payment.** Select **Yes** if you would like the Payment to be rounded.

d) Select **Save and Close** on the ribbon, repeat this process until you have created enough Payment Schedule items for the overall cost of the product to be paid for.

e) Upon completion select **General** in the Navigation area. This will display the Payment Schedule form. **Select Save and Close.** The Payment Schedule is now ready to be added to the appropriate field in the Payment Methods form.



Note. For a Direct Debit or any other payment method to work, a Bookable Product and Channel must be assigned to the payment method.

6.3 MANAGING DIRECT DEBIT PAYMENTS IN POS

When direct debit has been added as a new payment method available for use via the POS, you will be able to select this option when taking payment from the customer providing ALL items in the shopping cart have been marked as eligible for payment by direct debit.

To process a direct debit payment, carry out the following:

- a) Select the **direct debit** payment method on the **Payment Method** dialog.
- b) The Direct Debit screen will be displayed:

Finance

Booking Total:£ 199.95
 Promotion Value:£ 0.00
 Amount Paid:£ 0.00
 Balance to Pay:£ 199.95
 Payment Charge:£ 0.00
 Total for Full Payment:£ 199.95

Customer Details:
Martha Jones (marthajones@test.com)
 104 Barwell Road, Earl Shilton, Leicester, West Midlands

Scheduled Payments

Payment No.	Payment Date	Payment Amount
1	25/03/2014	£39.99
2	25/04/2014	£31.99
3	25/05/2014	£31.99
4	25/06/2014	£31.99
5	25/07/2014	£31.99
6	25/08/2014	£32.00

Payment Mandate Details

Bank Name Account Name
 Sort Code Account Number

Send Confirmation Email to Customer.
 Send Confirmation Email to Operator

Print Receipt

- c) The screen will display the following information:
 - The amount payable
 - The payment schedule
 - Details of any previously entered Payment Mandates
- d) If a payment mandate does not exist, complete the following details at the bottom of the dialog:
 - Bank Name.
 - Sort Code.
 - Account Name
 - Account Number

- e) If a payment mandate already exists, select the details in the list shown. Once a mandate is selected the account details at the bottom of the screen will become populated:

Finance

Booking Total:£	99.95
Promotion Value:£	0.00
Amount Paid:£	0.00
Balance to Pay:£	99.95
Payment Charge:£	0.00
Total for Full Payment:£	99.95

Customer Details:
Martha Jones (marthajones@test.com)
 104 Barwell Road, Earl Shilton, Leicester, West Midlands

Scheduled Payments

Payment No.	Payment Date	Payment Amount
1	25/03/2014	£19.99
2	25/04/2014	£15.99
3	25/05/2014	£15.99
4	25/06/2014	£15.99
5	25/07/2014	£15.99
6	25/08/2014	£16.00

Payment Mandate Details

Mandate - Martha Jones [200023]

Bank Name: Test Account Name: M Jones
 Sort Code: 11-11-11 Account Number: 12345678

Send Confirmation Email to Customer. Print Receipt
 Send Confirmation Email to Narrator

- f) When the bank details fields are pre-populated with the details of an existing mandate, click **New Mandate** to clear the details, allowing the entry of a new mandate.
- g) Once the appropriate mandate details have been selected or entered, click **Pay** to complete the payment.
- h) The shopping cart will be redisplayed. The booking will have a status of reserved.

Customer
Martha Jones (marthajones@test.com)
 104 Barwell Road, Earl Shilton, Leicester, West...

Reference No.:1030119

Name	Seats	Unit	Qty	Line	
Standard season ticket (Adult) Season 2013 - 2014 East 2	8 3	£199.95	1	£199.95	X

Discount And Promos

Total Price	£199.95	<input type="button" value="Add Comment"/>	<input type="button" value="Print Wizard"/>	<input type="button" value="Promotion"/>
Finance Payment	£0.00	<input type="button" value="Close"/>	<input type="button" value="Print Tickets"/>	<input type="button" value="Add Payment"/>
Total to pay	£199.95			

6.4 MANAGING DIRECT DEBIT PAYMENTS ON THE WEB

When direct debit has been added as a new payment method available for use via the web, the customer will be able to select this option when making a payment providing ALL items in the shopping cart have been marked as eligible for payment by direct debit.

The following describes the actions the customer will need to follow to pay by direct debit via the web:

- a) On the payment page a new option of **Pay by Direct Debit** will be displayed if the products in the cart are eligible for this method of payment. Click this option to continue.

CARD PAYMENT

Description	Date and Time	Seats	Type	Unit	Qty	Price
Standard season ticket Season 2014 - 2015 East 1		A 14	Adult	£220.00	1	£220.00
Total						£220.00

If your booking is incorrect please [click here](#) to change it.

Your details

Mr Adam Smith (adam@green4solutions.com)

Telephone Number: 1234
Mobile Number: 0123456789

If your personal details are incorrect please **update them**.

Pay by direct debit

Card details

Card Number

Name on Card

Start Date Month Year

Expiry Date Month Year

Issue Number

Security Code

Complete Booking
Back

- b) The Direct Debit page will be displayed:

DIRECT DEBIT PAYMENT

Payment No.	Payment Date	Payment Amount
1	15/03/2014	£44.00
2	14/04/2014	£35.20
3	14/05/2014	£35.20
4	14/06/2014	£35.20
5	14/07/2014	£35.20
6	14/08/2014	£35.20

Please select an existing mandate or enter your details below:

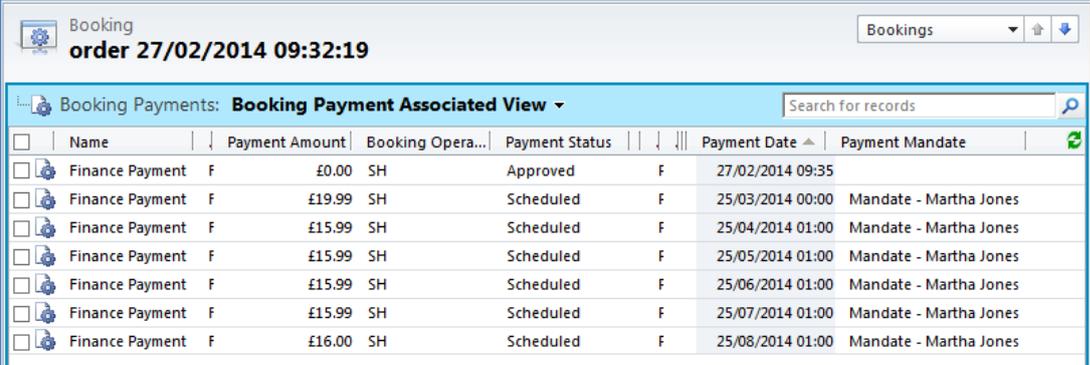
Bank Name
 Sort Code
 Account Name
 Account Number

All normal Direct Debit safeguards and guarantees apply. No changes in the amount, date or frequency to be debited can be made without notifying you at least 10 working days in advance of your account being debited. In the event of any error, you are entitled to an immediate refund from your Bank or Building Society. You have the right to cancel a Direct Debit Instruction at any time simply by writing to your Bank or Building Society, with a copy to us.

- c) The screen will display details of the payment schedule and options to view previously entered payment mandates.
- d) Two options are available:
- **Create a new mandate.** To create a new mandate, enter the bank details in the appropriate boxes. If the fields are pre-filled, click **Clear** to allow you to enter new details.
 - **Use an existing mandate.** To use an existing mandate click on the appropriate mandate button. The bank details will populate the appropriate fields.
- e) Once the bank details are complete select **Complete Booking**.

6.5 VIEWING BOOKINGS IN CRM

When a booking that has been paid for by direct debit is viewed in CRM, under **Booking Payments** all of the scheduled payments will be listed. As each payment is taken, the payment status will update to **Approved**.



The screenshot shows a CRM interface for viewing booking payments. At the top, it displays 'Booking order 27/02/2014 09:32:19'. Below this is a section titled 'Booking Payments: Booking Payment Associated View' with a search bar. The main content is a table with the following columns: Name, Payment Amount, Booking Opera..., Payment Status, Payment Date, and Payment Mandate. The table contains seven rows of payment records.

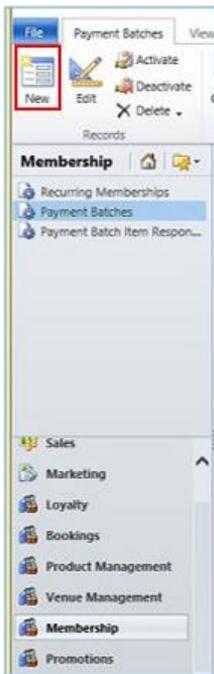
<input type="checkbox"/>	Name	Payment Amount	Booking Opera...	Payment Status	Payment Date	Payment Mandate
<input type="checkbox"/>	Finance Payment	F £0.00	SH	Approved	F 27/02/2014 09:35	
<input type="checkbox"/>	Finance Payment	F £19.99	SH	Scheduled	F 25/03/2014 00:00	Mandate - Martha Jones
<input type="checkbox"/>	Finance Payment	F £15.99	SH	Scheduled	F 25/04/2014 01:00	Mandate - Martha Jones
<input type="checkbox"/>	Finance Payment	F £15.99	SH	Scheduled	F 25/05/2014 01:00	Mandate - Martha Jones
<input type="checkbox"/>	Finance Payment	F £15.99	SH	Scheduled	F 25/06/2014 01:00	Mandate - Martha Jones
<input type="checkbox"/>	Finance Payment	F £15.99	SH	Scheduled	F 25/07/2014 01:00	Mandate - Martha Jones
<input type="checkbox"/>	Finance Payment	F £16.00	SH	Scheduled	F 25/08/2014 01:00	Mandate - Martha Jones

6.6 SUBMITTING PAYMENT REQUEST TO LONDON ZURICH

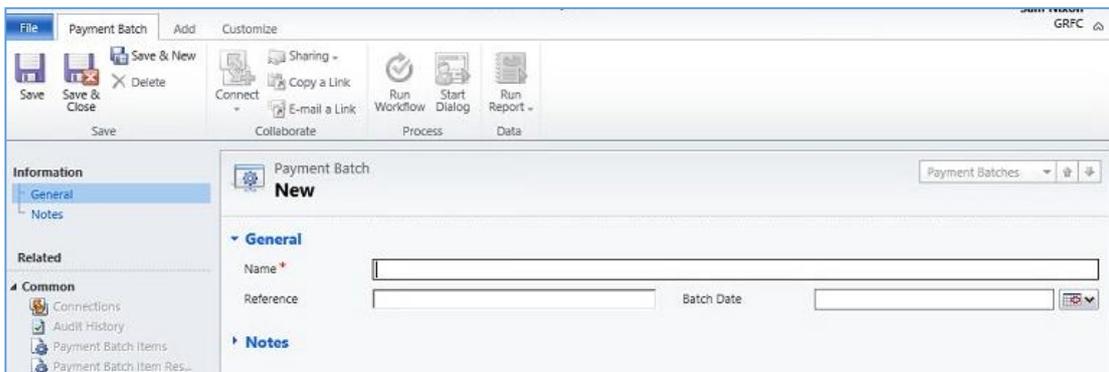
The request for payment should be sent to London Zurich monthly. The request should be sent between 5 and 7 working days before the payment is due for collection. Failure to send the request during this timeframe will result in the request failing. Consequently payments will not be collected by London Zurich and it will be necessary to process the payment using an alternative method. In the event of missing the payment request date, please contact Green 4 Support immediately for advice on how to proceed. This work will incur a charge from Green 4 Solutions.

To request payment from London Zurich carry out the following 5-7 working days ahead of the due date for direct debit payments:

- a) In CRM, select the **Membership** tab on the **Navigation** panel.
- b) Select **Payment Batches**. A list of existing payment batches will be displayed.



- c) Select **New** on the ribbon.
- d) A blank Payment Batch record will be displayed. Enter a name for the payment batch e.g. Payment Batch (dd.mm.yy) before selecting **Save** on the ribbon.

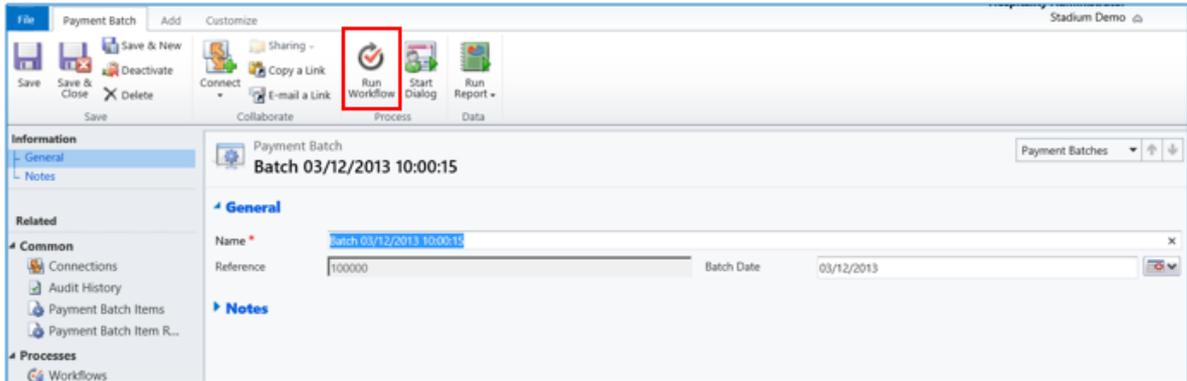


- e) The **Reference** and **Batch Date** fields will be automatically filled in.
- f) When a new batch is created, the system will automatically generate any batch items that are due for payment. To be included in the batch, a booking payment must fulfil the following criteria:
 - a. **Payment Status** = Scheduled
 - b. **Payment Date** = Due in the next 5-7 working days
 - c. **Booking Status** = The booking to which the payment is linked must have a status of reserved.
 - d. **Payment Mandate** = The payment mandate linked to the payment must have a status of Active.
- g) To view the batch items that have been created, with the Batch open in the form view, select **Payment Batch Items** in the form navigation panel. A list of items will be displayed:

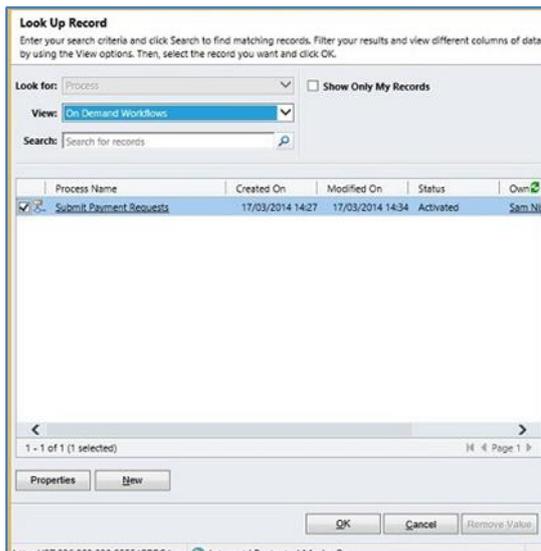
- h) The list can be refreshed to show new items using the refresh button in the top right hand corner of the view (highlighted above). Once the items count at the bottom of the view (highlighted above) stops increasing you are ready to progress onto the next stage: submitting the requests to London Zurich.

To send the batch details to London Zurich carry out the following:

- i) With the batch details open in the form view, select **Run Workflow** on the ribbon.



- j) The Lookup Records dialog will be displayed. Select **Submit Payment Requests** from the list of items listed before clicking **OK** to continue.



- k) A confirmation dialog will be displayed. Click **Yes** to confirm your actions.
- l) Once the workflow has completed (this may take a few minutes) the status of the payment batch items will be updated to **Processed** and each item will have a unique **Collection Reference**.

Name	Processed Payment	Collection Reference	Date Processed
Payment Batch Item	Yes	2035139	24/03/2014
Payment Batch Item	Yes	2035140	24/03/2014
Payment Batch Item	Yes	2035141	24/03/2014
Payment Batch Item	Yes	2035142	24/03/2014
Payment Batch Item	Yes	2035143	24/03/2014
Payment Batch Item	Yes	2035144	24/03/2014



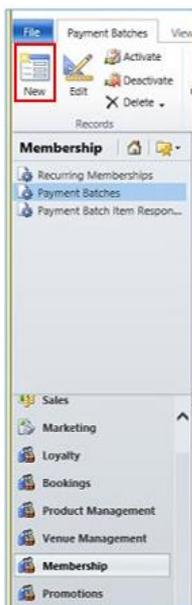
Note. The customer’s booking cannot be edited whilst the payments are being processed. Therefore the booking should not be changed once the batch has been generated until confirmation of payment success has been received from London Zurich

6.7 COLLECTING PAYMENT RESPONSES

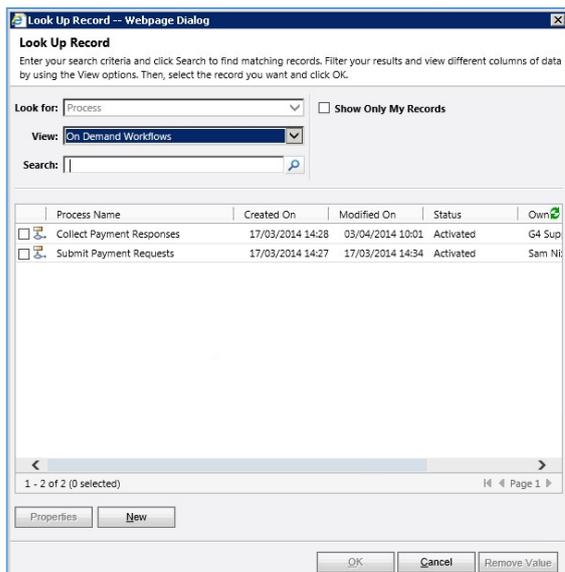
The payment responses should be requested from London Zurich, 3 or more working days after the date payments were due to be collected. If you have more than one payment batch submitted to London Zurich, you must wait until 3 working days after the last payment date.

To request payment responses from London Zurich carry out the following 3 or more working days after the payment date for direct debits:

- a) In CRM, select the **Membership** tab on the **Navigation** panel.
- b) Select **Payment Batches**. A list of existing payment batches will be displayed.



- c) Open the batch of interest in the form view.
- d) Select **Run Workflow** on the ribbon.
- e) The Lookup Records dialog will be displayed. Select **Collect Payment Responses** from the list of available workflows. Click **OK** to continue.



- f) A confirmation dialog will be displayed. Click Yes to confirm your actions.
- g) The workflow will import the payment batch item responses and link these to the batch (to view select Payment Batch Item Responses in the related area of the Payment Batch form).
- h) The Outcome of the response will be as follows:
 - **H = Payment collect succeeded.** In this instance the linked booking payment will have a status of **Approved**.
 - **F = Payment collection failed.** In this instance the linked booking payment will have a status of **Rejected**. See details of how to manage the failed payments below.

6.8 MANAGING FAILED PAYMENTS

If a payment batch item response is returned as failed (F), it will be necessary to contact the customer linked to the payment and arrange to collect the payment by another method, for example credit card. The following details how to investigate the failure and subsequently amend the booking using the POS.

STEP 1: IDENTIFY THE PAYMENT AND BOOKING IN CRM

- a) In CRM, open the relevant Payment Batch. Select **Payment Batch Item Responses** in the form navigation area.
- b) Identify a response where the **Outcome** is set to **F**.
- c) Click on the entry in the **Payment Batch Item** column.

The screenshot shows the 'Payment Batch' form for 'Payments (24.03.14)'. The 'Payment Batch Item Responses' table is displayed with the following data:

Name	Payment Batch Item	Billing File	Booking Payment	Processed	Payment Referen...	Outcome
Payment Batch Item R...	Payment Batch Item	9810-CABilling-123061£	Yes	Yes		F
Payment Batch Item R...	Payment Batch Item	9810-CABilling-123061£	Yes	Yes		F
Payment Batch Item R...	Payment Batch Item	9810-CABilling-123061£	Yes	Yes		F
Payment Batch Item R...	Payment Batch Item	9810-CABilling-123061£	Yes	Yes		F
Payment Batch Item R...	Payment Batch Item	9810-CABilling-123061£	Yes	Yes		H

d) The Payment Batch Item form will be displayed.

The screenshot shows the 'Payment Batch Item' form. The 'General' section contains the following fields:

- Name: Payment Batch Item
- Booking Payment: [Empty]
- Payment Batch: Payments (24.03.14)
- Amount: £ 79.80
- Processed Payment Request: No Yes
- Payment Mandate: Mandate - Ian Shimell
- Collection Reference: 2014626
- Contact: Ian Shimell
- Payment Success: No Yes

e) Click on the blue text in the **Payment Mandate** field. The Payment Mandate linked to the payment will be opened in the form view.

The screenshot shows the 'Payment Mandate' form for 'Mandate - Ian Shimell'. The 'General' section contains the following fields:

- Name: Mandate - Ian Shimell
- Reference: 57
- Start Date: [Empty]
- Payment Method: Monthly Payments
- Collect Deposit with First Payment: No Yes
- Collect Credit Account Balance: No Yes
- Number of Payments: [Empty]
- External Reference: 1000067
- Mandate Status: Active
- Contact: Ian Shimell
- Bank Details**
 - Bank Name: Nationwide
 - Account Name: Mr I Shimell
 - Sort Code: 07-01-16
 - Account Number: 46465732

f) Make a note of the entry in the **External Reference** field.

g) Change the status of the **Mandate** to **Inactive**.

h) Select **Save** to save the changes made but leave the form open.

i) Next, select **Booking Payments** in the related area. A list of booking payments linked to the mandate will be displayed. Open the payment that has been rejected.

j) The Booking Payment will be displayed in the form view.

The screenshot shows a 'Booking Payment' form for a 'Monthly Payments Payment'. The 'Booking' field is highlighted with a blue link: [order 05/03/2014 13:54:07](#). Other fields include Payment Method (Monthly Payments), Payment Amount (£ 79.80), Payment Date (24/03/2014), Payment Status (Rejected), Booking Operator (Elaine), and Terminal (TOS).

- k) Click on the blue text in the **Booking** field. The Booking linked to the payment will be opened in the form view.

This screenshot is identical to the previous one, showing the 'Booking Payment' form with the 'Booking' field containing the blue link [order 05/03/2014 13:54:07](#).

- l) Make a note of the entry in the **Booking Reference** field.

STEP 2: INVESTIGATE THE PAYMENT USING THE LONDON ZURICH SITE

- Log into the London Zurich administration site.
- Select to view reports.
- Enter the group reference and external reference (for the payment – identified in step 1).

The screenshot shows the 'Reports' page. On the left, there is a search box with the text '9810:1000067'. Below the search box are three options: 'Search for exact Account Number', 'Search for partial Account Number', and 'Search for Account Name'. On the right, there are sections for 'Financial Reports' and 'Account Names in this Group', each with several links to reports and account lists.

- Select **Search for exact Account Number**.
- The account details will be displayed. Select **View Last 100 Comments for this Account** at the bottom of the page.

Mobile	<input type="text"/>	Credit Limit* (£)	<input type="text" value="0.00"/>
New Comment (opt)	<input type="text"/>	Additional information (optional)	
Comment is optional and is added to account record		Fax	<input type="text"/>
ACCOUNT IS ENDED. Click here to RE-INSTATE this account view the last 100 comments for this Account view ALL transactions (including Failed Collections) view INVOICED transactions only view NON-INVOICED transactions only		Company Number	<input type="text"/>

f) A list of comments, including details of the failure reason will be displayed:

Comments for Account 9810:1000067	
There has only been 5 Comment(s):	
Date	Comment
25-Mar-14 07:05	Account Auto End-Dated DDR, Reason: Refer To Payer, Instruction Cancelled
25-Mar-14 07:05	LinkLine reports Failed Collection (reason= 0) of £79.80 [Account Ended]
17-Mar-14 16:14	CA Added, Single Collection 24-Mar-14 for £79.80
06-Mar-14 09:32	Auddis action create processed
05-Mar-14 13:52	[ESERV AutoAdded]
Back to Account Details	

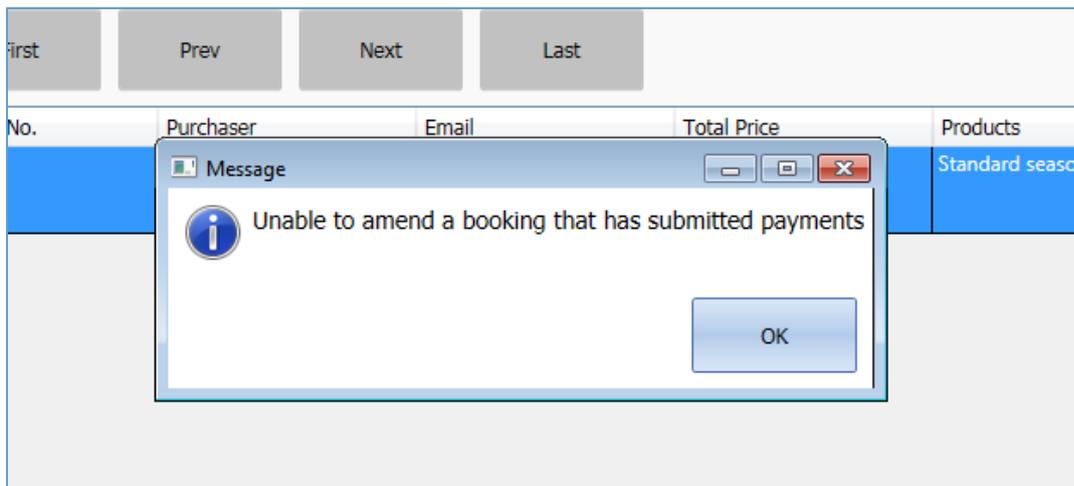
STEP 3: AMEND THE BOOKING IN POS

Before editing the booking using the POS, it is important that you contact the customer and identify how they intend to pay amount that has failed. To amend the booking using the POS carry out the following:

- Use the **Find Booking** tab to find the booking using the Booking Reference identified earlier.
- Select **Amend Booking** alongside the booking.
- The booking will be opened in the shopping cart.
- First, add payment to cover the missed payment:
 - Select **Add Payment**.
 - Select the appropriate payment method and enter the details.
- Next, it is necessary to create a new payment mandate to cover any remaining payments:
 - Select **Add Payment**.
 - Select the **direct debit** payment method.
 - Create a new payment mandate (as described previously).

6.9 AMENDING A DIRECT DEBIT BOOKING

Direct debit bookings cannot be edited whilst a linked booking payment has a status of submitted (i.e. during the period when the payment batch has been submitted to LZ and the responses have not been collected). If you attempt to amend a booking during this period the following error will be displayed:

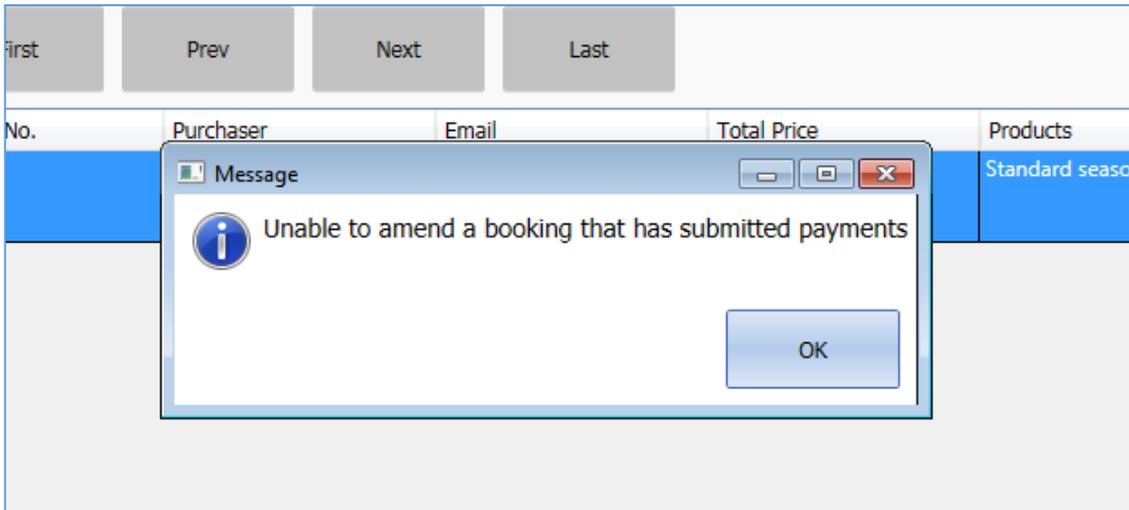


To amend a direct debit booking:

- a) Use the **Find Booking** tab to find the booking.
- b) Select **Amend Booking** alongside the booking.
- c) The booking will be opened in the shopping cart.
- d) Edit the shopping cart contents as required.
- e) Once the details are complete select **Add Payment**.
- f) Process the booking using the Direct Debit payment method (Monthly Payments).
- g) Any payments that have been previously made against the initial booking will be carried forward to the new booking.
- h) The future scheduled payments will be modified to reflect the price of the newly selected products.

6.10 CANCELLING A DIRECT DEBIT BOOKING

Direct debit bookings cannot be cancelled whilst a linked booking payment has a status of submitted (i.e. during the period when the payment batch has been submitted to LZ and the responses have not been collected). If you attempt to cancel a booking during this period the following error will be displayed:



To cancel a direct debit booking:

- a) Use the **Find Booking** tab to find the booking.
- b) Select **Amend Booking** alongside the booking.
- c) The booking will be opened in the shopping cart.
- d) Remove all of the products from the shopping cart.
- e) If a refund needs to be made, select **Add Payment**. Select the payment method to be used. Enter the amount to be refunded before clicking **OK**.
- f) If the full amount paid by the customer up to the point of cancellation is not going to be refunded to the customer, it is necessary to assign the remaining amount against the Direct Debit Refund payment method (select **Add Payment > Direct Debit Refund**)

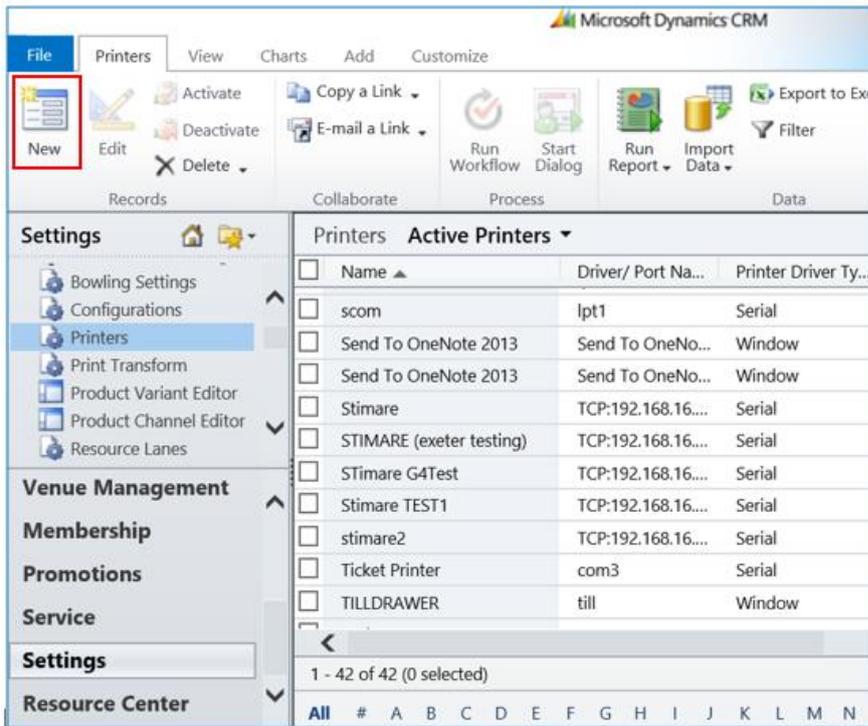
7. PRINTERS

The Printers entity is used to add details of the printers that will be used in conjunction with the Green 4 Ticketing application.

7.1 CREATING A PRINTER RECORD

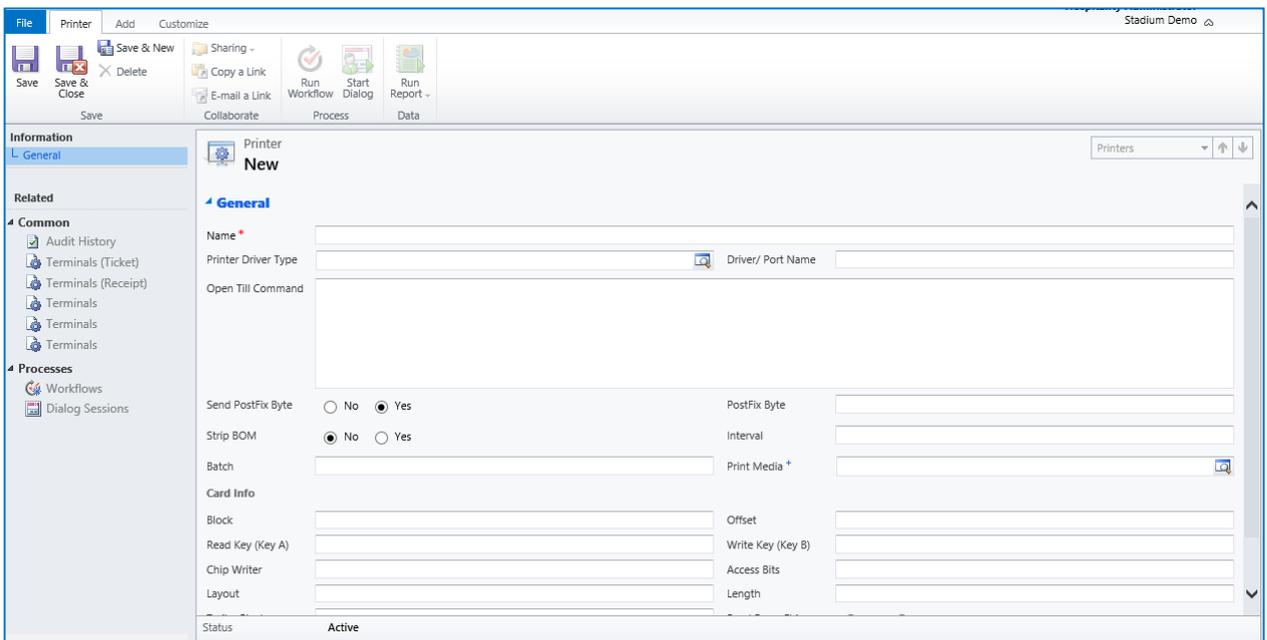
To create a Printers record:

- 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:



Note. It may not be necessary to complete all the fields as differing Green 4 customers require specific fields to be completed for their required functionality to be enabled. The following gives a broad definition and overview of every field in the Printers form.

- **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. Ticket Printer in Shop.
- **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.** Enter the number of seconds that the printer waits before sending batches of data
- **Batch.** Enter the batch sizes that the data is sent to the printer in.
- **Print Media.** Use the Look Up Records dialog to select the unique identifier for the Print Media before clicking **Ok** to return to the printers for. If none are displayed create a new one by selecting New and completing the relevant fields.
- **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.

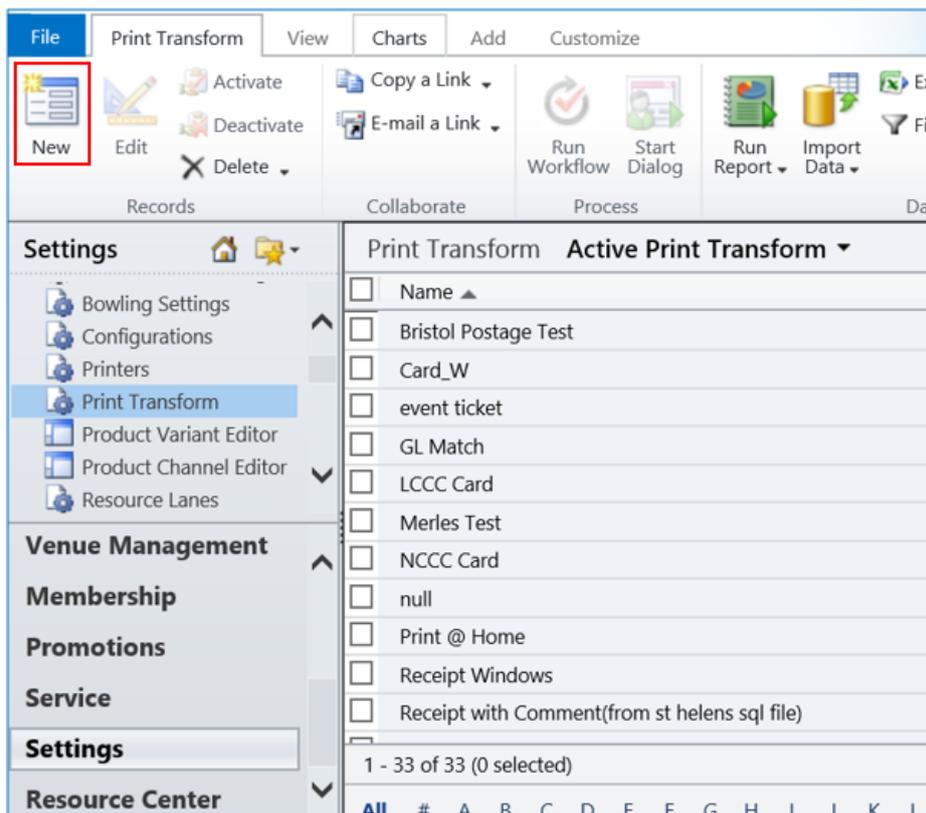
- **Length.** Printer and contactless card configuration settings.
- **Trailer Block.** Printer and contactless card configuration settings.
- **Read From Chip.** Printer and contactless card configuration settings.
- **Write to Chip.** Printer and contactless card configuration settings.

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

7.2 PRINT TRANSFORMS

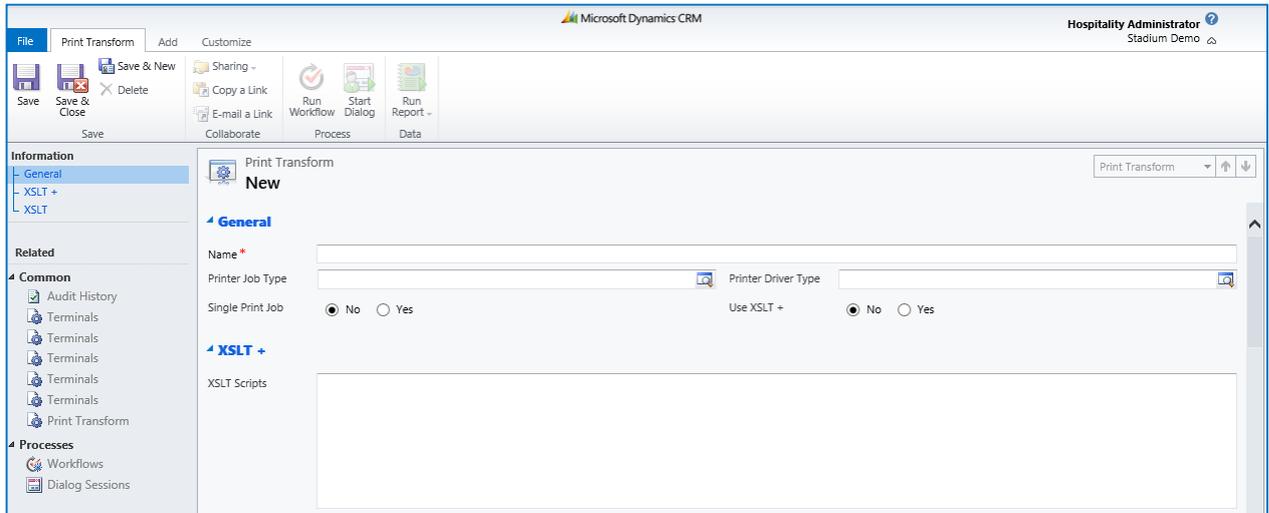
The Print Transform entity is used to define the templates used when printing tickets, receipts or till reports. To create a Print Transform record:

- In the CRM **Navigation Panel** select **Settings** followed by **Print Transforms**.
- The Print Transforms list view will be displayed:



- 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.** Set to **Yes** if single print job required.
- **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 Ticketing 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**.

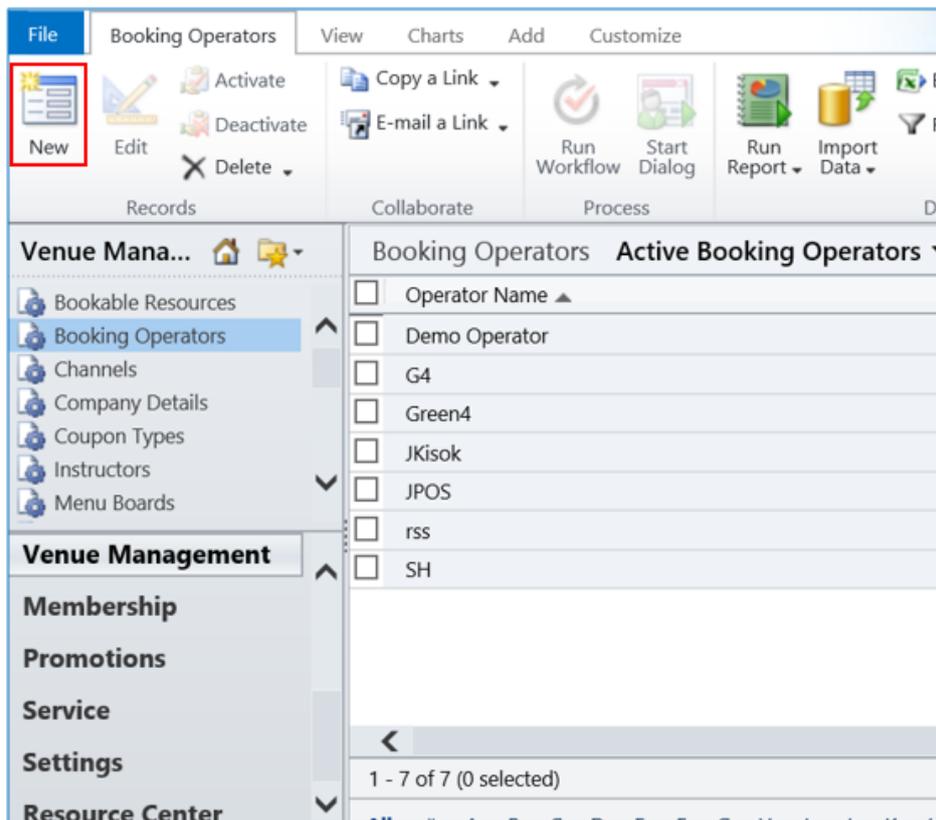
8. BOOKING OPERATORS

Each Green 4 Ticketing 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.

8.1 CREATING A BOOKING OPERATOR RECORD

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 Ticketing application. The pin provided must be unique within Green 4 Ticketing.
- **Dallas Key Code.** If using Dallas Key fobs to log into the POS, enter the code that is read from the Dallas Key that has been assigned to the operator.
- **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.



Note. If when creating your Company Details the Use Operator group's field was enabled, then the selected Operator Group here will only be able to log into the set channel chosen, whereas by default all operators can access all channels.

- **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.

9. ALLOW OFFLINE WORKING

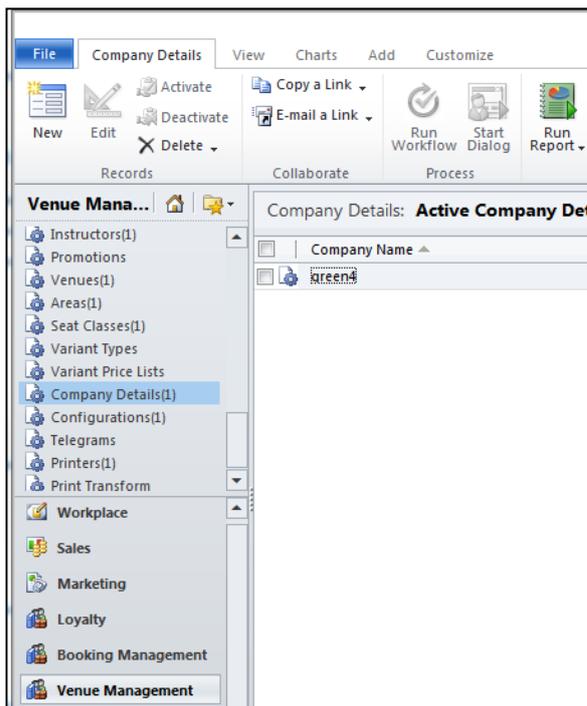
Offline working allows you to continue to use your POS terminals when your internet connection temporarily fails. The functionality available when offline is limited to designated products and payment methods. In addition promotions cannot be applied to bookings made whilst offline.



Note: Before setting up offline working for your organisation, it is necessary to install SQL Server Express on all terminals that will be enabled for offline working.

9.1 SET YOUR ORGANISATION TO ALLOW OFFLINE WORKING

- a) In the CRM **Navigation Panel**, select **Venue Management** followed by **Company Details**. The Company Details view will be displayed:



- b) Double-click over your company details. The company details form view will be displayed.
 c) Ensure the **Allow Offline Mode** option is set to **Yes**.

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

9.2 SET UP TERMINALS

Before a terminal can be used offline, it must have SQL Server Express installed. To prepare a terminal for offline working:

- In CRM, under **Venue Management** select **Terminals**. The Terminals list view will be displayed. Double-click over the appropriate terminal.
- The Terminals form will be displayed.

c) Under the Offline Mode Settings section, complete the following details:

- **Last Synced.** The date the terminal was last synchronised will be displayed.
- **Offline Purchase Window (hours).** Enter the offline purchase window.
- **Offline Till Id.** Enter the till ID. Each offline terminal must have a unique id between (1 and 255)
- **Sync Interval (minutes).** Enter the synch interval (in minutes). The sync interval will determine how often the terminal will be synchronised with the local database.

- **Archive Days.** Enter the number of days archived.
- **Days to Download.** Enter the number of days data to be downloaded to the offline database.

d) Select **Save and Close**.

9.3 SET UP OFF LINE PAYMENT METHODS

Before offline working can be used, you must define which payment methods are to be available. To define a payment method as available offline:

- In CRM, under **Venue Management** select **Payment Methods**. The Payment Methods list view will be displayed. Double-click over the appropriate payment method.
- The Payment Methods form will be displayed.
- Select **Yes** alongside the **Available Offline** option.

The screenshot shows the 'Payment Method' form for 'Cash'. The form has a 'General' section with the following fields:

- Name ***: Cash
- Payment Type**: Cash (dropdown menu)
- External Payment ID**: (empty text box)
- Description**: Cash
- Available Offline**: Radio buttons for 'No' and 'Yes', with 'Yes' selected.

The 'Available Offline' section is highlighted with a red box.

d) Select **Save and Close**.



Note: Payment methods that require an internet connection should not be set to be available offline.

9.4 SET UP OFF LINE BOOKABLE PRODUCTS

Only products that have been defined as available for offline bookings will be available to operators when the internet connection to the EPOS till is lost. To define a product as available offline:

- In CRM, under **Product Management** select **Bookable Products**. The Bookable Products list view will be displayed. Double-click over the appropriate bookable product.
- The Bookable Products form will be displayed.
- Select **Yes** alongside the **Available Offline** option.

The screenshot shows a configuration window for a 'Bookable Product' named 'Chocolate Bar'. The window has a title bar with a gear icon and the text 'Bookable Product' and 'Chocolate Bar'. On the right side of the title bar, there is a dropdown menu labeled 'Bookable Products' with a plus and minus icon. The main area contains several settings:

- Ask Booking Questions: No Yes
- Is Single Booking: No Yes
- Print Vouchers: No Yes
- Is Anonymous: No Yes
- Duration: [Text input field]
- Report Category: [Text input field]
- Code: [Text input field]
- Available Offline: No Yes (highlighted with a red box)
- Mandatory Variants: No Yes

d) Select **Save and Close**.



Note: Products that require or request a beneficiary will not be available for offline bookings. Seated fixture products cannot be sold in offline mode as there is no method of controlling capacity.