

CRM DRIVEN SOLUTIONS FOR SPORT & LEISURE

PROMOTIONS, COUPONS AND VOUCHERS USER GUIDE



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ABOUT THIS DOCUMENT

This document has been prepared as a User Guide for Promotions, Coupons and Vouchers.

NON-DISCLOSURE

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OVERVIEW

Promotions



Promotions can be setup to offer customers the chance to purchase a product at a special rate. To be able to do this the customer must have had access to a promotional code of which they can either enter themselves when purchasing on the WEB or that can be entered into POS by the POS Operator.

Coupons



Coupons have no monetary value, and can only be redeemed against defined activities (for example, used to get a free drink or a reduced price on a match day ticket). Coupons can be sold externally (e.g. Groupon) or internally using the Green 4 Ticketing.

Vouchers



Vouchers have a monetary value (e.g. a £10 voucher) and can be redeemed against a product that you are selling. Vouchers can be set up to be both sold as a product but can also be accepted as a payment mechanism when paying for a product at the checkout where a unique voucher code must be entered.

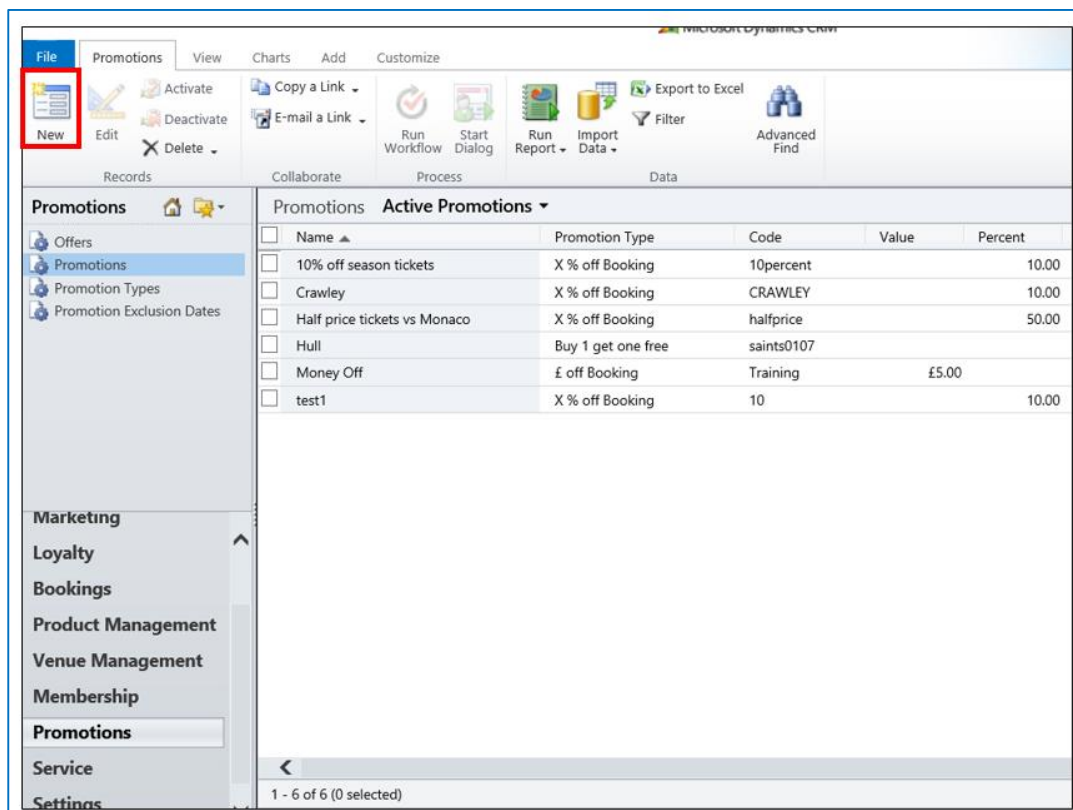
1. PROMOTIONS

The Promotions entity is used to add the details of any promotions that are available to your Green 4 users.

1.1. CREATING A PROMOTIONS RECORD

To create a Promotion record:

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



- Select **New** on the ribbon (highlighted in the above figure).
- A blank Promotions form will be displayed:

e) Complete the following details:

General:

- **Name.** Enter a name for the promotion.
- **Description.** Enter a description of the promotion.
- **Promotion Type.** Use the Look Up button to select the appropriate Promotion Type for example X% Off Booking. If a suitable Promotion Type does not exist, click **New** on the **Look Up Records** dialog. The Promotion Type form will be displayed. Complete the following details before selecting **Save and Close** to return to the Look Up Records dialog:
 - i. **Name.** Enter a name for the promotion type.
 - ii. **Description.** Enter a description for the promotion type.
 - iii. **Sql.** Enter the sql query that will be used to apply the promotion to the customer's shopping cart.
- **Value.** Enter a monetary value for the promotion. This option should be used for **Value of Booking** and **Value of Product** type promotions only.
- **Analysis Category.** Use the Look Up to select an Analysis Category for the promotion to be a part of.

- **Fixture.** If the promotion is to be for a fixture, use the Look Up Records dialog to select the fixture associated with the promotion. This field can be left blank if the promotion is not aimed at a fixture.
- **Require Login.** Select **Yes** if the customer is required to log in to apply the promotion code. Used for the Web channel only.
- **Type.** Use the drop-down list to select the type of promotion. Select from the following options:
 - i. **% of Booking.** Select if the promotion results in the customer receiving a discount worth a defined percentage of the total value of the booking, for example 10% off the total value of the booking.
 - ii. **Value of Booking.** Select if the customer is to receive a promotion worth defined amount subtracted from the value of their booking.
 - iii. **% of Product.** Select if the customer is to receive a discount worth a defined percentage of the cost of a product, for example 10% off the cost of a game.
 - iv. **Value of Product.** Select if the customer is to receive a promotion worth defined amount subtracted from the value of their booking.
- **Code.** Enter the promotional code. The code will need to be entered by the customer in order on the Web or the POS operator to receive their promotional discount.
- **Percent.** Enter a percentage value for the promotion. This option should be used for % of Booking and % of Product promotions only.
- **Bookable Product.** If the promotion is to be for a bookable product, use the Look Up Records dialog to select the product associated with the promotion. This field can be left blank if the promotion is not aimed at a Bookable Product.
- **Series.** If the promotion is to be for a Series, use the Look Up Records dialog to select the series associated with the promotion. This field can be left blank if the promotion is not aimed at a Series.
- **Valid From.** Enter the date and time between which the promotion can be used.
- **Expired Description.** Enter the details of the message that will be displayed when a customer attempts to use the promotion outside the valid time frame.
- **Valid To.** Enter the date and time between which the promotion can be used.

Qualifying Details:

- **Product Group.** Use the Look Up Records dialog to select the product group associated with the promotion.
- **Activities From.** Enter the qualifying period during which activities must occur in order to qualify for the promotion. The code can only be redeemed against activities running on or after this date.
- **Communication Name.** Enter the qualifying ecommunication.
- **Communication Days.** Enter the qualifying ecommunication days.
- **Product Variant Type.** If the promotion is for a specific Variant Type, use the Look Up Records dialog to select the product variant associated with the promotion.
- **Activities To.** Enter the qualifying period during which activities must occur in order to qualify for the promotion. The code can only be redeemed against activities
- **Valid Bookings X Days since Communication.** Enter the number of days after the communication in which bookings must be made in order to qualify.

Reward Details:

- **Reward Product Group.** If a promotion is to be offered for an entire product group, use the Look Up to select a product group, all bookable products that sit under the chosen product group will be subject to the promotion.
 - **Reward Activities To.** If using a Reward Product Group, enter the date that the promotion for this group is available to.
 - **Reward Activities From.** If using a Reward Product Group, enter the date that the promotion for this group is available from.
 - **Exclude these Days.** Select the days that are excluded from the promotion.
- f) Once the details are complete select **Save and Close** on the ribbon. The promotion will be enabled when entering the Promotional Code in the appropriate Channel.

2. COUPONS

Within Green 4 Ticketing coupons have no monetary value, and can only be redeemed against defined activities (for example, used to get a free drink or a reduced price on a match day ticket). Coupons can be sold externally (e.g. Groupon) or internally using the Green 4 Ticketing. Setting up coupons involves a number of entities, each of which represents a level of the hierarchy shown below:



To set up Green 4 Ticketing to allow the use of coupons complete the following steps:

2.1. SETTING UP YOUR COUPON PAYMENT METHOD

Firstly, it is essential that a Coupon type payment method has been created. This is so that products can then be paid for via the use of a Coupon. To create a Coupon payment method:

- a) Select **Venue Management** followed by **Payment Methods**, a list of all current payment methods will be displayed.

The screenshot shows the 'Payment Methods' ribbon in the software. The 'New' button is highlighted with a red box. The ribbon includes options like 'Activate', 'Deactivate', 'Delete', 'Copy a Link', 'E-mail a Link', 'Run Workflow', 'Start Dialog', 'Run Report', 'Import Data', 'Export to Excel', and 'Advanced Find'. Below the ribbon, the 'Payment Methods' table is visible, listing various payment types and their availability.

Name	Payment Type	Available Offline...
Booking Agent	Invoice	
Cash	Cash	Yes
Cashless	Cashless Card	No
Chip and Pin	Chip & Pin	
Commidea Card	Card	No
Coupon	Coupon	No
Credit	Credit	
Credit Account	Credit Account	No
Direct Debit	Finance	No
Direct Debit Absolute	Finance	No
Direct Debit Gloucester	Finance	No
Discount	Discount	
Internal	Invoice	
Invoice	Invoice	
Loyalty	Loyalty	No
One Year DD	Cash	
Points	Loyalty	No
Reservation	Reservation	
RFL/Sponsor	Invoice	
rss	Invoice	

- Select **New** on the ribbon.
- A new Payment Method form will be displayed. Complete the following:

The screenshot shows the 'Payment Method' form with the 'General' tab selected. The form includes fields for Name, Payment Type, Description, External Payment ID, Set amount to booking total, Sequence Number, Post, Error Redirect, Auto Advance Days, Code, Charges, Charge Amount, Charge Percentage, Tab Payment, Tab Visibility Global, Finance Payment, and Payment Schedule. There are also radio buttons for 'Available Offline', 'Auto Pay', 'Collect Account Data', and 'Requires Mandate'.

- Name.** Enter the name of the payment type, for example Coupon.
- Payment Type.** Select **Coupon** from the drop down list.
- Description.** Enter a description of the payment type.



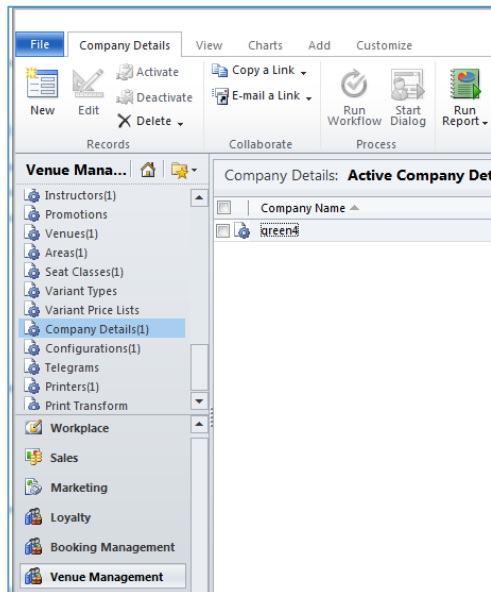
Note: All other fields should not be completed or changed and left in the default selection.

- d) Select **Save and Close** in the ribbon.

2.2. Setting up your Organisation to Accept Coupons

The next step is to ensure that your organisation is set up to accept Coupons, to do this complete the following:

- 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 **Use Coupons** option is set to **Yes**.

Use Coupons ☐ No ☒ Yes

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

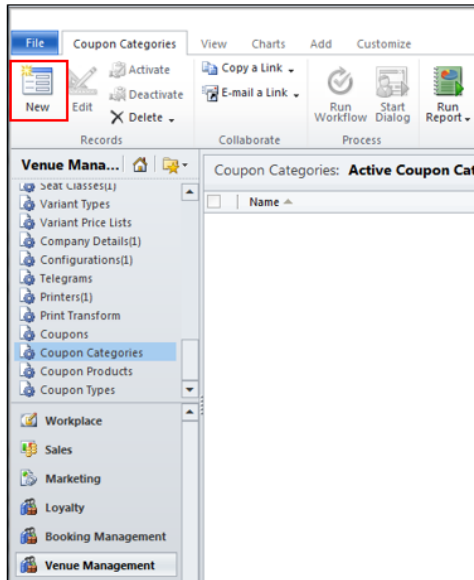


Note: There should be only one company details record displayed or set up. Do not create further or a New company details forms.

2.3. SETTING UP THE COUPON CATEGORY

A Coupon Category must be created to hold the coupon under. For example if the Coupon created is to be for a membership a Coupon Category called Membership Coupons could be created. The instructions below outline how to do this:

- a) In the CRM **Navigation Panel**, select **Venue Management** followed by **Coupon Categories**.
b) The Coupon Category view will be displayed:



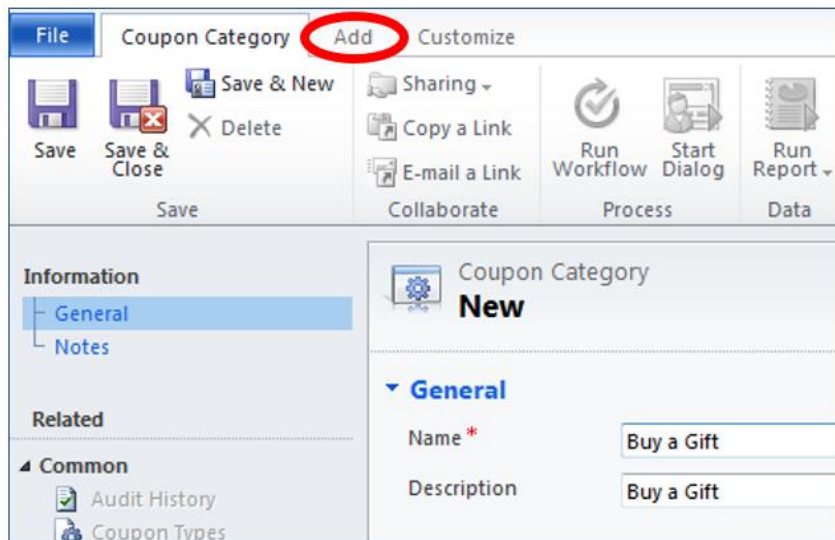
- c) To create a new Coupon Category, select **New** on the ribbon (highlighted above).
- d) A blank Coupon Category form will be displayed:

- e) Complete the following details:
- **Name.** Enter a name for the coupon category.
 - **Description.** Enter a description for the coupon category.
- f) Once the details are complete, select **Save** on the ribbon.

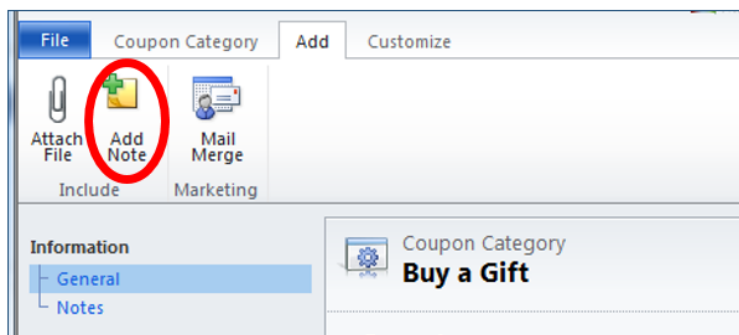
TO ADD AN IMAGE TO THE COUPON CATEGORY:



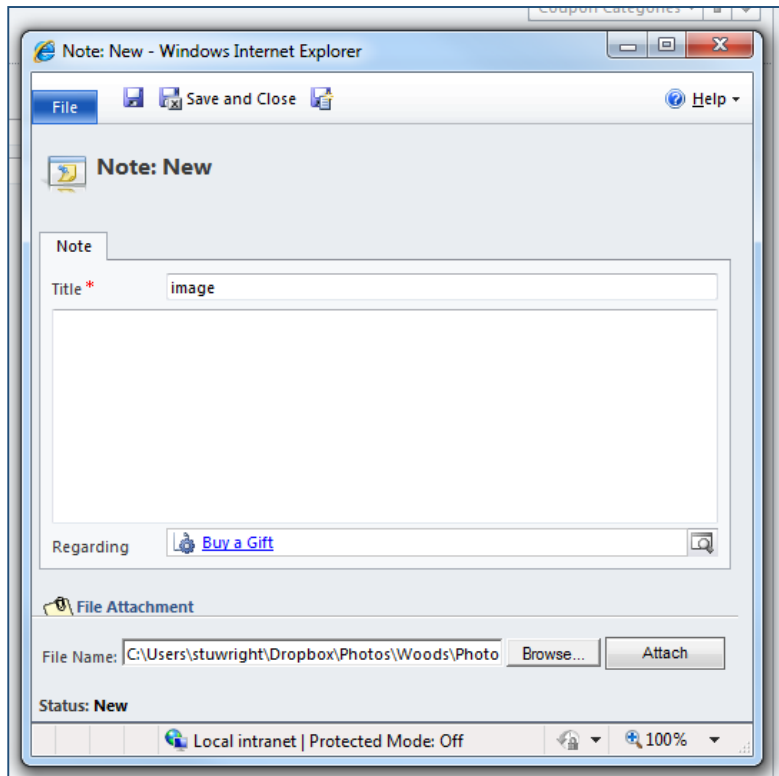
Note: It is not essential to add an image to a coupon category. It is your preference.



- a) Select **Add** from the ribbon (Highlighted above) once completing the Coupon Category form.
- b) Select **Add Note** from the Add menu (See below).



- c) You will be presented with the below box. Type **Image** in the title and then select the file for the coupon provider using the browse button.
- d) Once you have selected your file then select **attach**.

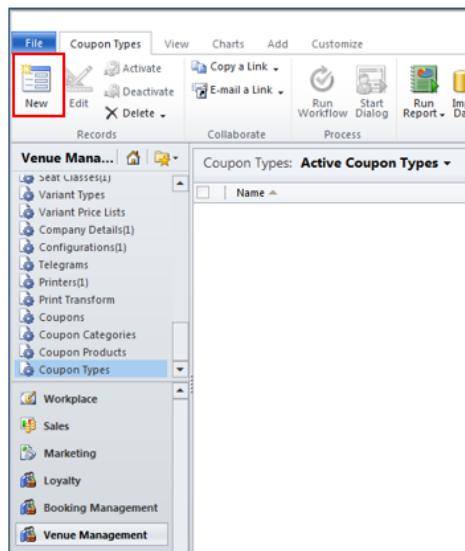


- e) Select **Save and Close**
- f) Then go back to the **Coupon Category tab** and select **Save and Close**.

2.4. SETTING UP THE COUPON TYPE

The Coupon Type is where the current deal for the coupon is set up, for example, the redeem by date and other important information for the coupon. To create the Coupon Type, the instructions below must be completed:

- In the CRM **Navigation Panel**, select **Venue Management** followed by **Coupon Types**.
- The Coupon Type view will be displayed:



- To create a new Coupon Type, select **New** on the ribbon (highlighted above).
- A blank Coupon Type form will be displayed:

The screenshot shows the 'New Coupon Type' form in Microsoft Dynamics CRM. The form is titled 'Coupon Type' and has a 'New' button. The 'General' tab is selected, showing fields for 'Name', 'Description', 'Number of Codes', 'Display Price', 'Redeem by Date', 'Use by Date', 'Not Valid Until Date', 'Code 1 Pre-Existing', 'Code 1 Regex', 'Payment Method', 'Coupon Category', 'Collect Coupon', 'Redeem by Days', 'Use by Days', 'Not Valid Until Days', 'Code 2 Pre-Existing', 'Code 2 Regex', and 'Product Calendar'. The 'Name' field is highlighted with a red box.

- Complete the following details:
 - Name.** Enter a name for the coupon type.
 - Description.** Enter a description for the coupon type.

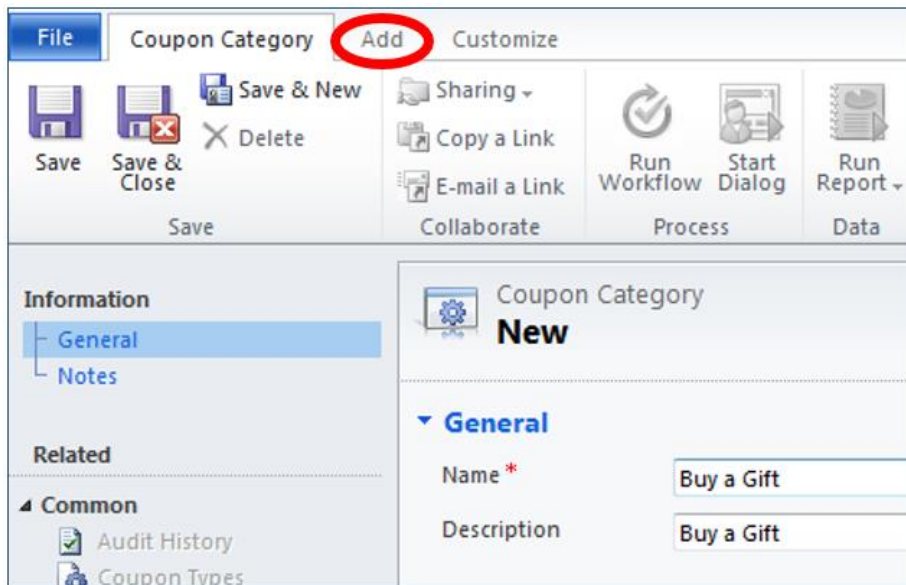
- **Number of Codes.** Enter the number of coupon codes to be collected. Options available are 1 or 2.
 - **Display Price.** Enter the display price for the coupon.
 - **Redeem by Date.** Enter the date the coupon must be redeemed by. If a date is entered, once the date has passed any coupons that have not been redeemed will be marked as expired.
 - **Use by Date.** The coupon will only be valid prior to the use by date. Enter the date that unused coupons will be marked as expired once this date has passed.
 - **Not Valid Until Date.** The coupon cannot be redeemed before the not valid until date. Used for coupons sold externally.
 - **Code 1 Pre-Existing.** Select **Yes** if the coupon code 1 pre-exists and is not matched based on a regex.
 - **Code 1 Regex.** If a regex is used to validate the coupon code entered, enter the details
 - **Payment Method.** Enter the payment method to be used to process coupon redemptions (e.g. set up a coupon payment method).
 - **Coupon Category.** Select the coupon category selected in the previous step.
 - **Collect Coupon.** Select **Yes** if the coupon has to be collected from the customer.
 - **Redeem by Days.** Enter the number of days in which the coupon must be redeemed. Unused coupons will be marked as expired once the number of days has passed.
 - **Use by Days.** The coupon will only be valid for this many days after the sale date. Enter the number of days that unused coupons will be marked as expired once the entered number of days has passed.
 - **Not Valid Until Days.** The coupon cannot be redeemed until this many days after the sale. Enter the correct number of days.
 - **Code 2 Pre-Existing.** Select **Yes** if the coupon code 2 pre-exists and is not matched based on a regex.
 - **Code 2 Regex.** If a regex is used to validate the coupon code entered, enter the details.
 - **Product Calendar.** Use the Look Up Records dialog to select the **default** product calendar.
- f) Once the details are complete, select **Save** on the ribbon to save the changes made but leave the form open.

To add an Image to the Coupon Type

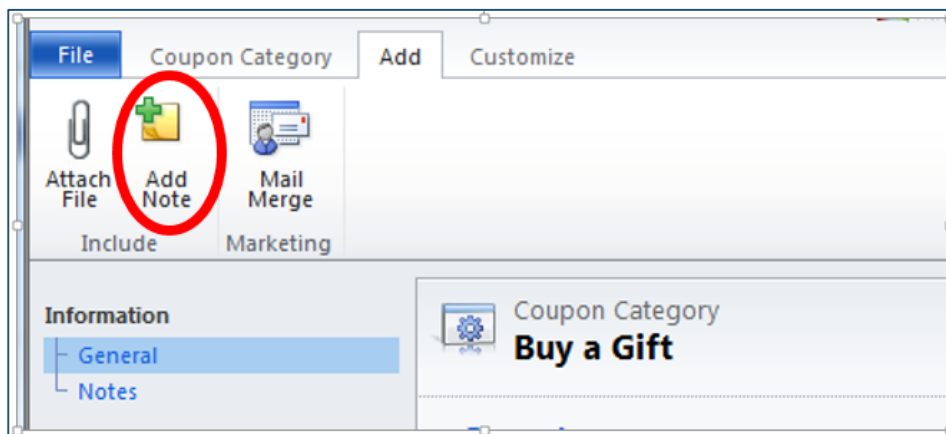


Note: It is not essential to add an image to a coupon type. It is your preference.

- a) Select the **Add** tab.



b) Then from the menu select **Add Note**.

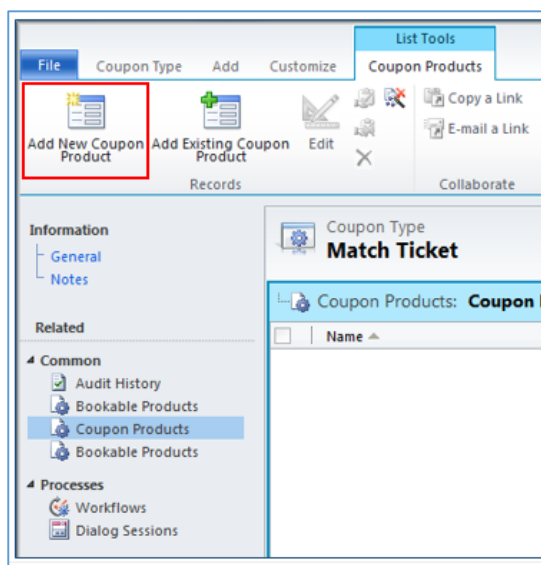


- c) You will be presented a box. Type **Image** in the title and then select the file for the coupon provider using the **browse** button.
- d) Once you have selected your file then select **attach** before selecting **Save and Close**.
- e) This will bring you back to your completed Coupon Type Form. Select the **Coupon Type** tab before selecting **Save** on the ribbon.

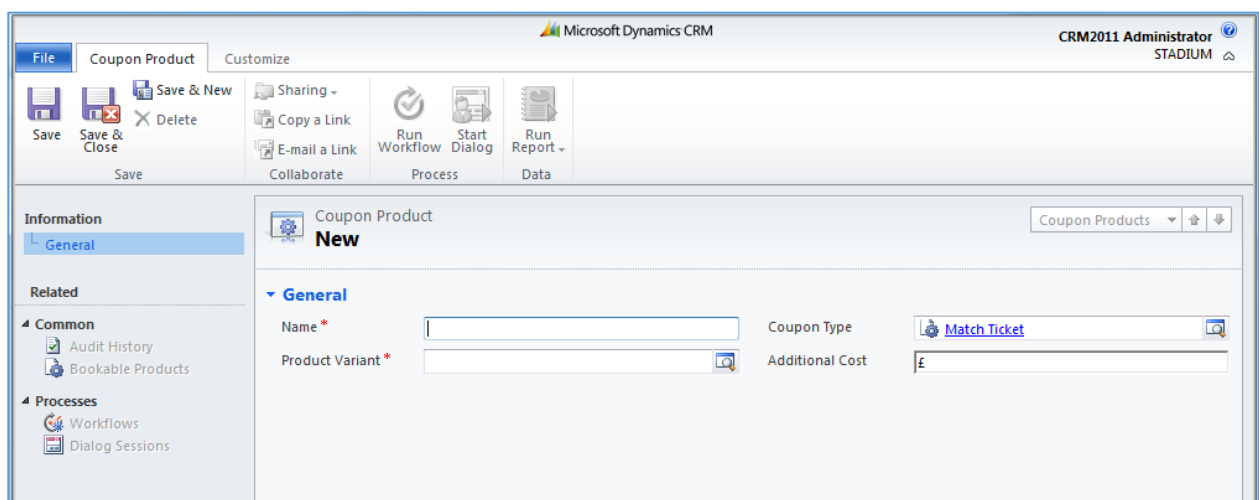
2.5. SETTING UP THE COUPON PRODUCT

The Coupon Product is the product that can be brought via the use of the coupon. Multiple Coupon Products can be added to be used against one coupon. To set up the Coupon Product the steps below must be followed:

- a) With the Coupon Type form still open, in the form navigation panel, select **Coupon Products**.
- b) The Coupon Products view will be displayed:



- c) To add a coupon product, select **Add New Coupon Product** on the ribbon.
- d) A blank Coupon Product form will be displayed:



- e) Complete the following details:

- **Name.** Enter a name for the coupon product.
 - **Coupon Type.** The coupon type field will be automatically completed.
 - **Product Variant.** Use the look up to select the product variant the customer will be able to purchase with the coupon, for example a fixture ticket.
 - **Additional Cost.** Enter the additional cost for the product variant. In this instance enter 0 as the customer will not be expected to pay extra for the fixture ticket.
- f) Once the details are complete, select **Save and Close** on the ribbon.
- g) Repeat the process of adding coupon products to cover all of the products that can be purchased using the coupon.
- h) The Coupon Type form will be redisplayed. Select **Save and Close** on the ribbon.

2.6. CREATE THE COUPON BOOKABLE PRODUCT

It is essential to create a coupon type Bookable Product, this will control the cost of the coupon and what channels the coupon will be available via.

It is assumed that the following items have been set up in CRM:

- **Channels.** The channels the products will be sold via.
- **Variant Types.** The divisions of the product available. Variant types should be reused where possible. For more information on how to create Variant Types see the Green 4 Ticketing Booking Product Management User Guide.
- **Variant Price List.** The variant price list is used to enter pricing information for the product. For more information on how to create a Variant Price List see the Green 4 Ticketing Booking Product Management User Guide.
- **Sales Plan.** A default sales plan of type Other linked to the company details needs to be set up.

Step 1. Set up your Channel Price List.

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.

- a) To set up a channel price list:
- b) On the CRM navigation panel, select **Sales Plan** on the **Product Management** tab.
- c) A list of sales plans matching the view criteria will be displayed.
- d) Open the **Default Sales Plan** (the default sales plan should be linked to the company details record in CRM).
- e) Select **Channel Price List** in the form navigation area.
- f) 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.
- g) 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.

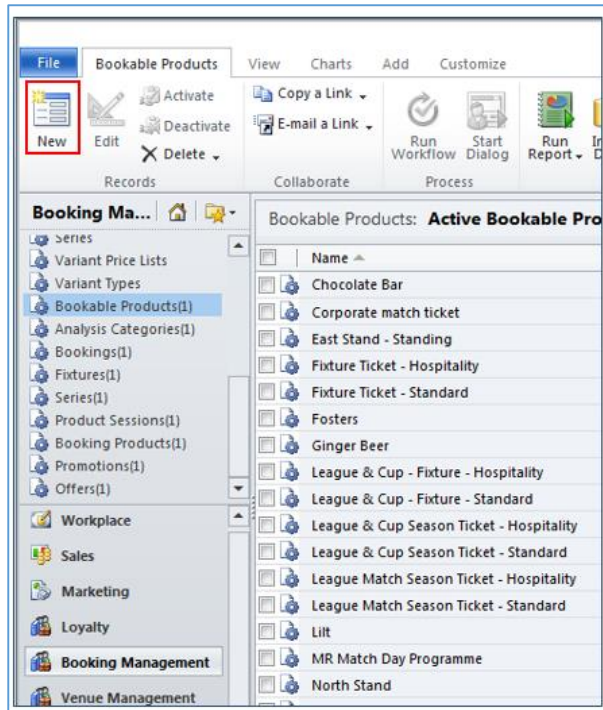
A channel price list will need to be created for each Variant Price List – Channel combination created.

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

Step 2. Create the Bookable Product

To set up a Bookable Product for a coupon, complete the following:

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



- To create a new bookable product, select **New** on the ribbon (highlighted above).
- A blank Bookable Product form will be displayed:

- Complete the following fields:

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.
- **Type.** Use the drop-down list to select the type of product. In this instance select **Coupon** 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. Select from the following options:
 - i. **Not Required.** The customer will not be asked for their name and contact details.
 - ii. **Requested.** The customer will be asked for their name and contact details, but can skip this option if they do not wish to provide their details.
 - iii. **Required.** The customer must provide their name and contact details. This option should be selected when setting up a season ticket or membership product.
- **Report Category.** Used for reporting purposes to categorise the products sold through Green 4 Ticketing.
- **Print Vouchers.** Select **Yes** if the coupon is to be printed. If this option is enabled the Print Vouch/Coup button will be enabled in the POS.
- **Is Anonymous.** Select **Yes** if the purchaser is not required to provide a name when buying the product. The channel must be set to allow anonymous purchases also.
- **Available Offline.** Select **Yes** if the bookable product is to be available for purchase through the offline POS. This option cannot be used for products that require capacity to be monitored.

Referring Entities:

- **Category.** Use the Look Up dialog to select the product category. The category is used to group products. The category is used by the price list editor.
- **Product Calendar.** Select the default product calendar.
- **Coupon Type.** Use the Look Up Records dialog to select the coupon type that you have previously set up.

- **Variant Type Category.** Use the Look Up Record dialog to select the category. Used to group the variant types into categories for reporting purposes and is used by Variant Price Lists.

Time Settings:

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

Delivery Options:

- **Print at Home.** Select **Yes/No** depending on if the coupon is available to print at home.
- **Requires Delivery.** Select **Yes/No** depending on if the coupon requires delivery.



Note: All other fields should not be completed or changed and left in the default selection.

- 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 POS or Web.
 - Select **Save** on the ribbon.
- f) 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.

The screenshot shows the 'Bookable Product' interface for a product named 'test'. The left sidebar contains 'Information' (General, Channels, Variants & Pricing, Bowling, Notes) and 'Related' (Common: Activities, Closed Activities, Audit History, Additional Products). The main area shows the 'Variants & Pricing' section. A red box highlights a dropdown menu with a plus sign, and an arrow points to a 'Variant Type' button.

- Repeat until all variants are listed. If you need to remove a variant, click the red minus sign alongside the variant. For coupons, usually only one Variant needs adding, this usually being a variant of 'Each'.



Note. Once a variant is sold it can then not be removed from the Variant and Pricing list. Therefore ensure the correct variants are set up for your product before you begin to sell them.

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

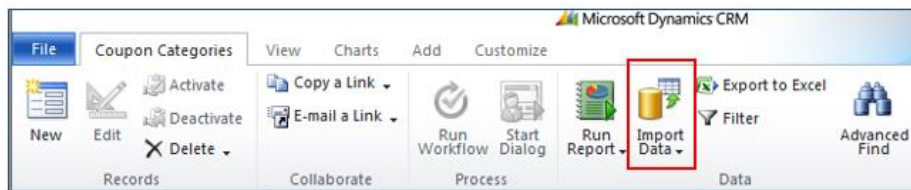
The screenshot shows the 'Bookable Product' interface for a product named 'Coupon Adult'. The left sidebar contains 'Information' (General, Channels, Variants & Pricing, Bowling, Notes) and 'Related' (Common: Activities, Closed Activities, Audit History, Additional Products). The main area shows the 'Variants & Pricing' section. A red box highlights a dropdown menu with 'default' selected. Below this, there is a table with columns: Code, Not for Sale, Mandatory Variant, Peak Price, and Off Peak Price. The table contains one row for 'Coupon Adult (Each)' with values 0.00 for Peak Price and 0.00 for Off Peak Price.

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

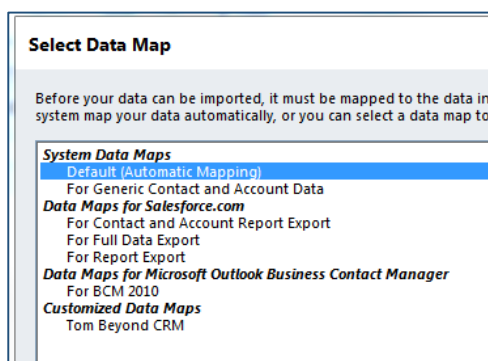
2.7. IMPORTING COUPONS

If you use coupons sold by an external provider, for example Groupon, it will be necessary to import the information sent to you by the provider into Green 4 Ticketing. External providers will normally provide you with a list of sold coupons in the form of a spread sheet. To upload the spread sheet details into Green 4 Ticketing:

- a) Open the spread sheet provided by the external provider. Ensure the following columns and column names are present:
 - **Name.** Displays the name for the coupon
 - **Coupon Code.** This is the main coupon code. If the coupon uses two codes, ensure the column headings are **coupon code 1** and **coupon code 2**.
 - **Available.** Create a column labelled **Available** and enter the value of **available** for all rows.
 - **Coupon Type.** Create a column labelled **Coupon Type** and enter the name of the coupon type that you are matching coupons to. The name entered should match that set up in Green 4 Ticketing. Ensure the coupon type name is copied to all rows.
- b) Once the details are complete save the spread sheet as a **CSV** file.
- c) Log into Green 4 Ticketing and select **Import Data** on the ribbon.



- d) The Import Data Wizard will be displayed. Use the **Browse** button to search for the CSV file.
- e) Select **Next** to continue.
- f) The Review File Upload Summary page will be displayed. Check the information displayed is correct before selecting **Next**.
- g) The Select Data Map page will be displayed. Unless you have set up a data mapping for importing coupons select **Default (Automatic Mapping)** from the list. Select **Next** to continue.



- h) The Map Record Types page will be displayed. Select **Coupon** from the drop-down list:

Map Record Types [Help](#)

Map the source data files to the target Microsoft Dynamics CRM record types. If a source file cannot be mapped to an existing record type, you can create a new record type or choose to skip importing the data.

✓ The data files have been successfully mapped to the target Microsoft Dynamics CRM record types.

Source Data Files	Microsoft Dynamics CRM Record Types
✓ Test	Coupon

- i) Select **Next** to continue.
- j) The Map Fields page will be displayed. Map the fields as shown below:

Map Fields [Help](#)

Select the Microsoft Dynamics CRM record type and map each source field to a target Microsoft Dynamics CRM field. We suggest that you map all the required fields before you click Next.

✓ All the record types with fields have been successfully mapped.

CRM Record Types	Source Fields	CRM Fields	Show All
✓ Coupon	Required Fields		
	Coupon code	Coupon Code	
	Available	Coupon Status (Option Set)	
	Deal Name	Name	
	Optional Fields		
	Coupon Type	Coupon Type (Lookup)	

- k) Select **Next** to continue.
- l) The Review Mapping Summary page will be displayed. Confirm the details are correct before selecting **Next** to continue.
- m) The Review Settings page will be displayed. Use the default settings.
- n) Select **Submit** to confirm the import.
- o) Select **Finish** to close the wizard.
- p) The import may take time to complete. The results can be viewed by selecting **Imports** on the **Workplace** tab of the CRM **Navigation Panel**.

COUPONS CHECK LIST

Task	Completed?	Comments
Set up the Coupon Payment Method- This is so that products can be purchased via the use of a Coupon.		Ensure the Payment Type chosen is that of a Coupon.
Set up the organization to accept Coupons		In the Company Details form ensure that the Use Coupons option is set to Yes
Set up the Coupon Category- This is the name that the Coupon will be held under		This should be given a name linked to what the Coupon is to be used for.
Set up the Coupon Type- This is the current deal for the Coupon		<p>Ensure the Coupon Category that was previously created is entered</p> <p>Ensure the Number of Codes field is entered with either 1 or 2</p> <p>Ensure the various relevant Coupon dates have been entered that control the Coupons availability</p>
Set up the Coupon Product- This is the product that can be brought via the use of the Coupon.		Ensure a Product Variant has been entered which will then be available to purchase with the use of a Coupon.
Create the Coupons Channel Price List- This will control the time and date the product is on sale as well as linking a variant price list to the channel		<p>The channel price list should be linked to the default sales plan</p> <p>Ensure a Channel price List has been created to link the channels to the variant price list on which prices have been entered.</p> <p>Ensure the channel price list dates are valid.</p> <p>A channel price list will need to be created for each Variant Price List – Channel combination created.</p>
Create the Coupon Bookable Product- This will control the cost of the coupon and what channels the coupon will be available via.		<p>Ensure the Bookable Product type selected is Coupon</p> <p>Ensure a Category and Product Calendar have been entered</p> <p>Ensure that the Coupon Type previously created is entered</p> <p>Ensure the relevant channel check boxes are ticked</p> <p>Ensure a variant has been added</p> <p>Prices should be added to an active Variant Price List that has been linked to a Channel Price List.</p>

3. VOUCHERS

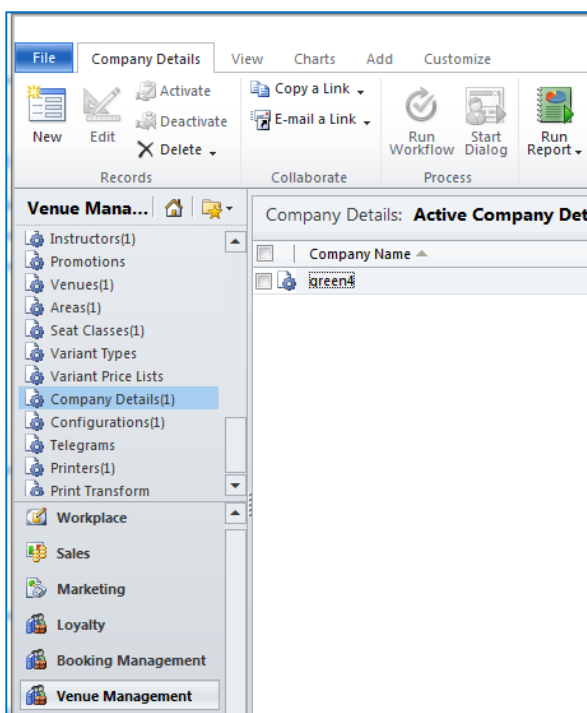
Within Green 4 Ticketing vouchers have a monetary value (e.g. £10 voucher) and can be redeemed against any product. Vouchers are sold by your organisation using Green 4 Ticketing.

To set up Green 4 Ticketing to allow the use of vouchers complete the following steps:

3.1. SET YOUR ORGANISATION TO ACCEPT VOUCHERS

Firstly be sure to have set your organisations Company Details to accept the use of vouchers. To do this complete the following instructions:

- 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 **Use Vouchers** option is set to **Yes**.

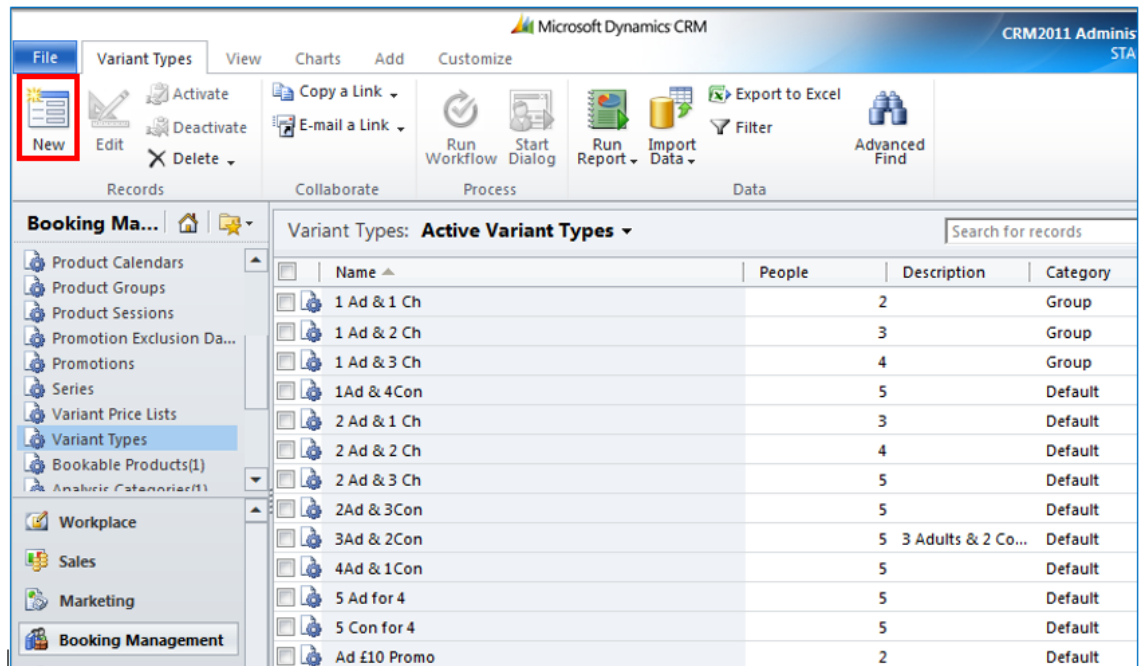
- d) Once the details are complete, select **Save and Close** on ribbon.

3.2. CREATING THE VOUCHER VARIANT TYPES

The first step is to create the vouchers variant types (if they do not already exist in your system). The Variant Type entity is used to create categories of products, for example £10 Voucher, £20 Voucher, £50 voucher. To create a Variant Type record from the Product Variants form:

- 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) Select **New** on the ribbon (highlighted in the above figure).
- d) A blank Variant Type form will be displayed:

Variant Type
New

General

Name * People *

Translated name

Description

Skidata Class Code Category

Voucher Value £ Tariff Code

Sequence Conversion Factor

- e) Complete the following details:
- **Name.** Enter a name for the variant type.
 - **People.** Enter the amount of people the voucher applies to.
 - **Translated Name.** Used for translated implementations of Green 4 Ticketing.
 - **Description.** Enter a description of the variant type.
 - **Category.** Used to group the variant types into categories.

- **Voucher Value.** Enter the value of the voucher. This represents the amount the voucher is worth when it is redeemed by the customer. For example if the Voucher Variant type is for a £10 Voucher, enter the number 10.
- **Sequence.** Used to determine the order in which variants are listed on the Green 4 Ticketing POS or ticketing web site.



Note: All other fields that are not displayed above do not need to be created.

- Select **Save** on the ribbon to save the changes made.
- Repeat the above process for each voucher value that is required.

3.3. CREATE THE VOUCHER BOOKABLE PRODUCT

It is essential to create a voucher type Bookable Product, this will control the cost of the voucher and what channels the voucher will be available via.

It is assumed that the following items have been set up in CRM:

- **Channels.** The channels the products will be sold via.
- **Variant Price List.** The variant price list is used to enter pricing information for the product. For more information on how to create Variant Price List see the Green 4 Ticketing Booking Product Management User Guide.
- **Sales Plan.** A default sales plan of type Other linked to the company details needs to be set up.

Step 1. Set up your Channel Price List.

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



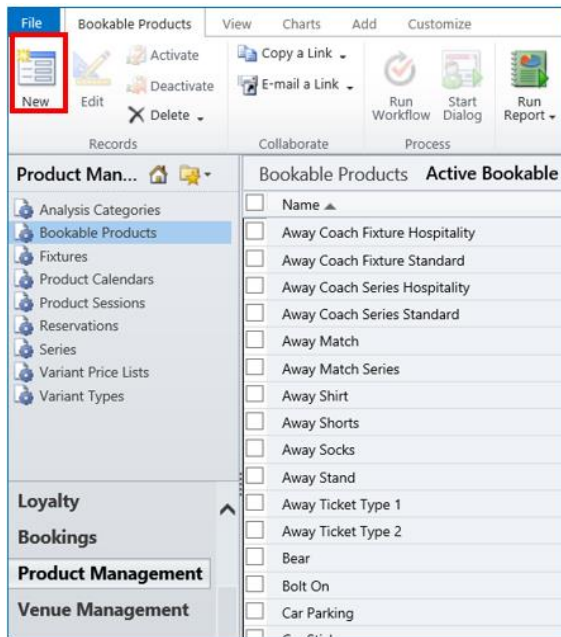
Note: All other fields in the Channel Price List form that have not been described above do not need to be completed/changed.

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

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

Step 2. Create the Bookable Product

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



c) To create a new bookable product, select **New** on the ribbon (highlighted above).

d) A blank Bookable Product form will be displayed. Complete the following details:

General:

- **Name.** Enter Voucher as the name of the product.
- **Translated Name.** Used for translated implementations.
- **Description.** Enter a description of the product.
- **Type.** Use the drop-down list to select the type of product. In this instance select **Voucher** from the list of available values.
- **Is Anonymous.** Select **Yes** if the purchaser is not required to provide a name when buying the product. The channel must be set to allow anonymous purchases also.
- **Print Vouchers.** Select **Yes** if the Voucher is to be printed. If this option is enabled the Print Vouch/Coup button will be enabled in the POS.
- **Sequence.** If applicable, enter a sequence number for the product. The sequence number is used to determine the order in which products are displayed in the POS and Web channels.
- **Beneficiary Requirement.** Use the drop-down list to select if a customer's name is required when the product is purchased. Select from the following options:
 - i. **Not Required.** The customer will not be asked for their name and contact details.
 - ii. **Requested.** The customer will be asked for their name and contact details, but can skip this option if they do not wish to provide their details.

iii. **Required.** The customer must provide their name and contact details. This option should be selected when setting up a season ticket or membership product.

- **Report Category.** Used for reporting purposes to categorise the products sold through Green 4 Ticketing.
- **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.** Enter the number of days the voucher will be valid for.

Referring Entities:

- **Category.** Use the Look Up dialog to select the product category. The category is used to group products. The category is used by the price list editor.
- **Product Calendar.** Select the default product calendar.

Time Settings:

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

Delivery Options:

- **Print at Home.** Select **Yes/No** depending on if the voucher is available to print at home.
- **Requires Delivery.** Select **Yes/No** depending on if the voucher requires delivery.



Note: All other fields should not be completed or changed and left in the default selection.

- Once the details are complete, select **Save** on the ribbon.
- 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 POS or Web.

- Select **Save** on the ribbon.
- g) 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 Voucher Variants that were previously created,
 - Select the green cross alongside the variant name to add.

The screenshot shows the 'Bookable Product' form with the 'Variants & Pricing' section active. On the left, there is a navigation pane with 'Variants & Pricing' selected. The main area shows a dropdown menu for selecting a variant, which is highlighted with a red box. A green plus icon is visible next to the dropdown. A callout box labeled 'Variant Type' points to the dropdown menu.

- Repeat until all of the Voucher 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)

The screenshot shows the 'Bookable Product' form with the 'Variants & Pricing' section active. At the top of the section, there is a dropdown menu for selecting a price list, which is highlighted with a red box and contains the text 'QA'. Below this, there is a table with columns for 'Code', 'Not for Sale', 'Mandatory Variant', 'Peak Price', and 'Off Peak Price'. The table contains two rows of data for 'Voucher (£10 Voucher)' and 'Voucher (£20 Voucher)'. At the bottom of the table, there is a dropdown menu with a green plus icon next to it.

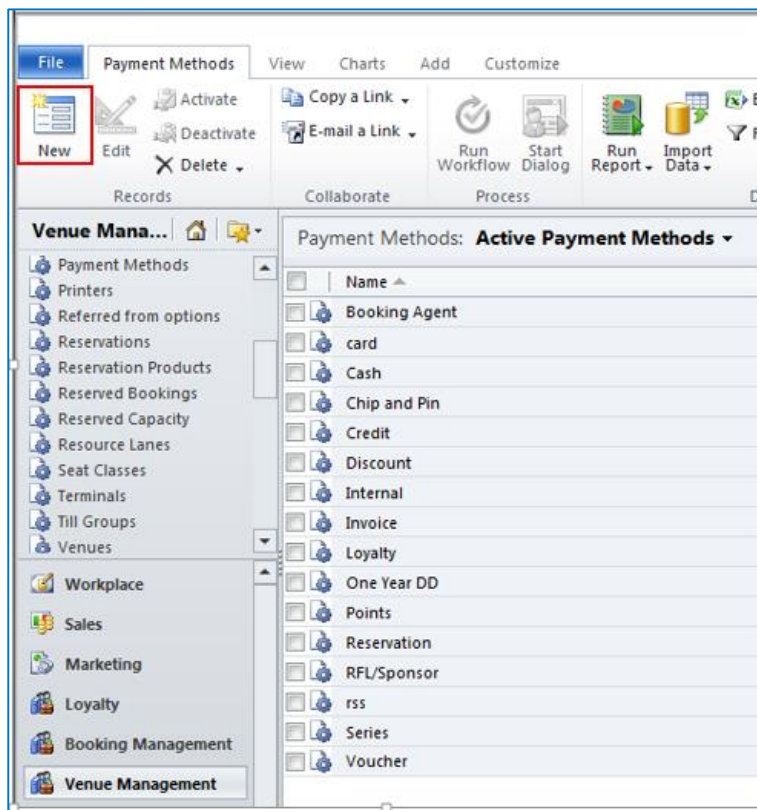
	Code	Not for Sale	Mandatory Variant	Peak Price	Off Peak Price
Voucher (£10 Voucher)		<input type="checkbox"/>	<input type="checkbox"/>	10.00	10.00
Voucher (£20 Voucher)		<input type="checkbox"/>	<input type="checkbox"/>	20.00	20.00

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

3.4. CREATE THE VOUCHER PAYMENT METHOD

In order to accept vouchers as payment for products purchased through Green 4 Ticketing, it is necessary to add the Voucher (Managed) payment method to the channel(s) through which vouchers can be used. To set up the payment method for the POS 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:

- **Name.** Enter a name for the payment type. The name will be displayed to the user in the Green 4 Ticketing application when they select to pay for their goods.
- **Payment Type.** Use the drop-down list to select **Voucher (Managed)**.
- **Description.** Enter a short description of the payment method.



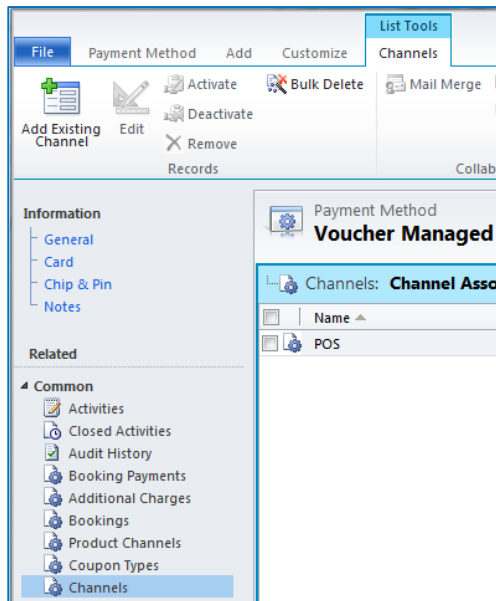
Note: All other fields should not be completed or changed and left in the default selection.

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

Defining Channels

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

- Select **Channels** in the **Form Navigation** panel.
- 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 voucher payment method.

3.5. REVIEWING THE VOUCHER AVAILABILITY IN CRM

Once a Voucher has been purchased, its availability and unique number that has been generated can be reviewed. To view the availability and unique number of a Voucher complete the following in CRM:

- a) Select **Venue Management**, followed by Voucher, a list of all the Vouchers that have been purchased will be displayed.

The screenshot shows the 'Vouchers' section with a list of active vouchers. The table has columns for Customer Name, Reference Number, Voucher Status, Booking, Value, Purchase Date, and Expiry Date. The 'Voucher Status' column shows 'Available' and 'Redeemed'.

Customer Name...	Reference Numb...	Voucher Status	Booking	Value	Purchase Date	Expiry Date
Joe Walker	RHR1C-G90GB-...	Available		£20.00	25/09/2014	25/09/2015
joe walker	YH904-GCF3Q-...	Available		£20.00	09/12/2014	09/12/2015
Wes Morgan	XH90B-GC3BR-2...	Available		£10.00	09/12/2014	09/12/2015
new customer	CHQ1N-F90FT-L...	Available			24/09/2014	24/09/2015
Joseph Walker	5HQ0A-FBGFA-...	Redeemed		£20.00	24/11/2014	24/11/2015
Joe Walker	VHR0Q-G9JWW-...	Available			25/09/2014	25/09/2015
Joe Walker	1HR05-G9AEQ-...	Redeemed		£20.00	25/09/2014	25/09/2015
Jenny Murphy	9HP0M-C9L2U-...	Available			23/09/2014	23/09/2015
Joe Walker	JHR04-G9JAU-L...	Redeemed		£20.00	25/09/2014	25/09/2015

- b) The column, **Voucher Status** displays if the Voucher that has been purchased is either still Available or has been Redeemed.

- c) To review a particular Voucher, select the appropriate Voucher. The voucher form will be displayed.

Voucher
VOUCHER

Vouchers

General

Reference Number RHR1C-G90GB-B01AY

Voucher Status* Available

Booking

Purchase Date 25/09/2014

Printed ☐ No ☐ Yes

Value £20.00

Customer Name Joe Walker

Expiry Date 25/09/2015

Emailed ☐ No ☐ Yes

Name* VOUCHER

Notes

- d) The field named **Reference Number** displays the Voucher number that is entered into either the POS or Web to redeem the vouchers value against a product.
- e) The field named **Voucher Status** displays if the Voucher that has been purchased is either still Available or has been Redeemed. If the Voucher has been redeemed the field will automatically change from displaying Available to Redeemed.

VOUCHERS CHECK LIST

Task	Completed?	Comments
Set up the organization to accept Vouchers		In the Company Details form ensure that the Use Vouchers option is set to Yes
Create the Voucher Variant Types- Used to create categories of products, for example £10 Voucher, £20 Voucher, £50 voucher		Ensure a Voucher Value is entered that represents the value of the voucher for each Voucher Variant Type that is created
Create the Voucher Channel Price List- This will control the time and date the product is on sale as well as linking a variant price list to the channel		<p>The channel price list should be linked to the default sales plan</p> <p>Ensure a Channel price List has been created to link the channels to the variant price list on which prices have been entered.</p> <p>Ensure the channel price list dates are valid.</p> <p>A channel price list will need to be created for each Variant Price List – Channel combination created.</p>
Create the Voucher Bookable Product- This will control the cost of the Voucher and what channels the Voucher will be available via.		<p>Ensure the Bookable Product type selected is Voucher</p> <p>Ensure the Voucher Valid Days field has been entered with the number of days that the Voucher is available for</p> <p>Ensure a Category and Product Calendar have been entered</p> <p>Ensure the relevant channel check boxes are ticked</p> <p>Ensure a variant has been added</p> <p>Prices should be added to an active Variant Price List that has been linked to a Channel Price List.</p>
Create the Voucher Payment Method- Needed so that vouchers are accepted as a payment method for products purchased		<p>Ensure the payment type in the drop down list selected is Voucher (managed)</p> <p>Ensure the channels have been defined where the Voucher payment method is to be used</p>