CRM DRIVEN SOLUTIONS FOR SPORT & LEISURE

GREEN 4 TICKETING V3.7
DELIVERY OPTIONS, DELIVERY CHARGES AND ADDITIONAL CHARGES

THE QUEEN'S AWARDS
FOR ENTERPRISE:
2014

Microsoft Partner
Gold Independent Software Vendor (ISV)

CONTENTS

ABOUT THIS DOCUMENT

This document has been prepared as a User Guide for setting up Delivery Options, Delivery Charges and Additional Charges.

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DOCUMENT CONTROL

Version	Date	Change	Initials
V1.00	16/09/2014	Updated to include 3.7 Additional Charges functionality	CP/JW
V1.1	25/11/2014	Print at home delivery option section added	JW
V1.2	17/03/2015	Delivery option requirement section added and information on collecting/not collecting a delivery address when setting up a Delivery Option.	JW

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1. DELIVERY OPTIONS AND CHARGES
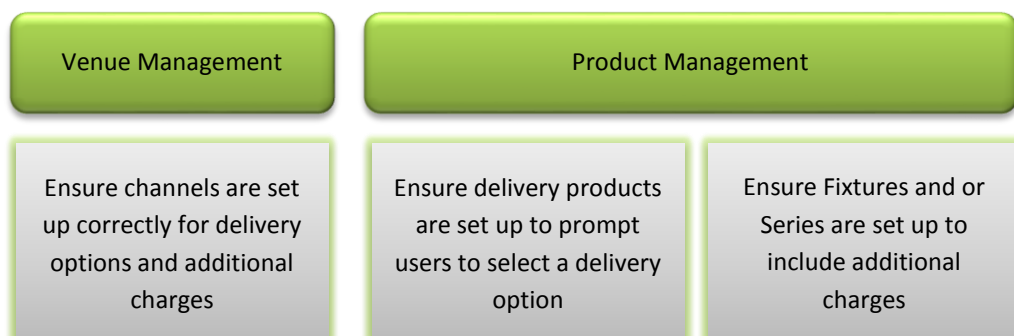
1.1. INTRODUCTION

The Green 4 Ticketing solution provides the ability for a system administrator to configure different delivery options and additional charges for bookings made on the system.

This functionality enables the system to cater for:

- The setup of different delivery options for bookings made e.g. postal delivery, print @ home, collections from the ticket office
- Using different addresses for delivery of a product to a customer i.e. more than one address can be set up for a contact
- Adding booking costs to a booking
- Adding additional charges to a ticket for a specific event

The set-up of delivery options and additional charges is primarily done in the channel where the bookings will be made. If charges are to be made for the delivery, delivery products need to be set up. If additional charges are to be added to tickets sold for a specific event, the event needs to be flagged.

This guide provides an overview of the following:

Venue Management	Product Management	
Ensure channels are set up correctly for delivery options and additional charges	Ensure delivery products are set up to prompt users to select a delivery option	Ensure Fixtures and or Series are set up to include additional charges

Note: Setting up of Channels and Delivery type products is not covered in this guide, an overview of what is required is provided. Refer to:

The Infrastructure Set Up User Guide for the setup of Channels

The Booking and Product Management User Guide for the setup of Products

1.2. SETTING UP DELIVERY OPTIONS

To set up delivery options for a channel and ensure that the end customer is prompted to select a delivery option complete the following steps:

a) In the Venue Management area, select **Channels**.

b) Open the channel where the delivery options are to be offered (POS is shown in this example)
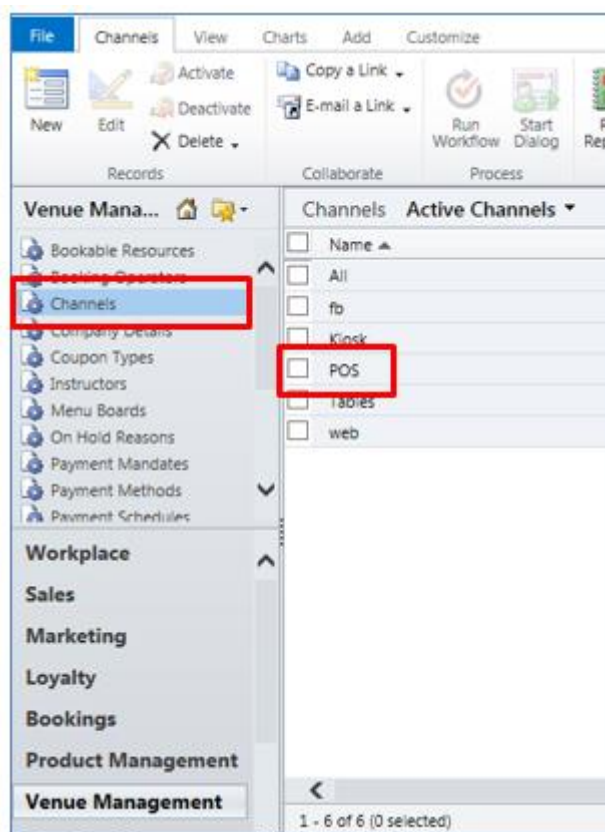
c) In the General section of the form, set the **Select Delivery Address** option to **Yes**.

d) Select **Save & Close**.

The **Select Delivery Address** option should also be set up in the Web channel. If the service of printing tickets at home is to be offered, the **Enable Print at Home** option should be selected in the Web channel.

1.3. SETTING UP DELIVERY PRODUCTS

Delivery products need to be set up for each type of delivery mechanism that will be offered, even if there is no charge for the delivery. If collection of tickets is being offered, then a collection product should be set up with a zero value. Delivery products should ideally be categorised as Delivery Options. Examples of delivery products are:

- Postage (£2.50)

- Collection (£0)

To set up a delivery product:

a)   In the Product Management area select **Bookable Products**

b)   Create a new bookable product of type **Delivery Option**. The example below shows a delivery option product called Collect @ Ticket Office.

c)   Select a category for this product if required.

d)   If VAT is to be charged, a VAT Code can be captured for the product.

e)   In the **Delivery Options** area of the form, there is an option to select if or not the Delivery Option being created requires a delivery address to be collected. For example, if creating a Delivery Option such as 'Collect @ Ticket Office' there would be no need for a delivery address to be collected, whereas a Delivery Option of 'Post' would require a delivery address to be collected. To set the above, complete the **Requires Delivery** flag in the Delivery Option Bookable product form:

- **Requires Delivery**. The field should be used when creating a Delivery Option type Bookable Product to indicate if a physical delivery is required for the delivery product and hence a delivery address is needed. Select **Yes** if a delivery address is required. Select **No** if a delivery address is not required.

Note. This functionality only applies to Bookable Product records which are type **Delivery Option**.

f) Put the product on sale on the appropriate channel.

g) Ensure that a price has been set up for the product.

h) In the POS and the Web, the Operator will be prompted to select a delivery option. An example of this in POS is shown below. The delivery charge would be added to the shopping basket as a separate item

1.4. DELIVERY OPTION REQUIREMENT

Not all products require delivery and therefore it is not always necessary for delivery information to be collected. Other products always require delivery or may need the option for delivery to take place. Functionality has been developed that prevents the need for a delivery option from being specified and contrastingly if delivery information does need to be specified. To set up this functionality, complete the following:

a) In the navigation bar select **Product Management** before choosing **Bookable Products**.

b) Find and open the **Bookable Product** form that either needs delivery information to be collected or does not need this option to occur.

c) With the Bookable Product form open, scroll down to the **Delivery Options** area of the form.

d) Complete the following:

- **Requires Delivery.** This field is used to determine whether the product requires a delivery option to be specified. Select **Yes** if a delivery option is required for the product. Select **No** if delivery is not required for this particular product. In the POS and Web if all the products in the shopping cart do not require delivery, then the delivery selection window in the POS and the delivery page in the Web will be skipped.

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

1.5. SETTING UP THE PRINT AT HOME DELIVERY PRODUCT

This section will assume that you have previously set up the following items:

- **Print Terminal.** Created for you by Green 4.

- **Web Terminal.** Created for you by Green 4.

- **Channels.** The Channels the product will be available via.

- **Sales Plan.** A default sales plan should have been created that is linked to the company details.

- **Variants Types.** The divisions of the product available. For Print at Home the variant type would be "each". See the Green 4 Ticketing Booking Product Management User Guide for how this is created.

- **Variant Price List.** The Variant Price List is selected in the Variant and Pricing section of the Bookable Product form, this being where the pricing of the product is entered into. The Variant Price Lists are also subsequently linked to the

channel using the channel price list entity. See the Green 4 Ticketing Booking Product Management User Guide for how a price list is created.

- **Venues and Venue Configurations.** See the Green 4 Venue Management User Guide for instructions on how to create a venue and venue configuration.

STEP 1: SET UP THE CHANNEL PRICE LISTS

Channel prices lists are used to link a variant price list to a channel. Multiple price lists can be in use simultaneously.

To set up a channel price list:

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

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

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

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

j) 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.

k) 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.

- **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 Print at home 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.

- **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.

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

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

STEP 2: CREATE THE PRINT AT HOME DELIVERY OPTION PRODUCT

A print at home Delivery Option must be created for printing at home to be available. To do this:

a)   Select **Product Management** before selecting **Bookable Products,** a list of all the current bookable products will be displayed.

b)   Select **New** in the ribbon, a new bookable product form will be displayed. Enter the following:

General

- **Name.** Enter a name for the bookable product. E.g. Print @Home.

- **Description.** Enter a description for the bookable product.

- **Type.** Select **DeliveryOption** from the drop down list.

- **Payable By.** If the option to print at home can be paid for using Direct Debit use the look up to select the Direct Debit Payment option.

- **VAT Code.** Use the look up to enter the appropriate VAT code.

- **Beneficiary Requirement**. Select **Not Required** from the drop down list.

Referring Entities

- **Category.** Use the lookup to select an appropriate category. e.g Delivery Options

  Delivery Options

- **Print at Home**. Select **Yes**

- **Requires Delivery.** Select **No**

⚠️ **Note.** All other fields do not need to be changed and can remain in their default positions.

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

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

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

- The channels that have been set up during the configuration on your system will be listed. Select the checkbox alongside each channel through which Print at Home will be available through, for example the Web.

- Select **Save** on the ribbon.

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

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

- To select a variant, in the drop-down list on the left hand side (highlighted below), select the appropriate option. All of the variants available in your system will be listed. If you have categorised the variants they will displayed in the relevant categories.

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

- Repeat until all variants are listed. If you need to remove a variant, click the red minus sign alongside the variant. Usually for Print at home only one variant has to be selected, this 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 Variant Price List selected must be the same one used in the Channel price List created previously:

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- 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.

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

STEP 3: SETTING PRINT AT HOME ON THE CHANNEL

For each Channel that the option to print at home is to be available on it is required for print at home to be enabled. The following process must be repeated for each channel that print at home is to be enabled upon.

a) Select **Venue Management** followed by **Channels.** A list of channels that have been created will be displayed.

b) Open up the channel by double clicking on it that the print at home functionality is to be enabled on.

c) Under the General section of the channel form, select the following:

- **Enable Print at Home.** Select **Yes**.

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

STEP 4: SETTING PRINT AT HOME FOR THE VENUE

For each Venue that the print at home functionality is to be available for, it is required that the Venue Configurations associated to the Venue allows for printing at home. How to do this is described below:

> **Note.** These steps will need to be repeated for each Venue Configuration that is to enable the print at home functionality.

a) Select **Venue Management** followed by **Venue**, a list of the venues that have been created will be displayed.

b) Double click on the Venue that the print at home functionality is to be enabled on. The Venue form will be displayed.

c) In the navigation bar of the Venue form select **Venue Configurations**.

d) The Venue Configurations that have been set up will be displayed. Open up the Venue Configuration by double clicking on it that print at home is to be allowed upon. The Venue Configuration form will open.

e) Ensure the following fields are complete:

- **Print Tickets for Venue.** Select **Yes.**

- **Allow Print at Home.** Select **Yes.**

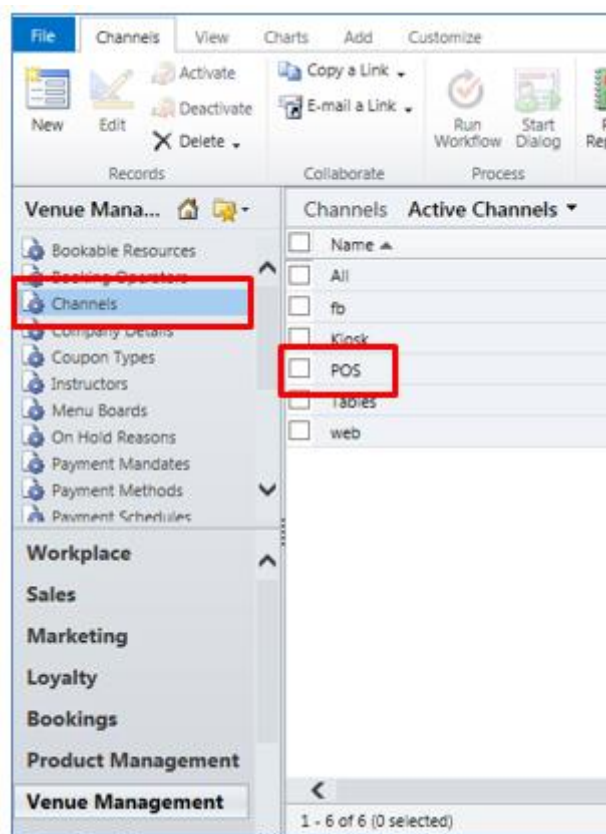f) Select **Save and Close** on the ribbon.

1.6. SETTING UP ADDITIONAL CHARGES

This facility enables you to set up additional charges that can be added to:

- A booking via the Payment Channel e.g. a fee can be added to the booking if a credit card is used as the payment method. Note this charge is applied per booking made;

- A ticket bought for a specific event that has been flagged for additional charges e.g. an event charge. Note: This charge is applied per ticket purchased.

TO SET UP THE CHANNEL FOR A BOOKING CHARGE

a) In the Venue Management area, select **Channels**.

b) Open the channel of interest (e.g. POS).

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c) Once the Channel form is open, select **Additional Charges** in the related items area.

d) On the ribbon select **Add New Additional Charge**.
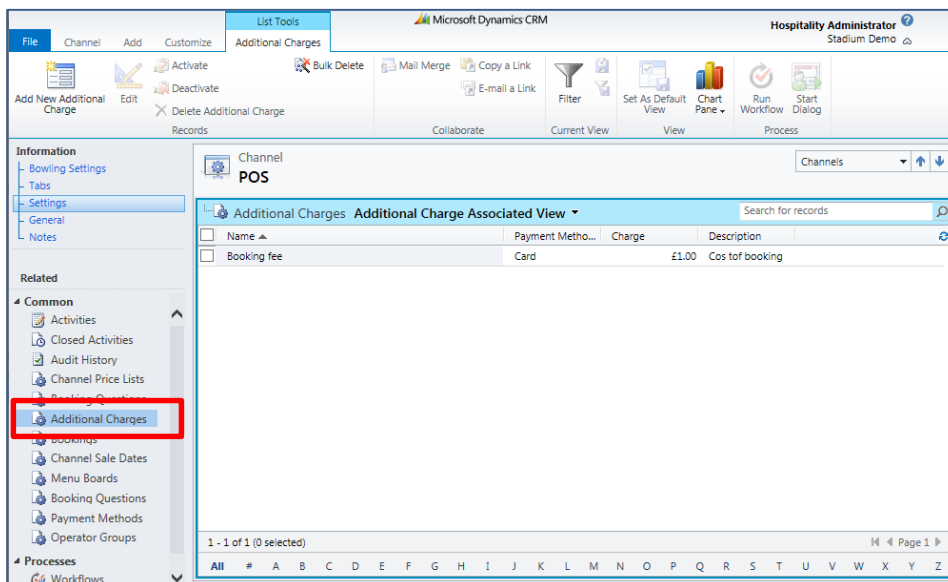
e) A blank form will be displayed.

f) Complete the following:

- **Name.** Enter the name of the charge e.g. booking fee

- **Channel.** Prefilled.

- **Description.** Enter a description of the charge.

- **Charge.** Enter the value of the charge.

- **Payment Method.** This field is optional, and can be set to the payment method used on the web.

g) Select **Save and Close**.

h) This additional charge will be added to the shopping cart. If the additional charge has been associated with a Payment Method, this will show up in the payment method dialogue.

TO SET UP AN EVENT (FIXTURE OR SERIES) FOR AN ADDITIONAL CHARGE

For a ticket purchased for a Fixture to incur the additional charge:

- The Additional Charge needs to be set up as above.

- Both the **Bookable Product** and the **Fixture** need to be flagged **Yes** to Ticket Booking Fee as shown below.

- For a ticket purchased for a Series to incur the additional charge, the **Bookable Product associated to the Series** needs to be flagged **Yes** to Ticket Booking Fee.

HOW ADDITIONAL CHARGES ARE DISPLAYED IN THE POS

The additional charge that has been applied to a payment method will be displayed in the POS shopping basket as shown below i.e. as a Channel Charge:

The additional charge that has been applied to a Series or Fixture will be displayed in the POS shopping basket as shown below i.e. as an Additional Charge:

2. USING MULTIPLE ADDRESSES

The channels that you have selected (For example POS and Web) can be configured to allow the use of multiple addresses for billing and delivery.

To enable the use of multiple addresses in the relevant channels carry out the following:

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

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

c)   Double-click over the appropriate channel. The details will be opened in the form view.

d)   Ensure the Select Delivery Address option is set to **Yes**.

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

2.1. ADDING MULTIPLE ADDRESSES IN POS

To add multiple addresses against a customer record in POS, carry out the following:

a)   From the Customer dialog a new **Addresses** tab will be available. From the addresses tab, the user can manage the customer's address details.

2.2. SELECT DELIVERY ADDRESS

When the customer makes a purchase through the POS, if the **Select Delivery Address** option has been set for the channel, the user will be prompted to select a delivery address for the customer when payment is added. Note, if a purchaser's details are not entered (skipped using the No Purchaser Reason drop-down) a delivery address will not be requested. Likewise, if the Speed Checkout option is used a delivery address will not be requested.