CRM 2015
RETAIL SETUP
USER GUIDE

green4 SOLUTIONS

THE QUEEN'S AWARDS FOR ENTERPRISE: 2014

CONTENTS

ABOUT THIS DOCUMENT

This document has been prepared as a User Guide for setting up and selling retail products in CRM 2015.

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DOCUMENT CONTROL

Version	Date	Change	Initials
V1.0	16/06/2015	This is a new document	JW
V1.1	13/10/2015	Change to the Picking and Dispatching process	JW

CONTACT

Any correspondence should be addressed to:

Product Development

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

Phone: +44 (0) 845 508 8149

Email: support@green4solutions.com

Web: www.green4solutions.com

INTRODUCTION

The Go Retail solution provides the ability for a system administrator to set up retail and merchandise products which can then be sold on different channels. In addition there is also other functionality available, such as Stock Handling, Picking and Dispatching

The table below summarises details of this document:

RETAIL

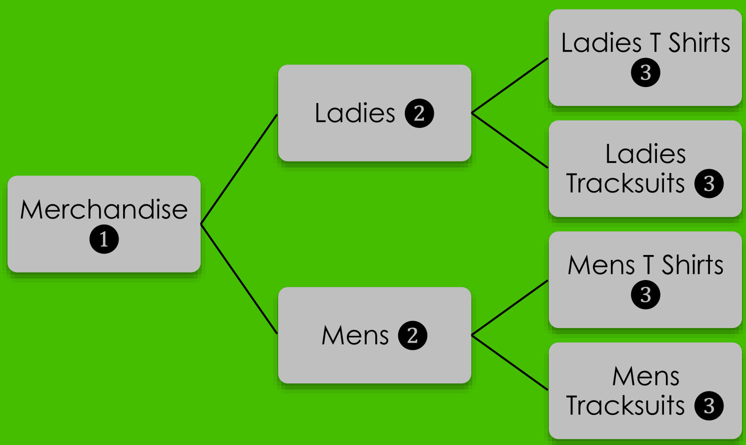
RETAIL SETUP

1. RETAIL CATEGORIES	2. RETAIL PRODUCTS	3. VAT CODES AND RATES	4. BOOKABLE PRODUCT MODIFIERS
Categories are used so that all retail products can be organised on the POS/Web in a logical manner. Depending on the product that is being sold, they can be within different categories. It is also possible to create a link so that when one category is selected on the POS/Web another Category opens, thus forming a chain.	Retail Products are created as Stock type Bookable Products. A Stock type Bookable Product should be created for each retail product that is to be sold on the system such as shirts, scarfs and any other accessories.	It is possible to add VAT to certain products that require it. This can be done by creating a VAT Code which has the relevant VAT rates attached. Typically in the UK a POS system will have at least two VAT Codes set up such as a Standard Rate and Zero Rate. The ability to add different VAT Rates also provides the ability to track changes over a period of time which may occur if there are changes in Government policy.	Bookable Product Modifiers can be set up within CRM to enable the selling of additional features that are related to a Bookable Product. For example, Product Modifiers of a name and number can be added when selling a shirt. There are different types of modifiers which allow the additional features to be added to a product in different ways such as types, Sting, Bool and Option.
5. ADDING IMAGES TO RETAIL PRODUCTS	**6. SETTING UP A BARCODE FOR A RETAIL PRODUCT**	**7. STOCK HANDLING**	**8. PICKING AND DISPATCHING**
Images can be added against each retail product that is being sold which can then be displayed on the Web. Go also allows images to be personalised when Product Modifiers are being used. For example this allows a customer to see how their shirt may look like once a name and number has been added to it.	A barcode can be added and configured against each retail product that is being sold in the system. This allows products to be scanned into the POS automatically adding them to the shopping cart.	Retail stock can be handled within CRM allowing stock levels to both increase (stock deliveries) and decrease (sales). It is possible within CRM to view the level of stock for each Product Variant to control when new deliveries of a product must be made.	A picking and dispatching process within CRM is designed to assist with orders that have been taken via the Web. The functionality is centred on the after sales process of picking the goods that have been sold on the web and dispatching them to a customer.

1. SETTING UP RETAIL CATEGORIES

In order to organise different retail products for sale in a logical manner, it is necessary to set up Categories. These are called **Analysis Categories** and each retail Bookable Product created in the system must have a Category attached to it. For example a category of Kit, Training wear and Accessories could be created and the different products within the relevant category.

Numerous levels of Analysis Categories can be set up to link the Web or POS to a certain product, the diagram below shows an example of the set up. Bookable products can also be added to each Category level if required.



When creating an Analysis Category, numerous categories can be linked together to create a chain, as displayed above. This can be done by adding a **Parent Category** in the Analysis Category form which provides the link. For example in the above demonstration, both the Ladies and Men's Analysis Category will have a Parent Category of Merchandise. The Ladies T-Shirt and Tracksuit will have a Parent Category of Ladies added and the Men's T Shirt and Tracksuit will have a Parent Category of Men's.

Although many Parent Categories can be added to an Analysis Category to create a chain, it is advised that they are kept as short and simple as possible to avoid complication.

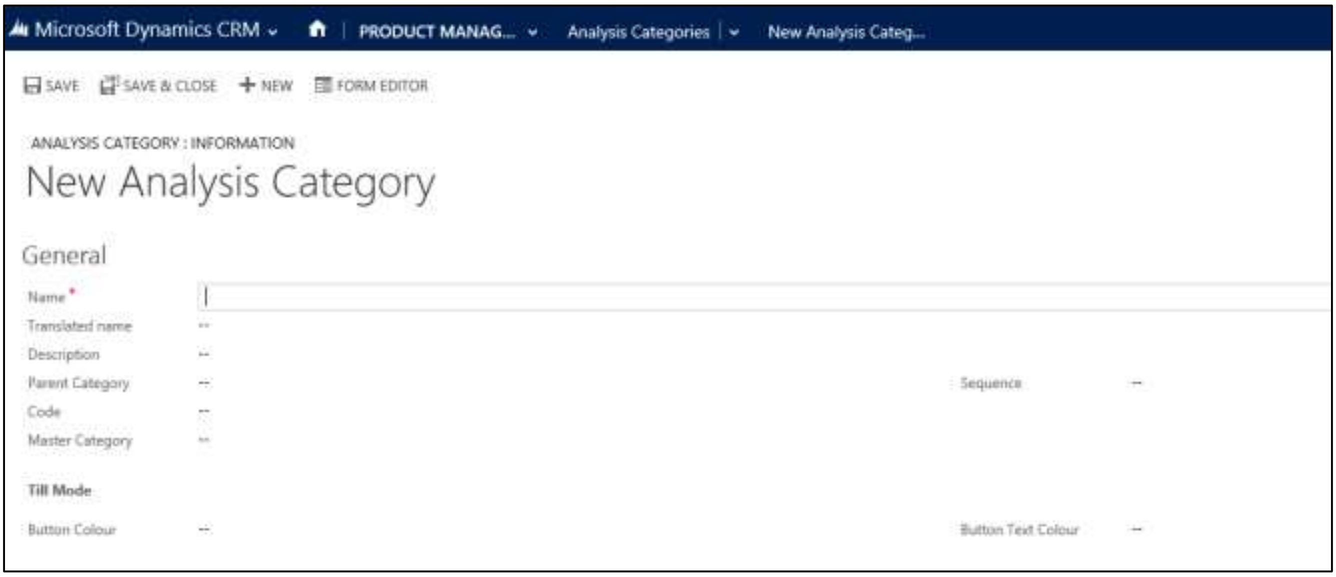
To create an Analysis Category, complete the following instructions:

a) Within CRM 2015, select or hover over the **Microsoft Dynamics CRM** tab and from the drop down choose, **Product Management.**

b) Select **Product Management** in the navigation bar and from the drop down select **Analysis Category.**

c) The Active Analysis Categories view will be shown, select **New** on the ribbon.

d) A new Analysis Categories form will be displayed. Complete the following details



- **Name.** Enter a name for the Category for example Merchandise, Ladies, Men's, Training or Kit etc.
- **Translated Name.** This field can be used for translated implementations if applicable.
- **Description.** Enter a description of the Category,
- **Parent Category.** If applicable use the magnifying glass to look up and select a Parent Category. This field can be used to link categories together in order to create a chain. See the diagram above and the comments beneath the diagram for more information.
- **Sequence.** If applicable enter a sequence number, this can be used to indicate the display order of the Categories.
- **Button Colour.** This field is often used for F&B Products when the terminal is placed in till mode. If applicable enter the Button Colour and all products that have this category will be displayed in the chosen colour in the POS.
- **Button Text Colour.** This field is often used for F&B Products when the terminal is placed in till mode. If applicable enter the Button Text Colour.

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

1.1. ADDING IMAGES TO CATEGORIES

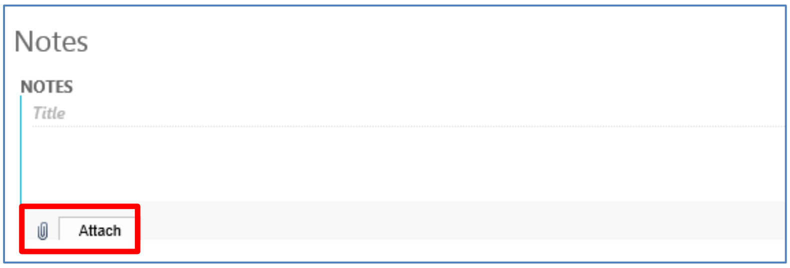
Images can be uploaded against Categories to facilitate the drill down through the Categories when purchasing via the Web. The example below shows, Replica Kit, Training, Accessories and Gift Experiences as separate Categories with an image inserted against them.

It is suggested that when images are uploaded for categories they are provided with a meaningful name that describes the Category and if applicable, the fact that it may be a drill down item to another level category.

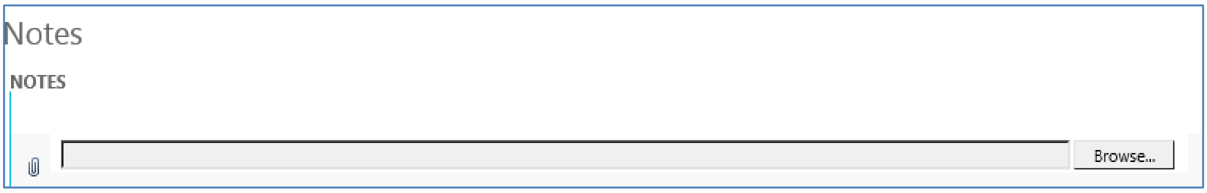
To add an image against the Category, complete the following instructions:

a) With the Category form open, scroll down to the **Notes** section of the form.

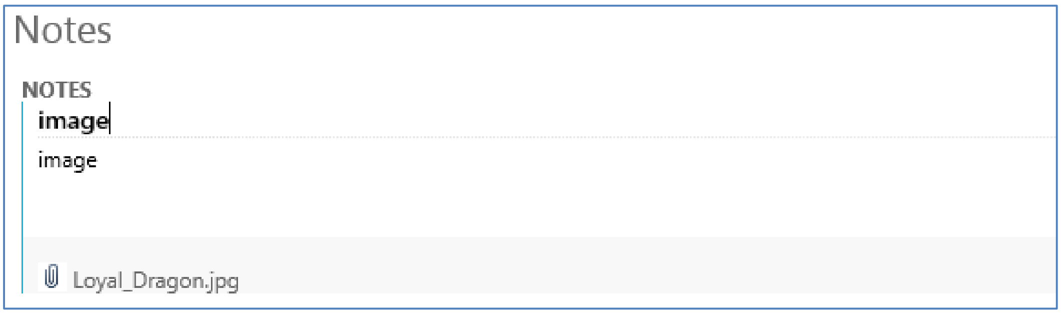
b) Click within the notes section, an Attach button will be displayed. Select **Attach**.



c) This will display a Browse button, select **Browse** and search for the Loyalty Reward Image that is to be used from your desktop.



d) Upon selecting the image, it will become attached to the notes section. Give the note a title of **image**, whilst also writing **image** beneath the title in the description area.



e) Select **Done** in the Notes area.

f) Once the details are complete select the Save icon in the bottom right hand corner of the screen.

2. SETTING UP RETAIL PRODUCTS

The sale of retail products relies upon a number of entities within the system, all of which must be correctly configured to ensure the product is placed on sale at the correct price. Retail products are set up within CRM as Stock type Bookable Products. The GO CRM 2015 Product Management User Guide gives in depth instructions on how a Stock type Bookable Product is created.

In order for the Stock type Bookable Product to appear on sale an appropriate Sales Plan type of Other with a linked Channel Price should have been created. Furthermore, a valid Variant Price List and Variants need creating beforehand. Information on each of these is given in the GO CRM 2015 Product Management User Guide.

The table below indicates the process that should be followed to place a Stock type Bookable Product on sale. For more detailed information on Stock type Bookable Products, please see the GO CRM 2015 Product Management User Guide.

Task	Comments
1. Create the **Variant Types**	Create the type of the Product that you can purchase. For example a Bookable Product that represents a piece of clothing may have Variant Types of Small, Medium and Large to represent the different sizes available, whereas an accessory such as a scarf usually has a Variant Type of Each.
2. Create the **Variant Price Lists**	The Variant Price List is selected in the Variant and Pricing section of the Bookable Product form, where the pricing of the product is entered. The Variant Price Lists are also subsequently linked to the Channel using the Channel Price List entity.
3. Create a **Channel Price List**	The Channel Price List should be linked to the Sales Plan type of Other. The Channel Price List should link the Channels to the Variant Price List which Prices have been entered. Ensure the Channel Price List dates are valid. A Channel Price List will need to be created for each Variant Price List – Channel combination created.
4. Create **a Stock type Bookable Product**	In the Bookable Product form, complete the following mandatory fields. Fields that are not listed below can be completed if additional functionality is required. For more information see the GO CRM Product Management User Guide: o **Name.** Enter a name for the product, e.g. Shirt, Shorts or Scarf. o **Type.** Use the drop-down list to select **Stock**. o **VAT Code.** If applicable use the magnifying glass to look up and select a VAT Code. o **Beneficiary Requirement.** Use the drop-down list to select if a customer's name is required when the product is purchased.

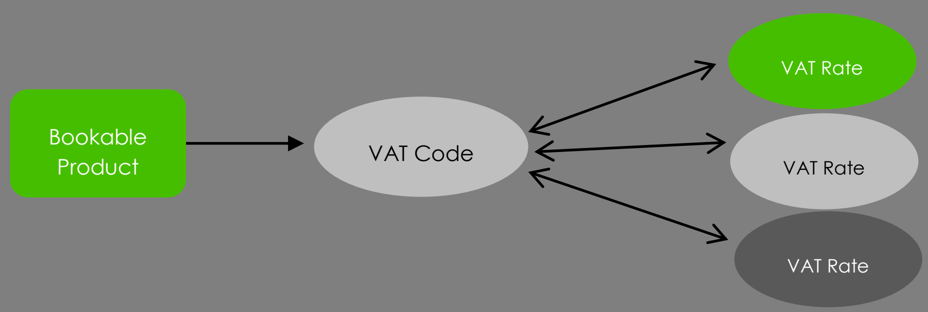
	Referring Entities: o **Category.** Use the Look Up Records dialog to select the product category. The category is used to group products, Select **Save** on the ribbon.
5. Assign the **Channels** to the Bookable Product	Place a tick in the Channels that the Product is to be sold.
6. Assign the **Variants** to the Bookable Product	Select the appropriate Variant(s) for the Bookable Product that is being created.
7. Select the **Variant Price List** and assign the prices to the Bookable Product	An active Variant Price List that is part of a valid Channel price List should be selected from the drop down. The prices of the product should then be assigned.

3. BOOKABLE PRODUCT VAT CODES AND VAT RATES

For each Bookable Product set up in the system, a VAT code and associated VAT rate can be associated to the product.

This section describes how to set up **VAT codes** and **VAT rates**.

The relationship between a bookable product and the VAT code and rates is shown below.



- A Bookable Product can be associated with one **VAT code.**
- A **VAT code** can be associated with one or more **VAT rates.**
- A **VAT rate** can only be associated with one **VAT code.**

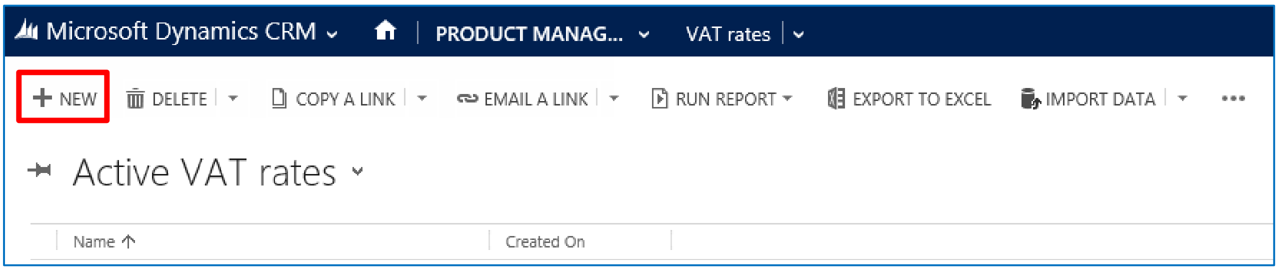
Typically a POS system will have at least two VAT Codes set up, e.g. a Standard Rate and Zero Rate, although there could be more depending on how VAT is charged within local environments. The ability to add different VAT Rates provides the ability to track changes to VAT rates over a period of time which may occur if there are changes in Government policy. The latest tax rate associated with a tax code will be the ‘current’ rate of tax to use.

3.1. CREATING A VAT RATE

a) Within CRM 2015, select or hover over the **Microsoft Dynamics CRM** tab and from the drop down choose, **Product Management.**

b) Select **Product Management** in the navigation bar and from the drop down scroll across before choosing **VAT Rate.**

c) The Active VAT rates view will be displayed, select **New** on the ribbon.



d) A New VAT rate form will be displayed, complete the following details:

- **Name.** Enter a name for the VAT rate.
- **Percentage.** Enter the percentage of VAT that will be applied.
- **Start date.** Capture the Start date for when this VAT rate will be applied.
- **End date.** Capture the end date for when this VAT rate will be applied. If the VAT Rate is current, the End date should be left blank.

e) Select **Save and close** in the ribbon. The VAT Rates entered need to be associated with the VAT Code which can then be added to any Bookable Products.

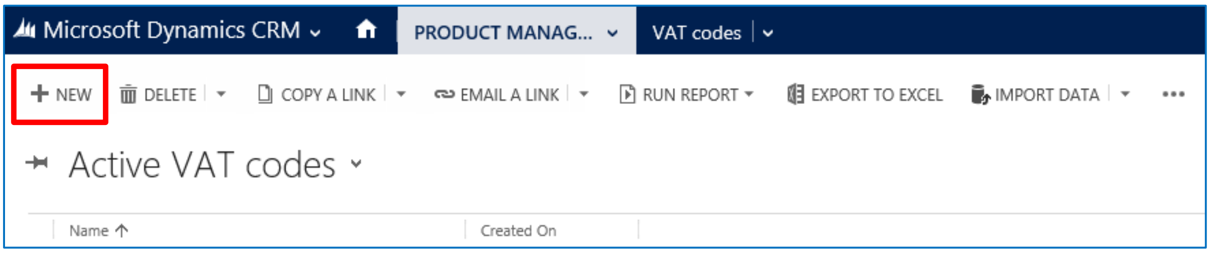
3.2. CREATING A VAT CODE AND ASSOCIATING THE VAT RATE

To set up a VAT Code and associated VAT Rate in CRM complete the following instructions:

a) Within CRM 2015, select or hover over the **Microsoft Dynamics CRM** tab and from the drop down choose, **Product Management.**

f) Select **Product Management** in the navigation bar and from the drop down scroll across before choosing **VAT Code.**

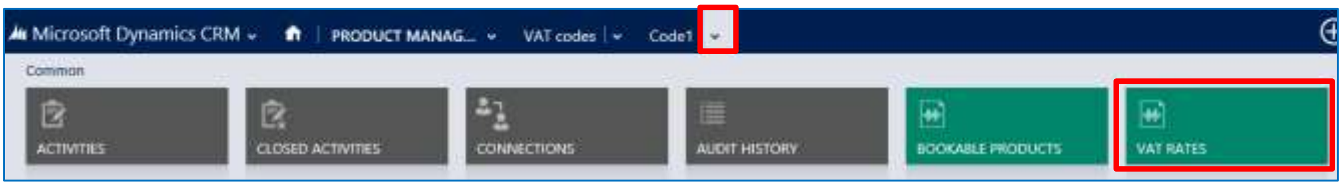
g) The Active VAT Codes view will be displayed, select **New** in the ribbon.



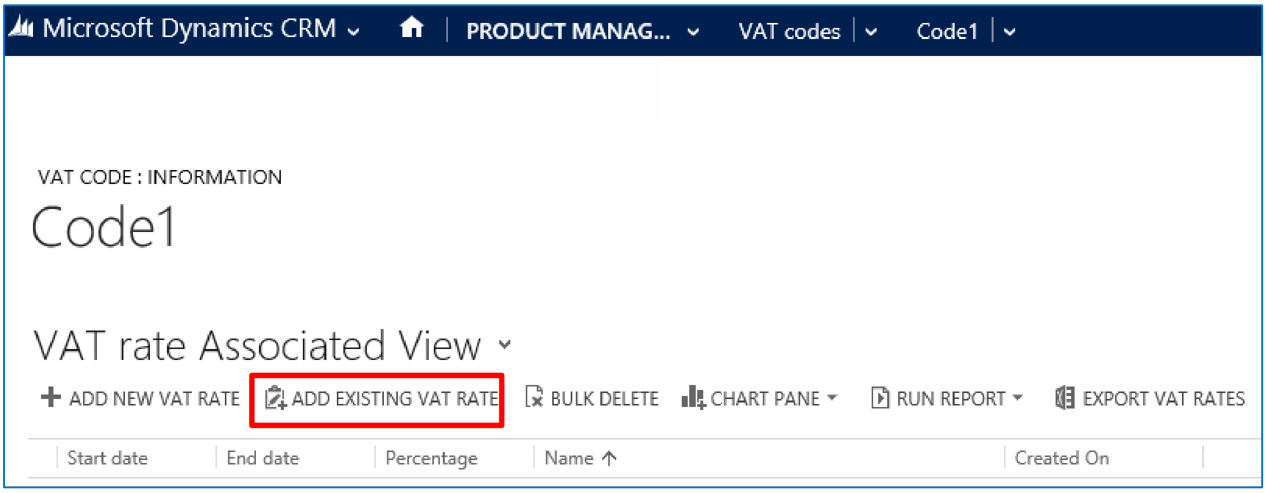
h) A New VAT code form will be displayed, complete the following detail:

- Name. Capture the name of the VAT Code
- Owner. This field will be automatically completed.

i) Select **Save** on the ribbon. The VAT Code entered needs to be associated with the VAT Rate, to do this select the small arrow next to the name of the VAT Code and from the drop down choose VAT Rates



j) The VAT rate Associated View will be displayed, select **Add Existing VAT Rate** on the ribbon.



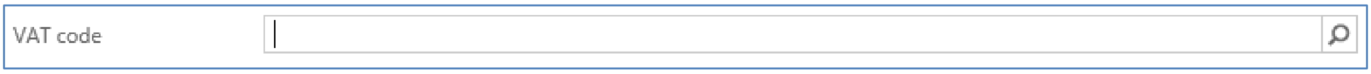
k) A drop down will appear, use the magnifying glass to look up the VAT Rate created in the previous step. If the relevant VAT Rate is not shown, select Look Up More Records in the drop down where it will be possible to extend the search for the VAT Rate.

l) Upon finding the VAT Rate, select it and it will appear in the VAT rate Associated View.

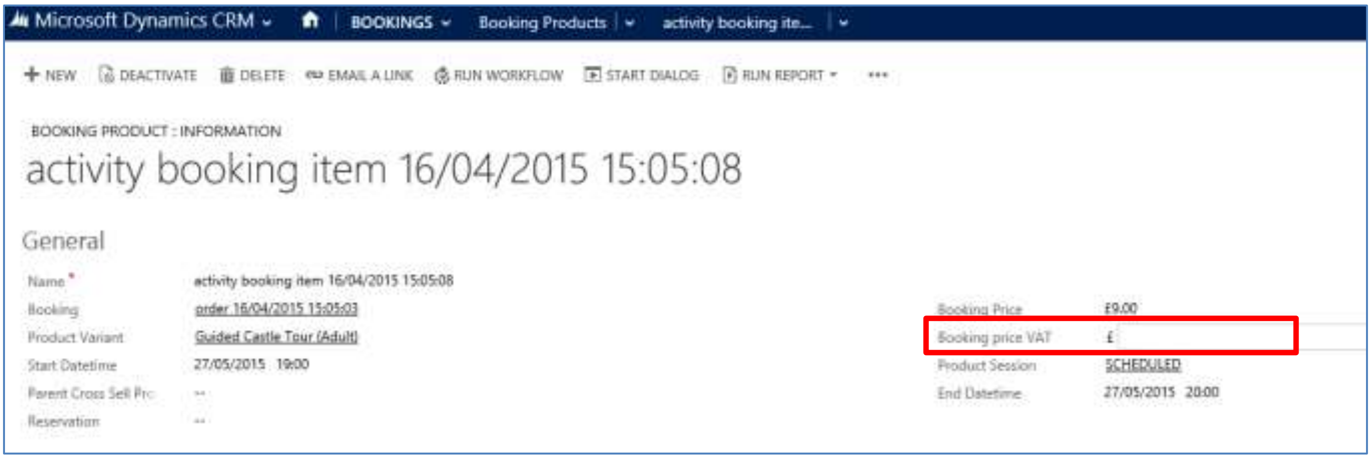
m) Select the Save icon in the bottom right hand corner of the screen.

3.3. APPLYING THE VAT CODE

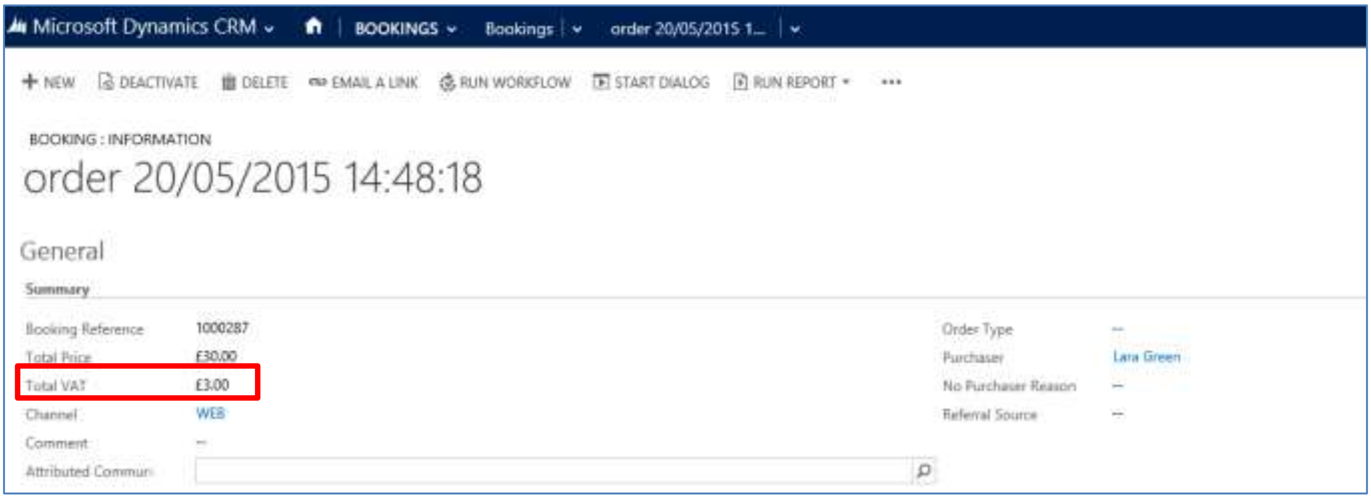
The applicable VAT Code should be captured against the Bookable Product as described in the section 2 Setting up Retail Products. The current VAT Rate, based on the start and end dates, associated with that VAT Code will be applied to the Bookable Product.



Whenever a Bookable Product is sold that has a VAT code linked to it, during post-payment processing, a VAT figure is calculated (based upon the current Rate of tax). The figure is stored in the **Booking Product** form. Within the Booking Product form the field **Booking price VAT**, will show any VAT that has been paid as part of the booking.



A **Total VAT** amount is also recorded for each product sold and is shown in the **Total VAT** field of the **Booking** form within CRM.



4. BOOKABLE PRODUCT MODIFIERS

Product modifiers can be set up in CRM to enable the selling of additional features related to a Bookable Product. For example, if a club shirt is put on sale modifiers can be setup which will prompt the POS Operator or Web end customer to have a name, number or badge included with the shirt sale. These extra features are classed as Product Modifiers within CRM. A Bookable Product can have zero, one or many Product Modifiers.

Modifiers come in a number of 'Types', and depending how each modifier is set up, this will have an effect on how the modifier is presented to the POS Operator or end customer.

STEP 1. CREATE THE RETAIL PRODUCT

Firstly, the product that the Bookable Product Modifiers are to be added to must be created. In this example this is the Home Shirt, and the Product Modifiers of; Number, Name and Badge will be added.

The same process which is shown in Section 2 of this document; Setting up Retail Products, must be followed to create the Retail Product. If the retail Bookable Product that the Product Modifiers are to be added to have already been created, this step can be skipped and the Product Modifiers can be created as Bookable Products.

EXAMPLE OF RETAIL BOOKABLE PRODUCT RECORD CREATED

The table below shows the fields that have been completed for a retail Bookable Product which Product Modifiers are then added to. This example has been created as use for this document.

Record Type	Name	Type	Beneficiary Requirement	Category	Channel	Variant	Variant Price List	Price
Bookable Product	Home Shirt	Stock	Not Required	Home Kit	POS Web	Each	Extra Large Large Medium Small	40.00

STEP 2. CREATE THE PRODUCT MODIFIERS AS BOOKABLE PRODUCTS

To set up a Product Modifier in CRM you must create a new **Bookable Product** to represent the additional feature of the product. For example, if there is to be the option to add Shirt Names, Numbers or badges to a shirt, a Bookable Product would have to be created for each of these.

Bookable Product Modifiers should be created as Stock type Bookable Products and a more detailed description of setting these up can be found in the GO CRM 2015 Product Management User Guide.

The table below indicates the process that should be followed to place a Stock type Bookable Product on sale. For more detailed information on Stock type Bookable Products, please see the GO CRM 2015 Product Management User Guide.

Task	Comments
1. Create the **Variant Types**	Create the type of the Product that you can purchase. For example a Bookable Product that represents a Name, Number or Badge, usually has a Variant Type of 'Each'.
2. Create the **Variant Price Lists**	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. The Variant Price Lists are also subsequently linked to the Channel using the Channel Price List entity.
3. Create a **Channel Price List**	The Channel Price List should be linked to the Sales Plan type of Other. The Channel Price List should link the Channels to the Variant Price List on which Prices have been entered. Ensure the Channel Price List dates are valid. A Channel Price List will need to be created for each Variant Price List – Channel combination created.
4. Create **a Stock type Bookable Product**	In the Bookable Product form, complete the following mandatory fields. Fields that are not listed below can be completed if additional functionality is required. For more information see the GO CRM Product Management User Guide: o **Name.** Enter a name for the product, e.g. Shirt, Shorts or Scarf. o **Type.** Use the drop-down list to select **Stock**. o **VAT Code**. If applicable use the magnifying glass to look up and select a VAT Code. o **Beneficiary Requirement.** Use the drop-down list to select if a customer's name is required when the product is purchased. Referring Entities: o **Category.** Use the Look Up Records dialog to select the product category. The category is used to group products, Select **Save** on the ribbon.
5. Assign the **Variants** to the Bookable Product	Select the appropriate Variant(s) for the Bookable Product that is being created.

6. Select the **Variant Price List** and assign the prices to the Bookable Product	An active Variant Price List that is part of a valid Channel price List should be selected from the drop down. The prices of the product should then be assigned. **Note:** Flag the product variant as **Not for sale** if you do not want to sell the modifiers associated Bookable Product as a separate item.

EXAMPLE OF PRODUCT MODIFIERS AS BOOKABLE PRODUCT RECORDS CREATED

The below table shows the fields that have been completed in a number of Bookable Product forms to represent the Product Modifiers. This example has been created as use for this document.

Record Type	Name	Type	Beneficiary Requirement	Category	Channel	Variant	Variant Price List	Price
Bookable Product	Shirt Number	Stock	Not Required	Replica Kit	N/A	Each	Retail	7.50
Bookable Product	Shirt Name	Stock	Not Required	Replica Kit	N/A	Each	Retail	10.00
Bookable Product	Badge	Stock	Not Required	Replica Kit	N/A	Each	Retail	5.00

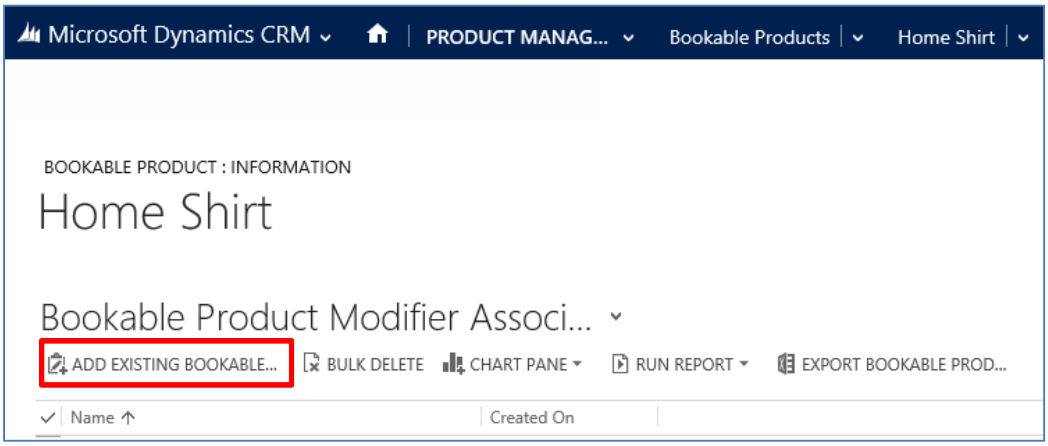
STEP 3. CREATE THE BOOKABLE PRODUCT MODIFIERS

Upon creating the Retail Product and the Product Modifiers as Bookable Products, it is now possible to create the Bookable Product Modifiers. This is completed by adding the Product Modifiers to the retail product that was previously created in Step 1.

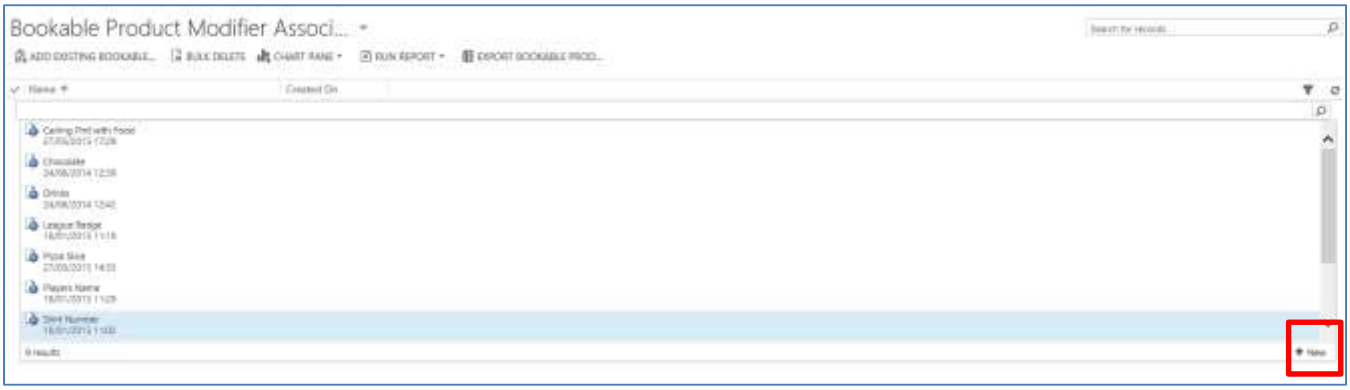
To create a Bookable Product Modifier, complete the following instructions:

a) With the Bookable Product form that the Product Modifier is to be connected to open, for example a Home Shirt, select the small arrow on the navigation bar next to the name of the Bookable Product. From the drop down, scroll across and select **Bookable Product Modifiers.**

b) The Bookable Product Modifier Associated View will be displayed, select **Add Existing Bookable Product Modifier** on the ribbon.



c) A drop down will appear, select the magnifying glass and choose **New** from another drop down.



d) A New Bookable Product Modifier form will be displayed, depending on the Type of Product Modifier that is to be created different fields must be completed. The different types of Bookable Product Modifier for retail products are:

- **String.** The type **String** can be used if the product modifier has a number of types you can select from. For example this could be used if a Player's Name can be added to the back of a shirt. String type makes it possible to add multiple names allowing the end customer the ability to make a selection.

Additionally type **String** allows a customisable option to be chosen. This allows the POS operator or Web user to enter their own wording into the POS or Web. This can be used when individuals would like to personalise their shirt themselves, by, for example entering their own name.

- **Bool.** The type **Bool** can be used if the Product Modifier does not have differing types and is either selected or not. For example this could be used as a Product Modifier of a Badge. The POS operator or Web user can select either to include a Badge on their shirt or leave unselected, so that this is not added.
- **Option.** The type Option will have an associated list of Option Variants which will be presented to the end customer for selection. An example would be if a different type of badge was being added to a shirt; a standard badge, 100th anniversary badge or special commemorative badge. Note: All Options offered need to be set up as Bookable Products and will have an associated list of Option Variants that will be presented to the end customer to select.

STRING TYPE BOOKABLE PRODUCT MODIFIER

To create a String type Bookable Product Modifier, the following details must be completed within the Bookable Product Modifier form. Any fields not described do not need to be completed for this Product Modifier type.

- **Name.** Capture a name for the modifier e.g. Shirt Name.
- **Product.** A Product Modifier must have its own associated Bookable Product and Product Variant set up as invariably a modifier will be sold for a price. Use the Look Up to select the Bookable Product that was created to represent the Product Modifier. These were created in Step 2, for example Shirt Name, Shirt Number etc.
- **Is Required.** If the Product Modifier is always to be sold with an associated Bookable Product, the **Yes** option should be selected. If the modifier will be offered as an Optional Extra with the sale of the product, the **No** option should be selected.
- **Modifier Options.** If the modifier type String has been selected, the options that will be presented to the end customer should be entered here. For example a list of names to be printed on the shirt can be set up as shown below. The names should be separated with a ' | ' separator.

- **Validation expression.** If the product modifier type String is selected, this field can be used to enter a REGEX or Regular Expression. For example, if a number is to be entered, the expression ^[a-zA-Z]{1,10}$ can be entered to ensure that numbers between 1 and 10 are entered.
- **Owner.** This field will be automatically completed.
- **Type.** Select String.
- **Default Value**. If applicable, enter a value in the field that will be displayed on the Web or POS before any other.
- **Allow custom option.** If this option is set to **Yes** for a String type modifier, then the end customer will be able to enter their own value instead of selecting from the list of modifier options provided. If this option is set to **No**, only the list of names entered in the modifier options field will be displayed and the end customer will not be able to capture their own value. This should be set to **Yes** if an operator or end customer can enter any name in order for example to personalise a shirt.

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

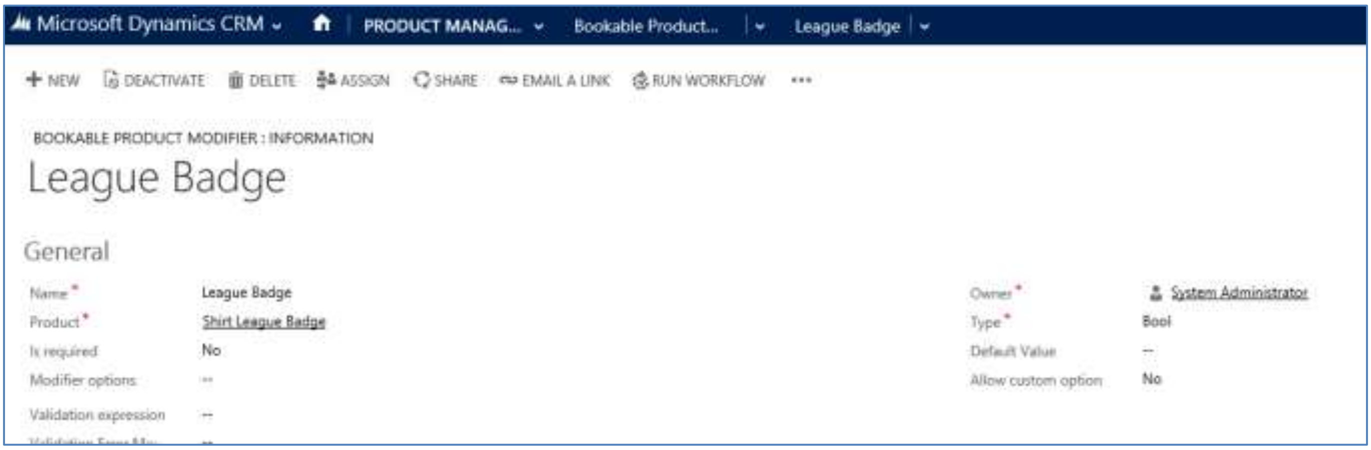
EXAMPLE OF STRING TYPE BOOKABLE PRODUCT MODIFIERS

The below table shows the fields that have been completed to create a String type Bookable Product Modifier for a Shirt Name and Shirt Number. This example has been created as use for this document.

Record Type	Name	Product	Is required	Modifier Options	Validation expression	Type	Allow Custom Option
Bookable Product Modifier	Shirt Number	Shirt Number	No	1|2|3|4|5|6|7|8|9	^[a-zA-Z]{1,10}$	String	Yes
Bookable Product Modifier	Shirt Name	Shirt Name	No	Medland|Smith|Messi	^[a-zA-Z]{1,10}$	String	Yes

BOOL TYPE BOOKABLE PRODUCT MODIFIER

To create a Bool type Bookable Product Modifier, the following details must be completed within the Bookable Product Modifier form. Any fields not described do not need to be completed for this Product Modifier type.



- **Name.** Capture a name for the modifier e.g. Badge
- **Product.** A Product Modifier must have its own associated Bookable Product and Product Variant set up as invariably a modifier will be sold for a price. Use the Look Up to select the Bookable Product that was created to represent the Product Modifier. These were created in Step 2, for example Badge.
- **Is Required.** If the Product Modifier is always to be sold with an associated Bookable Product, the **Yes** option should be selected. If the modifier will be offered as an Optional Extra with the sale of the product, the **No** option should be selected.
- **Owner.** This field will be automatically completed.
- **Type.** Select **Bool.**
- **Allow Custom Option.** Select **No.**

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

EXAMPLE OF A BOOL TYPE BOOKABLE PRODUCT MODIFIER

The below table shows the fields that have been completed to create a Bool type Bookable Product Modifier for a Badge. This example has been created as use for this document

Record Type	Name	Product	Is required	Type	Allow Custom Option
Bookable Product Modifier	Badge	Badge	No	Bool	No

OPTION TYPE BOOKABLE PRODUCT MODIFIER

To create an Option type Bookable Product Modifier, the following details must be completed within the Bookable Product Modifier form. Any fields not described do not need to be completed for this Product Modifier type.

- **Name.** Capture a name for the modifier e.g.
- **Product.** A Product Modifier must have its own associated Bookable Product and Product Variant set up as invariably a modifier will be sold for a price. Use the Look Up to select the Bookable Product that was created to represent the Product Modifier. These were created in Step 2, for example badge etc.
- **Is Required.** If the Product Modifier is always to be sold with an associated Bookable Product, the **Yes** option should be selected. If the modifier will be offered as an Optional Extra with the sale of the product, the **No** option should be selected.
- **Owner.** This field will be automatically completed.
- **Type.** Select Options.
- **Allow Custom Option.** Select **No.**

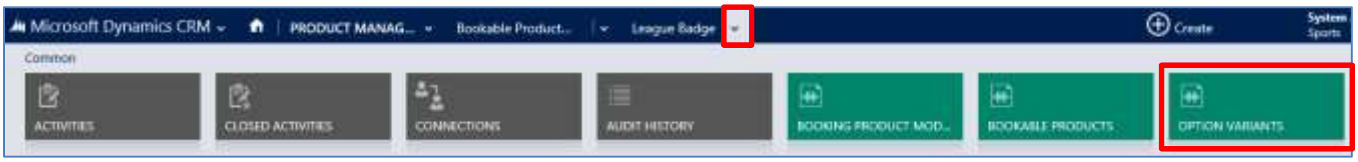
Select **Save** on the ribbon.

Option type Bookable Product Modifiers require Option Variants to be added to the Product Modifier, these represent the options that will be offered to the customer that they can add to their product, for example a particular type of badge on their shirt.

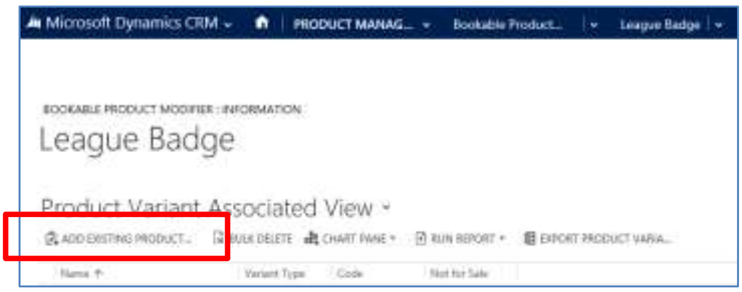
It must be noted that these Options should have been created as Stock type Bookable Products in the exact same way as Retail Products in step 1. For example a Bookable Product must have been created to represent the Standard Badge, 100th Anniversary Badge or Special Commemorative Badge.

To create and add the Option Variants, complete the following instruction:

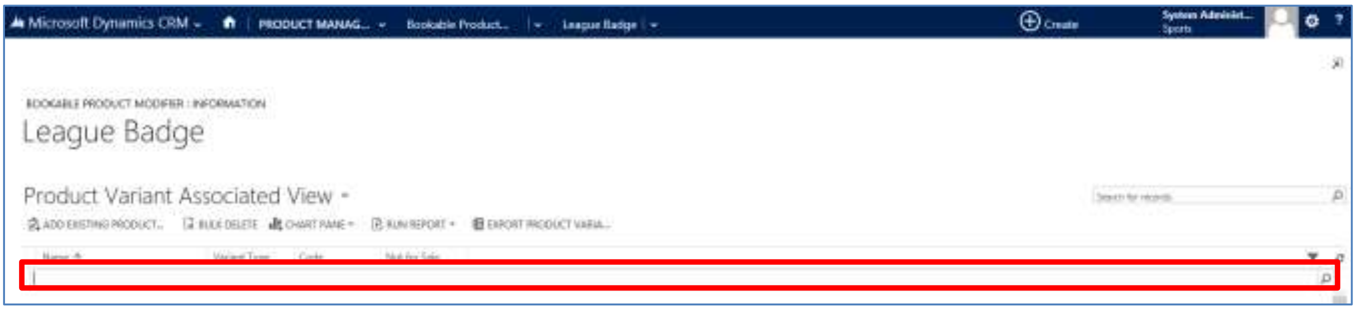
a) With the Option type Bookable Product Modifier form open, select the small arrow next to the name of the Product Modifier on the navigation bar. From the drop down, select **Option Variants.**



b) The Product Variant Associated View will be displayed, select **Add Existing Product Variant** on the ribbon.



c) A drop down will appear, select the magnifying glass to look up and find the Product Variants which are the Options that can be selected. For example Standard Badge (Each), 100th Anniversary Badge (Each) and Special Commemorative Badge (Each).



d) The Product Variants will be shown in the Product Variant Associated View once they have been added. Upon adding all the Option Variants, select the Save icon in the bottom right hand corner of the screen.

EXAMPLE OF AN OPTION TYPE BOOKABLE PRODUCT MODIFIER AND OPTION VARIANTS

The below table shows the fields that have been completed to create an Option type Bookable Product Modifier. Linked to the Option type Bookable Product are a number of Option Variants. This example has been created to use in this document

Record Type	Name	Product	Is required	Type	Allow Custom Option	Option Variants Linked
Bookable Product Modifier	League Badge	League Badge	No	Option	No	Standard Badge (Each) 100th Anniversary Badge (Each) Special Commemorative Badge (Each)

5. ADDING IMAGES TO RETAIL PRODUCTS

Images can be added against Retail products, which will then be displayed on the web. It is also possible for images to be personalised, so for example, a shirt name or number is added as a product modifier this is shown on the image of the shirt.

CRM will always upload the images in square format (e.g. 600px by 600px) so if you don't want your images to be stretched, please amend your image size to a square before uploading.

It is recommended that a naming convention is applied to the retail images uploaded to facilitate the management and update of images. Ensure that the name of the image describes the product as well as the front or back of the image if both are to be uploaded.

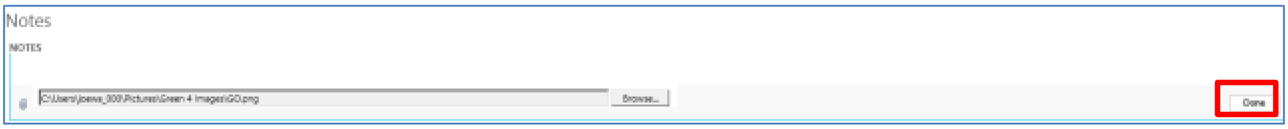
5.1. ADDING AN IMAGE

To add an image or images of the retail product that will be displayed on the web, complete the following instructions:

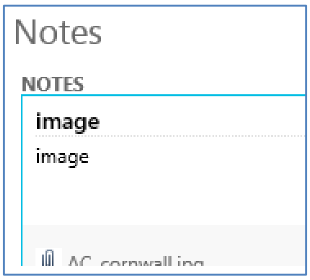
a) With the retail Bookable Product form open, scroll down to the **Notes** section of the Bookable Product form.

b) Click within the notes section and select the **Attach** button before choosing **Browse** to search for the image file before selecting it.

c) Upon finding and opening the image, select **Done.**



d) When the image has been attached, select the notes area and add a title called **image** before again writing **image** in the note area, as is shown below.

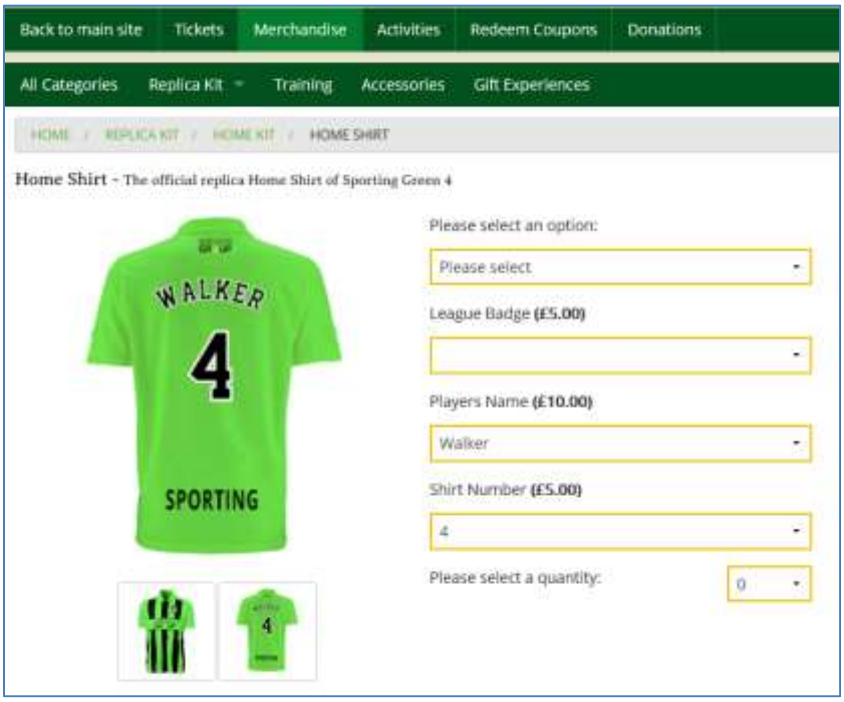


e) Select the **Save** icon in the bottom right hand corner of the Bookable Product form.

5.2. PERSONALISED IMAGES

Bookable Product Modifiers can be used to personalise items, such as adding a name and number to the back of a shirt. It is possible to show this personalisation on the Web in 'real time', so that when a name or number is added to the shirt this will show what the product will look like once the name and number have been printed.

In the example below two images have been added to the Bookable Product to be displayed on the Web, one for the front of the shirt and one for the back of the shirt. This is done by following the instructions in Step 5.1 Adding an Image.



To enable a product to be personalised the Bookable Product, for example a Home Shirt, must have Bookable Product Modifiers connected to it. To create the Bookable Product Modifiers and connect them to the Bookable Product, follow the instructions given in section 4. Bookable Product Modifiers.

To display the chosen name and number on the back of the shirt for the customer to view before making the purchase, an html extract should be included above the image of the shirt in the **Notes** section.

If there are two images, for example the front and back of the shirt the html extract only needs to be added above the image that is to be personalised. If each image is to be personalised then the html extract will need to be added above each of the images.

In the above example of a Home Shirt, only the reverse of the shirt is personalised, therefore the html has only been added above the Retail_HomeShirtBack.jpg image.

The html that should be added to personalise the image is shown below. The different parts of the extract will need to be changed depending on the Bookable Product Modifier that is being used and what the personalisation is to look like

The html extract is as follows:

<text>

<item text="Shirt-Number" x="500" y="450" font="Superstar M54" size="200" opacity="255" pen="Black" width="2" brush="White"/>

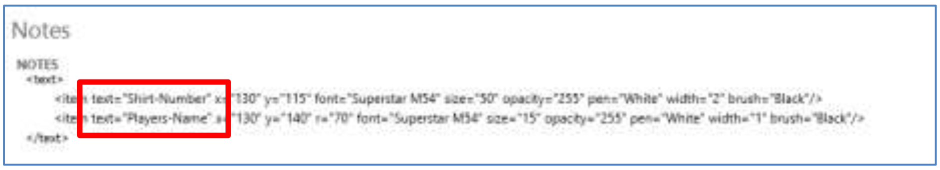
</text>

The html extract text must be changed for each Bookable Product Modifier that is used to display the personalisation of the product on the web. Each part of the html extract controls different aspects of the personalisation.

Each part of the above html extract is displayed in the table below with a definition of what it is controlling:

Part of HTML extract	Definition
<item text="Shirt-Number"	The item text refers to the Bookable Product Modifier. The name in brackets, in this example "Shirt-Number" is changed to the name of the Bookable Product Modifier. If the Bookable Product Modifier has two words, a hyphen must be used between the words. For example if the html was for the Shirt Name Bookable Product Modifier, you would enter <item text="Players-Name"
x="500"	The x="500" is a value that can change the position of the product modifier on the image. The number in brackets, in this example "500" can be changed to position a product modifier elsewhere on the image, for example a Name or Number on a shirt.
y="450"	The y="450" is a value that can change the position of the product modifier on the image. The number in brackets, in this example "450" can be changed to position a product modifier elsewhere on the image, for example a Name or Number on a shirt.
font="Superstar M54"	The font text refers to the font that is going to be used on the web personalisation. The font in this example is "Superstar M54" and can be changed to a different font if required.
size="200"	The size text refers to the size of the product modifier for example, the size of a number or name on a shirt. The size in this example is "200" and can be changed to make the modifier larger or smaller.
opacity="255"	The opacity text refers to the transparency of the image. The opacity in this example is "255" and can be changed to make the image more or less transparent.
pen="Black"	The pen text refers to the colour of the outline of the image. The pen in this example is "Black" but can be changed to another colour if required.
width="2"	The width text refers to the width of the image. The width in this example is "2" but can be changed to increase or decrease the width.
brush="White"/>	The brush text refers to the background colour that is displayed behind the image. The brush in this example is "White" but this can be changed if another background colour is required.

Each Product Modifier that is to be used to personalise the product must have a separate html extract. Shown below is the example of a home shirt which has two bookable product modifiers for the reverse image. One for the Shirt Number and one for the Players' Name.

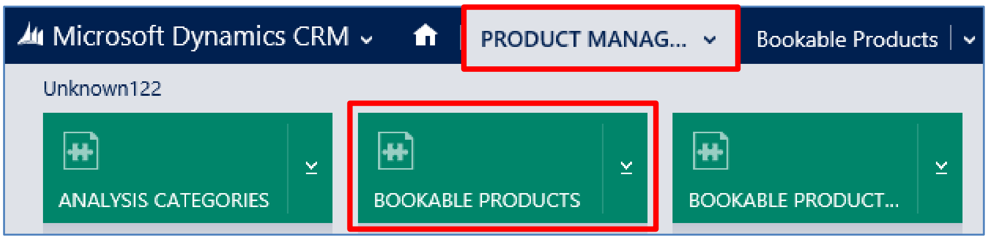


6. SETTING UP A BARCODE FOR A RETAIL PRODUCT

If the terminal being used to sell retail products has been set up for scanning, then it is possible to scan products from the POS. This means that when a product is scanned it will automatically be added to the shopping basket area of the POS. To set up a barcode for a product in CRM complete the following instructions:

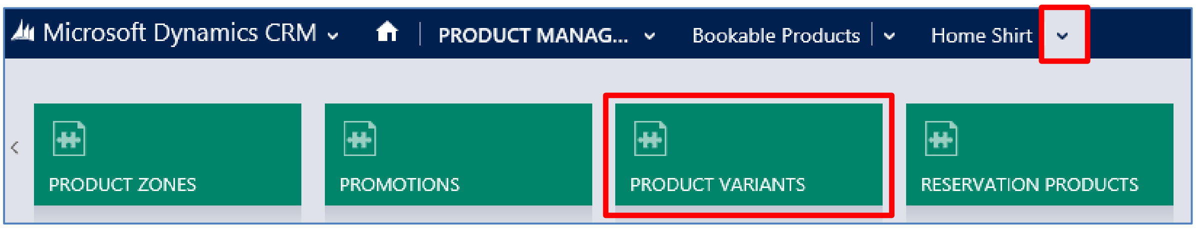
a) Select or hover over the **Microsoft Dynamics CRM** tab before scrolling across the drop down list of the navigation bar and selecting **Product Management**.

b) Next, in the Product Management area of CRM, select the **Product Management** tab before selecting **Bookable Products** from the drop down.

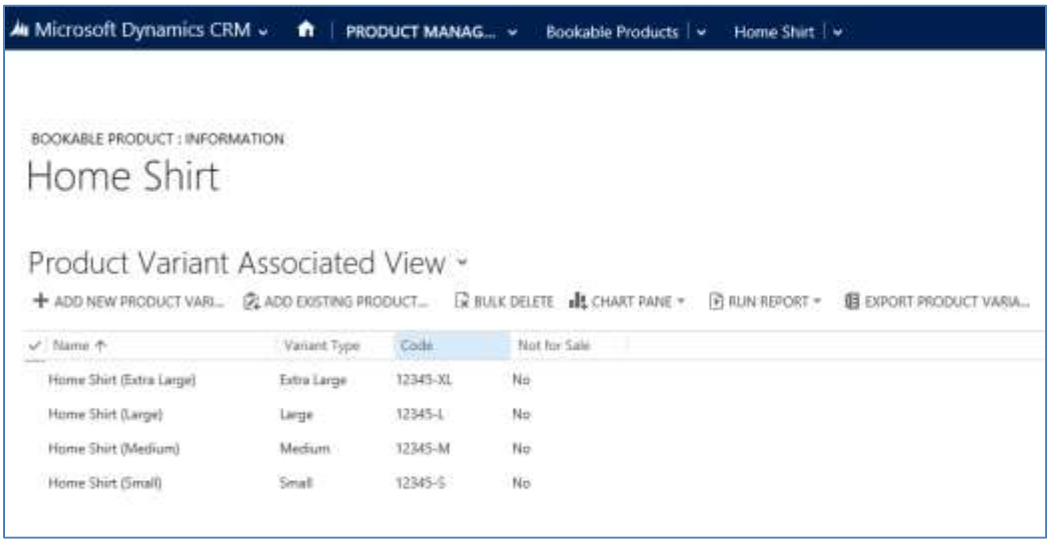


c) The Active Bookable Product view will be displayed, find and select the Bookable Product that a barcode is to be captured for.

d) With the Bookable Product form open, select the small arrow in the navigation bar next to the name of the Bookable product and from the drop down, scroll across before choosing **Product Variants.**

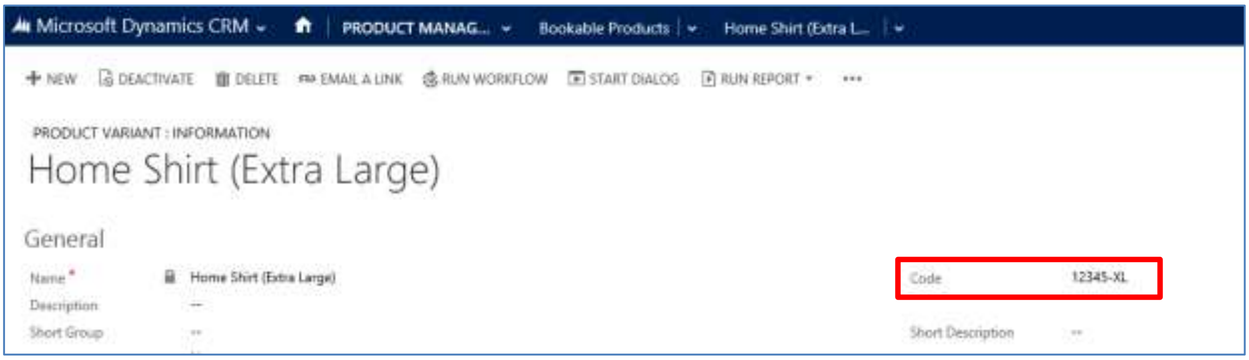


e) The Product Variant Associated View will be displayed showing all the different Variants associated to the selected Bookable Product.



f) Select each Product Variant that a barcode is to be captured for.

g) Within the Product Variant form use a scanner to scan the barcode of the relevant product. The Code field will populate with the barcode number.



h) Select the Save icon in the bottom right hand corner of the form. From the POS home page, if this item is scanned the product will be automatically added to the shopping cart.

Note: A barcode will need to be captured for each variant of a product

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7. STOCK HANDLING

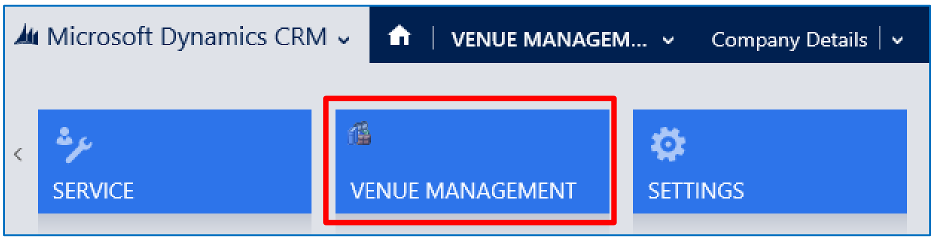
Any [Bookable Product of type Stock] requires a stock level and therefore this includes retail products. The Stock level is decreased or increased through normal POS/WEB booking operations, by the use of [Stock Transaction] records which are created whenever a Stock type Bookable Product is sold or credited. An entity called [Product Variant Location Stock Level] is used to record these stock levels. The stock level is updated every time a stock transaction record is created.

7.1. ENABLING STOCK HANDLING - CHANNEL SETTINGS

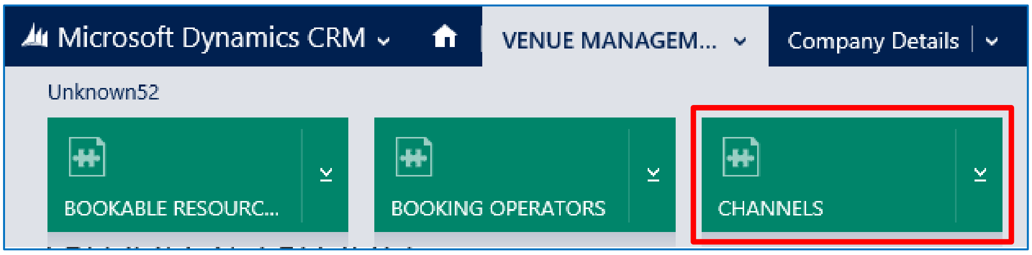
If stock levels are to be tracked and displayed for each product on the relevant Sales Channels a number of flags must be completed within the Channel form.

To enable the handling of Stock, complete the following:

a) Within CRM, select the **Microsoft Dynamics CRM** tab in the navigation bar before scrolling across and choosing **Venue Management** from the drop down.



b) Next select the **Venue Management** tab in the navigation bar and from the drop down choose **Channels.**



c) A list of any Active Channels will be displayed. Select and open the relevant Channel where stock handling is to be enabled.

d) Within the Channel form, ensure the following flags have been set.

- **Do not create Stock Transactions**. Set to **No**, this will allow [Stock Transactions] to be created.
- **Return Stock Levels**. Set to **Yes**, this will allow Stock Levels to be returned.

e) Select the Save icon in the bottom right hand corner of the screen.

7.2. CREATING A STOCK MOVEMENT

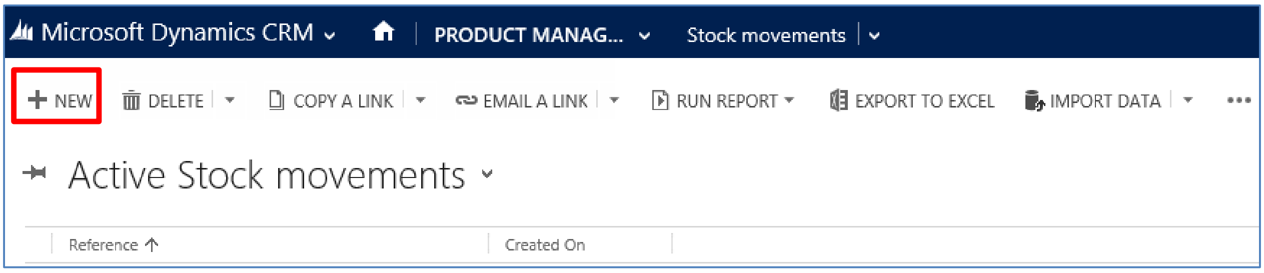
A Stock movement is the starting point for managing the stock in your system. Within CRM there is a facility to increase (or decrease), the available stock figure by the means of a Stock movement. Stock Movements consist of 1 or many movement lines. These movement lines are recorded as Stock Transaction records within the system. The stock movement is the header record which acts as a grouping for the transaction records.

To create a Stock Movement, complete the following:

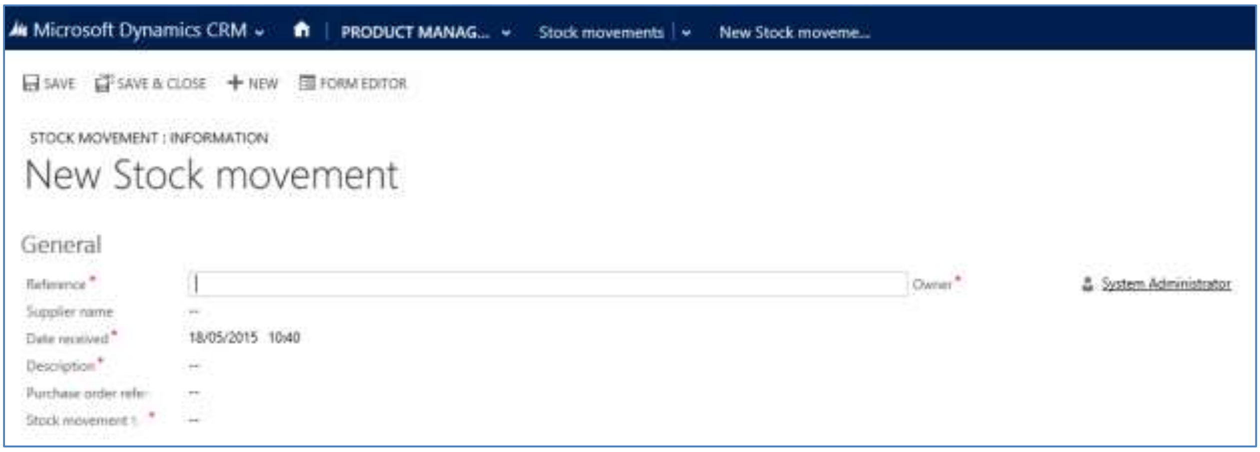
a) Select or hover over the **Microsoft Dynamics CRM** tab before scrolling across the drop down list of the navigation bar and selecting **Product Management**.

b) Next, in the Product Management area of CRM, select the **Product Management** tab before choosing **Stock Movements**.

c) The Active Stock movements view will be displayed. Select **New** on the ribbon.



d) A new Stock Movement form will be displayed, complete the following:



- **Reference:** Text field which can contain a reference to a physical entity such as delivery note paper work etc.
- **Supplier name**: If applicable enter the Name of the third party supplier of goods.
- **Date received:** This field will default to the date/time when the stock movement record has been created, (can be changed to indicate the actual date/time that the physical stock was received/adjusted/transferred).

- **Description.** Enter any text to indicate any other relevant details about the Stock movement.
- **Purchase order reference**: If applicable this field can be used to indicate a link back to an 'external' purchase order.
- **Stock movement type**: From the drop down choose the applicable Stock movement type:
  - **Adjustment:** A manual adjustment of stock to initially set stock figures for product variants, or used to set the correct figures after a stock-tacking process has completed.
  - **Goods received note:** Used to indicate that stock has been purchased and delivered into the organisation at the till-group level.
  - **Stock transfer:** Used to indicate that stock has been moved from one till-group to another till-group. Typically this stock movement will have two transaction lines – one being negative, (from the sending till group) and a positive transaction for the same amount at the receiving till-group.

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

EXAMPLE OF STOCK MOVEMENT RECORD CREATED

The example in the table below shows the mandatory fields which have been completed for a Stock Movement record that has been created for demonstration purposes of this document.

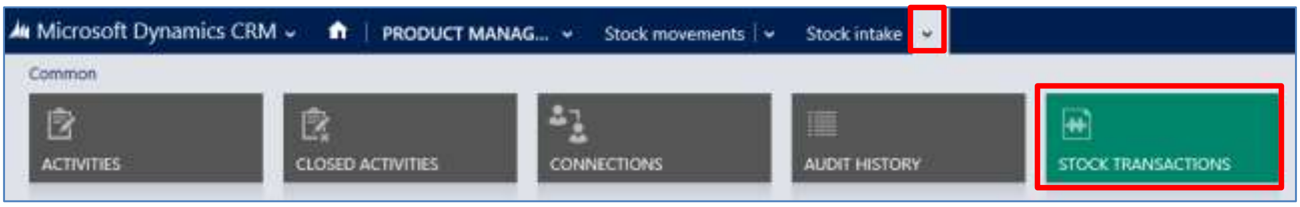
Record Type	Reference	Supplier Name	Date Received	Description	Stock Movement Type
Stock Movement	Ref: 29848	G4 Suppliers	17/02/93 10:56	New intake of Shirts	Goods Received Note (GRN)

7.3. CREATING STOCK TRANSACTIONS

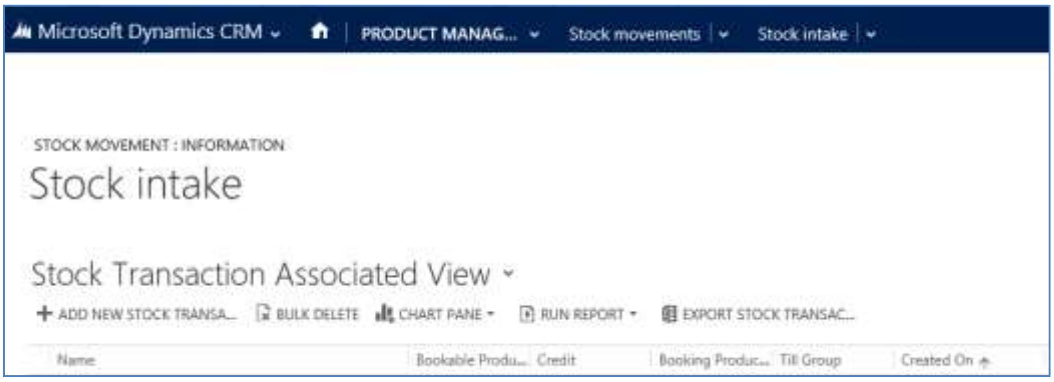
Once a Stock movement has been created it is possible to enter as many movement lines (Stock Transactions), which are applicable to the movement. Stock Transactions are used to increase or decrease the stock levels.

To link a Stock Transaction to a Stock Movement, complete the following:

a) With the Stock Movement form open, select the small arrow next to the name of the Stock Movement.



b) The Stock Transaction Associated View will be displayed, select **Add New Stock Transaction** on the ribbon.



c) A new Stock Transaction form will be displayed, complete the following:

- **Name**. Enter a name for the Stock Transaction, for example Delivery Received 19th September 2014.
- **Till Group.** Use the magnifying glass to look up and select the location at which the transaction is recorded (mandatory).
- **Product variant.** Use the magnifying glass to look up and select the Product Variant which the Stock Transaction is referring to e.g. chocolate bar (Each). If there are multiple Product Variants for the same product, for example Large, Medium and Small, then create a new Stock Transaction for each Product Variant.
- **Credit**. Enter a whole number, (positive or negative) which will influence the stock-level figure for the Product Variant at the location. For example if the stock of the selected Product Variant is 100, enter 100.
- **Booking product**. Not applicable when creating a stock transaction for a Stock movement.
- **Created On.** This field will default to the date/time when the Stock Transaction is created within CRM. These two values cannot be altered after the transaction record has been created.

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

EXAMPLE OF STOCK TRANSACTION RECORD CREATED

The example in the table below shows the mandatory fields that have been completed for a Stock Transaction record, created for demonstration purposes for this document.

Record Type	Name	Till Group	Product Variant	Credit
Stock Transaction	Delivery received 18th May 2015	F&B Tills	Large Shirts (Each)	100

7.4. PRODUCT VARIANT LOCATION STOCK LEVELS

Upon creation of a Stock Movement and Stock Transaction, the level of stock available for each Product Variant can be viewed in the Product Variant Location Stock Levels entity within CRM.

To view the stock levels of a particular product, complete the following within CRM:

a) Select or hover over the **Microsoft Dynamics CRM** tab before scrolling across the drop down list of the navigation bar and selecting **Product Management**.

b) Next, in the Product Management area of CRM, select the **Product Management** tab before selecting **Product Variant Location Stock Levels**.

c) The Active Product variant location stock levels view will be displayed, this will list all Till Groups, associated Product Variants and their Stock Levels. These will update every time the applicable Product Variant is sold.

8. PICKING AND DISPATCHING

The picking and dispatching process within CRM is designed to assist organisations that have taken orders on the Web sales channel. The functionality is centred on the after sales process of picking the goods sold (as per the system booking) and dispatching the goods to the customer. An overview of the process is shown below

1. Booking Created	2. Dispatch Batch Created	3. Picking	4. Goods Dispatched
Payment taken	All Active bookings	Picking Note Report is run	Delivery status set to Dispatched
Booking status Active	Delivery status Received	Physical picking	Goods sent
Delivery status Received	Not in another dispatch batch	Goods packed	

1. **Booking Created** - full payment has been taken via the WEB or POS channel and a full delivery address has also been submitted with the booking. The booking status is Active and the Delivery Fulfilment Status will be Received.

2. **Dispatch Batch Created** – This is created within CRM. This batch will be associated with all Active bookings that have a delivery fulfilment status of Received AND are not associated with any other Dispatch Batch. When a Dispatch Batch has been created the Delivery Fulfilment Status of all Bookings associated to it will change to In Progress.

3. **Picking** – Picking Note Report is run for the Dispatch Batch. Physical picking of the goods is undertaken and the goods are packed ready for dispatch.

4. **Goods Dispatched** - All bookings fully picked have their delivery fulfilment status manually set to Dispatched and the goods are sent.

Note: To make the most of the picking and dispatching functionality, the Stock Handling and VAT procedures need to be in place. The **Select Delivery Address** option must be set to **Yes** in the Channel which is creating the bookings.

8.1. BOOKING CREATED

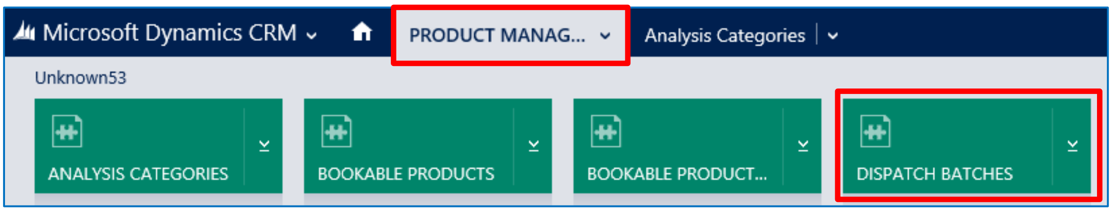
When the Select Delivery Address flag is set to **Yes** within the **Channel** form, and when a booking is created and payment has been taken, its **Delivery Fulfilment Status** will be set to **Received.** This can be viewed by navigating to the **Bookings** menu option and opening the appropriate booking.

8.2. DISPATCH BATCH CREATED

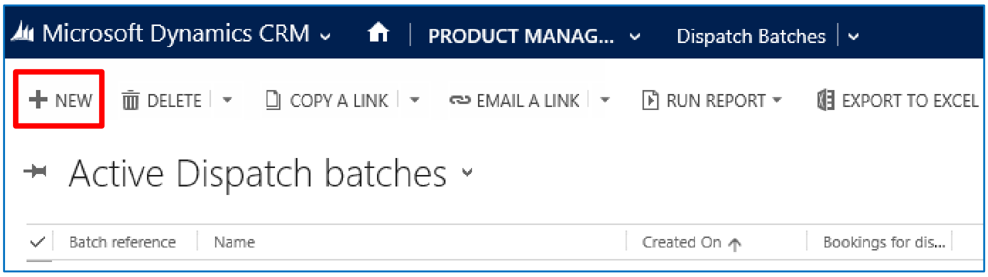
To create a new Dispatch Batch, complete the following instructions:

a) Select or hover over the **Microsoft Dynamics CRM** tab before scrolling across the drop down list of the navigation bar and selecting **Product Management**.

b) Next, in the Product Management area of CRM, select the **Product Management** tab and from the drop down choose **Dispatch Batches.**



c) The Active Dispatch Batches view will be displayed, select **New** on the ribbon.



d) A New Dispatch Batch form will be displayed

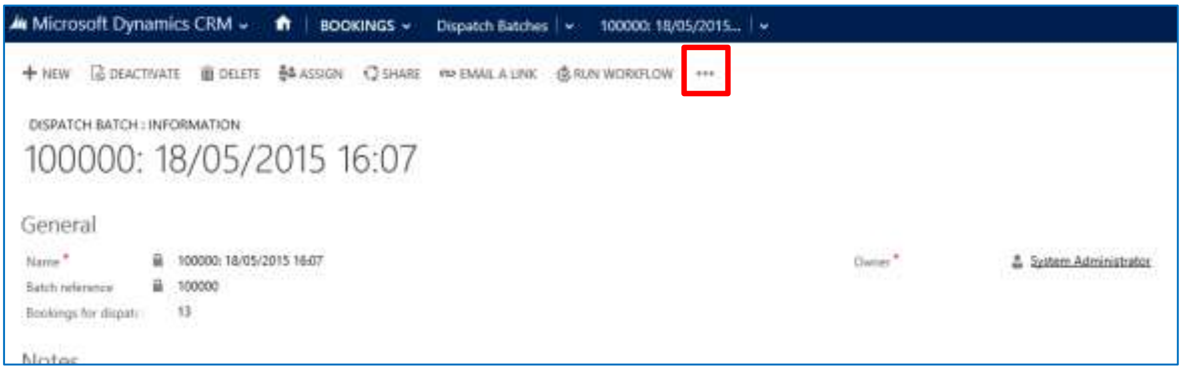
e) The process of creating and **saving** a new **Dispatch Batch** will associate the new Dispatch Batch with all Bookings on the system which are at **Delivery Fulfilment Status – Received**, BUT are not associated with any other Dispatch Batch records. When the Dispatch Batch has been created, all Bookings associated to it will have their Delivery Fulfilment Status changed to In Progress.

8.3. PICKING

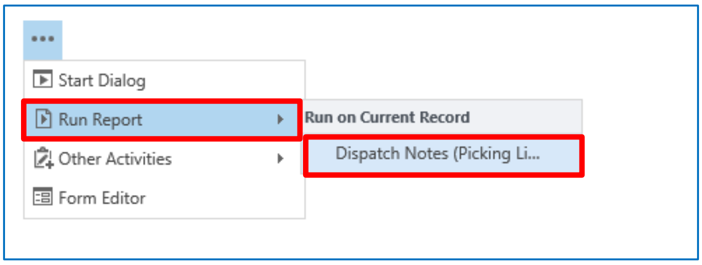
Once the Dispatch Batch has been created it is possible to run a report so that the Dispatch Notes (Picking List) can be viewed. If required this list can be printed.

To do this complete the following:

a) With the relevant Dispatch Batch form open, select the icon of three dots.



b) From the drop down menu select **Run Report** before choosing **Dispatch Notes (Picking List)**



c) A report Viewer window will appear and the Dispatch Notes (Picking List) will be generated.

Picking List

Customer details:

Peter Harris

74 Ainsdale Road

Date: 09/05/2014

Booking reference: 1031089, order 09/05/2014 10:54:02

Dispatch reference: 100004

Booking total: £28.50

Code	Product	Qty.	Location
HOME-3455-555	Mens Shirts (Each) Badge: Yes	1	111111
HOME-3455-555	Mens Shirts (Each) Shirt name: Jenny Murphy, Shirt number: 10	1	111111

Notes:

The **Code** is the SKU (stock keeping unit) code which was entered against the **Product Variant** and the location is the **Till Group** where the stock can be found, to pick and fulfil this booking.

8.4. GOODS DISPATCHED

Once the picking has been completed and the goods made ready for posting or delivery, a Delivery Note report can be run to include in the deliveries. The **Delivery Fulfilment Status** in the booking record can be set to **Dispatched**. The Dispatch Batch field will be auto populated when the Dispatch Batch is created.

Delivery Address

Label	Tom Green	City	Leicester
Line 1	19 Hardwicke Road	County	--
Line 2	Narborough	Postcode	LW1
Line 3	--	Country	New Zealand
Delivery Fulfilment S	Dispatched		
Dispatch batch	100000: 18/05/2015 16:07		

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