



CRM 2015

BOOKING  
MANAGEMENT  
USER GUIDE

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## ABOUT THIS DOCUMENT

This document has been prepared as a User Guide for the Booking Management of CRM 2015.

## NON-DISCLOSURE

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## DOCUMENT CONTROL

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## BOOKING MANAGEMENT INTRODUCTION

Every Booking made using the Go software system is retained within CRM. As these are therefore centrally located it makes it easy for bookings to be found and analysed. The bookings in CRM provide full detailed information relating to customers' bookings, which allow for easy access and monitoring of every single piece of detail.

This document will introduce ways a Booking can be found, whilst also covering the different details which can be found within a Booking form. It will also highlight the Related Items that are connected to a booking and also reached from the Booking form.

### BOOKING MANAGEMENT



# BOOKING MANAGEMENT

## 1. FINDING A BOOKING

Bookings can be found quickly and easily within CRM as it has a dedicated Booking section. All bookings made will be displayed in this section and can be searched for using the booking reference number. Additionally, bookings can be found by navigating to the Contact who has made the bookings, making it possible to view all bookings that are related to an individual Contact.

## 2. BOOKING FORM

Booking Forms offer detailed information regarding the booking that has been made. These can be used to review the details of the booking such as the price, the purchaser and channel that the booking has been made. It also collects any information regarding discounts that may have been applied to the booking.

## 3. RELATED ITEMS

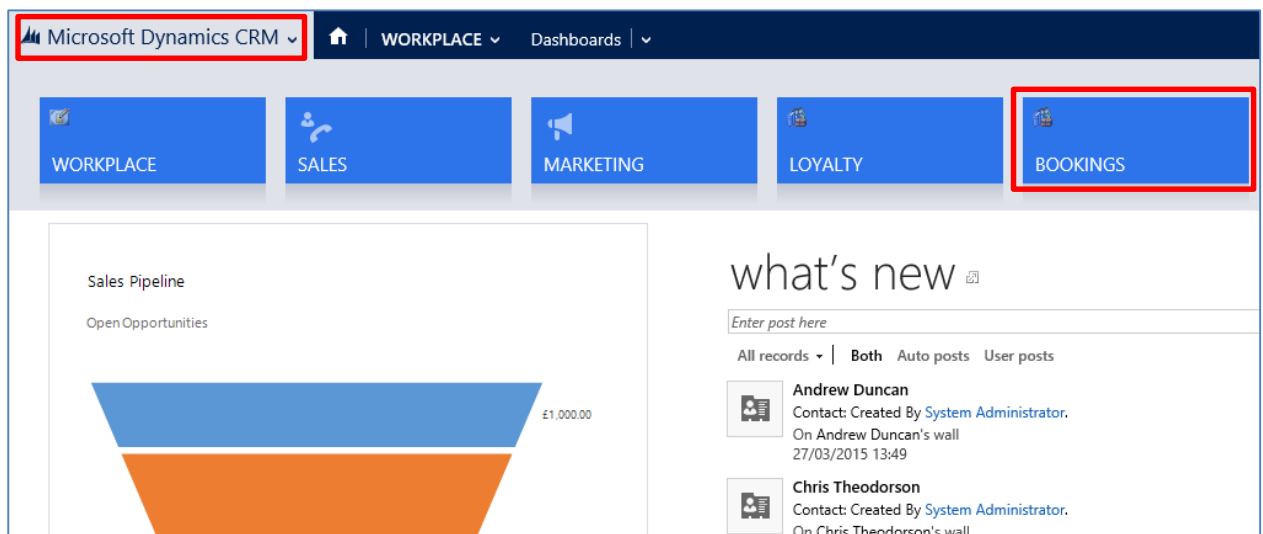
Connected to the Bookings are a range of Related Items. These Related Items offer an additional insight into the bookings that have been made. For example they enable the exact payment method used, the products that have been purchased with the booking and any tickets or seat allocations that are linked to the booking to be found.

## 1. FINDING A BOOKING

When a product is sold or a booking is made via the booking website or POS, a new booking record is created within CRM. This allows any bookings that have been made to be found quickly and easily. Bookings can be found in a number of ways such as viewing them using the booking reference or via those that are linked to a Contact.

To view a list of bookings within CRM you should do the following:

- From the CRM home page select the **Microsoft Dynamics CRM** tab in the navigation area before choosing **Bookings** from the drop down.



- A list of Active Bookings will be displayed, starting with the most recent.

Microsoft Dynamics CRM | BOOKINGS | Bookings | Create | System Administrator

NEW | DELETE | COPY A LINK | EMAIL A LINK | RUN REPORT | EXPORT TO EXCEL | IMPORT DATA

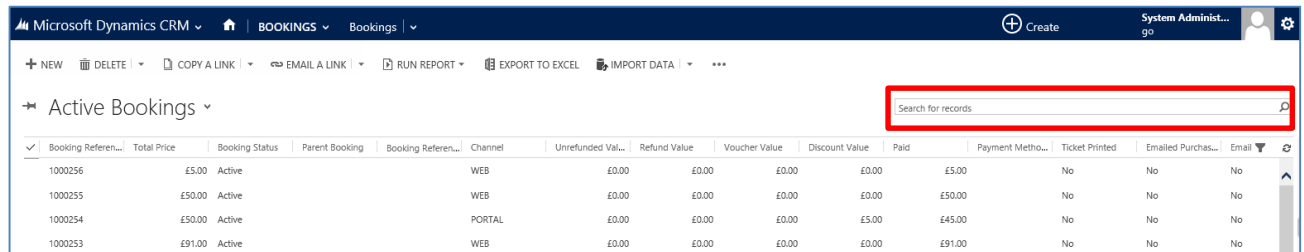
Active Bookings | Search for records

Booking Referen...	Total Price	Booking Status	Parent Booking	Booking Referen...	Channel	Unrefunded Val...	Refund Value	Voucher Value	Discount Value	Paid	Payment Metho...	Ticket Printed	Emailled Purchas...	Email
1000256	£5.00	Active			WEB	£0.00	£0.00	£0.00	£0.00	£5.00	No	No	No	
1000255	£50.00	Active			WEB	£0.00	£0.00	£0.00	£0.00	£50.00	No	No	No	
1000254	£50.00	Active			PORTAL	£0.00	£0.00	£0.00	£5.00	£45.00	No	No	No	
1000253	£91.00	Active			WEB	£0.00	£0.00	£0.00	£0.00	£91.00	No	No	No	
1000252	£20.00	Active			POS	£0.00	£0.00	£0.00	£0.00	£20.00	No	No	No	
1000251	£20.00	Active			WEB	£0.00	£0.00	£0.00	£0.00	£20.00	No	No	No	
1000250	£10.00	Active			F&B	£0.00	£0.00	£0.00	£0.00	£10.00	No	No	No	
1000249	£10.00	Active			F&B	£0.00	£0.00	£0.00	£0.00	£10.00	No	No	No	
1000248	£25.00	Active			POS Stadium	£0.00	£0.00	£0.00	£0.00	£25.00	No	No	No	
1000247	£32.00	Active			F&B	£0.00	£0.00	£0.00	£0.00	£32.00	No	No	No	
1000246	£32.00	Active			F&B	£0.00	£0.00	£0.00	£0.00	£32.00	No	No	No	
1000245	£51.00	Active			WEB	£0.00	£0.00	£0.00	£0.00	£51.00	No	No	No	
1000244	£50.50	Active			WEB	£0.00	£0.00	£0.00	£0.00	£50.50	No	No	No	
1000243	£50.00	Active			WEB	£0.00	£0.00	£0.00	£0.00	£50.00	No	No	No	
1000242	£30.00	Active			POS Stadium	£0.00	£0.00	£0.00	£0.00	£30.00	No	No	No	
1000241	£31.50	Active			F&B	£0.00	£0.00	£0.00	£0.00	£31.50	No	No	No	
1000240	£31.50	Active			F&B	£0.00	£0.00	£0.00	£0.00	£31.50	No	No	No	
1000238	£50.00	Active			PORTAL	£0.00	£0.00	£0.00	£5.00	£45.00	No	No	No	
1000237	£51.00	Active			WEB	£0.00	£0.00	£0.00	£0.00	£51.00	No	No	No	

## SEARCHING FOR A BOOKING USING THE BOOKING REFERENCE

All products which are sold are given a Booking Reference, making it easy for them to be found. To find a booking using the Booking Reference complete the following:

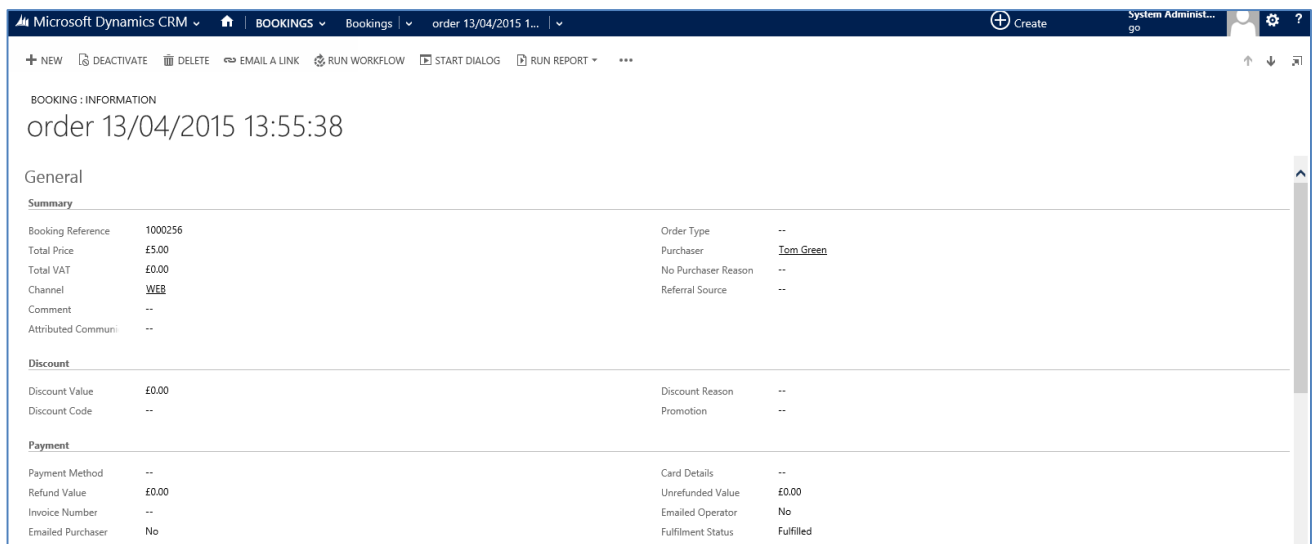
- To search for a particular booking, with the list of Active Bookings open, enter the booking reference in the search box at the top right of the view and click the search icon:



The screenshot shows the 'Active Bookings' view in Microsoft Dynamics CRM. A red box highlights the search bar at the top right, which contains the text 'Search for records'. Below the search bar is a table of active bookings.

Booking Reference	Total Price	Booking Status	Parent Booking	Booking Reference	Channel	Unrefunded Value	Refund Value	Voucher Value	Discount Value	Paid	Payment Method	Ticket Printed	Emailed Purchaser	Email
1000256	£5.00	Active			WEB	£0.00	£0.00	£0.00	£0.00	£5.00	No	No	No	
1000255	£50.00	Active			WEB	£0.00	£0.00	£0.00	£0.00	£50.00	No	No	No	
1000254	£50.00	Active			PORTAL	£0.00	£0.00	£0.00	£5.00	£45.00	No	No	No	
1000253	£91.00	Active			WEB	£0.00	£0.00	£0.00	£0.00	£91.00	No	No	No	

- The list of bookings will be revised to show bookings that match only the booking reference.
- To open a booking, double click the booking reference.
- The booking form will be displayed in the form view. For more information on what can be found within the Booking form see section [2, Booking Form](#)



The screenshot shows the 'BOOKING : INFORMATION' form view for the booking 'order 13/04/2015 13:55:38'. The form is divided into several sections: General, Summary, Discount, and Payment.

**General**

BOOKING : INFORMATION  
order 13/04/2015 13:55:38

**Summary**

Booking Reference	1000256	Order Type	--
Total Price	£5.00	Purchaser	Tom Green
Total VAT	£0.00	No Purchaser Reason	--
Channel	WEB	Referral Source	--
Comment	--		
Attributed Community	--		

**Discount**

Discount Value	£0.00	Discount Reason	--
Discount Code	--	Promotion	--

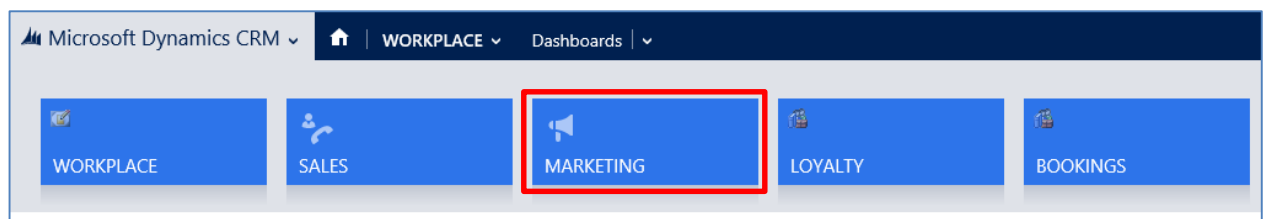
**Payment**

Payment Method	--	Card Details	--
Refund Value	£0.00	Unrefunded Value	£0.00
Invoice Number	--	Emailed Operator	No
Emailed Purchaser	No	Fulfillment Status	Fulfilled

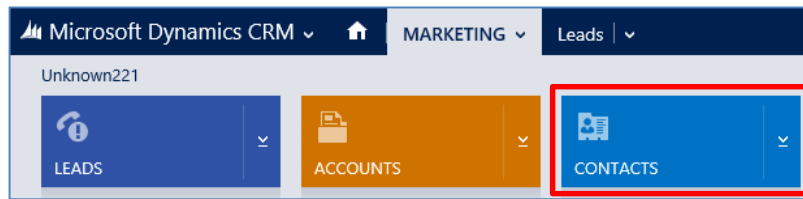
## SEARCHING FOR A BOOKING THAT IS LINKED TO A CONTACT

To view bookings linked to a contact:

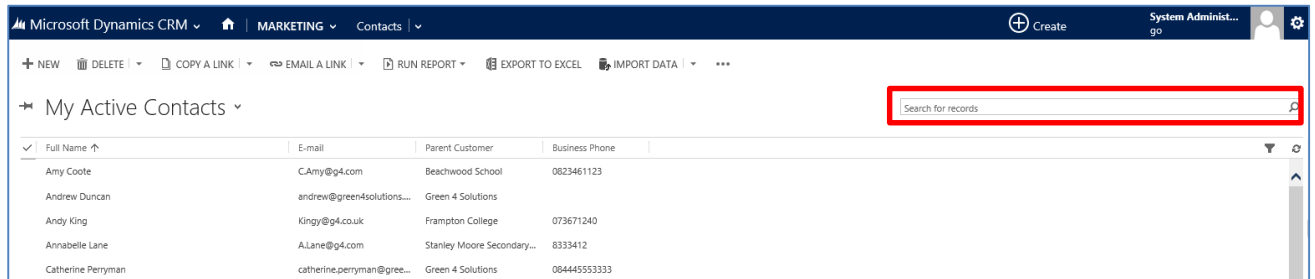
- From the CRM home page select the **Microsoft Dynamics CRM** tab in the navigation area before choosing **Marketing** from the drop down.



- b) Next, in the Marketing area of CRM, select the **Marketing** tab before choosing **Contacts** from the drop down list of the navigation bar.



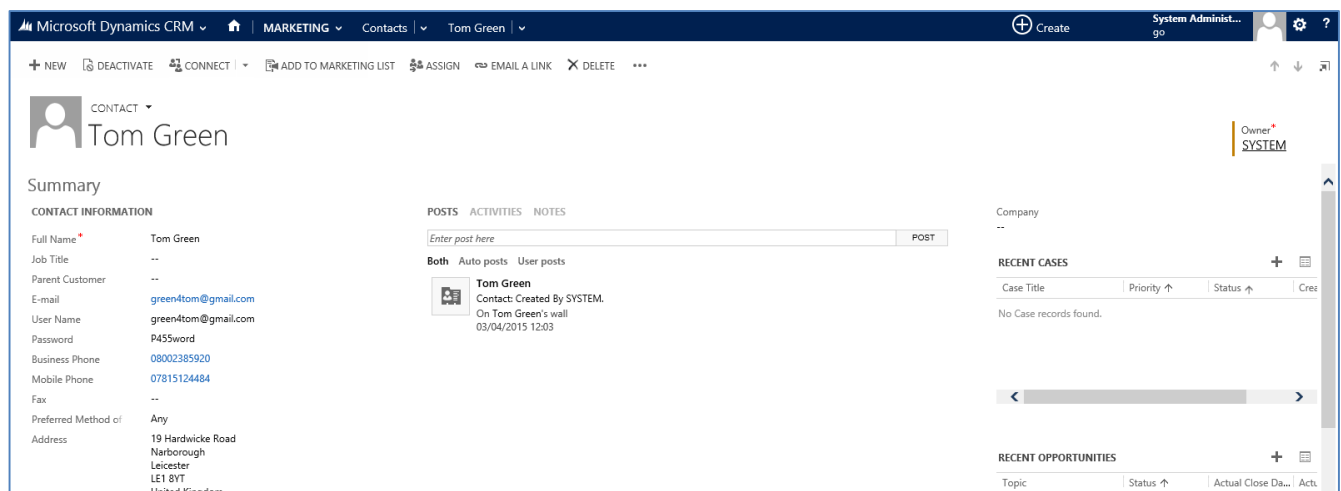
- c) A list of Active Contacts will be displayed, use the search bar at the top right of the view to search for a Contact that has made a booking.



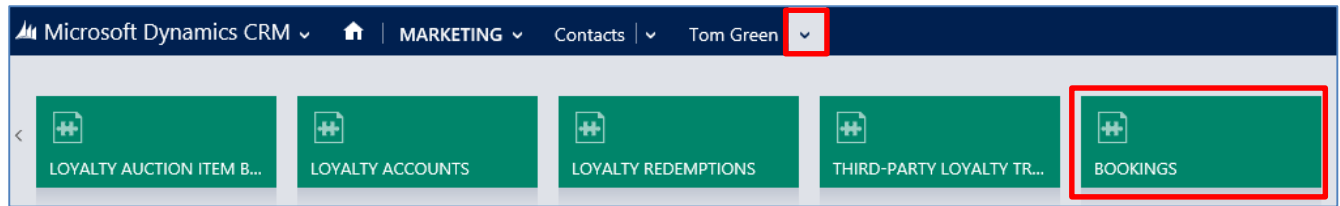
**Note.** For a wildcard search, the Asterix '\*' character can be used to search on partial text. For example if you need to search for the surname 'Ryan' but do not know the first name of the contact, by entering a '\*Ryan' will list all contacts with the surname Ryan.

Fields that can be searched in this view include: Email, First Name, Full Name, Last Name, Middle Name and Parent Customer.

- d) The list of contacts will be revised to display those that match the details entered in the search area.
- e) To open the contact record, click over the individual's name.
- f) The contact record will be opened in the form view.



- g) To view the bookings linked to the contact's record, select the small arrow in the navigation bar next to the Contacts name. From the drop down, scroll across and choose **Bookings**.



h) A list of all the Bookings associated to the selected Contact will be displayed as is shown below.

Booking Reference	Total Price	Delivery Fulfillment	Voucher Value	Discount Value	Booking Status
1000070-R	-£6.50				Inactive
1000232-R	-£1.00				Inactive
1000085-R	-£6.50				Inactive
1000216-R	-£28.00				Inactive
1000142-R	-£928.80				Inactive
1000187-R	-£1,032.00				Inactive
1000187-1-R	-£1,032.00				Inactive
1000132-R	-£928.80				Inactive
1000229-R	-£9.00				Inactive
1000176-R	-£1,032.00				Inactive
1000218-R	-£3.00				Inactive
1000137-R	-£34.00				Inactive
1000082-R	-£2.00				Inactive

- i) To view the details of a booking, click over the booking reference number.
- j) The booking form will be displayed in the form view. For more information on what can be found within the Booking form see section [2, Booking Form](#)



## 2. BOOKING FORM

The Booking Form gives the details of the Bookings made using the Go booking system. As discussed in Section 1, Booking Forms can be found by [Searching for a Booking using a Booking Reference](#) as well as the [Contact](#) who has made the booking. The Booking Form is split into a number of sections and each of these sections is listed below with a description of what is shown in each.

Below is an example of what a Booking Form looks like in CRM 2015:

Microsoft Dynamics CRM | BOOKINGS | Bookings | order 13/04/2015 10:53:33

BOOKING : INFORMATION  
order 13/04/2015 10:53:33

General

Summary

Booking Reference	1000254	Order Type	--
Total Price	£50.00	Purchaser	<a href="#">Tom Green</a>
Total VAT	£0.00	No Purchaser Reason	--
Channel	<a href="#">PORTAL</a>	Referral Source	--
Comment	--		
Attributed Communi	--		

Discount

Discount Value	£5.00	Discount Reason	Promotions:Localtourism
Discount Code	Localtourism	Promotion	<a href="#">Local Tourism Portal Discount</a>

Payment

Payment Method	--	Card Details	--
Refund Value	£0.00	Unrefunded Value	£0.00
Invoice Number	--	Emailed Operator	No
Emailed Purchaser	No	Fulfilment Status	Fulfilled

Delivery Address

Label	--	City	--
Status	Active		

## SUMMARY

The Summary area displays basic information relating to the booking. For example the Booking Reference number, the Total Price of the Booking, the Purchaser and the Channel where the booking has been made. Additionally, if no Purchaser has been added when the booking was made, the reason for this will be shown and any comments that have been added to the booking will be shown here.

Summary

Booking Reference	1000233	Order Type	--
Total Price	£51.00	Purchaser	<a href="#">Tom Green</a>
Total VAT	£0.00	No Purchaser Reason	--
Channel	<a href="#">WEB</a>	Referral Source	--
Comment	--		
Attributed Communi	--		

## DISCOUNT

The Discount area will display the details of any promotions which have been applied to the booking. The value of the discount, the discount code that has been applied to the booking, the Discount Reason and Promotion will all be displayed in this section of the form. If no discount has been applied, the Discount area will remain clear.

The example below illustrates the information that may be displayed.

Discount			
Discount Value	£103.20	Discount Reason	Promotion:LOCALTOURISM
Discount Code	LOCALTOURISM	Promotion	<a href="#">Local Tourism Portal Discount</a>

## PAYMENT

The Payment area will display a summary of the payments taken. Note, because multiple payment methods can be used against a booking, the Payment Method, Card Details or Invoice Number fields will not be filled in.

Payment			
Payment Method	--	Card Details	--
Refund Value	£125.00	Unrefunded Value	£0.00
Invoice Number	--	Emailed Operator	No
Emailed Purchaser	No	Fulfilment Status	Fulfilled

## DELIVERY ADDRESS

If the customer has selected a delivery address for the order, this will be shown in the delivery address area.

Delivery Address			
Label	--	City	--
Line 1	--	County	--
Line 2	--	Postcode	--
Line 3	--	Country	--
Delivery Fulfilment S	Delivered		
Dispatch batch	--		



## TICKET COLLECTION

The ticket collection method field can be used to record the details of how the tickets are to be collected if this functionality has been set up. For example is the ticket to be Collected at the Venue or Printed at Home.

Ticket Collection	
Ticket Collection Method	--

## OPERATION

The Operation section is used to record details of the operator who made the booking. The information collected will include the name of the booking operator and the till used.




Operation	
Booking Operator	<u>Steve Worthing</u>
Till	web
Media Code	--
Booking Number	 137
Vouchers Collected	No
Ticket Printed	No
Booking Terminal	<u>web</u>
Transaction Code	--
Loyalty Processed	 No

## LINKED BOOKINGS

The Linked Bookings area is used to record details of the booking thread.

Linked Bookings	
Next Booking	--
Renewed Booking	--
Previous Booking	--

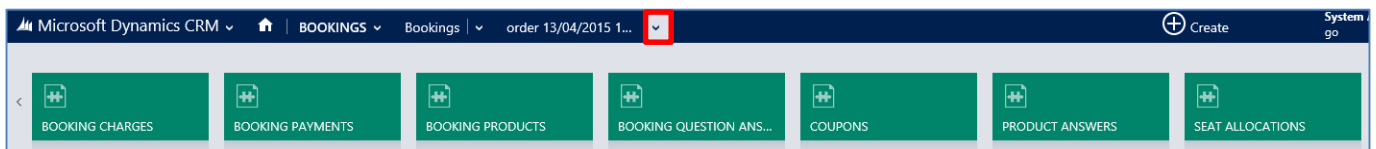
Within the Go system, when a booking is edited a booking thread is created to handle the transfer of payment and products from the original booking to the revised booking. For example in the screenshot below, the initial booking 1000534 has been revised. The new booking has the reference 1000534-1. The booking with the reference 1000534-R is the reversal of the original booking.

<input type="checkbox"/>	Booking Refere...	Booking Status	Total Price
<input type="checkbox"/>	 1000534	Inactive	£47.00
<input type="checkbox"/>	 1000534-1	Active	£47.00
<input type="checkbox"/>	 1000534-R	Inactive	-£47.00

### 3. RELATED ITEMS

Related to the booking are a number of relevant additional entities which will give you additional information relating to the booking made.

Each one of the entities below can be found by selecting the small arrow that is situated next to the Order name of the booking in the navigation bar as shown below.



### BOOKING PAYMENTS

The Booking Payments area will list individual Payment Methods used to complete the selected booking.

Microsoft Dynamics CRM

BOOKINGS

Bookings

order 15/04/2015 1...

Create

BOOKING : INFORMATION

order 15/04/2015 14:47:07

Booking Payment Associated View

ADD NEW BOOKING PAY...

ADD EXISTING BOOKING...

BULK DELETE

CHART PANE

RUN REPORT

EXPORT BOOKING PAYME...

Name	Payment Metho...	Payment Amou...	Booking Operat...	Payment Status...	Card Authorisati...	Terminal	Card Number	Discount Code	Voucher No.	Payment Date	Payment Mand...
Card Payment	Card	\$40.00		Approved	BYPASSCOM...	web	****			16/04/2015 1...	

To view the details of the payment, click on the payment Name.

Microsoft Dynamics CRM	BOOKINGS	Bookings	Card Payment
<a href="#">+ NEW</a> <a href="#">DEACTIVATE</a> <a href="#">DELETE</a> <a href="#">EMAIL A LINK</a> <a href="#">RUN WORKFLOW</a> <a href="#">START DIALOG</a> <a href="#">RUN REPORT</a>			
BOOKING PAYMENT : INFORMATION			
Card Payment			
General			
Payment Method	Card	Payment Amount	\$40.00
Booking	order 15/04/2015 14:47:07	Payment Date	16/04/2015 14:48
Name*	Card Payment	Payment Status	Approved
Booking Operator	--	Terminal	web
Loyalty Redemption	--	Charge Amount (Bas	--
Provider Reference	--		
Card Type	--	Card Authorisation C	BYPASSCOMMIDEA
Card Number	****	Card Start	/
Card Holder Name	Lara	Card Expiry	12/15
		Card Issue No.	--
Payment Service	CommIdeA	Service Reference	75798AE7
Payment Reference	1000143		

## BOOKING PRODUCTS

The Booking Products area will display details of the products bought.

Microsoft Dynamics CRM | BOOKINGS | Bookings | order 15/04/2015 1...

BOOKING : INFORMATION

order 15/04/2015 14:47:07

Booking Product Associated View

+ ADD NEW BOOKING PRO... + ADD EXISTING BOOKING... BULK DELETE CHART PANE RUN REPORT EXPORT BOOKING PRODU...

Quantity	Product Variant	Booking Price	End Datetime	Start Datetime
1	Five-a-side (Per Pitch)	£40.00	17/04/2015 1...	17/04/2015 1...
1	Collection (Each)	£0.00		

Via the booking product you will be able to navigate to the actual Bookable Product and Variant purchased. The booking product record will display the actual price paid for the product.

Microsoft Dynamics CRM | BOOKINGS | Booking Products | activity booking ite...

+ NEW DEACTIVATE DELETE EMAIL A LINK RUN WORKFLOW START DIALOG RUN REPORT ...

BOOKING PRODUCT : INFORMATION

activity booking item 15/04/2015 14:47:08

General

Name	activity booking item 15/04/2015 14:47:08		
Booking	order 15/04/2015 14:47:07	Booking Price	£40.00
Product Variant	Five-a-side (Per Pitch)	Booking price VAT	£0.00
Start Datetime	17/04/2015 13:00	Product Session	--
Parent Cross Sell Pro	--	End Datetime	17/04/2015 14:00

## BOOKING TICKETS

The Booking Tickets area will display details of the tickets that have been generated for the booking. The Booking Tickets area will record information such as whether the ticket has been printed, cancelled, whitelisted or blacklisted (for access control).

Microsoft Dynamics CRM | BOOKINGS | Bookings | order 10/04/2015 1...

BOOKING : INFORMATION

order 10/04/2015 16:37:41

Ticket Associated View

+ ADD NEW BOOKING TICKET + ADD EXISTING BOOKING... EDIT ACTIVATE DEACTIVATE DELETE BOOKING TICKET BULK DELETE ...

Name	Ticket Number	Barcode	Printed	Is Cancelled	Whitelisted	Blacklisted
TICKET			No	No		

## SEAT ALLOCATIONS

The Seat Allocations will list the seats allocated to the booking. The information will include the block, row and seat that has been allocated to the individual. This will reflect the seat selected during the sales process.

Microsoft Dynamics CRM | BOOKINGS | Bookings | order 10/04/2015 16:37:41

BOOKING : INFORMATION

### order 10/04/2015 16:37:41

Seat Allocation Associated View

+ ADD NEW SEAT ALLOCATI... BULK DELETE CHART PANE RUN REPORT EXPORT SEAT ALLOCATIO...

Booking	Booking Produc...	Fixture	Series ↑	Block	Row	Seat
order 10/04/2...	activity booki...		Sporting Gree...	North 2	I	12

By double clicking on the booking in the Seat Allocation Associated View, more information regarding the seat allocation will be shown.

Microsoft Dynamics CRM | BOOKINGS | Bookings | Allocation

+ NEW DEACTIVATE DELETE EMAIL A LINK RUN WORKFLOW START DIALOG RUN REPORT ...

SEAT ALLOCATION : INFORMATION

### Allocation

General

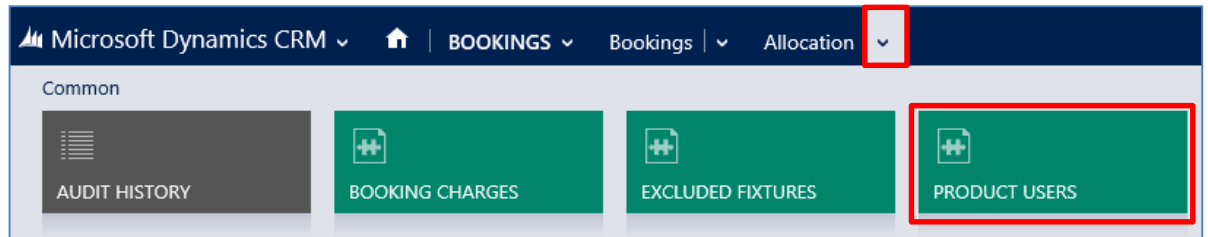
Name *	Allocation		
Booking *	order 10/04/2015 16:37:41	Booking Product	activity booking item 10/04/2015 16:37:41
Series	Sporting Green 4 Season Ticket 14/15	Fixture	--
Block *	North 2	Row *	I
Change Type	--	Seat *	12

Away Tickets

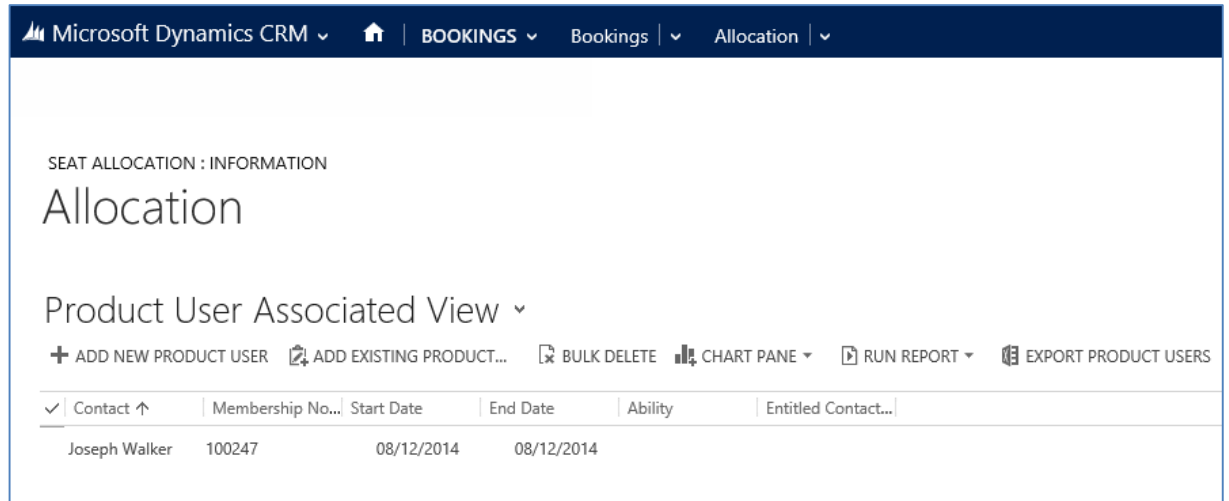
Away Block	--	Away Block Name	--
Seat Postfix	--	Ticket Reference Num	--

Furthermore, from here it is possible to display the Product User of the selected seat Allocation. To do this complete the following:

- With the Allocation open select the small arrow next to the allocation tab in the navigation area. From the drop down select **Product Users**.



- b) This will display the Product Users related to the booking. To open the Product Users details, tick the box next to the name of the user before double clicking on the name, a Product User form will then be displayed.



**\*End of Document\***