



CRM 2015

DELIVERY OPTIONS, CHARGES &
ADDITIONAL CHARGES SETUP

USER GUIDE V3.7

green4
SOLUTIONS



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ABOUT THIS DOCUMENT

This document has been prepared as a User Guide for the setup of Delivery Options, Charges and Additional Charges in CRM 2015.

NON-DISCLOSURE

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DOCUMENT CONTROL

Version	Date	Change	Initials
V1.0		This is a new document	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 solution provides the ability for a system administrator to configure different Delivery Options and Additional Charges for bookings made on the system.

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 of products or for making a booking, Delivery Option type Bookable Products also need to be set up. This document provides appropriate instruction to do this.

DELIVERY OPTIONS, CHARGES & ADDITIONAL CHARGES



DELIVERY OPTIONS, CHARGES & ADDITIONAL CHARGES

DELIVERY OPTIONS

Many different types of Delivery Options can be setup within CRM based on your organisations requirements. These are set up as Delivery Option type Bookable Products and instruction on creating these can be found below.

Examples of the type of Delivery Option that can be created include:

- Collection
- Postal Delivery
- Print @ Home

ADDITIONAL CHARGES

Additional Charges allow an extra cost to be automatically added to the standard price of a booking.

Additional Charges can be created in a number of ways and can be added when a specific Channel or Payment Method is used.

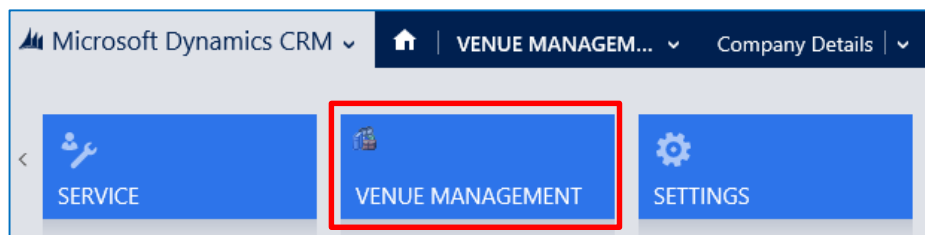
Alternatively an Additional Charge can be added for specific Events (Series or Fixtures), typically known as an Event Charge.

1. SETTING UP THE DELIVERY OPTIONS ON THE CHANNEL

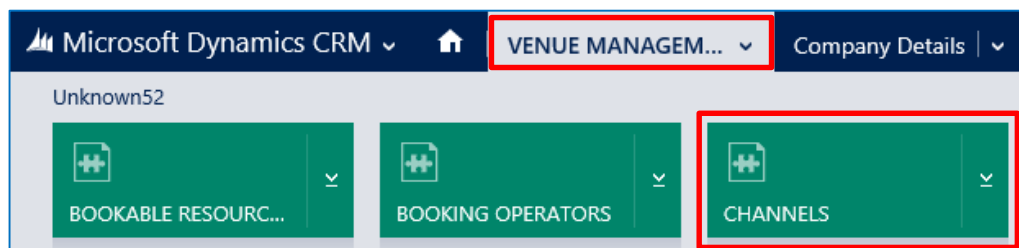
The Channels products are sold on must have the Delivery Option setting selected correctly if delivery is required. This will ensure that the end customer is prompted to select a Delivery Option in the POS or Web. This section assumes that the Channels have already been created on your system, for more information on Channels, see the Go CRM 2015 Infrastructure Setup User Guide.

To set the Channel, complete the following steps:

- 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**.

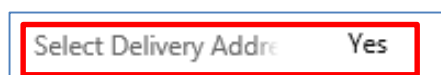


- c) A list of any Active Channels will be displayed, open the Channel where the delivery options are to be offered, for example the POS Channel.

The screenshot shows the 'Active Channels' list in Microsoft Dynamics CRM. The list contains the following data:

✓	Name ↑	Self Service	Cash Account	Select Seats	Anonymous boo...	Allow Tabs	Description	MinutesInThePa...	MonthsInTheFut...	Future Days	Call Centre
	F&B	No		No	Yes	Yes	F&B Channel	60	12	365	No
	PORTAL	No		Yes	No	Yes	PORTAL Channel	60	12	365	No
	POS	No		Yes	No	Yes	POS Channel	60	12	365	No
	POS Stadium	No		Yes	No	Yes	POS Stadium	60	12	365	No
	WEB	No		Yes	No	Yes	Web Channel	60	12	365	No
	Web Stadium	No		Yes	No	Yes	Web Stadium	60	12	365	No

- d) In the General section of the Channel form, set the **Select Delivery Address** option to **Yes**.



- e) Select the Save icon in the bottom right hand corner of the screen. The above process should be repeated for each Channel a Delivery Option is offered on.

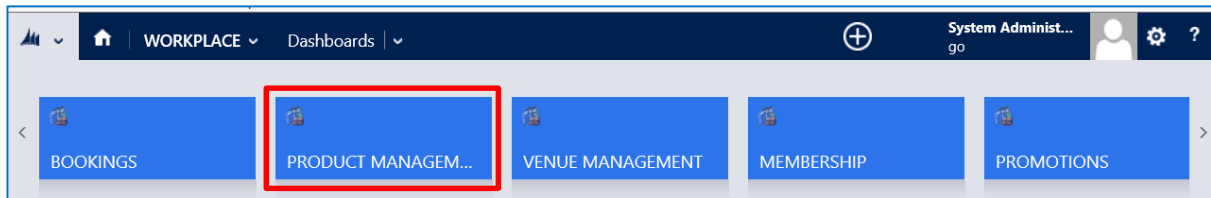
2. DELIVERY OPTION TYPE BOOKABLE PRODUCTS

Delivery Option type Bookable Products need to be set up for each type of delivery mechanism which will be offered for your products, even if there is no charge for the delivery. For example, a Collection Delivery Option type Bookable Product could be set up with a zero value as this is free of charge, whereas a Postage Delivery Option type Bookable Product could be set up with a charge.

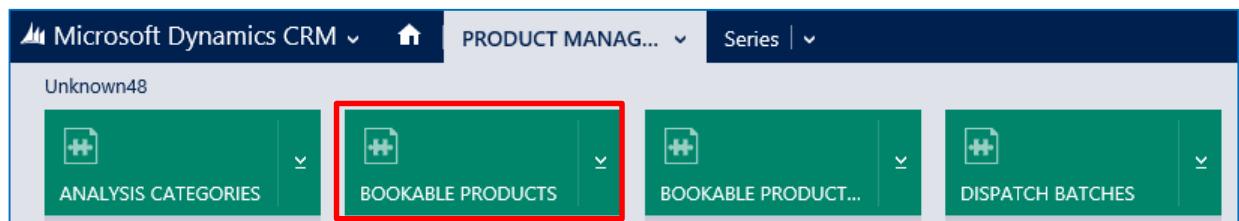
The section below assumes that a Sales Plan type of Other, Variants, a valid Variant Price List and Channel Price List have all been created. Information on these can be found in the Go CRM 2015 Product Management User Guide.

To set up a Delivery Option type Bookable Product, complete the following:

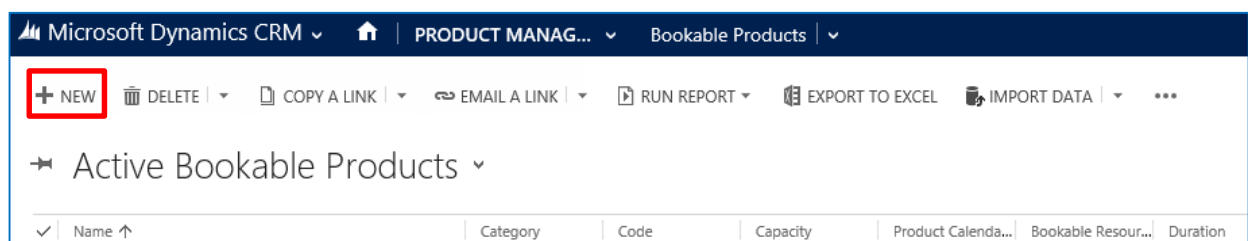
- a) Select or hover over the **Microsoft Dynamics CRM** tab before scrolling across the drop down list of the navigation bar and selecting **Product Management**.



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



- c) A list of the currently active Bookable Products will be displayed. Select **New** on the ribbon.



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



Note: All other fields in Bookable Product form that are not listed below do not need to be completed or changed when creating a Delivery Option.

- **Name.** Enter a name of the Delivery Option Bookable Product. For example Collection, Postage or Print at Home.
- **Description.** Enter a Description of the Delivery Option.
- **Type.** From the drop down, choose the type **DeliveryOption**.
- **Payable By.** If the Delivery Option can be paid for using Direct Debit select the Direct Debit payment method, from the Lookup.
- **VAT Code.** If applicable, select the VAT Code that applies to the Delivery Option.
- **Category.** Select a Category which the Delivery Option will be held under, or create a new one.
- **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.

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.
- **Print at Home.** If creating a Print at Home delivery option, select **Yes**. Select **No** for all other Delivery Option Bookable Products.

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

f) Next, it is necessary to indicate which **Channels** the Delivery Option will appear on. To set the Channels, do the following:

- Scroll down to the **Channels** section of the Bookable Product form

- ii. The Channels that have been set up during the configuration of your system will be listed. Select the checkbox alongside each Channel through which the Delivery Option will be available on.

Channels

☐ F&B
 ☐ PORTAL
 ☐ POS
 ☐ POS Stadium
 ☐ WEB
 ☐ Web Stadium

- iii. Select **Save** on the ribbon.

g) Next, it is necessary to identify the Delivery Options Variants and Prices:

- i. Scroll down to the **Variants & Pricing** section of the Bookable Product form.
- ii. 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.

The Variant of **Each** should be chosen for Delivery Options.

For more information on Variants see the Go CRM 2015 Product Management User Guide.

Variants & Pricing

Collection (Each)

▼

+

Code

Not for Sale

Mandatory Variant

...

- iii. Select the green cross alongside the Variant name to add a new Variant.
- iv. If you need to remove a variant, click the red minus sign alongside the variant.

Variants & Pricing

Collection (Each)

▼

+

Code

Not for Sale

Mandatory Variant

...



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.

h) Next, the price of the Delivery Option must be entered. To do this:

- i. Select the relevant **Variant Price List** from the drop down at the right hand side of the Variants & Pricing section (highlighted below). For more information on Variant Price Lists see the Go CRM 2015 Product Management User Guide.

Variants & Pricing

Collection (Each)

▼

+

Code

Not for Sale

Mandatory Variant

...

▼

- ii. Peak Price and Off Peak Price fields will appear when selecting the appropriate Variant Price List. In both the Peak Price and Off Peak Pricing fields the same price information should be entered for each of the variants that have been selected.

As Collection is usually free the price of 0.00 should be entered into the Peak and Off Peak price fields. In contrast, there is often a cost for Postage, so the cost of postage should be entered into these fields.

- iii. Repeat this process for each Variant Price List used to govern the pricing of the selected product.

When the pricing details are complete select **Save** in the bottom right hand corner of the Bookable Product form. The Bookable Product form is complete and the Delivery Option should appear when purchasing a product in the selected Channels.

EXAMPLE OF DELIVERY TYPE OPTION TYPE BOOKABLE PRODUCT

Two Delivery Option type Bookable Products have been created as examples for this document showing both Collection and Delivery. The table shows the mandatory fields that have been completed in each Bookable Product form.

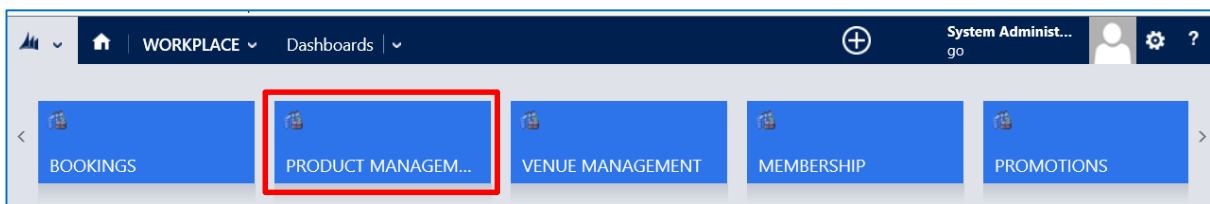
Record Type	Name	Type	Category	Requires Delivery	Print at Home	Channels	Variants	Variants Price List	Price
Bookable Product	Collection	DeliveryOption	Sundry	No	No	POS Web	Each	Default	0.00
Bookable Product	Postage	DeliveryOption	Sundry	Yes	No	POS Web	Each	Default	2.00
Bookable Product	Print at Home	Delivery Option	Sundry	No	Yes	POS Web	Each	Default	0.00

3. BOOKABLE PRODUCT DELIVERY OPTION REQUIREMENT

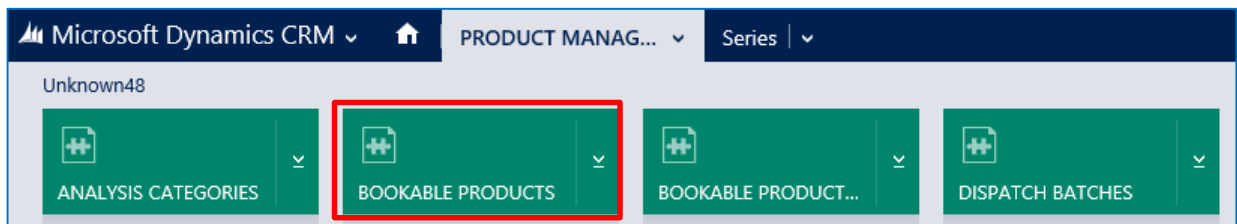
Not all products require delivery and therefore it is not always necessary for delivery information to be collected. Other products always require delivery or may need the option for delivery to take place. Functionality has been developed that prevents the need for a delivery option from being specified or alternatively if delivery information does need to be specified.

To set up this functionality, 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 selecting **Bookable Products** from the drop down.



- c) A list of the currently active Bookable Products will be displayed. Find and open the **Bookable Product** form that either needs delivery information to be collected or does not need this option to occur.
- d) With the Bookable Product form open, scroll down to the **Delivery Options** area of the form and complete the following.
- **Requires Delivery.** This field is used to determine whether the product requires a delivery option to be specified or not. 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.

Delivery Options	
Print at Home	No
Requires Delivery	No

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

4. PRINT AT HOME DELIVERY OPTION

The Print at Home Delivery Option allows products such as tickets to be printed at home rather than having them posted or collected. This section will assume that a Terminal for Print and Web, has already been implemented into the system by Green 4. Additionally a Channel, Sales Plan type of Other, Variants, Variant Price Lists, Channel Price Lists as well as Venue and Venue Configurations should have been set up. Information on these can be found in the Go CRM 2015 Product Management User Guide and Go CRM Venue Management User Guide.

For the Print at Home Delivery Option to be enabled a number of processes need to be completed. This includes setting up the Print at Home Delivery Option Product, Setting up the Channel to allow Print at Home and setting the Venues to allow Print at Home.

STEP 1: CREATE THE PRINT AT HOME DELIVERY OPTION PRODUCT

A print at home Delivery Option type Bookable Product must be created for print at home to be available.

The same instructions as in [section 2: Setting Up a Delivery Options type Bookable Product](#) can be followed to create a Print at Home Delivery Option Product.

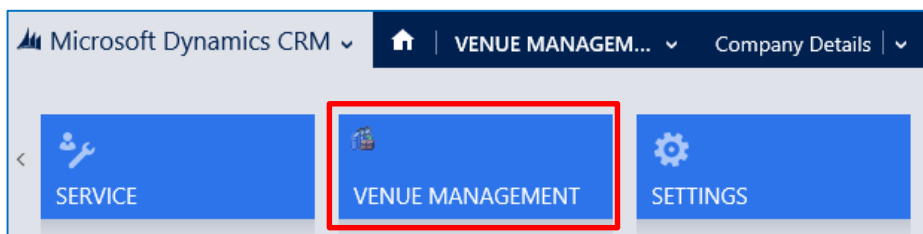
An example of the Print at Home Delivery Option Bookable Product is also shown below, highlighting the mandatory fields that must be completed.

Record Type	Name	Type	Category	Print at Home	Channels	Variants	Variants Price List	Price
Bookable Product	Print at Home	Delivery Option	Sundry	Yes	POS Web	Each	Default	0.00

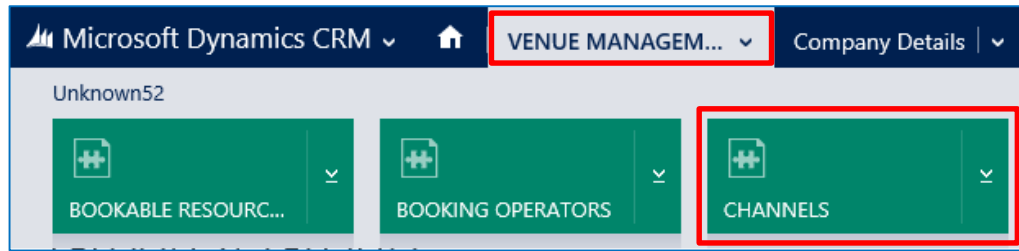
STEP 2: SETTING PRINT AT HOME ON THE CHANNEL

For each Channel where the option to Print at Home is available, it is required that the Channel setting is enabled. To do this complete the following:

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



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



- c) A list of Active Channels will be displayed. Open the Channel where the Print at Home delivery option is to be offered, for example the POS or Channel.

The screenshot shows the 'Active Channels' list in Microsoft Dynamics CRM. The list contains the following data:

Name	Self Service	Cash Account	Select Seats	Anonymous boo...	Allow Tabs	Description	MinutesInThePa...	MonthsInTheFut...	Future Days	Call Centre
F&B	No		No	Yes	Yes	F&B Channel	60	12	365	No
PORTAL	No		Yes	No	Yes	PORTAL Channel	60	12	365	No
POS	No		Yes	No	Yes	POS Channel	60	12	365	No
POS Stadium	No		Yes	No	Yes	POS Stadium	60	12	365	No
WEB	No		Yes	No	Yes	Web Channel	60	12	365	No
Web Stadium	No		Yes	No	Yes	Web Stadium	60	12	365	No

- d) Under the General section of the Channel form, select the following:

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

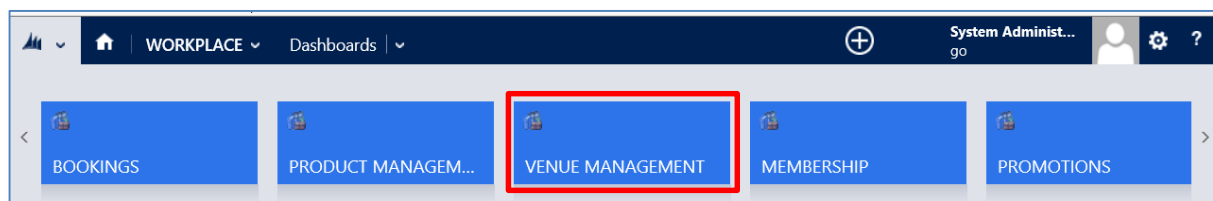
The screenshot shows the 'Enable Print at Home' form with the 'Yes' radio button selected.

- e) Select the Save icon in the bottom right hand corner of the screen, repeat the above process for each Channel that the Print at Home functionality is to be enabled on.

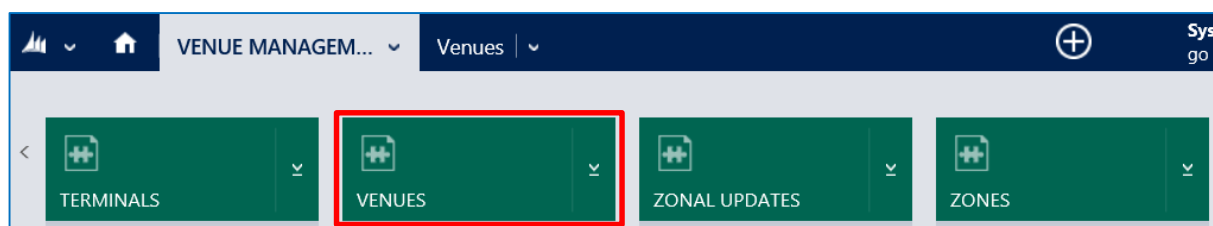
STEP 3: SETTING PRINT AT HOME FOR THE VENUE

For each Venue the print at home functionality is 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:

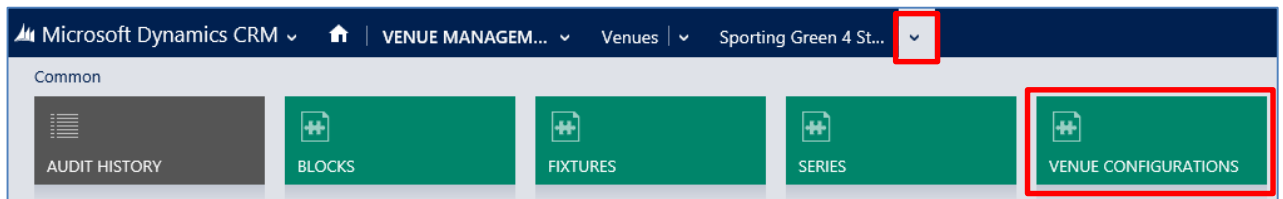
- a) Select or hover over the **Microsoft Dynamics CRM** tab before scrolling across the drop down list of the navigation bar and selecting **Venue Management**.



- b) Next, in the Venue Management area of CRM, select the **Venue Management** tab before scrolling across and selecting **Venues** in the navigation bar.



- c) A list of the currently Active Venues will be displayed. Open the Venue that the print at home functionality is to be enabled on which will then display the Venue form.
- d) In the Navigation bar select the small arrow next to the name of the venue and from the drop down, select **Venue Configuration**



- e) The Venue Configuration Associated View will be displayed, then open the Venue Configuration the Print at home delivery option is to be enabled on.
- f) Within the Venue Configuration form, ensure that the following two fields have been completed:
- **Print Tickets for Venue.** Select **Yes**.
 - **Allow Print at Home.** Select **Yes**.

Print Tickets for Veni:	Yes	Allow Print at Home	Yes
-------------------------	-----	---------------------	-----

- g) Select the Save icon in the bottom right hand corner of the screen. Repeat the above process for each Venue Configuration within your system that Print at home is to be enabled on.

5. ADDITIONAL CHARGES

This facility enables you to set up Additional Charges which can be added to a booking via the Payment Channel or to a specific event that has been flagged for an Additional Charge.

Additional Charges can be added to the following:

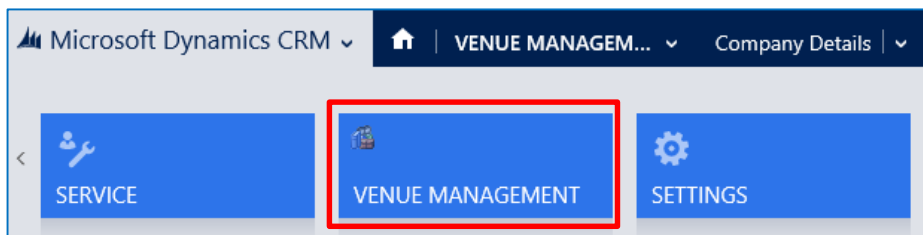
- A booking via the Payment Channel, for example a fee could be added to the booking if a Credit Card is used as the Payment Method. Please note that this charge is applied per booking made.
- A ticket bought for a specific event that has been flagged for Additional Charges. For example an event charge. Please note that this charge is applied per ticket purchased.

SETTING THE CHANNEL FOR A BOOKING CHARGE

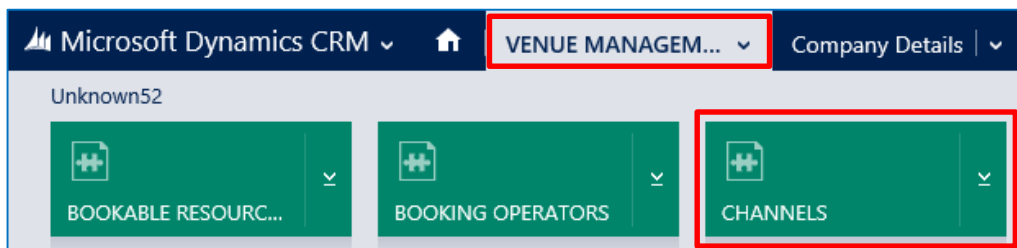
A Booking Charge can be set up on the Channel to add an Additional Charge when a product is purchased using the Channel and additionally when a particular Payment Method such as a Card is used to make a purchase.

To create the Additional Charge 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**.

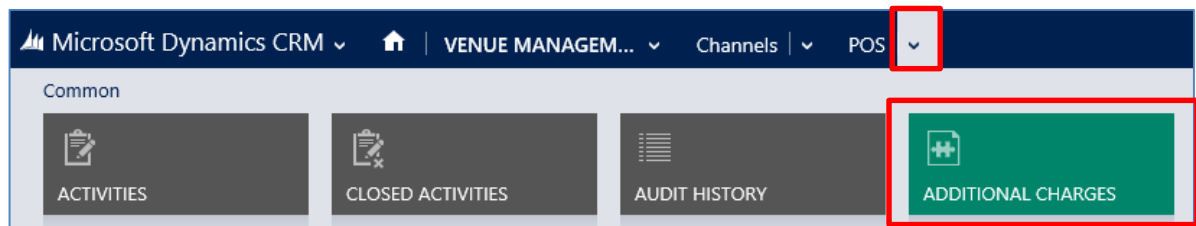


- c) A list of Active Channels will be displayed. Open the Channel where the Additional Charge is to be set up on, for example the POS Channel.

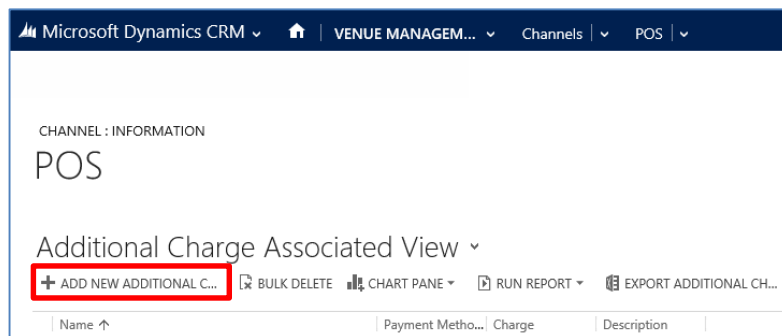
The screenshot shows the 'Active Channels' list in Microsoft Dynamics CRM. The list contains the following data:

✓	Name ↑	Self Service	Cash Account	Select Seats	Anonymous boo...	Allow Tabs	Description	MinutesInThePa...	MonthsInTheFut...	Future Days	Call Centre
	F&B	No		No	Yes	Yes	F&B Channel	60	12	365	No
	PORTAL	No		Yes	No	Yes	PORTAL Channel	60	12	365	No
	POS	No		Yes	No	Yes	POS Channel	60	12	365	No
	POS Stadium	No		Yes	No	Yes	POS Stadium	60	12	365	No
	WEB	No		Yes	No	Yes	Web Channel	60	12	365	No
	Web Stadium	No		Yes	No	Yes	Web Stadium	60	12	365	No

- d) Once the Channel form is open, select the small arrow next to the name of the Channel in the navigation bar. From the drop down, choose **Additional Charges**.



- e) The Additional Charge Associated View will be displayed, select **Add New Additional Charge** on the ribbon.



- f) A New Additional Charge form will be displayed. Complete the following details:

- **Name.** Enter the name of the charge e.g. Booking Fee
- **Description.** Enter a description of the charge.
- **Charge.** Enter the value of the charge.
- **Fee Per Ticket.** This must be set to **Yes** if setting up an Additional Charge for a ticket booking fee. This would be used if adding an Additional Charge to a Fixture or Series, for example an event charge. This would be used with a range of other settings that can be found in the [next section](#).
- **Channel.** This field will already be completed with the applicable Channel.
- **Payment Method.** If an Additional Charge is to be applied each time a Payment Method is used on the selected Channel, use the Lookup to select this Payment Method. For example, Card.

- g) Select **Save and Close** on the ribbon.

- 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.

SETTING UP AN EVENT (FIXTURE OR SERIES) FOR AN ADDITIONAL CHARGE

It is possible to set up an Additional Charge for both Fixtures and Series, which is relevant if setting up an Event Charge. This means that when the applicable Fixture or Series is purchased, an Additional Charge will be incurred on top of the standard price.

STEP 1. CREATE THE ADDITIONAL CHARGE ON THE CHANNEL

Firstly the Additional Charge needs to be created on the Channel as is demonstrated in the [above section as a Booking Charge](#). This will determine the cost of the Charge which will be additional to the standard price of the Fixture or Series.

The **Fee Per Ticket** flag within the Additional Charge form must be set to **Yes** and the **Payment Method** field should not be completed.

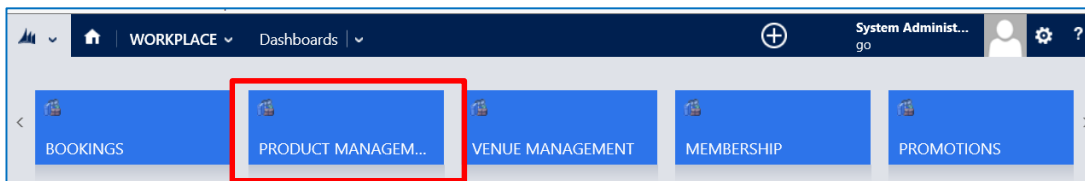
The example below shows the mandatory fields that should be completed in the Additional Charge form when creating an Event Charge.

Name	Charge	Fee Per Ticket	Channel
Event Charge	Enter the Event Charge for the Fixture or Series here. For example £2.00	Yes	This field will be automatically completed with the relevant Channels.

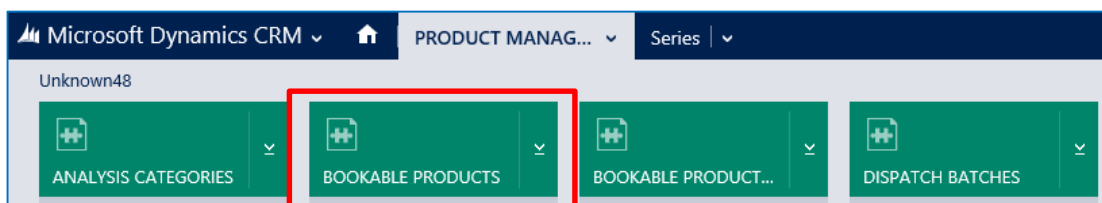
STEP 2. SET THE BOOKABLE PRODUCT FORM

The Bookable Product that represents the Fixture or Series incurring the Additional Charge must have the **Ticket booking fee** flag set to **Yes**. To do this, complete the following:

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



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

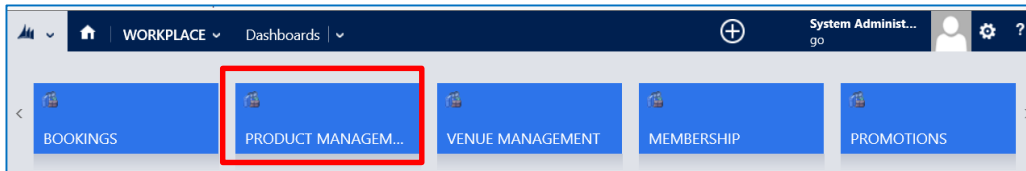


- A list of the currently active Bookable Products will be displayed. Select and open the Bookable Product that represents the Fixture or Series that is to incur the Additional Charge.
- Within the Bookable Product form, ensure the **Ticket booking fee** flag is set to **Yes**.
- Select the Save icon in the bottom right hand corner of the screen.

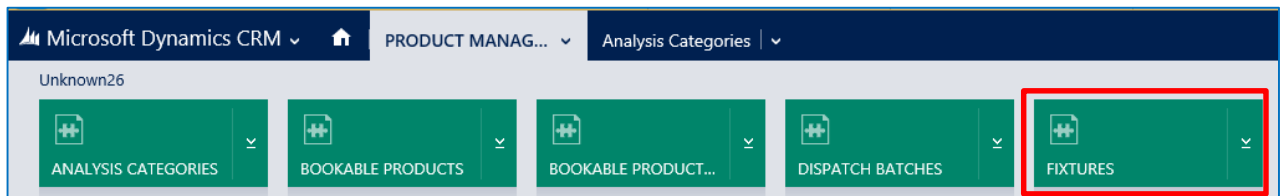
STEP 3. SET THE FIXTURE FORM

The Fixtures to incur the Additional Charge must have the **Ticket Booking Fee** flag set to **Yes** within the Fixture form. To do this, complete the following:

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



- Next, in the Product Management area of CRM, select the **Product Management** tab before scrolling across the drop down list of the navigation bar and selecting **Fixtures**.



- A list of currently Active Fixtures will be displayed, open the Fixture that is to incur the Additional Charge.
- Within the Fixture form ensure the **Booking ticket fee** field is set to **Yes**.

Ticket booking fee	Yes
--------------------	-----

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

HOW ADDITIONAL CHARGES ARE DISPLAYED IN THE POS

Any Additional Charges that have been applied to a Channel, such as a [Booking Charge](#) will be displayed as Channel Charges in the POS shopping basket, as is shown in the below example.

Total Price	£20.00
Channel Charges	£1.00
Total to pay	£21.00

Any Additional Charges that have been applied as an [Event Charge](#) to a Fixture or Series, will be displayed as Ticket Charges in the POS shopping basket as is shown below,

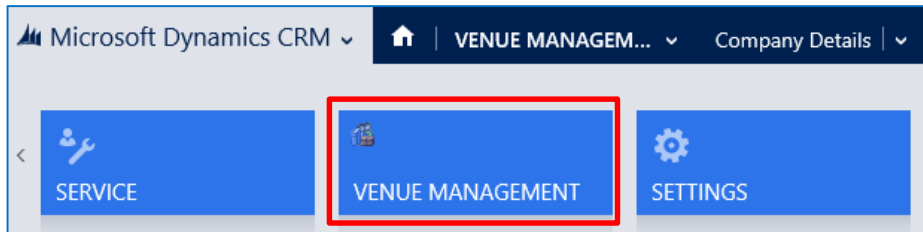
Total Price	£45.00
Ticket Charges	£2.00
Total to pay	£47.00

6. USING MULTIPLE ADDRESSES

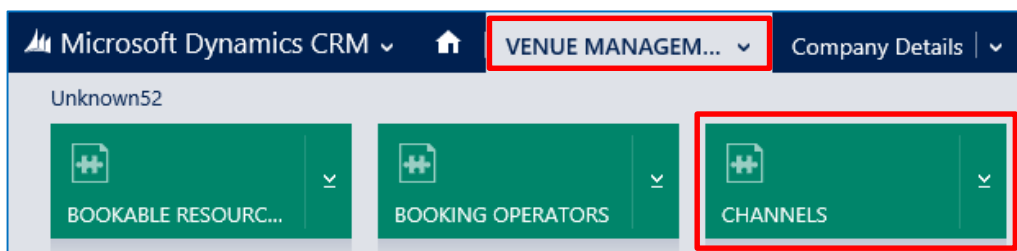
The channels selected (For example POS and Web) can be configured to allow the use of Multiple Addresses for billing and delivery.

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

- a) 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 Active Channels will be displayed. Open the Channel which is to be configured to allow the use of Multiple Addresses for billing and delivery, for example the POS Channel.

The screenshot shows the 'Active Channels' list in Microsoft Dynamics CRM. The list contains the following data:

✓	Name ↑	Self Service	Cash Account	Select Seats	Anonymous boo...	Allow Tabs	Description	MinutesInThePa...	MonthsInTheFut...	Future Days	Call Centre
	F&B	No		No	Yes	Yes	F&B Channel	60	12	365	No
	PORTAL	No		Yes	No	Yes	PORTAL Channel	60	12	365	No
	POS	No		Yes	No	Yes	POS Channel	60	12	365	No
	POS Stadium	No		Yes	No	Yes	POS Stadium	60	12	365	No
	WEB	No		Yes	No	Yes	Web Channel	60	12	365	No
	Web Stadium	No		Yes	No	Yes	Web Stadium	60	12	365	No

- d) With the applicable Channel Open, ensure the **Select Delivery Address** flag is set to **Yes**.



When the customer makes a purchase through the POS, if the **Select Delivery Address** option has been set to **Yes** for the channel, the user will be prompted to select a delivery address for the customer when payment is added. Please note that 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.

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

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