CRM 2015 PRODUCT MANAGEMENT USER GUIDE 3.7

green4 SOLUTIONS

THE QUEEN'S AWARDS FOR ENTERPRISE: 2014

CONTENTS

ABOUT THIS DOCUMENT

This document has been prepared as a User Guide for Go's Product Management.

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DOCUMENT CONTROL

Version	Date	Change	Initials
V1.0	11/06/2015	This is a new document	JW
V1.1	17/06/2015	New Sections added: Allowing Ticket Moves/Upgrades Printing Individual Fixture Tickets for a Series Allowing Partial Series Sakes	JW
V1.2	26/06/2015	Updated with the functionality to Add a Discount Percentage & Expiry Time for a Reservation	JW
V1.3	28/10/2015	Updated with the Priority Provider functionality	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

PRODUCT MANAGEMENT INTRODUCTION

Go offers great flexibility, allowing many different types of products to be set up within CRM which can then be sold. This User Guide provides instruction, showing what is required to place a product on sale.

Included in this guide are instructions relating to the setup which must be completed when placing a product on sale within CRM such as the creation of Variant Types, Variant Price Lists, Sales Plans and Channel Price lists.

Additionally this User Guide provides instruction on the configuration and management of the many different types of products that can be set up within CRM such as; Fixtures, Series, Stock, Auto- Scheduled, Scheduled, Memberships and Pass products.

Furthermore this guide covers a wide range of functionality which can be set up and used in association with the products to further enhance their operation.

This guide does assume that certain Infrastructure (channels, payment methods, etc.) and Venues (venue configuration, blocks, etc.) for the system have already been created. For information on how to create these, see the GO CRM 2015 Infrastructure User Guide and the GO CRM 2015 Venue Management User Guide.

The images below give a brief overview of the flow and layout of this document as well as any relevant descriptive summaries.

1.SETUP

1.VARIANT TYPES

Variant Types are the different variants of Bookable Product that can be purchased. e.g. for a Fixture/Series: Adult, Junior or senior tickets. For retail products such as clothing: Small, Medium or Large sizes.

A Variant Type only needs to be created once and can then be reused.

2. VARIANT PRICE LIST

Variant Price Lists are selected in the Variant and Pricing section of the Bookable product form. This is where the price of the product is entered and which are then subsequently entered into Channel Price Lists.

3. SALES PLANS

All products must be linked to a Sales Plan to appear on Sale. Sales Plans assist with the management and administration of placing products on sale. There are three types of Sales Plans; Fixture, Series and Other.

4. CHANNEL PRICE LISTS

Channel Price Lists control the times of sale and potentially the different pricing requirements of a Product. They are linked to Sales Plans and in return, the Channel Price Lists link the Channel that the product is to be sold and the Variant Price List together. For each Channel and Variant Price List combination on the Bookable Product form, a new Channel Price List is needed.

2. PRODUCT CONFIGURATION

1. FIXTURES

Fixture type products not only represent individual sports games but are also used for events such as music concerts.

2. SERIES

A Series represents a group of Fixtures, for example Season Tickets. Fixtures must be added to a Series, even if they are being sold individually.

3. STOCK

Stock type products are used to represent a number of items that can be placed on sale. For example retail items such as clothing etc, would be created as Stock type products.

4. AUTO SCHEDULED

Auto Scheduled type products are set up to take place at a certain time on selected dates. They are relevant to recurring activities such as Guided Tours.

5. SCHEDULED

Scheduled type products are controlled by an administrator using the Scheduler. These products can be scheduled for dates and times which can be selected and are often used for products such as Lesson sessions.

6. MEMBERSHIPS

A Membership product is created to include access to specified activities and/or events. It is typically for a specified period of time such as a 12 month Annual Membership.

7. PASSES

Pass type products act as a ticket but can be purchased with either a specific usage date assigned or alternatively activiated at a date and time in the future.

Usage within or to a Venue is often determined by the terms of the pass.

3. FUNCTIONALITY AND USAGE

1. DELAYED PURCHASE

The Delayed Purchase functionality stops selected products from being purchased within a predefined period of time. This can be used on Stock, Pass, Scheduled and Auto Scheduled type products.

2. UPSELLING PRODUCTS (ADDITIONAL PRODUCTS)

The Upselling functionality allows for the user to be presented with a list of additional products when they add pre defined products into their shopping cart. This upselling then gives the customer the option to add another product to their shopping cart.

3. RESERVE CAPACITY

The Reserve Capacity functionality makes it possible to remove capacity from your resource. This may be used if the maximum number of bookings taken needs to be decreased due to factors such as a lack of staff or ongoing maintenance. This is used for Scheduled and Auto scheduled type products.

4. NEGATIVE RESERVE CAPACITY

The Negative Reserve Capacity functionality allows for a temporary increase in the capacity of a resource. This is used for Scheduled and Auto scheduled type products.

5. MEMBERSHIP PHOTO

This functionality allows for a photo to be taken if a photo needs to be captured when creating a membership type product.

6. MEMBERSHIP NUMBER

This functionality gives the option for a Membership Number to be either auto generated or manually entered when creating a Membership type product.

7. ENTITLEMENTS

The Entitlements functionality allows customers who are contained within a Marketing List to obtain a preferential price for a product for a nominated number of times. It is also possible for a Beneficiary to use an Entitled customers preferential price. Entitlements can be appiled to Stock, Scheduled, Auto Scheduled, Fixture and Series type products.

8. CROSS SELLING PRODUCTS

The Cross Selling functionality allows one product to be cross sold and exchanged for another. This enables the end customer to swap a product for another. Cross Selling can be used on coupon, voucher, stock and pass type products.

9. SEASON TICKET BUYBACKS

Season Ticket Buyback functionality allows for a Season Ticket Holder to exchange their Season Ticket for loyalty points when they are unable to attend a Fixture. The Season Ticket Holders seat can then be placed on general sale by the club or organisation.

10. ADDING A FIXTURE TO SEASON TICKET CARDS

This functionality allows for a Fixture to be added to an active Season Ticket card. Therefore any Fixtures that are not part of a Season Ticket and can be brought individually, can be added to a Season Ticket card upon purchase.

11. PLACING A CUSTOMER ON HOLD

This functionality prevents a customer from either purchasing a product, being allocated a ticket or allowing them access to a venue due to being on hold.

12. RESERVATIONS

This functionality allows a product such as a Fixture or Series to be reserved for a customer. It is often used to reserve cup fixtures for Season Ticket Holders or for existing Season Ticket Holders to have their Season Ticket seat reserved for the following season.

13. ALLOWING TICKET MOVES/UPGRADES

The Upgrade/Move options allows Season Ticket Holders to Upgrade or Move their seat booking on a match by match basis. This can be due to reasons such as a Junior ticket being upgraded to an Adult or alternatively a Season Ticket holder wanting to move their seat closer to a friend for a individual fixture.

14. PRINTING INDIVIDUAL FIXTURE TICKETS FOR A SERIES

On occasion it may be necessary to print a ticket for an individual Fixture purchased as part of a Series ticket. This may occur if a Season Ticket holder forgets there Season Ticket so an individual Fixture Ticket must be printed so that they can access the Venue.

15. ALLOWING PARTIAL SERIES SALES

It is possible to allow a customer to purchase a Series ticket when the seat they have requested is not available for all Fixtures in the Series. When the customer attempts to purchase the Series ticket, they will be warned which Fixtures the selected seat is unavailable for. The customer will be issued with a Coupon to purchase a ticket for any matches that their Season Ticket is unavailable for.

1. SETUP

The setup section of this document gives instruction on the initial setup that must take place before it is possible to place a product on sale. This setup section gives instructions on how to create the following:

VARIANT TYPES → VARIANT PRICE LISTS → SALES PLANS → CHANNEL PRICE LISTS

1.1. VARIANT TYPES

VARIANT TYPES → VARIANT PRICE LISTS → SALES PLANS → CHANNEL PRICE LISTS

Variant Types describe the type of Bookable Products that can be purchased. For example Adult, Junior and Senior may be Variant Types for a Fixture or a Series type Bookable Product, whereas for a Stock type product, such as a piece of clothing, the Variants could be: Large, Medium or Small. A product may not require any of these variant types so 'Each' could also be used.

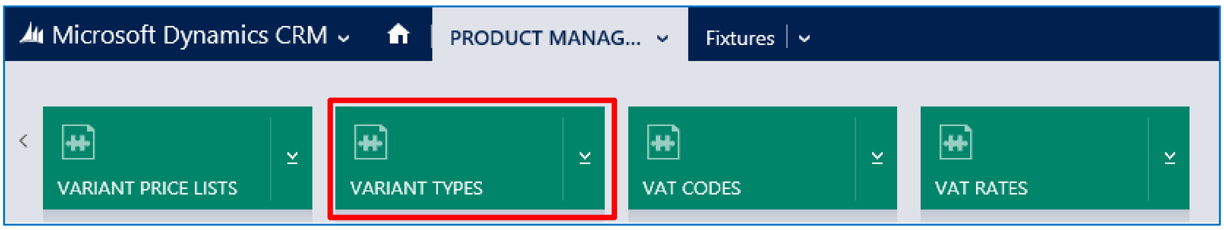
When a Variant Type has been created in Go's system, it can be reused for different product types which means they do not need to be recreated every time. This means that it is not necessary to create a set of Variant Types for each Bookable Product that is added to the system. Before setting up a new Variant Type, check that it does not already exist.

The Variant Types are added in the Variant and Pricing section of the Bookable Product form having been chosen from the drop down list within this form.

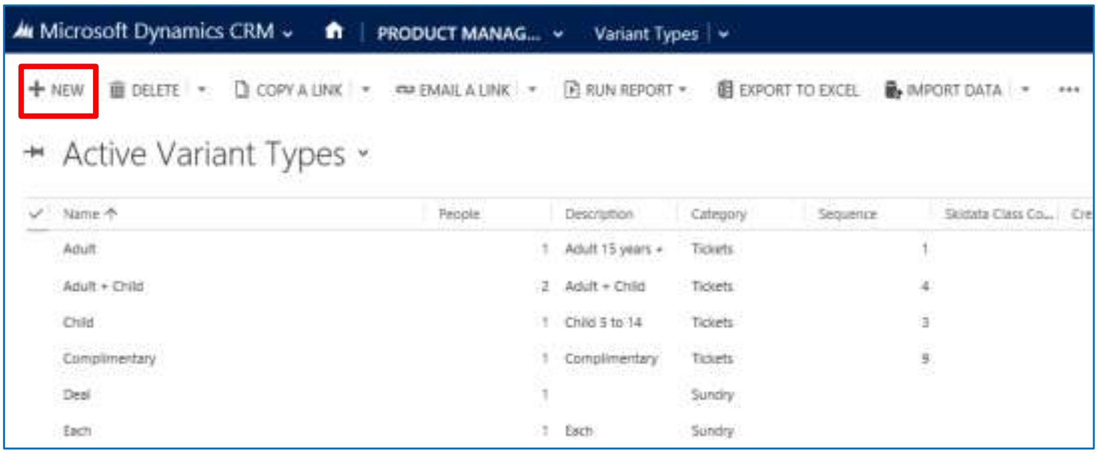
To create a new Variant Type record:

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**.

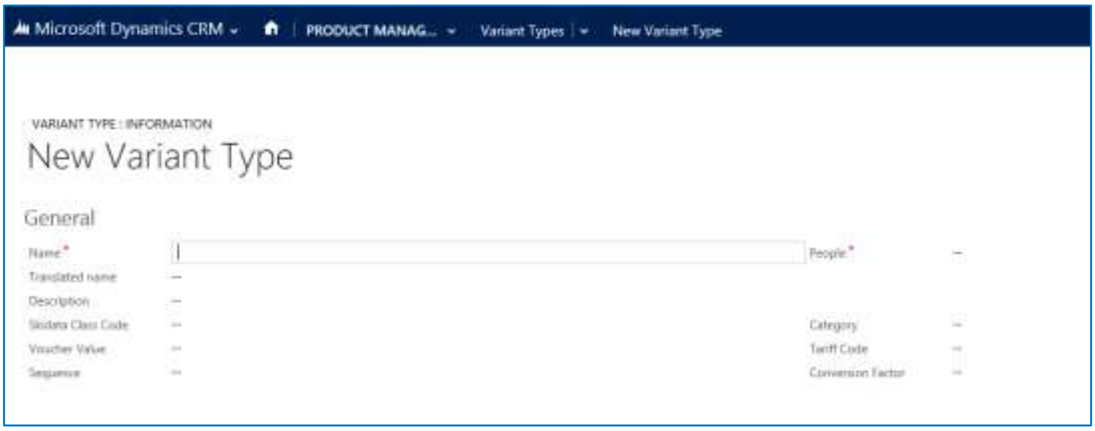
b) Next, in the Product Management area of CRM, select the **Product Management** tab before scrolling across the drop down list of the navigation bar and selecting **Variant Types.**



c) A list of currently Active Variant Types will be displayed, remember that a Variant Type only needs creating once as it can be reused. To create a New Variant Type, choose **New** on the ribbon.



d) A blank Variant Type form will be displayed, complete the following details:



- **Name.** Enter a name for the Variant Type e.g. Small, Medium, Large, Each, Adult, Junior or Senior.
- **Translated Name.** This field is only used when the system is being translated into another language. Multiple translations can be added in the one field. See the Set up for Multi Lingual using the Translation Field
- **Description.** If applicable, enter a description of the Variant Type.
- **Sequence.** If applicable enter a sequence number which shows the order the Variant Types are to be displayed.
- **People.** Enter the number of people included in the Variant Type. For example, enter 1 for a Variant Type of Adult, Junior or Senior as these represent one person. Alternatively, enter 4 if creating a "Family of 4" Variant Type. If more than one person is included in the Variant Type it will be necessary to create the appropriate Variant Type Component records (see Variant Type Components for details).
- **Category.** If applicable, use the Look Up to find or create a new Category to place the Variant Type under. For example, a category named Tickets could be created to keep all Variant Types associated with tickets within it. Alternatively a Category of Retail could be created to keep all Variant Types associated to Retail products within. By categorising this, it will make it easier to find the appropriate Variant Type when adding them in the Bookable Product.

Note. All other fields in the Variant Type form that have not been described above do not need to be completed/changed.

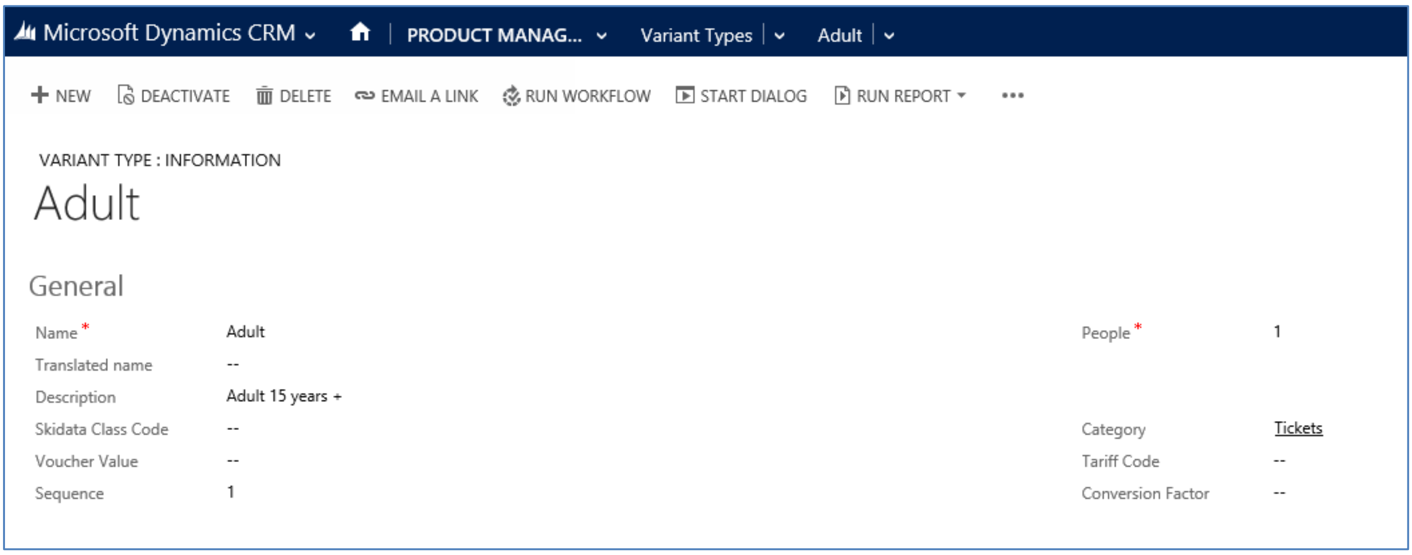
e) Select **Save and Close** on the ribbon to save the Variant Types. Repeat the above process for each Variant Type that needs adding to the system.

EXAMPLE OF VARIANT TYPE RECORDS CREATED

A number of Variant Types have been created as examples for this document and are displayed in the table below:

Record Type	Name	People	Category
Variant Type	Adult	1	Tickets
Variant Type	Junior	1	Tickets
Variant Type	Senior	1	Tickets
Variant Type	Family	4	Tickets
Variant Type	Small	1	Retail
Variant Type	Medium	1	Retail
Variant Type	Large	1	Retail
Variant Type	Each	1	Sundry

Example of a completed Variant Type form:

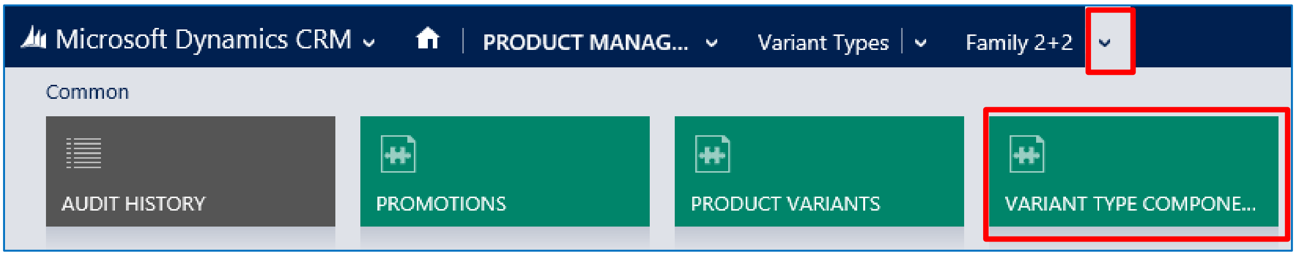


VARIANT TYPE COMPONENTS

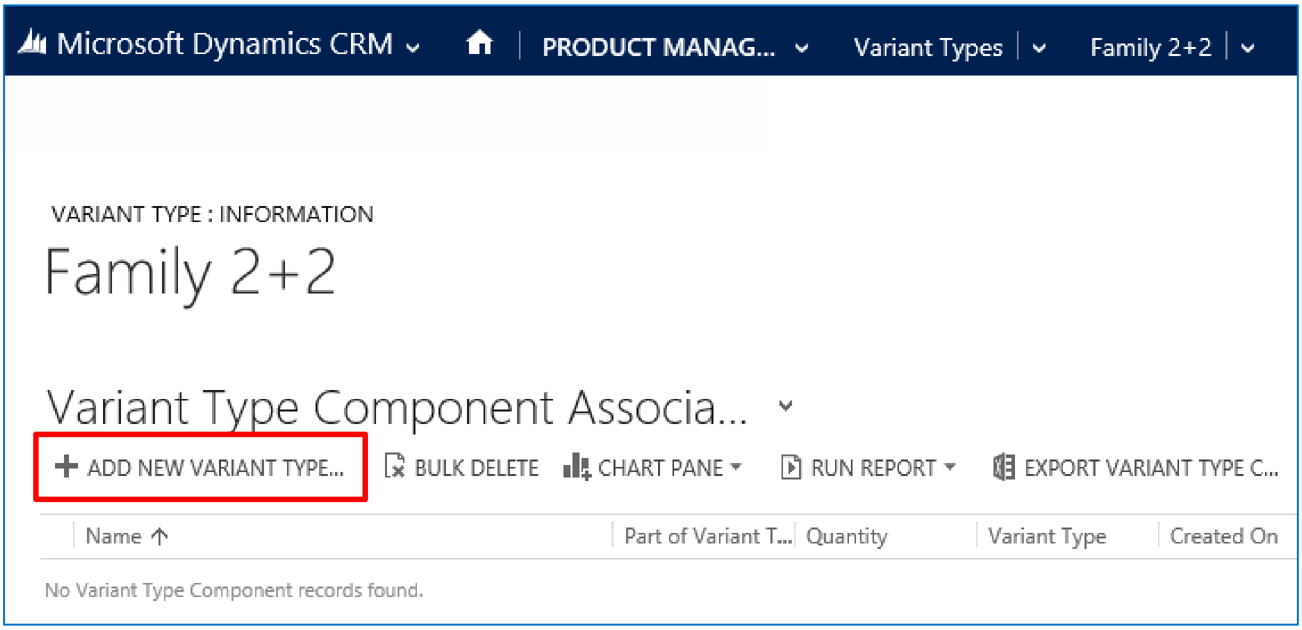
If a Variant Type includes more than one person, use the associated Variant Type Components entity to define the breakdown of the people included, for example the number of Adults and Juniors included on a family ticket. This will ensure that when tickets are printed the correct Variants will be displayed on the ticket.

To create a Variant Type Components record:

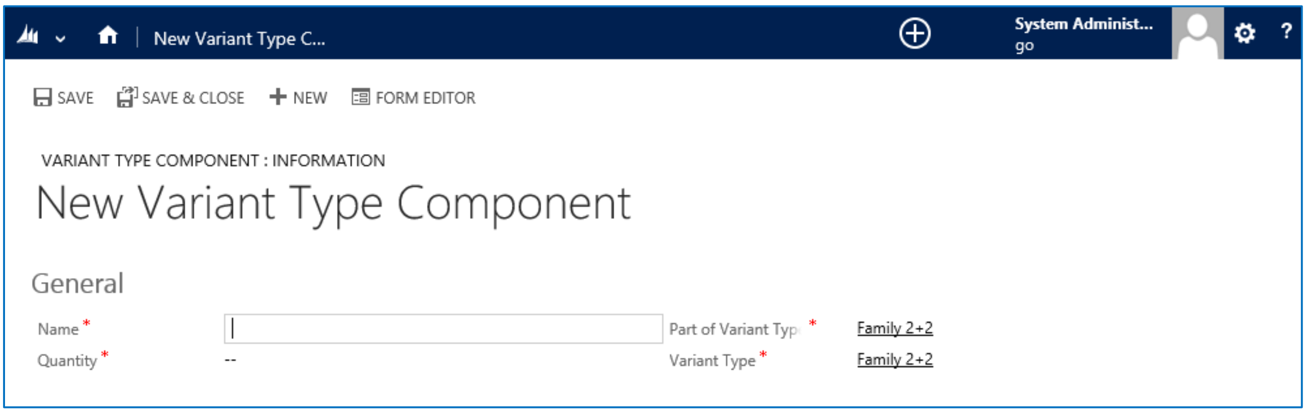
a) With the Variant Type form open, select the small arrow on the Navigation bar that is next to the name of the currently opened Variant Type before selecting Variant Type Components.



b) The Variant Type Components view will be displayed. Select **Add New Variant Type Component** on the ribbon.



c) A blank Variant Type Component form will be displayed, complete the following:



- **Name.** The name of the Variant Type Component .e.g. Adult or Junior.
- **Quantity.** The number of people included in the Variant Type Component, e.g. 2 Adults for a family ticket.

- **Part of Variant Type.** The name of the parent Variant Type will already be displayed, this does not need changing.
- **Variant Type**. Use the Look Up to select the Variant Type representing the component. For example, choose the Adult Variant Type if defining the number of Adults included on a family ticket.

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

e) Repeat the above steps to create a new Variant Type Component record for each element included in the variant type, for example in a family ticket a component for Adults and a component for Juniors will need creating.

1.2. VARIANT PRICE LISTS

VARIANT TYPES → VARIANT PRICE LISTS → SALES PLANS → CHANNEL PRICE LISTS

A Variant Price List is where the cost of a product is entered for the identified Variant Types in the Variant and Pricing section of the Bookable Product form. The Variant Price Lists are also subsequently linked to the Channel using the Channel Price List entity.

It is recommended that you create a Variant Price List for each product type that you sell in order to keep track of where pricing for a product is situated. For example, separate Variant Price Lists will need to be created if for example a sports club offers Early Bird and then Standard Season Ticket sales as well as Match Day tickets. Moreover, if a Leisure attraction offers various types of products such as General Admission, Special Events or Activities, separate Price Lists should be created for each of these. Additionally separate Price Lists would need creating for Stock, Retail and F&B products. The reason is that for differing sets of prices a new Variant Price List will need to be created.

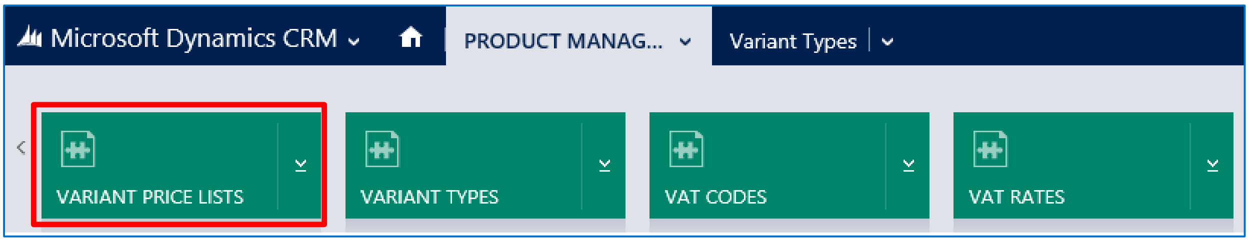
It must also be noted that it may be necessary to have different Variant Price Lists for the same product depending on the Channel that it is being sold on. This is needed if a product has differing prices depending on which Channel it is brought from, for example a product is cheaper to purchase on the Web than the POS. This would mean two Price Lists would need creating for that product, one for the Web and the other for the POS.

Additionally it may also be necessary to have different Price Lists for the same product, for example, if a set of fixtures have different classes of matches, with some being more expensive than others. A number of Variant Price Lists would need creating to represent the contrasting prices for each class of match.

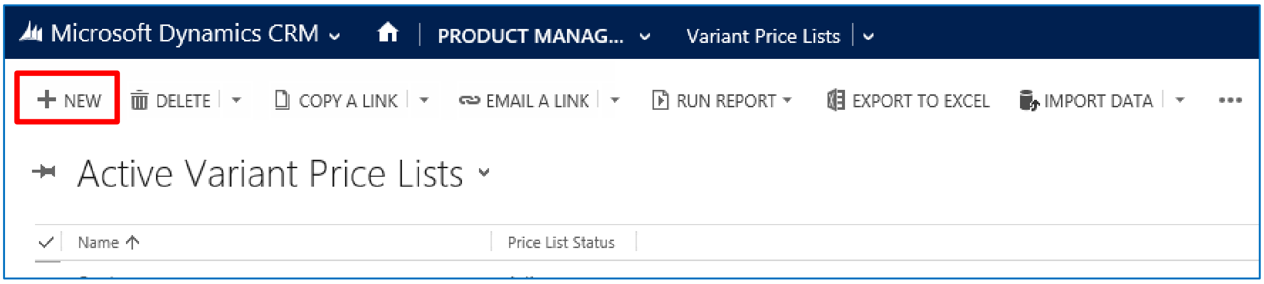
To create a new Variant Price List:

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**.

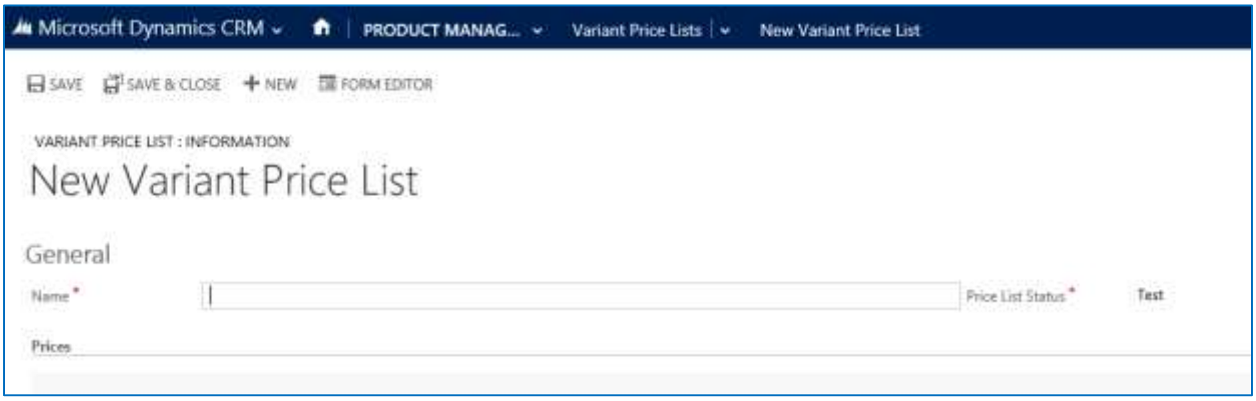
b) Next, in the Product Management area of CRM, select the **Product Management** tab before scrolling across the drop down list of the navigation bar and selecting **Variant Price Lists.**



c) A list of currently active Variant Price List view will be displayed. Select **New** on the ribbon.



d) The Variant Price List form will be displayed. Complete the following details:



- **Name.** Enter a name for the Price List.
- **Price List Status.** Select the Price List status from the drop-down list. Only price lists with a status of **Active** will be used to provide pricing information.

e) Select **Save and Close** on the ribbon, repeat the above process for each Variant Price List that needs to be created.

EXAMPLE OF VARIANT PRICE LIST RECORDS CREATED

A number of Variant Price Lists have been created as examples for this document and are displayed in the two tables below. They are split into Leisure and Sport examples. It can be noted that two Variant Price List have been created for some of the products here, this is because different channels offer different prices for the same product.

The Variant Price Lists are then added to the Channel Price Lists, the Channel Price List section of this document continues by using the below Variant Price List examples to show how they can be added to differing Channel Price Lists.

Leisure:

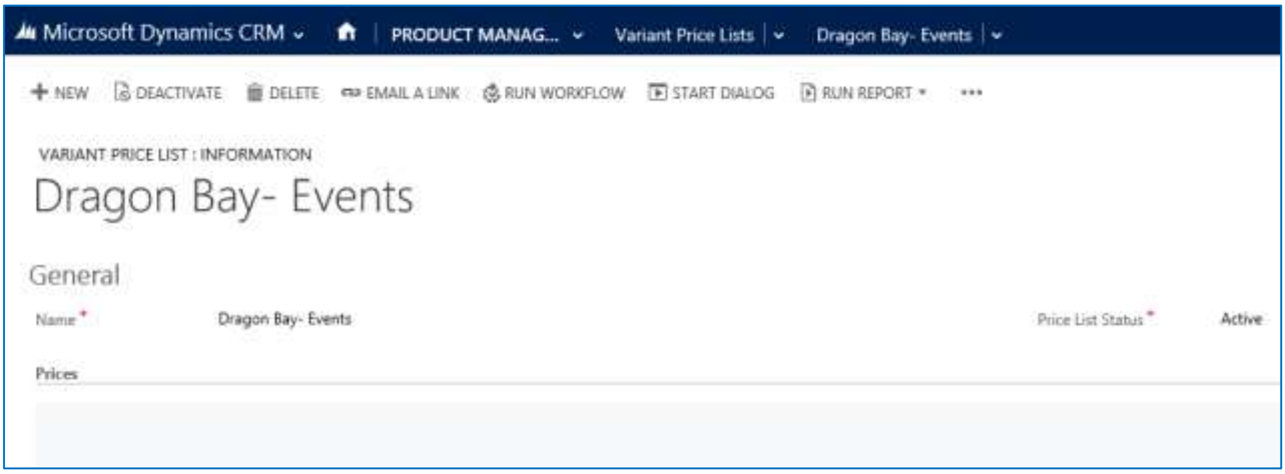
Record Type	Name	Price List Status	Used for
Variant Price List	Events- Web	Active	Event ticket purchases made via the Web (Cheaper than POS)
Variant Price List	Events - POS	Active	Event ticket purchases made via the POS
Variant Price List	Retail	Active	Retail Products (Same pricing both POS/Web)
Variant Price List	Admission - Web	Active	Admission pass purchases made via the Web (Cheaper than POS)
Variant Price List	Admission - POS	Active	Admission pass purchases made via the POS
Variant Price List	F&B	Active	F&B products (Same pricing both POS/Web)
Variant Price List	Memberships - Web	Active	Membership Pass purchases made via the Web (Cheaper than POS)
Variant Price List	Memberships - POS	Active	Membership Pass purchases made via the POS
Variant Price List	Activity	Active	An Activity being purchased; for example for a specific show, tour or 'experience'

Sport:

Record Type	Name	Price List Status	Used for
Variant Price List	Cup Fixtures	Active	Cup fixtures purchases (Same pricing both POS/Web)
Variant Price List	Match Day Prices	Active	Match day purchases of tickets (Price increase on both POS and Web on match day)
Variant Price List	Standard Prices - Web	Active	Standard Match Ticket for purchases made via the Web (Cheaper than POS)
Variant Price List	Standard Prices - POS	Active	Standard Match Ticket for purchases made via the POS
Variant Price List	Season Ticket – Early Bird Price - Web	Active	Early bird Season Ticket purchases made via the Web (Cheaper than POS)
Variant Price	Season Ticket – Early Bird Price - POS	Active	Early bird Season Ticket purchases made via the POS

Variant Price List	Season Ticket – Standard Prices - Web	Active	Standard Season Ticket purchase made via the Web (Cheaper than POS)
Variant Price List	Season Ticket – Standard Prices - POS	Active	Standard Season Ticket purchase made via the POS
Variant Price List	Season Ticket – Renewal Prices - Web	Active	Season Ticket Renewal Prices made via the Web (Cheaper than POS)
Variant Price List	Season Ticket Renewal Prices - POS	Active	Season Ticket Renewal Prices made via the POS
Variant Price List	Away v's Green 4 FC	Active	Pricing for away match (Same price POS and Web)
Variant Price List	Stock	Active	Stock Products pricing (Same price POS and Web)
Variant Price List	Retail	Active	Retail Products pricing (Same price POS and Web)
Variant Price List	F&B	Active	F&B product pricing (POS only)

Example of a completed Variant Price List form:



1.3. SALES PLANS

VARIANT TYPES → VARIANT PRICE LISTS → SALES PLANS → CHANNEL PRICE LISTS

The Sales Plan functionality has been developed to aid the setting up of Series and Fixtures, and managing changing price regimes, whilst effectively removing the need to set up Channel Price Lists against each Series and Fixture.

Sales Plan functionality assists with the management and administration of putting products on sale and have to be used for all product types.

The setting up of a Sales Plan is mandatory and needs to be done in advance of putting Fixtures, Series or Other products on sale. Different types of Sales Plans can be set up, which include, Fixtures, Series and Other. The type 'Other' would be used for all other types of products being set up in the system that are not Fixtures and Series; e.g. Stock, Scheduled, Auto-Scheduled, Membership and Pass products.

Multiple Sales Plans can be created, to represent different classes of fixtures or Series, for example Gold, Silver or Bronze classes. Alternatively, separate Sales Plans may be created depending upon the competition of the Fixture or Series and could therefore be split into different types such as league or cup games.

Only one Sales Plan of type Other needs to be created, all other product types that are created which are not Fixtures or Series will fall into this Sales Plan. This general Sales Plan type of Other must be entered into the **Company Details** form of CRM in the **Current Sales Plan** field. This allows the Company Details entity and this general Sales Plan, to provide a single starting point for editing Channel Price Lists for product types, other than those that are fixtures and Series.

The benefits offered by the Sales Plan functionality is described below:

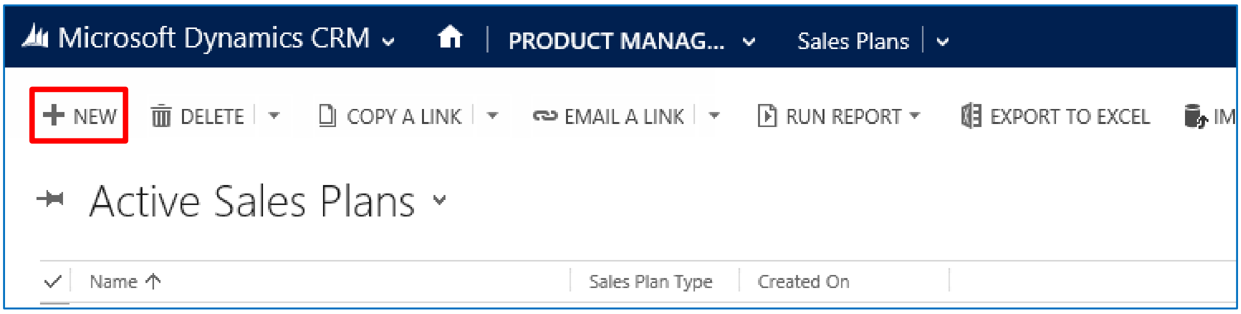
- Facilitates the set-up of a plan for selling specific occurrences e.g.
  - Seasonal events
  - Early bird specials
  - Discounts automatically applied to purchases made by members
  - Early purchase offers for a specified audience
  - Limited product purchases for a specified audience
- Is linked to Channel Price Lists that define the number of days and/or hours before the start of an item going on sale and the number of days and/or hours before the end of that item going off sale. The number of days can be negative i.e. -1 day to leave an item on sale 1 day after the end date
- Reusability – Sales Plans can be set up and reused when new fixtures or events are put on sale.

To create a new Sales Plan, complete the following:

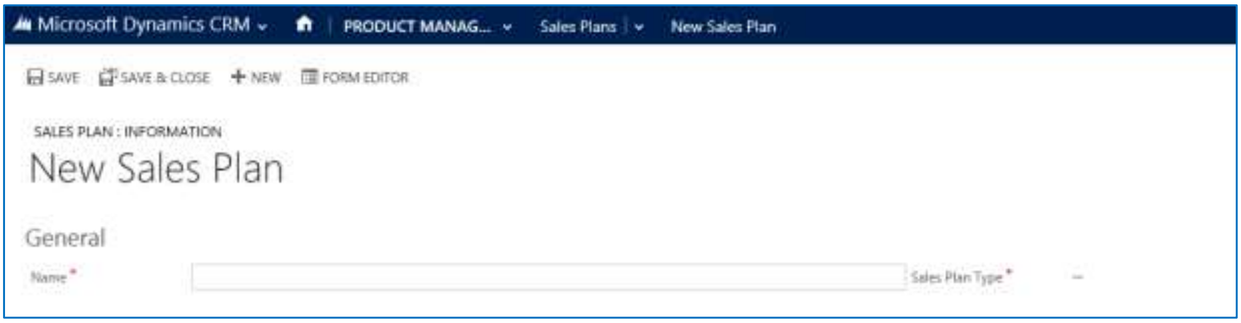
a) Select or hover over the **Microsoft Dynamics CRM** tab before scrolling across the drop down list of the navigation bar and selecting **Product Management**.

b) Next, in the Product Management area of CRM, select the **Product Management** tab before scrolling across the drop down list of the navigation bar and selecting **Sales Plans.**

c) A list of any currently active Sales Plans will be displayed, select **New** in the ribbon.



d) A blank Sales Plan form will be displayed. Complete the following:



- **Name.** Enter a name for the Sales Plan.
- **Sales Plan Type.** From the drop down menu select the Sales Plan Type. Choose from:
  - **Fixture**. For Fixture type products create a Fixture type Sales Plan.
  - **Series.** For Series type products create a Series type Sales Plan.
  - **Other.** For all other type of products, e.g. Stock, Scheduled, Auto-scheduled, Membership and Pass products create an Other type Sales Plan. Please note that only one Sales Plan type of other needs to be created and it should be added to the **Current Sales Plan** field of the **Company Details** form in CRM.

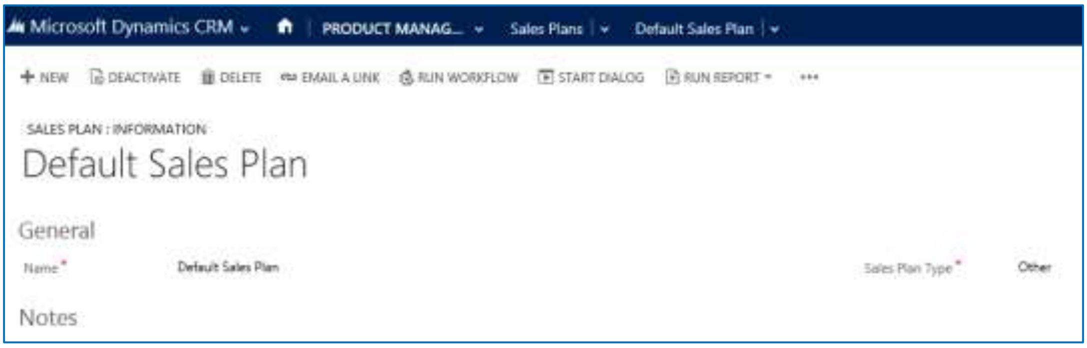
e) Select **Save and Close** on the ribbon.

EXAMPLE OF SALES PLANS RECORDS CREATED

Three Sales Plans have been created as examples for this document and are displayed in the table below. Channel Price List must be then linked to each Sales Plan, this can be seen in the next section where this example continues.

Record Type	Name	Type
Sales Plan	Fixture Sales Plan	Fixture
Sales Plan	Series Sales Plan	Series
Sales Plan	Default Sales Plan	Other (Linked to the Company Details form)

Example of a completed Sales Plan form:



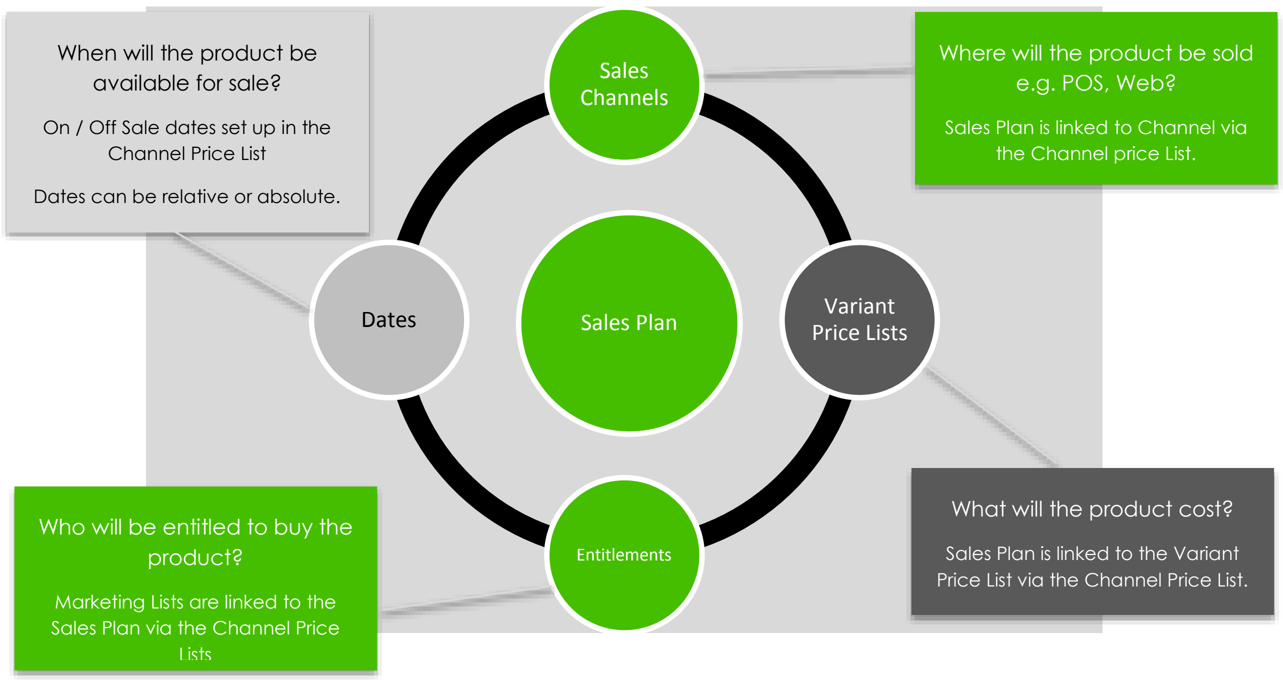
1.4. CHANNEL PRICE LISTS

Linked to Sales Plans are Channel Price Lists. Channel Price Lists link the Channel and Variant Price Lists together, and for each Channel and Variant Price List combination in a Bookable Product a new Channel Price List must be created. The Channel Price List also controls when a products goes on and off sale.

Additionally, Channel Price lists are where Entitlements are set up, this being the process to allow customers, who are contained in a Marketing List, to obtain a preferential price for a product.

Different fields within the Channel Price List need completing depending on the type of product that is to be placed on sale. For example different fields within the Channel Price List need completing for Fixture and Series type products compared to Stock, Membership, Pass, Scheduled or Auto Scheduled type products.

The below diagram illustrates how Sales Plans are the central component to the Channel Price Lists. Linked to a Sales plan can be multiple Channel Price Lists which in return control; when the product will be available for sale, the Channels the product is being sold upon, the Price List of the product and who will be entitled to buy the product.



To create a new Channel Price List complete the following:

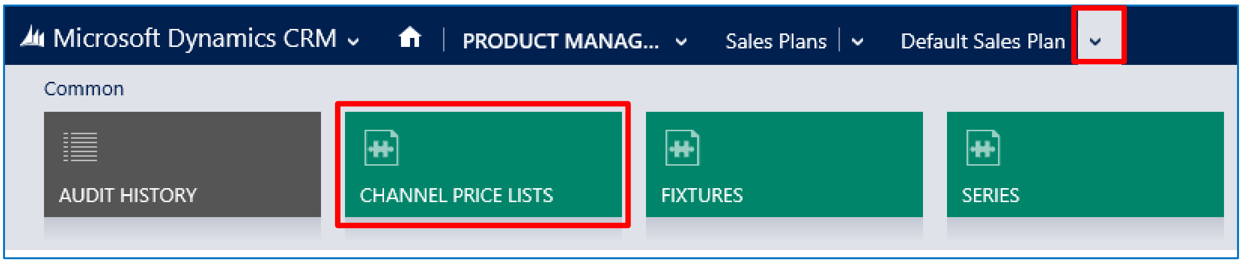
Note. For different types of Products differing fields needs completing in the Channel Price List. The fields that need to be completed for particular types of Bookable Products are made clear below.

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**.

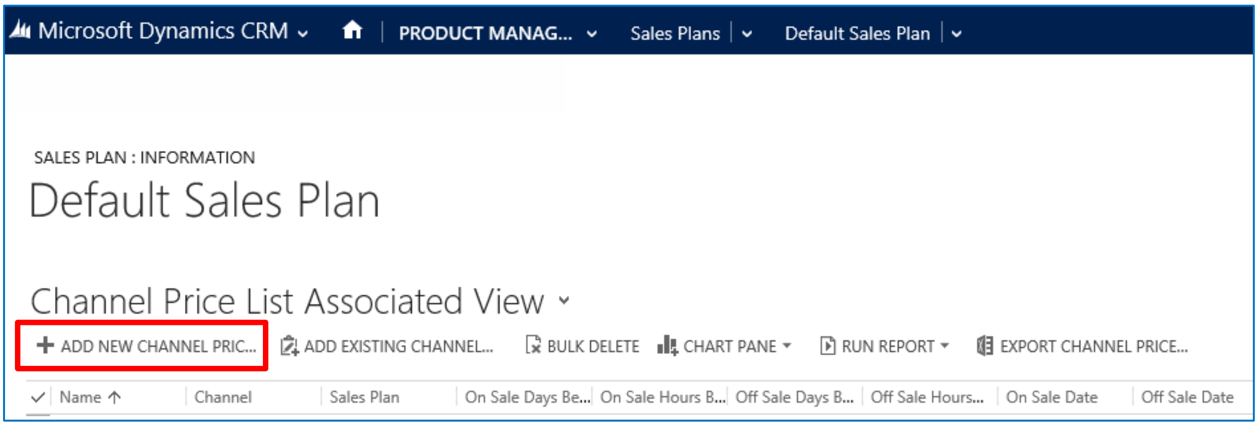
b) Next, in the Product Management area of CRM, select the **Product Management** tab before scrolling across the drop down list of the navigation bar and selecting **Sales Plans.**

c) A list of Active Sales Plans will be displayed, select the Sales Plan which the Channel Price List is to be added too. Remember to select a Fixture type Sales Plan if setting up a Chanel Price List for a Fixture, a Series type Sales Plan if setting up a Channel price List for a Series or the Other type Sales plan for a Channel Price List for any other type of product.

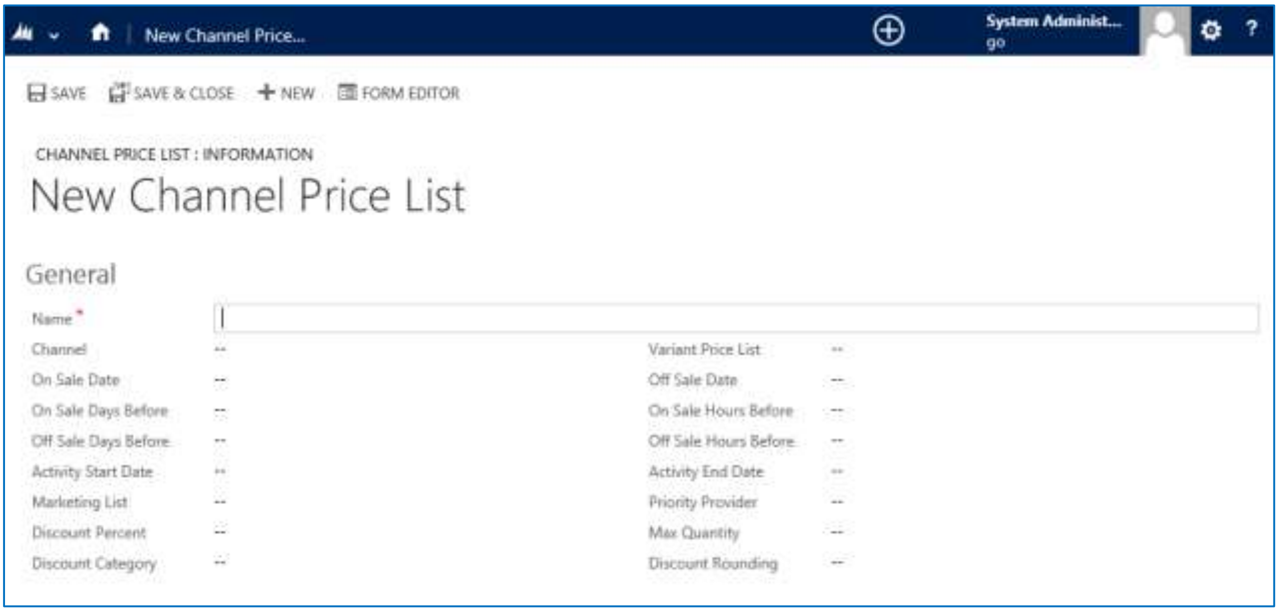
d) With the Sales Plan form open select the small arrow situated next to the name of the Sales Plan in the Navigation bar before choosing **Channel Price List** from the drop down.



e) A list of any currently associated Channel Price Lists to that Sale Plan will be displayed, select **Add New Channel Price** List in the ribbon.



f) A blank Channel Price List form will be displayed. Complete the following depending on the product type you are setting the Channel Price List up for:



- **Name.** *Applies to **all** product types.*

  Enter a name for the Channel Price List. The name can be anything, but should be meaningful. We recommended including the Channel and Product which the Channel Price List relates to within the name. E.g. POS - Standard Pricing – Fixture

- **Channel.** *Applies to **all** product types.*

  Use the Look up to select the Channel that the Price List applies to. A new Channel Price List must be set up for each Channel you would like to sell the product on. E.g. POS and Web.

- **On Sale Date.** *Applies to **Stock** and **Pass** type products only including **Memberships.***

  Enter a date when the Channel Price List should start and the product appears on sale. This field should not be used for Fixture or Series product sales, instead the On Sale Days Before and On Sale Hours Before fields should be used.

- **On Sale Days Before.** *Applies to **Fixture** and **Series** type products only.*

  Enter the number of days before the Fixture or Series start date when the Channel Price List should start. For example if 30 is entered, the Fixture or Series will come on sale 30 days before the start date. This field should not be used for Stock product sales, instead the On

Sale Date field should be used. For an example see [Using Sales Plans and Channel Price Lists to set up a Series and Fixtures].

- **Off Sale Days Before.** *Applies to **Fixture** and **Series** type products only.*

  Enter the number of days before the end of the Fixture or Series when the Channel Price List stops being used. For example if all fixture products are to be removed from sale on the Web a day before the Fixture enter 1. The value can also be a negative number e.g. -1 to allow for ticket reconciliation on the POS channels after the fixture has passed. This field should not be used for Stock product sales, instead the Off Sale Date field should be used. For an example see Using Sales Plans and Channel Price Lists to set up a Series and Fixtures.

- **Activity Start Date.** *Applies to **Scheduled** and **Auto-Scheduled** type products only.*

  Enter the Activity Start Date the price list will be used against. In this instance only activities booked after the start date will use the Price List. Using this option you can control the pricing based on when an activity is due to start, for example bring into force an alternative Price List for activities running during school holidays.

- **Marketing List.** *Applies to **all** product types if applicable.*

  If the Channel Price List is only to be used for a subset of customers (e.g. Members, Season Ticket Holders, Corporate Customers, etc.), select the Marketing List that defines the subset.

- **Discount Percent.** *Applies to **all** product types if applicable.*

  If using a discount, enter the discount that is to be applied when the Channel Price List is used. For example if setting up early bird season ticket pricing, rather than having two price lists in use (one for early bird pricing, one for standard pricing) you may apply a 20% discount across all prices included on the standard price list. This option can be used in conjunction with a Marketing List to offer members of a Marketing List a discount. It is also possible to enter a discount percent to a Channel Price List that does not have a Marketing List, all products sold using the Channel Price List will then be subject to the entered discount.

- **Discount Category.** *Applies to **all** product types if applicable.*

  If using a discount, use the lookup to select the product category that the discount will be applied to. If a product category is not entered, the discount percent will be applied to all products.

- **Variant Price List.** *Applies to **all** product types.*

  Use the Look Up to search and find the appropriate Variant Price List that is to be used when selling this product. If more than one Variant Price List is to be used for a product this will have to be represented by adding the various Price Lists to other Channel Price List forms.

- **Sequence.** *Applies to **all** product types.*

  Enter a Sequence number if required. In the case of conflicts between Channel Price Lists the sequence number will be used to determine which Price List to use.

- **Off Sale Date.** *Applies to **Scheduled** and **Auto-Scheduled** type products only.*

  Enter a date when the Channel Price List stops being used and the product will go off sale. This field should not be used for fixture or series product sales, instead the Off Sale Days Before and Off Sale Hours Before fields should be.

- **On Sale Hours Before.** *Applies to **Fixture** and **Series** type products only.*

  Enter the number of hours before the start of the Fixture or Series when the Channel Price List starts. So for example all of the prices of fixture products could increase 3 hours before kick-off. This field can be used instead of the On Sale Days Before field. This field should not be used for stock product sales, instead the Off Sale Date field should be used. For an example see Using Sales Plans and Channel Price Lists to set up a Series and Fixtures.

- **Off Sale Hours Before.** *Applies to **Fixture** and **Series** type products only.*

  Enter the number of hours before the end of a Fixture or Series when the Channel Price List stops being used. So for example each fixture product will go off sale 3 hours before kick-off. This field can be used instead of the On Sale Days Before field. This field should not be used for stock product sales, instead the Off Sale Date field should be used. For an example see Using Sales Plans and Channel Price Lists to set up a Series and Fixtures.

- **Activity End Date.** *Applies to **Scheduled** and **Auto-Scheduled** type products only.*

  Enter the Activity End Date the price list will be used against. For example only activities booked before the end date will use the price list. In this example it is not the time of booking that is important, but instead the time when the activity occurs.

- **Max Quantity.** *Applies to **all** product types if applicable.*

  Enter the maximum number of products the customer can make when the Channel Price List is in use.

- **Discount Rounding.** *Applies to **all** product types if applicable.*

  Enter the Discount Rounding i.e. to the nearest penny, 10p, or pound. If a value is not entered the system will default the rounding to a penny.

CHANNEL PRICE LIST FIELDS TO BE USED PER BOOKABLE PRODUCT TYPE

As is highlighted above, different fields must be completed in the Channel Price List so that a product can be placed on sale. The table below gives a broad overview of the fields per Bookable Product type that should be used in the Channel Price List. Please note that the fields not included in the below table can be used for all product types, if applicable.

	Fixture type products	**Series** type products	**Stock** type products (Including Memberships**)**	**Pass** type products	**Scheduled** type products	**Auto Scheduled** type products
Name	YES	YES	YES	YES	YES	YES
Channel	YES	YES	YES	YES	YES	YES
On Sale Date	NO	NO	YES	YES	NO	NO
On Sale Days Before	YES	YES	NO	NO	NO	NO
Off Sale Days Before	YES	YES	NO	NO	NO	NO
Activity Start Date	NO	NO	NO	NO	YES	YES
Variant Price List	YES	YES	YES	YES	YES	YES
Off Sale Date	NO	NO	YES	YES	NO	NO
On Sale Hours Before	YES	YES	NO	NO	NO	NO
Off Sale Hours Before	YES	YES	NO	NO	NO	NO
Activity End Date	NO	NO	NO	NO	YES	YES

EXAMPLE OF CHANNEL PRICE LISTS RECORDS CREATED

The example below continues from the Variant Price List and Sales Plans examples that were previously created for this document. It shows the Sales Plan types that each Channel Price List is linked to, whilst also highlighting how a new Channel Price List must be created for each Variant Price List and Channel combination. Again the tables are split into Leisure and Sport examples, and carry on from the two tables from the Variant Price List examples.

Leisure

Sales Plan Type	Channel Price List Name	Variant Price List	Channel	Other fields completed
Fixture type Sales Plan	Web – Standard Pricing – Fixtures (Events)	Events - Web	Web	On Sale Days Before Off Sale Days Before
Fixture type Sales Plan	POS – Standard Pricing – Fixtures (Events)	Events – POS	POS	On Sale Days Before Off Sale Days Before
Default Sales Plan – type other	Web – Retail	Retail	Web	On Sale Date Off Sale Date

Default Sales Plan – type other	POS - Retail	Retail	POS	On Sale Date Off Sale Date
Default Sales Plan – type other	Web – Standard Admission	Admission - Web	Web	On Sale Date Off Sale Date
Default Sales Plan – type other	POS – Standard Admission	Admission - POS	POS	On Sale Date Off Sale Date
Default Sales Plan – type other	POS – F&B	F&B	POS	On Sale Date Off Sale Date
Default Sales Plan – type other	Web – Memberships	Memberships - Web	Web	On Sale Date Off Sale Date
Default Sales Plan – type other	POS – Memberships	Memberships - POS	POS	On Sale Date Off Sale Date
Default Sales Plan – type other	Web – Activity	Activity	Web	Activity Start Date Activity End Date
Default Sales Plan – type other	POS – Activity	Activity	POS	Activity Start Date Activity End Date

Sport

Sales Plan Type	Channel Price List Name	Variant Price List	Channel	Other fields completed
Fixture type Sales Plan	Web – Cup Fixture	Cup Fixtures	Web	On Sale Days Before Off Sale Days Before
Fixture type Sales Plan	POS – Cup Fixtures	Cup Fixtures	POS	On Sale Days Before Off Sale Days Before
Fixture type Sales Plan	Web – Match Day Prices	Match Day Prices	Web	On Sale Days Before Off Sale Days Before
Fixture type Sales Plan	POS – Match Day Prices	Match Day Prices	POS	On Sale Days Before Off Sale Days Before
Fixture type Sales Plan	Web – Standard match price	Standard Prices - Web	Web	On Sale Days Before Off Sale Days Before
Fixture type Sales Plan	POS – Standard match price	Standard Prices - POS	POS	On Sale Days Before Off Sale Days Before
Series type Sales Plan	Web – ST Early Bird Pricing	Season Ticket – Early Bird Price - Web	Web	On Sale Days Before Off Sale Days Before
Series type Sales Plan	POS – ST Early Bird Pricing	Season Ticket – Early Bird Price - POS	POS	On Sale Days Before Off Sale Days Before

Series type Sales Plan	Web – ST Standard Pricing	Season Ticket – Standard Prices - Web	Web	On Sale Days Before Off Sale Days Before
Series type Sales Plan	POS – ST Standard Pricing	Season Ticket – Standard Prices - POS	POS	On Sale Days Before Off Sale Days Before
Series type Sales Plan	WEB – ST Renewal Pricing	Season Ticket – Renewal Prices - Web	Web	On Sale Days Before Off Sale Days Before
Series type Sales Plan	POS – ST Renewal Pricing	Season Ticket Renewal Prices - POS	POS	On Sale Days Before Off Sale Days Before
Fixture type Sales Plan	POS – Away v's Green 4 FC	Away v's Green 4 FC	POS	On Sale Days Before Off Sale Days Before
Default Sales Plan – type other	Web – Stock	Stock	Web	On Sale Date Off Sale Date
Default Sales Plan – type other	POS - Stock	Stock	POS	On Sale Date Off Sale Date
Default Sales Plan – type other	WEB - Retail	Retail	Web	On Sale Date Off Sale Date
Default Sales Plan – type other	POS - Retail	Retail	POS	On Sale Date Off Sale Date
Default Sales Plan – type other	POS - F&B	F&B	POS	On Sale Date Off Sale Date

2. PRODUCT CONFIGURATION

The Product Configuration section of this document gives instruction how to configure the variety of products types that are available. All of these products will require Variant Types, Variant Price List, Sales Plans and Channel price Lists to have been created. Instructions on how to do this can be found in the Setup section of this document. The Channels the products are to be sold upon should also already have been created. The following diagram shows the products which can be set up and placed on sale:

1. FIXTURES

2. SERIES

3. STOCK

4. AUTO SCHEDULED

5. SCHEDULED

6. MEMBERSHIPS

7. PASSES

2.1. PLACING A NEW FIXTURE ON SALE

Fixtures are not only used to place an individual sports game on sale, for example Green 4 FC vs 4Sight FC, but are also used when placing an event such as a music concert or other performance on sale, such as a Take That or Elton John concert.

Before a Fixture can be placed on Sale the following Setup and infrastructure must have been completed:

- The Channels that the product is to be sold upon should have been created. *(See the Go CRM 2015 Infrastructure User Guide for information on Channels).*
- The Venue, Venue Configuration and Bookable Resources that are to be used for the fixture. *(See the Go CRM Venue Management User Guide for more information on these).*
- Variant Types for the fixture ticket must have been created. e.g. Adult, Junior and Senior.
- Variant Price Lists to enter differing pricing regimes for a fixture must have been created.
- Fixture Type Sales Plan to link the Channel Price List must also have been set up.
- Channel Price Lists to control when the fixture is shown for Sale in addition to any pricing regimes which may come into force.

Examples of using Sales Plans and Channel Price Lists to set up Fixture/Series pricing regimes can be found in the Examples: Using Sales Plans and Channel Price Lists to set up a Series and Fixture section of this document.

There are a number of processes that must occur when placing a Fixture on Sale. The Fixture itself must be created before it can be added to an Active Series (a Series represents a group of fixtures). It must be remembered that even if selling a Fixture individually, it must still be connected to a Series. Upon completing these tasks a Bookable Product, where additional details such as the Channels the Fixture is to be sold upon, the pricing of it and Bookable Resource related to it, are also added.

However it must be noted that a new Series and Bookable Product do not need creating for every Fixture which you place on Sale. The instructions below demonstrate how to place a Fixture on Sale for the very first time.

Please note that if looking to set up an Away Fixture on the system, this is done differently to setting up a 'Home' Fixture. For information on Away Fixtures, see the Placing Away Fixtures on Sale section of this document.

Additional functionality can be added once a Fixture has been created, information on this functionality can be found in the following sections:

- Upselling Products (Additional Products)
- Entitlements
- Season Ticket Buybacks
- Adding a Fixture to a Season Ticket Card
- Reservations

The flow below shows the process of placing a Fixture on sale.

CREATE THE FIXTURES → ADD THE FIXTURES TO A NEW OR EXISTING SERIES → CREATE A FIXTURE TYPE BOOKABLE PRODUCT (if applicable)

STEP 1: CREATE THE FIXTURES

CREATE THE FIXTURES → ADD THE FIXTURES TO A NEW OR EXISTING SERIES → CREATE A FIXTURE TYPE BOOKABLE PRODUCT (if applicable)

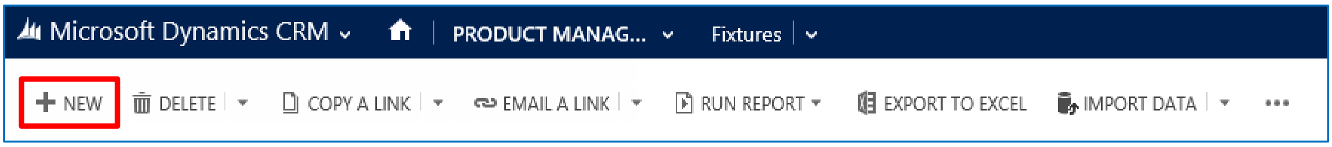
The Fixtures entity is used to add the details of individual fixtures that are to be made available for sale, for example the Name, Date and Venue of the Fixture as well as any Access Control information if applicable. The appropriate Fixture type Sales Plan is also added to the Fixture form.

To create a new fixture 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**.

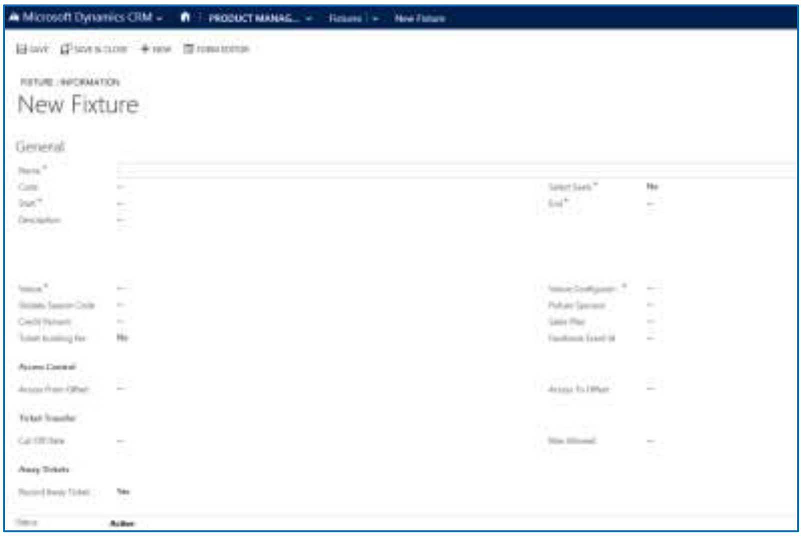
b) Next, in the Product Management area of CRM, select the **Product Management** tab before scrolling across the drop down list of the navigation bar and selecting **Fixtures.**

c) A list of any currently Active Fixtures will be displayed, select **New** in the ribbon.



d) A blank fixture form will be displayed, complete the following details:

Note. All other fields in the Fixture form that have not been described below do not need to be completed/changed.



- **Name.** Enter the Name of the Fixture, for example Green 4 FC vs 4Sight FC 14/15 or for a concert/event enter its name e.g. Take That concert. The name will be visible and therefore should reflect the event accurately. It is recommended that you add the season date to the fixture name to distinguish between Fixtures in different series.
- **Code.** If applicable this is utilised for access control set up.
- **Start.** Enter the start date and time of the Fixture. The start time will be used in conjunction with the Channel Price List to control the pricing.
- **Description.** Enter a description of the Fixture. The description will be visible to users and therefore should reflect the event accurately.
- **Venue.** Use the lookup to select the Venue where the Fixture is to take place. The Venue should have been set up previously as part of the systems venue configuration. For more information, see the Go CRM 2015 Venue Management User Guide.
- **Skidata Season Code.** If applicable this field is used to enter access control information.
- **Credit Percent.** Used when a customer elects to upgrade or move a Fixture ticket linked to the Series. The credit percent represents the value of the customer's season ticket against the value of the Fixture product they are upgrading/moving to. This field can be left blank if upgrades and moves are not available on your system.
- **Select Seats.** Select **Yes** if the customer is to be allowed to select their own seats when using the Go's web ticketing site.
- **End.** Enter the end date and time of the fixture. This time will be used in conjunction with the Channel Price List to control pricing.
- **Venue Configuration.** Use the lookup to select the Venue Configuration that is to be used for this Fixture. The Venue Configuration should have been set up previously as part of your venue configuration. For more information, see the Go CRM 2015 Venue Management User Guide.
- **Fixture Sponsor.** If applicable, enter the name of the sponsor for the Fixture. The Fixture Sponsor can be included on the ticket if the appropriate information is added to the print transform.
- **Sales Plan.** Use the Look Up to select an appropriate **Fixtures type** Sales Plan. The Sales Plan Type chosen here should be a **Fixture Sales Plan**. For more information on Sales Plans see section 1.3. Sales Plans.
- **Display Group.** If Fixtures are to be grouped together on the POS enter the name of the group here. For example a group called Friendlies could be entered into the Display Group field for all friendly fixtures to be grouped together. If a display group has been entered for some Fixtures whilst others do not have a Display Group, all fixtures that are not part of a Display Group will be shown in a group on the POS called "No 'Display Group' has been set for these fixtures."
- **Record Away Ticket Details.** Select **No**, this is used when setting up away tickets.

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

h) Repeat the above process for each new fixture that you wish to create.

Example of Fixture Records created

Two Fixtures have been created as examples for this document representing both Leisure and Sporting events. The table shows the mandatory fields that have been completed in each fixture form:

Record Type	Name	Start and End Date/Time	Select Seats	Venue	Venue Configuration	Sales Plan
Fixture	Ed Sheeran in concert	Start: 23/05/2015 17:00 End: 23/05/2015 22:00	Yes	Dragon Bay Arena	Concert Arena Layout	Events (Fixture) Sales Plan
Fixture	Green 4 FC vs 4Sight FC 14/15	Start: 05/09/2015 15:00 End: 05/09/2015 17:00	Yes	Green 4 Sports Stadium	Standard Green 4 Sports Stadium Layout	Home Friendly Fixtures 15/16

STEP 2: CREATE A SERIES AND ADD THE FIXTURES

The Series entity is used to represent a group of Fixtures, for example a Season, Half Season or multi music concert ticket. Even if selling individual Fixture tickets that are not to be sold as part of a Series they must still be linked to a Series and therefore one must be created. A Fixture can be included in more than one Series, for example a sports team's Fixture may be included in the club's full season Series and half season Series.

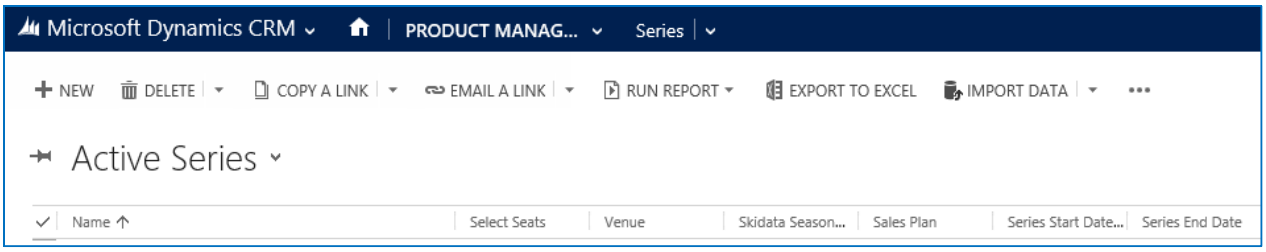
A Fixture can also be added to a Series at any time. This means that if a Series already exists, for example representing a group of Cup games, a Fixture can be added to it upon progression in the cup. Hence it is not necessary to always create a new Series, Fixtures can be added to existing ones if applicable. The example below demonstrates how to create a new Series from the start before adding the Fixtures. To just add Fixtures to an existing Series skip to Add the Fixtures to the Series.

To create a Series record:

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**.

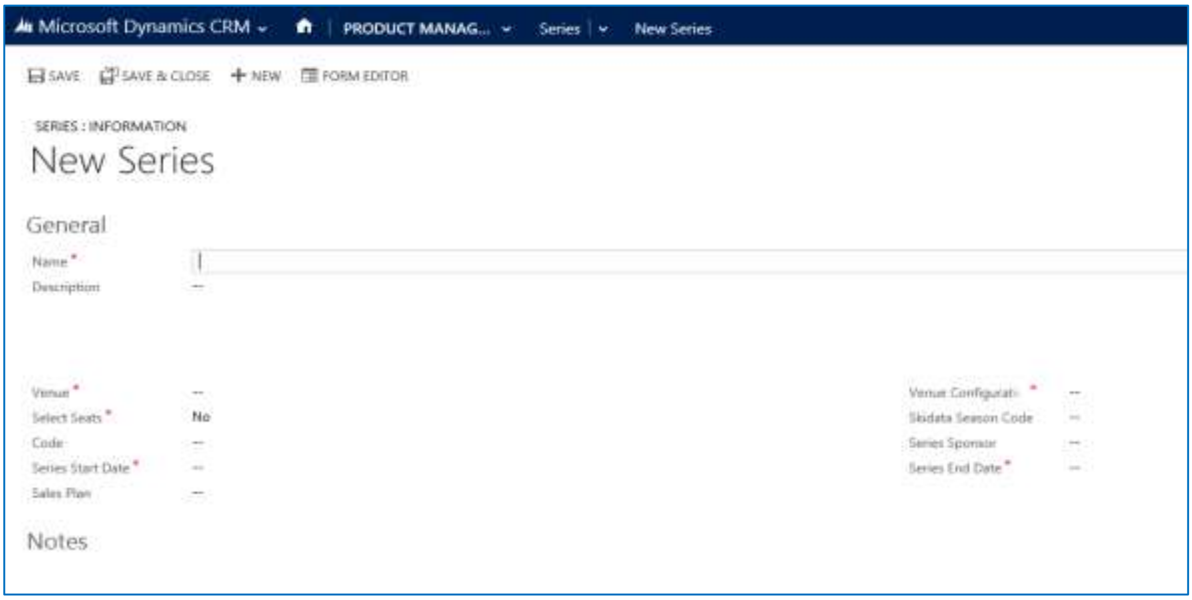
b) Next, in the Product Management area of CRM, select the **Product Management** tab before scrolling across the drop down list of the navigation bar and selecting **Series.**

c) A list of currently active Series will be displayed, if a relevant Series does not already exist, select **New** on the ribbon or alternatively open up an existing Series.



d) The Series form will be displayed, complete or ensure that the following fields have been completed:

Note. All other fields in the Series form that have not been described below do not need to be completed/changed.



- **Name.** Enter a name for the series. For example Home Fixtures 15/16. The series name will be visible on your sales Channels and potentially the tickets you print from the system.
- **Description.** Enter a description of the series. The series description will be visible on your sales Channels.
- **Venue.** Use the lookup to select the Venue used for the series. The Venue should have been set up previously as part of your venue configuration. The Venue should be the same Venue as selected for the Fixture.

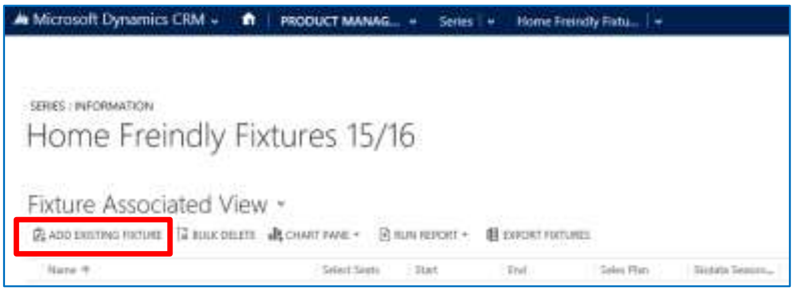
- **Select Seats.** Select **Yes** if the purchaser is to allowed to select their own seats when using the Internet sales site.
- **Series Start Date.** Enter the start date of the Series. Any Fixture added to the Series must take place between the Start and End date of the Series it is added to.
- **Venue Configuration.** Use the lookup to select the Venue Configuration used for the Series. The venue configuration should have been set up previously as part of your venue configuration. The Venue Configuration should be the same Venue Configuration as selected for the Fixture.
- **Skidata Season Code.** Used for access control.
- **Series Sponsor.** Enter the name of the sponsor for the series. The sponsor can be printed onto your tickets if required.
- **Series End Date.** Enter the end date of the Series. Any Fixture added to the Series must take place between the Start and End date of the Series it is added too.

e) Once the details are complete select **Save** on the ribbon, the Fixtures created in Step 3 must now be added to the Series.

Adding the Fixtures to the Series

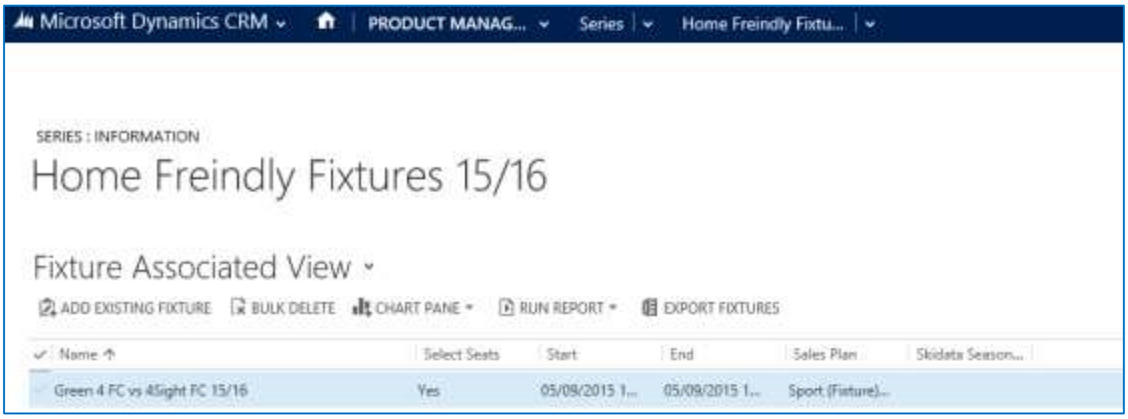
a) With the Series open in the form view, select the small arrow next to the name of the Series in the Navigation area. From the drop down list scroll across and choose **Fixtures.**

b) Any Fixtures that are currently linked to the Series will be displayed. Select **Add Existing Fixture** in the ribbon.



c) A drop down will appear where it is either possible to type and search for the appropriate Fixtures, or alternatively use the magnifying glass at the end of the drop down to Look Up the Fixture.

d) Upon finding the Fixture, select it. The Fixture will appear in the Fixture Associated View and will now be linked to the Series. Repeat the above process for each Fixture that is to be added to the Series.



e) Select Save in the bottom right hand corner of the Series form, it is now possible to navigate away.

Example of Series Records created

Two Series have been created as examples for this document representing both Leisure and Sporting events. The table shows the mandatory fields that have been completed in each Series form:

Record Type	Name	Venue	Venue Configuration	Select Seats	Series Start and End Date	Fixture Linked to Series
Series	Summer Music Concerts	Dragon Bay Arena	Concert Arena Layout	Yes	Start: 01/11/2014 End: 01/10/2015	Ed Sheeran in concert
Series	Home Friendly Fixtures 15/16	Green 4 Sports Stadium	Standard Green 4 Sports Stadium Layout	Yes	Start: 17/03/2015 End: 21/07/2016	Green 4 FC vs 4Sight FC

STEP 3: CREATE THE FIXTURE BOOKABLE PRODUCT

CREATE THE FIXTURES → ADD THE FIXTURES TO A NEW OR EXISTING SERIES → CREATE A FIXTURE TYPE BOOKABLE PRODUCT (if applicable)

The Bookable Product entity is used to represent products that are sold, for example the actual match or concert ticket. A Fixture type Bookable Product must be created for Fixtures to be sold and the Bookable Product is where the Channels the Fixture is to be sold upon, the pricing of the fixture and the Bookable Resource related to it are all added.

A Bookable Product must exist for each Bookable Resource related to the Fixture, for example a Standard ticket type, a hospitality ticket type or restricted view ticket type.

It must be noted that a new Bookable Product does not need to be created for each Fixture created, previous Bookable Products can be reused.

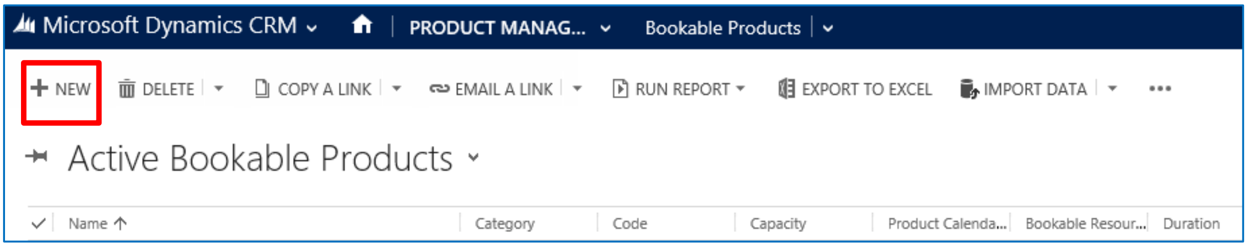
The below example demonstrates how to create a new Fixture type Bookable Product from the beginning.

To create a new Fixture type Bookable Product:

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**.

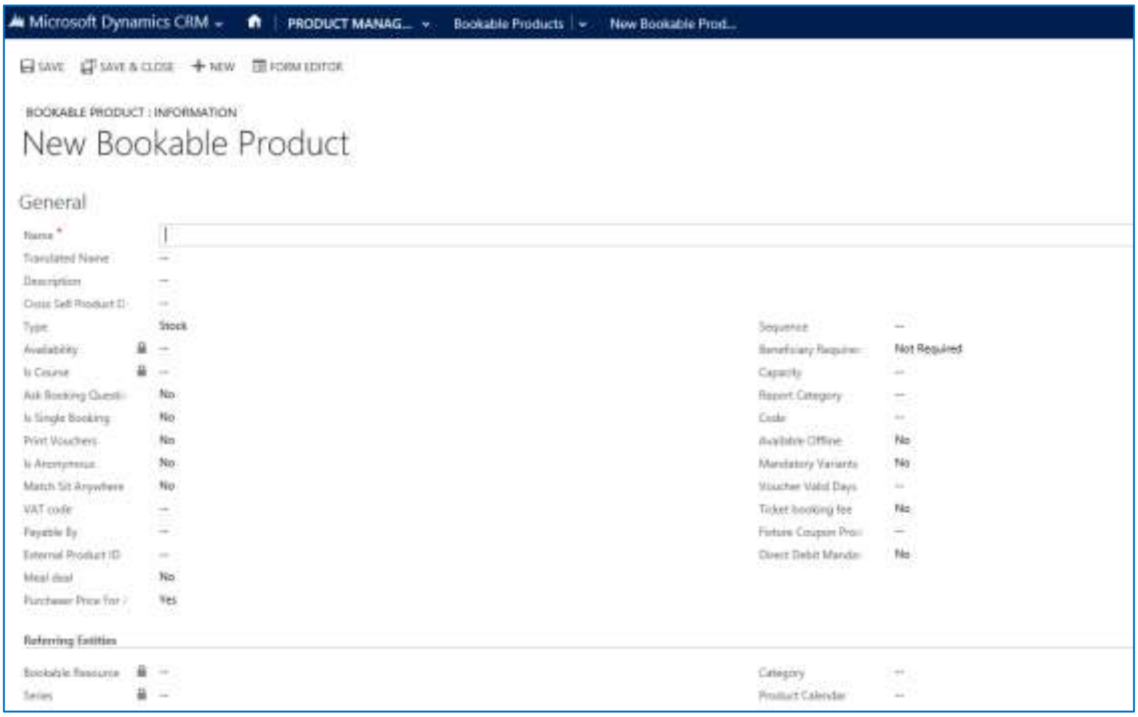
b) Next, in the Product Management area of CRM, select the **Product Management** tab before selecting **Bookable Products** from the drop down.

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 the Bookable Product form that have not been described below do not need to be completed/changed.



General:

- **Name.** Enter a name for the product. The name will be visible to customers, and should therefore reflect the nature of the product, for example Friendly Fixtures 15/16 - Standard or Summer Concerts - Standard.
- **Translated Name.** Used for translated implementations. For more information see the Set up for Multi Lingual using the Translation Field.
- **Description.** Enter a description of the product. The Description field can be set as a translatable string if desired (if used in the Web UI). See the Set up for Multi Lingual using the Translation and Description Field for further information.
- **Type.** Use the drop-down list to select the **Type.** This example is a **Fixture**.
- **Is Anonymous.** Select **Yes** if the purchaser is not required to provide a name when buying the product. The channel must also be set to allow the sale of anonymous products.
- **Payable By.** If the product can be paid using direct debit select the direct debit payment method. If the product is not to be paid via Direct Debit, leave this field blank.
- **VAT Code.** If applicable, use the lookup to select the correct tax code for the Bookable Products form.

- **External Product ID.** If applicable this field can be used to link the Bookable Product to an external list of products.
- **Sequence.** If applicable, enter a sequence number for the product. The sequence number is used to determine the order in which products are displayed in the POS and Web channels first.
- **Beneficiary Requirement.** Use the drop-down list to select if a customer's name is required when the product is purchased, for example the details of the ticket purchaser. Select from the following options:
    i. **Not Required.** The customer will not be asked for their name and contact details.
    ii. **Requested.** The customer will be asked for their name and contact details, but can skip this option if they do not wish to provide their details.
    iii. **Required.** The customer must provide their name and contact details. This option should be selected when setting up a season ticket or membership product.
- **Report Category.** This field can be used for reporting purposes to categorise the products sold through Go's Ticketing system.
- **Code.** Utilised for Access Control set up.
- **Available Offline.** Select **Yes** if the Bookable Product is to be available for purchase through the offline POS. This option cannot be used for products that require a capacity to be monitored in case they are oversold.
- **Fixture Coupon Product.** If using a coupon, enter the **Fixture Coupon** which is to be used.

Referring Entities:

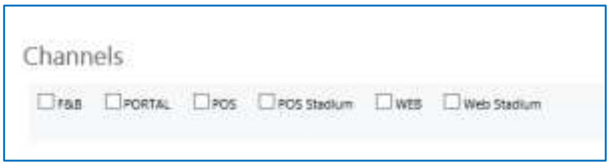
- **Bookable Resource.** The Bookable Resource selected will determine which seats are available to the customer to purchase (for example, Standard, Hospitality, Unseated or Restricted View). Select the Look Up icon alongside the field and find the appropriate Bookable Resource. For each Bookable Resource that is available for this type of ticket, a new Bookable Product form will need to be created. For more information on how to create a Bookable Resource, see the Go CRM 2015 Venue Management User Guide.
- **Series.** Use the Look Up to select the relevant Series that was previously created in Step 2. This will be the Series that the Fixtures for this product were previously added too.
- **Category.** Use the Look Up dialog to select the product Category. The Category is used to group products, for example into tickets, food, etc. The categories are used by the price list and channel editors.

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

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

   i. Scroll down to the **Channels** section of the Bookable Product form

   ii. The Channels which have been set up during the configuration on your system will be listed. Select the checkbox alongside each Channel which the product will be sold.

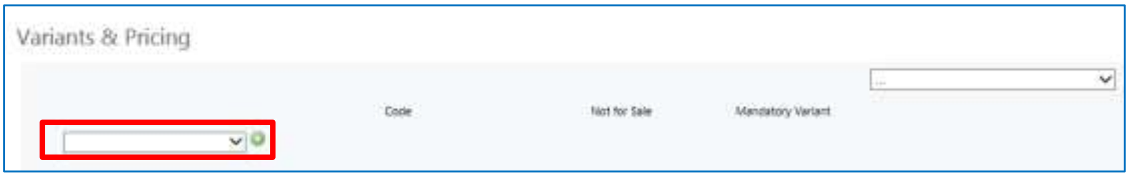


   iii. Select **Save** on the ribbon.

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

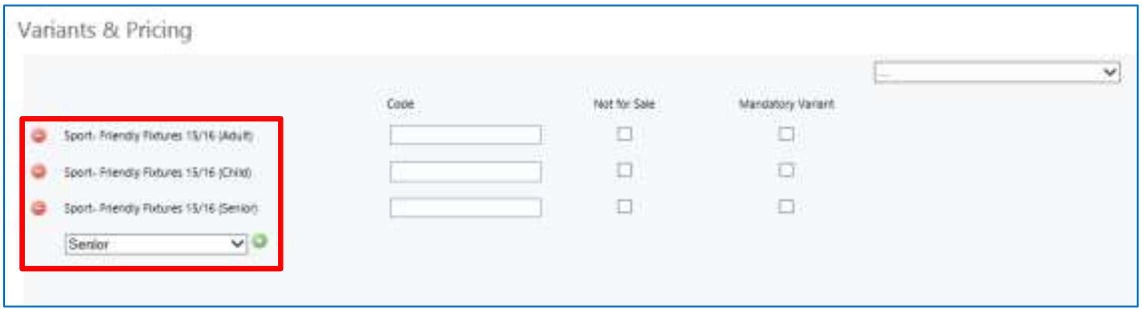
   i. Scroll down to the **Variants & Pricing** section of the Bookable Product form.

   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.



   iii. Select the green cross alongside the Variant name to add a new Variant.

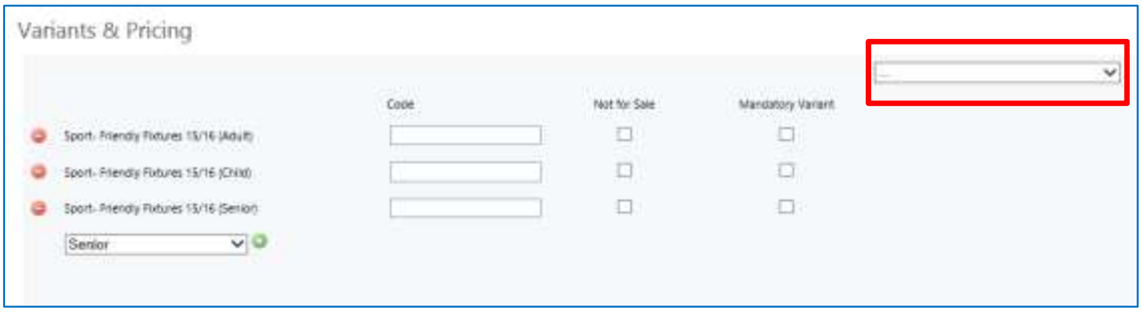
   iv. Repeat until all variants are listed. If you need to remove a variant, click the red minus sign alongside the variant.



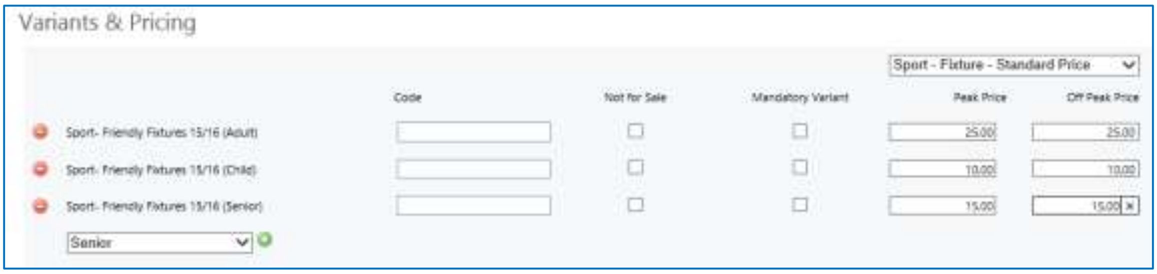
Note. Once a variant is sold it can then not be removed from the Variant and Pricing list. Therefore ensure the correct variants are set up for your product before you begin to sell them.

h) Next, the price of the product 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).



ii. Peak Price and Off Peak Price fields will appear upon 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.



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

i) Once 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 products should appear for sale in the selected Channels.

Example of Fixture type Bookable Products Created

Two Fixture type Bookable Products have been created as examples for this document representing both Leisure and Sporting events. The table shows the mandatory fields that have been completed in each Bookable Product form. Please note that a new Bookable Product form would need creating for each Bookable Resource that is related to the product.

Record Type	Name	Type	Bookable Resource	Series	Category	Channels	Variants	Variants Price List
Bookable Product	Summer Concerts- Standard	Fixture	Dragon Bay Arena- Standard	Summer Music Concerts	Concert	POS Web	Adult Senior Students Child	Dragon Bay- Events
Bookable Product	Friendly Fixtures 15/16- Standard	Fixture	Green 4 Stadium- Standard	Yes	Friendly Fixtures	POS Web	Adult Child Senior	Fixture- Standard Price

FIXTURE TICKET ON SALE CHECK LIST

The following checklist can be used to ensure that you have completed all of the tasks required to place a Fixture on sale:

Task	Completed?	Comments
Created the Variant Types		E.g. Adult, Junior or Senior
Created Fixture type Sales Plan		Ensure the type of Sales Plan created here is Fixture.
Created the Channel Price Lists that are linked to the Fixture type Sales Plan		The Channel Price List should link the Channels to the Variant Price List. Ensure the On and Off Sale days/hours have been entered.
Created the Fixtures		Ensure the Fixture Start and End date and time are correct. Ensure that a Venue and Venue Configuration have been entered. Add the Fixture type Sales Plan. Repeat the steps for each Fixture that needs creating.
Created a Series and added the Fixtures		Ensure that a Venue and Venue Configuration have been entered. Add the Series start and end date. Add the Fixtures that have been created to the Series.
Created the Fixture type Bookable Product		Ensure the Bookable Product Type is Fixture. A Bookable Product must be linked to a Bookable Resource. Ensure the Series that has the chosen fixtures linked to it is added into the Bookable Product Ensure a Category has been added to the Bookable Product
Assigned channels to the Bookable product		Ensure the relevant Channel check boxes are ticked.
Assigned variants to the Bookable product		Ensure the variants have been added.
Assigned prices to the Bookable product		Prices should be added to an active Variant Price List.

PLACING AWAY FIXTURES ON SALE

To place an Away Fixture or Travel product on sale it is possible to use near to the standard process for placing a Fixture on sale as discussed previously in Placing a new Fixture on sale. However there are a number of fields that need to be selected that differ to this standard process. An example of Away Fixture Pricing can be found after these instructions.

Before placing an Away Fixture on Sale an Away Venue must have been created, information on setting up an Away Venue can be found in the Go CRM 2015 Venue Management User Guide. Setting up an Away Venue means that the following configuration would have been completed:

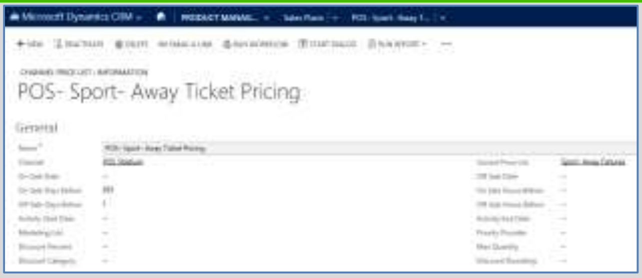
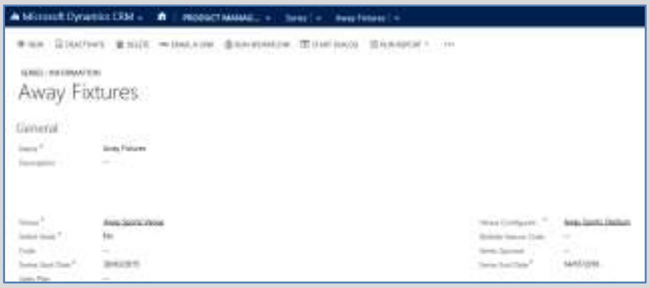
- **An Away Bookable Resource.** A new Away Bookable Resource needs creating for each Away Fixture that is to be sold.
- **An Away Venue.** Only needs creating once in the system and can be reused for all away Fixtures.
- **A Block to represent the Away Capacity**. New Away Blocks must be created for each Away Fixture.
- **An Away Venue Configuration.** Only needs creating once in the system and can be reused for all away Fixtures.
- **An Away Venue Configuration Block.** A new Away Venue Configuration Block needs creating for each Away Fixture.

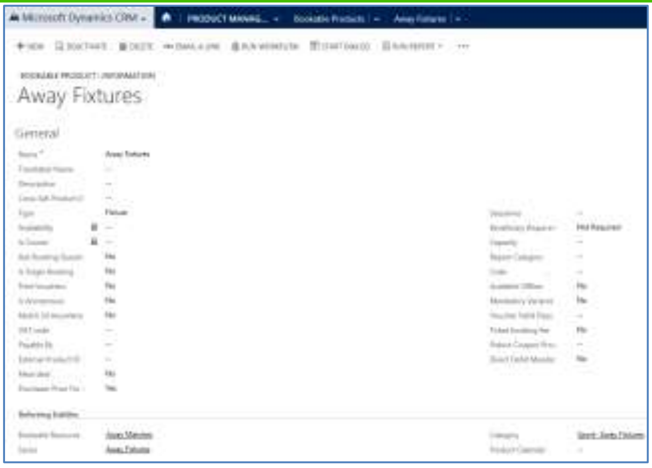
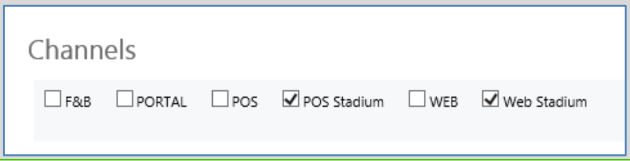
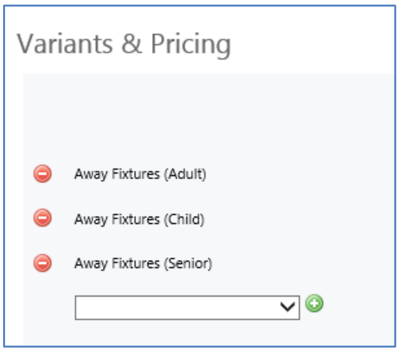
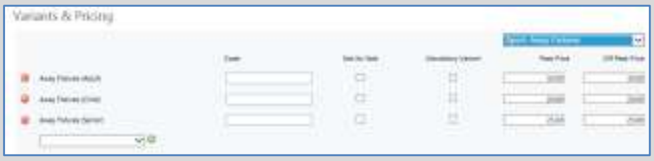
Furthermore this section assumes that the following have been set up in the CRM system before placing the Away Fixture on sale:

- **Channels** – The Channels that the product is to be sold upon should have been created and configured. (See the Go CRM 2015 Infrastructure User Guide for information on Channels). Ensure that the Show Stadium Option has been set to 'Yes' to show the options for Fixtures and Series on the POS home screen.
- **Variant Types** for the Away Fixture must have been created. e.g. Adult, Junior and Senior.
- **Variant Price Lists** to enter the pricing schedules for the away fixture must have been created. It is recommended that a new Variant Price List is created for each Away Fixture.

The table below gives a brief outline showing how to place Away Fixtures on sale whilst highlighting the fields that must be completed. Remember, different fields must be completed to place an Away Fixture on Sale, these are highlighted below:

Task	Comments
Step 1: Sales Plans 	A new fixture type Sales Plan will need to be created for each Away fixture. As pricing for Away Fixtures is governed by the host club, it will invariably be necessary to create a new Sales Plan for each away fixture
Step 2: Channel Price List	The Channel Price List is linked to your Away Sales Plan. You will need to create a channel price list from your Sales Plan for each channel – variant price list combination. A new Channel Price List will be needed for each away fixture you set up, to allow for differing away fixture on/off sale dates and ticket pricing.

Task	Comments
	
Step 3: [Series]() 	A new series must be created to hold all of the away fixtures. For example it could be named Away Fixtures 2014/15. Ensure that the following are completed: • **Venue:** Enter the Away Venue. • **Venue Configuration**: Enter the Away Venue Configuration. • **Select Seats**: Set to **No** • **Series Start and End Date:** Enter appropriate dates. Remember to add all Away Fixtures to this Series.
Step 4: [Fixture]() 	For each away fixture, create a fixture record. The fixture should be linked to the Series created in the previous step Please Note. Unlike a standard home fixture the following fields must be completed for an Away fixture: • **Record Away Ticket Details.** Select **Yes.** • **Venue Configuration.** Select the Away Venue Configuration. • **Sales Plan**. Use the Look Up to select the Fixture type Sales Plan created for Away Fixtures previously.
Step 5: [Bookable Product]()	Create a fixture type Bookable Product to represent the tickets on sale for Away Fixtures. A new Bookable Product will need creating for each Away Fixture that is to go on sale. Ensure the following are completed: • **Type:** Select Fixtures. • **Bookable Resource:** Set to the appropriate Away Bookable Resource created previously.

Task	Comments
	• **Series:** Set to the Away Series previously created. • Make sure that that **Beneficiary Requirement** set to **Required** as the away ticket information is captured against a Beneficiary in the POS.
Bookable Product – Channels 	Using the Bookable Product form, select the Channels the away product will be sold.
Bookable Product – Variants 	Using the Bookable Product form, select the Variant Types for the away product e.g. Adult, Senior, and Junior. Where possible reuse the Variants available in the system
Bookable Product – Pricing 	Using the Bookable Product form, enter the price details for the away product. It is recommended that a new Variant Price List is created for each away fixture.

CAPTURING AWAY TICKET INFORMATION IN THE POS

If there is a requirement to capture Away ticketing information i.e. Seat No.'s etc. when selling Away tickets in the POS, the following set up needs to be done in CRM:

- Set up an Away Block against the Fixture
- Define ticket details to be captured in the POS

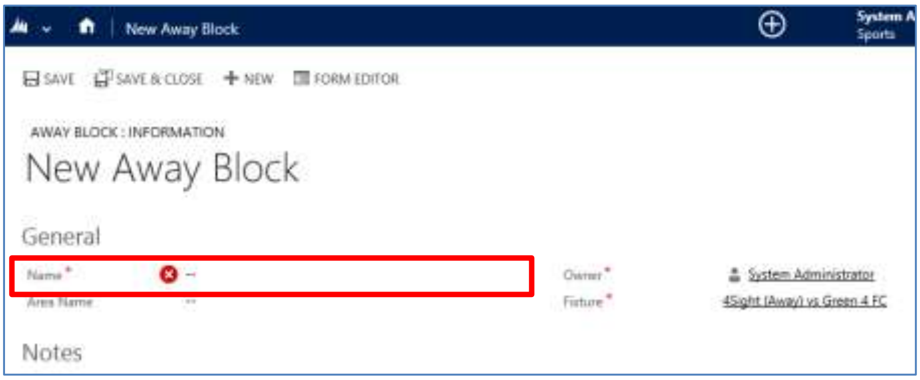
Setting up the Away Block to capture Away Ticket Information

To do this, complete the following:

a) With the Away fixture form open, select the small arrow next to the name of the Away fixture, from the drop down select **Away Blocks.**

b) The Away Block Associated View will be displayed. Select **Add New Away Block** in the ribbon.

c) Capture the Away Block **Name** for the Away Fixture.

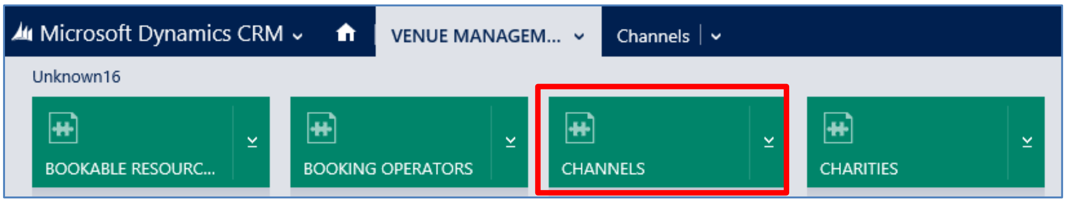


d) Select **Save and Close** in the ribbon.

Setting up the POS Channel to capture Away Ticket Information

a) Select or hover over the **Microsoft Dynamics** tab on the navigation bar and choose **Venue Management** from the drop down.

b) Select or hover over the **Venue Management** tab in the navigation bar, from the drop down, choose **Channels.**

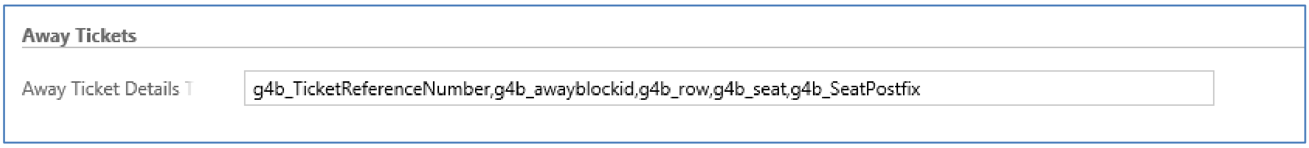


c) Select the **POS** Channel. Add the following comma (‘,’) separated list to the field **Away Ticket Details To Record** (Highlighted below):

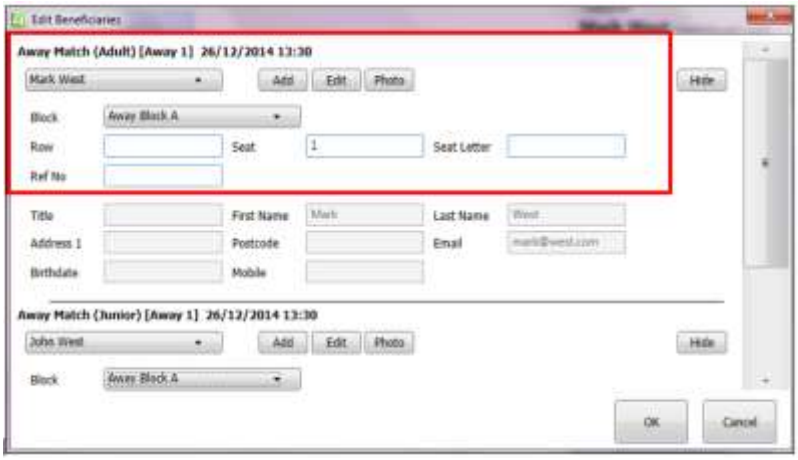
g4b_TicketReferenceNumber,g4b_awayblockid,g4b_row,g4b_seat,g4b_SeatPostfix

The above list represents the following:

- **g4b_TicketReferenceNumber** – Reference No. Field in the POS
- **g4b_awayblockid –** Block Field, note by setting up the Block as above the block name will be contained in a drop down on the POS
- **g4b_row –** Row Field in the POS
- **g4b_seat –** Seat Field in the POS
- **g4b_SeatPostfix –** Seat Letter Field in the POS



d) This will ensure the Away Block names are contained in a drop down list when selecting Beneficiaries in the POS as is highlighted below.



EXAMPLE- AWAY FIXTURE PRICING

The following example illustrates how to set up the following pricing schedule for Away Fixtures:

- The Fixture is removed from sale from all Channels 1 day before the Fixture
- Travel options are only sold via the POS channel

As pricing and products for Away Fixtures is governed by the host club, it will invariably be necessary to create a new Sales Plan for each away fixture.

Prior to creating the sales plan the following must be set up:

- **Variant Price Lists:**
- Away Fixture Pricing (Specific to each Fixture)
- Channels:
    - Web
    - POS
- **Away Series** – A current away season
- **Away Fixtures** – At least one fixture linked to the current Series
- **Bookable Product** – At least two Fixture type products with Variants and Channels set. This should be linked to the current Series. Note the product that is only available on the POS should not have the Web channel box selected.

To set up the desired pricing carry out the following:

1. Open the Away Fixture details. Click the lookup button alongside the Sales Plan field. Select **New**.
2. A blank Sales Plan form will be displayed. Complete the following details:
    a. **Name.** Enter a name for the Sales Plan. For example Away team vs Green 4 FC 14/15.
    b. **Sales Plan Type.** Select **Fixture** from the drop-down list.
3. Select **Save** on the ribbon.
4. Next create the Channel Price Lists linked to the Sales Plan. You will need to create a Channel Price List for each Channel – Variant Price List combination. Therefore in this example you will need to create the following Channel Price Lists:
    a. POS - Away Fixture Pricing
    b. Web - Away Fixture Pricing
5. For the price lists to come into force at the correct times, it is important to set the relative on/off sale dates as follows in the Channel Price List form:

Channel Price List	On Sale Days	On Sale Hours	Off Sale Days	Off Sale Hours
POS - Away Fixture Pricing	365		1	
Web - Away Fixture Pricing	21		1	

6. Once the Channel Price Lists are set up select **Save & Close** on the Channel Price List ribbon.
7. This process will need to be repeated for each Away Fixture to allow for different product sets and prices.

2.2. PLACING A NEW SERIES ON SALE

A Series is used to represent a group of Fixtures, for example a season, half season or multiday concert ticket. The Fixtures that make up the Series (e.g. all of the League Fixtures in a Season Ticket) must be added to the Series (e.g. The Series that represents the Season Ticket).

It is possible for Fixtures to be included in more than one Series. For example a sports team's Fixtures may be included in the club's full Season Ticket and half Season Ticket. The flow below shows the process of placing a Series on Sale.

Before a Series can be placed on Sale the following Setup and infrastructure must have been completed. Additionally the Fixtures that are to be a part of the Series must also have been created, to create the Fixtures see Step 1 Create the Fixtures in the previous section of this document.

- The Channels that the product is to be sold upon should have been created (See the Go CRM 2015 Infrastructure User Guide for information on Channels).
- The Venue, Venue Configuration and Bookable Resources that are to be used for the fixture (See the Go CRM Venue Management User Guide for more information on these).
- Variant Types for the Series must have been created, e.g. Adult, Junior and Senior.
- Variant Price Lists to enter differing pricing regimes for a Series must have been created.
- Series Type Sales Plan to link the Channel Price List must also have been set up.
- Channel Price Lists to control when the Series is shown for Sale as well as any differing pricing regimes which come into force.
- Fixtures - These should already have been previously created.

Examples of using Sales Plans and Channel Price Lists to set up Fixture/Series pricing regimes can be found in the Examples: Using Sales Plans and Channel Price Lists to set up a Series and Fixture section of this document.

There are a number of processes that must occur when placing a Series on Sale and the Fixtures that make up the Series must be created before they can be added to a Series. Upon completing these tasks a Series type Bookable Product where additional details such as the Channels the Series is to be sold upon, the pricing of it and Bookable Resource related to it are added.

It must be noted that a Bookable Product does not need creating for every Series that you place on Sale, Bookable Product forms can be reused. The instructions below demonstrate how to place a Series on Sale for the very first time.

Additional functionality can be added once a Series has been created, information on this functionality can be found in the following sections:

- Upselling Products (Additional Products)
- Entitlements
- Season Ticket Buybacks
- Adding a Fixture to a Season Ticket Card
- Reservations

The flow below is the process showing how to place a Fixture on sale:

STEP 1: CREATE THE SERIES

The Series entity is used to represent a group of Fixtures, for example a season, half season or multiday concert ticket. The Fixtures that make up the Series (e.g. all of the League Fixtures in a Season Ticket) must be added to the Series (e.g. The Series that represents the Season Ticket).

It is possible for Fixtures to be included in more than one Series. For example a sports team's Fixtures may be included in the club's full Season Ticket and half Season Ticket.

PLACING AN EXISTING SERIES ON SALE

Note. If Fixtures have already been placed on sale individually and they are therefore part of an existing Series as is demonstrated in Section 2.1 Placing a new Fixture on sale, then it is possible to put this existing Series on sale without having to create a new Series form.

To do this a Series type Sales Plan with a linked Channel Price List will need adding to the existing Series form.

Therefore to place an existing Series on sale which has fixtures already linked to it, ensure the following has been completed:

I. In CRM, select **Series** from the drop down of the **Product Management** tab, find and open the existing Series form.

II. Ensure that the field entitled **Sales Plan** has a **Series type Sales Plan** attached to it via the Look Up.

III. Upon adding the Series type Sales Plan, select **Save** in the bottom right hand corner.

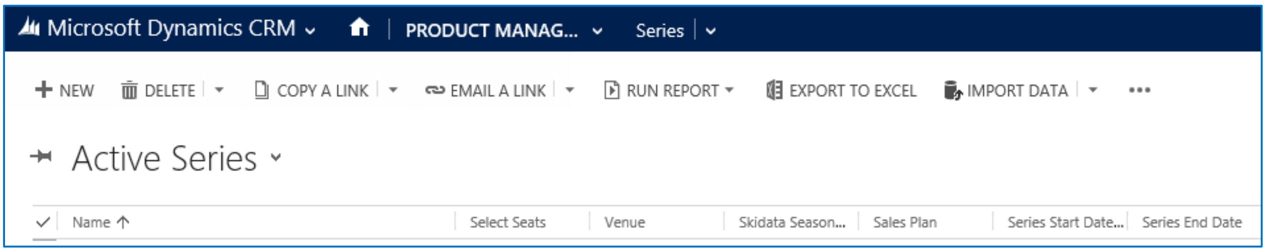
IV. A Series type Bookable Product must now be completed where the Series Pricing and Channels will be set up. Skip to Step 3 for instructions on how to complete this form.

To create a Series record:

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**.

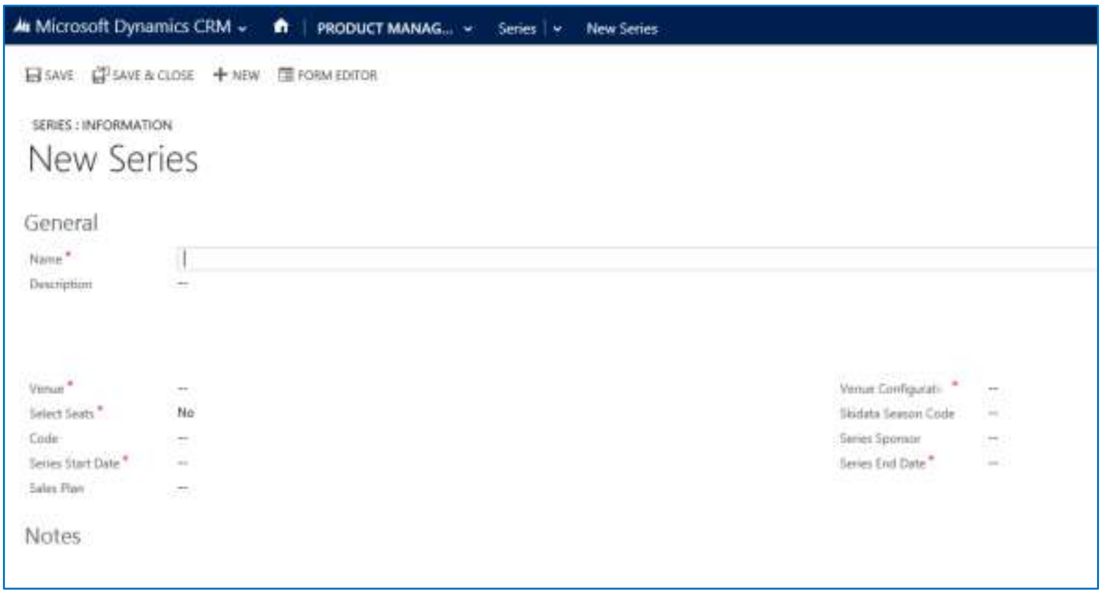
b) Next, in the Product Management area of CRM, select the **Product Management** tab before scrolling across the drop down list of the navigation bar and selecting **Series.**

c) A list of currently active Series will be displayed, if a relevant Series does not already exist, select **New** on the ribbon or alternatively open up an existing Series.



d) The Series form will be displayed, ensure that the following fields are completed:

Note. All other fields in the Series form that have not been described below do not need to be completed/changed.



- **Name.** Enter a name for the series. For example Green 4 Season Ticket 15/16. The series name will be visible on your sales Channels and potentially the tickets you print from the system.
- **Description.** Enter a description of the series. The series description will be visible on your sales Channels.
- **Venue.** Use the lookup to select the Venue used for the series. The Venue should have been set up previously as part of your venue configuration. The Venue should be the same Venue as selected for the Fixture.
- **Select Seats.** Select **Yes** if the purchaser is to be allowed to select their own seats when using the Internet sales site.
- **Series Start Date.** Enter the start date of the Series. Any Fixture added to the Series must take place between the Start and End date of the Series it is added too.
- **Sales Plan.** Use the look up to select the appropriate **Series** type Sales Plan.
- **Venue Configuration.** Use the lookup to select the Venue Configuration used for the Series. The venue configuration should have been set up previously as part of your venue configuration. The Venue Configuration should be the same Venue Configuration as selected for the Fixture.
- **Skidata Season Code.** Used for access control.
- **Series Sponsor.** Enter the name of the sponsor for the series. The sponsor can be printed onto your tickets if required.
- **Series End Date.** Enter the end date of the Series. Any Fixture added to the Series must take place between the Start and End date of the Series it is added too.

e) Once the details are complete select **Save** on the ribbon, the Fixtures created in Step 3 must now be added to the Series.

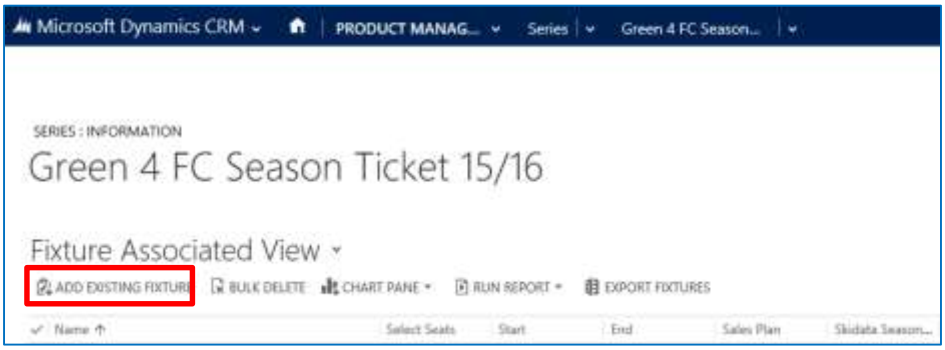
STEP 2: ADD THE FIXTURES TO THE SERIES

If at the time of setting up the Series you do not know the fixtures that will be included, for example if you are setting up a new season ahead of the fixtures being released, this step can be skipped. Fixtures can be added when the details are known. However, it should be remembered that in order for a fixture to be placed on sale, it must be included in at least one Series.

If no Fixtures have currently been created they can be set up by following the instructions in section 2.1. Step 1: Create the Fixtures.

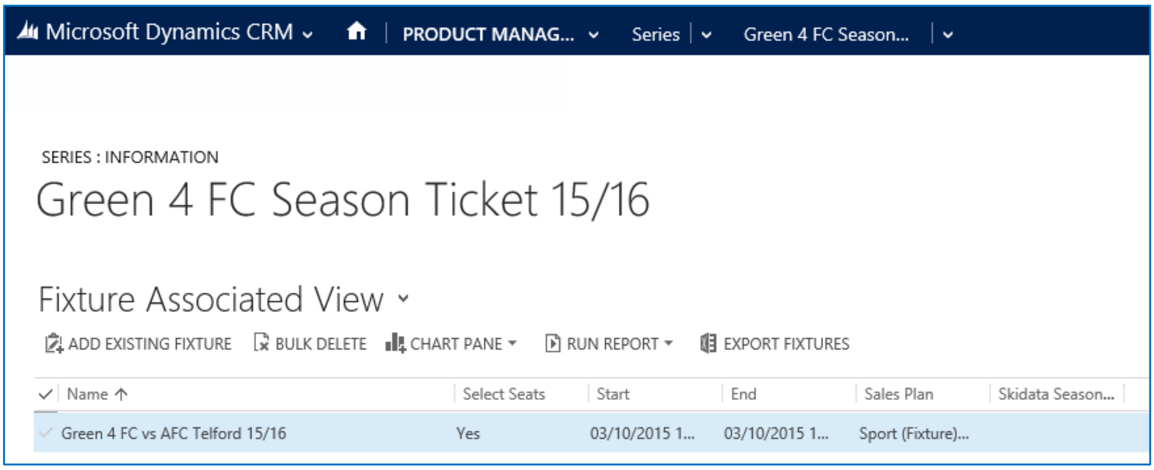
a) With the Series open in the form view, select the small arrow next to the name of the Series in the Navigation area. From the drop down list scroll across and choose **Fixtures.**

b) Any Fixtures that are currently linked to the Series will be displayed. Select **Add Existing Fixture** in the ribbon.



c) A drop down will appear where it is possible to either type and search for the appropriate Fixtures, or alternatively use the magnifying glass at the end of the drop down to Look Up the Fixture.

d) Upon finding the Fixture, select it. The Fixture will appear in the Fixture Associated View and will now be linked to the Series. Repeat the above process for each Fixture that is to be added to the Series.



e) Select **Save** in the bottom right hand corner of the Series form, it is now possible to navigate away.

Note. When moving an existing fixture you must be aware of the potential to double sell seats. For example, a fixture has been sold as part of one series, then moved into a series that is already on sale and the seat has already been sold.

Example of Series Records created

Two Series have been created as examples for this document representing both Leisure and Sporting events. The table shows the mandatory fields that have been completed in each Series form:

Record Type	Name	Venue	Venue Configuration	Select Seats	Series Start and End Date	Sales Plan	Fixture Linked to Series
Series	Bay Rocks Music Concerts	Dragon Bay Arena	Concert Arena Layout	Yes	Start: 01/11/2014 End: 01/06/2015	Events (Series) Sales Plan	Bay Rocks Opening Show Ed Sheeran in concert Diplo in concert Status Quo in concert The Coolies in concert
Series	Green 4 FC Season Ticket 15/16	Green 4 Sports Stadium	Standard Green 4 Sports Stadium Layout	Yes	Start: 17/03/2015 End: 21/07/2016	Sport (Series) Sales Plan	*All league Fixtures in the 15/16 season.

STEP 3: CREATE THE SERIES BOOKABLE PRODUCT

The Bookable Product entity is used to represent products that are sold, for example the season ticket or multi concert ticket. A Series type Bookable Product must be created for a Series to be sold. The Bookable Product is where the Channels the Series is to be sold upon, the pricing of the Series and the Bookable Resource related to it are added.

A Bookable Product must exist for each Bookable Resource related to the Series for example a Standard ticket type, a hospitality ticket type or restricted view ticket type.

It must be noted that a new Bookable Product does not need to be created for each Series that is set up, and previous Bookable Products can be reused.

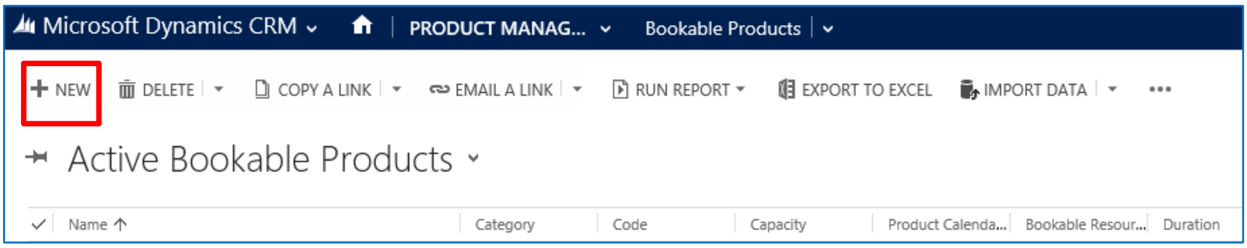
The below example demonstrates how to create a new Series type Bookable Product from the beginning.

To create a Series type Bookable Product:

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**.

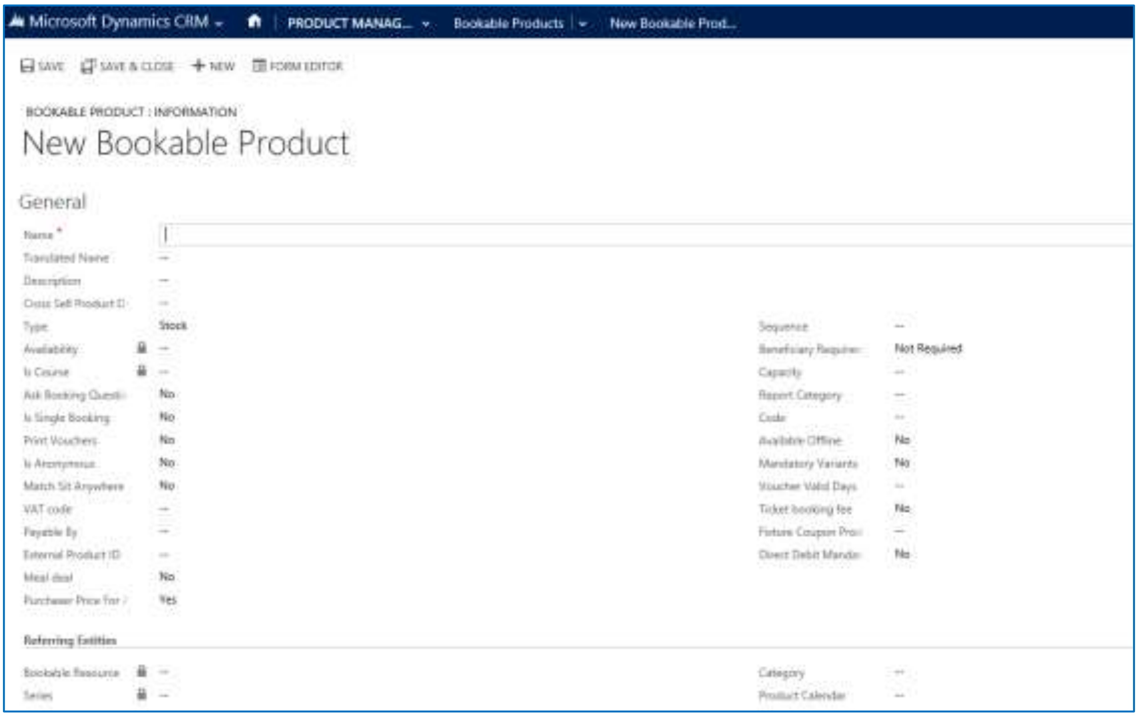
b) Next, in the Product Management area of CRM, select the **Product Management** tab before selecting **Bookable Products** from the drop down.

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 the Bookable Product form that have not been described below do not need to be completed/changed.



General:

- **Name.** Enter a name for the product. The name will be visible to customers, and should therefore reflect the nature of the product, for example Season Ticket 15/16 - Standard or Summer Concerts - Standard.
- **Translated Name.** Used for translated implementations. For more information see the Set up for Multi Lingual using the Translation Field.
- **Description.** Enter a description of the product. The Description field can be set as a translatable string if desired (if used in the Web UI). See the Set up for Multi Lingual using the Translation and Description Field for further information.
- **Type.** Use the drop-down list to select the **Type** this being a **Series**.
- **Is Anonymous.** Select **Yes** if the purchaser is not required to provide a name when buying the product. The channel must also be set to allow the sale of anonymous products.
- **Match Sit Anywhere.** Used for when a customer requests a fixture ticket purchased as part of a Series to be reprinted.
- **Payable By.** If the product can be paid for using direct debit select the direct debit payment method. If the product is not to be paid via Direct Debit, leave this field blank.

- **VAT Code.** If applicable, use the lookup to select the correct tax code for the Bookable Products form.
- **External Product ID.** If applicable this field can be used to link the Bookable Product to an external list of products.
- **Sequence.** If applicable, enter a sequence number for the product. The sequence number is used to determine the order in which products are displayed in the POS and Web channels first.
- **Beneficiary Requirement.** Use the drop-down list to select if a customer's name is required when the product is purchased, for example the details of the ticket purchaser. Select from the following options:
    i. **Not Required.** The customer will not be asked for their name and contact details.
    ii. **Requested.** The customer will be asked for their name and contact details, but can skip this option if they do not wish to provide their details.
    iii. **Required.** The customer must provide their name and contact details. This option should be selected when setting up a season ticket or membership product.
- **Report Category.** This field can be used for reporting purposes to categorise the products sold.
- **Code.** Utilised for Access Control set up.
- **Available Offline.** Select **Yes** if the Bookable Product is to be available for purchase through the offline POS. This option cannot be used for products that require capacity to be monitored.

Referring Entities:

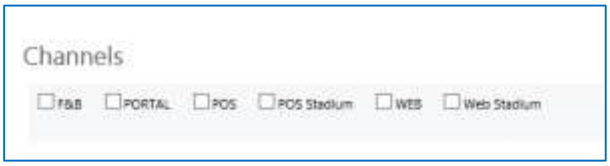
- **Bookable Resource.** The Bookable Resource selected will determine which seats are available to the customer to purchase (for example, Standard, Hospitality, Unseated or Restricted View). Select the Look Up icon alongside the field and find the appropriate Bookable Resource. For each Bookable Resource that is available for this type of ticket, a new Bookable Product form will need to be created. For more information on how to create a Bookable Resource, see the Go CRM 2015 Venue Management User Guide.
- **Series.** Use the Look Up to select the relevant Series that was previously created in Step 1. This will be the Series that the Fixtures for this product were previously added too.
- **Category.** Use the Look Up dialog to select the product Category. The Category is used to group products, for example into tickets, food, etc. The categories are used by the price list and channel editors.

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

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

iv. Scroll down to the **Channels** section of the Bookable Product form

v. The Channels that have been set up during the configuration on your system will be listed. Select the checkbox alongside each Channel through which the product will be sold.

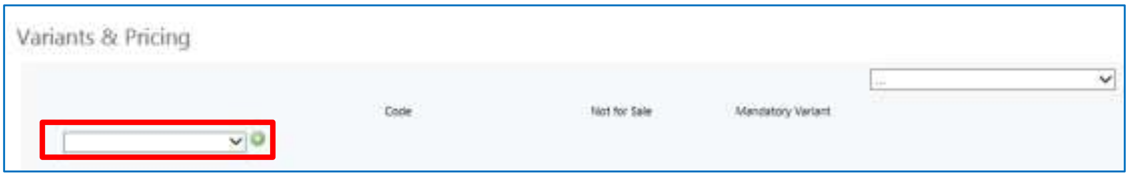


vi. Select **Save** on the ribbon.

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

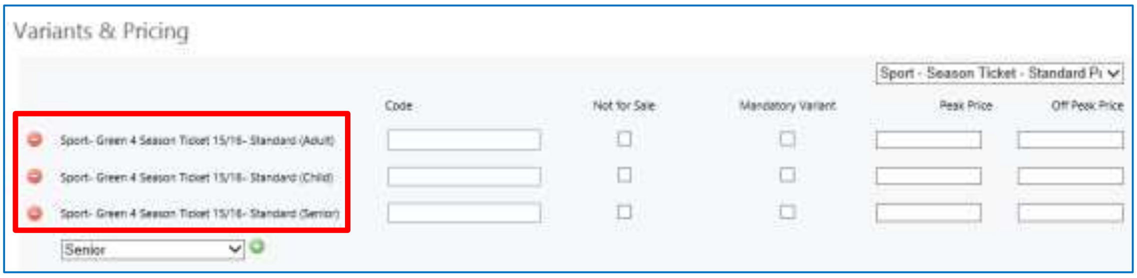
v. Scroll down to the **Variants & Pricing** section of the Bookable Product form.

vi. 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.



vii. Select the green cross alongside the Variant name to add a new Variant.

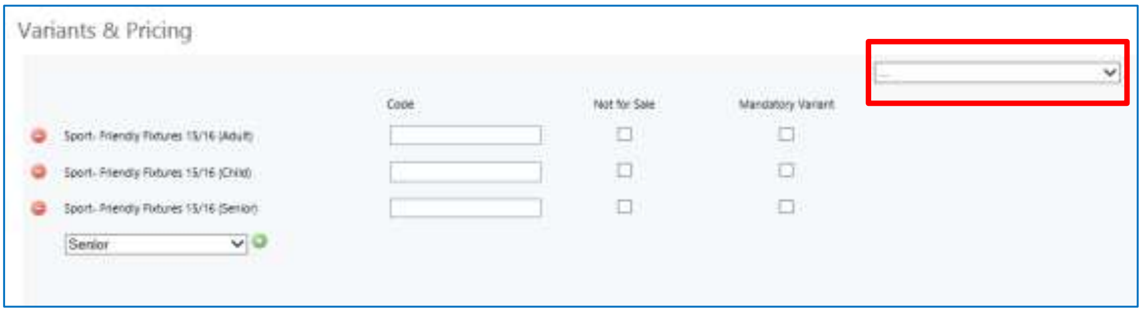
viii. Repeat until all variants are listed. If you need to remove a variant, click the red minus sign alongside the variant.



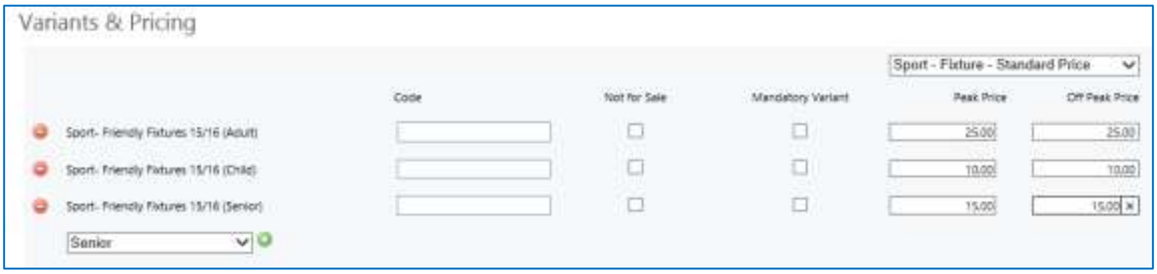
Note. Once a variant is sold it can then not be removed from the Variant and Pricing list. Therefore ensure the correct variants are set up for your product before you begin to sell them.

h) Next, the price of the product must be entered, to do this:

iv. Select the relevant [Variant Price List]() from the drop down at the right hand side of the Variants & Pricing section (highlighted below).



v. Peak Price and Off Peak Price fields will appear upon 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.



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

i) Once 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 products should appear for sale in the selected Channels.

Example of Series type Bookable Products Created

Two Series type Bookable Products have been created as examples for this document representing both Leisure and Sporting events. The table shows the mandatory fields that have been completed in each Bookable Product form. Please note that a new Bookable Product form would need creating for each Bookable Resource that is related to the product.

Record Type	Name	Type	Bookable Resource	Series	Category	Channels	Variants	Variants Price List
Bookable Product	Bay Rocks-Standard	Series	Dragon Bay Arena-Standard	Bay Rocks Music Concert	Concert	POS Web	Adult Senior Students Child	Dragon Bay- Events
Bookable Product	Green 4 FC League Fixtures 15/16-Standard	Series	Green 4 Stadium-Standard	Green 4 FC Season Ticket 15/16	Green 4 League Fixtures 15/16	POS Web	Adult Child Senior	Season Ticket-Standard Price

SERIES ON SALE CHECK LIST

The following checklist can be used to ensure that you have completed all of the tasks required to place a Series on sale:

Task	Completed?	Comments
Created a Fixture type Sales Plan		Ensure the type of Sales Plan created here is Fixture.
Created the Channel Price Lists		The Channel Price List should link the Channels to the Variant Price List. Ensure the On and Off Sale days/hours have been entered.
Created the Series		Ensure that a Venue and Venue Configuration have been entered. Add the Series start and end date. Add the Series type Sales Plan.
Added the Fixtures to the Series		Add all of the Fixtures that are to be associated to the Series to it
Created a Series Bookable Product		Ensure the Bookable Product Type is Series. A Bookable Product must be linked to a Bookable Resource. Ensure the Series that has the chosen fixtures linked to it is added into the Bookable Product Ensure a Category has been added to the Bookable Product
Assigned channels to the bookable product		Ensure the relevant Channel check boxes are ticked.
Assigned variants to the bookable product		Ensure the Variants are added.
Assigned prices to the bookable product		Prices should be added to an active Variant Price List.

EXAMPLES: USING SALES PLANS AND CHANNEL PRICE LISTS TO SET UP A SERIES AND FIXTURES

The examples included below cover the common scenarios we are likely to encounter in a sports environment when creating Sales Plans and Channel Price List for Series and Fixtures.

EXAMPLE 1- PRICING SCHEDULE FOR HOME FIXTURES

The following example illustrates how to set up the following pricing schedule for home Fixtures:

- A product is removed from sale a week before the fixture.
- An event is removed from sale via the web the day before the event.
- Prices increase on event day, 3 hours before the fixture.

It must be noted that all events can be linked to use the same Sales Plan, providing they have the same pricing structure and schedule.

Prior to creating the Sales Plan the following must be set up:

- **Variant Price Lists:**
  - Standard Pricing including the product that is removed a week before the game
  - Standard Pricing excluding the product that is removed a week before the game
  - Event pricing
- **Channels:**
  - Web
  - POS
- **Series** – Current season
- **Fixture** – At least one fixture linked to the current Series
- **Bookable Product** – at least two Fixture type Bookable Products with Variants and Channels set. This should be linked to the current Series.

To set up the desired pricing schedule carry out the following:

1. Open the applicable fixture form. Click the lookup button alongside the Sales Plan field. Select **New** arrow.
2. A blank Sales Plan form will be displayed. Complete the following details:
   a. **Name.** Enter a name for the sales plan. For example Home Fixture 14/15.
   b. **Sales Plan Type.** Select **Fixture** from the drop-down list.
3. Select **Save** on the ribbon.
4. Next create the Channel Price Lists linked to the sales plan. You will need to create a Channel Price List for each channel – variant price list combination. Therefore in this example you will need to create the following Channel Price Lists:
   a. POS - Standard Pricing (Including extra product e.g. Lunch)
   b. POS – Standard Pricing (Excluding extra product)
   c. POS – Event day
   d. Web - Standard Pricing

5. For the price lists to be active at the correct times, it is important to set the relative on/off sale dates as follows:

Channel Price List	On Sale Days Before	On Sale Hours Before	Off Sale Days Before	Off Sale Hours Before
POS - Standard Pricing (Incl. Product)	365 (on sale immediately)		7 (taken off sale 7 days before the event)	
POS - Standard Pricing (Excl.) Product)	7 (on sale 7 days before the event)			5 (off sale 5 hours after - assume fixture is 2 hours long)
POS – Event day		3 (match day pricing applied)	-1 (taken off sale one day after the event in case of returns)	
Web - Standard Pricing	21 (on sale 21 days before the event)		1 (taken off sale 1 day before the event)	

6. When the channel price lists are set up select **Save & Close** on the Channel Price List ribbon
7. As you add fixtures to the existing series, providing the fixture is linked to the existing sales plan, the pricing schedule set up for the initial fixture will be followed for all fixtures. So, in the above example, the day before each fixture web sales will stop.

EXAMPLE 2- SEASON TICKET PRICING USING SALES PLANS

The following example illustrates how to set up the following pricing schedule for season ticket sales:

- Season tickets are offered at a reduced rate when purchased two months before the season starts. The price charged for early bird tickets is determined by a secondary price list rather than a percentage reduction.

Prior to creating the Sales Plan the following must be set up:

- **Variant Price Lists:**
    - Early bird pricing
    - Standard pricing
- **Channels:**
    - Web
    - POS
- **Series** – Current season
- **Bookable Product** – at least one Series type Bookable Product with Variants and Channels set. This should be linked to the current series.

To set up the desired pricing schedule carry out the following:

1. Open the Series details. Click the lookup button alongside the Sales Plan field. Select the **New** arrow.
2. A blank Sales Plan form will be displayed. Complete the following details:

a. **Name.** Enter a name for the sales plan. For example Season 15/16.

b. **Sales Plan Type.** Select **Series** from the drop-down list.

3. Select **Save** on the ribbon.
4. Next create the Channel Price Lists linked to the Sales plan. You will need to create a Channel Price List for each Channel – Variant Price List combination. Therefore in this example you will need to create the following channel price lists:

   a. POS – Early Bird

   b. POS - Standard Pricing

   c. Web – Early Bird

   d. Web - Standard Pricing

5. For the price lists to be active at the correct times, it is important to set the relative on/off sale dates as follows:

Channel Price List	On Sale Days Before	On Sale Hours Before	Off Sale Days Before	Off Sale Hours Before
POS – Early Bird	90		60	
POS - Standard Pricing	60		-100	
Web – Early Bird	90		60	
Web - Standard Pricing	60		-100	

6. When the channel price lists are set up select **Save & Close** on the Channel Price List ribbon.

EXAMPLE 3- SEASON TICKET PRICING USING SALES PLANS – EXAMPLE 2

The following example illustrates how to set up the following pricing schedule for season ticket sales:

- Season tickets are offered at a reduced rate when purchased two months before the season starts. Early bird season tickets are offered at a discounted rate (20% discount).

Prior to creating the sales plan the following must be set up:

- **Variant Price Lists:**
  - Standard pricing
- **Channels:**
  - Web
  - POS
- **Series** – Current season
- **Bookable Product** – at least one Series type Bookable Product with Variants and Channels set. This should be linked to the current Series.

To set up the desired pricing schedule carry out the following:

1. Open the Series details. Click the lookup button alongside the Sales Plan field. Select **New**.

2. A blank Sales Plan form will be displayed. Complete the following details:
    a. **Name.** Enter a name for the Sales Plan. For example Season 15/16.
    b. **Sales Plan Type.** Select **Series** from the drop-down list.
3. Select **Save** on the ribbon.
4. Next create the Channel Price Lists linked to the Sales Plan. You will need to create a Channel Price List for each Channel – Variant Price List - discount combination. Therefore in this example you will need to create the following channel price lists:
    a. POS – Standard Pricing – Discount Applies
    b. POS - Standard Pricing – No Discount
    c. Web – Standard Pricing – Discount Applies
    d. Web - Standard Pricing – No Discount
5. For the price lists to be active at the correct times, it is important to set the relative on/off sale dates as follows:

Channel Price List	On Sale Days Before	On Sale Hours Before	Off Sale Days Before	Off Sale Hours Before	Discount Percent
POS – Standard Pricing – Discount Applies	90		60		20
POS - Standard Pricing – No Discount	60		-100		
Web – Standard Pricing – Discount Applies	90		60		20
Web - Standard Pricing – No Discount	60		-100		

6. When the Channel Price Lists are set up select **Save & Close** on the ribbon.

EXAMPLE 4- SEASON TICKET PRICING USING SALES PLANS

This example illustrates how to set up the following pricing schedule for season ticket sales:

- Season tickets are offered at a reduced rate when purchased two months before the season starts. Existing season ticket holders get a 20% discount on the standard price, whereas other customers get a 10% discount on standard pricing.

Prior to creating the Sales Plan the following must be set up:

- **Variant Price Lists:**
  - Standard pricing
- **Channels:**
  - Web
  - POS
- **Series** – Current season
- **Bookable Product** – At least one Series type Bookable Product with Variants and Channels set. This should be linked to the current series.
- **Marketing list** – All existing Season Ticket holders must be added to the Marketing List

To set up the desired pricing schedule carry out the following:

1. Open the Series details. Click the lookup button alongside the Sales Plan field. Select **New**.
2. A blank Sales Plan form will be displayed. Complete the following details:
   a. **Name.** Enter a name for the Sales Plan. For example Season 14/15.
   b. **Sales Plan Type.** Select **Series** from the drop-down list.
3. Select **Save** on the ribbon.
4. Next create the Channel Price Lists linked to the Sales Plan. You will need to create a Channel Price List for each Channel – Variant Price List - discount combination. Therefore in this example you will need to create the following channel price lists:
   a. POS – Standard Pricing – STH Discount Applies
   b. POS – Standard Pricing – Standard Discount Applies
   c. POS - Standard Pricing – No Discount
   d. Web – Standard Pricing – STH Discount Applies
   e. Web – Standard Pricing – Standard Discount Applies
   f. Web - Standard Pricing – No Discount
5. For the price lists to be active at the correct times, it is important to set the relative on/off sale dates as follows:

Channel Price List	On Sale Days Before	On Sale Hours Before	Off Sale Days Before	Off Sale Hours Before	Discount Percent	Marketing List
POS – Standard Pricing – STH Discount Applies	90		60		20	Season Ticket holders
POS – Standard Pricing – Standard Discount Applies	90		60		10	
POS - Standard Pricing – No Discount	60		-100			
Web – Standard Pricing – STH Discount Applies	90		60		20	Season Ticket Holders
Web – Standard Pricing – Standard Discount Applies	90		60		10	
Web - Standard Pricing – No Discount	60		-100			

6. When the Channel Price Lists are set up select **Save & Close** on the Channel Price List ribbon.

2.3. SETTING UP STOCK TYPE BOOKABLE PRODUCTS

Stock type Bookable Products are used to represent particular types of items for example a range of products such as retail and merchandise products.

The sale of Stock products relies upon a number of entities within the system, all of which must be correctly configured in order to place the product on sale at the correct price. This section covers the sale of basic Stock products and does not describe in detail Go's Food & Beverage offering.

The flow for placing a Stock product on sale is similar to that followed when putting on sale Fixture and Series type products.

For a Stock product to be placed on sale the following Setup must have been completed before creating the Stock type Bookable Product, information on these can be found in Section 1 of this document:

- The Channels that the product is to be sold upon should have been created (See the Go CRM 2015 Infrastructure User Guide for information on Channels if applicable.)
- Variant Types for the stock product must have been created. For example for merchandise products a Variant Type of 'each' could be created whereas for retail products such as clothing the different sizes of the clothes can be created as Variant Types such as Large, Medium and Small.
- Variant Price Lists to enter the prices of the stock type products must also have been created.
- Other Type Sales Plan to link the Channel Price List, must also have been set up. This Sales Plan should also be linked to the Company Details within CRM. This Sales Plan will be used for all Stock, Scheduled and Auto- Scheduled type products
- Channel Price Lists control when the Stock products are shown for Sale and should be linked to the Other type Sales Plan

Additional functionality can be added once the Stock product has been created, information on this functionality can be found in the following sections:

- Delayed Purchase
- Upselling Products (Additional Products)
- Entitlements
- Cross Selling Products

CREATING THE STOCK TYPE BOOKABLE PRODUCT

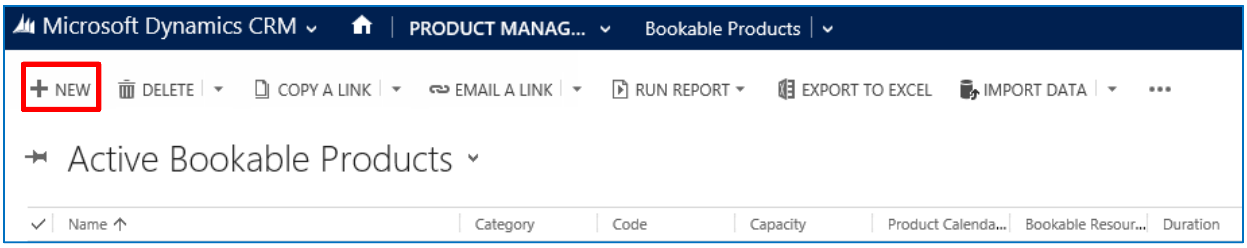
The Stock type Bookable Product entity is used to represent products that are sold, for example merchandise and retail products.

To create a Stock type Bookable Product:

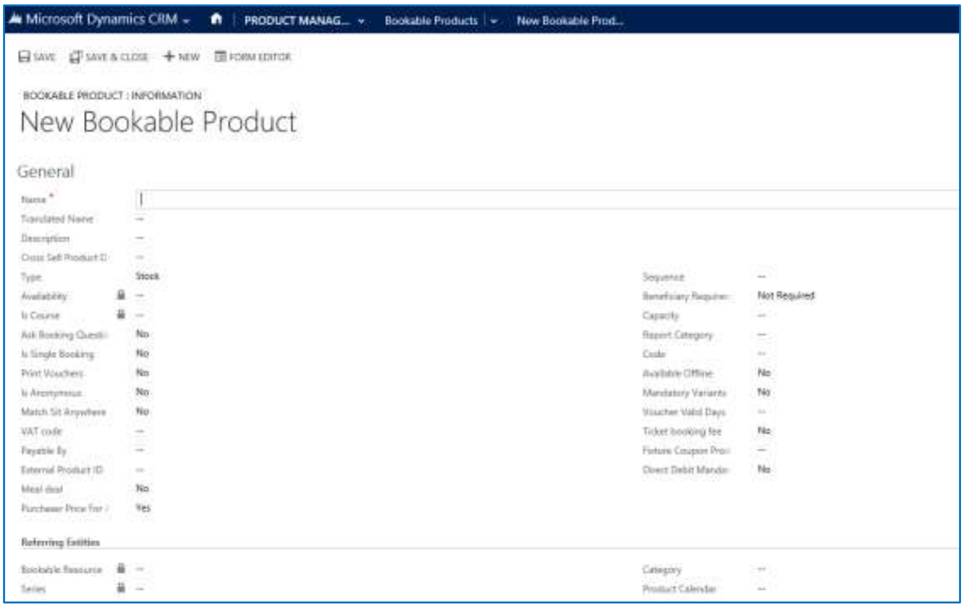
a) Select or hover over the **Microsoft Dynamics CRM** tab before scrolling across the drop down list of the navigation bar and selecting **Product Management**.

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 the Bookable Product form that have not been described below do not need to be completed/changed.

General:

- **Name.** Enter a name for the product. The name will be visible to customers, and should therefore reflect the nature of the product, e.g. Match Day Programme.
- **Translated Name.** Used for translated implementations. See Set up for Multi Lingual using the Translation Field for more information.
- **Description.** Enter a description of the product. The Description field can be set as a translatable string if desired (if used in the Web UI). See the Set up for Multi Lingual using the Translation and Description Field for further information.
- **Type.** Use the drop-down list to select the type of product. In this instance select **Stock** from the list of available values.
- **Is Anonymous.** Select **Yes** if the purchaser is not required to provide a name when buying the product. The channel must also be set to allow the sale of anonymous products.
- **External Product ID.** This can be used to link the bookable product to an external list of products.
- **Sequence.** If applicable, enter a sequence number for the product. The sequence number is used to determine the order in which products are displayed in the POS and Web channels.
- **Beneficiary Requirement.** Use the drop-down list to select if a customer's name is required when the product is purchased. Select from the following options:
    i. **Not Required.** The customer will not be asked for their name and contact details.
    ii. **Requested.** The customer will be asked for their name and contact details, but can skip this option if they do not wish to provide their details.
    iii. **Required.** The customer must provide their name and contact details. This option should be selected when setting up a season ticket or membership product.
- **Report Category.** If applicable this field can be used for reporting purposes to categorise the products sold through Green 4 Ticketing.
- **Available Offline.** Select **Yes** if the bookable product is to be available for purchase through the offline EPOS. This option cannot be used for products that require capacity to be monitored.

Referring Entities:

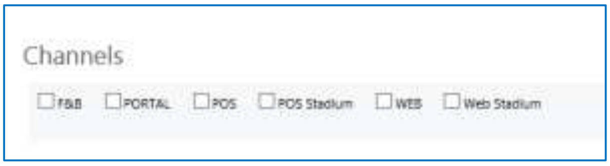
- **Category.** Use the Look Up dialog to select the product category. The category is used to group products, for example into Retail, Tickets, Activities. The categories are used by the price list and channel editors.

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

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

i. Scroll down to the **Channels** section of the Bookable Product form

ii. The Channels that have been set up during the configuration on your system will be listed. Select the checkbox alongside each Channel through which the product will be sold.

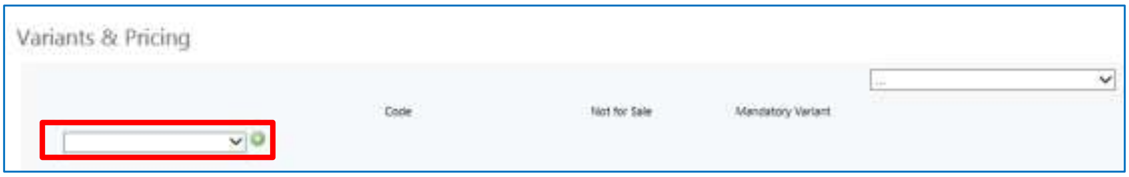


iii. Select **Save** on the ribbon.

g) Next, it is necessary to identify the Product 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.



iii. Select the green cross alongside the Variant name to add a new Variant.

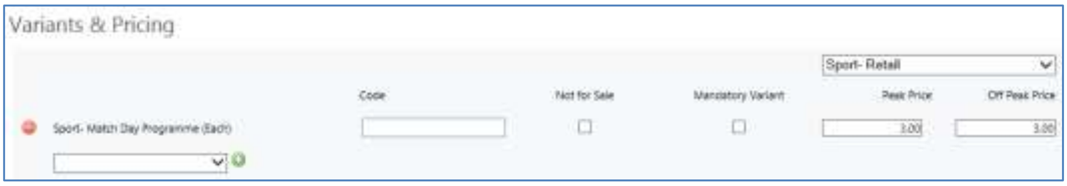
iv. Repeat until all variants are listed. If you need to remove a variant, click the red minus sign alongside the variant.

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 product 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).

ii. Peak Price and Off Peak Price fields will appear upon 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.



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

i) Once 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 products should appear for sale in the selected Channels.

STOCK PRODUCT ON-SALE CHECK LIST

The following checklist can be used to ensure that you have completed all of the tasks required to place a stock product on sale:

Task	Completed?	Comments
Created a Sales Plan type Other		A Sales Plan type of Other should have been created and linked to the Company Details form under CRM. Only one Sales Plan type of Other needs to be created within the system.
Created a Channel Price List		The Channel Price List should be linked to the Sales Plan type Other The Channel price list should link the Channels to the Variant Price List Ensure the Channel Price List on sale dates are valid. For each Channel- Variant Price List combination a new Channel Price List must be created.
Create a Stock type Bookable Product		Ensure the Type of Bookable Product selected is Stock.
Assigned Channels to the Bookable Product		Ensure the relevant Channel check boxes are ticked.
Assigned Variants to the Bookable Product		Ensure the Variants are listed.
Assigned prices to the Bookable Product		Prices should be added to an active Variant Price List.

Example of a Stock type Bookable Product Created

Two Stock type Bookable Products have been created as examples for this document representing both Leisure and Sporting stock products. The table shows the mandatory fields that have been completed in each Bookable Product form.

Record Type	Name	Type	Category	Channels	Variants	Variants Price List
Bookable Product	Dragon Bag	Stock	Retail	POS Web	Each	Dragon Bay- Retail
Bookable Product	Match Day programme	Stock	Retail	POS Web	Each	Retail price List

2.4. SETTING UP AUTO-SCHEDULED TYPE BOOKABLE PRODUCT

Auto Scheduled type products are set up to take place at a certain time on selected dates. An Auto-Scheduled Bookable Product would be relevant to an activity that reoccurs periodically for example a guided tour or certain types of lessons, e.g. Ice Skating. An Auto-Scheduled product could also be used to create a Dated Day Pass type product, where a specific date for the use of the pass is selected.

For an Auto-Scheduled product to be placed on sale the following Setup must have been completed, information on these can be found in Section 1 of this document:

- The Channels that the product is to be sold should have been created (See the Go CRM 2015 Infrastructure User Guide for information on Channels if applicable). Please note that for Auto-Scheduled Products a field in the Channel form must be completed called **MonthsInTheFuture**. The fields must be entered with the number of months that the product is to be available. For example, enter 12 for the product to be available for 12 months.

  To access the Channels select **Venue Management** in the Navigation bar before selecting **Channels** from the drop down and double clicking to open the appropriate Channel form.

MonthsInTheFuture	12

- Variant Types for the Auto-Scheduled products must have been created. For example for an Auto Scheduled product such as a Stadium Tour, the variant types may be Adult, Child and Senior etc.
- Variant Price Lists to be able to enter the prices of the Auto Scheduled type products must have been created.
- Other Type Sales Plan to link the Channel Price List must also have been set up. This Sales Plan should also be linked to the Company Details within CRM. This Sales Plan will be used for all Stock, Scheduled and Auto- Scheduled type products.
- Channel Price Lists to control when the Auto Scheduled type is shown for Sale, and should be linked to the Other type Sales Plan.
- Product Calendars. Product Calendars will govern the on/off sale and peak times for the Bookable Product. See the miscellaneous section of this document for more information on their set up.

Additional functionality can be added once the Auto Scheduled type product has been created, information on this functionality can be found in the following sections:

- Delayed Purchase
- Upselling Productions (Additional Products)
- Reserve Capacity
- Negative Reserve Capacity
- Entitlements

CREATING THE AUTO-SCHEDULED TYPE THE BOOKABLE PRODUCT

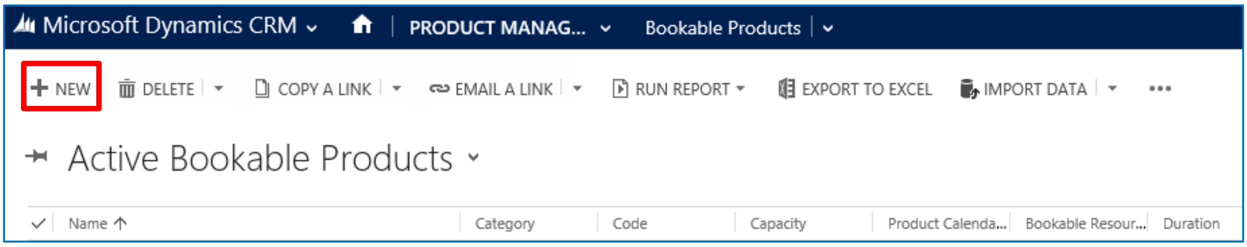
The Bookable Product entity is used to represent products that are sold, such as a Stadium Tour. For each Auto Scheduled product you are selling through the system you must create an Auto Scheduled type Bookable Product.

To set up an Auto Scheduled type Bookable Product:

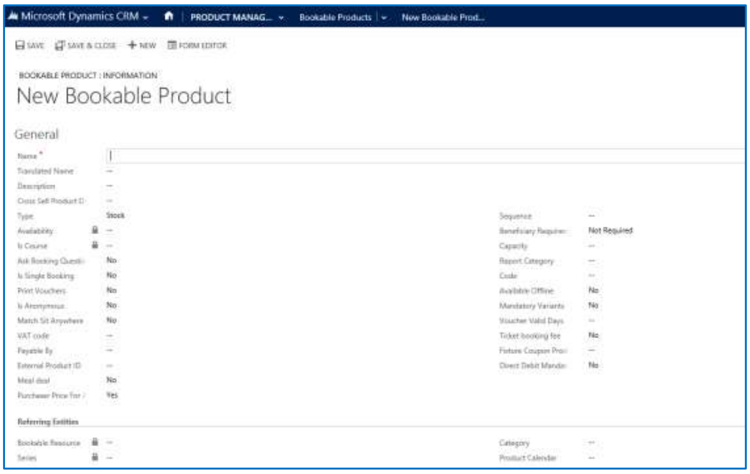
a) Select or hover over the **Microsoft Dynamics CRM** tab before scrolling across the drop down list of the navigation bar and selecting **Product Management**.

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 the Bookable Product form that have not been described below do not need to be completed/changed.

General:

- **Name.** Enter a name for the product. The name will be visible to customers, and should therefore reflect the nature of the product.
- **Translated Name.** Used for translated implementations. For more information see Set up for Multi Lingual using the Translation Field.
- **Description.** Enter a description of the product**.**
- **Type.** From the drop down menu select **AutoScheduled** as the type of your bookable product.
- **Is Single Booking**. Select **Yes** if a single booking of the bookable product uses all available resource. For example you may have a private ski lesson option set up, which can take up to 6 people. However a single booking of only 1 person will effectively block out the entire resource if this option is set to **Yes.**
- **Is Anonymous.** Select **Yes** if the purchaser is not required to provide a name when buying the product. The channel must also be set to allow the sale of anonymous products.
- **External Product ID.** This field can be used to link the bookable product to an external list of products.
- **Sequence.** Enter a sequence number for the product. The sequence number is used to determine the order in which products are displayed in the POS and Web channels.
- **Beneficiary Requirement.** Use the drop-down list to select if a customer's name is required when the product is purchased. Select from the following options:
    - **I. Not Required.** The customer will not be asked for their name and contact details.
    - **II. Requested.** The customer will be asked for their name and contact details, but can skip this option if they do not wish to provide their details.
    - **III. Required.** The customer must provide their name and contact details. This option should be selected when setting up a season ticket or membership product.
- **Capacity.** If a capacity is entered it will only allow the Auto Scheduled type Bookable Product to be sold up to this capacity regardless of the capacity of the underlying Bookable Resource (it cannot sell beyond the capacity of the underlying Bookable Resource). Using this option allows you to limit the number of spaces for a particular activity when sharing resources. For example ice skating lessons may only be allowed to take 20 spaces from the capacity of 100 available. In turn this will limit public skating to 80 spaces if the products share the same ice arena resource.
- **Report Category**. This field can be used for reporting purposes to categorise the products sold through Green 4 Ticketing.
- **Available Offline.** Select **Yes** if the Bookable Product is to be available for purchase through the offline POS. This option cannot be used for products that require capacity to be monitored.

Referring Entities:

- **Bookable Resource.** An Auto Scheduled product must have a Bookable Resource, as the product must have a capacity. The Bookable Resource represents the capacity that bookable products utilise, for example the capacities of a Stadium Tour or ice rink. The Bookable Resource must also be added to a Category although multiple products can use the same Bookable Resource, for example if they share capacity.

  Use the lookup to find a relevant Bookable Resource or select **New** to create a new one. If creating a new Bookable Resource enter the following:

  I. **Name**. Enter the name of the Bookable Resource.

  II. **Capacity.** Enter the capacity of the Bookable Resource in terms of how many people it can hold. For example, how many people can use an ice rink at a set time or how many people can be allocated to a Stadium Tour.

Note. Many products can link into the same Bookable Resources. If two products do link into the same Bookable Resource, for example, if there is an ice skating rink with a capacity of 100 people but some of them have booked for trained lessons and others have turned up on the day. Both of these products will use the same capacity, preventing over bookings from occurring.

  III. **Category.** Use the Lookup to select the category or select New to create a new category.

  IV. Leave all other fields blank.

  V. Select **Save and Close** on the ribbon and you will return to your Bookable product form.

- **Category.** Use the lookup to select the category of product or select **New** to create a new category. The category is used to group products, for example into Retail, Tickets or Activities.

- **Product Calendar.** Select the product calendar which will manage the on/off sale and peak times for the Bookable Product. See Product Calendars within the miscellaneous section for more information.

Time Settings:

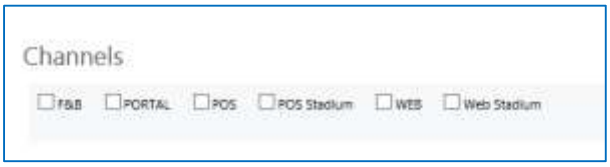
- **Available Date From.** Enter the date the product goes on sale.
- **Available Time From.** If applicable, enter the time the product goes on sale.
- **Duration.** Enter the duration of the session e.g. a stadium tour may last 1 hour.
- **Available Date To.** Enter the date the product is removed from sale.
- **Available Time To.** If applicable, enter the time the product is removed from sale.
- **Interval.** Enter how often the session reoccurs i.e. a stadium tour may occur every 15 minutes.

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

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

  iv. Scroll down to the **Channels** section of the Bookable Product form

v. The Channels which have been set up during the configuration of your system will be listed. Select the checkbox alongside each Channel through which the product will be sold.

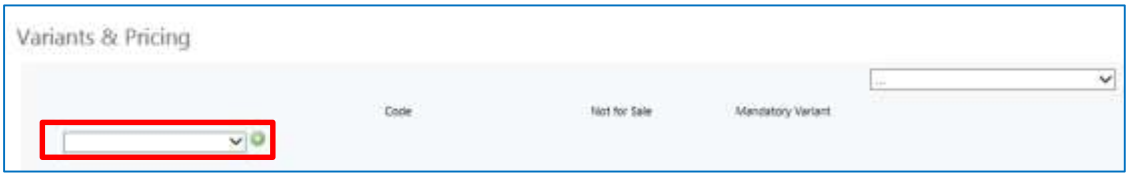


vi. Select **Save** on the ribbon.

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

v. Scroll down to the **Variants & Pricing** section of the Bookable Product form.

vi. 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.



vii. Select the green cross alongside the Variant name to add a new Variant.

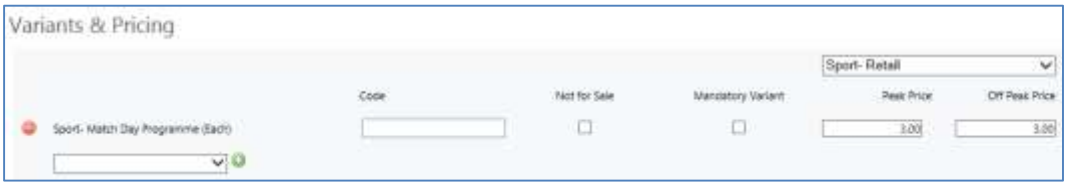
viii. Repeat until all variants are listed. If you need to remove a variant, click the red minus sign alongside the variant.

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 product must be entered, to do this:

iv. Select the relevant **Variant Price List** from the drop down at the right hand side of the Variants & Pricing section (highlighted below).

v. Peak Price and Off Peak Price fields will appear upon selecting the appropriate Variant Price List. If Peak Price and Off Peak Pricing is to be used for the product, enter the differing prices in the Peak and Off Peak Price fields. If not, the same price information should be entered in each field.



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

i) Once 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 products should appear for sale in the selected Channels.

AUTO SCHEDULED PRODUCT ON-SALE CHECK LIST

The following checklist can be used to ensure that you have completed all of the tasks required to place an Auto Scheduled product on sale:

Task	Completed?	Comments
Created a Sales Plan type Other		A Sales Plan type of Other should have been created and linked to the Company Details form under CRM. Only one Sales Plan type of Other needs to be created within the system.
Created a Channel Price List		The Channel Price List should be linked to the Sales Plan type Other The Channel price list should link the Channels to the Variant Price List Ensure the Channel Price List on sale dates are valid. For each Channel- Variant Price List combination a new Channel Price List must be created.
Created an Auto Scheduled type Bookable Product		Ensure the Type selected is AutoScheduled Ensure the Available Date From and To dates are valid. Ensure Duration and Interval times have been entered.
Added a Bookable Resource to the Bookable Product form		Ensure a Bookable Resource has been added to the Bookable Product form. The Bookable Resource represents the capacity that Bookable Products utilise, for example the capacity of a stadium tour or ice rink.
Added a valid Product Calendar to the Bookable Product form.		The Product Calendar which will manage the on/off sale and peak times for the Auto Scheduled Bookable Product.
Assigned Channels to the Bookable Product form		Ensure the relevant Channel check boxes are ticked.

Assigned Variants to the Bookable Product form		Ensure the Variants are listed.
Assigned prices to the Bookable Product form		Prices should be added to an active Variant Price List.

Example of Auto-Scheduled type Bookable Products Created

Two Auto-Scheduled type Bookable Products have been created as examples for this document representing both Leisure and Sports. The table shows the mandatory fields that have been completed in each Bookable Product form.

Record Type	Name	Type	Bookable Resource	Category	Product Calendar	Available Date From/To	Duration	Interval	Channels	Variants	Variants Price List
Bookable Product	Ice Skating	Auto Scheduled	Ice Rink Arena	Ice Skating	Ice Skating Calendar	From 01/10/2015 To 01/04/2015	1 hour	15 minutes	POS Web	Adult Senior Students Child	Dragon Bay- Ice Skating
Bookable Product	Green 4 Sporting Club Stadium Tour	Auto Scheduled	Sporting Club Green 4 Stadium Tour	Stadium Tours	Stadium Tours Calendar	From 03/03/2015 To 01/12/2015	1.5 hours	2 hours	POS Web	Adult Child Senior	Sport- Stadium Tour

2.5. SETTING UP SCHEDULED BOOKABLE PRODUCTS

Scheduled Bookable Products are those that the administrator has control of, as they are scheduled for a certain date and time for an activity to take place via the use of a scheduler. Times when a Scheduled type product would be used could include booking a lesson e.g. a skiing lesson at a particular time, booking a table in a restaurant or booking a time slot for a multi-use games area.

For an Auto-Scheduled product to be placed on sale the following Setup must have been completed, information on these can be found in Section 1 of this document:

- The Channels that the product is to be sold upon should have been created (See the Go CRM 2015 Infrastructure User Guide for information on Channels if applicable). Please note that for Scheduled Products a field in the Channel form must be completed called **MonthsInTheFuture**. The fields must be entered with the number of months that the product is to be available for. For example, enter 12 for the product to be available for 12 months.

  To access the Channels select **Venue Management** in the Navigation bar before selecting **Channels** from the drop down and double clicking to open the appropriate Channel form.

MonthsInTheFuture	12

- Variant Types for the Scheduled products must have been created. For example for a Scheduled product such as a lesson, the variant types may be Adult, Child and Senior etc.
- Variant Price Lists to be able to enter the prices of the Scheduled type products must have been created.
- Other Type Sales Plan to link the Channel Price List must also have been set up. This Sales Plan should also be linked to the Company Details within CRM. This Sales Plan will be used for all Stock, Scheduled and Auto-Scheduled type products.
- Channel Price Lists control when the Scheduled type is shown for Sale and should be linked to the Other type Sales Plan.
- Product Calendars will govern the on/off sale and peak times for the Bookable Product. See the miscellaneous section of this document for more information.

The steps below demonstrate how to set up the Scheduled type Bookable Product before going on to explain how to Schedule sessions using the Scheduler

Additional functionality can be added once the Scheduled type product has been created, information on this functionality can be found in the following sections:

- Delayed Purchase
- Upselling Productions (Additional Products)
- Reserve Capacity
- Negative Reserve Capacity
- Entitlements

STEP 1. CREATING THE SCHEDULED TYPE BOOKABLE PRODUCT

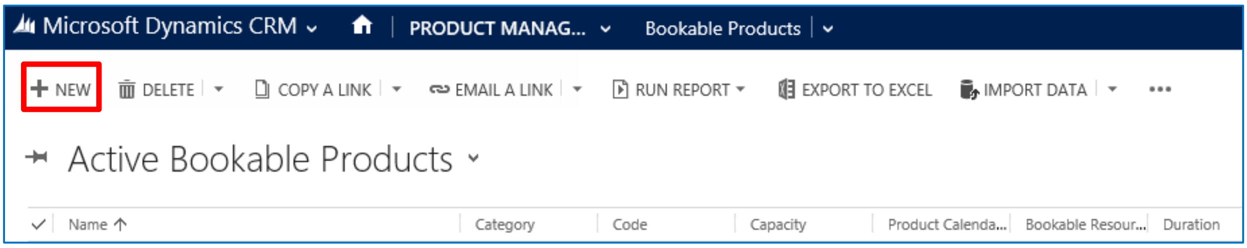
The Bookable Product entity is used to represent products that are sold. For each Scheduled product that you are selling through the system you must create a Scheduled type Bookable Product.

To create a Scheduled type Bookable Product:

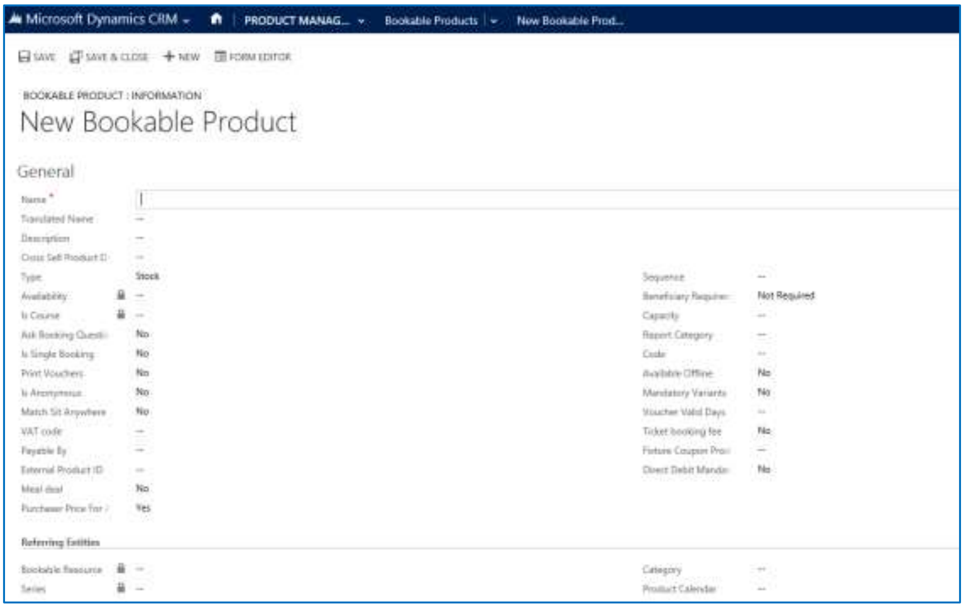
a) Select or hover over the **Microsoft Dynamics CRM** tab before scrolling across the drop down list of the navigation bar and selecting **Product Management**.

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 the Bookable Product form that have not been described below do not need to be completed/changed.

General:

- **Name.** Enter a name for the product. The name will be visible to customers, and should therefore reflect the nature of the product.
- **Translated Name.** Used for translated implementations. See the set up for Multi Lingual using the Translation Field for more information.
- **Description.** Enter a description of the product. The Description field can be set as a translatable string if desired (if used in the Web UI). See the Set up for Multi Lingual using the Translation and Description Field for further information.
- **Type.** From the drop down menu select the Type as **Scheduled.**
- **Is Single Booking**. Select **Yes** if a single booking of the Bookable Product uses all available resource. For example you may have a private ski lesson option set up which can take up to 6 people. However a single booking of only 1 person will effectively block out the entire resource if this option is set to **Yes**.
- **Is Anonymous.** Select **Yes** if the purchaser is not required to provide a name when buying the product. The channel must also be set to allow the sale of anonymous products.
- **External Product ID.** This field can be used to link the bookable product to an external list of products.
- **Sequence.** If applicable, enter a sequence number for the product. The sequence number is used to determine the order in which products are displayed in the POS and Web channels.
- **Beneficiary Requirement.** Use the drop-down list to select if a customer's name is required when the product is purchase. Select from the following options:
    i. **Not Required.** The customer will not be asked for their name and contact details.
    ii. **Requested.** The customer will be asked for their name and contact details, but can skip this option if they do not wish to provide their details.
    iii. **Required.** The customer must provide their name and contact details. This option should be selected when setting up a season ticket or membership product.
- **Capacity.** If a capacity is entered it will only allow the Bookable Product to be sold up to this capacity regardless of the capacity of the underlying Bookable Resource (it cannot sell beyond the capacity of the underlying Bookable Resource). Using this option allows you to limit the number of spaces for a particular activity when sharing resources. For example ice skating lessons may only be allowed to take 20 spaces from the capacity of 100 available. In turn this will limit public skating to 80 spaces if the products share the same ice arena resource.
- **Report Category.** This field can be used for reporting purposes to categorise the products sold through Green 4 Ticketing.

- **Available Offline.** Select **Yes** if the bookable product is to be available for purchase through the offline POS. This option cannot be used for products that require capacity to be monitored.

Referring Entities:

- **Bookable Resource.** A Scheduled product must have a Bookable Resource as the product has to have a capacity. The Bookable Resource represents the capacity that bookable products utilise, for example the capacity of a stadium tour or ice rink. The Bookable Resource must also be added to a Category and multiple products can use the same Bookable Resource, for example if they share capacity.

  Use the lookup to find a relevant Bookable Resource or select **New** to create a new one. If creating a new Bookable Resource enter the following:

  VI. **Name**. Enter the name of the Bookable Resource.

  VII. **Capacity.** Enter the capacity of the Bookable Resource in terms of how many people it can hold. For example, how many people can use an ice rink at a set time or how many people can be allocated to a stadium tour.

Note. Many products can link into the same Bookable Resources. If two products do link into the same Bookable Resource, for example, if there is an ice skating rink with a capacity of 100 people but some of them have booked for trained lessons and others have turned up on the day. Both of these products will use the same capacity, preventing over bookings from occurring.

  VIII. **Category.** Use the Lookup to select the category or select New to create a new category.

  IX. Leave all other fields blank.

  X. Select **Save and Close** on the ribbon and you will return to your Bookable product form.

- **Category.** Use the lookup to select the category of product or select **New** to create a new category. The category is used to group products, for example into Retail, Tickets or Activities.

- **Product Calendar.** Select the product calendar that will manage the on/off sale and peak times for the Bookable Product. See Product Calendars within the miscellaneous section for more information.

Time Settings:

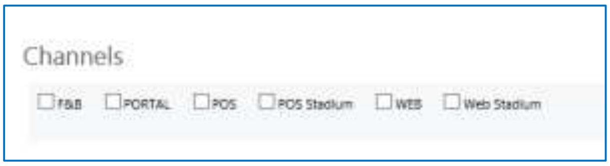
- **Available Date From.** Enter the date the product goes on sale.
- **Available Time From.** If applicable, enter the time the product goes on sale.
- **Duration.** Enter the duration of the session i.e. a lesson may last 1 hour.
- **Available Date To.** Enter the date the product is removed from sale.
- **Available Time To.** If applicable, enter the time the product is removed from sale.

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

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

vii. Scroll down to the **Channels** section of the Bookable Product form

viii. The Channels which have been set up during the configuration of your system will be listed. Select the checkbox alongside each Channel through which the product will be sold.

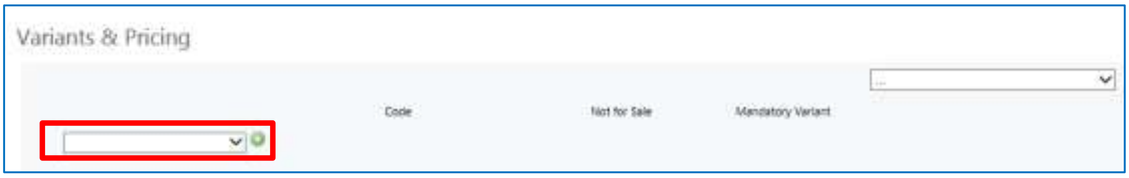


ix. Select **Save** on the ribbon.

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

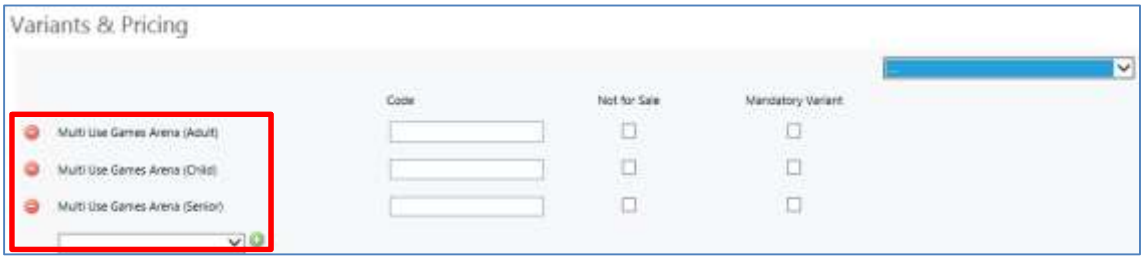
ix. Scroll down to the **Variants & Pricing** section of the Bookable Product form.

x. 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 be displayed in the relevant categories.



xi. Select the green cross alongside the Variant name to add a new Variant.

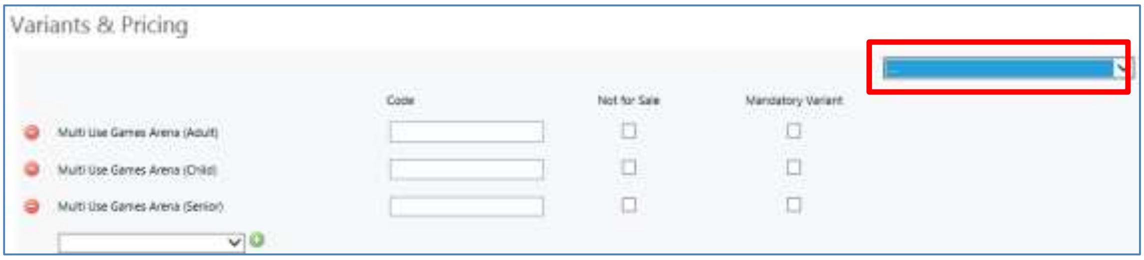
xii. Repeat until all variants are listed. If you need to remove a variant, click the red minus sign alongside the variant.



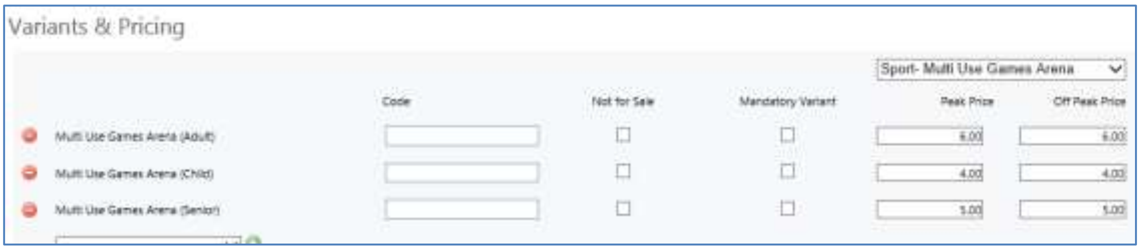
Note. Once a variant is sold it can then not be removed from the Variant and Pricing list. Therefore ensure the correct variants are set up for your product before you begin to sell them.

h) Next, the price of the product must be entered, to do this:

vii. Select the relevant **Variant Price List** from the drop down at the right hand side of the Variants & Pricing section (highlighted below).



viii. Peak Price and Off Peak Price fields will appear upon selecting the appropriate Variant Price List. If Peak Price and Off Peak Pricing is to be used for the product, enter the differing prices in the Peak and Off Peak Price fields. If not, the same price information should be entered in each field.

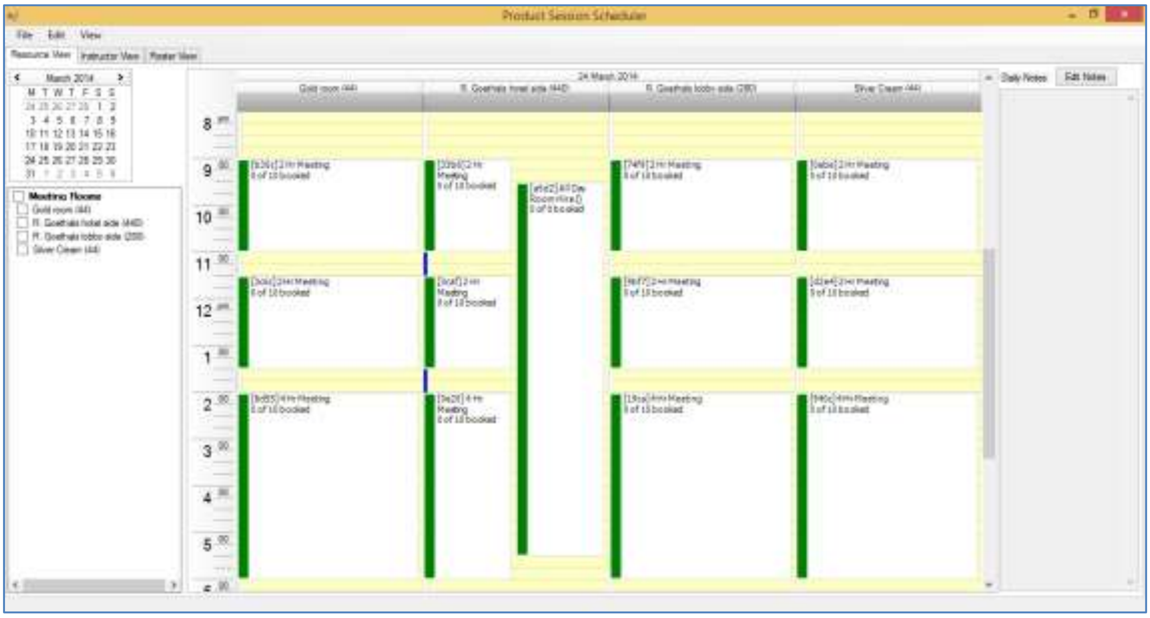


ix. Repeat this process for each Variant Price List used to govern the pricing of the selected product.

i) Once 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 products should appear for sale in the selected Channels.

STEP 2: SCHEDULE THE SESSIONS

Sessions must be scheduled using the Go's Scheduler. When the Scheduler is opened it will display in a calendar format as shown below. When a session is scheduled a new product session will be created in CRM.

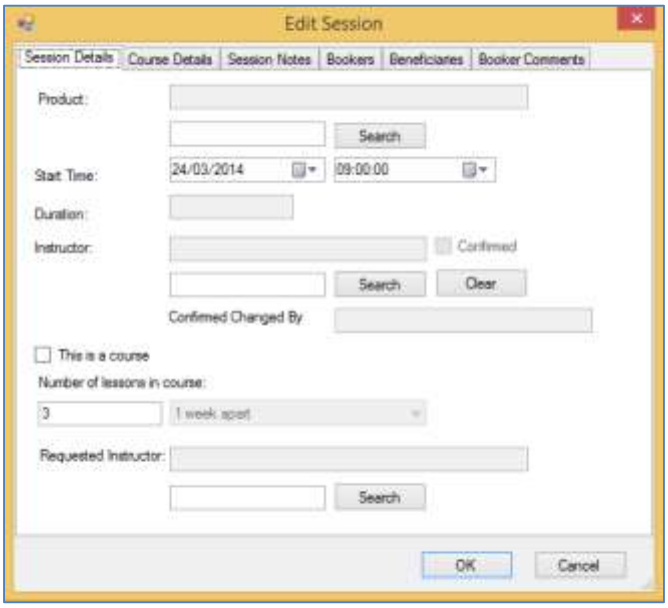


To schedule a product against a resource carry out the following:

a) Select the resource in the column in the left hand side of the Scheduler.

b) Double click on a line when you want a Scheduled product to start from (i.e. 9am)

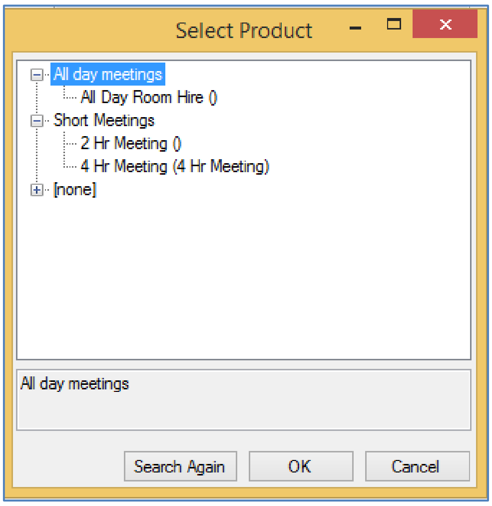
c) This will open up the Session Editor window:



d) Fill in the following details:

- **Product.** To select the product you want to schedule, select the **Search** box. This will open up the product selection window:

  From here users are able to select the products that were set up in CRM. The Product Category is used to categorise particular products.



- **Start Time.** This gives users the ability to modify the time and date the scheduled product needs to begin.
- **Duration.** This will be automatically occupied with the duration set on the Bookable Product when set up in CRM and cannot be changed from here
- **Instructor.** If the Scheduled Product requires an instructor then the relevant instructor can be searched for and added here
- **Course selection box.** This check box is used if a series of room linked products are required. For example if a Monday morning product is required on 3 consecutive weeks, the details entered here will be replicated over the relevant time span.
- **Requested instructor.** This is used to request an instructor, subject to their availability

SCHEDULED PRODUCT ON SALE CHECK LIST

The following checklist can be used to ensure that you have completed all of the tasks required to place a Scheduled type product on sale:

Task	Completed?	Comments
Created a Sales Plan type Other		A Sales Plan type of Other should have been created and linked to the Company Details form under CRM. Only one Sales Plan type of Other needs to be created within the system.
Created a Channel Price List		The Channel Price List should be linked to the Sales Plan type Other The Channel price list should link the Channels to the Variant Price List Ensure the Channel Price List on sale dates are valid. For each Channel - Variant Price List combination a new Channel Price List must be created.
Create a Scheduled type Bookable Product		Ensure the Type selected is Scheduled Ensure the Available Date From and To dates are valid. Ensure the Duration time have been entered.
Added a Bookable Resource to the Bookable Product form		Ensure a Bookable Resource has been added to the Bookable Product form. The Bookable Resource represents the capacity that Bookable Products utilise, for example the capacity of a stadium tour or ice rink.
Added a valid Product Calendar to the Bookable Product form.		The Product Calendar which will manage the on/off sale and peak times for the Auto Scheduled Bookable Product.
Assigned Channels to the Bookable Product		Ensure the relevant Channel check boxes are ticked.
Assigned Variants to the Bookable Product		Ensure the Variants are listed.
Assigned prices to the Bookable Product form		Prices should be added to an active Variant Price List.
Scheduled the Sessions		Ensure sessions are scheduled using the Scheduler

Example of Scheduled type Bookable Products Created

Two Scheduled type Bookable Products have been created as examples for this document representing both Leisure and Sports. The table shows the mandatory fields that have been completed in each Bookable Product form.

Record Type	Name	Type	Bookable Resource	Category	Product Calendar	Available Date From/To	Duration	Channels	Variants	Variants Price List
Bookable Product	Dragon Show	Scheduled	Dragon Show Theatre	Dragon Show	Dragon Show Calendar	From 01/10/2015 To 01/04/2015	30 minutes	POS Web	Adult Senior Students Child	Dragon Bay-Dragon Show
Bookable Product	Multi Use Games Arena	Scheduled	Multi Use Games Arena	Sports-Activities	Multi use Games Arena Calendar	From 03/03/2015 To 01/12/2015	1.5 hours	POS Web	Adult Child Senior	Sport-Multi use Games Arena

2.6. SETTING UP PRODUCTS AS MEMBERSHIPS

Membership Bookable Products often allow access to specified activities or events for a certain period of time. Memberships can last for varying durations and can also offer discounts and promotions for certain products. A Membership usually has an associated Membership Number.

Memberships are created as Stock type Bookable Products but then require additional fields to be completed on the Bookable Product form.

For a Stock product to be placed on sale the following Setup must have been completed before creating the Stock type Bookable Product, information on these can be found in Section 1 of this document:

- The Channels that the product is to be sold should have been created (See the Go CRM 2015 Infrastructure User Guide for information on Channels).
- Variant Types for the Membership must have been created as different prices for Memberships may exist for Adults, Juniors and Seniors.
- Variant Price Lists to be able to enter the prices of the Membership must also have been created.
- Other Type Sales Plan to link the Channel Price List must have been set up. This Sales Plan should also be linked to the Company Details within CRM. This Sales Plan will be used for all Stock, Scheduled and Auto- Scheduled type products
- Channel Price Lists to control when the Membership is shown on Sale and should be linked to the Other type Sales Plan

Please note that Pass setting can now be used in conjunction with the settings of a Membership product. For examples of these and how they are set up please see the Pass and Membership Settings Scenarios section of this document.

Additional functionality can be added when the Membership product has been created. Information on this functionality can be found in the following sections:

- Delayed Purchase
- Upselling Products (Additional Products)
- Entitlements
- Cross Selling Products
- Capturing a Photo for the Membership
- Membership Number Set Up

CREATE THE MEMBERSHIP BOOKABLE PRODUCT

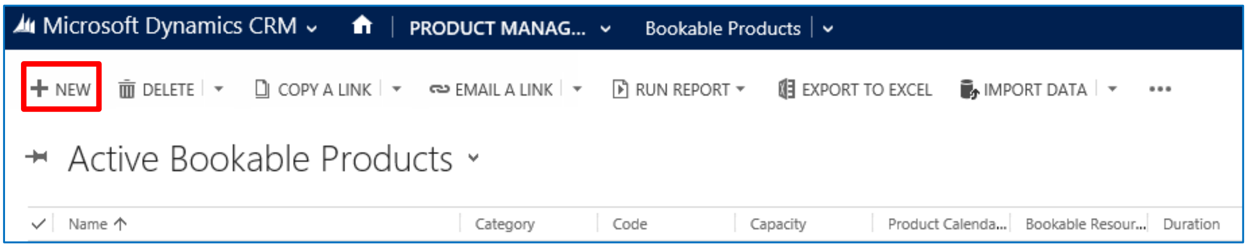
The Bookable Product entity is used to represent products that are sold as Membership Products.

To set up a Bookable Membership Product carry out the following:

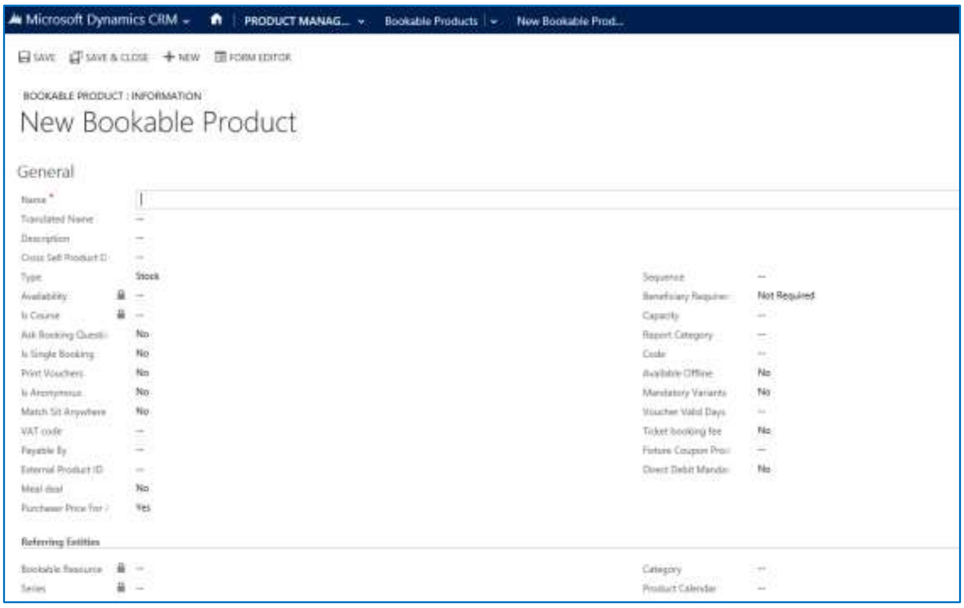
a) Select or hover over the **Microsoft Dynamics CRM** tab before scrolling across the drop down list of the navigation bar and selecting **Product Management**.

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 the Bookable Product form that have not been described below do not need to be completed/changed.

General:

- **Name.** Enter a name for the product. The name will be visible to customers, and should therefore reflect the nature of the product.
- **Translated Name.** Used for translated implementations. For more information see the set up for Multi Lingual using the Translation Field
- **Description.** Enter a description of the product. The Description field can be set as a translatable string if desired (if used in the Web UI). See the Set up for Multi Lingual using the Translation and Description Field for further information.
- **Type.** Use the drop-down list to select the type of product. For Memberships select **Stock** from the list of available values. Pass product settings can now be used in conjunction with the settings of a Membership product and the Type **Pass** can be chosen. For more information on the Membership scenario settings using the Type **Pass** see Membership Product Scenarios.
- **Payable By.** If the product 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 product.
- **External Product ID.** This field may be used for access control.
- **Sequence.** Enter a sequence number for the product. The sequence number is used to determine the order in which products are displayed in the POS and Web channels.
- **Beneficiary Requirement.** Use the drop-down list to select if a customer's name is required when the product is purchased, for example the details of the season ticket holder. Select from the following options:
    i. **Not Required.** The customer will not be asked for their name and contact details.
    ii. **Requested.** The customer will be asked for their name and contact details, but can skip this option if they do not wish to provide their details.
    iii. **Required.** The customer must provide their name and contact details. This option should be selected when setting up a season ticket or membership product.
- **Available Offline.** Select **Yes** if the bookable product is to be available for purchase through the offline POS. This option cannot be used for products that require capacity to be monitored.

Referring Entities:

- **Category.** Use the Look Up dialog to select the product Category. The category is used to group products, for example into Memberships, food, etc. The categories are used by the price list and channel editors.

Membership and Pass setting:

- **Collect Start Date.** If the date of the beginning of the Membership can be selected for a specific day, select **Yes,** this will allow a date picker to be displayed on the relevant Channel**.** If the date of the beginning of the Membership cannot be selected for a specific day, select **No**. This would be used if creating for example a Dated Annual Membership. Please note, that if collecting a start date, the Beneficiary option must be selected to either Required or Requested.

Membership:

- Is **Membership.** Select **Yes** when creating a Membership.
- **Membership Duration.** If the Membership is for a specific duration enter the number that the Membership will be valid for. The duration will be used in conjunction with the entry in the Membership Duration Unit field.
- **Membership End Day**. If the end day and/or month of the Membership are specified, the next date which matches these values will be used as the expiry date. This should be used for Membership products with a defined end date rather than a duration.
- **Membership Duration Unit.** If the Membership is for a specific duration select the Membership Duration Unit, for example is the membership duration counted in **weeks**, **months** or **years**. This field will be used in conjunction with the Membership Duration Field.
- **Membership End Month**. If the end day and/or month are specified, the next date which matches these values will be used as the expiry date. This should be used for Membership products with a defined end date rather than a duration.
- **Number of Days to Activate.** If applicable for the Membership, enter the number of days from the purchase date that a product must be activated, before activation is no longer allowed.

Time Settings:

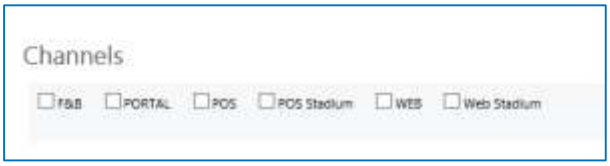
- **Update Start On First Use.** Select **Yes** if the start date of a Membership product will update on first use. Select **No** if the start date of the Membership product will not update on first use.

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

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

i. Scroll down to the **Channels** section of the Bookable Product form

ii. The Channels which have been set up during the configuration of your system will be listed. Select the checkbox alongside each Channel through which the product will be sold.

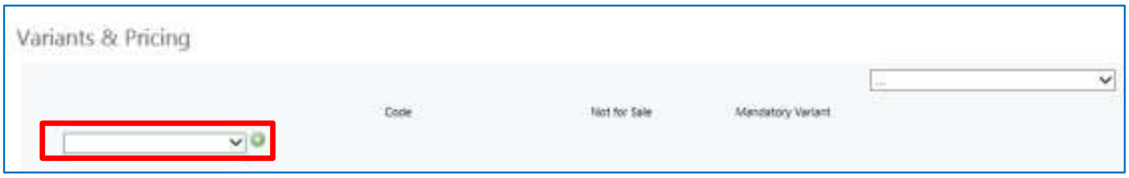


iii. Select **Save** on the ribbon.

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

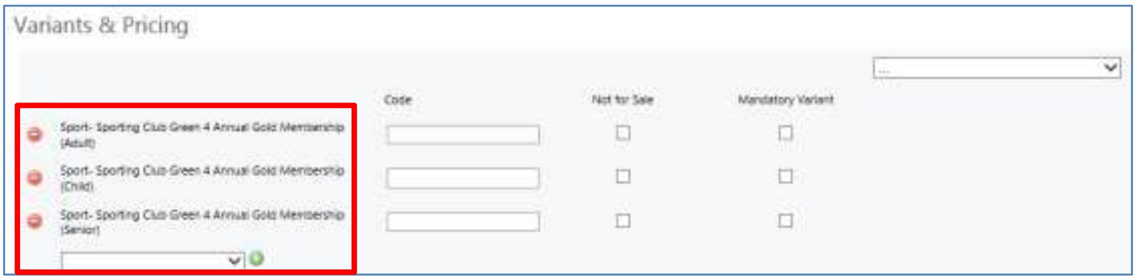
i. Scroll down to the **Variants & Pricing** section of the Bookable Product form.

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.



iii. Select the green cross alongside the Variant name to add a new Variant.

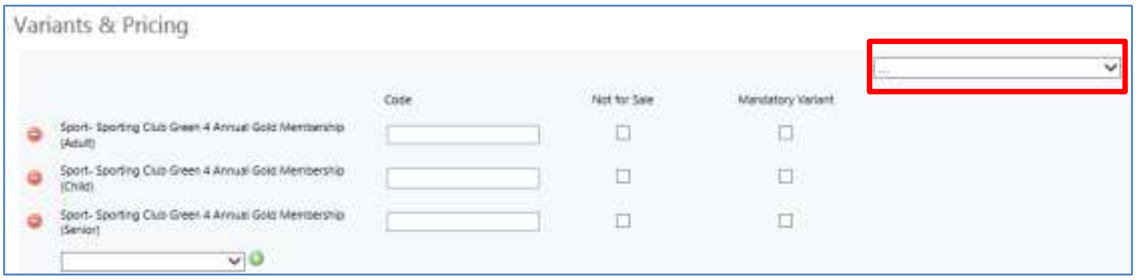
iv. Repeat until all variants are listed. If you need to remove a variant, click the red minus sign alongside the variant.



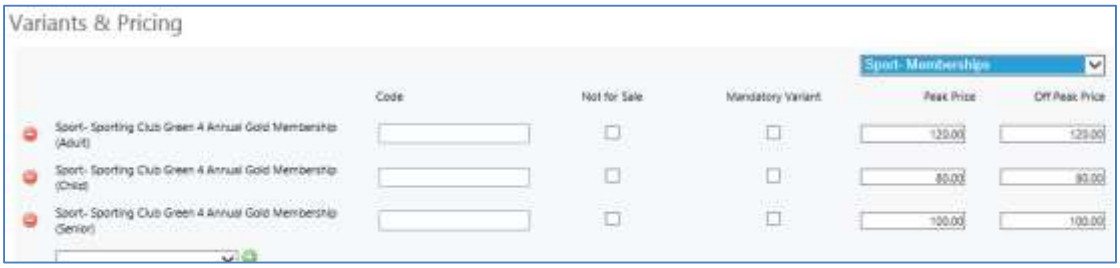
Note. Once a variant is sold it can then not be removed from the Variant and Pricing list. Therefore ensure the correct variants are set up for your product before you begin to sell them.

h) Next, the price of the product 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).



ii. Peak Price and Off Peak Price fields will appear upon 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.



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

i) Once 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 products should appear for sale in the selected Channels.

MEMBERSHIP ON-SALE CHECK LIST

The following checklist can be used to ensure that you have completed all of the tasks required to place a Membership on sale:

Task	Completed?	Comments
Created a Sales Plan type Other		A Sales Plan type of Other should have been created and linked to the Company Details form under CRM. Only one Sales Plan type of Other needs to be created within the system.
Created a Channel Price List		The Channel Price List should be linked to the Sales Plan type Other The Channel price list should link the Channels to the Variant Price List Ensure the Channel Price List on sale dates are valid. For each Channel- Variant Price List combination a new Channel Price List must be created.
Create a Stock type Bookable Product		Ensure the Type of Bookable Product selected is Stock. Set the Is Membership flag to Yes

		Complete the additional Membership details within the Bookable Product form Add a Category to the Bookable Product form
Assigned Channels to the Bookable Product		Ensure the relevant Channel check boxes are ticked.
Assigned Variants to the Bookable Product		Ensure the Variants are listed.
Assigned prices to the Bookable Product		Prices should be added to an active Variant Price List.

Example of a Membership Bookable Products Created

Three Annual Membership Bookable Products have been created as examples for this document. The table shows the mandatory fields which have been completed in each Bookable Product form. It must be remembered that the Pass product settings can now be used in conjunction with the settings of a Membership product, for examples of this see the Pass and Membership Settings Scenarios of this document.

Record Type	Name	Type	Category	Is Membership	Membership Duration	Membership Duration Unit	Channels	Variants	Variants Price List
Bookable Product	Gold Annual Membership	Stock	Membership	Yes	1	Year	POS Web	Adult Senior Child	Membership Price List
Bookable Product	Silver Annual Membership	Stock	Membership	Yes	1	Year	POS Web	Adult Senior Child	Membership Price List
Bookable Product	Bronze Annual Membership	Stock	Membership	Yes	1	Year	POS Web	Adult Senior Child	Membership Price List

2.7. SETTING UP PASS TYPE PRODUCTS

This functionality allows for Passes to be open ended or for a fixed date.

A Pass is a ticket for a venue that is purchased with both a specific usage date assigned and which could alternatively be activated at a date or time in the future. For example, a Pass could be purchased in March with the intention of visiting at some point during the summer. When the user decides which date, they can simply turn up and gain access to the venue as per the terms of their Pass. A Pass can be based on a number of different scenarios such as an Open Day Pass where you can visit any day within a set amount of time, a Day Pass where you can visit on a selected date or a Multiday Pass where you can visit multiple times in a set period of time.

For a Pass type product to be placed on sale the following Setup must have been completed before creating the Pass type Bookable Product, information on these can be found in Section 1 of this document:

- The Channels which the product is to be sold should have been created (See the Go CRM 2015 Infrastructure User Guide for information on Channels).
- Variant Types for the Pass product must have been created. For example different prices for Passes may exist for Adults, Juniors and Seniors.
- Variant Price Lists to enter the prices of the Passes must also have been created.
- Other Type Sales Plan to link the Channel Price List must have been set up. This Sales Plan should also be linked to the Company Details within CRM. This Sales Plan will be used for all Stock, Scheduled, Auto- Scheduled and Pass type products
- Channel Price Lists to control when the Pass is shown on Sale should also be linked to the Other type Sales Plan

Please note that Pass settings can now be used in conjunction with the settings of a Membership product. For examples of these and how they are set up please see the Pass and Membership Settings Scenarios section of this document.

Additional functionality can be added once the Membership product has been created. Information on this functionality can be found in the following sections:

- Delayed Purchase
- Upselling Products (Additional Products)
- Cross Selling Products

CREATING THE PASS TYPE BOOKABLE PRODUCT

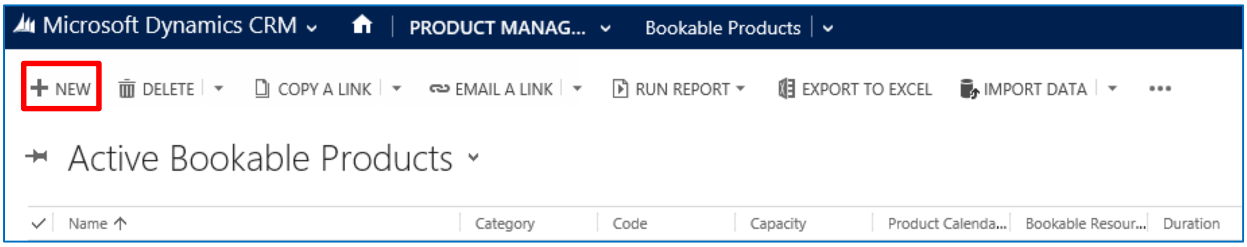
The Bookable Product entity is used to represent products which are sold, for example the type of Pass. For Pass products which you are selling through the system you must create a **Pass** type Bookable Product.

To create the Pass Bookable Product:

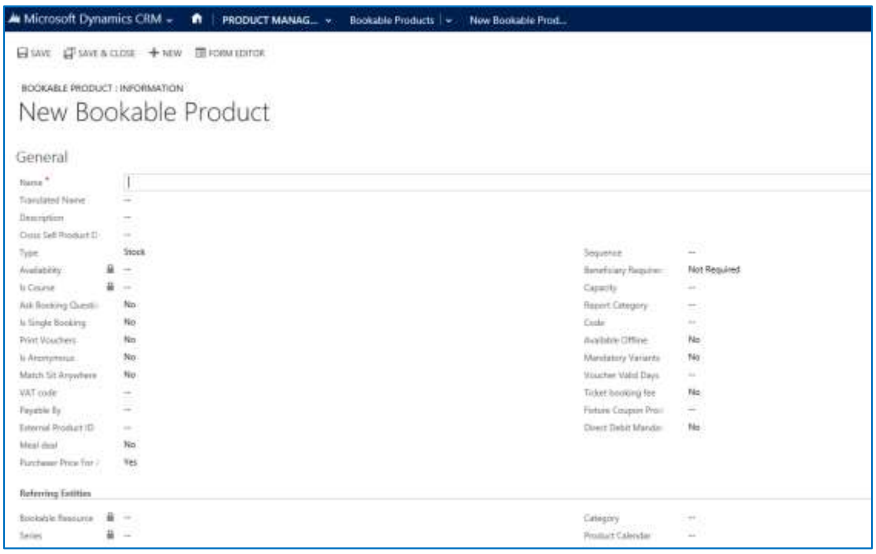
a) Select or hover over the **Microsoft Dynamics CRM** tab before scrolling across the drop down list of the navigation bar and selecting **Product Management**.

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 the Bookable Product form that have not been described below do not need to be completed/changed.

General:

- **Name.** Enter a name for the product. The name will be visible to customers, and should therefore reflect the nature of the product, for example; Day Pass.
- **Translated Name.** Used for translated implementations. For more information see the set up for Multi Lingual using the Translation Field
- **Description.** Enter a description of the product. The Description field can be set as a translatable string if desired (if used in the Web UI). See the Set up for Multi Lingual using the Translation and Description Field for further information.
- **Type.** Use the drop-down list to select the type of product. For Passes select **Pass** from the list of available types.
- **Payable By.** If the product can be paid for using Direct Debit use the Lookup to select the Direct Debit payment method.
- **VAT Code.** If applicable, select the VAT Code that applies to the product.
- **External Product ID.** This flag may be used for access control purposes.
- **Sequence.** Enter a sequence number for the product. The sequence number is used to determine the order in which products are displayed in the POS and Web channels.
- **Beneficiary Requirement.** Use the drop-down list to select if a customer's name is required when the product is purchased. Select from the following options:
    i. **Not Required.** The customer will not be asked for their name and contact details.
    ii. **Requested.** The customer will be asked for their name and contact details, but can skip this option if they do not wish to provide their details.
    iii. **Required.** The customer must provide their name and contact details. This option should be selected when setting up a season ticket or membership product.
- **Available Offline.** Select **Yes** if the bookable product is to be available for purchase through the offline POS. This option cannot be used for products that require capacity to be monitored.

Referring Entities:

- **Category.** Use the Look Up dialog to select the product category. The category is used to group products, for example into memberships, food, passes etc.

- **Product Calendar.** Select the product calendar that will manage the on/off sale and peak times for the Bookable Product. For more information on Product Calendars see [Product Calendars](#).

Membership and Pass setting:

- **Collect Start Date.** If the date when the Pass is validated from can be selected to a specific day and not just the day that the Pass is being sold, select **Yes.** This will allow a date picker to be displayed in the relevant Channels. If the date of the validation of the pass cannot be selected for a specific day, select **No.** The pass will only be valid on (single use) or from (multi use) the date that is picked.

Time Settings:

- **Update Start On First Use.** Select **Yes** if the start date of the Pass product will update on first use. Select **No** if the start date of the Pass product will not update on first use.

Delay Purchase:

- **Delay Duration.** If you wish to delay the Pass product from being available for a certain amount of time, enter the unit number here.

- **Delay Duration Unit.** Used in conjunction with the Delay Duration select the delay Duration Unit from the choice of Hours, Days, Week or Months. For example, if the Delay Duration is set to 1 and the Delay Duration Unit is set to Days, this setting would prevent a Pass being bought for 1 day.

Pass Settings:

- **Number of Uses.** Enter the number of times that a Pass can be used to gain access to a Venue. For example if the pass can be used only once, enter 1. Contrastingly, if the Pass can be used on multiple occasions, enter the number that represents this amount.

- **Number of Days Before Entry Allowed.** Enter the number of days after a Pass has been purchased which it must be activated by.

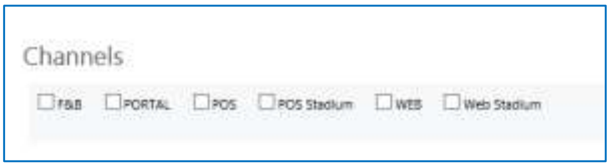
- **Number of Days Before Entry Rejected.** Enter the number of days after the purchase that the Pass is valid for. For example, if the Pass must be used within one year of being purchased, enter 365. After this amount of days, entry will be rejected via the Pass.

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

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

   i. Scroll down to the **Channels** section of the Bookable Product form

   ii. The Channels which have been set up during the configuration of your system will be listed. Select the checkbox alongside each Channel through which the product will be sold.

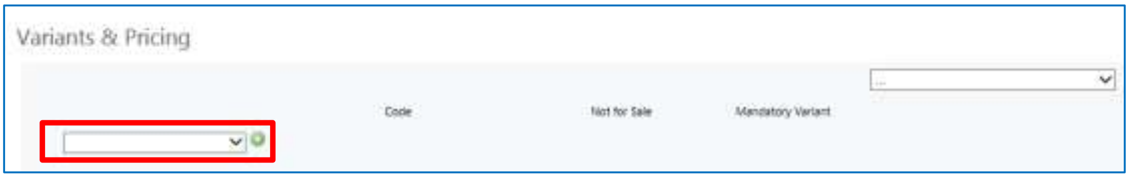


iii. Select **Save** on the ribbon.

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

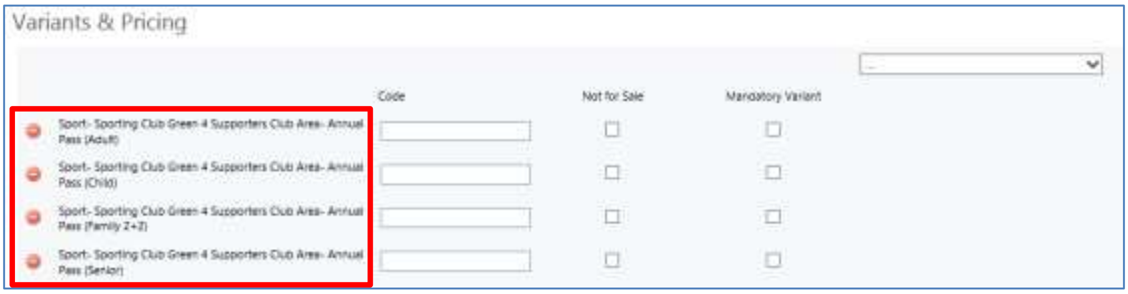
v. Scroll down to the **Variants & Pricing** section of the Bookable Product form.

vi. 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 be displayed in the relevant categories.



vii. Select the green cross alongside the Variant name to add a new Variant.

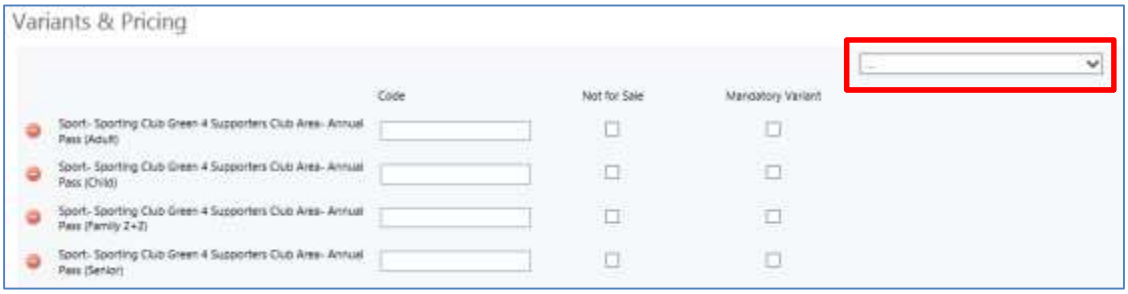
viii. Repeat until all variants are listed. If you need to remove a variant, click the red minus sign alongside the variant.



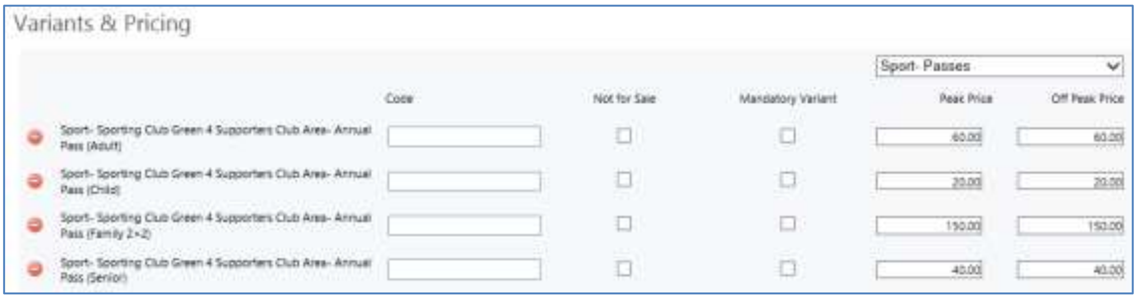
Note. Once a variant is sold it can then not be removed from the Variant and Pricing list. Therefore ensure the correct variants are set up for your product before you begin to sell them.

h) Next, the price of the product must be entered, to do this:

iv. Select the relevant **Variant Price List** from the drop down at the right hand side of the Variants & Pricing section (highlighted below).



v. Peak Price and Off Peak Price fields will appear upon 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.



vi. Repeat this process for each Variant Price List used to manage the pricing of the selected product.

i) Once 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 products should appear for sale in the selected Channels.

PASS TYPE PRODUCTS ON-SALE CHECKLIST

The following checklist can be used to ensure that you have completed all of the tasks required to place a Pass on sale:

Task	Completed?	Comments
Created a Sales Plan type Other		A Sales Plan type of Other should have been created and linked to the Company Details form under CRM. Only one Sales Plan type of Other needs to be created within the system.
Created a Channel Price List		The Channel Price List should be linked to the Sales Plan type Other The Channel price list should link the Channels to the Variant Price List Ensure the Channel Price List on sale dates are valid. For each Channel - Variant Price List combination a new Channel Price List must be created.
Create a Pass type Bookable Product		Ensure the Type of Bookable Product selected is Pass. Depending upon the type of Pass that is being created complete the relevant Pass and/or Membership setting. Examples can be seen in the section Pass and Membership Settings scenarios. Add a Category to the Bookable Product form
Assigned Channels to the Bookable Product		Ensure the relevant Channel check boxes are ticked.
Assigned Variants to the Bookable Product		Ensure the Variants are listed.
Assigned prices to the Bookable Product		Prices should be added to an active Variant Price List.

EXAMPLES - PASS AND MEMBERSHIP SETTINGS SCENARIOS

The Pass product settings can now be used in conjunction with the settings of a Membership product. In the tables below are examples of different Pass and Membership products that can be created. The tables give a brief definition and example of each Pass or Membership type, whilst also showing what Membership and Pass fields in the Bookable Product form must be completed for such a product type to be created.

Note: The tables below only show the fields related to the Pass and Membership products. They do not show mandatory fields from the Bookable Product form such as Name or Category that need to be completed. Channels as well as Variants and Pricing will also need adding to the Bookable Product form.

PASS PRODUCT SCENARIOS:

	Open Pass	Dated Day Pass	Multiday Pass	Multiday Pass- Disney Model
Detail of the type of Pass	The Pass can be scanned once and has a set amount of time to be used from the date that it is purchased.	The Pass begins on a selected date.	The Pass can be used on multiple occasions in a set period of time.	The Pass can be used on multiple occasions in a set amount of time but the first scan of the Pass must be made within a selected number of days.
Example	A Pass can be used once and has 1 year from the purchase date to be used.	The date of when the Pass can start to be used is able to be selected.	Can make 3 visits using the Pass in a 1 year period.	Can make 3 visits in a week using the Pass but the first scan of the Pass must be made within 30 days of it being purchased.
Bookable Product Form Settings using the above examples				
Type	Pass	Pass	Pass	Pass
Collect start date	No	Yes	No	No
Is Membership	No	No	No	No
Number of Days to Activate (Membership field)	Leave blank	Leave blank	Leave blank	30
Number of Uses	1	1	3	3

Number of Days Before Entry Rejected	365	Leave blank	365	7
Number of Days Before Entry Allowed	Leave blank	Leave blank	Leave Blank	Leave Blank

MEMBERSHIP PRODUCT SCENARIOS:

	Annual Membership 1	Annual Membership 2	Membership	Annual Membership as a gift
Details of the type of Membership	Unlimited visits for an annual period with the Membership beginning on the date that it is purchased	Unlimited visits for an annual period with the start date being selected.	Unlimited visits until a set date.	Unlimited entry for an annual period with the Membership beginning upon the first scan. The gift receiver has a set amount of days to activate the Membership
Example	Unlimited visits using the Membership in a 1 year period from the purchase date	Unlimited visits using the Membership in a 1 year period with the start of the Membership being selectable.	Unlimited visits using the Membership until a set date.	Unlimited visits using the Membership which will begin upon the first time that it is scanned. The Membership must be activated within 30 days of purchase.
Bookable Product Form Settings using the above examples				
Type	Pass	Pass	Pass	Pass
Collect start date	No	Yes	No	No
Is membership	Yes	Yes	Yes	Yes
Membership Duration	1	1	Leave blank	1
Membership Duration Unit	Year	Year	Leave blank	Year

Membership End Day	Leave blank	Leave blank	Enter end day e.g. 31	Leave blank
Membership End Month	Leave blank	Leave blank	Enter the end month e.g. July	Leave blank
Number of Days to Activate	Leave blank	Leave blank	Leave blank	Enter number of days to activate. E.g. 30
Update Start On First Use	No	No	No	Yes

3. FUNCTIONALITY AND USAGE

The Functionality and Usage section of this document gives instruction on setting up and using various functionality that is related to the products shown in the Product Configuration section of this document. The functionality listed below does not apply to all product types but the products that the functionality can use will be highlighted within this section. The following diagram demonstrates the functionality that can be set up, as well as appropriate instruction.

1. DELAYED PURCHASE	2. UPSELLING PRODUCTS (ADDITIONAL PRODUCTS)	3. RESERVE CAPACITY	4. NEGATIVE RESERVE CAPACITY
5. MEMBERSHIP PHOTO	6. MEMBERSHIP NUMBER	7. ENTITLEMENTS	8. CROSS SELLING PRODUCTS
9. SEASON TICKET BUYBACKS	10. ADDING A FIXTURE TO SEASON TICKET CARDS	11. PLACING A CUSTOMER ON HOLD	12. RESERVATIONS
13. ALLOWING TICKET MOVES/UPGRADES	14. PRINTING INDIVIDUAL FIXTURE TICKETS FOR A SERIES	15. ALLOWING PARTIAL SERIES SALES	16. Priority Providers

3.1. DELAYED PURCHASE

This functionality prevents products from being purchased within a predefined period. The Bookable Product type this functionality relates to are:

- Scheduled type Bookable Products.
- Auto Scheduled type Bookable Products.
- Stock type Bookable Products
- Pass type Bookable Products

The functionality has been developed to encourage revenue spend and also revenue protection, for example encouraging customers to pre-purchase a product on the web at a cheaper price, before it is available to purchase anywhere else at an increased standard price.

Encouraging pre-purchase also helps with revenue protection, for example in Ten Pin Bowling, encouraging people to pre-purchase will help reduce the negative effect of a Sunny day on people attending indoor leisure activities.

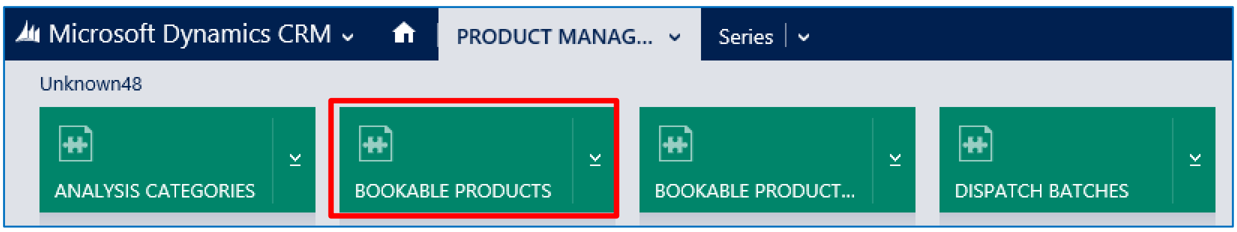
By setting the Delayed Purchase functionality although the product will still be displayed on its selected Channels it cannot be purchased until the Delayed Purchase time has passed. If an attempt to purchase the product is made within the Delayed Purchase period, a message will appear, showing when the product can be purchased on the relevant Channel e.g. POS/Web.

If the settings below are not set, then no exclusion will be implemented on the Bookable Product. To set up a period of exclusion it is necessary to make changes to the Bookable Product.

To enable the Delayed Purchase 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.

Select the Scheduled, Auto Scheduled, Stock or Pass type Bookable Product which the period of exclusion is to be set for.

a) In the opened Bookable Product form, find the **Delay Purchase** section, two fields appear in this section, enter the following:

- **Delay Duration.** Enter the number that will calculate the delay duration until the product can be used.
- **Delay Duration Unit.** From the drop down list select one of the following, depending on the period of time that the product will be delayed for:
    - Hours
    - Days
    - Weeks
    - Months

For example if the **Delay Duration** is entered as 2 and the **Delay Duration Unit** selected is Days than this will prevent the purchase of the product any time within the next two days.

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

3.2. UPSELLING PRODUCTS (ADDITIONAL PRODUCTS)

The Upselling Product functionality, also known as Additional Products makes it possible to present the user with a list of upsell products at the point when they either add a product to their shopping cart, or when they select to pay for their goods. For example you can upsell a Match Day Programme when a customer purchases a Match Ticket when a customer purchases Admission it could be possible to upsell a Map or Guide to the attraction.

The Upselling Products functionality is enabled for the following Bookable Product types:

- Fixture type Bookable Products
- Series type Bookable Products
- Stock type Bookable Products (Including Memberships)
- Auto Scheduled type Bookable Products
- Scheduled type Bookable Products
- Pass type Bookable Products

However, it must be noted that for each of the above product types, only Stock type products can added as the Additional Products to upsell.

The instructions below demonstrate how it is possible to set up an Upsell of a product. The process includes adding the Additional Product to the Bookable Product whilst ensuring the correct Channel settings are in place.

To set up the Upselling of a product, complete the following:

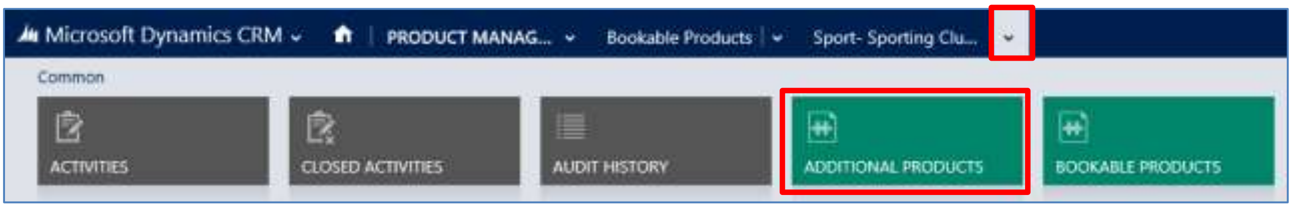
a) Select or hover over the **Microsoft Dynamics CRM** tab before scrolling across the drop down list of the navigation bar and selecting **Product Management**.

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.

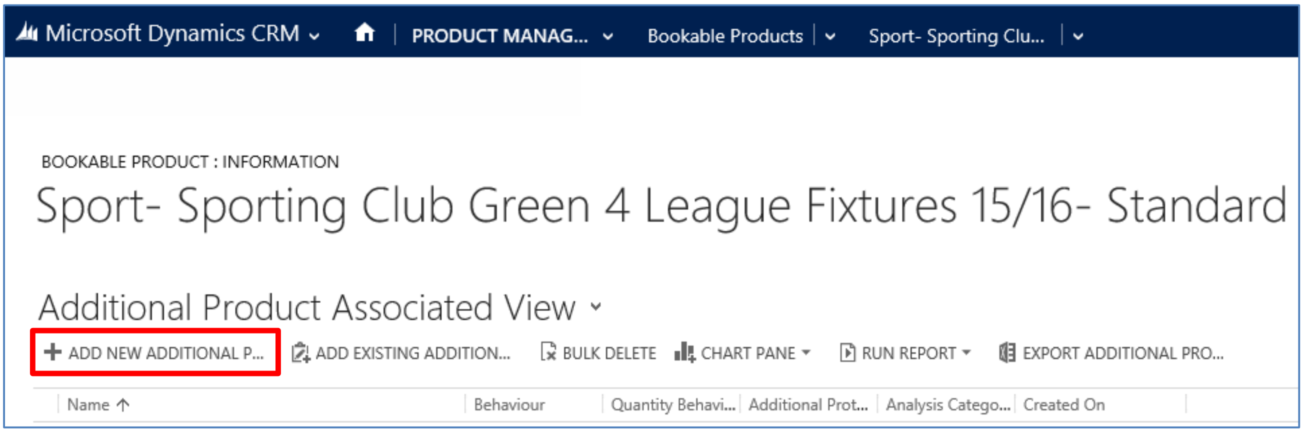
Select the Bookable Product that you wish to link an Upsell of a Product to, for example if upselling a Match Day Programme to a Match Ticket, firstly select the Match Ticket Bookable product. Please note these instructions will need to be repeated for each product you wish to upsell to.

d) The Bookable Product will be opened in the form view. Select the small arrow in the Navigation area next to the name of the product. From the drop down choose **Additional Products**.

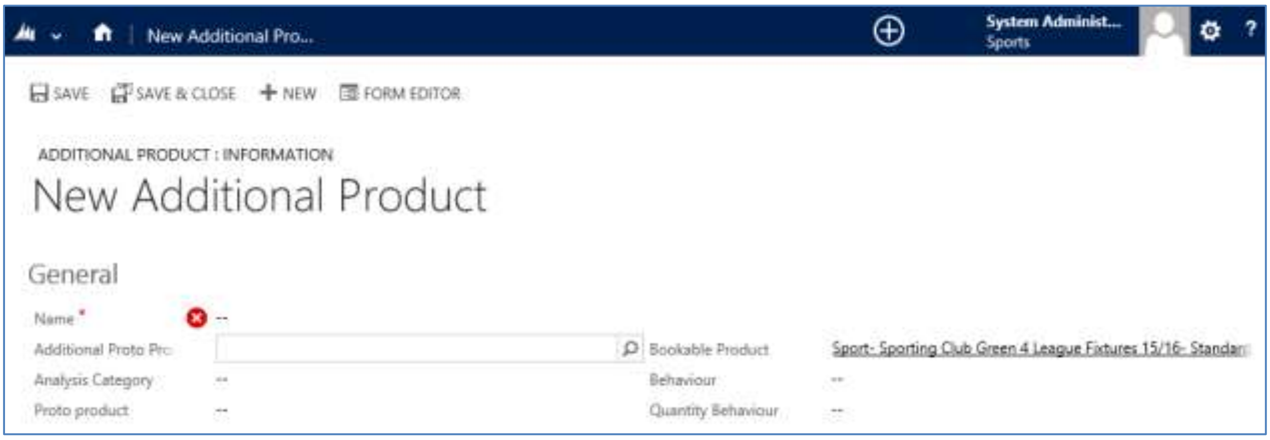


Note. Only Stock products can be added as additional products.

e) The Additional Product Associated View will be displayed. Select **Add New Additional Product** on the ribbon.



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



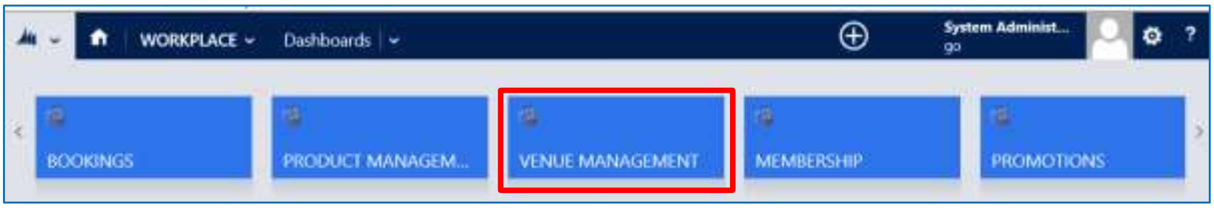
- **Name.** Enter a name for the Additional Product.
- **Additional Proto Product.** If applicable, use the Look Up Records dialog to select the product that you are upselling, for example a Match Day Programme. The product selected here must already have been created and must be a Stock type product.

- **Analysis Category.** If applicable, select an Analysis Category. When this option is entered the additional product would appear for each product that is part of the selected category.
- **Bookable Product.** The Bookable Product field will be pre-populated.
- **Behaviour.** Select when the additional product will be offered to the customer. Select from:
    - **After Add**. The upsell will be offered after adding the product to the shopping basket
    - **After Checkout**. The upsell will be offered at the checkout.
- **Proto Product.** If applicable, select a Proto Product. This allows you to link an Additional Product to a particular Product Variant.
- **Quantity Behaviour.** Enter the number of upsell products that will be offered. Select from:
    - **Per Person**
    - **Per Unit**
    - **Per Booking**

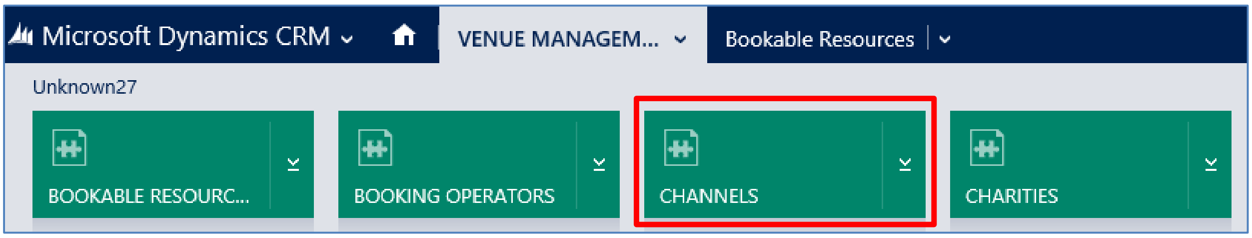
g) Once the details are complete, select **Save & Close** on the ribbon. The above process will need to be repeated for each product that an Additional Product is to be associated to.

h) Having set up the Additional Product it is necessary to select which Channels will allow the upselling of Additional Products. To set a Channel to allow the upsell of Additional Products do the following:

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

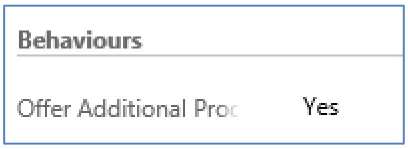


j) Select the **Venue Management** tab in the Navigation area and from the drop down choose **Channels.**



k) A list of Active Channels will be displayed. Open the Channel that it is possible to allow the Upselling of Additional Products on .e.g. POS or Web.

l) Under the Behaviours section of the Channel form, set the flag **Offer Additional Products** field to **Yes**.



m) Once the details are complete select the **Save** icon in the bottom right hand corner of the Channel form. Return to the Active Channel view and repeat the above steps for any other Channels that the Upselling of Additional Products is to take place.

Note. There does not always have to be a relationship between the Bookable Product and the Additional Product.

It is also possible to set an Additional Product up against an Analysis Category and Product Variant. This is done by opening up an Analysis Category form or Product Variant form before selecting the Additional Products in the navigation area. From the above instruction, Step F) onwards can be followed.

By adding an Additional Product to the Analysis Category this allows the product to be placed against a Category and therefore an Additional Product would appear for all products in that category.

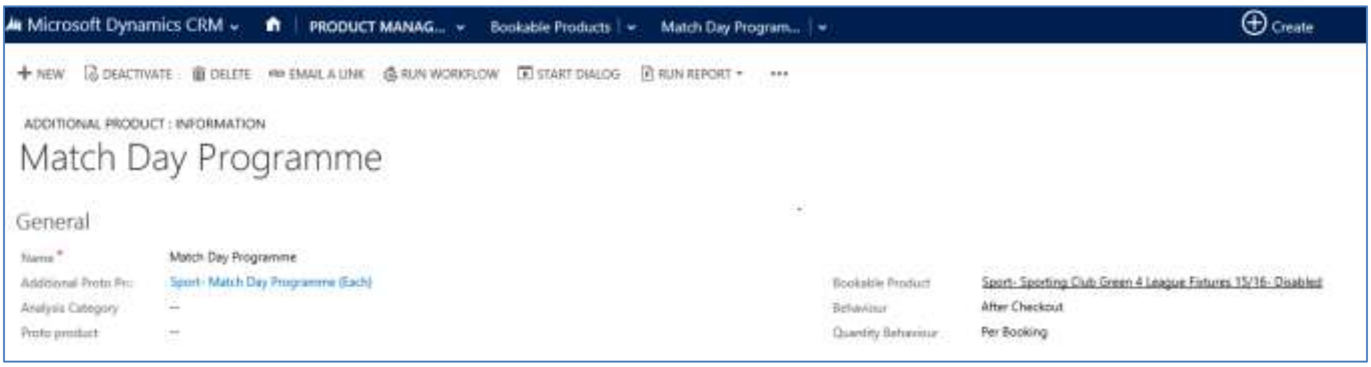
By adding an Additional Product to the Proto Product this will allow a link to be made to a particular Product Variant. For example, it would only show a Child Visitor Guide if a Child product is chosen.

Example of an Addition Product form created

An Additional Product form has been created as an example for this document. The Additional Product created allows a Match Day programme to be upsold when a Fixture ticket for a league game is added to the shopping basket. The table below shows the mandatory fields that have been completed in the Additional Product form.

Record Type	Name	Addition Proto Product	Bookable Product	Behaviour	Quantity Behaviour
Additional Product	Match Day Programme	Match Day Programme (Each)	Green 4 League Fixtures 15/16	After Checkout	Per Booking

Example of a completed Additional Product form within CRM 2015:



3.3. SETTING UP RESERVE CAPACITY (REDUCING THE CAPACITY)

This functionality makes it possible to Reserve Capacity and therefore **take out capacity** from the Bookable Resources that is linked to the Bookable Product without any bookings being taken.

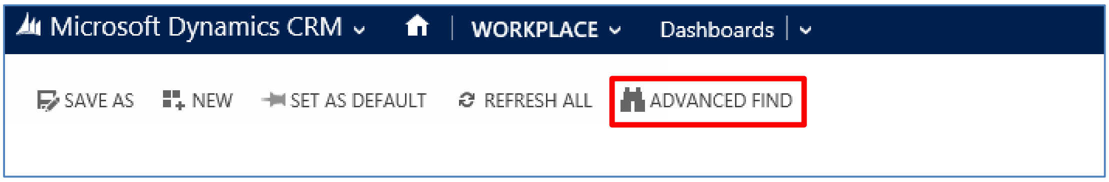
This functionality can only be used on the Bookable Resources that are linked to the following Bookable Product types:

- Auto Scheduled type Bookable Products
- Scheduled type Bookable Products

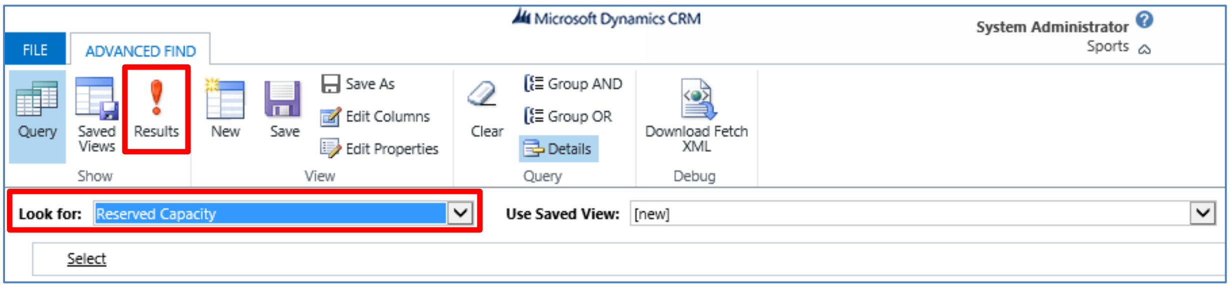
This functionality may be used if you would like to decrease the number of bookings from occurring due to factors such as a lack of staff or maintenance work being carried out on a set day. For example you may need to block half an ice rink as there is a shortage of instructors or prevent any bookings for one day due to the ice rink being refrozen.

To set a Reserved Capacity for a Bookable Resource, complete the following:

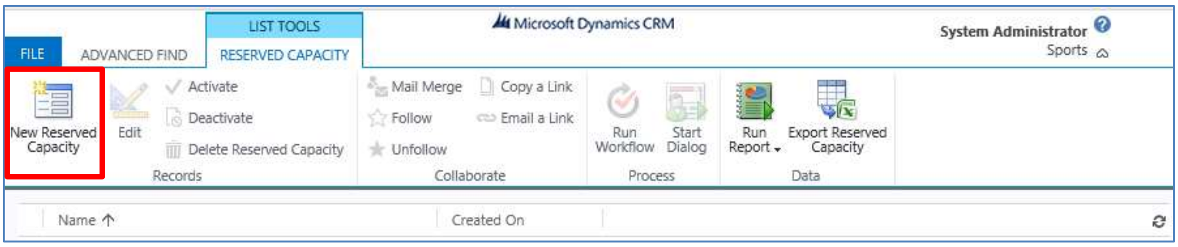
a) On the home screen of CRM 2015, select the **Advanced Find** button on the ribbon.



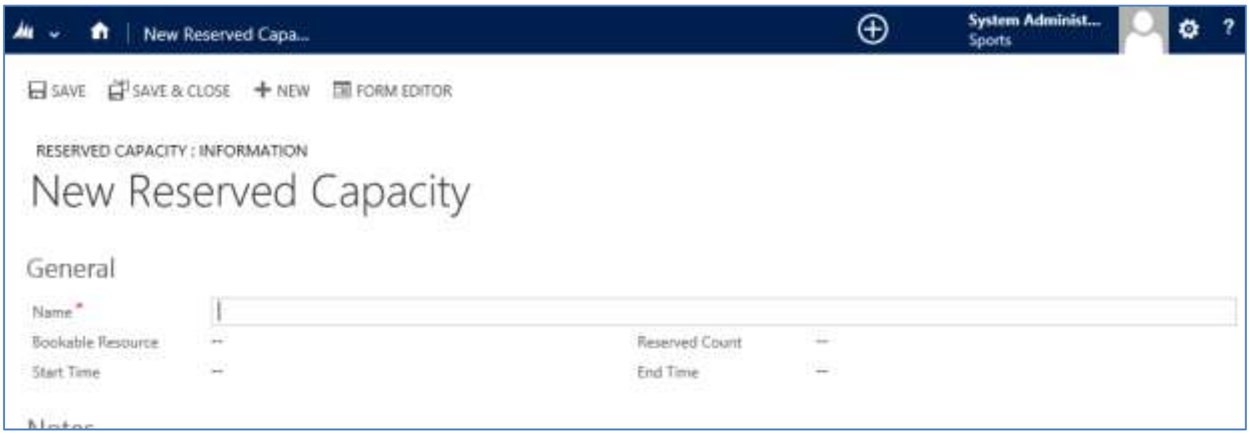
b) When the Advanced Find display appears in the **Look For** drop down menu select **Reserved Capacity** before selecting **Results** in the ribbon.



c) In the ribbon select **New Reserved Capacity**,



d) A new Reserved Capacity form will be displayed. Enter the following:



- **Name.** Enter a Name for the Reserved Capacity.
- **Bookable Resource.** Use the Lookup to find the Bookable Resource that the Reserved Capacity is related to.
- **Reserved Count.** Enter the number of bookings that are being reserved and cannot be brought, therefore this being the number that the capacity is being reduced by. For example if the Bookable Resource has a capacity of 200 and this capacity needs to be reduced to 150, then the number 50 should be entered into the Reserved Count field.
- **Start Time.** Enter the Start Time that the Reserved Capacity comes into force.
- **End Time.** Enter the End Time that the Reserved Capacity finishes.

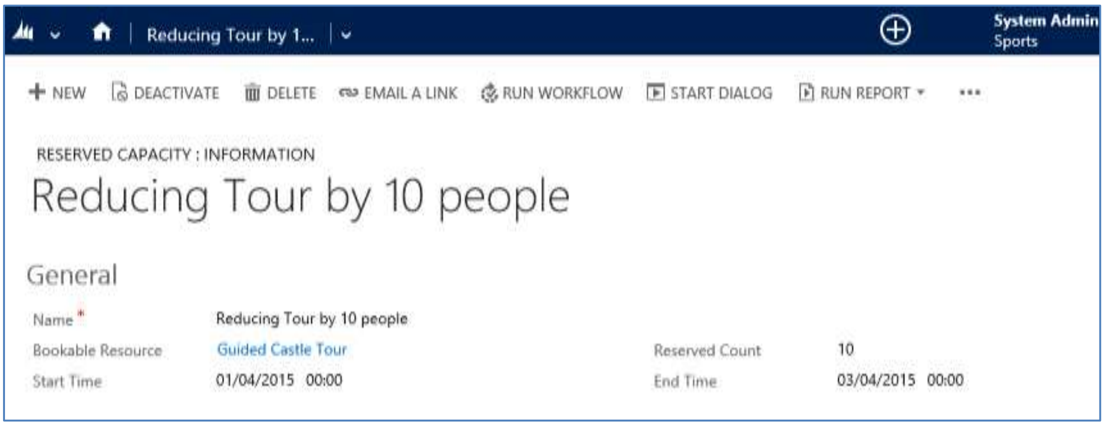
e) Select **Save and Close** in the ribbon.

Example of a Reserved Capacity created

A Reserved Capacity form has been created as an example for this document. The Reserved Capacity created allows the capacity of a tour to be reduced by 10 people for a two day period. The table below shows the mandatory fields that have been completed in the Reserved Capacity form.

Record Type	Name	Bookable Resource	Start Time	End Time	Reserved Count
Reserved Capacity	Reducing Tour by 10 People	Guided Castle Tour	01/04/2015	03/04/2015	10

Example of a completed Reserved Capacity form within CRM 2015:



3.4. SETTING UP NEGATIVE RESERVED CAPACITY (INCREASING THE CAPACITY)

This functionality makes it possible to temporarily **increase** the capacity of a Bookable Resource.

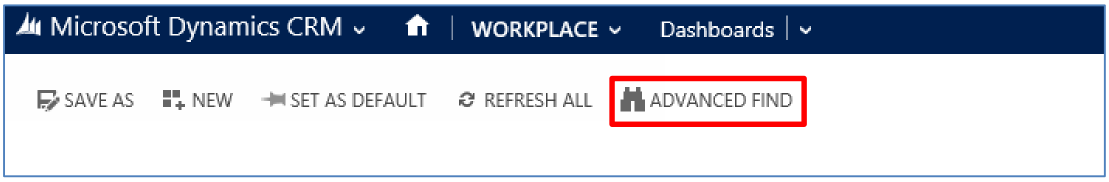
This functionality can only be used on the Bookable Resources that are linked to the following type of Bookable Products:

- Auto Scheduled type Bookable Products
- Scheduled type Bookable Products

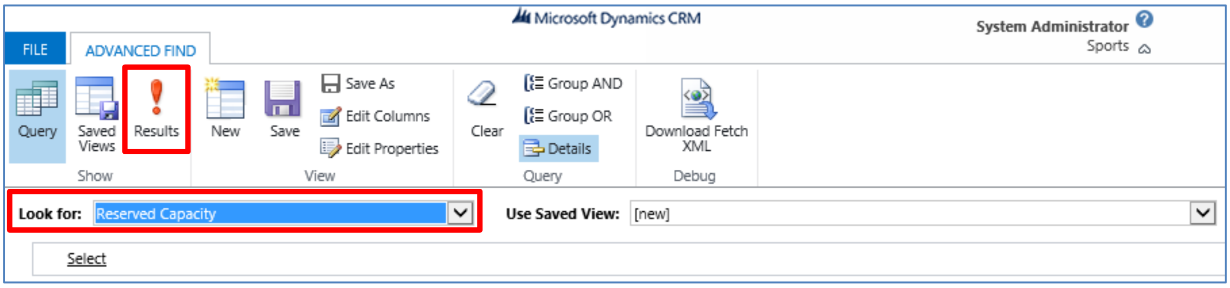
The process that is followed to create a Negative Reserved Capacity is very similar to that of creating a Reserved Capacity however to temporarily increase the capacity the **Reserved Count field** within the Reserved Capacity form must be set to a **negative number**.

To set a Negative Reserved Capacity, compete the following:

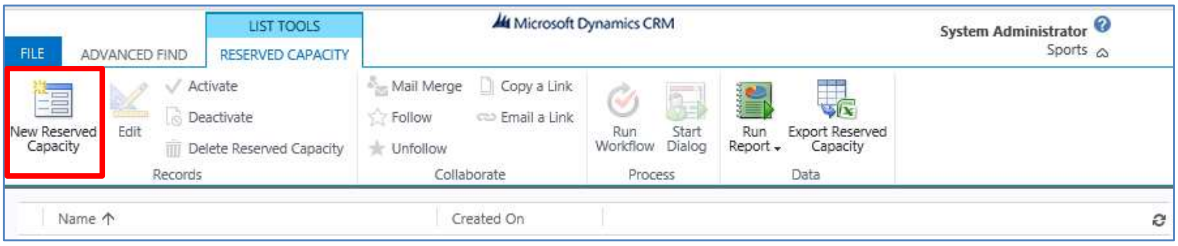
a) On the home screen of CRM 2015, select the **Advanced Find** button on the ribbon.



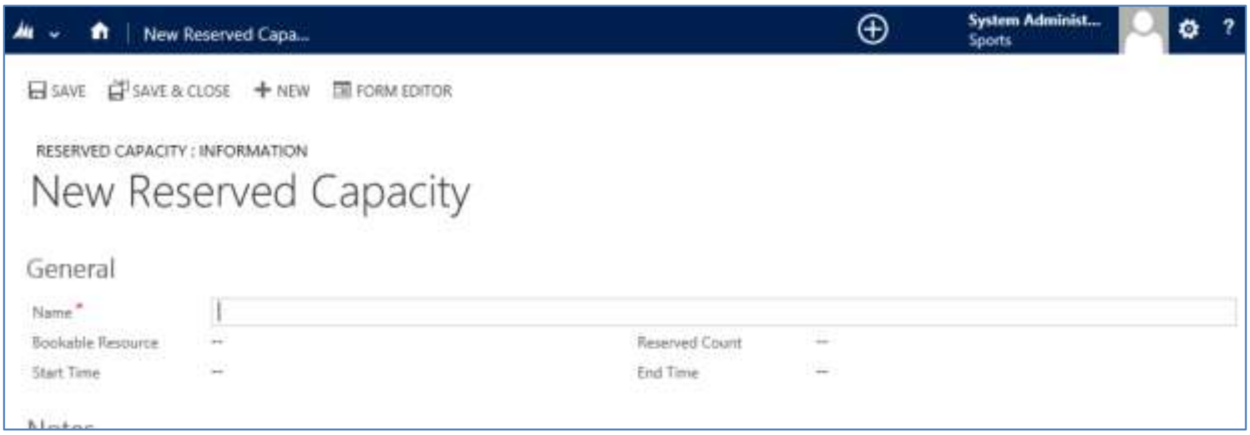
b) When the Advanced Find display appears in the **Look For** drop down menu select **Reserved Capacity** before selecting **Results** in the ribbon.



c) In the ribbon select **New Reserved Capacity**,



d) A new Reserved Capacity form will be displayed. Enter the following:



- **Name.** Enter a name for the Negative Reserved Capacity.
- **Bookable Resource.** Use the Lookup to find the Bookable Resource that the Negative Reserved Capacity is to be related to.
- **Reserved Count.** Set the Reserved Count to a **negative** number. This will mean that when bookings are taken for this resource it will be possible to over book the resource by up to the negative number amount entered in the Reserved Count. For example if you enter a reserved count of -10 for the use of a ski slope, this means the ski slope can be overbooked by up to 10 people.
- **Start Time.** Enter the Start Time that the Negative Reserved Capacity comes into force.
- **End Time.** Enter the End Time that the Negative Reserved Capacity finishes.

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

Example of a Reserved Capacity created

A Negative Reserved Capacity form has been created as an example for this document. The Negative Reserved Capacity created allows the capacity of a tour to be increased by 10 people for a two day period. The table below shows the mandatory fields that have been completed in the Reserved Capacity form.

Record Type	Name	Bookable Resource	Start Time	End Time	Reserved Count
Reserved Capacity	Increasing Tour by 10 People	Guided Castle Tour	01/04/2015	03/04/2015	-10

Example of a completed Negative Reserved Capacity form within CRM 2015:

3.5. CAPTURING A PHOTO FOR A MEMBERSHIP PRODUCT

This functionality allows for a photo to be captured when a Membership product is purchased on the POS. This will mean a photo is attached to the customer's details within the POS and can be printed onto a Membership card if applicable. This ensures that when a customer comes to use their Membership, their image can be recognised, potentially preventing misuse of the card.

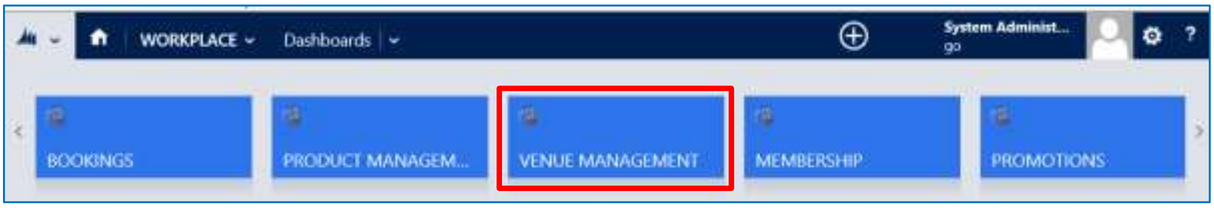
This functionality is relevant to the following product:

- Membership products

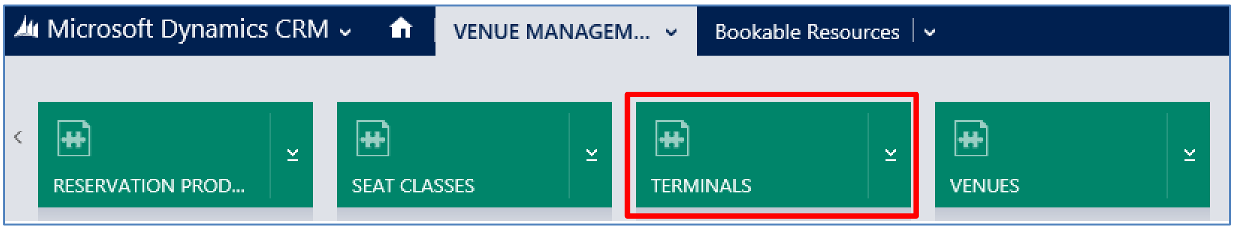
The process of capturing a photo includes setting up a camera to a Terminal and ensuring the Edit Beneficiaries dialog appears after payment for the product has been taken. This helps to make sure the Operator takes a photo.

To capture a photo for a Membership product complete the following instructions, beginning with the Terminal settings:

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) Choose the **Venue Management** tab in the navigation bar before scrolling across and selecting **Terminals.**



c) A list of all the Active Terminals will be displayed, open the terminal where a camera is to be linked to.

d) In the terminal form, the following fields must be completed under the Camera heading:

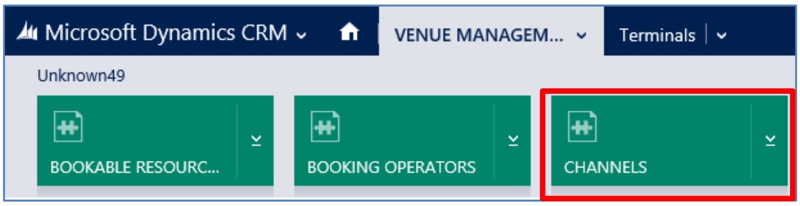
- **Camera Url.** Enter the Url of the camera that is to be linked to the terminal.
- **Camera Refresh Rate.** Enter the refresh rate for the attached camera. E.g. 10.00

e) Select the **Save** icon in the bottom right hand corner of Terminal form. Repeat the above step for each terminal which a camera is to be linked to.

For the Edit Beneficiaries dialog to appear after the payment is taken, ensuring the operator takes a membership photo, 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 **Venue Management**.

b) Choose the **Venue Management** tab in the navigation bar before scrolling across and selecting **Channels.**



c) A list of Active Channels will be displayed, open the appropriate Channel. e.g. POS.

d) In the Channel form under the General section, complete the following field:

- **Request Product User Info After Payment.** Select **Yes** if a camera is linked, this will display the Edit Beneficiaries dialog after payment, ensuring the operator takes a membership photo. Select **No** if the Edit Beneficiaries dialog is not required after payment.

e) Select the **Save** icon in the bottom right corner of the Channel form.

3.6. MEMBERSHIP NUMBER SET UP

This functionality allows for a Membership number to be either Auto generated by the system or manually entered or scanned when a Membership product is purchased. The latter for example would support instances when existing membership cards exist and the barcode numbers on these cards is to be used.

The instructions below demonstrate how to manually capture Membership Numbers and also how to Auto Generate Membership Numbers. Both of these are controlled by flags on the Channel.

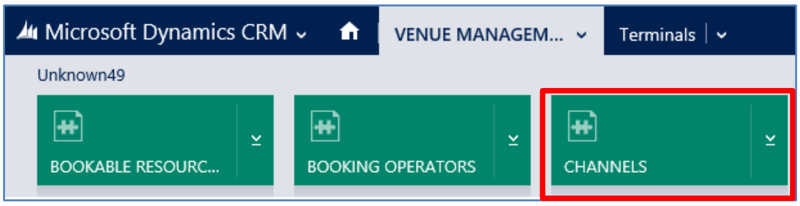
Manually captured Membership Numbers:

The set up explained below will enable the POS Operator to manually capture or scan a Membership Number against the Beneficiary in the POS.

To set up Membership Numbers to be manually captured, complete the following:

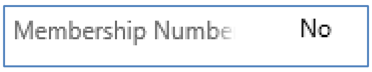
a) Select or hover over the **Microsoft Dynamics CRM** tab before scrolling across the drop down list of the navigation bar and selecting **Venue Management**.

b) Choose the **Venue Management** tab in the navigation bar before scrolling across and selecting **Channels.**



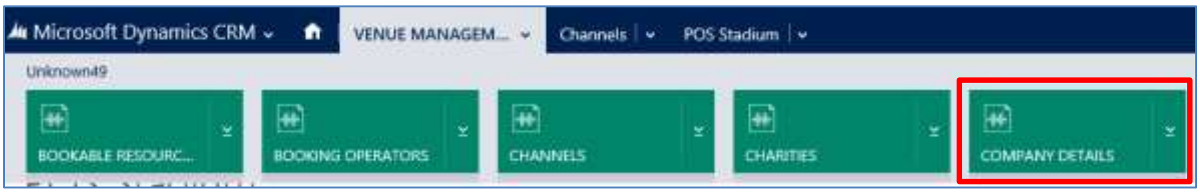
c) A list of Active Channels will be displayed, open the appropriate Channel. e.g. POS.

d) Ensure the **Membership Number Read Only** flag is selected to **No.**

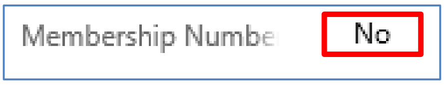


e) Select the **Save** icon in the bottom right hand corner of the Channel form.

f) Next, hover over or select the **Venue Management** tab in the Navigation bar. From the drop down list choose **Company Details.**



g) Open the Active Company Details form



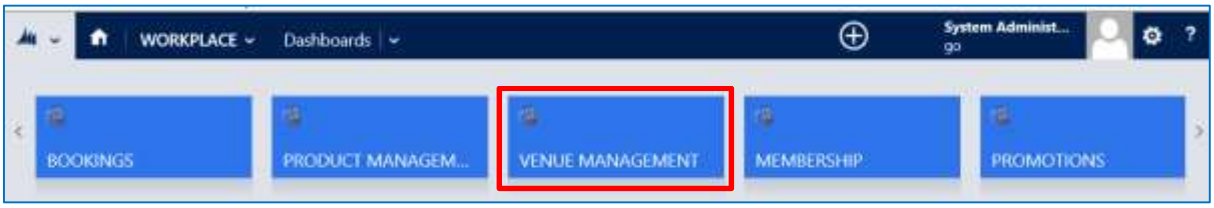
h) The field **Membership Number Auto Generated** will be defaulted to **Yes**, select **No** to enable the membership number to be captured manually.

i) Select the **Save** icon in the bottom right hand corner of the Company Details form.

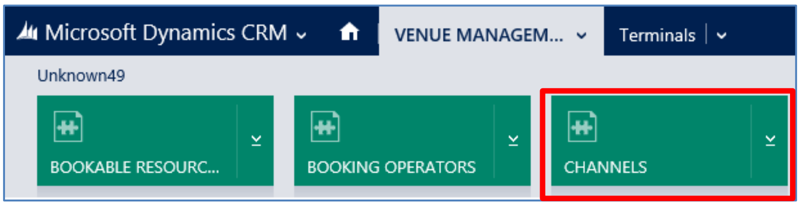
Auto Generated Membership Numbers

To auto generate membership numbers, 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 **Venue Management**.



b) Choose the **Venue Management** tab in the navigation bar before scrolling across and selecting **Channels.**

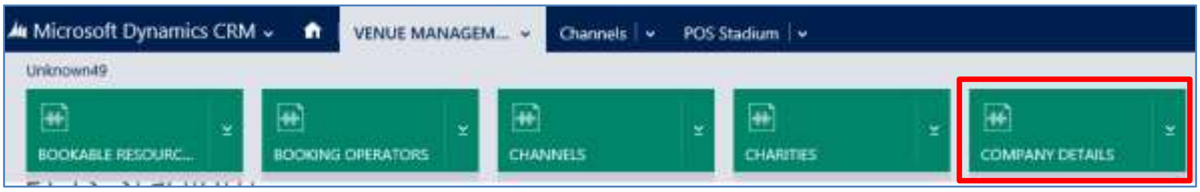


c) A list of Active Channels will be displayed, open the appropriate Channel. e.g. POS.

d) Ensure the **Membership Number Read Only** flag is selected to **Yes**

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

f) Next, hover over or select the **Venue Management** tab in the Navigation bar. From the drop down list choose **Company Details.**



g) Open the Active Company Details form

h) Ensure the field **Membership Number Auto Generated** is set to **Yes**

i) Select the **Save** icon in the bottom right hand corner of the Company Details form.

Note. If the system has been set up to auto generate membership numbers and the corresponding setting for the membership number field set to Read Only, the membership number cannot be captured, but will be auto populated on purchase of a membership type product in the POS.

3.7. ENTITLEMENTS

The Entitlements functionality allows customers, who are contained in a Marketing List, to obtain a preferential price for a product whilst also allowing the early access to a product due to being an Entitled user.

For example this may be for a cup Fixture where all Season Ticket holders are entitled to one ticket at a 20 per cent discounted rate.

Entitlements are added by creating a Channel Price List which has a Marketing List, a Max Quantity of the product that a customer is entitled to and has the relevant Discounts applied.

For information on setting up a new Channel Price List see Section 1.4 of this document; Channel Price Lists.

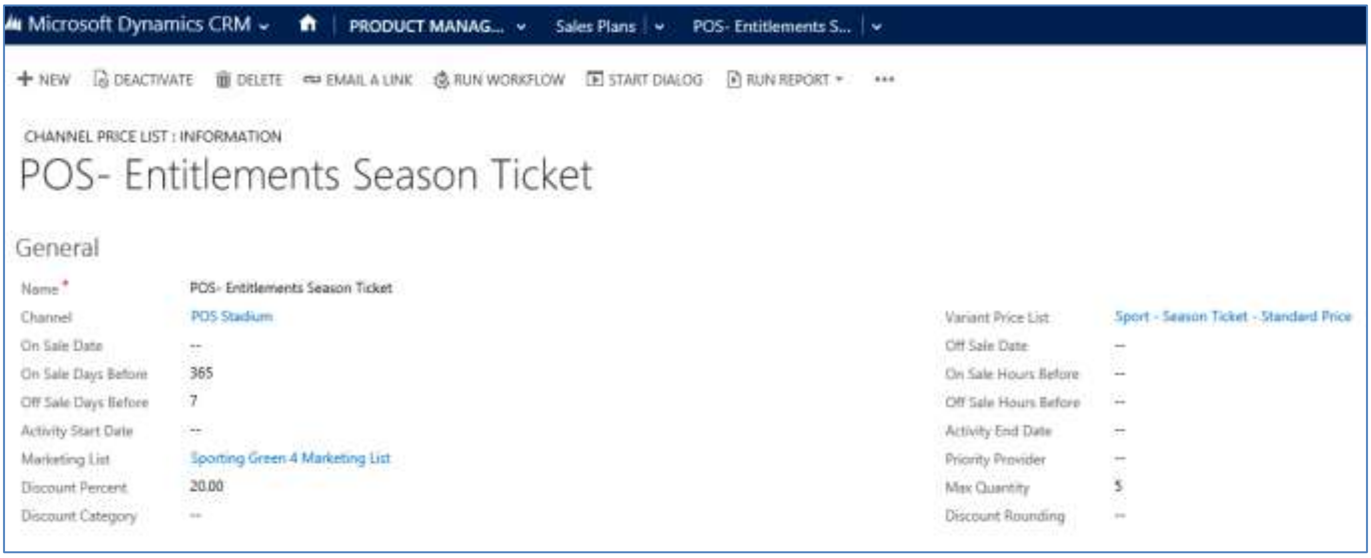
Entitlements can be applied to the following type of products:

- Fixture type products
- Series type products
- Stock type products
- Scheduled type products

The Entitlements drop down appears in the Channel when adding the beneficiary to the product.

An Entitlement can also be used by a customer who may be a friend or family member of the Entitled user. For example, a Season Ticket holder could be entitled to a number of tickets at a preferential rate. A friend or Family can then use the Entitled users' name which is selected when adding the Beneficiary to the product to gain the special rate.

ENTITLEMENTS AND THE CHANNEL PRICE LISTS



Channel Price Lists are central to the Entitlements functionality as these control who the Entitlements are for by adding a Marketing List, the quantity of the product that the entitled user has available to them via the Max Quantity field, the discount that is applied for entitled users via the Discount Percent field as well as the days the Entitlement is available for. Below is a more detailed explanation of each of these fields:

The quantity of the products that a customer is entitled to, for example the amount of match tickets, is defined by using the **Max Quantity** field of the **Channel Price List**. The maximum number of a product that a customer can purchase can be entered into this field.

The **Discount Percent** field can also be completed in the **Channel Price List**, this will discount any products using the Channel Price List by the entered percentage.

Used in conjunction with the **Discount Percent** field is the **Discount Rounding** and **Discount Category** fields, the **Discount Rounding** field can be completed to round the discount amount to the entered value when at the shopping cart. The **Discount Category** only applies if a discount value is specified, it can be completed to apply a discount to a certain category of products. If products from more than one category are to get the same discount, a new separate Channel Price List will need to be created for each category.

A **Marketing List** will also need to be added to a **Channel Price List**, this will mean that only those contacts in the Marketing List will be entitled to the details entered in this Channel Price List.

For example, a Marketing List may hold all Season Ticket holders or Members. Therefore the fields completed in the Channel Price List such as Max Quantity and a Discount Percent will only apply to this list of customers. Hence, a Channel Price List could be created which holds a Marketing List that contains all Season Ticket holders who are able to purchase a maximum of one ticket for a cup game (Max Quantity) and are allowed to receive a 20 percent discount (Discount Percent).

Note: It is still possible to enter a Marketing List in a Channel Price List without a Max Quantity.

If a Discount Percent is added to a Channel Price List with no Marketing List, the discount will apply to all products using the Channel Price List.

If a Channel Price List has a **Marketing List** or **Discount Percent** entered but no **Max Quantity** then the Bookable Products that are to be sold by using the Channel Price List should have the **Beneficiaries Requirement** field set to either **Required** or **Requested**.

If a Max Quantity has been entered into the Channel price List then Beneficiaries will always be required in the booking system, no matter what is set against the Bookable Product.

ENTITLEMENTS AND THE CHANNELS

In the Channel the field **Show Beneficiary Entitled User** can be set to either **Yes** or **No** within CRM. The following explains how this option controls what occurs on both the **POS** and **Web** Channel:

POS:-

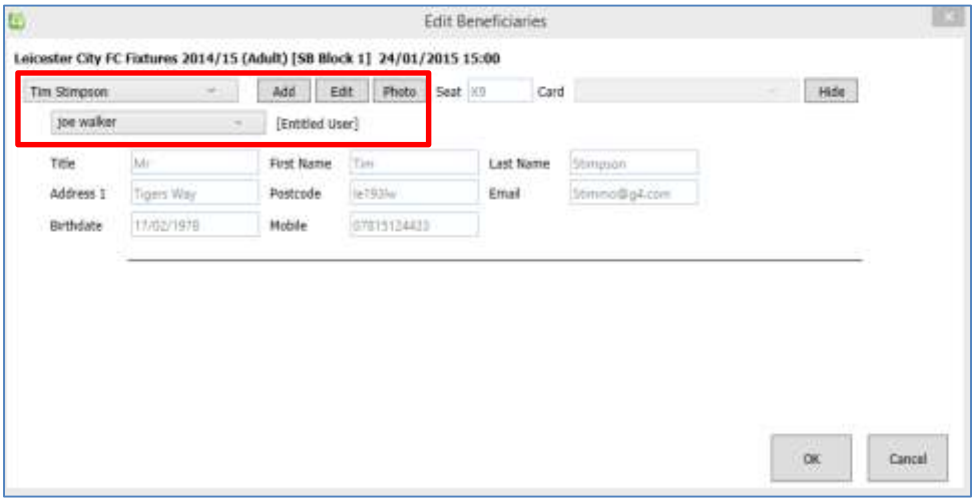
If in the POS Channel the field **Show Beneficiaries Entitled User** is set to **Yes**, then within the **Edit Beneficiaries** screen, the **Entitled User drop down** field will appear. If set to **No** then the Entitled User drop down will not be displayed on the Edit Beneficiaries screen.

In the below example the **Show Beneficiaries Entitled User** flag has been set to **Yes** in the POS Channel. This means the Entitled User drop down will appear in the Edit Beneficiaries screen of the POS.

In this case the **Entitled User** drop down is set to the user with the entitlements from the Marketing List (Such as Season Ticket Holder) that has been added to the Channel Price List.

The Beneficiaries drop down can be completed by any other user to obtain the preferential rate, such as the Entitled User himself or a friend or family member.

In the example below Joe Walker (Who is in a Season Ticket Holder Marketing List that is held in a valid Channel Price List) is the Entitled User, whereas Tim Stimpson (A Friend) has been added as the Beneficiary of the product, meaning Tim, in this example, can use Joe Walkers preferential price entitlement.



Note: Products with a Channel Price List that has a Marketing List added to it will only be shown on the POS if a purchaser is Added to the Order on the POS before selecting the product, given that they are part of the relevant Marketing List.

Web:-

If in the WEB channel the field **Show Beneficiaries Entitled User** is set to **Yes,** then when a customer logs into their account, if they are part of a Marketing List on a Channel Price List, where a discount has been applied, when the product that uses the Channel Price List is selected the discount will be applied on selection of the beneficiary.

3.8. CROSS SELLING PRODUCTS

Cross Selling functionality allows one product to be cross sold with another, offering the option to buy another product when the cross sell has been set up. This enables the end customer using the Web, or the POS operator to swap a product that is to be purchased with another product.

This is often used in the Leisure industry, for example it is common practice for a leisure attraction to try and convert day passes into annual passes. It can also be used to encourage a customer who may be purchasing a lower end product to instead buy a higher end product.

The Cross Selling functionality can be used on the following product types:

- Stock type Bookable Products (Including Memberships)
- Pass type Bookable Products
- Coupon type Bookable Products (see the Go CRM 2015 Promotions, Coupons and Vouchers User Guide for information)
- Voucher type Bookable Products (see the Go CRM 2015 Promotions, Coupons and Vouchers User Guide for information)

It must be noted that for the functionality to work correctly the Variants of the two products (Parent and Child product) that are to be swapped must be the same. The set up identified below also assumes that the products to be cross sold have already been created.

SETTING UP THE CROSS SELL PRODUCTS

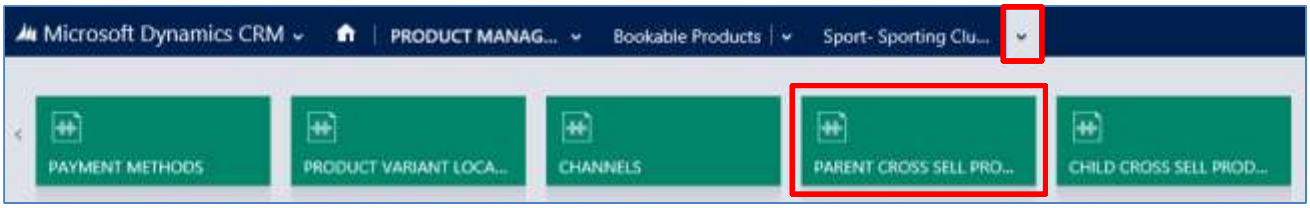
To set up a Cross Sell Product in CRM 2015, complete the following:

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**.

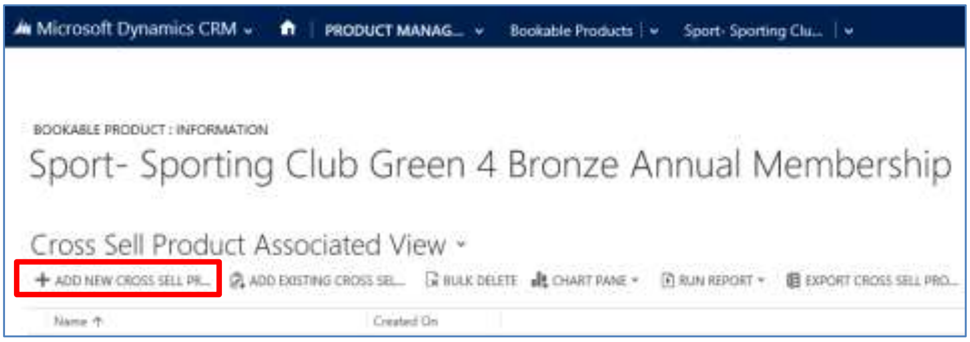
b) Next, in the Product Management area of CRM, select the **Product Management** tab before selecting **Bookable Products** from the drop down.

c) A list of the currently active Bookable Products will be displayed. Open the Bookable Product that is to act as the **Parent Cross Sell Product.** This will be the product, that when selected to be purchased, another product will subsequently be offered to be cross sold against.

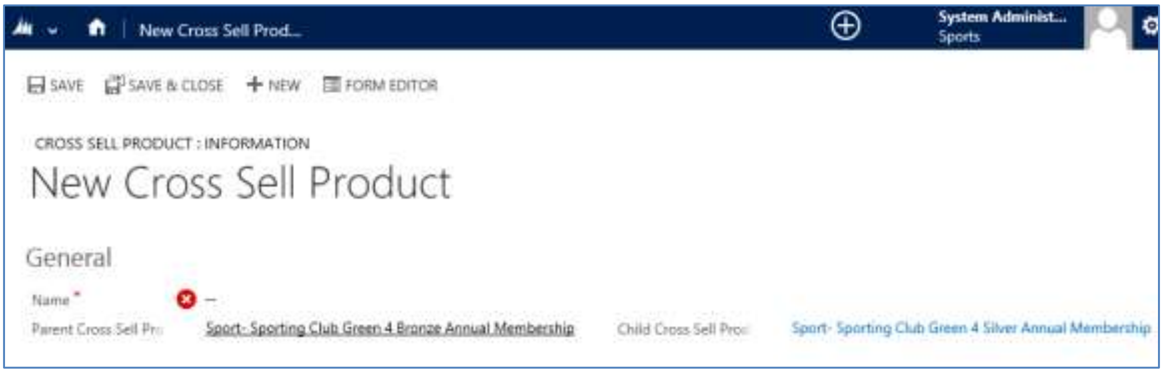
d) Within the Bookable Product form, select the small arow next to the name of the product. From the drop down, scroll across and select **Parent Cross Sell Product** tab.



e) The Cross Sell Product Associated View will be displayed, select **Add New Cross Sell Product** on the ribbon.



f) A Cross Sell Product form will be displayed. Enter the following:



- **Name.** Enter a name for the Cross Sell Product
- **Parent Cross Sell Product.** The Parent Cross Sell Product will already be displayed.
- **Child Cross Sell Product.** Use the Look Up to select an existing Bookable Product. The Child Cross Sell will be the product which is offered to be cross sold when the Parent Cross Sell is selected to be purchased on the relevant Channels.

Please note that the Parent Cross Sell Product and the Child Cross Sell Product must have the same Variants. Additionally, the Child Cross Sell Bookable Product chosen must be of the Type Stock, Coupon, Voucher or Pass.

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

A Child Cross Sell Product will now be linked to the Parent Product. Therefore whenever you try to sell the parent product in the relevant Channel you will see an option to buy another product as long as this has the same category of Variants and providing the Channel is set correctly.

It must also be noted that it is possible to add multiple Cross Sells to one product type.

Example of a Cross Sell Product form created

A Cross Sell Product form has been created as an example for this document. The Cross Sell created gives the option to swap a Bronze Membership to a Gold Membership. The table below shows the mandatory fields that have been completed in the Cross Sell Product form to demonstrate this.

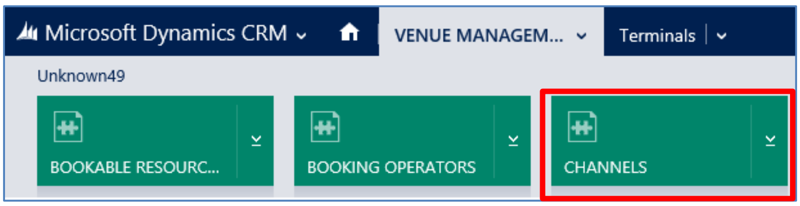
Record Type	Name	Parent Cross Sell Product	Child Cross Sell Product
Cross Sell Product	Membership-Bronze to Gold Cross Sell	Bronze Membership	Gold Membership

SETTING THE CHANNEL FOR CROSS SELLING

For the functionality to work, it is essential that the Cross Sell Product setting in the Channel is enabled. To do this complete the following:

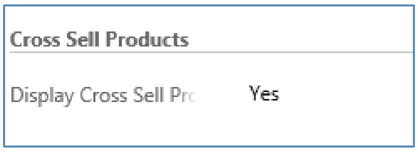
a) Select or hover over the **Microsoft Dynamics CRM** tab before scrolling across the drop down list of the navigation bar and selecting **Venue Management**.

b) Choose the **Venue Management** tab in the navigation bar before scrolling across and selecting **Channels.**



c) A list of Active Channels will be displayed. Open the appropriate Channel that the Cross Selling functionality is to work on and if this is to work on multiple Channels, the below steps will need repeating.

d) In the General section of the Channel form you will see the option to **Display Cross Sell Products**. Ensure that this box is set to **Yes.**



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

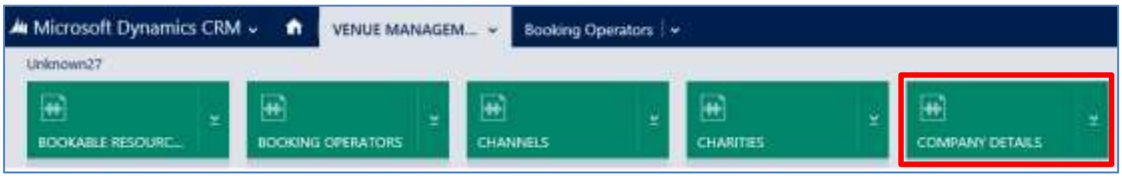
SETTING THE CROSS SELL HEADER AND SUB HEADER

It is possible to set a page header and page sub header which will be displayed when the option to Cross Sell appears on the POS or the Web.

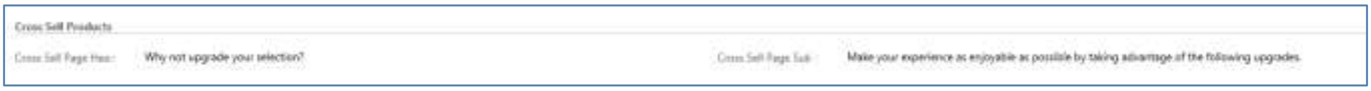
To set the Cross Sell Header and Sub Header, complete the following instructions:

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

b) Choose the **Venue Management** tab in the navigation bar before scrolling across and selecting **Company Details.**



c) Open the Company Details form and scroll down to the Cross Sell Products section. Complete the two fields:



- **Cross Sell Page Header.** Enter a title of the header that will be displayed on the POS and Web of the Cross Sell. In the above example this is; 'Why not upgrade your selection?'
- **Sell Page Sub Header.** Enter a Sub Header that will be displayed on the POS and Web of the cross sell. In the example above this is; 'Make your experience as enjoyable as possible by taking advantage of the following upgrades'

d) Select the Save icon in the bottom right hand corner of the Company Details form.

3.9. SETTING UP SEASON TICKET BUY-BACK FUNCTIONALITY IN CRM

This functionality allows for a Season Ticket holder to exchange their Season Ticket seat for loyalty points when they are unable to attend a fixture. The Season Ticket holder's seat can be immediately put on general sale or the organisation can subsequently manage the resale of the seat. Additionally this helps to maximise the seat revenues whilst rewarding the season ticket holder with loyalty points, which are also controlled by the organisation.

The organisation, such as the club, has the ability to manage when the offered up seats are to be shown for sale, enabling them to hold back offered seats from being released to general sale until all other seats have sold. The value of the loyalty points gained by the customer can also be controlled by the Club, allowing for variations based on the positioning of the seat within the stadium and the anticipated popularity of the fixture.

It is also possible for the offered up seat to be reclaimed by the customer (providing the seat has not already been sold) and additionally, if the offered up seats is not sold, it can be set so that the Season Ticket Holder still gains loyalty points but at a lower rate in comparison if the seat was sold.

It must be noted that the Season Ticket Buy-Back functionality does not support unseated/standing Season Tickets.

Additionally, for the functionality to be enabled fully, **Loyalty Transaction Sources** and **Loyalty Points rules** must have been created with a workflow ran against these. For instructions on how to do this see the Go CRM 2015 Loyalty User Guide.

To enable the Season Ticket Buy-back functionality, the following must be completed in CRM:

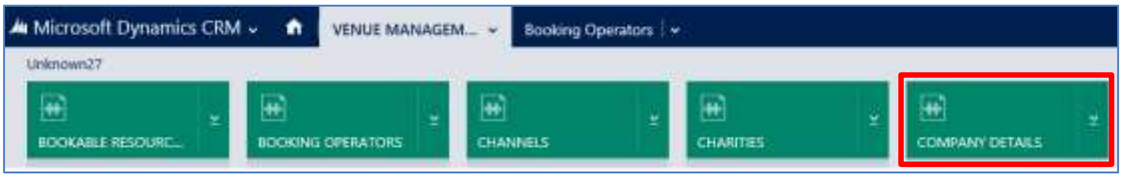
STEP 1. ENABLING BUY-BACK IN THE COMPANY DETAILS FORM

In the Company Details form the values that are entered into the **Default Setting for ticket buy-back** section will be used as the default for the corresponding data fields in the fixture entity. Therefore if buy-back is enabled and there is no change to the buy-back fields in the fixture form, the buy-back values entered into the Company Details form will be used.

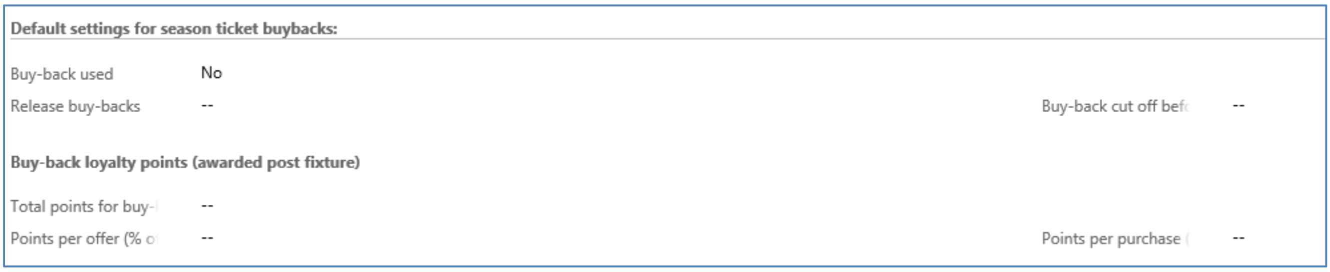
To enable the Buy-back functionality and to enter the default values complete the following:

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

b) Choose the **Venue Management** tab in the navigation bar before scrolling across and selecting **Company Details.**



c) Open the Company Details form and scroll down to the **Default settings for ticket buy-back** section as shown below.



d) Complete the following:

- **Buy-back used**. If the buy-back functionality is not to be used, select **No**. If the buy-back functionality is to be available on the POS and/or the Web ensure that **Yes** is selected.
- **Release buy-backs.** Select to **On demand**, if offered-up seats will not be shown for general sale immediately. Set to **Immediately** if offered-up seats are to be shown for general sale as soon as they are offered up.
- **Buy-back cut off before start time (hours)**. Enter the default time period in hours before the start of the fixture where buy-back changes are not allowed to be made. For example, if the cut off period is set to 12, then a fixture that has a start time of 15:00, buy-back changes could not be made for this fixture if the current time is greater than 03:00.

Buy-back loyalty points (awarded post fixture)

- **Total points for buy-back**. Enter the default total number of points that can be earned if an offered-up seat is purchased. (**Note.** This value can be up-lifted, if the block in which the seat is situated has a loyalty increment % set. Please see Step 4. Setting a Loyalty increment to the Block for an example of how this loyalty increment is applied.)
- **Points per offer (% of total points).** Enter the default percentage of the **Total points per buy-back** which are credited on to the loyalty account when a ticket is **offered-up for sale**. These points are credited once a fixture has been completed for all offered-up tickets.
- **Points per purchase (% of total points).** Enter the default percentage of the **Total points per buy-back** which are credited on to the loyalty account when an offered-up ticket has been **purchased**. These points are credited once a fixture has been completed for all offered-up tickets which have been purchased.

For more information showing how the loyalty points are calculated see examples of the points system in Step 3.

Note: For validation purposes the percentage value entered for the fields, **Percentage points for offer** and **Percentage points for purchase** must be between 0 to 100%. Additionally the % values entered in the **Points per offer** and **Points per purchase** fields together must add up to 100%

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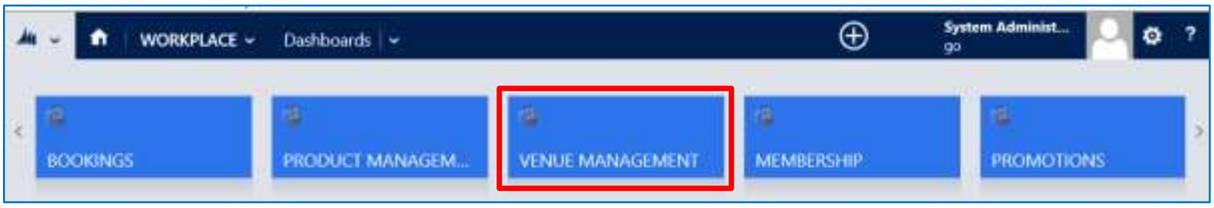
e) Select the **Save** icon in the bottom right hand corner of the Company Details form.

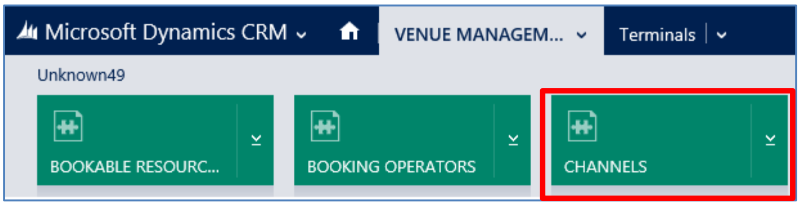
STEP 2. SETTING THE TICKET BUY-BACK UNOFFERED PERIOD ON THE CHANNEL

After a customer has offered up their ticket, it may be important to delay the offered ticket from appearing to be on general sale. It is possible to set up an un-offered time period if this is the case by simply entering a number (in minutes). Not until this number of minutes has passed after placing the ticket on offer will the ticket appear for general sale. To do this 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 **Venue Management**.



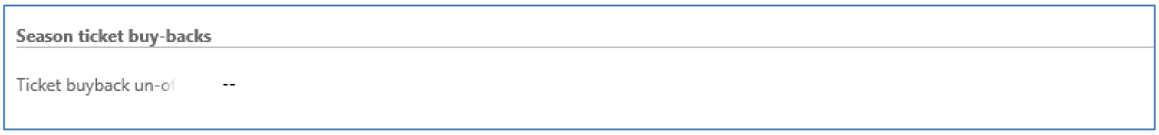
b) Choose the **Venue Management** tab in the navigation bar before scrolling across and selecting **Channels.**



c) A list of all the active Channels will be displayed.

d) Open the Channel that the un-offered period is to be set up on. If it is used on 2 channels, for example the Web and the POS, then these steps will need to be repeated for each channel.

e) Scroll down to the Season ticket buy-backs section of the channel form and complete the following:



- **Ticket buy-back un-offered period (Minutes).** Enter a number (in minutes) that will be used to delay the offered ticket from going onto general sale. For example if the un-offered period entered was 30 and a customer was to offer up a fixture on their season ticket at 14:30, providing the **Release buy-backs** flag is set to **Immediately** on the Customer Details form, the offered ticket would not appear for general sale until the current time is greater than 14:59.

f) Select the **Save** icon in the bottom right hand corner of the Channel form.

STEP 3. SETTING THE BUY-BACK ON THE FIXTURE

If the buy-back functionality is enabled, each Fixture will need to be set up with their own Season Ticket Buy-back options. As some Fixtures may be classed differently in their attractiveness, each Fixture will have different values regarding the loyalty points that are awarded for offering up a Season Ticket. For example if the Fixture is a high category game such as being set for a sell-out or against a local rival then the loyalty points gained for offering the season ticket for this Fixture will be more than a Fixture that is of a lower category and not set for a sell-out.

Note: If no buy-back option has been set against the fixture and the buy-back functionality is enabled, then the default values as described in [Step 1: Enabling Buy-back in the Company Details form](), will be used.

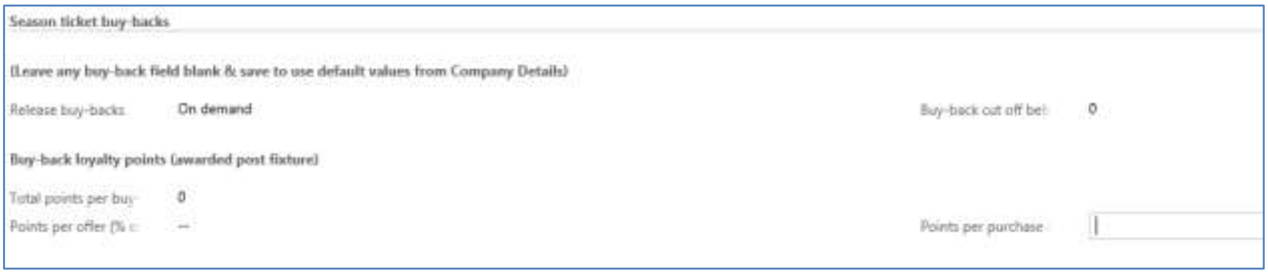
To set the buy-back fields for the Fixture, complete the following. Please note that these instructions will need to be repeated for each Fixture that is to have the buy-back functionality specifically set to it.

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 scrolling across the drop down list of the navigation bar and selecting **Fixtures.**

c) A list of any currently Active Fixtures will be displayed. Open the Fixture that the buy-back functionality is to be set up on. Please note for each Fixture the steps below must be repeated.

d) In the Fixture form, find the **Buy-back Details** section as is shown below. The following fields must be completed:



- **Release buy-backs**. Select to **On demand**, if offered-up seats for this Fixture will not be shown for general sale. Select to **Immediately** if offered-up seats for this Fixture are shown for general sale as soon as they are offered up.
- **Buy-back cut off before start time (hours)**. Enter the time period in hours before the start of the Fixture where buy-back changes are not allowed to be made. For example, if the cut off period is set to 12 for a Fixture that has a start time of 15:00, then buy-back changes cannot be made for this Fixture if the current time is greater than 03:00.

Note: If the requirement is to prevent a certain Fixture from being available for Buy-Back and therefore meaning a customer is unable to offer a ticket then this can be done by completing the **Buy-back cut off field before start time** field. If this is the case, a large number of hours such as 8784 (the number of hours in a leap year) should be entered into the field. This will then disable the Offer Ticket option in the POS and show it as the cut off being passed.

- **Total points per buy-back**. Enter the total number of points that can be earned for this fixture if the offered-up seat is purchased. (**Note.** This value can be up-lifted, if the block in which the seat is situated has a loyalty increment % set. Please see Step 4: Setting a Loyalty increment to the Block for an example of how this loyalty increment is applied.)
- **Points per offer (% of total points).** Enter a percentage of the **Total points per buy-back** which are credited on to the loyalty account when the ticket is **offered-up for sale**. These points are credited once the fixture has been completed for all offered-up tickets.
- **Points per purchase (% of total points).** Enter a percentage of the **Total points per buy-back** which are credited on to the loyalty account when the offered-up ticket has been **purchased**. These points are credited once the fixture has been completed for all offered-up tickets which have been purchased.

Note: For validation purposes the percentage value entered for the fields, **Percentage points for offer** and **Percentage points for purchase** must be between 0 to 100%

Additionally the % values entered in the **Points per offer** and **Points per purchase** fields together must add up to 100%

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

Example of the Buy-Back points system

The amount of loyalty points that a Season Ticket Holder can gain for offering-up their Season Ticket works by using a percentage of the Total points which can be gained when firstly offering up the season ticket and then when the Season Ticket Holder's seat is actually purchased.

For example, the **Total points per buy-back** may be set to 80. If the fixture is offered-up and the % of the **points per offer** was set to 40%, then the Season Ticket holder would gain 32 points. This is because 40% of 80 is 32. This would then leave a % of **Points per purchase,** this being 60% of the Total number of points. A Season Ticket Holder will gain these points when their offered-up seat has been purchased. Therefore in this example the Season Ticket holder would gain a further 48 points because 60% of 80 is 48.

The table below gives a number of examples of the points that may be gained for offering a ticket and purchasing a ticket in relation to differing Total points per buy-back, % of the points per offer and % of the points per purchase being set.

Total points per buy-back	**% of the** Points per offer	**% of the** Points per purchase	**Points gained if the ticket is offered**	**Points gained if the ticket is purchased**
100	25%	75%	25 points	75 points
80	40%	60%	32 points	48 points
60	30%	70%	18 points	42 points

50	80%	20%	40 points	10 points
30	10%	90%	3 points	27 points

STEP 4. SETTING A LOYALTY INCREMENT TO THE BLOCK

As different blocks in venues have may have variable views, with some seats positioned better than others, it is possible to set a Loyalty Increment to each block in the venue. This is an additional up-lift percentage which is applied to the **Total points per buy back** field in the fixture form. This can therefore be used to ensure that Season Ticket Holders who are offering up seats, situated in better blocks of a venue, can accrue more loyalty points than those offering up a seat with a poorer location within a venue.

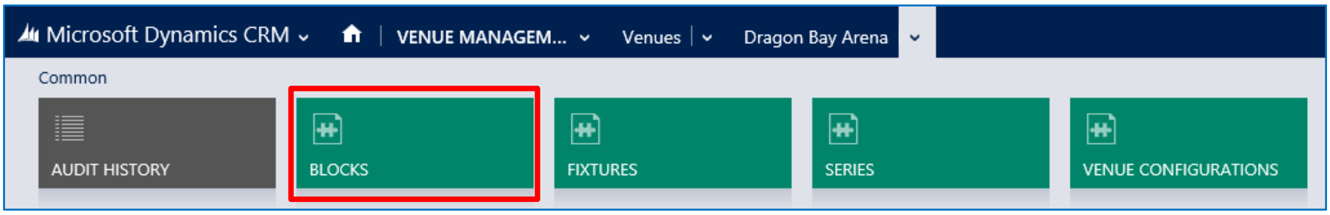
To set the Loyalty Increment for each Block:

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) Choose the **Venue Management** tab in the navigation bar before scrolling across and selecting **Venues.**

c) A list of Active Venues will be displayed. Open up the relevant **Venue.**

d) Within the Venues form, select the small arrow in the Navigation bar next to the name of the Venue. From the drop down, choose **Blocks**.



e) The Block Associated View will be displayed. Select the Block where the Loyalty Increment is to be entered. This will need to be repeated for each of the Blocks that a Loyalty Increment is to be entered into.

f) The Block form will be displayed. Complete the following field:

- **Loyalty increment (% of Total points per buy-back).** Enter the additional up-lift percentage which is associated to the **Total points per buy-back** field that is found within the fixture form.

  For example, an additional up-lift percentage of 10 may be inserted against a block. This means an extra 10% will be added against the Total points per buy-back that can be gained. Therefore if the Total points per buy-back for a Fixture is 100, with the percentage increment of 10% added the Total Points per buy-back will increase to 110.

g) Select the **Save** icon in the bottom right hand corner of the Block form. The steps above will need to be repeated for each block that is to have a Loyalty Increment entered.

Note. If when saving a Block the following error message appears**: Business Process Error. Block details cannot be change unless you are in the 'Block System Data Admin' security role**. A Block System Data Admin security role will need to be created and added to the User.

To do this complete the following:

Select **Advanced Find**, before choosing **Security Roles** from the Look For drop down list. Select **Results** and then choose New in the ribbon. In the **Role Name** field enter **Block System Data Admin** before clicking **Save and Close**.

Return to the **Advanced Find** area and select the Query tab before selecting **Users** from the Look for drop down. From here open up the main User and within the navigation bar select **Security Roles**. Select **Mange Roles** and place a tick in the Block System Data Admin role name. Select **Ok**.

The security role will now be linked to the user and the block can be saved.

SEASON TICKET BUY-BACK REPORT

There are two reports that can be generated to display offered seats. Firstly there is a report named **Season Ticket Buy-Back Report**, this gives a broad overview of the offered up seats. Additionally there is a report named **Season Ticket Buy Back Detailed Report**, this gives a more detailed overview of the offered seats including the customer who has offered the seat as well as the exact seat details. To access the Reports, complete the following:

a) Select the **Microsoft Dynamics CRM** tab in the Navigation bar before choosing Workplace from the drop down.

b) Choose **Workplace** and from the drop down select **Reports.**

c) A list of Available Reports will be displayed.

d) Select the relevant report named **Season Ticket Buy Back Report** or **Season Ticket Buy Back Detailed Report.**

e) Select **Run Report**, the chosen Report will be generated:

Season Ticket Buy Back Report:

Season Ticket Buy Back Report

Venue Name	Area Name	Block Name	Product	Offered	Resold	Not Sold	Resale Total
Leicester City vs Aston Villa		SB Block 1	Leicester City Season Ticket 2014/15 (Adult)	1	1	0	£20.00
			Total	**1**	**1**	**0**	**£20.00**
		SB Block 12	Leicester City Season Ticket 2014/15 (Adult)	1	0	1	
			Total	**1**	**0**	**1**	
			Total	**2**	**1**	**1**	**£20.00**
			Total	**2**	**1**	**1**	**£20.00**
Leicester City vs Chelsea		SB Block 1	Leicester City Season Ticket 2014/15 (Adult)	2	0	2	
			Total	**2**	**0**	**2**	
			Total	**2**	**0**	**2**	
			Total	**2**	**0**	**2**	

Season Ticket Buy Back Detailed Report:

Season Ticket Buy Back Detailed Report

Fixtures:
Modified On: Last X Days 30

Fixture	Area	Block	Season Ticket Holder	Series Product	Row	Seat	Status	Resale Price	Purchaser	Ticket Product
Leicester City vs Aston Villa		SB Block 1	jamie vardy (20)	Leicester City Season Ticket 2014/15 (Adult)	K	3	Sold	£20.00	Joseph Walker (18)	Leicester City FC Fixtures 2014/15 (Adult)
							Total	**£20.00**		
		SB Block 12	jamie vardy (20)	Leicester City Season Ticket 2014/15 (Adult)	A	7	On Offer			
							Total			
							Total	**£20.00**		
							Total	**£20.00**		
Leicester City vs Chelsea		SB Block 1	jamie vardy (20)	Leicester City Season Ticket 2014/15 (Adult)	K	3	Sold	£20.00	Joseph Walker (18)	Leicester City FC Fixtures 2014/15 (Adult)
			Joseph Walker (18)	Leicester City Season Ticket 2014/15 (Adult)	K	10	On Offer			
							Total	**£20.00**		
		SB Block 12	jamie vardy (20)	Leicester City Season Ticket 2014/15 (Adult)	A	7	Sold	£20.00	Jenny Murphy	Leicester City FC Fixtures 2014/15 (Adult)
							Total	**£20.00**		
							Total	**£40.00**		
							Total	**£40.00**		

SEASON TICKET BUY-BACK CHECKLIST

Task	Completed?	Comments
Enable the Buy-back functionality and set the default values in the Company Details form		On the Company Details form the field called Buy-back used must be selected to Yes for buy-back to be enabled. The Default Settings for buy-back must be entered. If buy-back is enabled and there is no change to the buy-back fields in the Fixture form, the buy-back values entered into the Company Details form will be used.
Set the Buy-Back un-offered period on the channels		If applicable, a time can be entered (in minutes) in the channel form under the field named Ticket buy-back unoffered period. This will delay the offered-up ticket being available for general sale for the specified time.
Set the Buy-back values for each fixture		In each Fixture form under the Season Ticket buy-back section, the values regarding the loyalty points that are offered for offering-up a Season Ticket must be entered. The values must be entered for each Fixture. Note- If no values are entered but buy-back is enabled, the default values entered in the Company Details form will be used.
Set a Loyalty Increment to each block		In each Block form under the Season Ticket buy-back section, the Loyalty Increment value can be entered. The Loyalty Increment value will differ depending on the view for the Block. The value should be entered for each Block

3.10. ADDING FIXTURES TO SEASON TICKET CARDS

This functionality allows for Fixtures to be added to an active Season Ticket card. The purpose of this functionality is to allow any Fixture that is not part of a Season Ticket but can be bought individually, such as a cup Fixture, to be added to a Season Ticket holder's card. This will then allow for the Season Ticket card to be used so that access to the venue for the purchased Fixture can be gained and there will be no need to print a paper ticket.

This section assumes that the following have been created:

- The Fixtures that are to be added to the Season Ticket card.
- The Series that represents the Season Ticket which has inclusive start and end dates which are applicable to the start date of the Fixture that are to be placed onto the card.
- The Series type Bookable Products that Season Tickets are sold under.

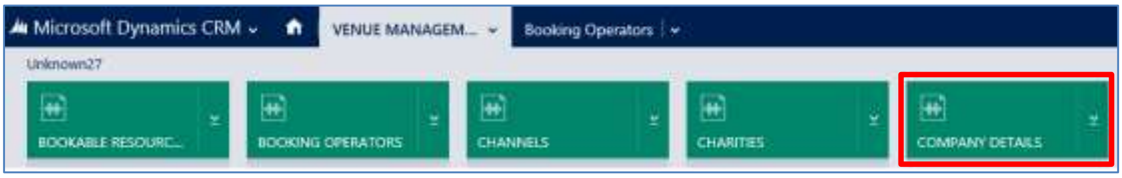
The process of adding a Fixture to a Season Ticket card requires the Settings in the Company Details form and Bookable Product form that represents the season ticket to be enabled.

STEP 1. SETTING THE COMPANY DETAILS FORM

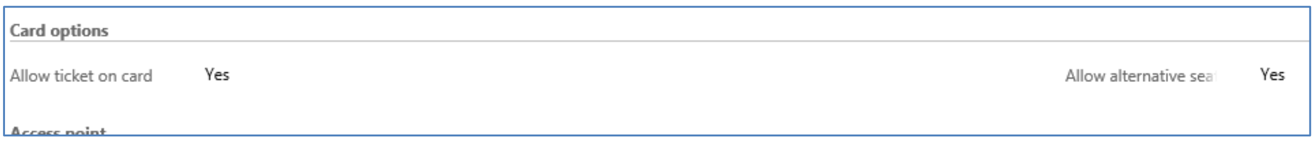
For this functionality to be set up a number of fields in the Company Details form within CRM must be completed. To do this complete the following instructions:

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

b) Choose the **Venue Management** tab in the navigation bar before scrolling across and selecting **Company Details.**



c) Open the Company Details form and scroll down to the **Card Options** section of the form as is shown below before completing the following details:



- **Allow ticket on card.** Select **Yes.** This will enable the assigning of fixtures to a valid Season Ticket in the Edit Beneficiaries screen of the POS. If **No** is selected then fixtures cannot be assigned to a valid Season Ticket.
- **Allow alternative seat on card.** Select **Yes** if you want to allow a fixture ticket that has a different block, row and seat to be assigned to a Season Ticket card. For example this would mean a Season Ticket holder is able to select a different seat to that of their Season Ticket seat to be uploaded onto the card. If **No** is selected then it will only allow fixtures with the same block, row and seat as the Season Ticket card to be assigned to the card.

d) Select the **Save** icon in the bottom right hand corner of the Company Details form.

STEP 2: SETTING THE SEASON TICKETS (SERIES TYPE) BOOKABLE PRODUCT FORM

For each Bookable Product form that a Season Ticket is sold upon, the **Is Membership** field within the form must be selected to **Yes** in order for the Season Ticket to be used as a card for which fixture tickets can be assigned to. Additionally, the **Beneficiary Requirement** field in the Bookable Product form must be set to either **Requested** or **Required**.

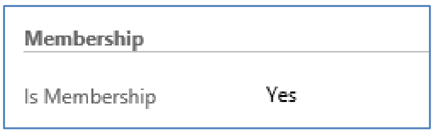
To do this complete the following in CRM:

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 **Bookable Products** from the drop down.

c) A list of the currently active Bookable Products will be displayed. Find and open the Bookable Product that Season Tickets are sold on. The Bookable Products will be type Series.

d) With the Series type Bookable Product form open, find the Membership section of the form and ensure that the following has been completed.



- **Is Membership.** Ensure that this field is selected to **Yes**. This will enable the Season Ticket card to have Fixtures added onto it in the POS.

- **Beneficiary Requirement.** Ensure that this field is set to either **Required** or **Requested.**

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

ADDING FIXTURES TO A SEASON TICKET CARD - CRM SETUP CHECKLIST

Task	Completed?	Comments
Set the Card Options of the Company Details form.		Ensure the following two fields have been completed in the Company Details form: • Allow ticket on card. Yes • Allow alternative seat on card. Yes if a seat that is not the same seat as the Season Ticket holder can be added to the card. If not, select No
Set the Season Tickets Bookable Product form		On any active Bookable Product that a Season Ticket is sold under set; Is Membership to Yes.

3.11. PLACING A CUSTOMER ON HOLD

This functionality is the ability to put a Contact record on hold, preventing a customer from either purchasing a product, being allocated a ticket or being allowed access to a Venue. Reason codes can be captured to describe why the contact is On Hold as well as start and end dates for the On Hold status. For example, a contact may be put on hold due to a financial reason, such as not completing a payment.

The following describes how to create the On Hold reasons whilst also giving details of the On Hold audits so that it is possible to view and record the customers who are On Hold.

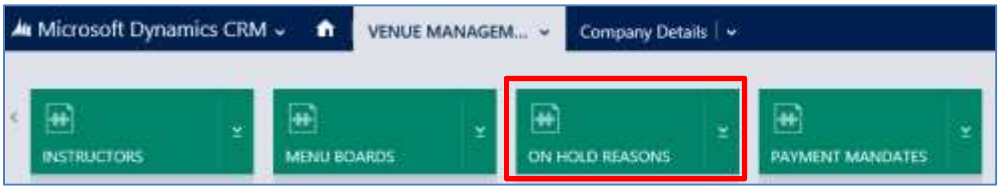
CREATING ON HOLD REASONS IN CRM

On Hold Reasons must be created for this functionality to work. These are the reasons that can be selected by the operator as to why the customer is being, or has been, placed on hold.

To create On Hold Reasons in CRM, complete the following:

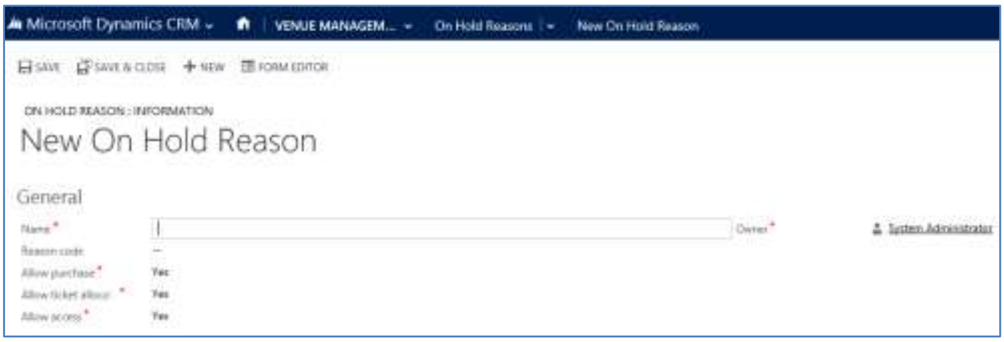
a) Select or hover over the **Microsoft Dynamics CRM** tab before scrolling across the drop down list of the navigation bar and selecting **Venue Management**.

b) Choose the **Venue Management** tab in the navigation bar before scrolling across and selecting **On Hold Reasons.**



c) A list of any currently active On Hold reasons will be displayed, select **New** on the ribbon.

d) A new On Hold Reasons form will be displayed, complete the following:



- **Name.** Enter the name of the On Hold Reason. For example, Financial.
- **Reason code.** Enter a description of the On Hold reason.

- **Allow purchase.** Select **Yes** if a customer placed On Hold for this reason will still be able to purchase tickets. Select **No** if the customer placed on hold for this reason will not be able to purchase tickets.
- **Allow ticket allocation.** Select **Yes** if a customer placed On Hold for this reason will still be able to be allocated tickets. Select **No** if the customer placed on hold for this reason will not be able to be allocated tickets.
- **Allow access.** Select **Yes** if a customer placed On Hold for this reason will still be able to access the venue. Select **No** if the customer placed on hold for this reason will not be able to access the venue.
- **Owner.** This field will already be completed.

a) Select **Save and Close** on the ribbon. The above steps will need to be repeated for each On Hold Reason that is required in the system.

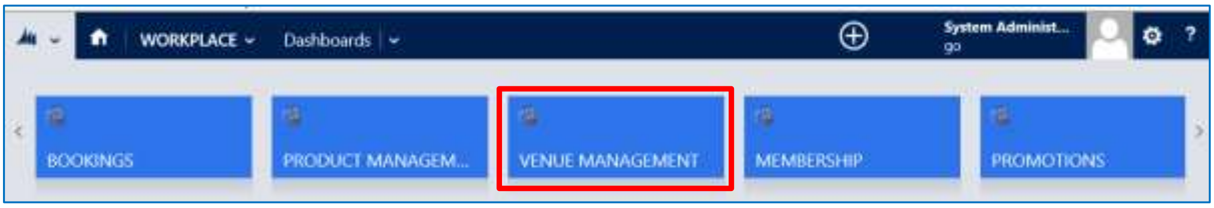
ON HOLD AUDITS IN CRM

On Hold Audits in CRM can be found both on the On Hold Reasons form and the Contacts form.

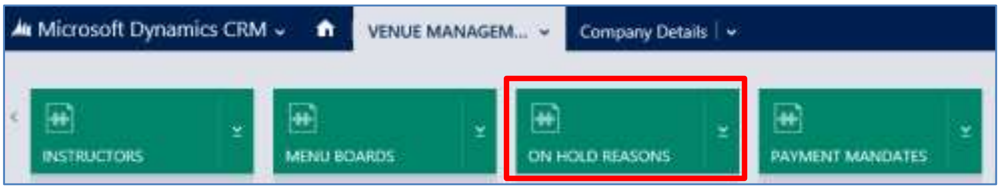
Firstly On Hold Reason forms can be selected to display all of the customers who have been put On Hold for that reason. For example if an On Hold Reason form that is named Financial is opened and On Hold Audits is selected, all of the customers who have been placed On Hold for Financial reasons will be displayed.

To view the On Hold Audits on the On Hold Reasons form, 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 **Venue Management**.

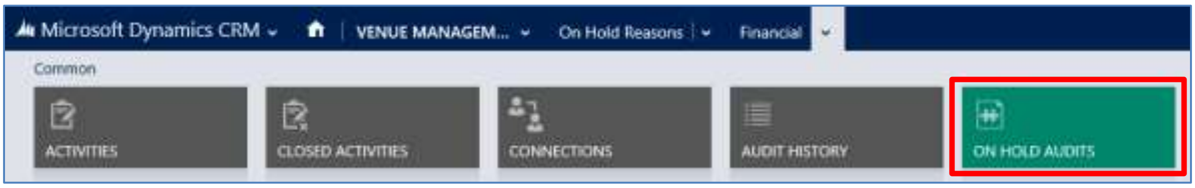


b) Choose the **Venue Management** tab in the navigation bar before scrolling across and selecting **On Hold Reasons.**

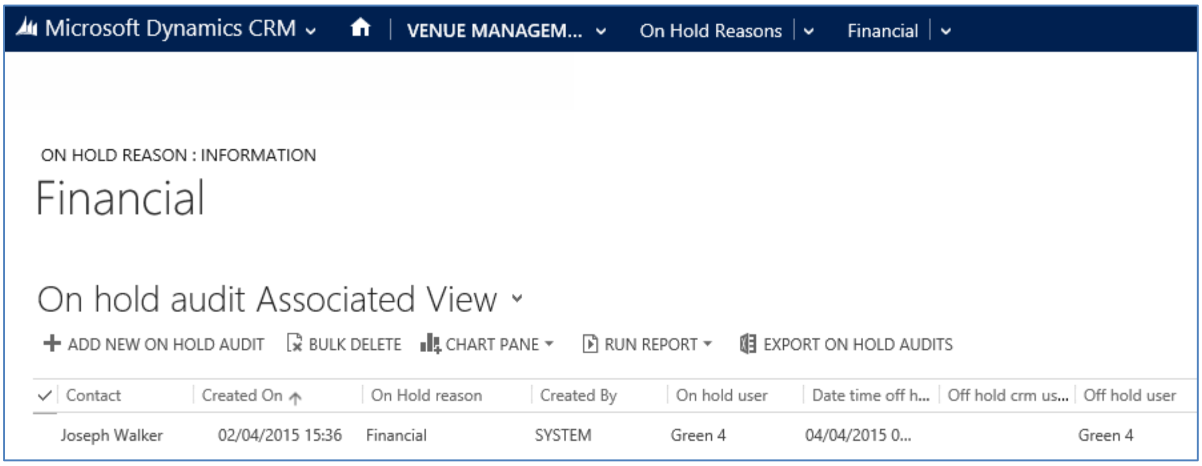


c) A list of any currently active On hold reasons will be displayed, open up the On Hold Reason form that the audit is to be displayed, e.g. Financial.

d) In the On Hold Reasons form, select the small arrow next to the name of the On Hold Reason, from the drop down choose On Hold Audits.

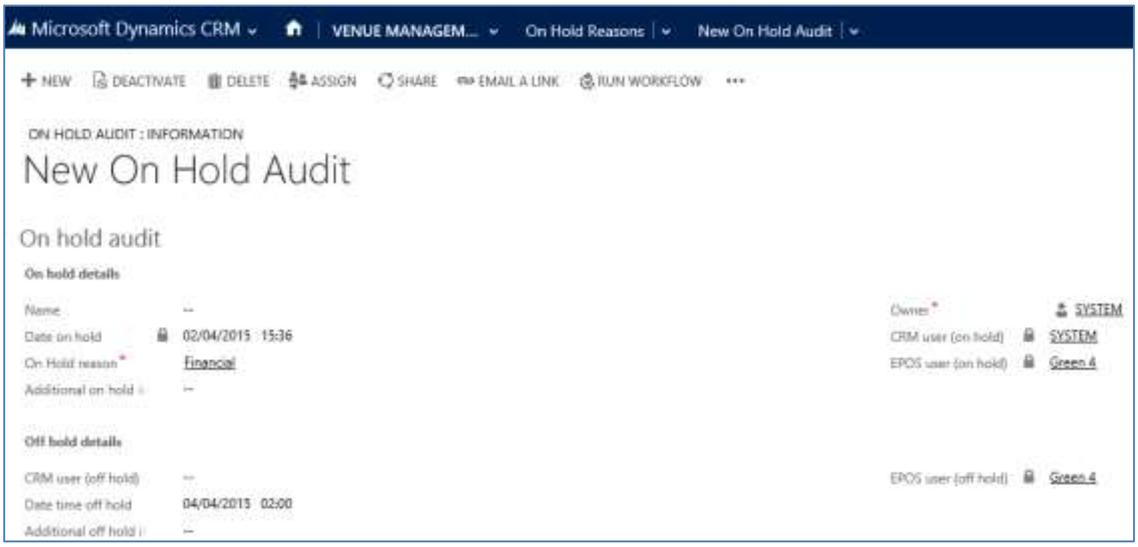


e) The On Hold Audits will be shown displaying all of the customers who have been put on hold for the On Hold Reason selected.



f) More information regarding the customer and their On Hold status can be displayed by highlighting the specific customers name and then double clicking on their name.

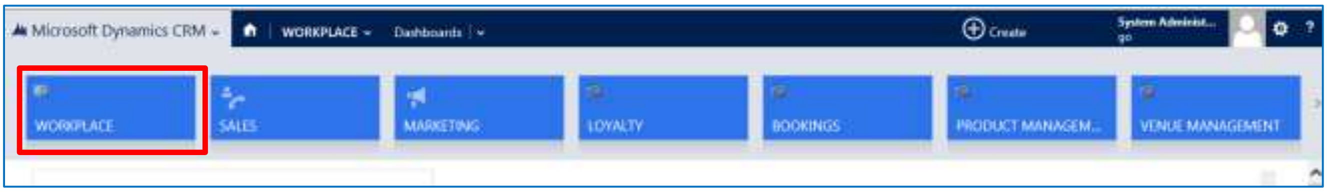
g) This will display the customers **On Hold Audit Information** with information regarding the Date the customer was put on hold, the On Hold reason, the operator who took the Customer off hold and the date and time off hold was selected (if applicable).



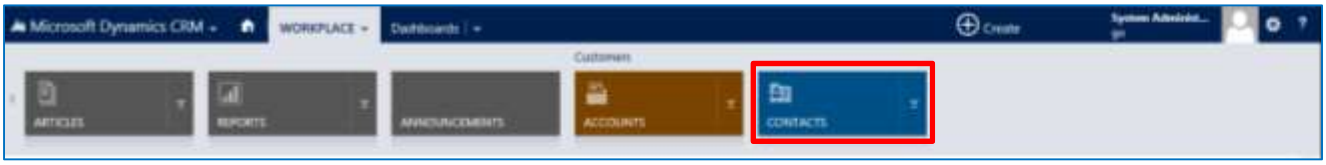
A Contact can also be searched for and then within the contacts form the On Hold Audits can be selected. This will display if the contact has or has been on hold at any time, as well the On Hold Reason if applicable. From here additional information regarding the contacts On Hold status can be displayed.

To view the On Hold Audit on the Contact form in CRM complete the following:

a) Select or hover over the Microsoft Dynamics CRM tab before clicking **Workplace** from the drop down list of the **Navigation Bar**.



b) Hover over the **Workplace** tab to display the related entities. Scroll across the drop down row of related areas and select **Contacts**.

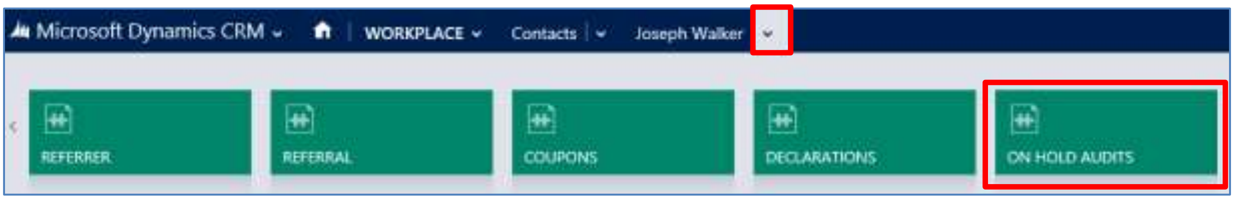


c) The **Contact View** with the list of My Active Contacts will be displayed.

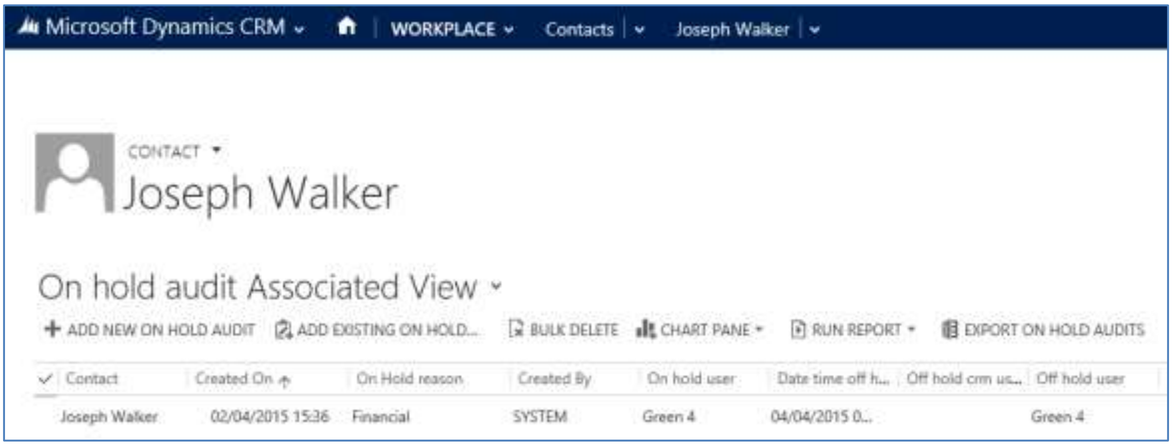
d) Use the Search for records field, highlighted above, to find a Contact whose On Hold Audit is to be displayed.

e) Open up the searched for Contacts form.

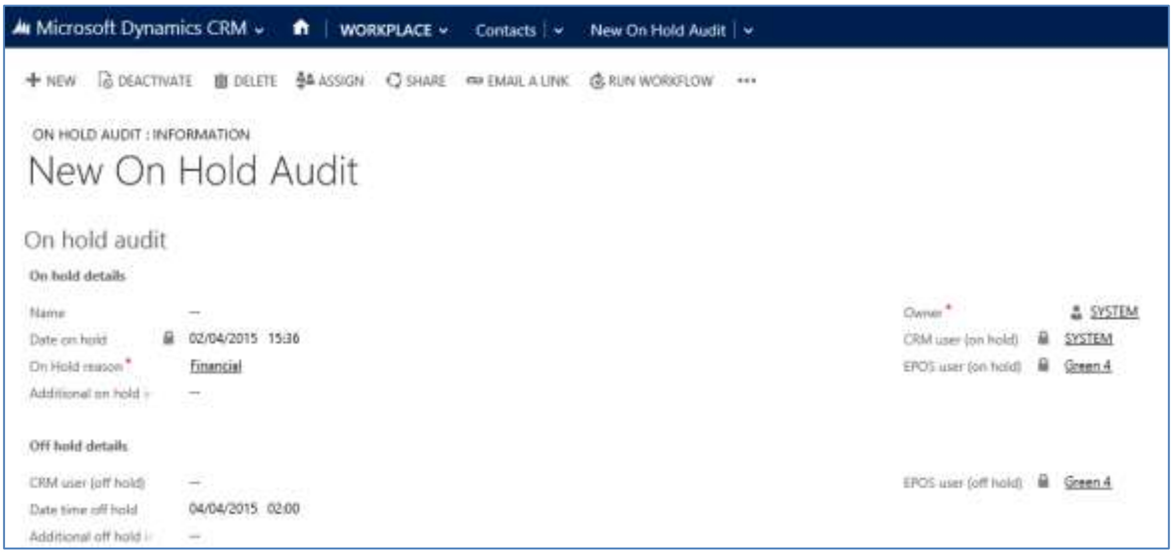
f) In the navigation bar select the small arrow next to the Contacts name. Scroll across and select **On Hold Audits.**



g) The On Hold Audits will be shown displaying any On Hold reasons for the contact.



h) The On Hold Audits can be opened further to gain more information regarding the customers On Hold status. This can be displayed by highlighting and double clicking on the contacts name.



i) This will display the customers On Hold Audit Information with information regarding the Date the customer was put on hold, the On Hold reason, the operator who took the Customer off hold and the date and time off hold was selected (if applicable).

CONTACTS ON HOLD REPORT

A report can be generated to display all of the contacts who have been put On Hold and includes the contacts name, the date they were put on hold, the reason for it, the off hold date (if applicable), the code and also if the contact is allowed to purchase tickets, have tickets allocated to them or are allowed access to the venue.

To generate the report in CRM:

a) Select the **Microsoft Dynamics CRM** tab in the Navigation bar before choosing **Workplace** from the drop down.

b) Choose **Workplace** and from the drop down select **Reports.**

c) A list of Available Reports will be displayed.

d) From the list of reports, select the **Contacts On Hold** report. This report will then be generated as is shown in the example below.

e) It is possible to open up the contacts form by clicking on the name of a Contact in the report.

Contacts On Hold

Name	On Hold Date	Reason	Off Hold Date	Code	Allow Purchase	Allow Ticket Allocation	Allow Access
Joe Walker	10/06/2015 10:25	Financial	29/06/2015		No	No	No
Jon Paul Medland	10/06/2015 10:40	Unpaid Fees	29/06/2015		No	No	No
Trudi Bissett	10/06/2015 10:40	Banned from Stadium	27/07/2015		No	No	No

3.12. RESERVATIONS

The reservations functionality in Green 4 Ticketing enables you to reserve tickets for a future event for a customer that already holds a ticket. This can be used to reserve an individual Fixture type product, for example a cup game or entire Series type product such as a Season Ticket.

The reservation can be set up with an expiry date, so once this date has passed the Fixture or Series is no longer reserved for the individual customer.

Reservations work by creating the following:

- **A Source Reservation Product (Series):** The existing ticket, such as an existing Season Ticket
- **Target Reservation Product:** The new ticket that is being reserved for the customer for example a Cup Fixture or Season Ticket for the following season.

An example of how a Reservation can work is as follows. A reservation can be set up for an existing Season Ticket holder to buy tickets for a cup match. The reservation holds a Cup Match ticket for the Season Ticket holders for the specified period of time and will be released for sale to other purchasers when the expiry date has passed.

A Reservation is required for every Bookable Product that is sold, for example all Season Ticket holder products. As a result, this can lead to a large list of Reservations.

This section assumes that the following has already been created.

- The Fixture or Series that is to be Reserved.
- The Series product that the Reserved Fixture or Series is to be Reserved against.

The process of setting up a Reservation in CRM 2015 includes Setting up a Reservation Payment type method (This only needs completing once in the system), creating the Source Reservation product and finally the Target Reservation product.

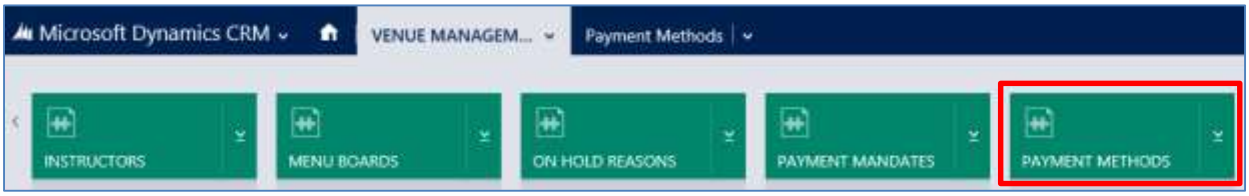
STEP 1. SETTING UP THE RESERVATION PAYMENT METHOD

The Reservation Payment Method only needs creating once within the CRM system, therefore if a Reservation Payment Method already exists this part can be skipped.

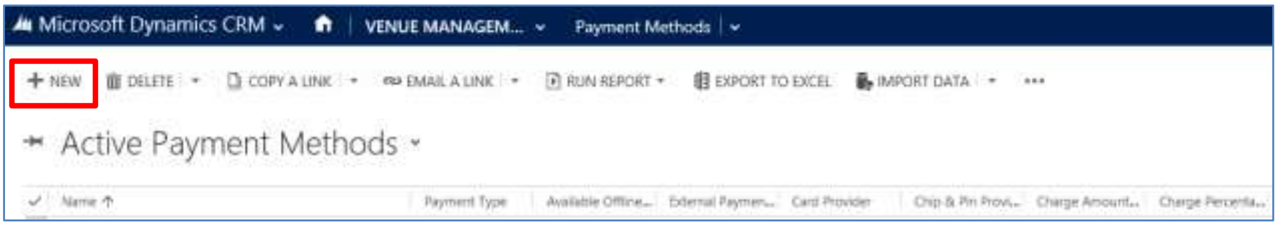
To create a Reservation Payment Method, complete the following:

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

b) Choose the Venue Management tab in the navigation bar before scrolling across and selecting **Payment Methods.**

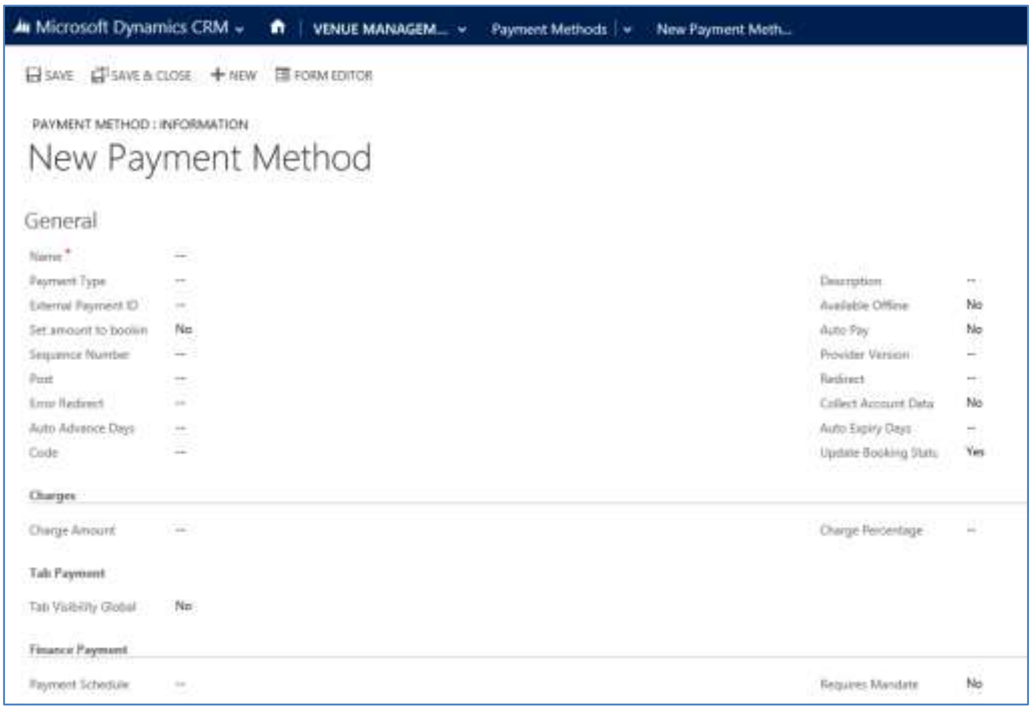


c) The Payment Methods view will be displayed, select **New** on the ribbon.



d) A blank Payment Method form will be displayed, complete the following:

Note: All other fields not listed below do not have to be completed or changed.



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

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

Example of the Reservation Payment Method form created

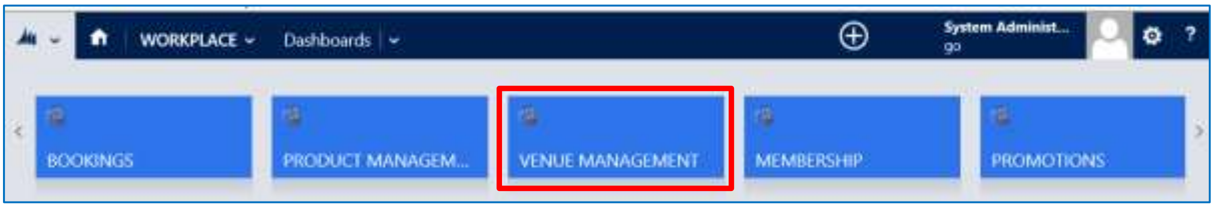
Record Type	Name	Payment Type
Payment Method	Reservation	Reservation

STEP 2. CREATING THE SOURCE RESERVATION PRODUCT

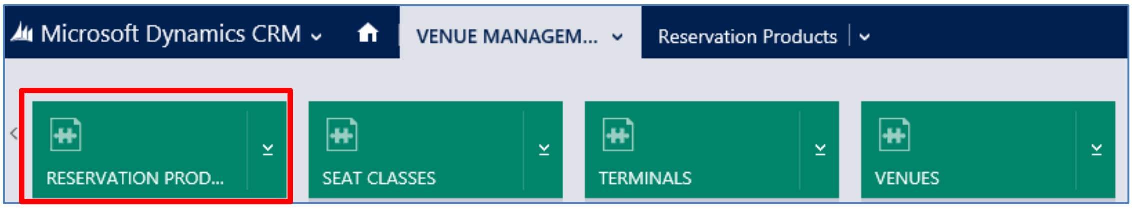
The source reservation product represents the product that the customer already holds, for example a Season Ticket for the current season.

To create the Source Reservation product, complete the following:

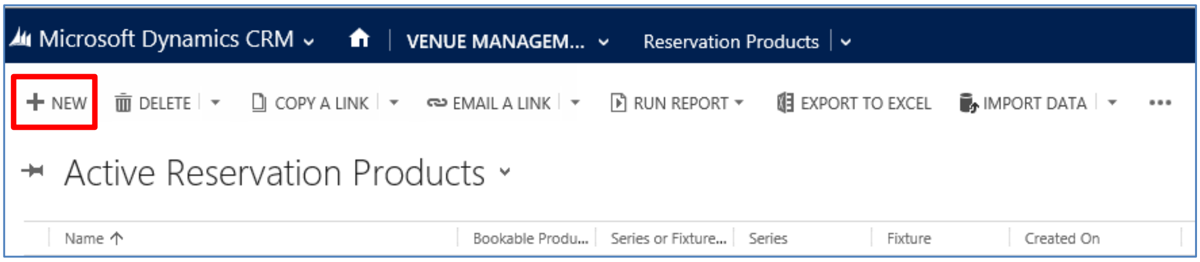
a) Select or hover over the **Microsoft Dynamics CRM** tab before scrolling across the drop down list of the navigation bar and selecting **Venue Management**.



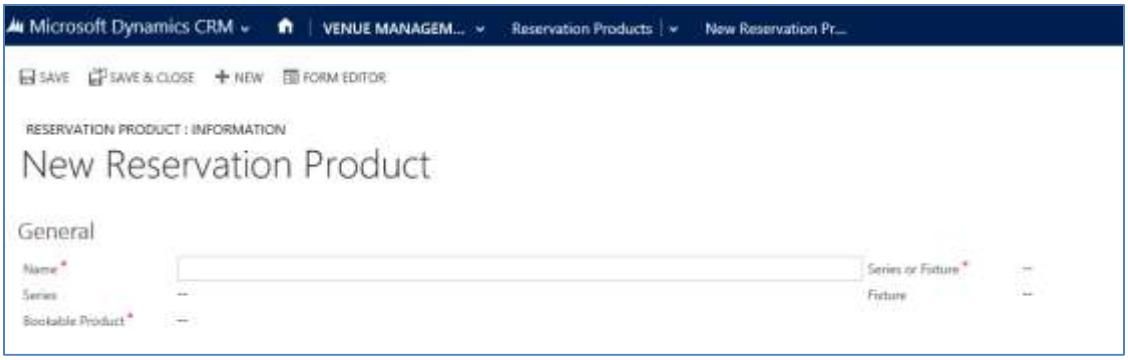
b) Choose the Venue Management tab in the navigation bar before scrolling across and selecting **Reservation Products.**



c) All Active Reservation products will be displayed. Select New on the ribbon.



d) A blank Reservation Product form will be displayed, complete the following details:



- **Name.** Enter a name for the Source Reservation Product, for example Season Ticket 15/16.
- **Series or Fixture.** Select **Series** here as all Source Reservation Products should be a Series. For example, the Source product held by the customer is a season ticket.
- **Series.** Use the Look up Records dialog to search for the relevant Series.
- **Fixture.** This field should be left blank
- **Bookable Product.** Use the Look up Record dialog to select the Bookable Product that is held by the customer that represents the Series type product.

e) Once the details are complete select **Save and Close.**

Example of the Source Reservation Product form created

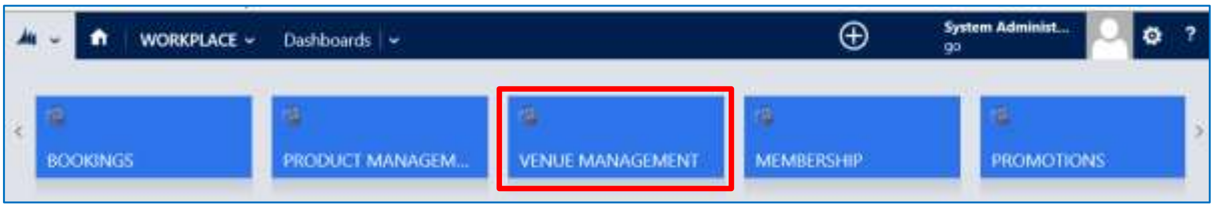
Record Type	Name	Series/Fixture	Series	Fixture	Bookable Product
Source Reservation Product	Season Ticket 15/16-Standard	Series	Season Ticket 15/16 Series	n/a	Season Ticket 15/16 Standard

STEP 3. CREATING THE TARGET RESERVATION PRODUCT

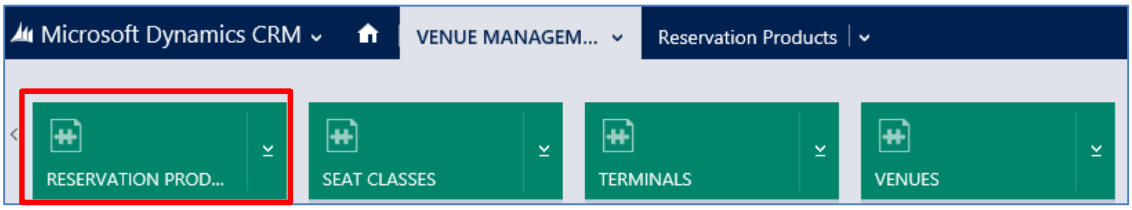
The Target Reservation Product represents the product that the reservation will be made for, for example a Season Ticket for the new season, or a Fixture Ticket at a pre-season friendly.

To create the target reservation product, complete the following:

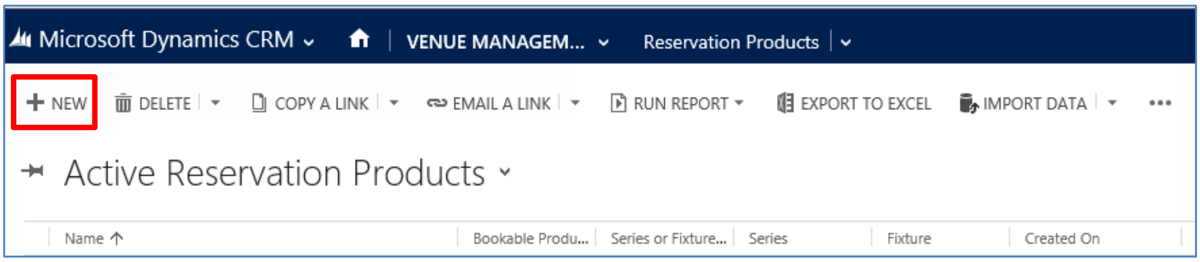
a) Select or hover over the **Microsoft Dynamics CRM** tab before scrolling across the drop down list of the navigation bar and selecting **Venue Management**.



b) Choose the Venue Management tab in the navigation bar before scrolling across and selecting **Reservation Products.**



c) All Active Reservation products will be displayed. Select **New** on the ribbon.



d) A blank Reservation Product form will be displayed, complete the following details:

- **Name.** Enter a name for the Target Reservation Product.
- **Series or Fixture.** Select whether the Target Reservation Product relates to a Series or a Fixture. For example, if the Target Product is a new season ticket, select Series, or alternatively if the reservation is for fixture such as a friendly or cup match, select Fixture.
- **Series.** If the Target Reservation Product relates to a Series, use the Look up Records dialog to search for the Series.
- **Fixture.** If the reservation product relates to a Fixture, use the Look up Records dialog to search for the Fixture.
- **Bookable Product.** Use the Look up Record dialog to select the Bookable Product that represents either the Fixture or Series. The Bookable Product must be linked to the same Bookable Resource as the Source Reservation product so that the seats can be matched.

e) Once the details are complete select Save and Close.

Example of Target Reservation Product forms created

The below example illustrates two Target Reservation Products that have been created. One representing a Series and the other a Fixture.

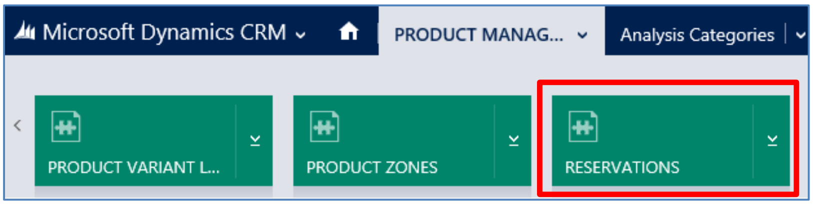
Record Type	Name	Series/Fixture	Series	Fixture	Bookable Product
Target Reservation Product	Friendly Fixture vs 4Sight	Fixture	n/a	Sporting Green 4 vs 4Sight	Friendly Fixtures 15/16-Standard
Target Reservation Product	Home Cup Fixtures 2015/16-Standard	Series	Home Cup Fixtures15/16	n/a	Cup Fixtures 15/16-Standard

STEP 4. CREATING THE RESERVATION

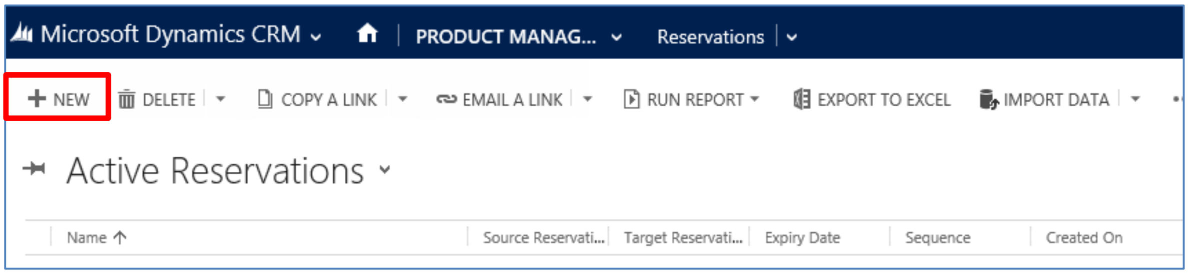
Having created the Source and Target Reservation Products, you can create the Reservation itself. The Reservation effectively joins the Source and Target products providing that the Bookable Resources match and creates a reservation for each customer holding the Source product. To create a reservation:

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**.

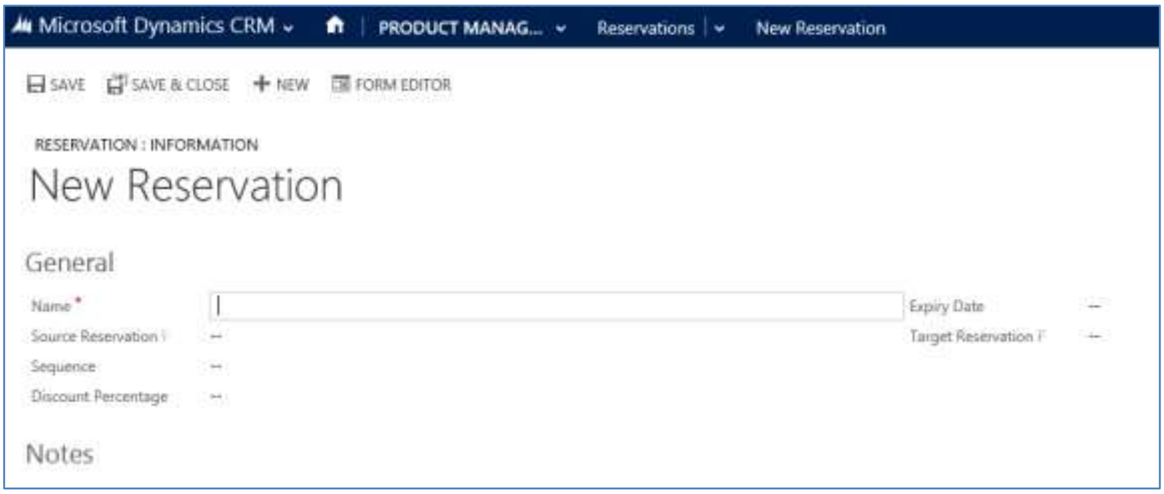
b) Next, in the Product Management area of CRM, select the **Product Management** tab before selecting **Reservations**.



c) The Reservations view will be displayed, select **New** on the ribbon.



d) A blank Reservation form will be displayed, complete the following.



- **Name.** Enter a name for the Reservation.
- **Expiry Date and Time.** Enter the date and time the reservations will expire. The customer must purchase the reserved tickets on or before the date and time entered. If the reserved ticket is not purchased on or before the expiry date/time the tickets will be returned to general sale.
- **Source Reservation Product (Series).** Select the source reservation product created as shown in Step 2 Creating the Source Reservation Product.

- **Target Reservation Product.** Select the target reservation product created as shown in Step 3 Creating the Target Reservation Product.
- **Sequence.** Enter the sequence number for the Reservation. The reservation number determines the priority of reservations when you have different source reservation products feeding into the same target reservation product. For more details see the example below.
- **Discount Percentage.** If applicable enter a Discount Percentage, this will be deducted from the current price of the reservation product. For example, if 50.00 is entered, when the reservation product is added to the basket in the POS or Web it will be displayed with a 50% discount.

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

Note: The reservation will only become available to the customer once their Source Product ticket has been printed.

Example of Reservation forms created

Two Reservation records have been completed as examples for this document. The first is reserving a ticket for a fixture, for example, Friendly Fixture vs 4Sight for all Season Ticket Holders and the second is reserving all Home Cup games for Season Ticket Holders.

Record Type	Name	Source	Target
Reservation	4Sight Friendly Reservation for Season Ticket Holders	Season Ticket 15/16-Standard	Friendly Fixture vs 4Sight
Reservation	Home Cup Reservation for Season Ticket Holders 15/16	Season Ticket 15/16-Standard	Home Cup Fixtures 2015/16-Standard

USING SEQUENCE NUMBERS WITH RESERVATIONS

If you sell two types of season tickets, for example Weekday League Games and Weekend League Games, and you want customers with both of these ticket types to be offered a match day ticket for an upcoming cup match.

In this example you could have two people using the same seat, i.e. Susan Jones sits in seat A1 at the weekend (using her weekend season ticket), whereas John Smith sits in seat A1 during the week (using his weekday season ticket). When you set up the reservation, you must therefore decide which source product takes priority. The reserved seat will be offered to the individual holding the priority ticket only. In Green 4 Ticketing priority is set using the sequence number on the reservation.

The table below explains how the sequence numbers could be used:

Customer Name	Season Ticket Type	Season Ticket Priority	Seat Number	Target Seat Reserved?
Susan Jones	Weekend League Games	1	A1	Yes
John Smith	Weekday League Games	2	A1	No
Helen Milton	Weekday League Games	2	A2	Yes

Holders of lower priority source products will only receive a reserved ticket if the seat they usually occupy is not distributed through a higher priority reservation.

To set up reservations for two source products carry out the following:

a) Create a Source Reservation Product for the **Weekend League Games** series

b) Create a Source Reservation Product for the **Weekday League Games** series.

c) Create a Target Reservation Product for the **Cup Match**.

d) Create a reservation to link the **Weekend League Games** reservation product to the **Cup Match**. Ensure that the sequence number is set to 1 (this is the priority)

e) Create a reservation to link the **Weekday League Games** reservation product to the **Cup Match**. Ensure that the sequence number is set to 2.

Note: When creating reservations using a number of source reservation products, it is important that you create the reservations in order of priority, i.e. you create the highest priority reservations first.

3.13. ALLOWING TICKET MOVES/UPGRADES

The Upgrade/Move options available allow Season Ticket holders to Upgrade or Move their seat booking on a match-by-match basis. Reasons for this, for example, could be:

- The customer holds an Adult and a Junior Season Ticket, but for an upcoming Fixture the junior is unable to attend the match. The customer therefore wants to upgrade the junior ticket to an adult ticket for one Fixture only. The customer can use the upgraded ticket to take a friend or family member who is not the Season Ticket Holder.
- The customer holds an Adult Season Ticket, but for an upcoming Fixture they would like to purchase an additional ticket for a friend and sit next to them during the game. As the season ticket holder knows the seats next to him are taken by other Season Ticket holders, he selects to move his Season Ticket for one Fixture only allowing him to sit next to his friend.

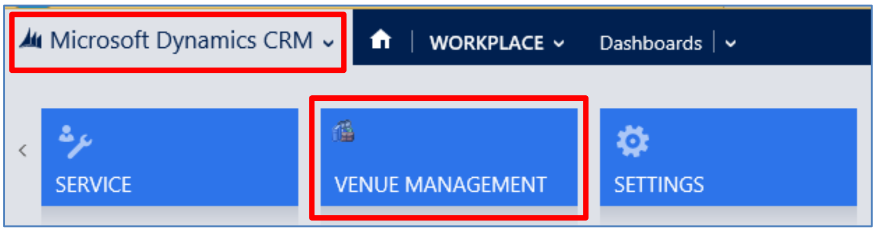
To enable ticket moves and upgrades the following steps within CRM must be followed.

STEP 1: CREATE THE SERIES TYPE PAYMENT METHOD

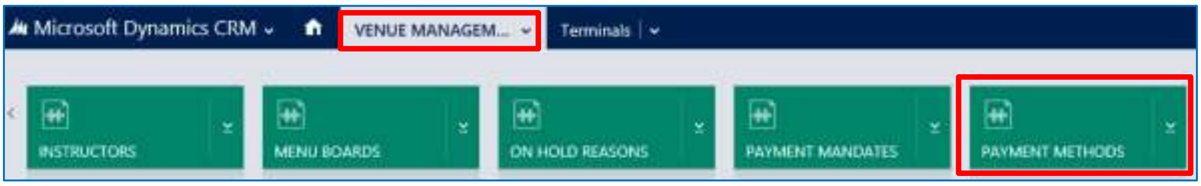
A Series type Payment Method must be created and exist within the system, there is no need to link this Payment Method to a Channel.

To create a Series type Payment Method, complete the following instructions:

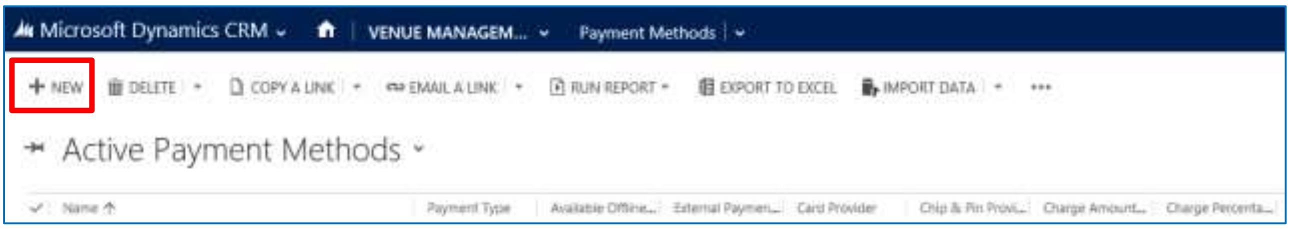
a) Within CRM, select the **Microsoft Dynamics CRM** tab in the navigation bar before scrolling across and choosing **Venue Management** from the drop down.



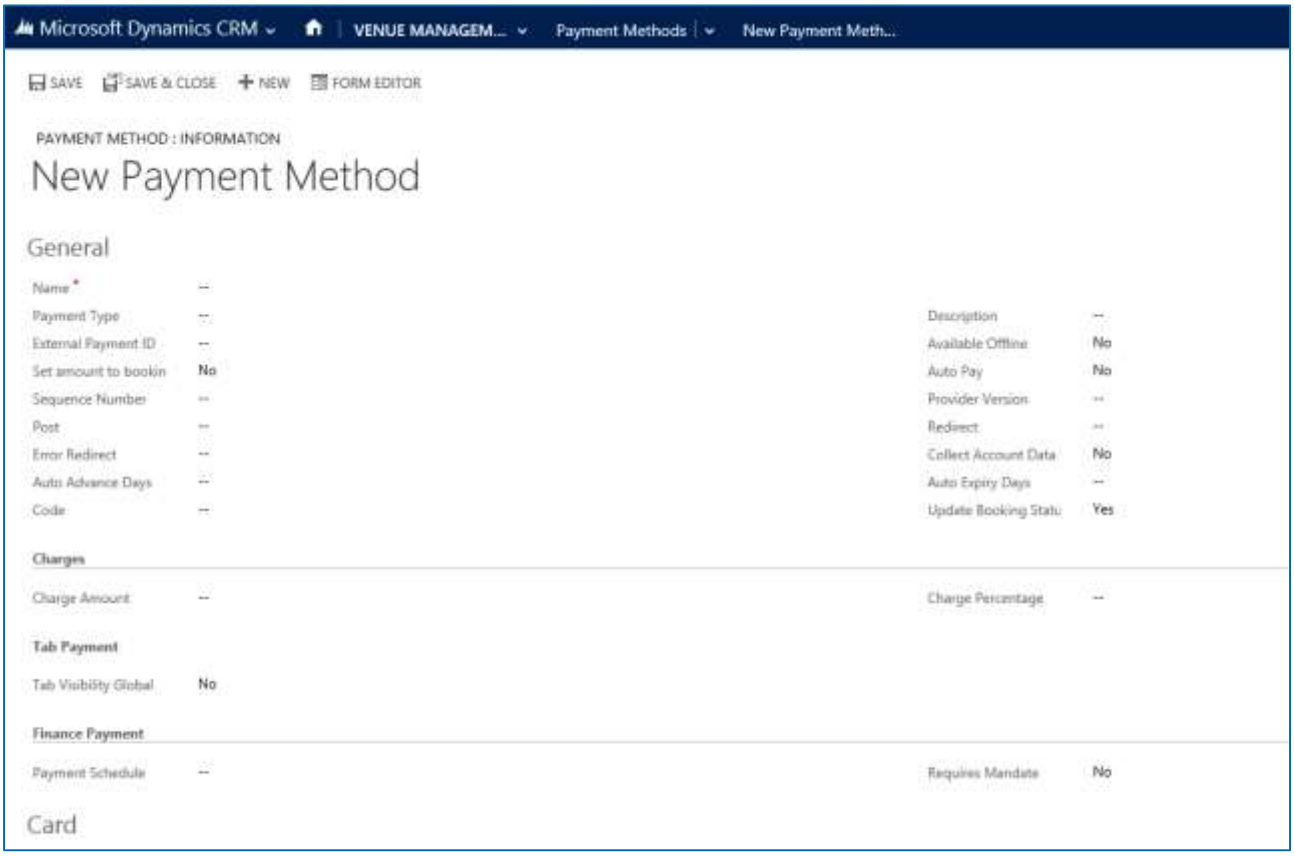
b) Next select the **Venue Management** tab in the navigation bar and from the drop down choose **Payment Methods.**



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



d) A New Payment Method form will be displayed, complete the following details



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

Note: All other fields within the Payment Method form do not need to be completed

e) When the details are complete select **Save and Close** on the ribbon.

Example of Payment Method Record Created

The table below shows the Series type Payment Method that must be created in CRM in order to allow an Upgrade/Change of seats.

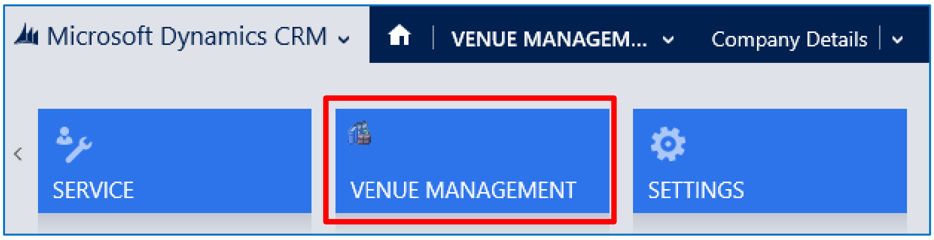
Record Type	Name	Payment Type	Channel
Payment Method	Series	Series	None

STEP 2: SET CHANNEL TO ACCEPT UPGRADES/MOVES

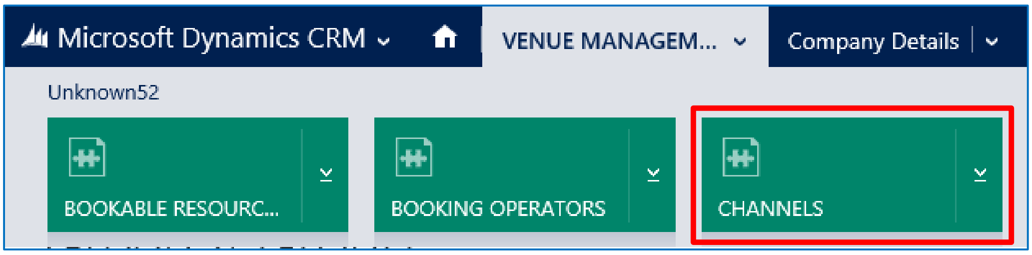
For each channel that you wish to allow customers to Upgrade or Move their seat ticket, you must set the **Allow Series Seats to be Changed** setting to **Yes** within the Channel form.

To achieve this, 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.

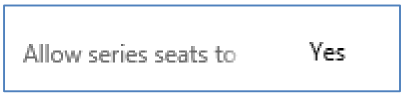


b) Next select the **Venue Management** tab in the navigation bar and from the drop down choose **Channels.**



c) A list of Active Channels will be displayed, select and open the Channel that will allow customers to Upgrade or Move their seat ticket. If this is applicable to more than one Channel the process below should be repeated for each Channel.

d) With the Channel form open, ensure that the following flag is completed:



Allow Series Seats to be Changed. Set this to **Yes**

e) Select the **Save** icon in the bottom right hand corner of the screen. Repeat the above steps for each Channel where it is possible to Move/Upgrade seats.

STEP 3: SET THE CREDIT PERCENTAGE FOR FIXTURES

Before Series ticket holders can start upgrading or moving seats for a Fixture, it is necessary to define the value of their "traded in" ticket. The Credit Percentage determines how much the traded in Fixture ticket (bought as part of the Series) is worth when purchasing a seat during a Move or Upgrade operation. For example:

- John Smith has a Season Ticket (Bookable Resource = Standard seat) for seat A1.
- The cost of a Standard seat (as a Fixture ticket) is £20.
- A Credit Percentage is set on individual Fixtures, for example you may set the percentage at 80% for popular Fixtures. In this instance John would get £16 towards his new seat (80% of £20). This price will be taken off the cost of the new ticket which the customer is moving to. 0% can be entered into the Fixture form if the customer is expected to pay the entire cost for a new ticket when moving seats.

To set the Credit Percentage for Fixtures, complete the following details within CRM:

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

f) 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.**

c) A list of currently Active Fixtures will be displayed, select and open the fixture where the Credit Percentage is to be entered.

d) With the Fixture form open, ensure the following field is completed:

- **Credit Percent.** Enter the appropriate Credit Percent that is to be used for this Fixture. The percentage will be used to work out how much of the total cost of the current ticket will be put towards the cost of the ticket when moving seats.

e) Select the **save** icon in the bottom right hand corner of the form.

ALLOWING TICKET MOVES/UPGRADES CHECKLIST

Task	Completed?	Comments
1. Create a Series type Payment Method		Ensure the **Payment Type** is **Series**
2. Set the Channel to accept Upgrades/Moves		Ensure **Allow Series Seats to be Changed** has been set to **Yes** in the Channel
3. Set the Fixtures Credit Percent		Ensure the correct Credit Percent has been entered into each Fixture forms **Credit Percent** field

3.14 PRINTING INDIVIDUAL FIXTURE TICKETS FOR A SERIES

On occasion it may be necessary to print a ticket for an individual Fixture purchased as part of a Series ticket. For example:

- An organisation may have bought a number of Season Tickets, which are distributed to different individuals, clients or suppliers on a weekly basis.
- A customer has arrived at the stadium without their Season Ticket and therefore cannot access the ground.

STEP 1: SET CHANNEL TO ACCEPT UPGRADES/MOVES

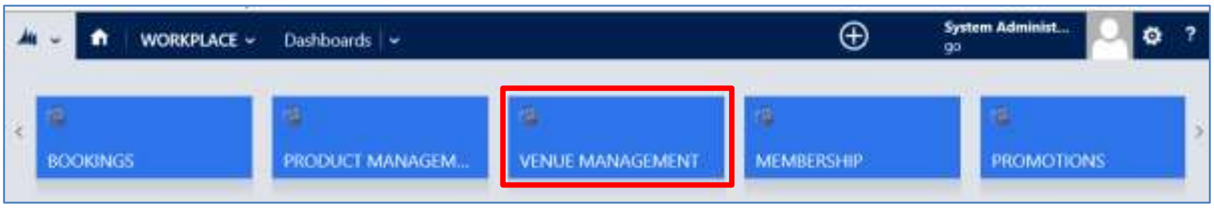
The Fixture printing functionality will be available if Moves and Upgrades are enabled on the Channel. See Step 2: Set Channel to Accept Upgrades/Moves allowing Ticket Moves/Upgrades for details on how to do this if it has not already been completed.

STEP 2: CREATE A BOOKABLE RESOURCE

A Bookable Resource must be created to link all Blocks in the system to it, via the use of Venue Configuration Blocks. If there are Unseated Blocks, two Bookable Resources must be created; one for Seated Fixture Tickets and one for Unseated Fixture Tickets.

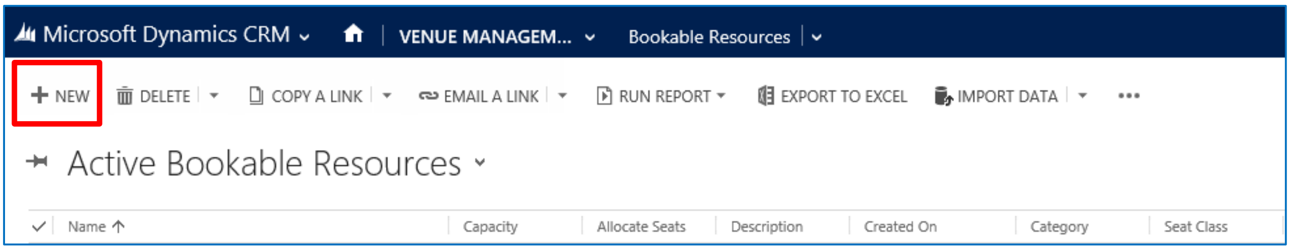
To create a Bookable Resource record:

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**.



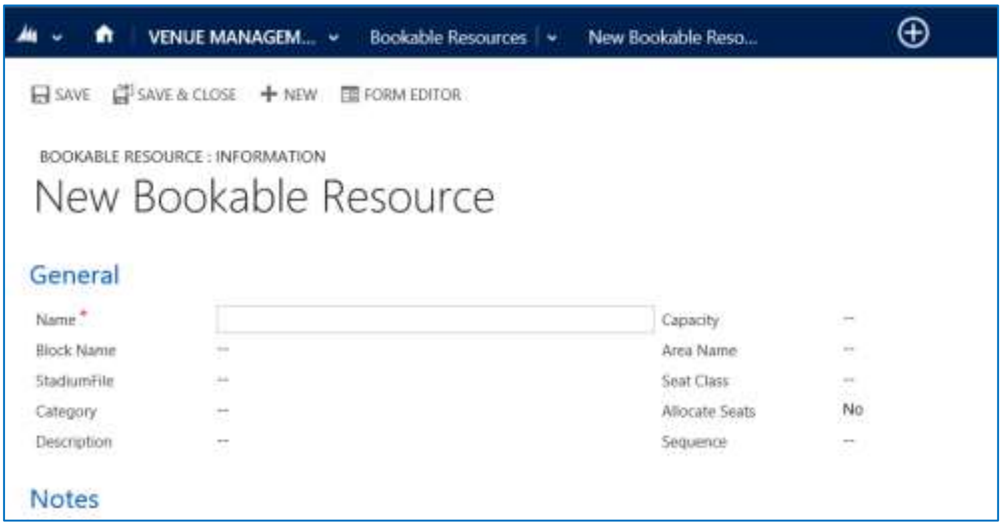
b) Next, in the Venue Management area of CRM, select the **Venue Management** tab before selecting **Bookable Resources** in the navigation bar.

c) A list of the currently Active Bookable Resources will be shown. Select **New** on the ribbon



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

Note. The fields below that are not listed on the Bookable Resource form do not need to be completed.



- **Name.** Enter the name of the resource, for example All Seated Blocks.
- **Allocate Seats.** Select **Yes** if the resource requires seats to be allocated, for example for standard or hospitality seats at a stadium where the seats would have to be allocated. Alternatively for unseated tickets, seats do not need to be allocated so **No** can be selected. **No** should also be chosen if the ticket holder can sit anywhere within the chosen block.
- **Category.** If applicable enter a category for the Bookable Resources.
- **Sequence.** If applicable, enter a sequence number for the bookable resource. The sequence number determines the order in which records appear in the Go system.

e) When the details are complete select **Save** in the ribbon.

Example Of Bookable Resource Records Created

Two Bookable Resource records have been created, one to hold all Seated Blocks within it and the other for Unseated Blocks. These are displayed as examples in the table below:

Record Type	Name	Allocate Seats
Bookable Resource	All Seated Blocks	Yes
Bookable Resource	All Unseated Blocks	No

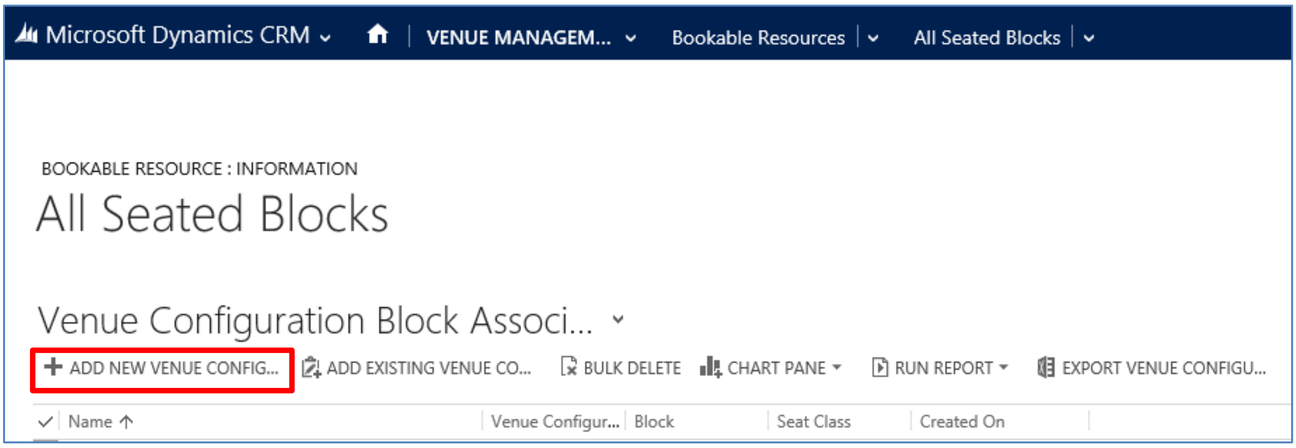
STEP 3: ADD THE VENUE CONFIGURATION BLOCKS

New Venue Configuration Blocks must be added against the Bookable Resource. These should represent all Blocks that a ticket could be assigned to with each Block and Seat Class combination.

To add Venue Configuration Blocks against the Bookable Resource, the following instructions should be carried out:

a) With the Bookable Resource form open, select the small arrow in the navigation bar next to the name of the Bookable Resource. From the drop down, select **Venue Configuration Blocks.**

b) The Venue Configuration Block Associated View will be displayed, select **Add New Venue Configuration Block** on the ribbon.



c) A New Venue Configuration Block form will be displayed, complete the following details:

- **Name.** Enter a name for the venue configuration block, for example East Block – Standard - All Seated.
- **Block.** Use the Look Up records dialogue to select the appropriate Block
- **Bookable Resource.** This field should already be completed with the Bookable Resource completed in Step 2 inserted here.
- **Venue Configuration.** Use the magnifying glass to look up and select the appropriate Venue Configuration.
- **Seat Class.** Use the Look Up Records dialog to select the appropriate Seat Class. The Seat Class should match one of the Seat Classes used in the block that has been added to the Venue Configuration Block.
- **Sequence**. If applicable enter a sequence number.

d) Select **Save and Close** on the ribbon. Repeat the above instructions until all Block-Seat Class combinations have been covered and linked to the Bookable Resource.

Examples Of Venue Configuration Blocks Created

Numerous Venue Configuration Blocks have been created in this example and can be seen in the table below. In this example these have been added against the All Seated Blocks Bookable Resource.

Record Type	Name	Block	Bookable Resource	Venue Configuration	Seat Class
Venue Configuration Block	East Block - Restricted View- All Seated	East Block	All Seated Blocks	Standard Stadium Layout	Restricted View
Venue Configuration Block	East Block – Standard- All Seated	East Block	All Seated Blocks	Standard Stadium Layout	Standard
Venue Configuration Block	North Block – Standard- All Seated	North Block	All Seated Blocks	Standard Stadium Layout	Standard
Venue Configuration Block	North Block – Hospitality- All Seated	North Block	All Seated Blocks	Standard Stadium Layout	Hospitality

STEP 4: CREATE A NEW BOOKABLE PRODUCT

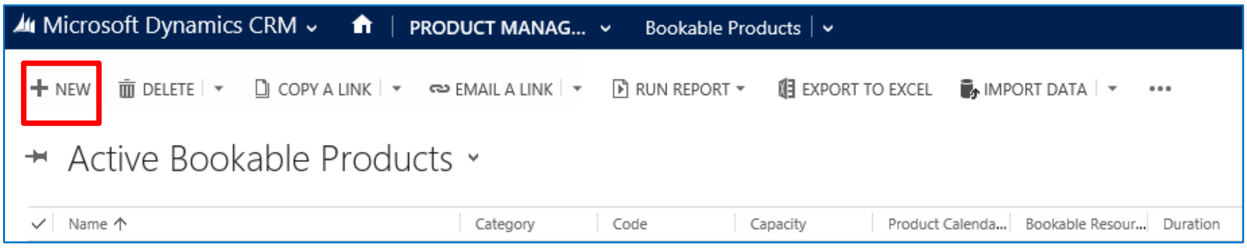
In addition it will be necessary to add a new Bookable Product, however only a limited number of fields within this Bookable Product will need completing. If two Bookable Resources have been created representing both Seated and Unseated blocks, two Bookable Products must also be created, one for Seated Fixture Ticket and one for Unseated Fixture Ticket.

To create the Bookable Product, complete the following instruction:

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

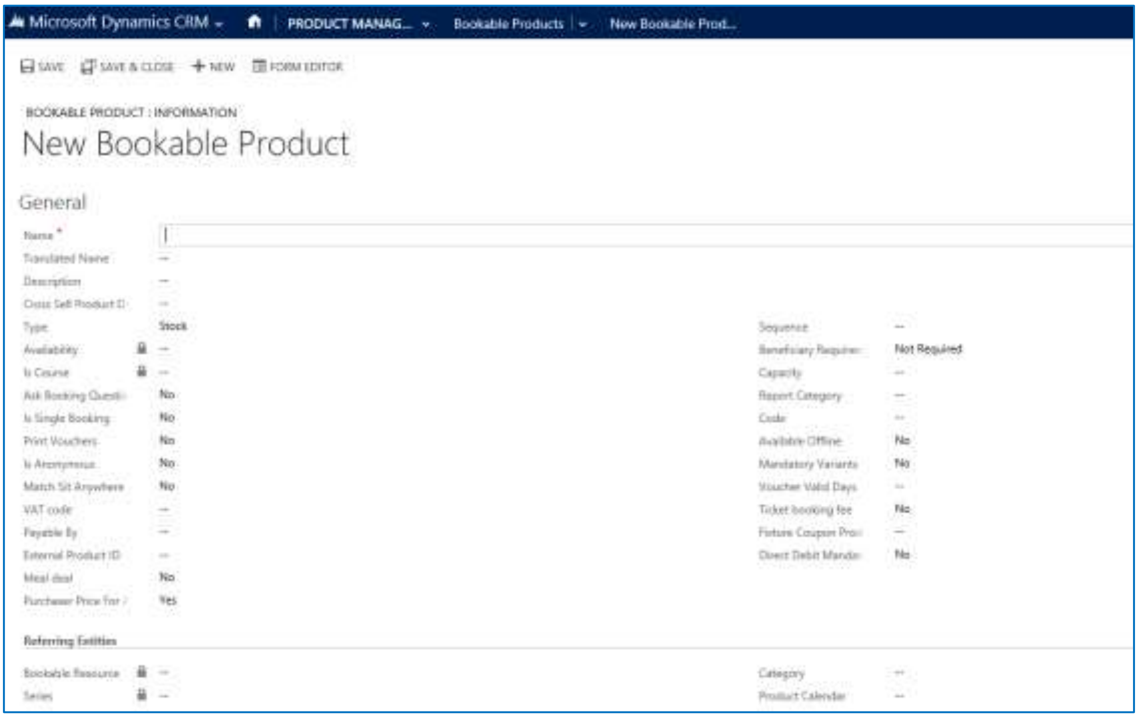
d) Next, in the Product Management area of CRM, select the **Product Management** tab before selecting **Bookable Products** from the drop down.

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



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

Note. All other fields in the Bookable Product form that have not been described below do not need to be completed/changed.



- **Name**. Enter a name for the Bookable Product e.g. Fixture Ticket.
- **Type.** Set to **Fixture.**
- **Match Sit Anywhere.** Set to **Yes.**
- **Beneficiary.** Set to **Required.**
- **Bookable Resource.** Use the magnifying glass to look up and select the Bookable Resource (Step 2) that is linked to all seated Blocks which the ticket could be assigned to (Venue Configuration Blocks Step 3)
- **Series.** Use the magnifying glass to look up and select the Series the Fixture Tickets can be printed for.
- **Category.** Use the magnifying glass to look up and select an appropriate Category, or alternatively create a new one.
- **Variant.** Add a single Variant of any Variant Type.
- Do not link the Bookable Product to a **Channel** or **Variant Price List.**

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

Examples Of a Bookable Product form Created

The below table shows the fields that have been completed when createing a Bookable Product for Fixture Tickets.

Record Type	Name	Type	Match Sit Anywhere	Beneficiary	Bookable Resource	Series	Category	Variant
Bookable Product	Fixture Ticket-Seated	Fixture	Yes	Required	All Seated Blocks	Sporting Green 4 Season Ticket	Fixture Ticket	Each

PRINTING INDIVIDUAL FIXTURE TICKETS FOR A SERIES CHECKLIST

Task	Completed?	Comments
1. Set the Channel to accept Upgrades/Moves		Ensure **Allow Series Seats to be Changed** has been set to **Yes** in the Channel
2. Create a Fixture Ticket Bookable Resource		Create a Bookable Resource which will be connected to Venue Configuration Blocks to hold all Seated or Unseated Blocks. Two Bookable Resources will need to be created if there are both Seated and Unseated Blocks in the same Venue.
3. Add the Venue Configuration Blocks		Linked to the Bookable Resource. Ensure a Venue Configuration Block has been created for each Block-Seat Class combination found in the system.
4. Create a Fixture type Bookable Product		Ensure the **Type** is **Fixture** Ensure **Match Sit Anywhere** is set to **Yes.** Ensure **Beneficiary** is set to **Required.** Ensure the **Bookable Resource** from Step 2 has been added Ensure the **Series** the Fixture Ticket can be printed for has been added. Ensure a **Category** has been selected. Ensure a **Single Variant Type** has been added Do not link the Bookable Product to a **Channel** or **Variant Price List.**

3.15. ALLOWING PARTIAL SERIES SALES

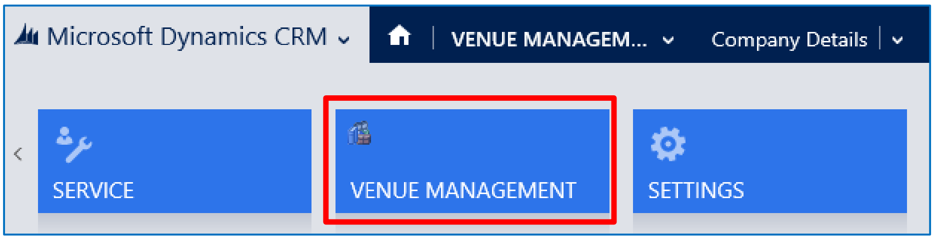
It is possible to allow a customer to purchase a Series ticket when the seat they have requested is not available for all Fixtures in the Series. When the customer attempts to purchase the Series ticket, they will be warned which Fixtures the selected seat is unavailable for. When a customer purchases a Partial Series, they will be issued with a Coupon to purchase a ticket for any matches that their Season Ticket is unavailable for.

To allow Partial Series sales carry out the following steps.

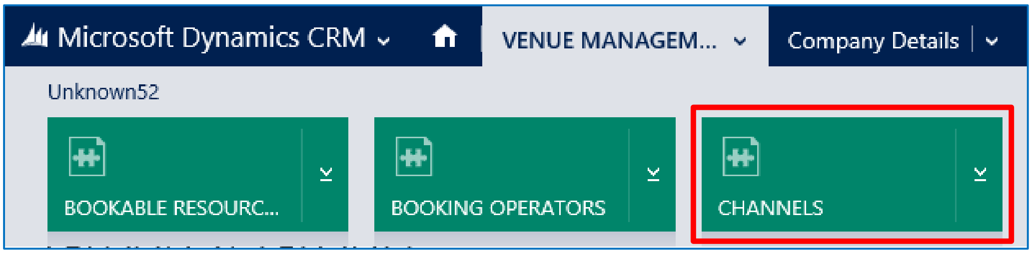
STEP 1: ALLOW PARTIAL SERIES ON THE CHANNEL

In each Channel where a Partial Series can be sold the following settings must be completed.

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 Channel that is to Allow Partial Series Sales.

d) Within the Channel form, ensure the following field has been completed.

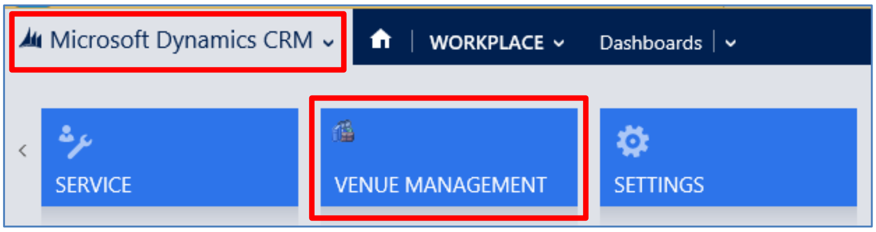
- **Allow Partial Series.** Select **Yes.**

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

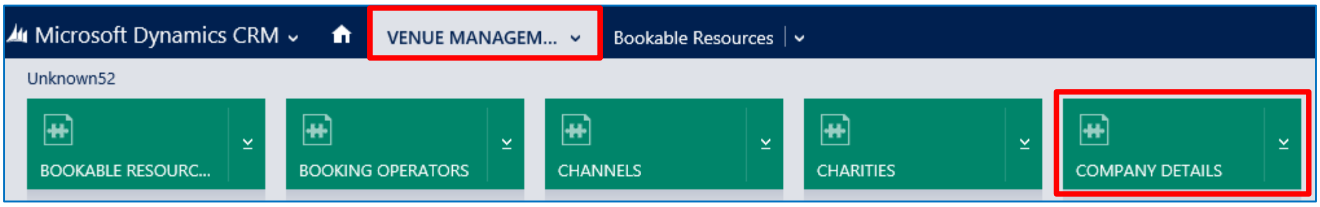
STEP 2: SET COMPANY DETAILS TO ACCEPT COUPONS

The Company Details form must have been set up for the system to Accept Coupons. To do this the following instructions must have been completed:

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 **Company Details.**



c) The Active Company Details page will be shown. Select and open the Company Details form.

d) Within the Company Details form, ensure the following field has been completed.

- **Use Coupons**. Select to **Yes.**

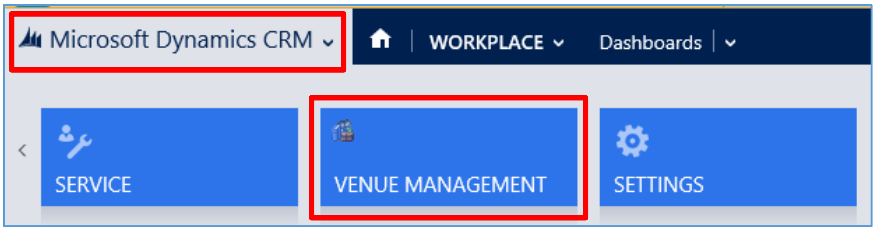
e) Select the **save** icon in the bottom right hand corner of the form.

STEP 3: SET UP THE COUPON CATEGORY

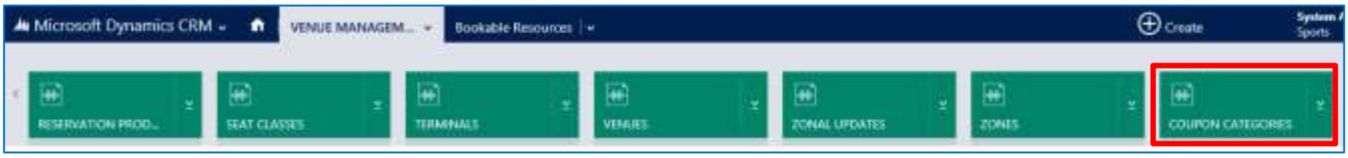
A Coupon Category must be created to essentially hold all Coupons related to a particular area. Coupon Type will be held under the relevant Category.

To create a new Coupon Category, complete the following:

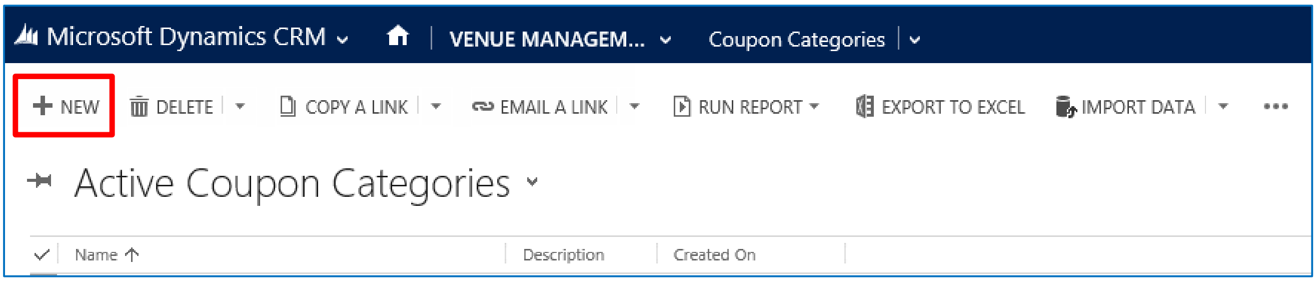
a) Within CRM, select the **Microsoft Dynamics CRM** tab in the navigation bar before scrolling across and choosing **Venue Management** from the drop down.



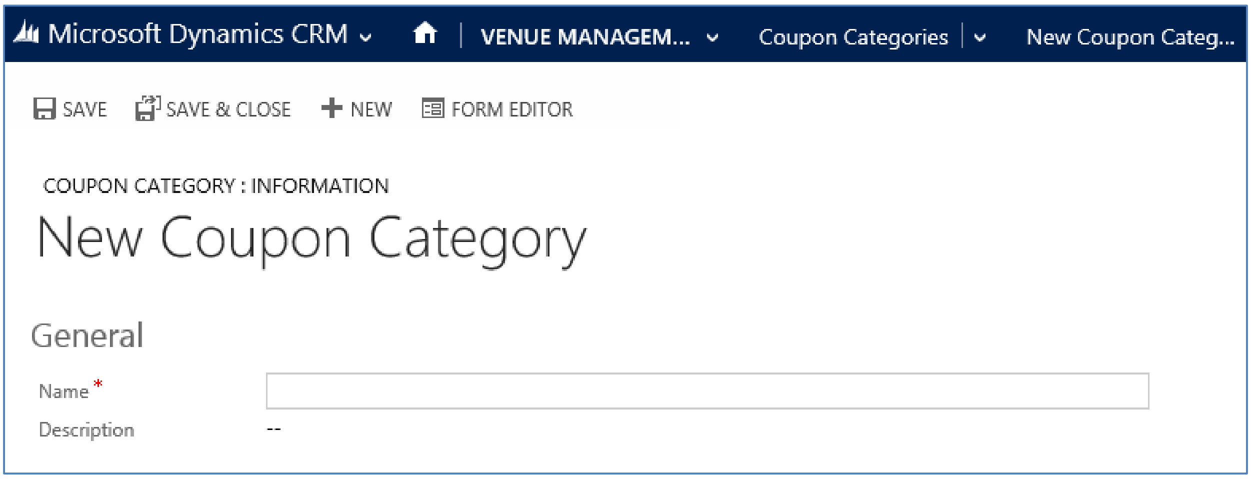
b) Next select the **Venue Management** tab in the navigation bar and from the drop down, scroll across and choose **Coupon Categories.**



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



d) A new Coupon Category form will be displayed complete the following details:



- **Name.** Enter a name for the Coupon Category.
- **Description.** Enter a description for the Coupon Category.

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

Example Of a Coupon Category Record Created

The example below shows the mandatory fields that have been completed within a Coupon Category form for the purpose of demonstration in this document.

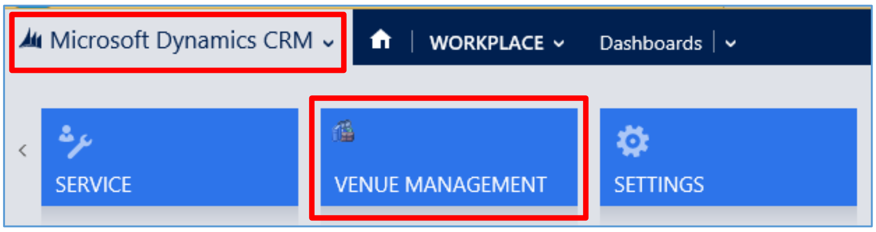
Record Type	Name	Description
Coupon Category	Match Ticket Coupon	A Coupon Category to hold all Match Ticket Coupons

STEP 4: SET UP THE COUPON TYPE

The Coupon Type is where the current deal for the Coupon is set up, for example, the redeem by date and other important information regarding the use of the Coupon. Coupon types are held within Coupon Categories as discussed in Step 3.

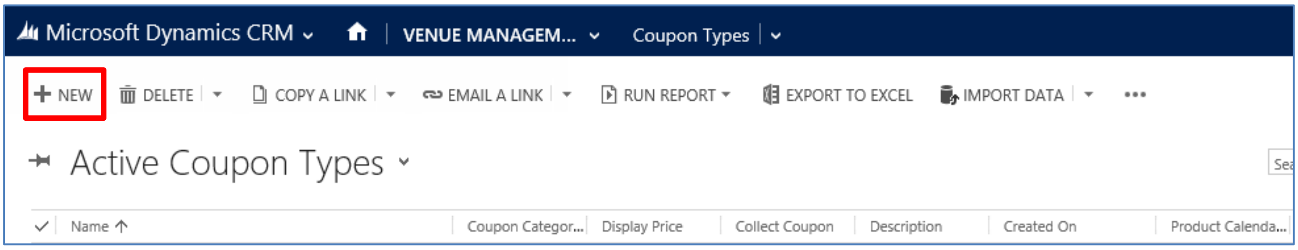
To create the Coupon Type, the instructions below must be completed:

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

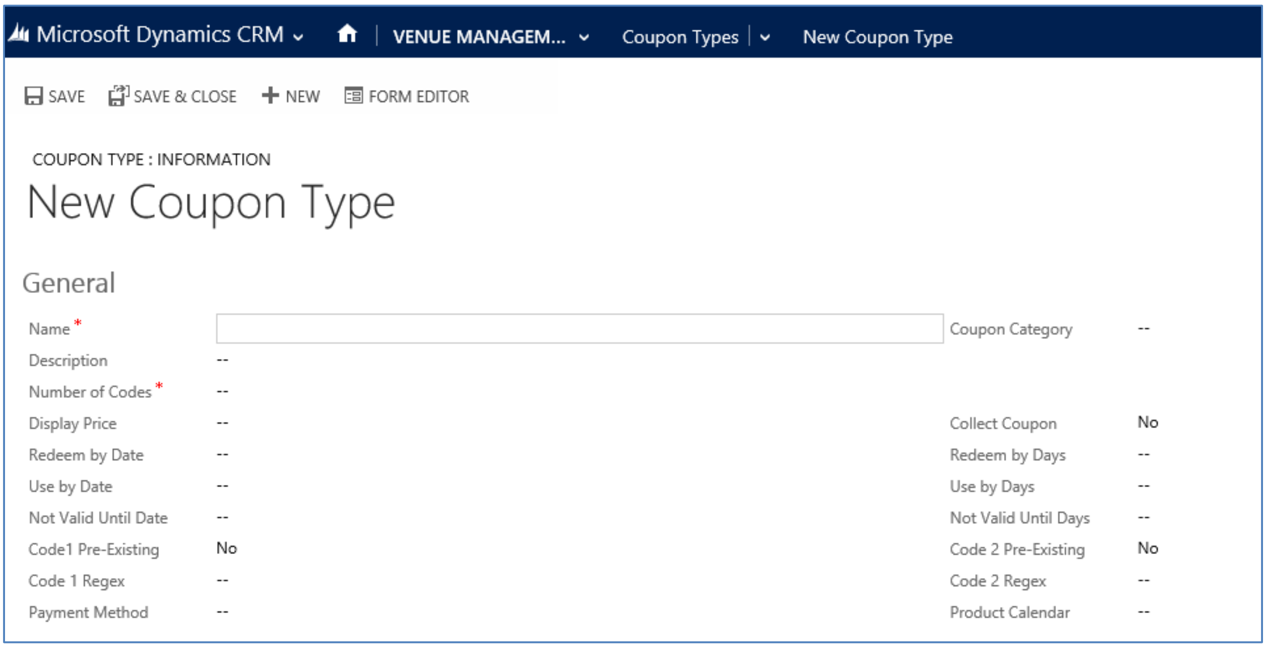


b) Next select the **Venue Management** tab in the navigation bar and from the drop down, scroll across and choose **Coupon Types.**

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



d) A new Coupon Type form will be displayed, complete the following details.



- **Name.** Enter a name for the Coupon Type.
- **Description.** If applicable, enter a description for the Coupon Type.
- **Number of Codes.** Enter the number of coupon codes to be collected. Options available are 1 or 2.
- **Display Price.** If applicable, enter the display price for the Coupon.
- **Redeem by Date.** If applicable, enter the date the Coupon must be redeemed by. If a date is entered, once the date has passed any Coupons that have not been redeemed will be marked as expired.
- **Use by Date.** The Coupon will only be valid prior to the use by date. If applicable, enter the date that unused Coupons will be marked as expired once this date has passed.
- **Not Valid Until Date.** The coupon cannot be redeemed before the not valid until date. Used for coupons sold externally.
- **Code 1 Pre-Existing.** Select **Yes** if the coupon code 1 pre-exists and is not matched based on a regex.
- **Code 1 Regex.** If a regex is used to validate the Coupon Code entered, enter the details
- **Payment Method.** If applicable, enter the payment method to be used to process Coupon redemptions (e.g. set up a coupon payment method).
- **Coupon Category.** Select the Coupon Category, which the Coupon Type is to be held under. Information on creating a Coupon Category can be found in Step 3. Creating Coupon Category.
- **Collect Coupon**. Select **Yes** if the Coupon has to be collected from the customer. This will prompt the operator to collect a Coupon from the customer when the booking is made.
- **Redeem by Days.** If applicable, enter the number of days in which the coupon must be redeemed. Unused coupons will be marked as expired once the number of days has passed.

- **Use by Days.** The coupon will only be valid for this many days after the sale date. If applicable, enter the number of days that unused coupons will be marked as expired once the entered number of days has passed.
- **Not Valid Until Days.** The coupon cannot be redeemed until this many days after the sale. If applicable, enter the correct number of days.
- **Code 2 Pre-Existing.** Select **Yes** if the coupon code 2 pre-exists and is not matched based on a regex.
- **Code 2 Regex.** If a regex is used to validate the coupon code entered, enter the details.
- **Product Calendar.** If applicable, use the Look Up Records dialog to select the **default** product calendar.

e) Once the details are complete, select **Save** on the ribbon but leave the form open.

Example Of a Coupon Category Record Created

The example below shows the fields that have been completed within a Coupon Type form that has been created for the purposes of demonstrating in this document. Please note that no Redeem by Date/Days or Use by Date/Days have been entered, meaning this Coupon will not expire.

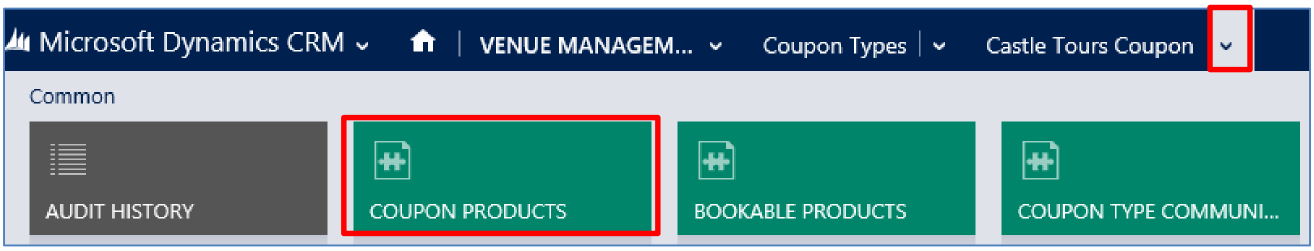
Record Type	Name	Description	Number of Codes	Code 1 Pre-Existing	Coupon Category	Collect Coupon	Code 2 Pre-Existing
Coupon Type	Match Ticket Coupon	A coupon that can be redeemed for a match ticket	1	Yes	Match Ticket Coupon	No	No

STEP 5. CREATING THE COUPON PRODUCT

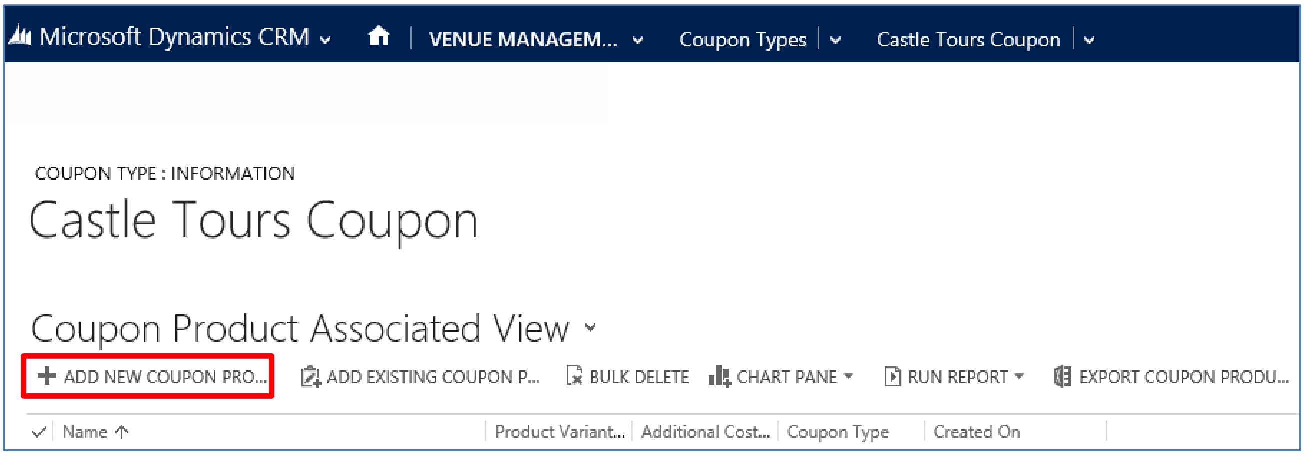
The Coupon Product is where the Product Variant that can be purchased via the use of the Coupon is setup. Multiple Coupon Products can be added to be used against one Coupon Type, this would be necessary if the Coupon applies to more than one Product Variant.

To set up the Coupon Product the steps below must be followed:

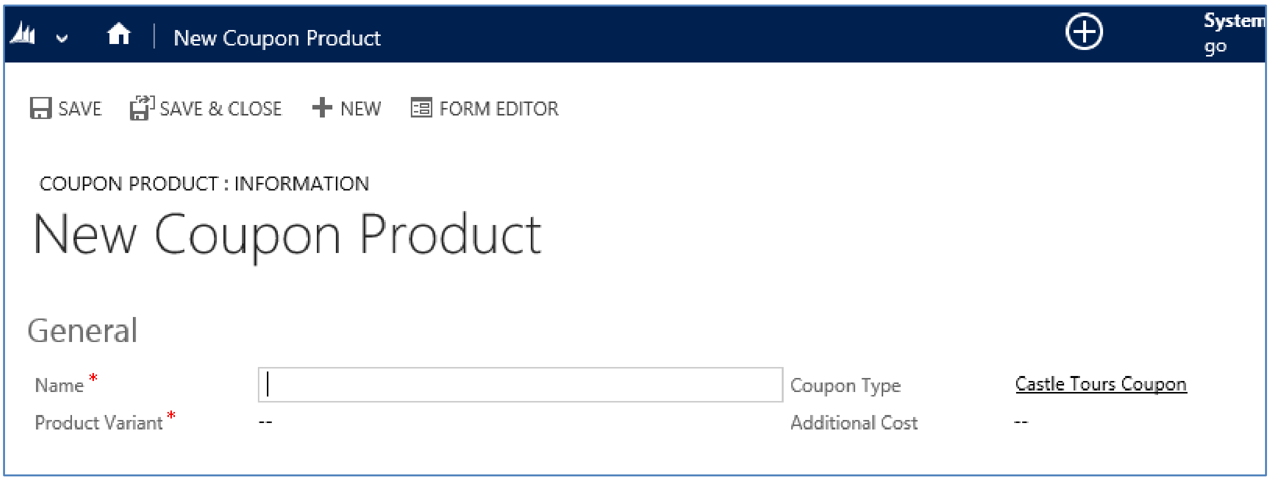
a) With the Coupon Type form still open, select the small arrow next to the name of the Coupon in the navigation bar and from the drop down list choose **Coupon Products.**



b) The Coupon Product Associated View will be displayed, select **Add New Coupon Product**.



c) A new Coupon Product form will be displayed, complete the following:



- **Name.** Enter a name for the Coupon Product.
- **Product Variant.** Select the magnifying glass to look up and select the Product Variant the customer will be able to purchase with the Coupon. E.g. a Fixture ticket.
- **Coupon Type.** The Coupon Type field will be automatically completed.

- **Additional Cost.** Enter the additional cost for the product variant. In this instance enter 0 as the customer will not be expected to pay extra for the fixture ticket.

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

Example Of a Coupon Product Record Created

The example below shows the Coupon Products that have been setup and the fields that have been completed within their form. These have been created for the purpose of this document. Please note that a new Coupon Product needs creating for each Product Variant that the Coupon applies to.

Record Type	Name	Product Variant	Coupon Type	Additional Cost
Coupon Product	Match Ticket- Partial Series (Adult)	League Fixtures (Adult)	Match Ticket Coupon	0.00
Coupon Product	Match Ticket- Partial Series (Junior)	League Fixtures (Junior)	Match Ticket Coupon	0.00

STEP 6: CREATE THE BOOKABLE PRODUCT

It is essential to create a Coupon type Bookable Product, as this will control the cost of the Coupon and the sales Channels the Coupon will be available on.

It is assumed that the following items have been set up in CRM before creating the Bookable Product:

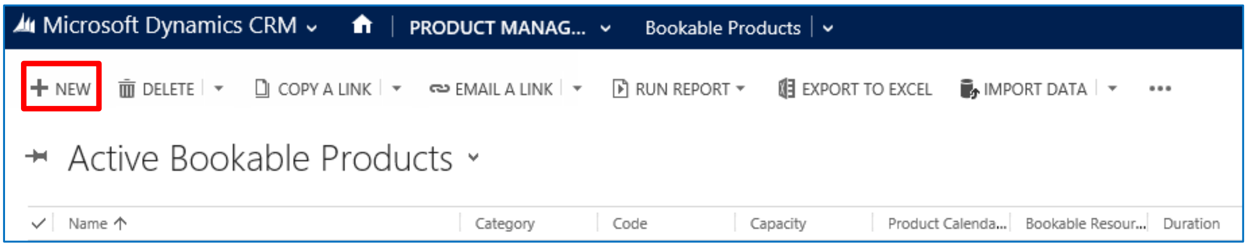
- **Channels.** The Channels the products will be sold on. For more information see the Go CRM 2015 Infrastructure Setup User Guide.
- **Variant Types.** For more information see the Go CRM 2015 Product Management User Guide.
- **Variant Price List.** The Variant Price List is selected in the Variant and Pricing section of the Bookable Product form, 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. For more information see the Go CRM 2015 Product Management User Guide.
- **Sales Plan and Channel Price Lists.** A default Sales Plan of type Other with a linked Channel Price List is required. For more information on these see the Go CRM 2015 Product Management User Guide.

To set up a Coupon type Bookable Product, do the following:

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

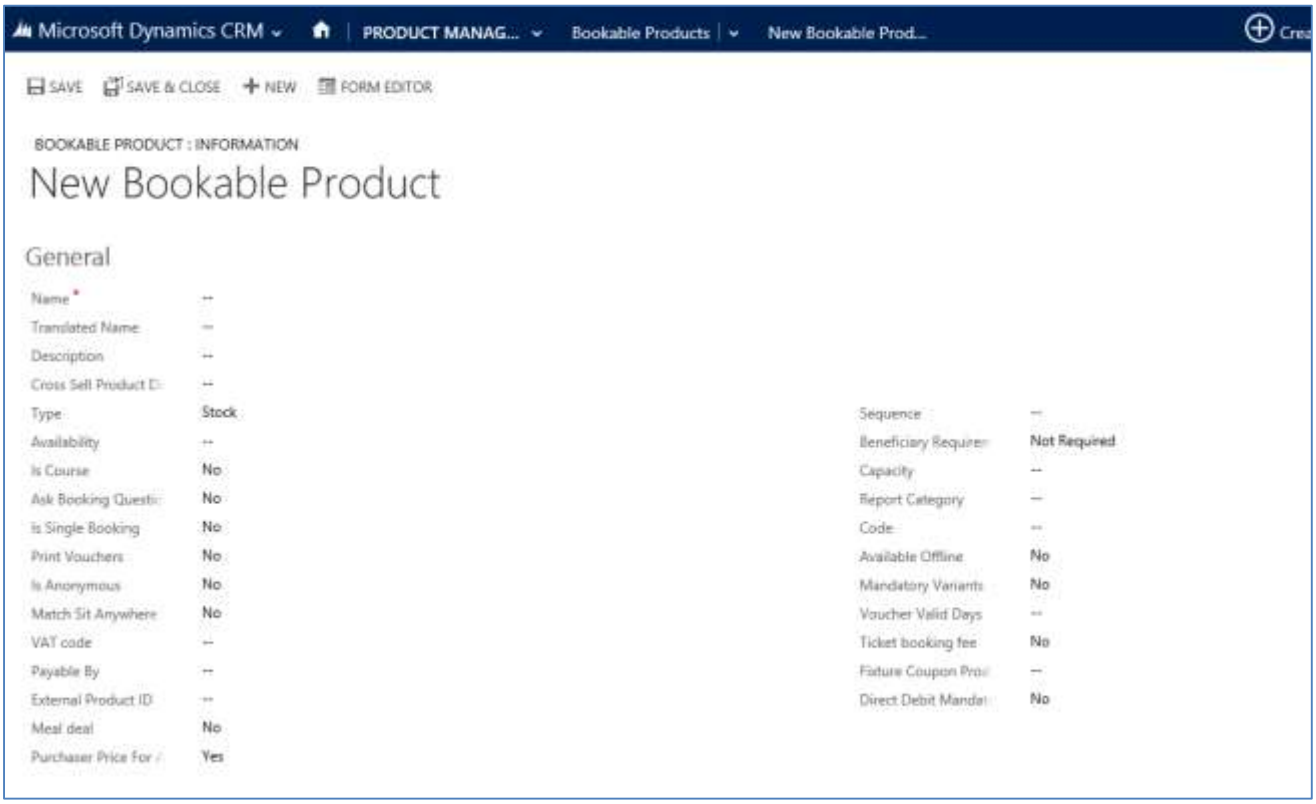
f) Next, in the Product Management area of CRM, select the **Product Management** tab before selecting **Bookable Products** from the drop down.

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



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

Note: The fields not listed below do not need to be changed and can be left in their default stage.



General:

- **Name.** Enter a name for the Coupon product. The name will be visible to customers, and should therefore reflect the nature of the product.
- **Translated Name**. This field is used for translated implementations, more information on this can be found in the Go CRM 2015 Product Management User Guide.

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

Referring Entities:

- **Category.** Use the Look Up dialog to select the Product Category. The category is used to group products.
- **Product Calendar.** Select the default product calendar.
- **Coupon Type.** Use the Look Up Records dialog to select the [Coupon Type] previously set up, see Step 4 for more details.

Time Settings:

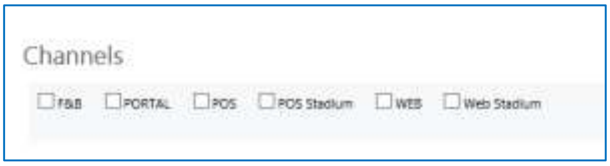
- **Available Date From.** Enter the date the product goes on sale.
- **Available Date To.** Enter the date the product is removed from sale
- **Available Time From.** Enter the time the product goes on sale.
- **Available Time To.** Enter the time the product is removed from sale.

i) When the details are complete, select **Save** on the ribbon.

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

ix. Scroll down to the Channels section of the Bookable Product form

x. The Channels set up during the configuration of your system will be listed. Select the checkbox alongside each Channel through which the product will be sold.

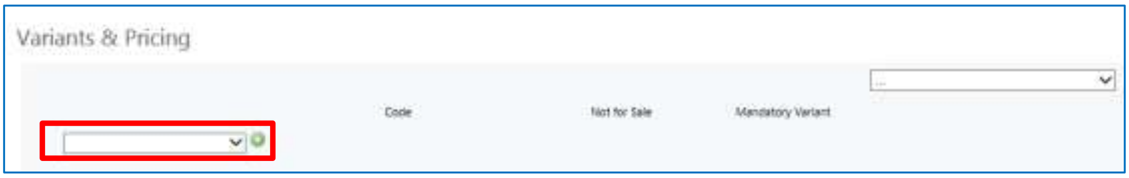


xi. Select **Save** on the ribbon.

g) Next, it is necessary to identify the Product 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 be displayed in the relevant categories.

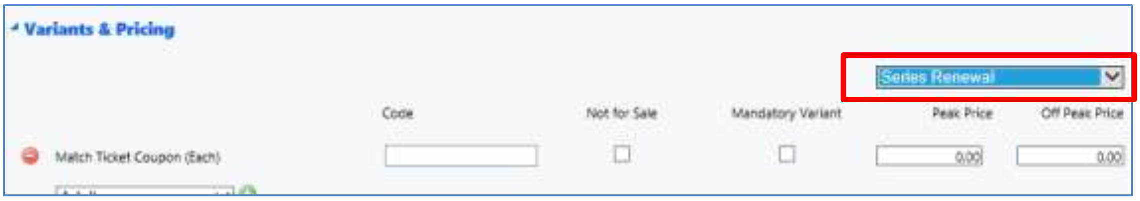


iii. Select the green cross alongside the Variant name to add a new Variant. The Variant of Each should be chosen.

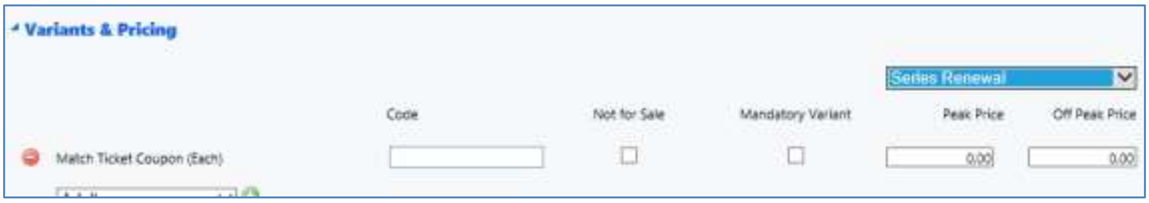
Note. Once a Variant is sold it can then not be removed from the Variant and Pricing list. Therefore ensure the correct Variants are set up for your product before you begin to sell them.

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

vii. Select the relevant Variant Price List from the drop down at the right hand side of the Variants & Pricing section (highlighted below).



viii. Peak Price and Off Peak Price fields will appear upon 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. For this setup the price of 0.00 should be entered as there should be no cost for the Coupon that is to be exchanged for a match ticket.



Note: The Variant Price List of the Fixture ticket associated to the Coupon must exist as a Channel Price List in the Other type Sales Plan.

i) 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 products should appear for sale in the selected Channels.

Example Of a Coupon type Bookable Product Record Created

The example below shows a Coupon type Bookable Product that has been setup and the mandatory fields that have been completed within the form.

Record Type	Name	Type	Coupon Type	Category	Product Calendar	Available Date From	Available Date To	Channels	Variants	Variant Price List	Pricing
Coupon type Bookable Product	Match Ticket Coupon	Coupon	Match Ticket Coupon	Coupons	Standard Colander	13/05/2015	01/06/2015	POS	Each	Coupon Price List	0.00

STEP 7: UPDATE THE SERIES PRODUCT

Finally the Coupon product must be linked to the Series type Bookable Product. This can be done by completing the following instruction:

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 and open the appropriate Series type Bookable Product.

d) With the Series type Bookable Product form open, complete the following field:

- **Fixture Coupon Product.** Select the magnifying glass to look up the Coupon type Bookable Product created in the previous step.

c) Select the **save** icon in the bottom right hand corner of the screen.

ALLOWING PARTIAL SERIES SALES CHECKLIST

Task	Completed?	Comments
1. Set the Channel to allow Partial Series Sales		Ensure the **Allow Partial Series Sale flag** has been set to **Yes** on the appropriate Channel form.
2. Set the Company Details to accept Coupons		In the **Company Details** form ensure that the Use Coupons option is set to **Yes.**
3. Created the Coupon Category		This should be given a name linked to what the Coupon is to be used for. All Coupons linked to this name can be held under this Coupon Category.
4. Created the Coupon Type		Ensure the **Coupon Category** that was previously created is entered Ensure the Number of Codes field is entered with either 1 or 2 Ensure the various relevant Coupon dates have been entered that control the Coupons availability
5. Created the Coupon Product		Ensure a Product Variant has been entered which will then be available to purchase with the use of a Coupon.
6. Created the Coupon type Bookable Product		Ensure the Bookable Product type selected is **Coupon** Ensure a **Category** and **Product Calendar** have been entered Ensure that the Coupon **Type** previously created is entered Ensure the relevant **Channel** check boxes are ticked Ensure a **Variant** of Each has been added. Prices of 0.00 should be added to an active **Variant Price List** that has been linked to a **Channel Price List**.
7. Update the Series Product		Ensure the **Fixture Coupon Product** field has the Coupon Type entered.

3.16. PRIORITY PROVIDERS

The Priority Provider functionality has been developed to enable specific Fixtures or Series to be sold to customers who have provided evidence that they are associated with, or a member of, a particular organisation (Priority Provider). When the customer has proved that they have an association with a Priority Provider, the product can be sold to the customer, often at a preferential price.

For example, the client might only want to sell a Fixture to a customer if they can provide evidence that they are also a Sky TV customer. During the sales process, the customer will have to provide a Sky TV membership number, at the point of adding the Fixture to the shopping cart. If they cannot provide a valid Sky TV membership number, they will not be allowed to purchase the associated Fixture.

PRIORITY PROVIDER CRM SETUP

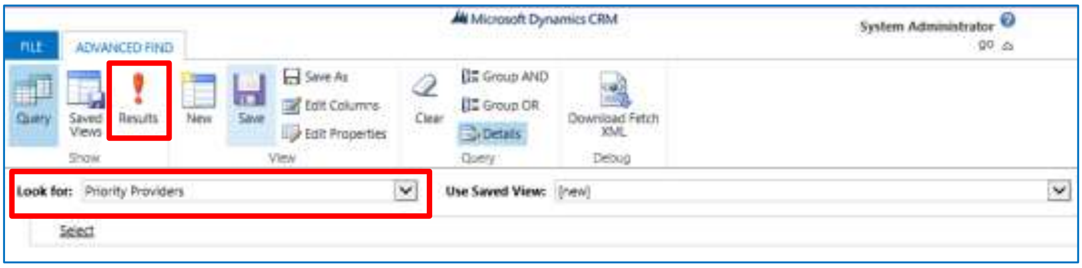
The steps below outline the instructions that must take place in order to set the Priority Provider up within CRM. Firstly the Priority Provider must be created before it can be associated to a Channel Price List.

STEP 1. CREATE THE PRIORITY PROVIDER

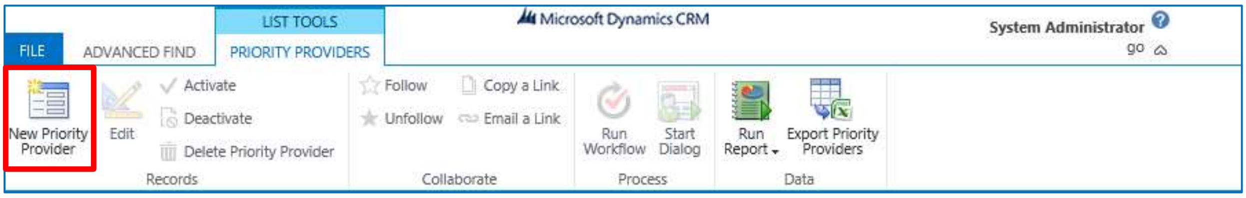
Each Priority Provider must be set up in CRM, this can be done by completing the following:

a) Within the Workplace area of CRM, select the **Advanced Find** icon in the navigation bar.

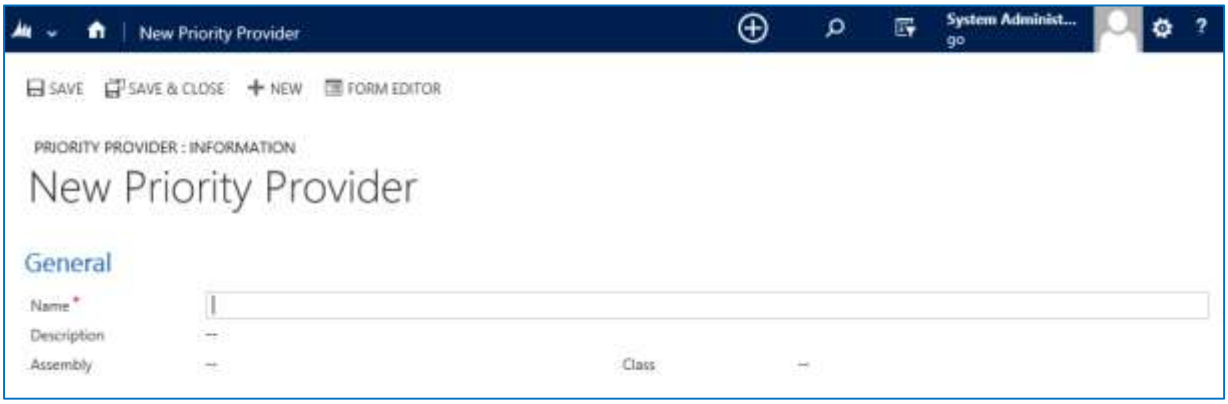
b) The Advanced Find window will open, from the **Look for** drop down select **Priority Providers** before choosing **Results** in the ribbon.



c) Any existing Priority Providers will be displayed, to create a new one select **New Priority Provider** in the ribbon.



d) A New Priority Provider form will open, complete the following details:



- **Name.** Enter a name for the Priority Provider
- **Description.** Enter a description of the Priority Provider.
- **Assembly.** Enter an Assembly value that must exactly match the software module name which has been provided as the Priority Provider.
- **Class.** Enter a Class value that must match the name of the Class within the Assembly.

e) Upon completing the details, select **Save and Close** in the ribbon.

Example of a Priority Provider created

A Priority Provider has been created as an example for this document. The fields that have been completed are highlighted in the table below.

Record Type	Name	Description	Assembly	Class
Priority Provider	Green4.PriorityProviders.DirectTV	Direct TV Priority Provider Class	Green4.PriorityProviders	DirectTV

STEP 2. ASSOCIATE THE PRIORITY PROVIDER TO ONE OR MORE CHANNEL PRICE LISTS

Each Priority Provider requires one or more Channel price Lists to be associated with it. This can be done by completing the following instructions within CRM:

Note. The Sales Plan for the Channel Price List must be of the type **Fixture** or **Series.** The Fixtures or Series must also use this Channel Price List.

This section assumes that the relevant Channel Price Lists have already been created.

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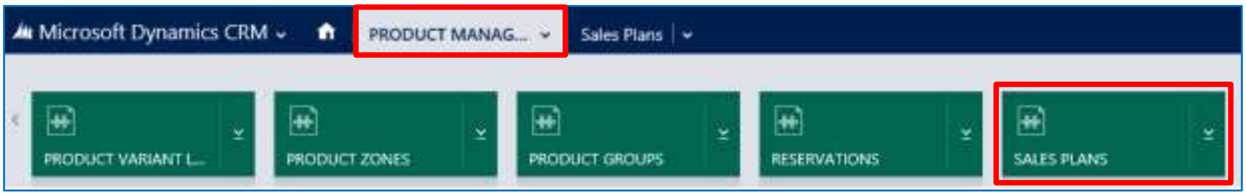
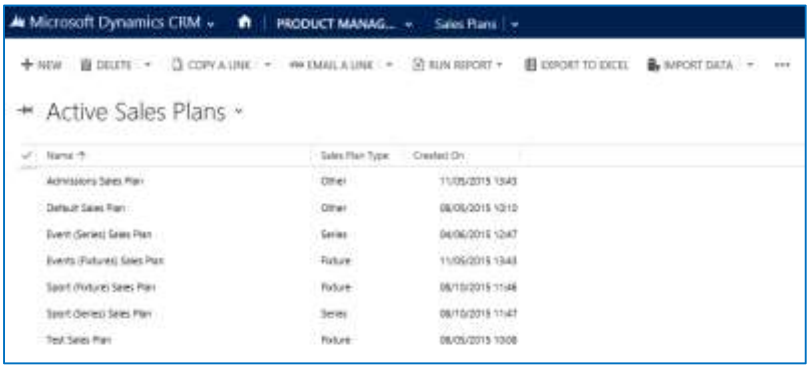
a) Select the **Microsoft Dynamics CRM** tab in the navigation bar and from the drop down choose **Product Management**.

b) Select **Product Management** in the navigation bar and from the drop down scroll across and select **Sales Plans**.



c) The Active Sales Plan view will be displayed. Select the appropriate **Fixture** or **Series** type Sales Plan that the Channel Price Lists which the Priority Provider is to be associated to is held under.



d) Within the Sales Plan form, select the small arrow in the navigation bar next to the name of the Sales Plan and from the drop down choose **Channel Price Lists**.

e) The Channel Price List Associated View will be displayed showing all Channel Price Lists linked to the Sales Plan. Select and open the Channel Price List which the Priority Provider is to be linked to into form view.

f) With the Channel Price List open in form view ensure the following field has been completed:

- **Priority Provider.** Use the magnifying glass to search and lookup the Priority Provider (Created in Step 1).
- **Max Quantity.** The Max Quantity field must be set to a value of 1 or more.

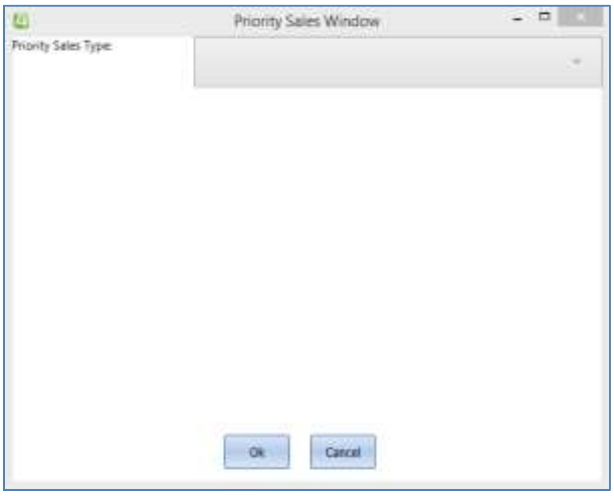
Note. The Variant Price List associated with the Channel Price List can contain discounted prices which are available to the customer (associated with the priority provider)

g) Select the **Save** icon the bottom right hand corner of the screen. Repeat this step to associate a Priority Provider to any further Channel Price Lists.

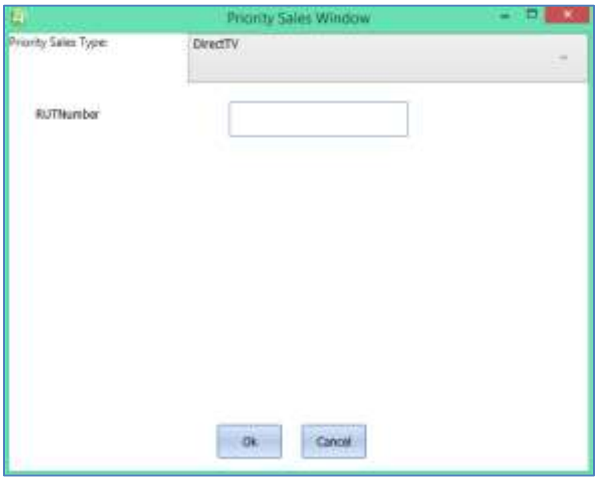
PRIORITY PROVIDERS ON THE POS

The following instructions describe how the Priority Providers functionality works on the POS after setup has taken place within CRM.

a) At the point of adding the Fixture/Series that is using the Channel Price List that the Priority Provider is linked to, the Priority Sales window will appear:



b) Select the **Priority Sales Type** from the drop down. The drop down will contain a list of the Priority Providers which have been set up for the selected Fixture/Series (usually this will only be one).



c) When the Priority Provider has been selected, a text-box input will appear with a prompt to enter a Reference/Membership/ID Number.

d) Once a value has been entered, select the **Ok** button. The process will then try and validate the value entered by either calling an external system or another mechanism will run which will dictate whether the customer can purchase the product. If the validation is accepted the Priority Sales Window will close and the product will be added to the shopping cart. Alternatively if the validation fails, a message will be displayed to indicate why the validation has failed.

4. MISCELLANEOUS

THE BULK SET UP OF MANY PRODUCTS

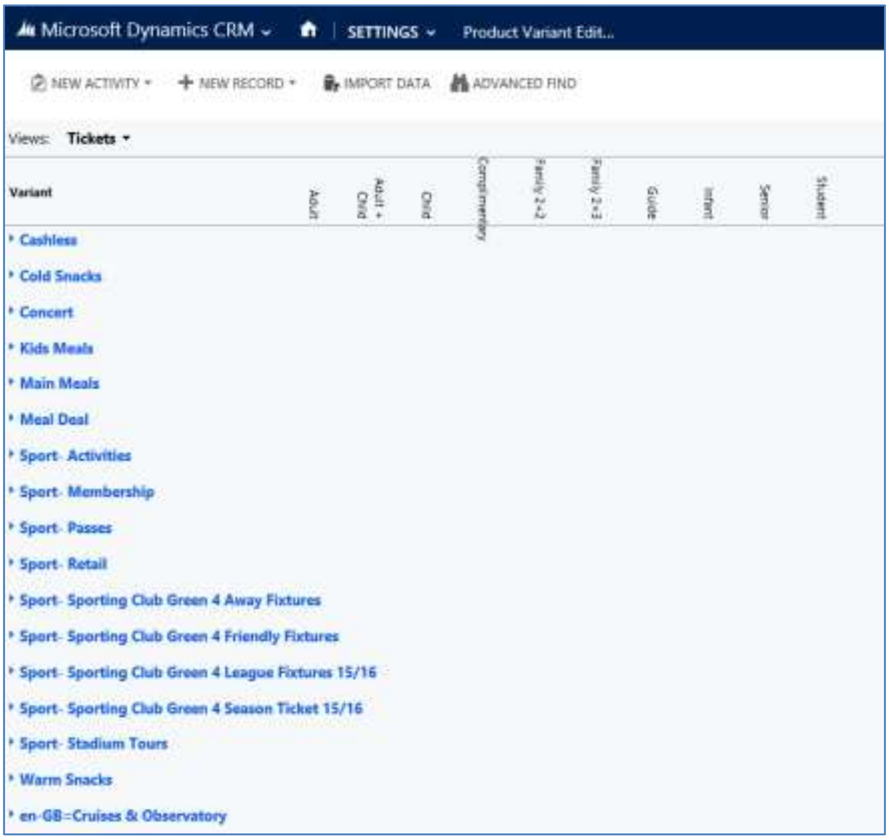
The setup of Variant Types and Pricing for many products at once is done using the Product Variant Editor.

To do this complete the following.

a) Select the **Microsoft Dynamics CRM** tab before choosing **Settings** from the drop down.

b) With the Settings area open choose Settings in the Navigation bar and from the drop down select **Product Variant Editor.**

c) The Product Variant Editor will be displayed:



d) The Bookable Products will be listed down the side of the editor. The products are grouped based on product category.

e) The Variant Types will be listed across the top of the editor. The variant types listed can be changed using the Views drop down. If the required variant type is not available for the Bookable Product, contact your system administrator to request the creation of the variant type.

f) To set a variant type for a Bookable Product, enter a tick in the relevant checkbox.

g) Once the details are complete select **Save** at the top of the editor.

SET UP FOR MULTI LINGUAL USING THE TRANSLATION FIELD

If the website is being setup as multi-lingual the translated names will be entered here in the following format. These translated names will appear on the website when the different language selection is made on the website.

fr-FR=	'Product Description' – 'Price'	|	en-GB=	'Product Description' – 'Price'
Country/ Language	The product description and Price	Separator	Country/ Language	The product description and Price

Example E.g. *fr-FR= Cartable Double Soufflet - €120* |*en-GB= Double Gusset Briefcase - €120 -* |*en-ES= Cartera con dos compartimentos - €120*Description (this appears online under the product)

PRODUCT CALENDARS

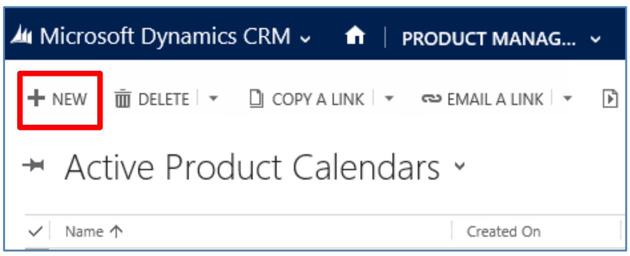
The Product Calendars entity is used to determine the availability of products, for example they are used to define peak and off peak schedules.

To create a Product Calendar record:

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) Choose the **Product Management** tab in the Navigation bar and from the drop down, select **Product Calendars.**

c) The Product Calendars list view will be displayed. Select **New** on the ribbon.



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

- **Name.** Enter a name for the calendar.

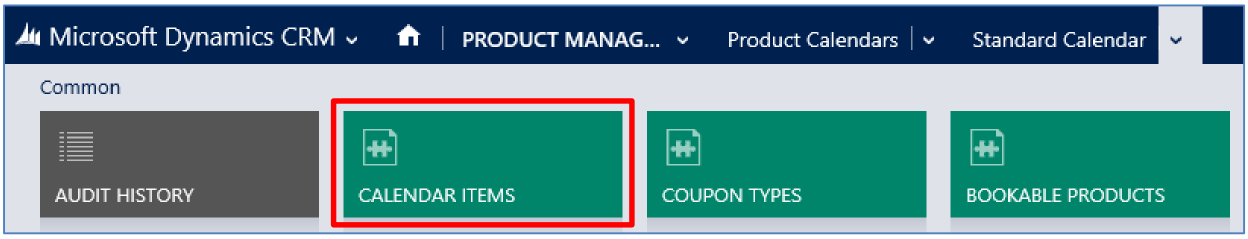
e) Once the details are complete click **Save** on the ribbon to continue and then add the Calendar Items.

Calendar Items

The Calendar Items entity is used to define the individual time periods (e.g. days or weeks) included in a Product Calendar.

To create a Calendar Items record:

a) With the **Product Calendar** open in the form view (see Product Calendars for details) select the small arrow next to the Calendars name in the Navigation bar. Then from the drop down choose **Calendar Items.**



b) The Calendar Items list view will be displayed. Select **Add New Calendar Item** on the ribbon.

c) A blank Calendar Item form will be displayed, complete the following details.

- **Name.** Enter a name for the Calendar Item. For example if creating a standard day enter the name of the day: Monday, Tuesday, etc., or, if creating a bank holiday enter the name of the holiday, e.g. Easter Monday.
- **Type.** Use the drop-down list to select the type of calendar item. Select from:
    i. **Include.** Select if you creating a standard calendar item, for example a normal day of the week.
    ii. **Exclude.** Select if you are creating a holiday item when the venue is closed, for example Christmas Day.
    iii. **Override.** Select if you are creating a holiday item when the venue is open, but the standard settings are to be overridden by the calendar item, for example altered opening hours on Christmas Eve.
- **Description.** Enter a description of the item.
- **Start Date.** Enter the date when the calendar item comes into effect. For example if creating an item to cover the school holidays, enter the first date of the holidays.

- **End Date.** Enter the date when the Calendar Item becomes obsolete. For example if creating an item to cover the school holidays, enter the last date of the holidays. If this field is left blank the item will be used indefinitely.
- **Day of Week.** Use the drop-down menu to select the day of the week. Use this option when creating the standard days of the week calendar items.
- **Product Calendar.** The product calendar the calendar item is associated with.
- **Open Time.** Enter the time the venue opens on the day(s) that are being defined.
- **Close Time.** Enter the time the venue closes on the day(s) that are being defined.
- **Peak Start Time.** Enter the start of peak time on the day(s) that being defined. This setting will be used to determine whether customers pay the peak or off peak price for bookings.
- **Peak End Time.** Enter the end of peak time on the day(s) that being defined. This setting will be used to determine whether customers pay the peak or off peak price for bookings.

d) Once the details are complete select **Save and Close** on the ribbon to continue.

Note: The above process should be used to create a calendar item for each day your venue is open. In addition you should create a separate calendar item for any day(s) that do not follow your normal opening or pricing details.

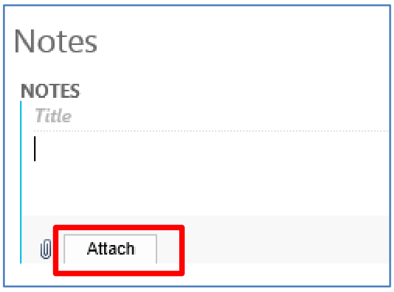
ADDING AN IMAGE TO A BOOKABLE PRODUCT

It is possible to add images to a Bookable Product form to represent the product that is being sold, for example event logos or team emblems, if creating a Series or Fixture Bookable Product. If added these will be displayed on the website when customer's view the list of available products. You can add two images to the Fixture, one for the home team and one for the away team. The images used must be 100px x 100px and either a .jpg or .png file. The background of the images used should be either transparent or match the background colour of your ticketing website.

Note. The name of the attachment and note must match the configuration defined for your organisation's web site (or RSS site). If you encounter problems please contact your system administrator or the Green 4 support team.

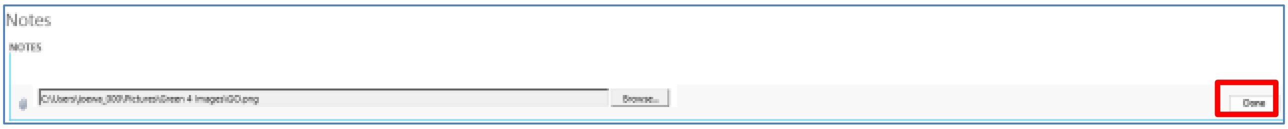
To add an image, complete the following:

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

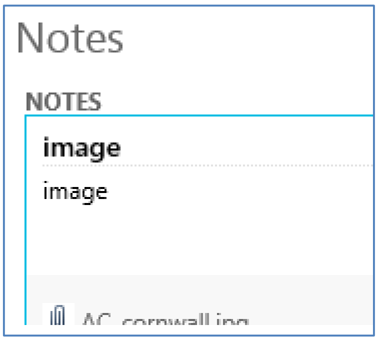


b) Select the **Attach** button and then **Browse** to search for the image file before selecting it.

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.

**** End of Document ****