



CRM 2015
PROMOTIONS,
COUPONS &
VOUCHERS
SETUP
USER GUIDE

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ABOUT THIS DOCUMENT

This document has been prepared as a User Guide for the Go Promotions, Coupons and Vouchers functionality.

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DOCUMENT CONTROL

Version	Date	Change	Initials
V1.0		This is a new document	JW

CONTACT

Any correspondence should be addressed to:

Product Development

Green 4 Solutions Limited

16-17 Midland Court

Central Park

Lutterworth

Leicestershire

LE17 4PN

UK

Phone: +44 (0) 845 508 8149

Email: support@green4solutions.com

Web: www.green4solutions.com

INTRODUCTION

Promotions, Coupons and Vouchers from Go allows the organisation to offer a number of different options to target both new and existing customers in a controlled and manageable manner. By offering Promotions, Coupons and Vouchers, customers are encouraged to take advantage of these offers, with the added benefit of capturing customer data quickly and efficiently when they are redeemed. This can therefore turn a person who has taken advantage of a Promotion, Coupon or Voucher into a named and engaged customer.

PROMOTIONS, COUPONS AND VOUCHERS



PROMOTIONS, COUPONS AND VOUCHERS

1. PROMOTIONS

Promotions can be setup to offer customers the chance to purchase a product at a special rate. To be able to do this the customer must have had access to a Promotional Code of which they can either enter themselves when purchasing on the Web or can be entered into the POS by the operator. Promotions can be set up to reduce the cost of either a booking or certain other product types (such as Fixtures and Series) by a percentage or actual monetary value.

2. COUPONS

Coupons make it possible to make an offer to a targeted and focussed customer. Coupons can then be redeemed in a controlled manner. They have no monetary value and can only be redeemed against defined activities, although they can also be purchased as a gift for others. Coupons can be set up to be sold both externally by 3rd parties such as Groupon or internally by the organisation. Coupons can also be set up so that they must be redeemed within a certain time frame.

3. VOUCHERS

Vouchers have a monetary value, for example a £10, £20 or £50 Voucher. These can be redeemed against a product that is being sold on your system. Vouchers can either be set up to be sold as a product or they can also be accepted as a Payment Method so that a unique Voucher code can be entered in the shopping basket to redeem its value.



Note: This document assumes that other entities have already been set up in your system such as Channels, Variant Price Lists, Sales Plans and Channel Price Lists. Information on each of these can be found in the Go CRM 2015 Infrastructure Set Up User Guide and the Go CRM 2015 Product Management User Guide.

1. PROMOTIONS

Promotions are created to offer customers a product at a special rate. Products applicable to a promotion include Fixtures and Series as well as Bookable Products. Promotions can be set up within CRM to offer both a percentage and monetary value off a particular product or booking. They can also be set up to be valid from and to a particular time period, meaning promotions can be created for particular days, weeks or months. To redeem a promotion, a customer or booking operator must enter a Promotional Code on the Web or Pos.

To create a promotion complete the following.

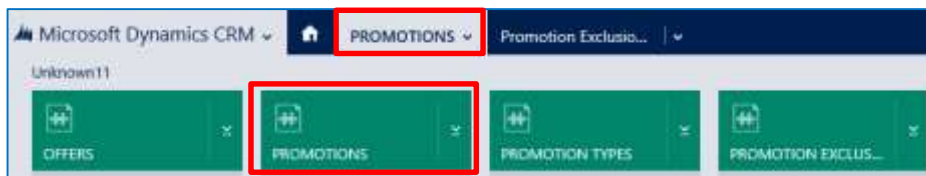
STEP 1. CREATING A PROMOTION

To create a Promotion, complete the following instructions within CRM:

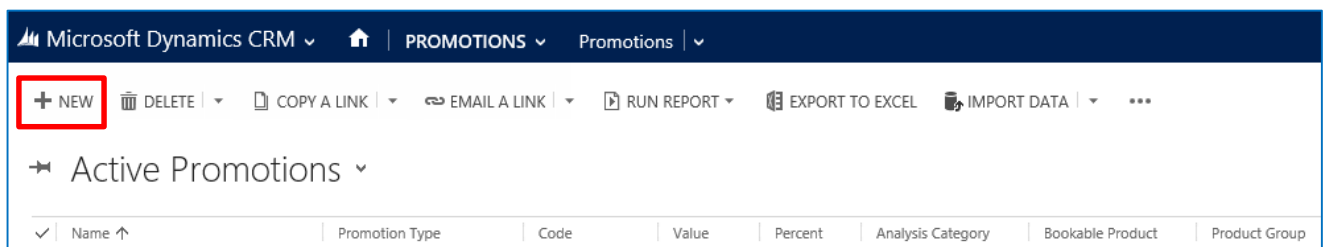
- Select or hover over the **Microsoft Dynamics CRM** tab before scrolling across the drop down list of the navigation bar and selecting **Promotions**.



- Next, select the **Promotions** tab in the navigation bar before choosing **Promotions** from the drop down.



- The Active Promotions view will be displayed, select **New** on the ribbon.



- A New Promotion form will be displayed, complete the following fields:

General:

- **Name.** Enter a name for the Promotion.
 - **Description.** Enter a description of the Promotion.
 - **Promotion Type.** Use the Look Up button to select the appropriate Promotion Type for example X% Off Booking. A Promotion Type must be added to the Promotion form.
- If a suitable Promotion Type does not exist, click the magnifying glass and from the drop down choose **New**. The Promotion Type form will be displayed. Complete the following details before selecting **Save and Close** to the Promotion form:
- **Name.** Enter a name for the promotion type.
 - **Description.** Enter a description for the promotion type.
 - **Sql.** Enter the sql query that will be used to apply the promotion to the customer's shopping cart.
- **Value.** Enter a monetary value for the Promotion. This field should only be used if the **Type** of Promotion is **Value of Booking** or **Value of Product**.
 - **Analysis Category.** Use the Look Up to select an Analysis Category for the Promotion to be a part of.
 - **Fixture.** If the Promotion is to be for a Fixture, use the magnifying glass to Look Up the records and select the Fixture associated with the promotion. This field can be left blank if the promotion is not aimed at a Fixture.
 - **Require Login.** Select **Yes** if the customer is required to log in to apply the Promotion code. This is applicable to Web Channels only.

- **Type.** Use the drop-down list to select the type of Promotion that is to be created. Select from the following options:
 - **% of Booking.** Select if the Promotion results in the customer receiving a discount with a defined percentage of the total value off the booking, for example 10% off the total value of the booking. This percentage is entered in the **Percent** field.
 - **Value of Booking.** Select if the customer is to receive a Promotion with a defined amount subtracted from the value of their booking. This amount is entered in the **Value** field.
 - **% of Product.** Select if the customer is to receive a discount with a defined percentage of the cost of a product, for example 10% off the cost of a Fixture. This percentage is entered in the **Percent** field.
 - **Value of Product.** Select if the customer is to receive a promotion with a defined amount subtracted from the value of their booking. This amount is entered in the **Value** field.
- **Code.** Enter the promotional Code. The Code will need to be entered by the customer on the Web or by the POS operator to receive their promotional discount.
- **Percent.** Enter a percentage value for the promotion. This field should only be used if the **Type** of Promotion is **% of Booking** and **% of Product**.
- **Bookable Product.** If the promotion is for a Bookable Product, select the magnifying glass to Look Up the records and select the Bookable Product associated with the Promotion. This field can be left blank if the promotion is not aimed at a Bookable Product.
- **Series.** If the promotion is for a Series, select the magnifying glass to Look Up the records and to select a series associated with the Promotion. This field can be left blank if the Promotion is not aimed at a Series.
- **Valid From.** Enter the date and time from which the Promotion is Valid From.
- **Expired Description.** Enter the details of the message that will be displayed when a customer attempts to use the Promotion outside the valid time frame.
- **Valid To.** Enter the date and time to which the Promotion is Valid To.

Qualifying Details:

- **Product Group.** If applicable, use the magnifying glass to Look Up the records dialog and select the Product Group associated with the Promotion.
- **Activities From.** If applicable, enter the qualifying period during which activities must occur in order to qualify for the promotion. The code can only be redeemed against activities running on or after this date.

- **Communication Name.** If creating an email Promotion, enter the qualifying eCommunication.
- **Communication Days.** If creating an email Promotion, enter the qualifying eCommunication days.
- **Product Variant Type.** If the promotion is for a specific Variant Type, use the magnifying glass to Look Up the records dialog and select the Product Variant associated with the Promotion.
- **Activities To.** If applicable, enter the qualifying period during which activities must occur in order to qualify for the promotion. The code can only be redeemed against activities
- **Valid Bookings X Days since Communication.** If creating an email Promotion enter the number of days after the communication in which bookings must be made in order to qualify.

Reward Details:

- **Reward Product Group.** If a promotion is to be offered for an entire product group, use the magnifying glass to Look Up and select a product group. All bookable products that sit within the chosen product group will be subject to the promotion.
- **Reward Activities To.** If using a **Reward Product Group**, enter the date that the promotion for this group is available to.
- **Reward Activities From.** If using a **Reward Product Group**, enter the date that the promotion for this group is available from.

e) When the details are complete select **Save and Close** on the ribbon. The Promotion will be enabled when entering the Promotional Code in the appropriate Channel.

EXAMPLE OF A PROMOTION RECORD CREATED

The example below shows the mandatory fields that have been completed within a Promotion form, for a percent off a booking type Promotion. This Promotion is not relevant to a certain product which is why the Fixture, Series and Bookable Product fields are not completed, instead this Promotion applies to all products that are part of the basket. Please note that if this promotion was relevant to a specific Fixture, Series or Bookable Product, the relevant field within the Promotion form must be completed.

Record Type	Name	Description	Promotion Type	Valid From	Expired Description	Type	Code	Percent	Valid To
Promotion	10% off Promotion Code	10% Discount throughout May	Percentage off Booking Total	01/05/2015	This Promotion has expired	% of Booking	PROMOTION	15.00	31/05/2015

2. COUPONS

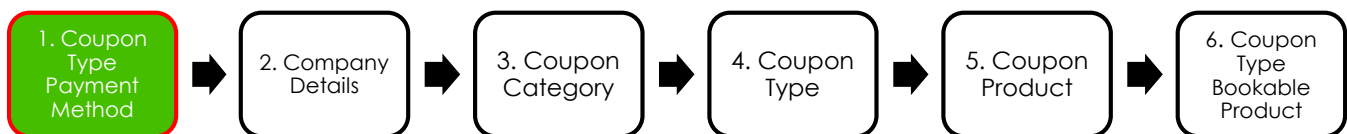
Coupons have no monetary value and can only be redeemed against defined activities. For example, getting a free product or a reduced price off a product, or they can be created so that they can be purchased as a gift. Coupons can also be set up to be sold externally by 3rd parties, such as Groupon or internally by the organisation. Setting up coupons involves a number of entities that must be completed and each of these entities are listed below.



A [Coupon Check List](#) can be found at the end of this document to ensure each step has been completed.

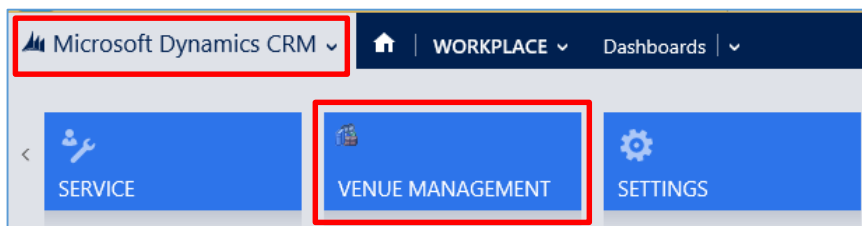
STEP 1. SETTING UP A COUPON TYPE PAYMENT METHOD

A Coupon type payment method must be created. This is to allow products to be paid for by the redemption of a Coupon.

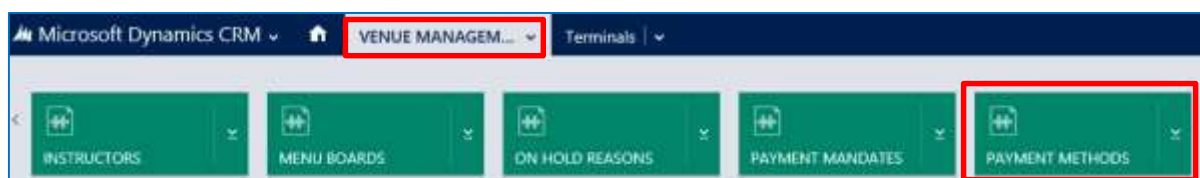


To create a Coupon payment method, complete the following:

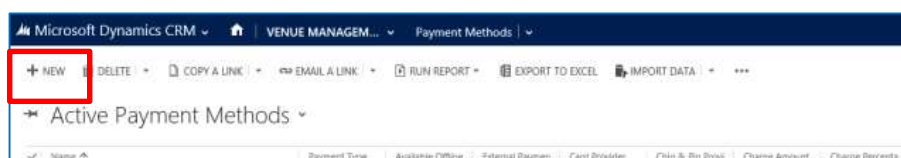
- Within CRM, select the **Microsoft Dynamics CRM** tab in the navigation bar before scrolling across and choosing **Venue Management** from the drop down.



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



- The Active Payment Methods view will be displayed, select **New** on the ribbon.



- A New Payment Method form will be displayed, complete the following details within the form:

General

- **Name.** Enter the name of the Payment Method, for example Coupon.
- **Payment Type.** Select **Coupon** from the drop down list.
- **Description.** If applicable enter a description of the Coupon type Payment Method



Note: All other fields within the Payment Method form should be left in their default selection and not completed or changed.

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

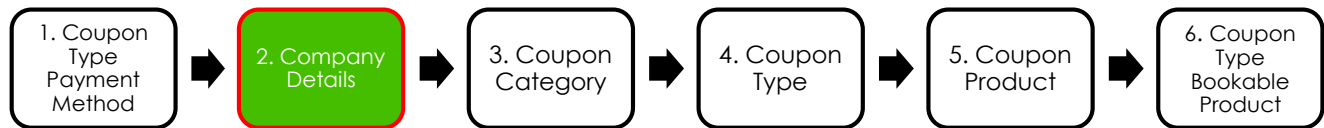
EXAMPLE OF A COUPON PAYMENT METHOD RECORD CREATED

The example below shows the mandatory fields that have been completed within a Payment Method form when creating a Coupon type Payment Method

Record Type	Name	Payment Type
Payment Method	Coupon	Coupon

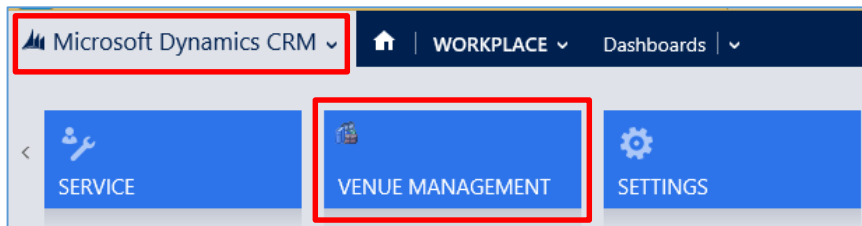
STEP 2. SETTING THE COMPANY DETAILS TO ACCEPT COUPONS

The next step is to ensure that your organisation is set up to accept Coupons. Without this the Coupon functionality will not work on the system.

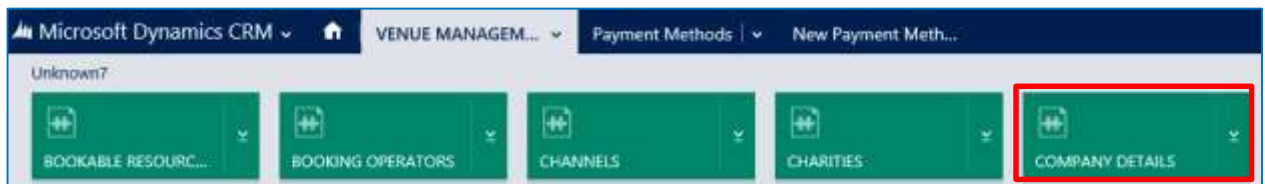


To do this complete the following:

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



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



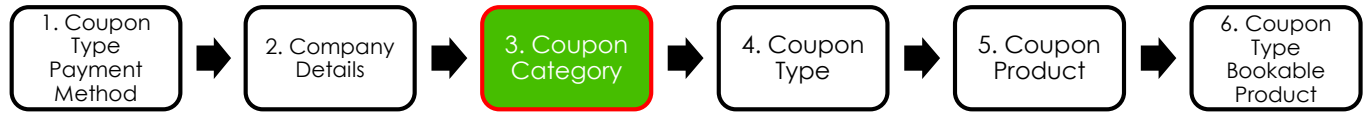
- c) The Active Company Details view will be displayed, select and open the Company Details form.
- d) Within the Company Details form, scroll down to the Options area and set the following flag:
- **Use Coupons.** Select the flag to **Yes**.

Use Coupons ☒ Yes

- e) Once the details are complete, select the **Save** icon in the bottom right hand corner of the screen.

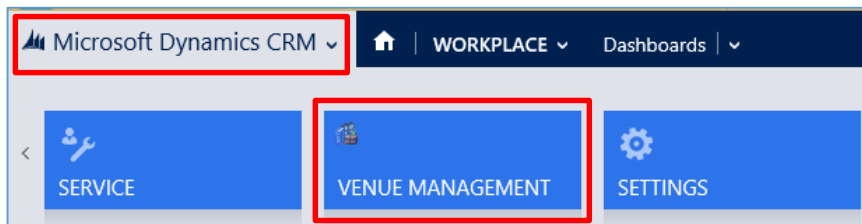
STEP 3. CREATING A COUPON CATEGORY

A Coupon Category must be created which will essentially hold all Coupons related to a particular area. For example a Coupon Category of Membership Coupons could be created, then each [Coupon Type](#) discussed in Step 4, for a Membership can be held in this Coupon Category.



To create a new Coupon Category, complete the following:

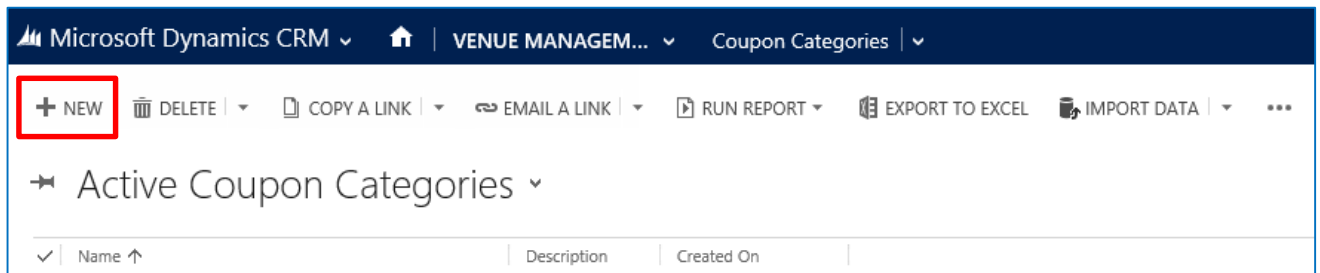
- a) Within CRM, select the **Microsoft Dynamics CRM** tab in the navigation bar before scrolling across and choosing **Venue Management** from the drop down.



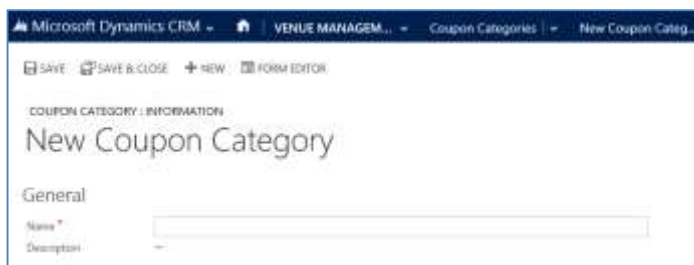
- b) Next select the **Venue Management** tab in the navigation bar and from the drop down, scroll across and choose **Coupon Categories**.



- 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.

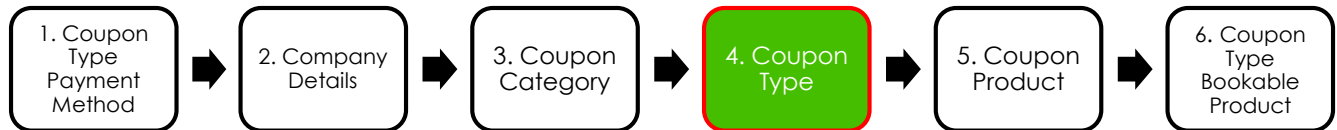
EXAMPLE OF A COUPON CATEGORY RECORD CREATED

The example below shows the mandatory fields that have been completed within a Coupon Category form for the purpose to demonstrate in this document.

Record Type	Name	Description
Coupon Category	Dragon Bay Coupons	A Coupon Category to hold all Coupons related to Dragon Bay

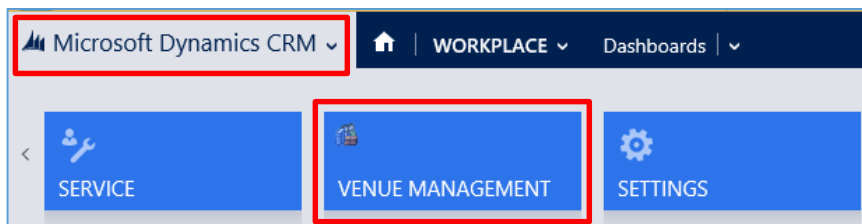
STEP 4. CREATING A COUPON TYPE

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:

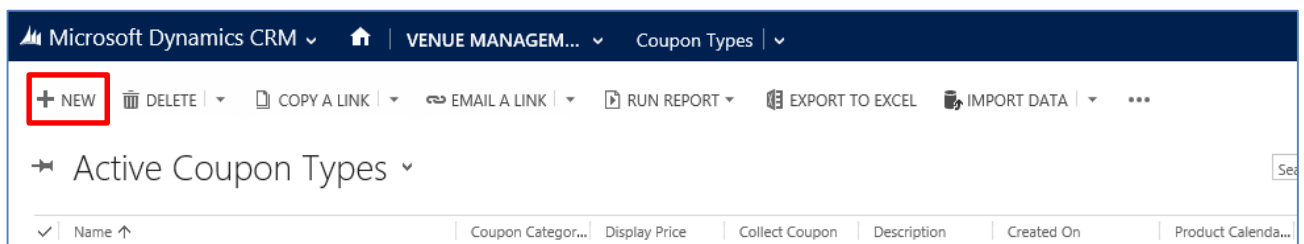
- a) Within CRM, select the **Microsoft Dynamics CRM** tab in the navigation bar before scrolling across and choosing **Venue Management** from the drop down.



- 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. This is 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 in. 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 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 of the coupon. 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 which has been created for the purpose 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.

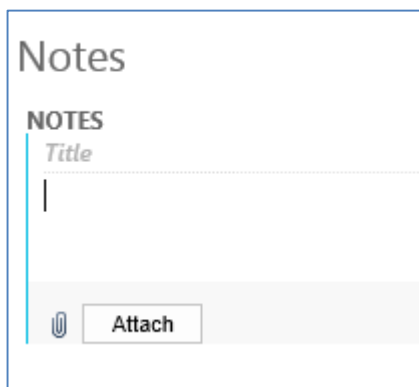
Record Type	Name	Description	Number of Codes	Code 1 Pre-Existing	Coupon Category	Collect Coupon	Code 2 Pre-Existing
Coupon Type	Castle Tours Coupon	A coupon that can be redeemed for a tour of the Castle	1	Yes	Dragon Bay Coupons	No	No

ADDING AN IMAGE TO THE COUPON CATEGORY AND COUPON TYPE:

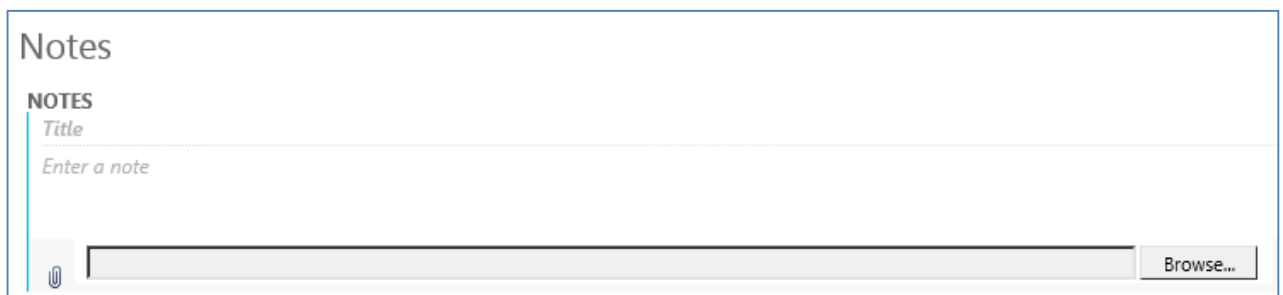
It is possible to add an image to your Coupon Category and Coupon Type. This will be shown when the Category and Type of the Coupon is selected on the Web. Please note that an image does not have to be added to a Coupon Category.

To add an image to the Coupon Category and/or Coupon Type, complete the following:

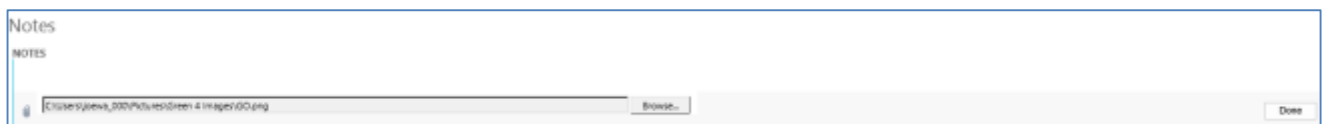
- With the Coupon Category or Type form open, scroll down to the **Notes** section of the form.



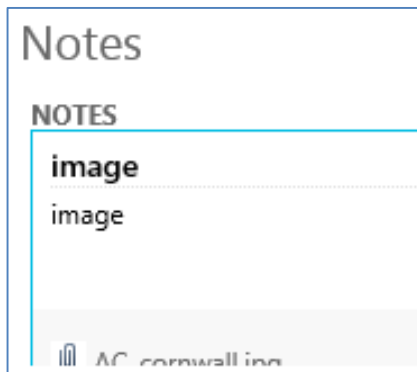
- Select the **Attach** button and then **Browse** to search for the image file before selecting it.



- Upon finding and opening the image, select **Done**.



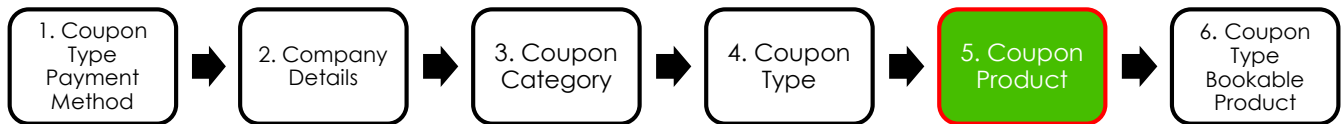
- d) When the image has been attached, select the notes area and add a title called image before again writing image in the notes area, as is shown below.



- e) Select the Save icon in the bottom right hand corner of the Coupon Category or Type form

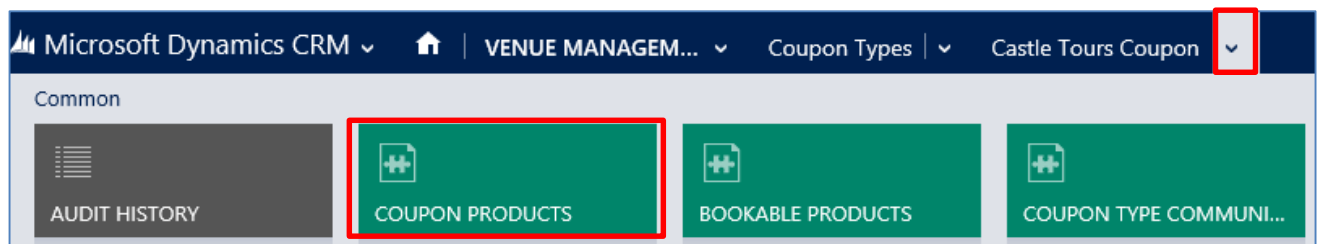
STEP 5. CREATING THE COUPON PRODUCT

The Coupon Product is where the Product Variant that can be purchased is setup. Multiple Coupon Products can be added to be used against one [Coupon Type](#), necessary if the Coupon applies to more than one Product Variant.

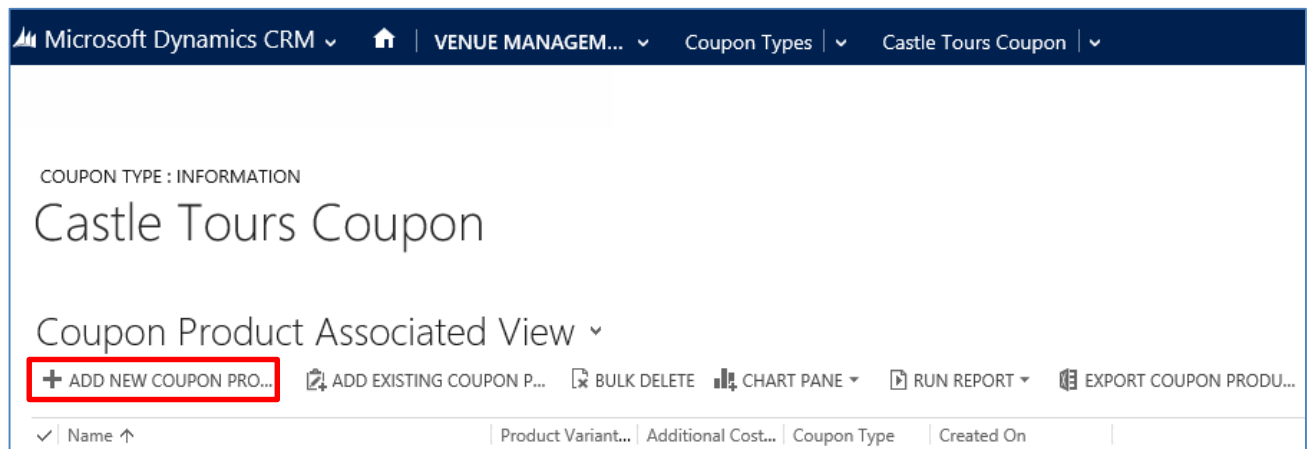


To set up the Coupon Product the steps below must be followed:

- 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:

General

Name * Coupon Type Castle Tours Coupon

Product Variant * -- Additional Cost --

- **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. Castle Tour (Adult), Castle Tour (Child) and Castle Tour (Senior).
- **Coupon Type.** The [Coupon Type](#) field will be automatically completed.
- **Additional Cost.** If applicable, enter the additional cost for the Product variant. If no additional cost applies, leave this field blank.

d) Once the details are complete, select **Save and Close** on the ribbon.

e) Repeat the above process of adding Coupon Products to cover all of the Product Variants that can be purchased using the coupon.

EXAMPLE OF COUPON PRODUCT RECORDS 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.

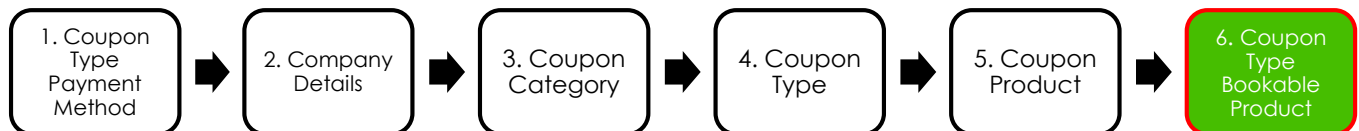
Record Type	Name	Product Variant	Coupon Type	Additional Cost
Coupon Product	Guided Castle Tour (Adult)	Guided Castle Tour (Adult)	Castle Tours Coupon	N/A
Coupon Product	Guided Castle Tour (Junior)	Guided Castle Tour (Junior)	Castle Tours Coupon	N/A

STEP 6. CREATING THE COUPON TYPE BOOKABLE PRODUCT

It is essential to create a Coupon type Bookable Product which 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. 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, 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 Lists. For more information on these see the Go CRM 2015 Product Management User Guide.

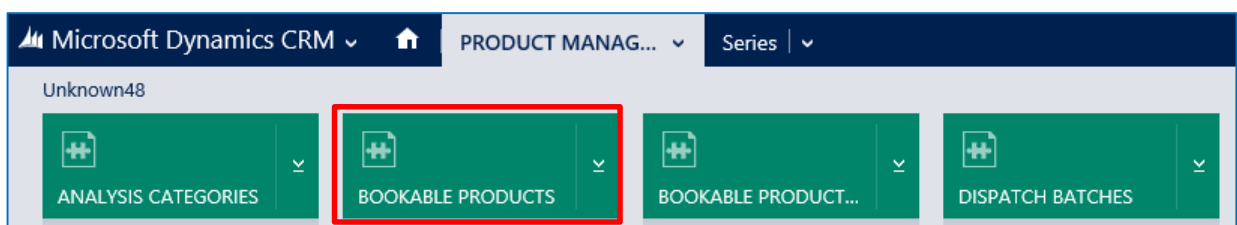


To set up a Coupon type Bookable Product, carry out the following:

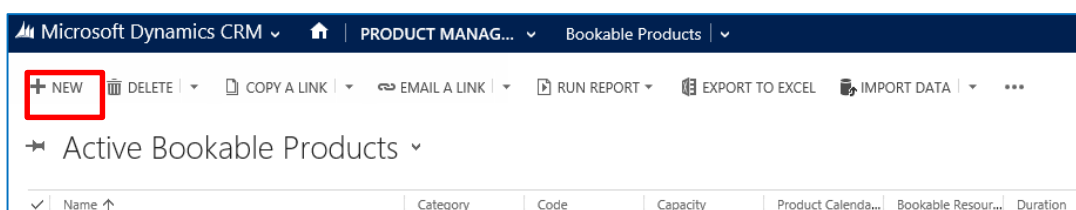
- a) Select or hover over the **Microsoft Dynamics CRM** tab before scrolling across the drop down list of the navigation bar and selecting **Product Management**.



- 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: The fields not listed below do not need to be changed and can be left in their default stage.

General	
Name *	--
Translated Name	--
Description	--
Cross Sell Product ID	--
Type	Stock
Availability	--
Is Course	No
Ask Booking Question	No
Is Single Booking	No
Print Vouchers	No
Is Anonymous	No
Match Sit Anywhere	No
VAT code	--
Payable By	--
External Product ID	--
Meal deal	No
Purchaser Price For	Yes
Sequence	--
Beneficiary Required	Not Required
Capacity	--
Report Category	--
Code	--
Available Offline	No
Mandatory Variants	No
Voucher Valid Days	--
Ticket booking fee	No
Future Coupon Product	--
Direct Debit Mandate	No

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 be set to allow anonymous purchases also.
- **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](#) that you have previously set up, see Step 4 for more details.

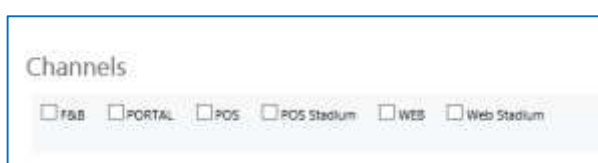
Time Settings:

- **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.

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 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, for example POS and Web.



The screenshot shows a section titled 'Channels' with a list of six channels, each with an unchecked checkbox to its left: F&B, PORTAL, POS, POS Stadium, WEB, and Web Stadium.

- 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.

The screenshot shows the 'Variants & Pricing' section. On the left, there is a drop-down menu with a red box around it. To the right, there is a table with columns for 'Code', 'Not for Sale', and 'Mandatory Variant'. The table is currently empty.

- 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.

The screenshot shows the 'Variants & Pricing' section. On the left, there is a list of variants with a red box around it. The variants are: 'Castle Tours Coupon (Adult)', 'Castle Tours Coupon (Child)', 'Castle Tours Coupon (Senior)', and 'Castle Tours Coupon (Student)'. Each variant has a red minus sign to its left and a green plus sign to its right. To the right of the list is a table with columns for 'Code', 'Not for Sale', and 'Mandatory Variant'. The table is currently empty.



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).

The screenshot shows the 'Variants & Pricing' section. On the right, there is a drop-down menu with a red box around it. The list of variants is visible on the left, including 'Castle Tours Coupon (Adult)', 'Castle Tours Coupon (Child)', 'Castle Tours Coupon (Senior)', and 'Castle Tours Coupon (Student)'. Each variant has a red minus sign to its left and a green plus sign to its right.

- 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.

Variants & Pricing

Dragon Bay- Castle Tours

	Code	Not for Sale	Mandatory Variant	Peak Price	Off Peak Price
Castle Tours Coupon (Adult)	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text" value="9.00"/>	<input type="text" value="9.00"/>
Castle Tours Coupon (Child)	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text" value="4.50"/>	<input type="text" value="4.50"/>
Castle Tours Coupon (Senior)	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text" value="4.50"/>	<input type="text" value="4.50"/>
Castle Tours Coupon (Student)	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text" value="4.50"/>	<input type="text" value="4.50"/>

- iii. Repeat this process for each Variant Price List used to determine the pricing of the selected product.
- 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 which 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	Castle Tours Coupon	Coupon	Castle Tours Coupon	Gift Experience	Standard Colander	13/05/2015	01/06/2015	POS WEB	Adult Junior Senior	Coupon Price List	9.00 4.50 5.00

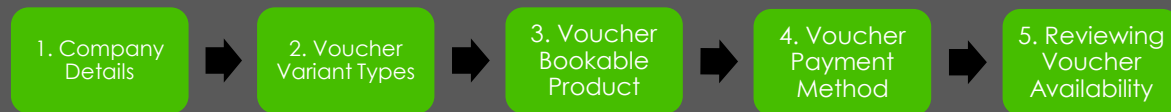
COUPONS CHECK LIST

Task	Completed?	Comments
1. Created the Coupon type Payment Method		Ensure the Payment Type chosen is Coupon .
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		<p>Ensure the Coupon Category previously created is entered.</p> <p>Ensure the Number of Codes field is entered with either 1 or 2.</p> <p>Ensure the various relevant Coupon dates have been entered which control the Coupons availability.</p>
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		<p>Ensure the Bookable Product type selected is Coupon.</p> <p>Ensure a Category and Product Calendar have been entered.</p> <p>Ensure that the Coupon Type previously created is entered.</p> <p>Ensure the relevant channel check boxes are ticked.</p> <p>Ensure a variant has been added.</p> <p>Prices should be added to an active Variant Price List that has been linked to a Channel Price List.</p>

3. VOUCHERS

Vouchers have a monetary value and can be redeemed against any product set up within the Go system. For example, Vouchers with different values can be created, such as a £10 Voucher, £20 Voucher or £50 Voucher. These can then be purchased by a customer as a gift and each Voucher will have a redeemable code which can then be entered when purchasing a product.

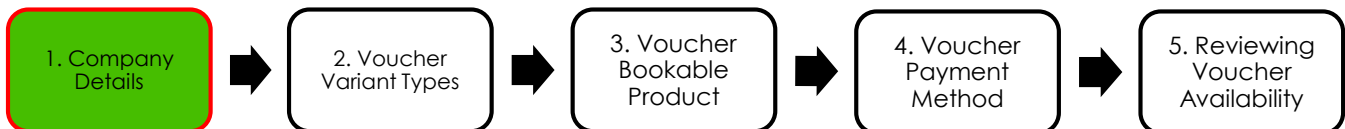
Setting up Vouchers involves a number of entities which must be completed. Each of these entities are listed below.



A [Voucher Check List](#) can be found at the end of this section to ensure each step has been completed.

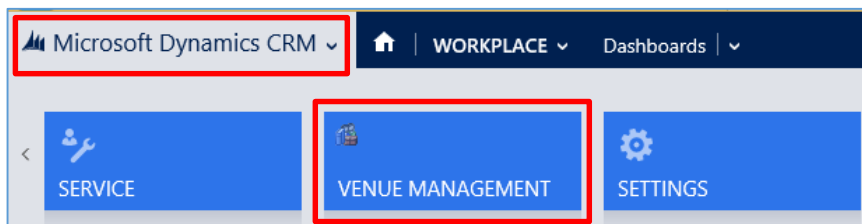
STEP 1. SET THE COMPANY DETAILS TO ACCEPT VOUCHERS

Firstly be sure to have set your organisations Company Details to accept the use of Vouchers. Without this Vouchers cannot be used on the system.

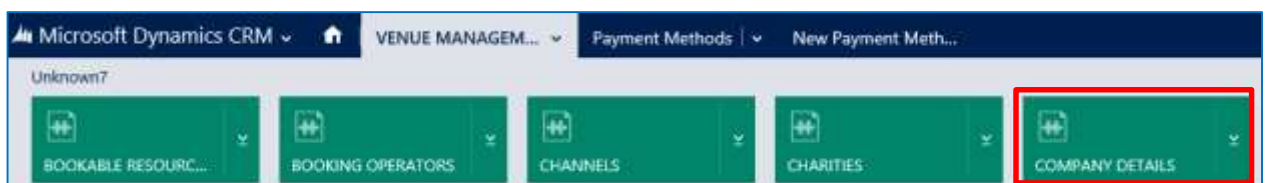


To do this complete the following instructions:

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



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



- The Active Company Details view will be displayed, select and open the Company Details form.

- d) Within the Company Details form, scroll down to the Options area and set the following flag:

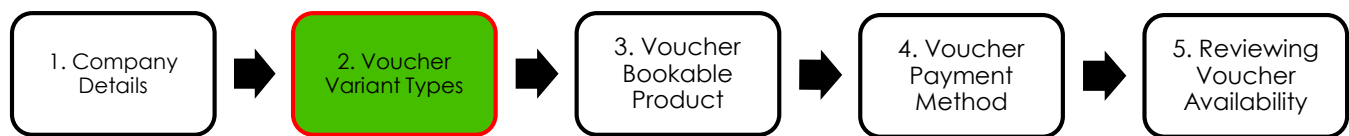
Use Vouchers	Yes
--------------	-----

- **Use Vouchers.** Set to Yes to enable the use of Vouchers.

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

STEP 2. CREATING THE VOUCHER VARIANT TYPES

The next step is to create the Voucher Variant Types (if they do not already exist in your system). The Variant Type entity is used to create categories of products, for example a £10 Voucher, £20 Voucher, £50 Voucher. These are then entered in the [Voucher type Bookable Product](#) form as is discussed in Step 3.

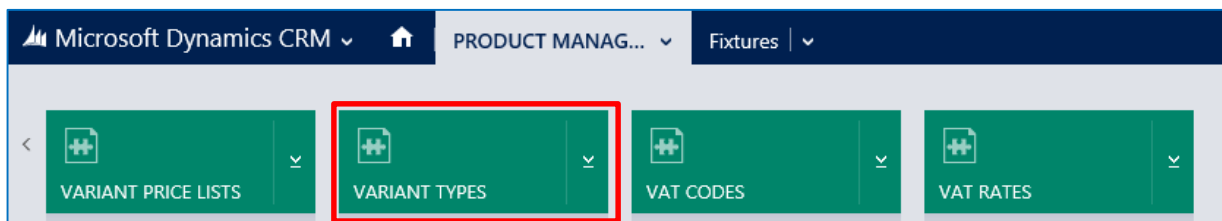


To create a Variant Type record from the Product Variants form:

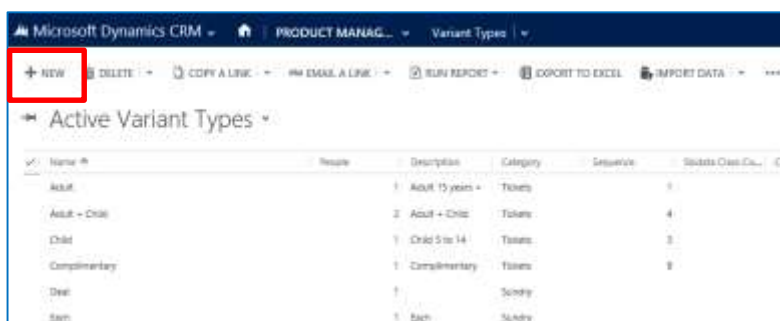
- a) Select or hover over the **Microsoft Dynamics CRM** tab before scrolling across the drop down list of the navigation bar and selecting **Product Management**.



- 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, for example £10 Voucher, £20 Voucher or £50 Voucher.
- **People.** Enter the amount of people the Voucher applies to.
- **Translated Name.** Used for translated implementations of Green 4 Ticketing.
- **Description.** Enter a description of the Variant Type.
- **Category.** Used to group the Variant Types into categories. Use the magnifying glass to look up a new category or if applicable, enter a new Category.
- **Voucher Value.** Enter the value of the voucher. This represents the amount the Voucher is worth when it is redeemed by the customer. For example if the Voucher Variant type is for a £10 Voucher, enter the number 10.
- **Sequence.** Used to determine the order in which variants are listed on the POS or ticketing web site.



Note: All other fields that are not displayed above do not need to be created.

e) Select **Save and Close** on the ribbon to save the changes made.

f) Repeat the above process for each Voucher value that is required.

EXAMPLE OF VOUCHER VARIANT TYPE RECORDS CREATED

The examples below show a number of Voucher Variants that have been created for use to demonstrate as part of this document.

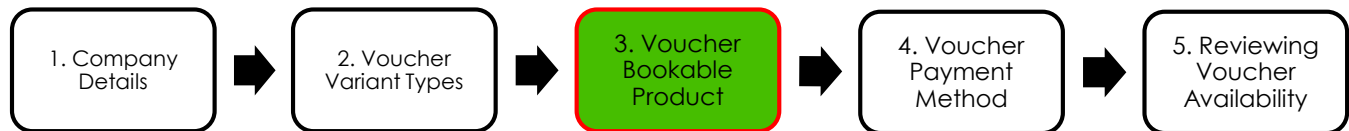
Record Type	Name	Voucher Value	People	Category
Variant Type	£10 Voucher	10.00	1	Vouchers
Variant Type	£20 Voucher	20.00	1	Vouchers
Variant Type	£50 Voucher	50.00	1	Vouchers

STEP 3. CREATE THE VOUCHER TYPE BOOKABLE PRODUCT

It is essential to create a Voucher type Bookable Product, as this will control the cost of the Voucher and the Sales Channels they will be available on. The [Voucher Variant types](#) created in Step 2 are added to the Voucher type Bookable Product.

It is assumed that the following items have been set up in CRM:

- **Channels.** The Channels the products will be sold. For more information see the Go CRM 2015 Infrastructure Setup User Guide.
- [Voucher Variant Types](#). See Step 2 Creating the Voucher Variant Types for more information.
- **Variant Price List.** The Variant Price List is selected in the Variant and Pricing section of the Bookable Product form, where the pricing of the product is entered. The Variant Price Lists are also subsequently linked to the Channel using the Channel Price List entity. For more information see the Go CRM 2015 Product Management User Guide.
- **Sales Plan and Channel Price Lists.** For more information on these see the Go CRM 2015 Product Management User Guide.

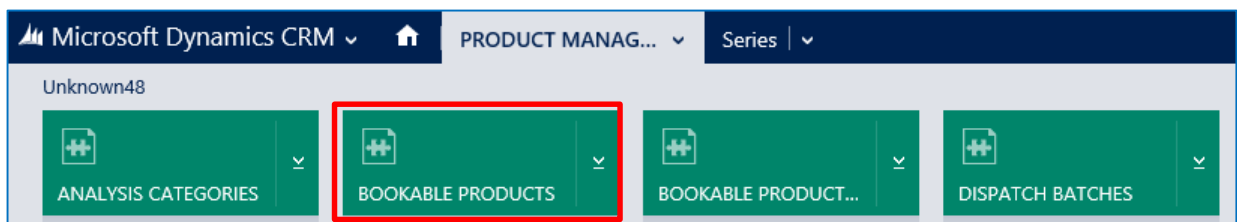


To set up the Voucher type Bookable Product, complete the following

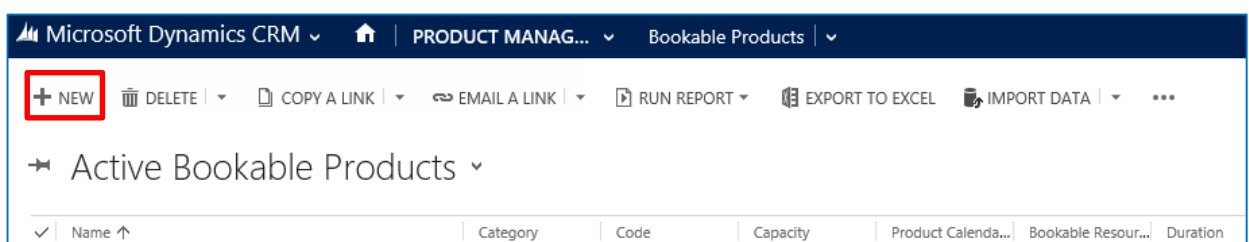
- a) Select or hover over the **Microsoft Dynamics CRM** tab before scrolling across the drop down list of the navigation bar and selecting **Product Management**.



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



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



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



Note: The fields that are not listed below do not need to be changed and can be left in their default stage.

General	
Name *	--
Translated Name	--
Description	--
Cross Sell Product ID	--
Type	Voucher
Availability	--
Is Course	No
Ask Booking Question	No
Is Single Booking	No
Print Vouchers	No
Is Anonymous	No
Match Sit Anywhere	No
VAT code	--
Payable By	--
External Product ID	--
Meal deal	No
Purchaser Price For	Yes
Sequence	--
Beneficiary Required	Not Required
Capacity	--
Report Category	--
Code	--
Available Offline	No
Mandatory Variants	No
Voucher Valid Days	--
Ticket booking fee	No
Future Coupon Product	--
Direct Debit Mandate	No

General:

- **Name.** Enter **Voucher** as the Name of the product.
- **Translated Name.** Used for translated implementations.
- **Description.** Enter a description of the product, more information on this can be found in the Go CRM 2015 Product Management User Guide.
- **Type.** Use the drop-down list to select the type of product. In this instance select **Voucher** 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 be set to allow anonymous purchases also.
- **Print Vouchers.** Select **Yes** if the Voucher is to be printed. If this option is enabled the Print Vouch/Coup button will be enabled in the POS.
- **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.
- **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.
- **Voucher Valid Days.** Enter the number of days the voucher will be valid for.

Referring Entities:

- **Category.** Use the Look Up dialog to select the product category. The category is used to group products. The category is used by the price list editor.
- **Product Calendar.** Select the default product calendar.

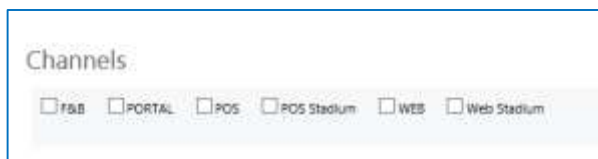
Time Settings:

- **Available Date From.** Enter the date the voucher goes on sale.
- **Available Date To.** Enter the date the voucher is removed from sale.
- **Available Time From.** Enter the time the voucher goes on sale.
- **Available Time To.** Enter the time the voucher 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. 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, for example POS and Web.



- 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 [Voucher Variant types that were created in Step 2.](#)

- iii. Select the green cross alongside the Variant name to add a new Variant.
iv. Repeat until all of the [Voucher Variants](#) Types are listed. If you need to remove a variant, click the red minus sign alongside the variant.

	Code	Not for Sale	Mandatory Variant
Voucher - £5 (Voucher - £5)	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>
Voucher (Voucher £10)	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>
Voucher (Voucher £25)	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>
Voucher (Voucher £50)	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>



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.

	Code	Not for Sale	Mandatory Variant	Peak Price	Off Peak Price
Voucher - £5 (Voucher - £5)	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text" value="5.00"/>	<input type="text" value="5.00"/>
Voucher (Voucher £10)	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text" value="10.00"/>	<input type="text" value="10.00"/>
Voucher (Voucher £25)	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text" value="25.00"/>	<input type="text" value="25.00"/>
Voucher (Voucher £50)	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text" value="50.00"/>	<input type="text" value="50.00"/>

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

EXAMPLE OF A VOUCHER TYPE BOOKABLE PRODUCT RECORD CREATED

The example below shows a Voucher type Bookable Product that has been setup and the mandatory fields that have been completed within the form.

Record Type	Name	Type	Voucher Valid Days	Category	Product Calendar	Available Date From	Available Date To	Channels	Variants	Variant Price List	Pricing
Voucher type Bookable Product	Voucher	Voucher	365	Gift Experience	Standard Colander	13/05/2015	01/06/2015	POS WEB	£10 Voucher	Vouchers Price List	10.00
									£20 Voucher		20.00
									£50 Voucher		50.00

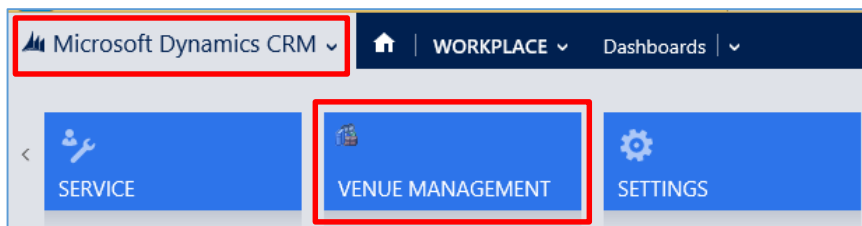
STEP 4. CREATE THE VOUCHER PAYMENT METHOD

To accept Vouchers as payment for products purchased through the Go CRM system, it is necessary to add the Voucher (Managed) Payment Method to the channel(s) through which Vouchers can be used.

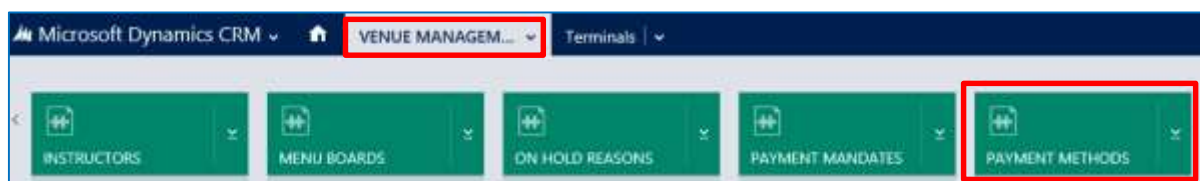


To set up the Payment Method and add it to a Channel carry out the following:

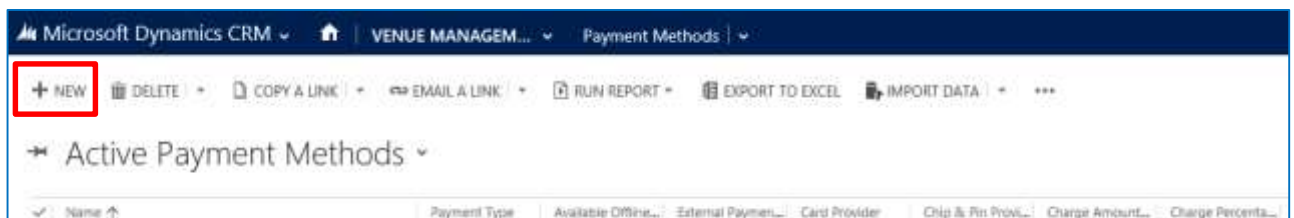
- a) Within CRM, select the **Microsoft Dynamics CRM** tab in the navigation bar before scrolling across and choosing **Venue Management** from the drop down.



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



- c) The Active Payment Methods view will be displayed, select **New** on the ribbon.



- d) A New Payment Method form will be displayed, complete the following details within the form:

Payment Method Information

New Payment Method

General

Name *	---	Description	---
Payment Type	---	Available Offline	No
External Payment ID	---	Auto Pay	No
Set amount to invoice	No	Previous Version	---
Sequence Number	---	Redirect	---
Fee	---	Collect Account Data	No
Drop Redirect	---	Auto Supply Data	---
Auto Advance Date	---	Update Booking Status	Yes
Code	---		

Charges

Charge Amount	---	Charge Percentage	---
---------------	-----	-------------------	-----

Tab Payment

Tab Visibility Global	No
-----------------------	----

- **Name.** Enter a name for the Payment Method, for example; Vouchers.
- **Payment Type.** Use the drop-down list to select **Voucher (Managed)**.
- **Description.** Enter a short description of the payment method.



Note: All other fields should not be completed or changed and left in the default selection.

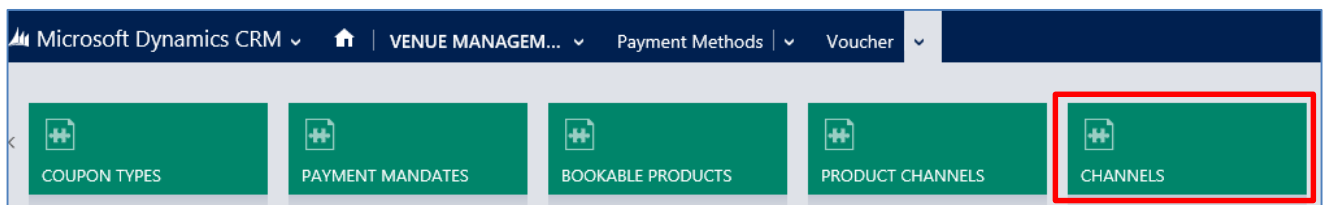
- e) When the details are complete select **Save** on the ribbon, keep the Voucher type Payment Method form open.

ADDING THE PAYMENT METHOD TO THE CHANNELS.

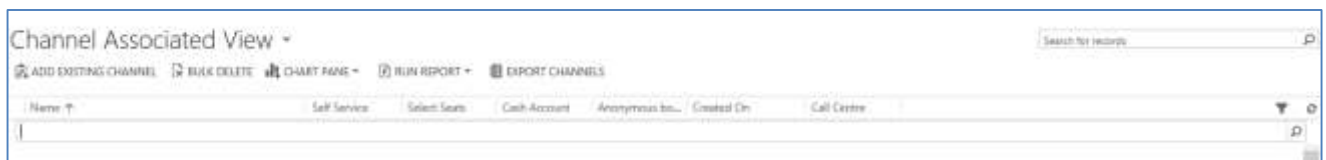
Next it is necessary to define the Channels that will use the Voucher (Managed) payment method.

To achieve this complete the following:

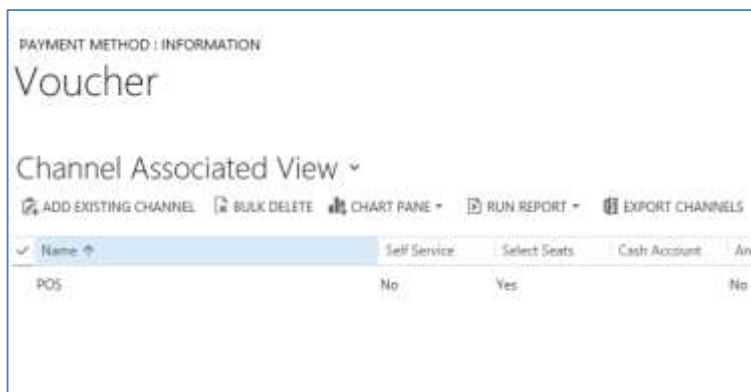
- a) With the Voucher (Managed) Payment Method form open, select the small arrow next to the name of the Voucher Payment method. From the drop down, scroll across and select **Channels**.



- b) The Channel Associated View will be displayed, select **Add Existing Channel** on the ribbon.
- c) A search bar will drop down. Either type in the name of the Channel or use the magnifying glass icon to look up more records.



- d) Upon finding the relevant Channel, select it. The Channel will then appear in the Channel Associated View.



- e) Repeat the above process for all the Channels that are going to use the Voucher type Payment Method.

EXAMPLE OF A COUPON PAYMENT METHOD RECORD CREATED

The example below shows the mandatory fields that have been completed within a Payment Method form when creating a Voucher type Payment Method as well as highlighting the Channels it has been linked to.

Record Type	Name	Payment Type	Linked Channel
Payment Method	Voucher	Voucher (Managed)	POS

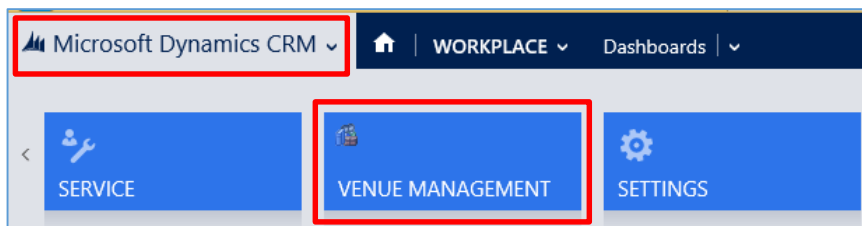
STEP 5. REVIEWING THE VOUCHER AVAILABILITY IN CRM

Once a Voucher has been purchased, its availability and the unique number that has been generated can be viewed.

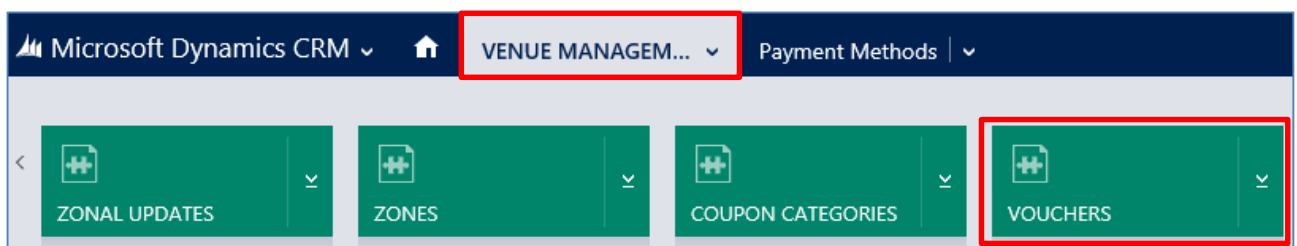


To view the availability and unique number of a Voucher complete the following within CRM 2015:

- 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 choose **Vouchers**.



- c) The Active Vouchers view will be displayed, a list of all the Vouchers that have been purchased will be shown.

Customer Name	Reference Number	Voucher Status	Booking	Value	Purchase Date	Expiry Date	Issued	Printed	Name	Created On
Tom Green	S00N-F3UDQ-3...	Available		\$50.00	06/05/2015	25/05/2016			VOUCHER	06/05/2015 16:47
Tom Green	YU0R-F3UDQ-52...	Available		\$25.00	06/05/2015	25/05/2016			VOUCHER	06/05/2015 16:47
Tom Green	N00S-F3UDQ-4...	Available		\$25.00	06/05/2015	25/05/2016			VOUCHER	06/05/2015 16:47
Tom Green	HU0H-F3UDQ-1...	Available		\$5.00	06/05/2015	25/05/2016			VOUCHER	06/05/2015 16:47
Tom Green	Q10M-F3UDQ...	Available		\$10.00	06/05/2015	25/05/2016			VOUCHER	06/05/2015 16:47
Tom Green	U00L-F3UDQ-50...	Available		\$30.00	06/05/2015	25/05/2016			VOUCHER	06/05/2015 16:47
Tom Green	P00P-F3UDQ-1...	Available		\$5.00	06/05/2015	25/05/2016			VOUCHER	06/05/2015 16:47
Tom Green	G00B-F3UDQ-VL...	Available		\$10.00	06/05/2015	25/05/2016			VOUCHER	06/05/2015 16:47

- d) The column, **Voucher Status** displays if the Voucher that has been purchased is either still **Available** or has been **Redeemed**.
- e) To review a particular Voucher, select the appropriate Voucher. The voucher form will be displayed.

Microsoft Dynamics CRM | VENUE MANAGEM... | Vouchers | VOUCHER

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

VOUCHER : INFORMATION

VOUCHER

General

Reference Number	SJ20N-F3UD2-301U5	Customer Name	Tom Green
Voucher Status*	Available	Expiry Date	05/05/2016
Booking	--	Emailed	--
Purchase Date	06/05/2015	Name*	VOUCHER
Printed	--		
Value	\$50.00		

- f) The field named **Reference Number** displays the Voucher number that was entered into either the POS or Web to redeem the Vouchers value against a product.
- g) The field named **Voucher Status** displays if the Voucher that has been purchased is either still Available or has been Redeemed. If the Voucher has been redeemed the field will automatically change from displaying **Available** to **Redeemed**.

VOUCHERS CHECK LIST

Task	Completed?	Comments
1. Set the Company Details to accept Vouchers		In the Company Details form ensure the Use Vouchers option is set to Yes
2. Created the Voucher Variant Types		Ensure a Voucher Value is entered that represents the value of the Voucher for each Voucher Variant Type that is created
3. Created the Voucher type Bookable Product		<p>Ensure the Bookable Product type selected is Voucher</p> <p>Ensure the Voucher Valid Days field has been entered with the number of days that the Voucher is available for</p> <p>Ensure a Category and Product Calendar have been entered</p> <p>Ensure the relevant Channel check boxes are ticked</p> <p>Ensure the Voucher Variant types has been added</p> <p>Prices should be added to an active Variant Price List that has been linked to a Channel Price List.</p>
4. Created the Voucher Payment Method		<p>Ensure the payment type selected is Voucher (managed)</p> <p>Ensure the Channels have been defined where the Voucher Payment Method is to be used</p>
5. Reviewed the Voucher Availability		After selling a Voucher the Voucher can be reviewed

End of Document