POS
VERSION 3.7
USER GUIDE

green4 SOLUTIONS

THE QUEEN'S AWARDS FOR ENTERPRISE: 2014

CONTENTS

ABOUT THIS DOCUMENT

This document has been prepared as a User Guide for using Go's POS

NON-DISCLOSURE

All information contained in this document is to be treated as confidential information provided for the purpose of using Green 4 Solutions modules.

COPYRIGHT

DOCUMENT CONTROL

Version	Date	Change	Initials
V1.0	01/06/2015	This is a refurbished document- continuing from the Green 4 Ticketing POS User Guide 3.7 Version 5.9	JW
V1.1	12/06/2015	Adding a Friend button on Edit Beneficiaries dialog	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

1. LOGGING IN

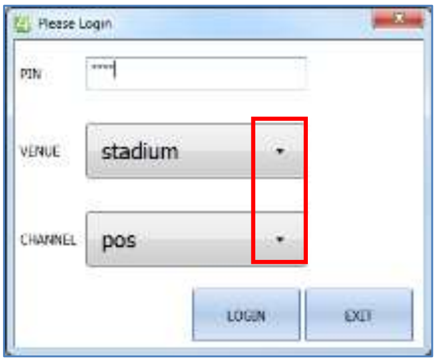
To start using the POS it is first necessary to log in using your unique pin. Using your pin to log in ensures that your sales are attributed to you.

Note: If you have not been issued with a pin for the POS, contact your line manager.

To log into the POS:

1. Double-click the **Green 4** icon on the desktop:

2. The Green 4 Ticketing Login Screen will be displayed:



3. Enter the following details:

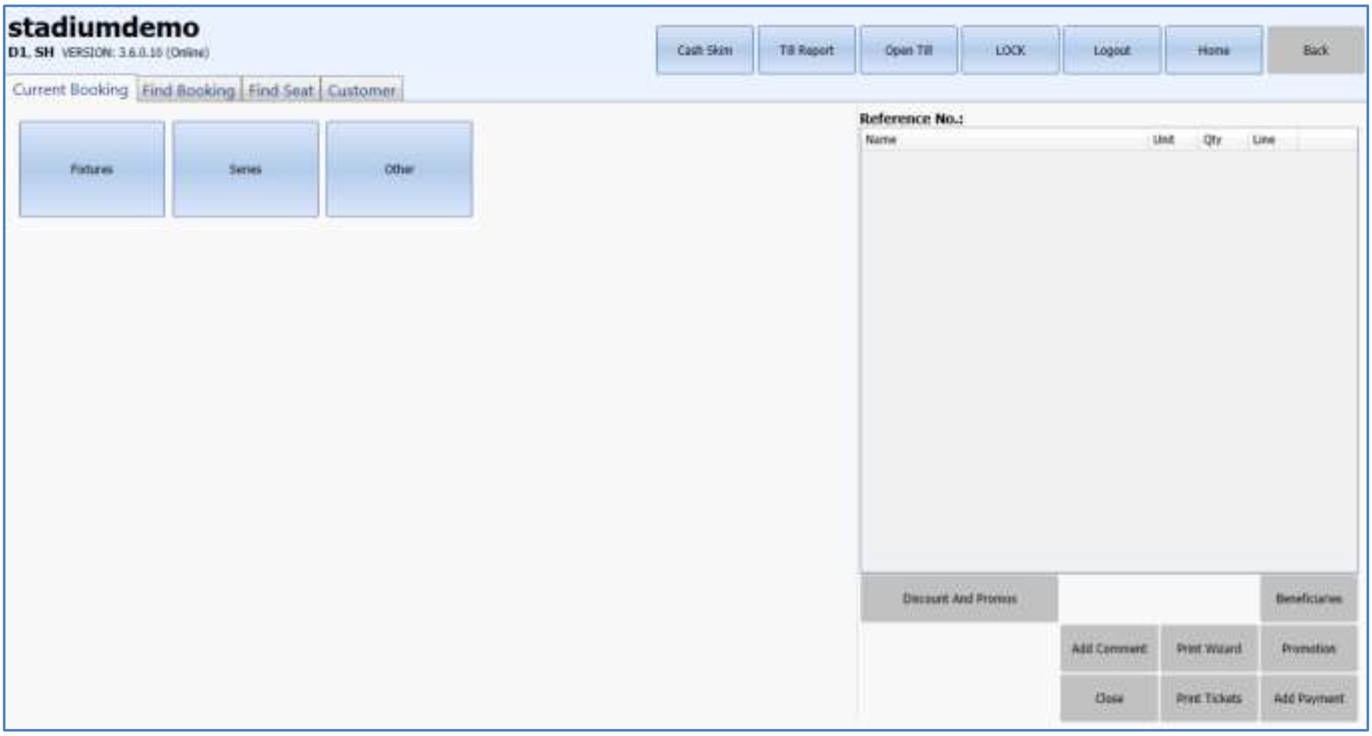
   - **PIN.** Enter your unique Pin. If the onscreen keyboard has been activated for the terminal, the keyboard will be displayed when you click into the PIN field allowing you to enter your login details without the use of standard keyboard. Alternatively, the manual login can be bypassed if you have a valid Dallas Key.
   - **VENUE.** Check the correct Venue is displayed. To change the Venue, select the arrowhead (highlighted above) to open the drop-down list. Select the appropriate venue in the list to continue.
   - **CHANNEL.** Check the correct Channel is displayed. To change the Channel, select the arrowhead (highlighted above) to open the drop-down list. Select the appropriate Channel in the list to continue.

4. Select **LOGIN** to continue.

5. If the details entered are correct the POS Booking Screen will be displayed. If, however, you have entered incorrect details the login screen will be re-displayed allowing you to try again.

2. BOOKING SCREEN

From the Booking screen you can create a new ticket booking or sell a product.



The Booking screen is divided into a number of functional areas, each of which is described in detail in the following sections:

1. Tab Headings
2. Menu
3. Shopping Cart

2.1. TAB HEADINGS

At the top of the Booking screen there are a number of headings, which when selected allow you to move to different areas of the POS application.

The headings available are:

- **Current Booking.** Select to make a booking. By default, this tab will be displayed when the POS application is first opened. From the Current Booking screen the following options are available:
    - **Fixture.** Select if the customer wishes to buy a ticket(s) for a single fixture. The fixture option is only displayed if there are fixtures available for sale via the channel.
    - **Series.** Select if the customer wishes to buy a season ticket(s). The series option is only displayed if there are series products available for sale via the channel.

- Other. Select if the customer wishes to purchase an item other than match or season tickets, for example merchandise. The other option is only displayed if there are fixtures and/or series products for sale via the channel.

- **Find Booking.** Select to search for an existing booking.

Note: If you have a barcode scanner attached to the terminal, scanning a customer's details will automatically bring up the details of the booking.

- **Find Seat.** Select to search for the details of a booking using either the seat number or ticket number.
- **Tabs.** Displays any tabs that are currently open.
- **Customer.** Select to search for an existing customer.
- **Coupon.** Select to redeem coupons.
- **Cashless Accounts.** Used to manage cashless accounts.
- **Other.** Select to access additional functionality, for example the ad-hoc print option.
- **Access Gate.** Select to go to the Access Gate section of the POS

2.2. MENU

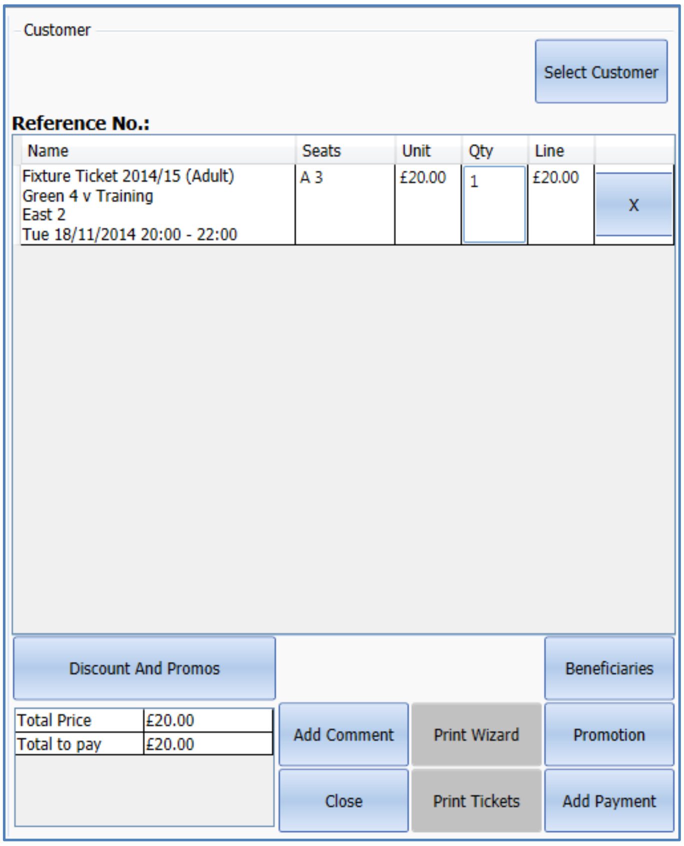
Above the Shopping Cart a number of menu options are available.

The menu options available are:

- **Cash Skim.** Use to enter details about a removal of money from the till.
- **Till Report.** Use to print out the details of the till activity for the current shift.
- **Open Till.** Use to open the till drawer (if integrated).
- **Lock.** Select to lock the terminal. When the terminal is locked you will need to re-enter your pin to restart using THE POS. Any bookings that are in progress will be available when you log back into the terminal. You should use this option if you are leaving the terminal unattended.
- **Logout.** Select to log out of the POS. If you have any bookings open you will be asked to save or discard the details before you log out.
- **Home.** Select to return to the POS home page. The Current Booking tab will be displayed listing all of the booking categories available.
- **Back.** Select to return to the previously viewed screen.

2.3. SHOPPING CART

The shopping cart is used to display the customer's planned purchases.



In addition to adding goods and paying for purchases, a number of additional functions are available from within the shopping cart:

Note: Some of the options detailed in this guide may not be available on the terminal you are using. For more information contact your Line Manager.

- **Select Customer.** Use to assign an existing customer to the shopping cart. See Using an Existing Customer for more details. This option can also be used to add a new customer to the system, see Creating a New Customer for more details.
- **Delete (X).** Use to delete the selected row from the shopping cart. See Deleting Items from the Shopping Cart for more details.
- **Discount and Promos.** Select to display a list of promotions and discounts that have been applied to the shopping cart.
- **Beneficiaries.** Use to add the details of the beneficiaries of the booking. See Adding Beneficiaries for more details.
- **Add Comment.** Use to add a comment or note to the booking. Comments should be typed directly into the text box provided.
- **Promotion.** Use to add promotions to the shopping cart. See Adding Promotions for more information.

- **Close.** Use to close the shopping cart. If the current purchase has not been completed a message will be displayed asking you to confirm your actions. If you wish to abandon the shopping cart and lose the details entered select **Confirm**. To return to the shopping cart select **Cancel**.
- **Print Wizard.** Select to print the receipt (if configured) or tickets listed in the shopping cart. See Printing Tickets for details.
- **Print Tickets.** Select to print the tickets. This button is enabled when tickets are in the cart ready for printing and a dedicated printer is set up.
- **Add Payment.** Use to add payments to the shopping cart. See Taking Payment for more details.

3. MAKING A BOOKING

The following sections will guide you through the process of taking a booking using the POS system. The process is divided into five steps:

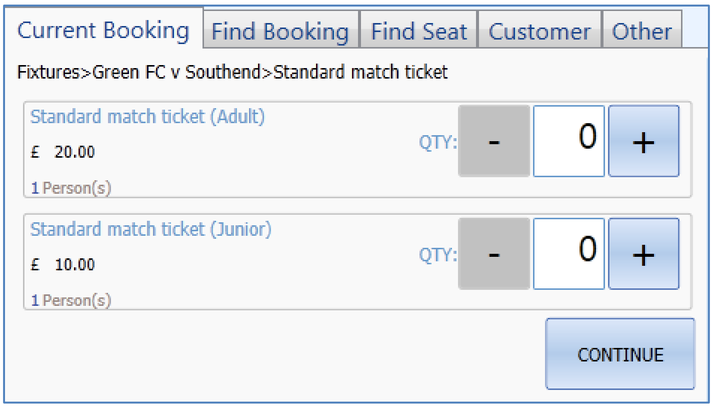
1. Selecting the ticket/product option.
2. Entering the customer's details.
3. Entering a beneficiary's details.
4. Taking payment.
5. Printing Tickets.

3.1. SELECTING THE TICKET/PRODUCT OPTION

The first step when taking a booking is to select the correct ticketing option:

1. On the Current Booking tab, select the appropriate option:
    - **Fixture.** Select to make a booking for a single match.
    - **Series.** Select to make a booking for a season ticket.
    - **Other.** Select to make a booking for an alternative product, for example a match programme.
2. The options available for the selected product type will be displayed. For example, if fixture is selected, all of the available matches will be listed as shown below:

3. Select the required product, for example the fixture.
4. Select the required ticket type, for example standard ticket.
5. The Tickets Required panel will be displayed allowing you to enter the customer's requirements:



6. Enter the number of tickets required for each product listed. The number of tickets required can be updated using either the **+** and **–** buttons, or by typing directly into the box provided.

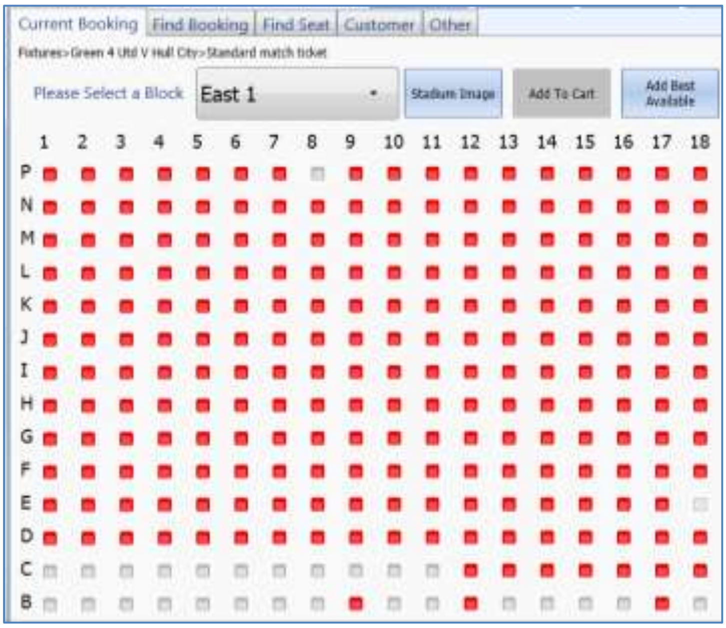
7. Once the customer requirements are complete, select **Continue**.

8. The Seat Picker screen will be displayed:

9. Select the block the customer wishes to be located in either using the drop-down list or by clicking on the stadium image (if available).

10. If the booking is being made for an **Away Game** and the capture of a mandatory pre-defined Block has been set up for the fixture, select the block from the drop down list. Select **Add To Cart**.

11. If the selected block is not seated, you will be automatically forwarded to the shopping cart, where the customer's requirements can be reviewed and paid for. However, if the selected block is seated, the seat picker will be displayed:

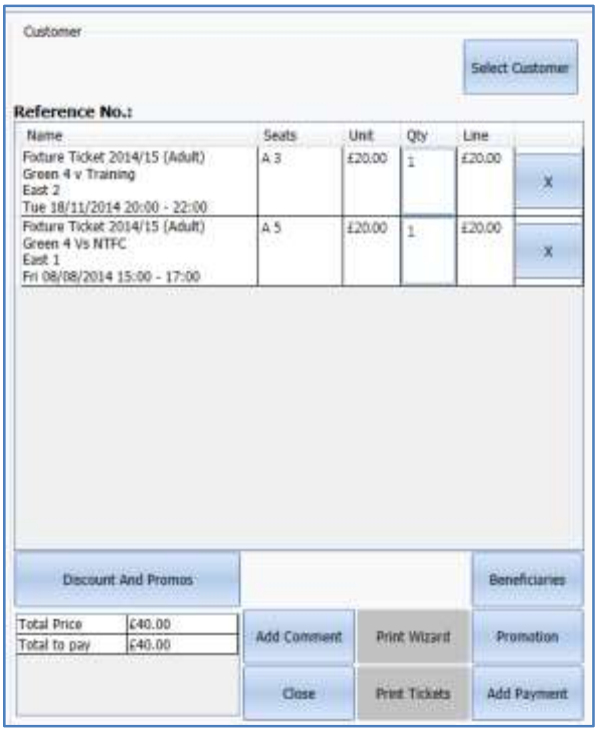


12. The following colours will be used to illustrate each of the seats available within the block:

- **Red.** Available seats.

- **Grey.** Unavailable seats (i.e. taken by another customer).
- **Crossed.** Not available for product type selected.
- **Yellow.** Currently selected seats.
- **Blue.** Only used for series ticket purchases. Indicate that the seat is not available for all fixtures in the series. When the seat is selected the fixtures that are unavailable will be listed. This option will only be available when your system is configured to allow partial series. See Partial Series Sales for more details.

13. To select seats click on the appropriate red seats. To pick multiple seats in a row, hold the shift key down when selecting the end seats required. Alternatively select **Add Best Available**, which will automatically select the best available seats in the selected block and transfer you to the shopping cart to complete the purchase. Note, when you hover over a seat the row and seat number will be displayed.
14. If you have manually chosen seats, select **Add to Cart** once your selections are complete. Note, the **Add to Cart** button will only be enabled once you have selected the correct number of seats.
15. The Shopping Cart will be displayed showing the details of the customer's purchase. You can continue to add additional items to the cart as described above (i.e. the customer can purchase tickets for more than one match at a time).



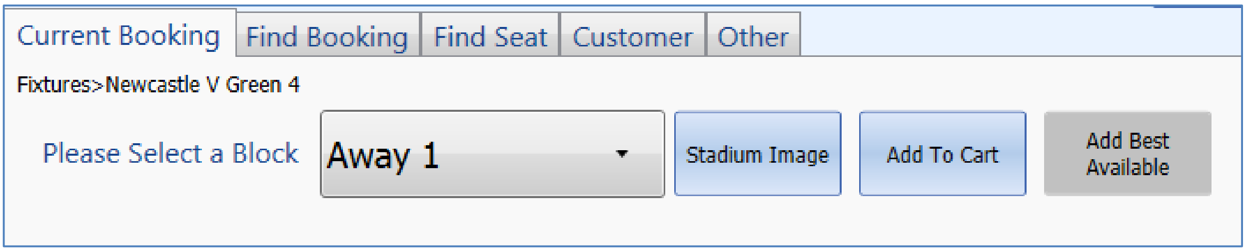
16. Once the shopping cart contains all of the items required by the customer, continue to the next stage of the booking process: Entering the Customer's Details.

Note: For more information about using the shopping cart see Shopping Cart – Additional Functionality.

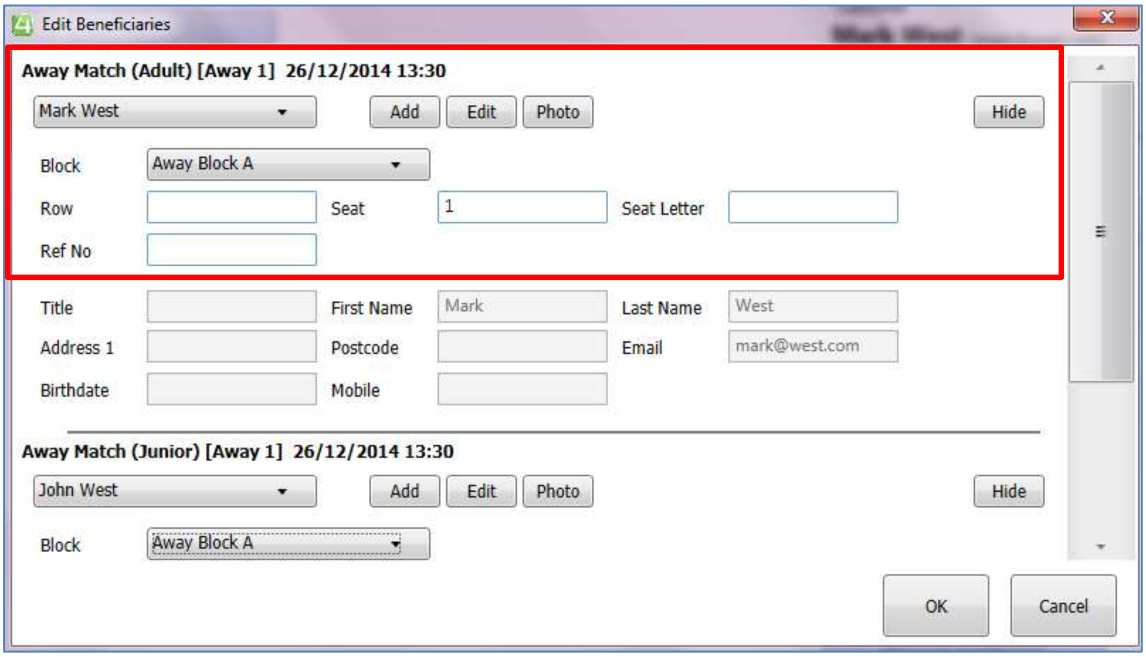
3.2. MAKING A BOOKING FOR AN AWAY GAME

If the booking is being made for an away game and the Away Venue Configuration has been set up in CRM, Block, Row, Seat, Seat Letter and Reference No. information can be captured for each beneficiary when making the booking. The booking process will be the same as for other bookings except for the following:

1. If Away blocks have been set up in CRM, you will be prompted to select the relevant block when making the booking.



2. When adding beneficiary details, additional fields will be available on the Edit Beneficiary screen:
    a. Block – depending on set up this will be a free format field or a drop down
    b. Row, Seat, Seat Letter and Ref No. will be free format and not mandatory
3. Complete away block and seat information for each beneficiary.
4. Select **OK.**
5. Select **Add Payment** and continue with taking payment for the booking.



3.3. CROSS SELLING A PRODUCT AT TIME OF SALE

If a product has been set up with a linked Cross Sell Product in CRM, at the point where the POS Operator goes to add the products to the shopping basket, a prompt to offer the customer an alternative product will appear.

In the example below:

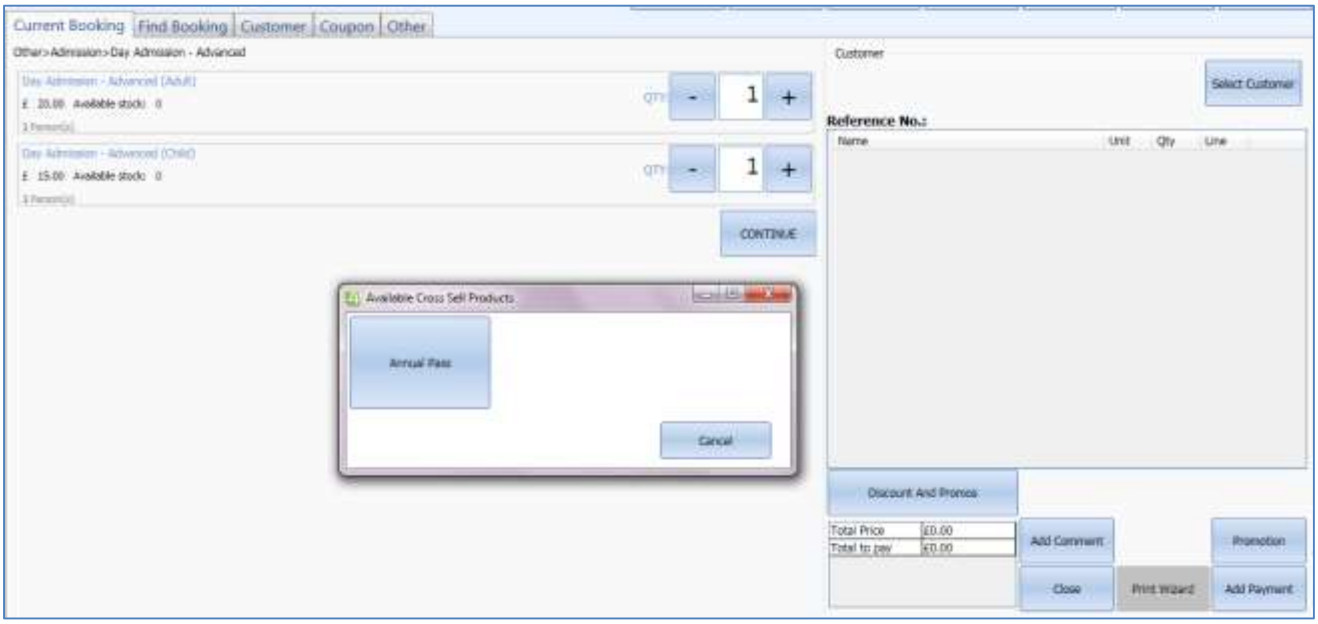
- A product has been set up called **Day Admission – Advanced.**
- A Cross Sell Product called **Annual Pass** has been set up as possible swap or replacement product to the **Day Admission – Advanced** product.
- The products have been set up under the option **Other** in the category **Admissions.**

1. On the Current Booking tab, select the option **Other**.

2. Select the category **Admission**.

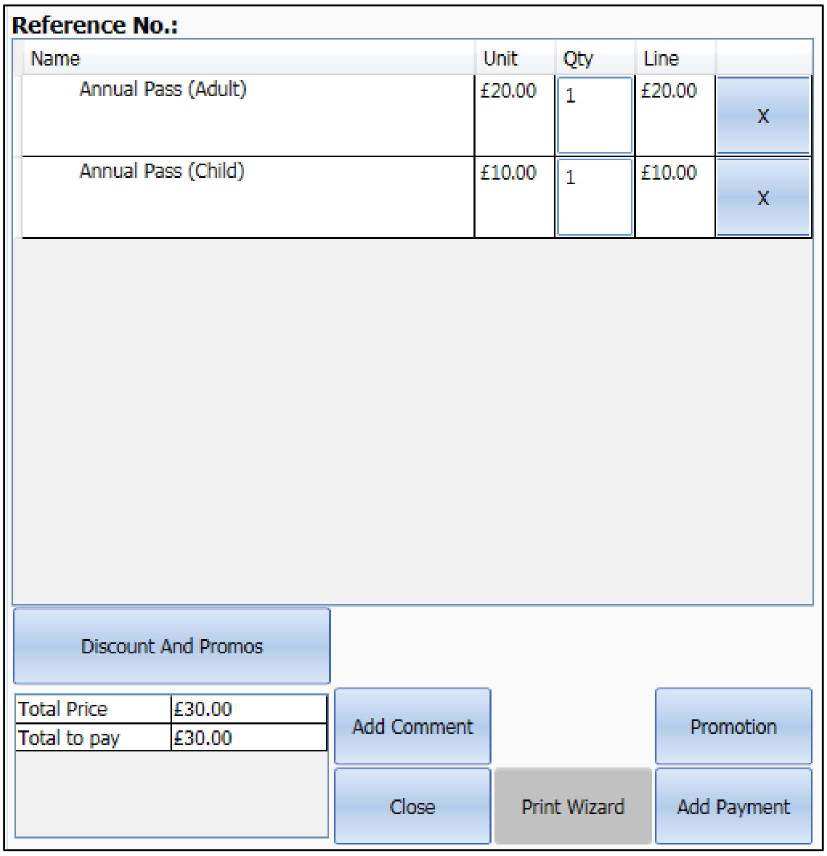
3. Select the product **Day Admission – Advanced**.

4. Enter the number of each item required and select **Continue.**
5. The system will recognise that there is an associated cross sell product and prompt the POS Operator to offer the customer the Cross Sell Product instead of the product originally requested. There would typically be some advantage to the customer in purchasing the cross sell product. If the customer does not want to change the product, select **Cancel** and continue with the sale of the original purchase



6. If the customer decides to purchase the cross sell product, **Annual Pass** is selected.

7. The shopping basket will populate with the cross sell product as shown below.



8. Processing of the sale can continue as normal. See sections Entering a Customer's Details and Taking Payment.

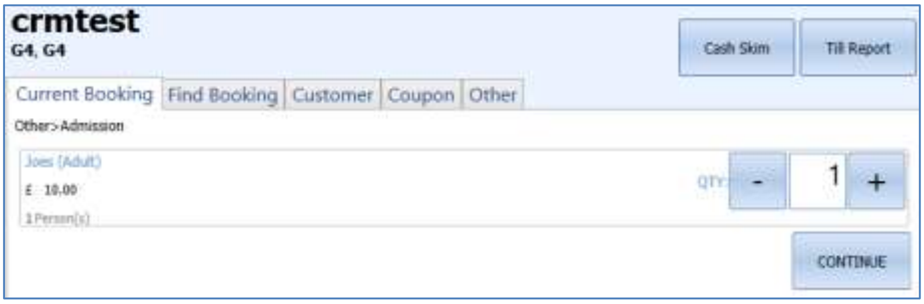
3.4. MAKING A BOOKING FOR AN AUTO SCHEDULED AND A SCHEDULED PRODUCT

An Auto Scheduled or Scheduled type product is typically set up for the selling of an activity e.g. a tour, an ice skating session or a ski lesson. A date and time needs to be selected when booking the booking is made. The difference between the two product types are:

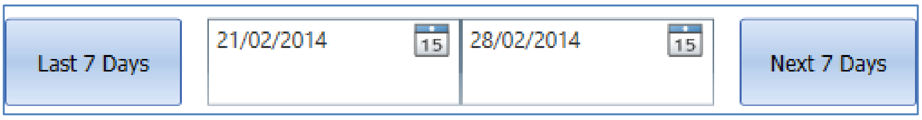
- An **Auto Scheduled** product typically recurs every day at set times generated by the system
- A **Scheduled** product has set times on specific days that have been manually scheduled on the scheduler

Both products are sold in the same way on the POS.

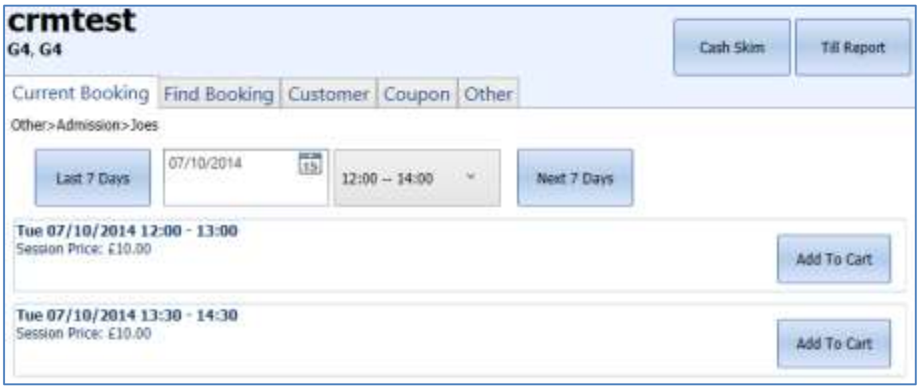
1. Select the relevant product which will be in the **Other** section.
2. Add the quantity of the product to be purchased and select **Continue**.



3. The sessions that have been set up in CRM as to when this product or activity is available will be displayed with the relevant time intervals e.g. 30 minutes, an hour etc. If the activity to be purchased is not for the current day, select the option **Next 7 Days** for additional date options.



4. Once the products required are shown, select Add To Cart.
5. Continue with completing the sale. See the section Taking Payment

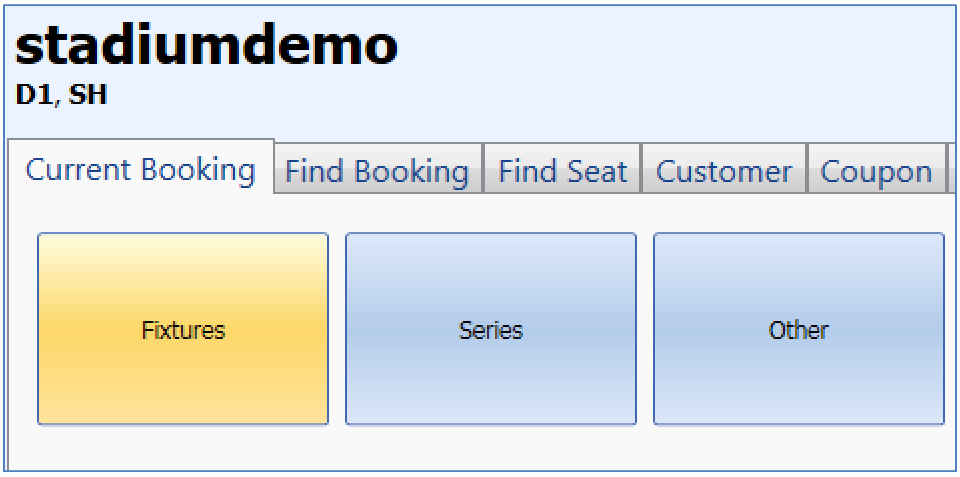


3.5. SELLING A DONATION PRODUCT FLAGGED FOR GIFT AID

When a product has been flagged in CRM as eligible for Gift Aid, the POS Operator will be prompted to apply a Gift Aid donation to the product at the time of taking payment. In order for the Gift Aid to be applied to the product sale, a valid Declaration by the end customer must be applied. Declarations are stored against the contact record in the system and can be created at the time of the sale if required. Gift Aid can be flagged as Optional or Mandatory, examples of both sales processes are shown below.

In this example the products set up in CRM are not type Fixture or Series so are located under option **Other**.

1. On the Current Booking tab, select the option **Other**.

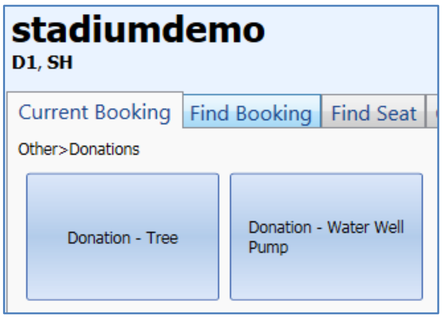


2. The categories for the different product types available will be displayed.

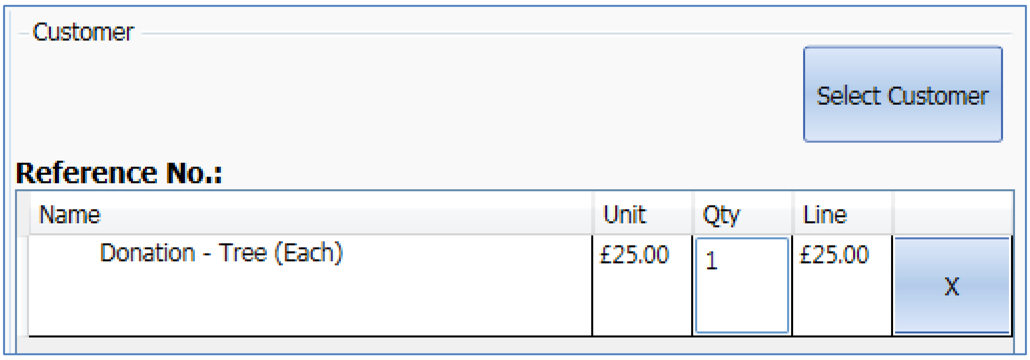
3. Select the required product category. In this example a donation product type is being 'sold' and is in the product category **Donations**.

GIFT AID MANDATORY AND COMPLETION OF A GIFT AID DECLARATION

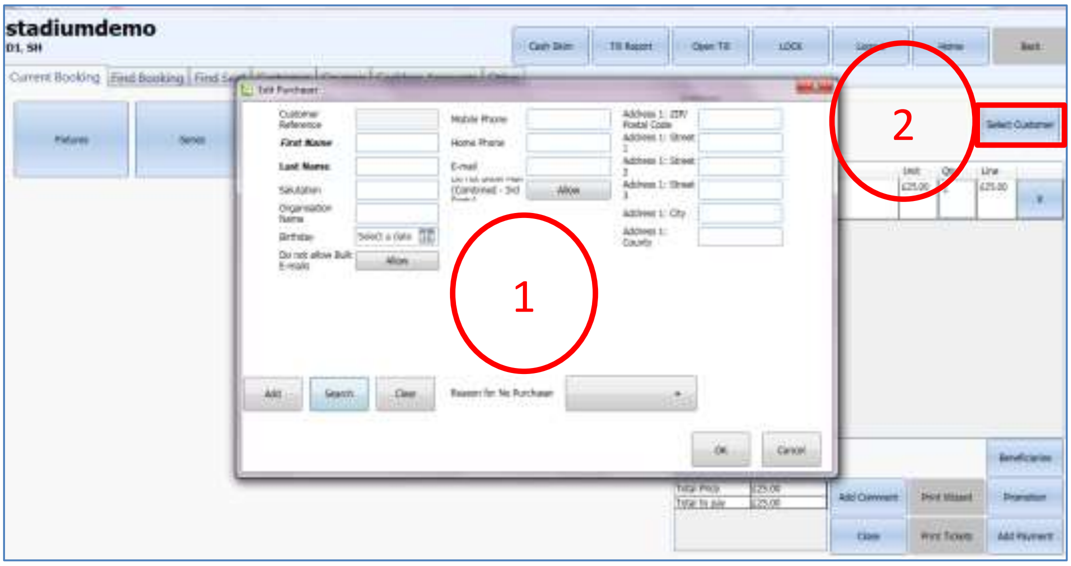
1. A product called 'Donation-Tree' has been set up for this example. Characteristics of this product are:
    - The Donation Percentage of this product is set to 100% i.e. Gift Aid will be calculated on the full value of the product.
    - Gift Aid flagged as Mandatory i.e. the product cannot be sold without Gift Aid and therefore a valid Declaration will need to be in place for the customer making the purchase.
        1. If the customer does not have a valid declaration stored in the system and is not willing or cannot complete a declaration at the time of sale, the product will have to be removed from the shopping basket.
        2. If the customer does have a valid declaration stored in the system Gift Aid will automatically be applied.
        3. If the customer does not have a valid declaration stored in the system and wants to contribute Gift Aid, Declaration details can be captured at the time of the sale
    - This product has set pre-set up as a donation amount of £25.00.
2. Select the **Donation – Tree** product.



3. As the product has been set up with a zero value, an amount can be selected using the numbered buttons, else a value can be entered in the **Donation Value** box.
4. Select **Continue** to add the item to the shopping basket as shown below.

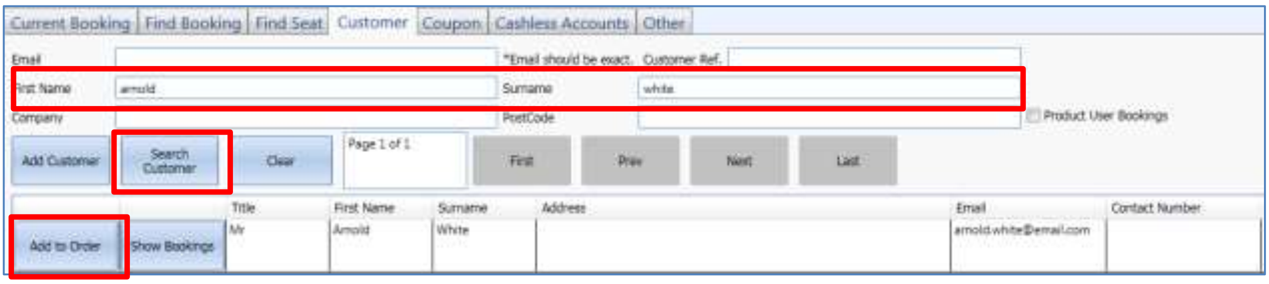


5. As this product has been flagged as eligible and mandatory for Gift Aid, a declaration for the purchaser will need to be validated before the sale is completed i.e. customer details will need to be entered to verify that a declaration exists.
6. On selection of **Add Payment**, the POS Operator will be prompted to enter the customer's details and will not be able to complete the sale without this step. Various options are available for adding a customer's details:
    - Option 1 – using the Edit Purchaser form search for an existing customer or Create a new customer if they do not exist in the system
    - Option 2 – close the Edit Purchaser form and click the button **Select Customer**

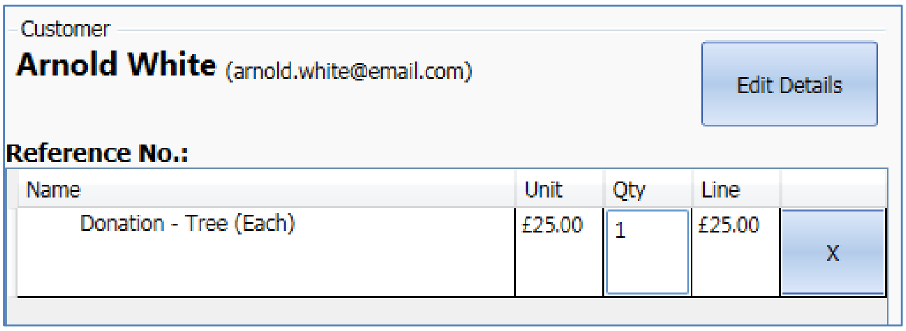


Refer to the section Entering the Customer's Details for more information on each of these options.

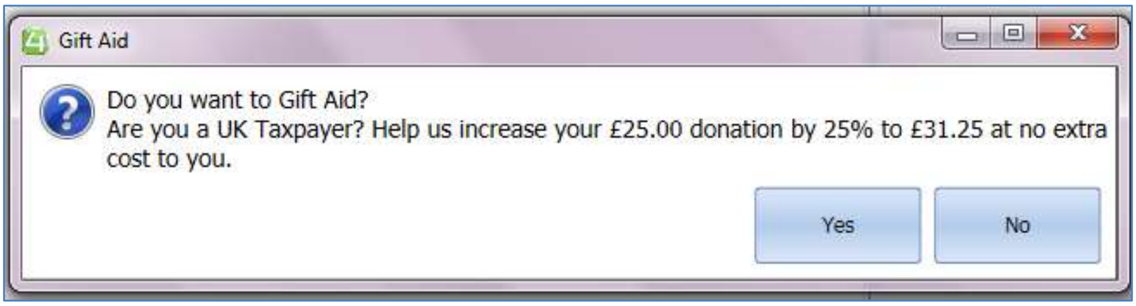
7. In this example, click on the **Select Customer** button (No. 2).
8. The Customer tab will open. Enter the customer's **First Name** and **Surname**.
9. Click on **Search Customer**. Any related records to the names entered will be displayed.
10. If this is the correct customer, click on **Add to Order**.
11. If the customer does not exist in the system, the **Add Customer** option should be selected.



12. The customer's details will be added to the shopping basket section as shown below.



13. When **Add Payment** is selected, the prompt for making a Gift Aid donation will be displayed.



Note: The amounts of Gift Aid applied to the product are set up in CRM and depend on the following:

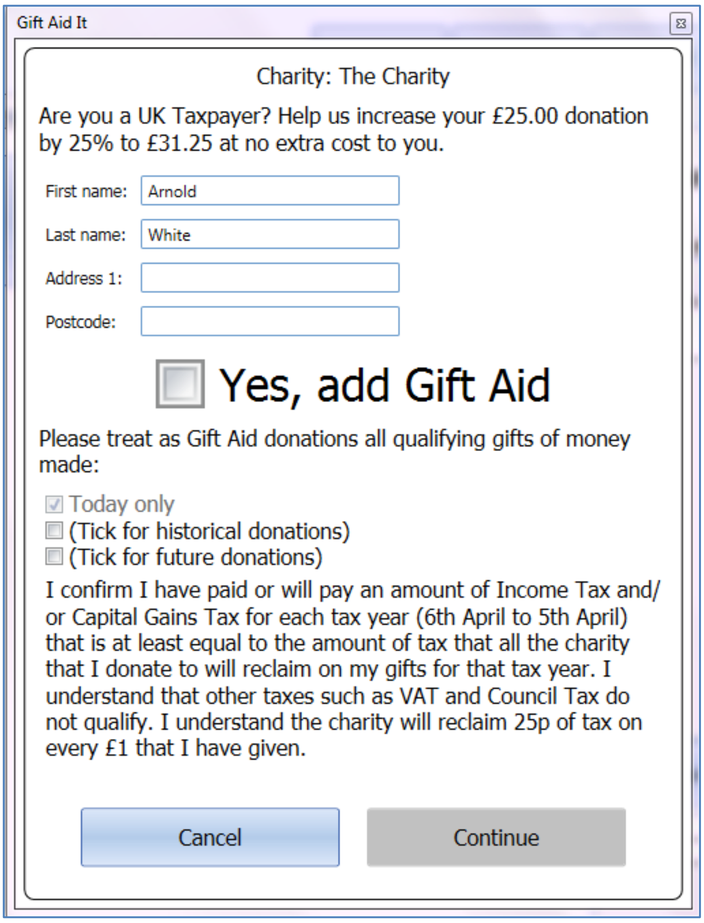
- The percentage Gift Aid that can legally be applied to a donation as per HMR&C Legislation
- The percentage value of the product that Gift Aid can be applied i.e. if only 50% of a £10 product is eligible for Gift Aid, this will be set up in CRM and the HMR&C Gift Aid rate will only be applied to £5
- In this example, the HMR&C Gift Aid Rate is 25% and this product Donation Percentage is 100% i.e. Gift Aid at 25% is applied to the total value of the product

---

14. If the customer decides at this point not to contribute Gift Aid, **No** is selected.
15. The message below will appear and the POS Operator will need to select **OK** and remove the product from the basket as Gift Aid has been set as Mandatory for this product. The sale of this particular product cannot continue.

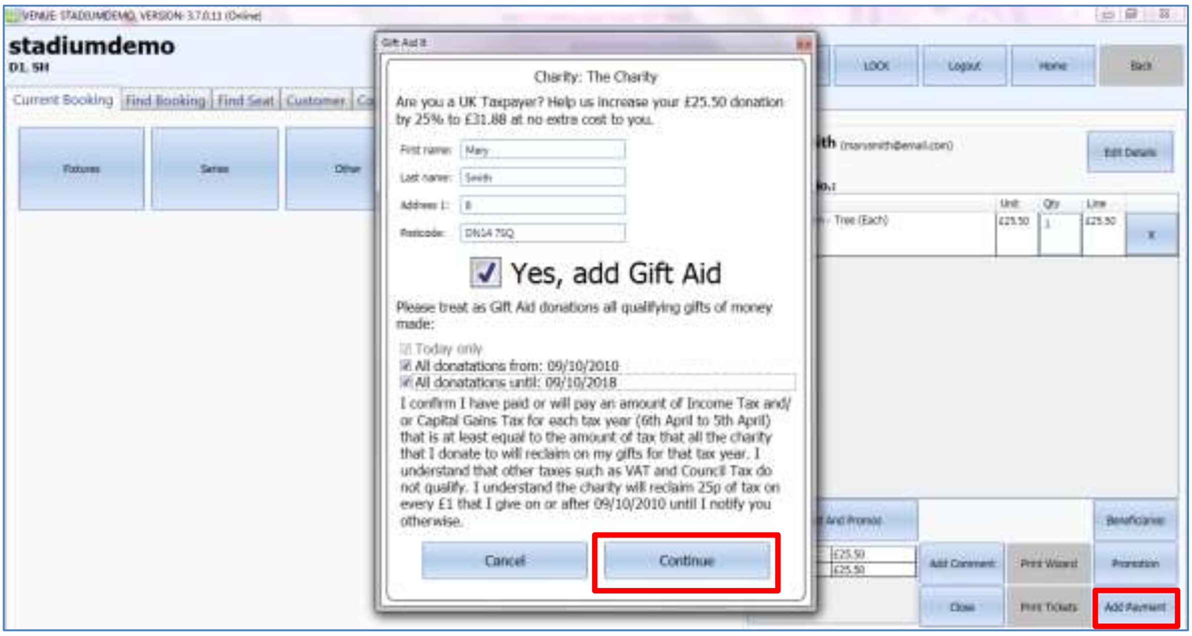
16. If the customer agrees to contribute Gift Aid, the **Yes** option is selected. The system will check if a valid Declaration exists for the customer.

17. If a valid declaration does not exist, the POS Operator will be prompted with a Declaration form and will need to verbally obtain Declaration details and confirmation from the customer.



18. The minimum requirements for a declaration are:

- **The Charity name.** Appears on the form as per CRM set up
- **First Name and Last Name.** Populated from the customer search
- **Address 1 and Postcode.** The house number and Postcode need to be captured here and will update the contact record
- **Confirmation of Declaration**. Select the **Yes, add Gift Aid option.** This selection will default the **Today only** option and apply the Declaration to the donation made today only.
- **The tick box options for historical and future donations** are optional and if selected will store a valid Declaration against this customers contact record for all past and future donations as per the dates specified



19. Once the Declaration is complete, select **Continue** to return to the Current Booking screen.

20. Select **Add Payment** to complete the booking.

21. See section Taking Payment to complete the sale.

GIFT AID OPTIONAL – GIFT AID DECLARATION EXISTS

1. A product called **Donation – Water Well Pump** has been set up for this example. Characteristics of this product are:

   - The Donation Percentage of this product is set to 50% i.e. Gift Aid will be calculated on 50% of the value of the product.
   - Gift Aid flagged as Optional i.e. the customer will be asked to contribute Gift Aid but it is not mandatory for the sale of the product.

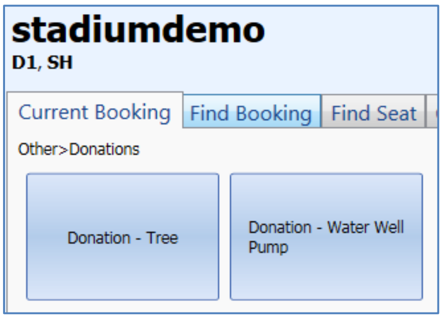
      i. If the customer does not have a valid declaration stored in the system and is not willing or cannot complete a declaration at the time of sale, the product can still be sold and no Gift Aid amount applied.

      ii. If the customer does not have a valid declaration stored in the system and wants to complete a declaration at the time of sale, declaration details can be captured.

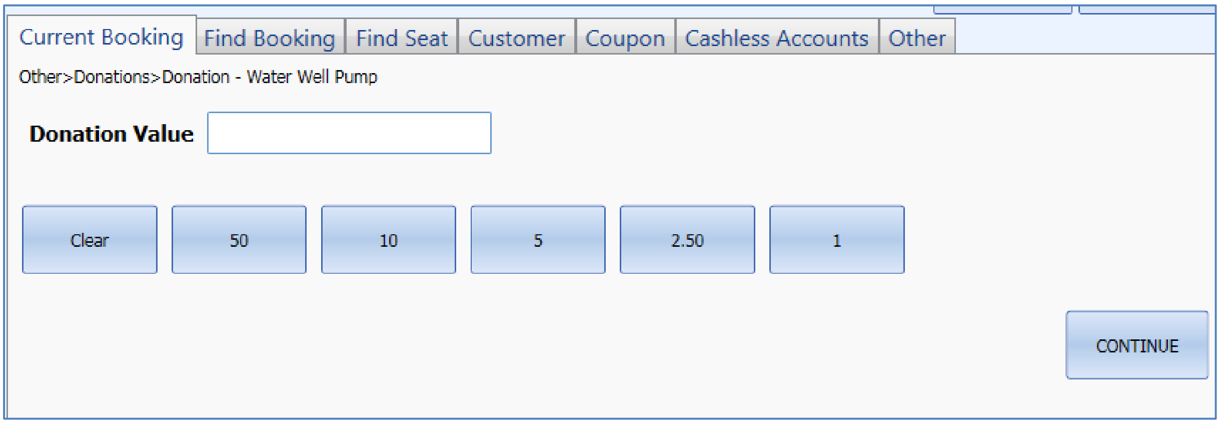
      iii. If the customer has a valid declaration stored in the system Gift Aid will automatically be applied.

   - This product has set with a value of zero and the customer will be prompted to select the amount to be donated.

2. Select the **Donation – Water Well Pump** product

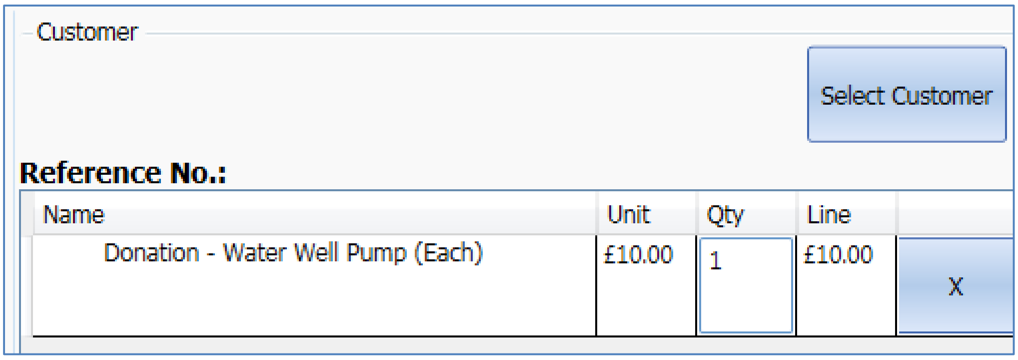


3. The product value options will be displayed.



4. Enter a **Donation Value** or select one of the value buttons displayed.

5. Select **Continue** to add the item to the shopping basket as shown below.

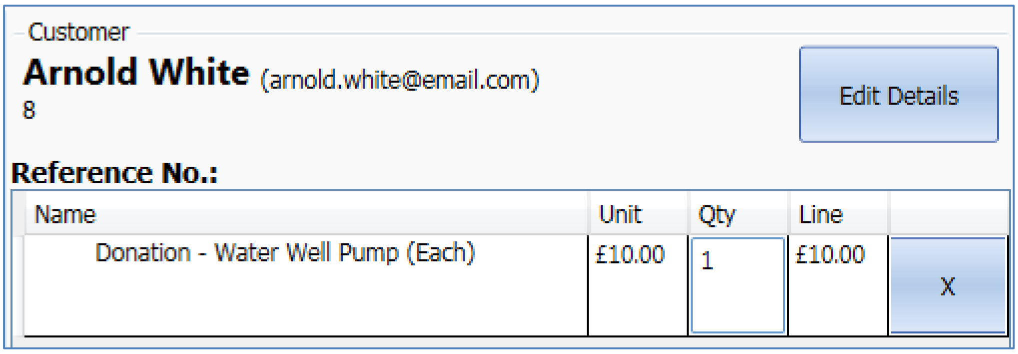


6. As this product has been flagged as eligible and optional for Gift Aid, the end customer will be prompted to contribute Gift Aid. If **Add Payment** is selected, the POS Operator will be prompted to enter the customer's details.

7. In this example, click on the **Select Customer** button and enter the customer's **First Name** and **Surname** in the fields provided on the Customer tab.

8. Click on **Search Customer**. Any related records to the names entered will be displayed.

9. Click on **Add to Order**.



10. The customer's details will be added to the shopping basket section as shown above.
11. In this instance, because the selected customer Arnold White has a valid Declaration in the system, when **Add Payment** is selected, the prompt for making a Gift Aid donation is not displayed and Gift Aid is automatically applied to the purchase. If the customer did not have a valid Gift Aid Declaration in place, one would have to be completed.
12. Select **Add Payment** to complete the booking.

Note: In this example, the Donation Amount of the product was set to 50%, therefore Gift Aid was only applied to £5 i.e. the total Gift Aid value was £1.25.

---

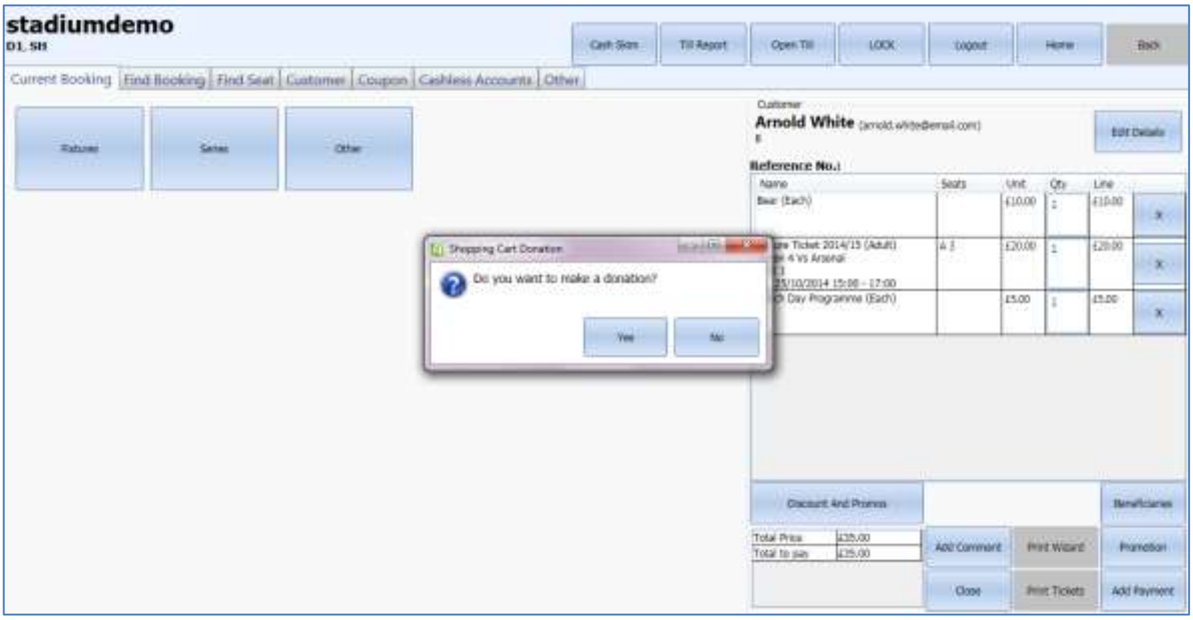
13. See section Taking Payment to complete the sale.

CANCELLING A DECLARATION

If a customer's circumstances change and they are no longer paying tax as specified for Gift Aid Donations, a Declaration can be cancelled. See section Customers Detail Dialog.

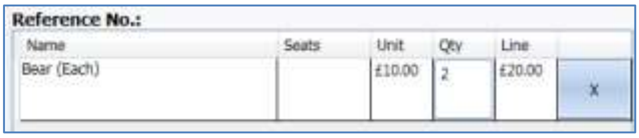
3.6. SHOPPING CART DONATION PROCESS

If a Shopping Cart Donation product has been set up in CRM against the POS Channel, at the Add Payment step of the sale, the POS Operator will be prompted to add a Donation to the shopping basket.



1. If the customer does not want to make a Donation, select **No** and continue with Add Payment.
2. If the customer wants to make a Donation select **Yes**.
3. The following Donation screen will be shown:

4. The following options are available:
   - **Donation Value.** It is possible to enter in an amount specified by the customer in the Donation Value area, any value could be entered here.
   - **Channel Percent**. When this option is selected the Donation Value suggested will be a percentage amount of the total shopping basket value. In the example below, the shopping basket value is £20, the Channel Percentage has been set to 10% so the Channel Percent Donation Value equals £2.



- **Shopping Cart Round-up.** When this option is selected the Donation Value will round up the shopping basket value to the nearest £1. If the value is already rounded, there will be no change. In the example below, the shopping basket value is £21.50 and the suggested Donation Value is £0.50.

- **Fixed Amount.** When this option is selected the Donation Value will be as set up in the Booking Product Default Donation Amount. In the example below, the Fixed Amount is set to £1.

5. If either of the above options are required by the customer, select Continue to add the Donation to the shopping basket.
6. If either of the above options are not required by the customer, select cancel and continue with processing the sale.

Note: If the Shopping Cart Donation product is eligible for Gift Aid, the prompts for Gift Aid will be applied as described in the Selling a Donation Product Flagged for Gift Aid section.

3.7. ENTERING THE CUSTOMER'S DETAILS

Once the shopping cart details are complete you can optionally assign a customer to the booking. Two options for assigning a customer to a booking are available:

- Use an existing customer.
- Create a new customer.

USING A BARCODE SCANNER

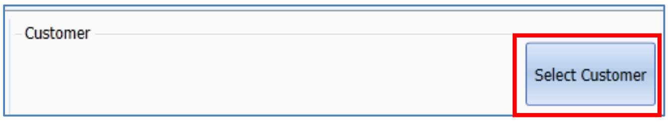
If you have a barcode scanner attached to the terminal and the customer has an existing ticket, scanning the ticket will automatically add the customer details to the booking.

USING AN EXISTING CUSTOMER

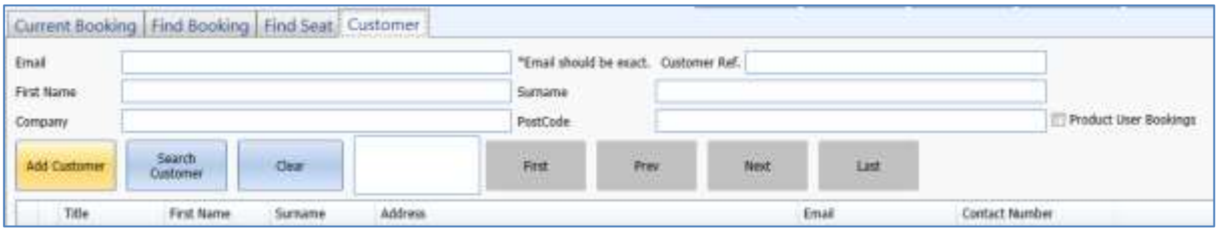
Note: Customer details can be added as part of the payment process.

To use the details of a customer who already exists within the system carry out the following:

1. At the top of the shopping cart select the **Select Customer** button:



2. The Customer screen will be displayed:



3. Enter one or more of the following details about the customer:

   - **Email.** Enter the customer's email address. The address entered must exactly match the entry held in the system.
   - **Customer Ref.** Enter the customer's unique reference number.
   - **First Name.** Enter the customer's first name. It is not necessary to enter the customer's full name, for example entering Ste will find Steve, Steven, Stephen, etc.
   - **Company.** Enter the customer's company (if a corporate customer). It is not necessary to enter the full company name.
   - **Surname.** Enter the customer's surname. It is not necessary to enter the customer's full name, for example entering Rob will find Robinson, Roberts, etc.
   - **Post Code.** Enter the customer's postcode. It is not necessary to enter the customer's full post code.

4. If you wish to include customers that have been added as beneficiaries select the **Product User Bookings** check box.

5. Once you have entered one or more search terms, select **Search Customer**.

6. Any records found to match the search term entered will be listed below the search terms:

7. If the correct customer appears in the list, select **Add to Order** alongside their details.

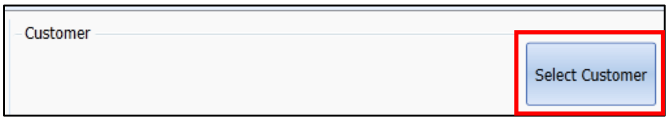
8. The shopping cart will be re-opened with the customer's name displayed at the top.

9. If the customer's details cannot be found, their details can be added to the system as described below.

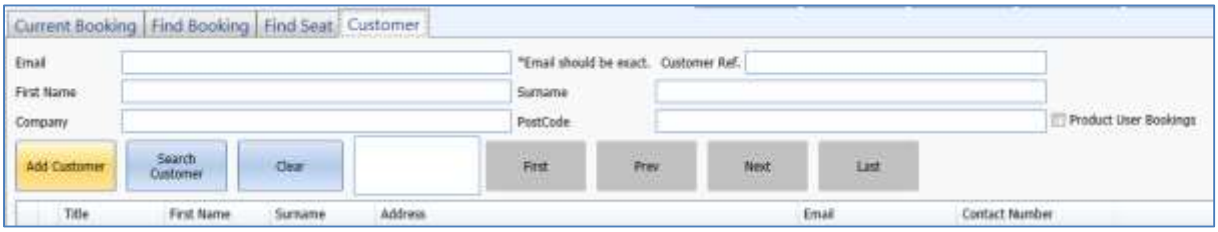
CREATING A NEW CUSTOMER

To create a new customer:

1. At the top of the shopping cart select the **Select Customer** button:



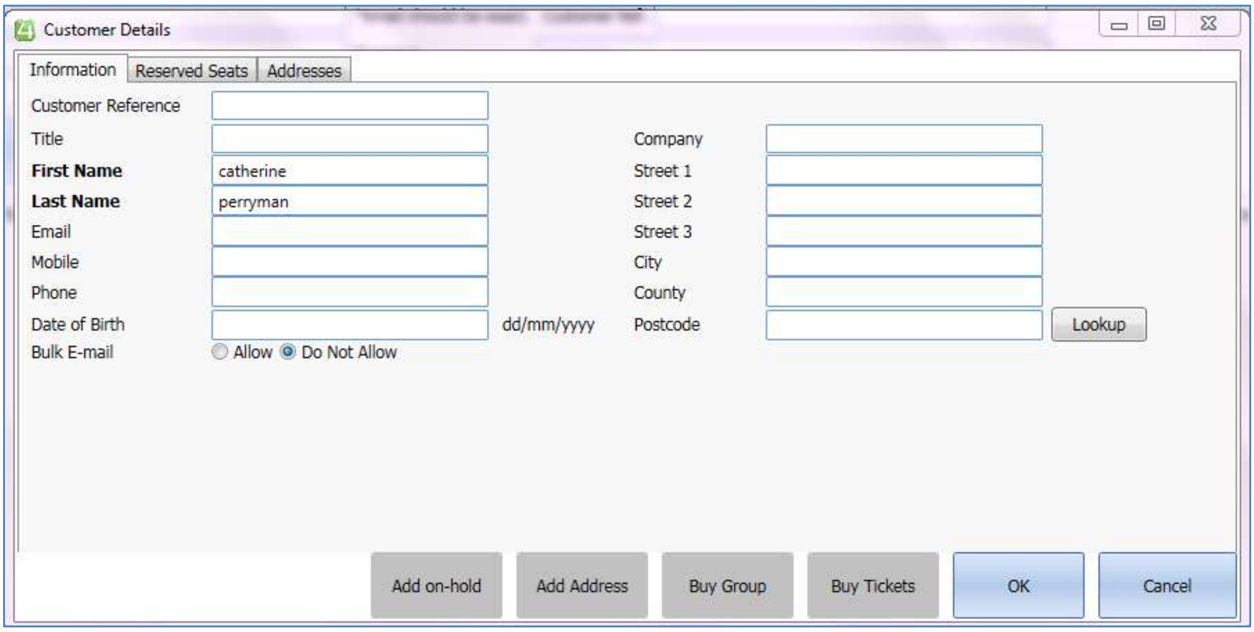
2. The Customer screen will be displayed:



3. Carry out a customer search (as described above) to ensure the customer's details have not been previously added to the system.

4. To add new customer details, select **Add Customer**.

5. The Customer Details screen will be displayed:



6. The Customer Reference field will be auto populated when **OK** is selected.

7. Enter the requested details, ensuring that all fields marked with bold text are completed.

Note: If you have postcode lookup enabled you can enter the individual's address by entering the customer's postcode before selecting **Lookup**. Pick the appropriate address from the list of addresses returned.

---

8. Select **OK** to confirm the details.

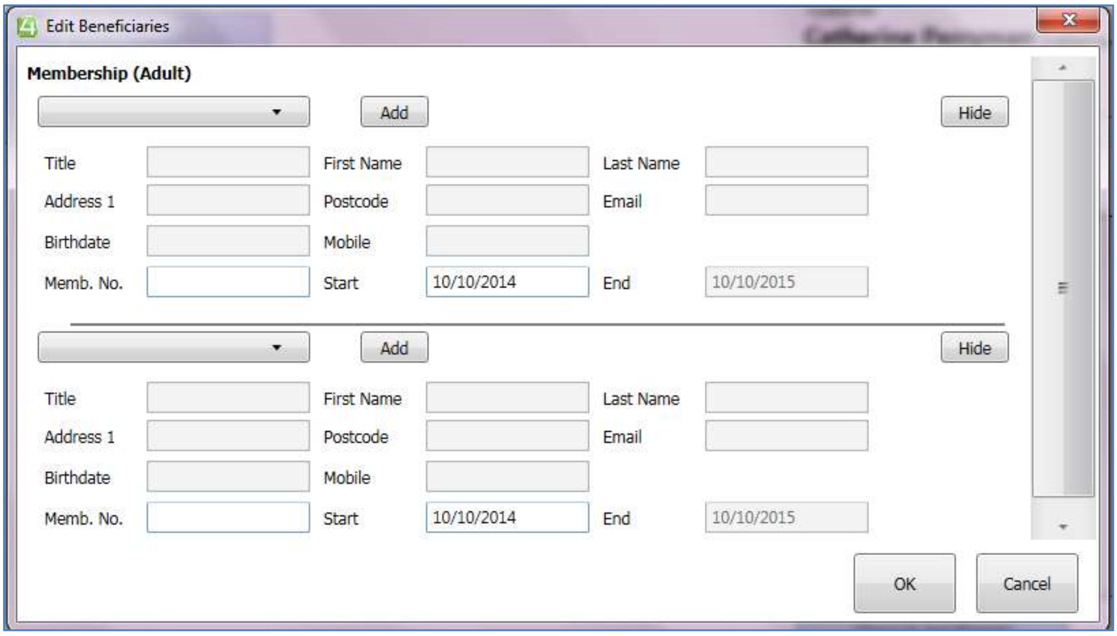
9. The Customer screen will be re-opened displaying the newly added customer. Select **Add to Order** alongside the customer's details to continue.

10. The shopping cart will be re-opened with the customer's name displayed at the top.

3.8. ENTERING THE BENEFICIARY'S DETAILS

Once the customer's information has been collected you will be prompted to capture beneficiary details. These are the individuals who will be using the tickets. When **Add Payment** is selected, the screen below will appear. Alternatively:

1. Select **Beneficiaries.**
2. The Edit Beneficiaries screen will open.

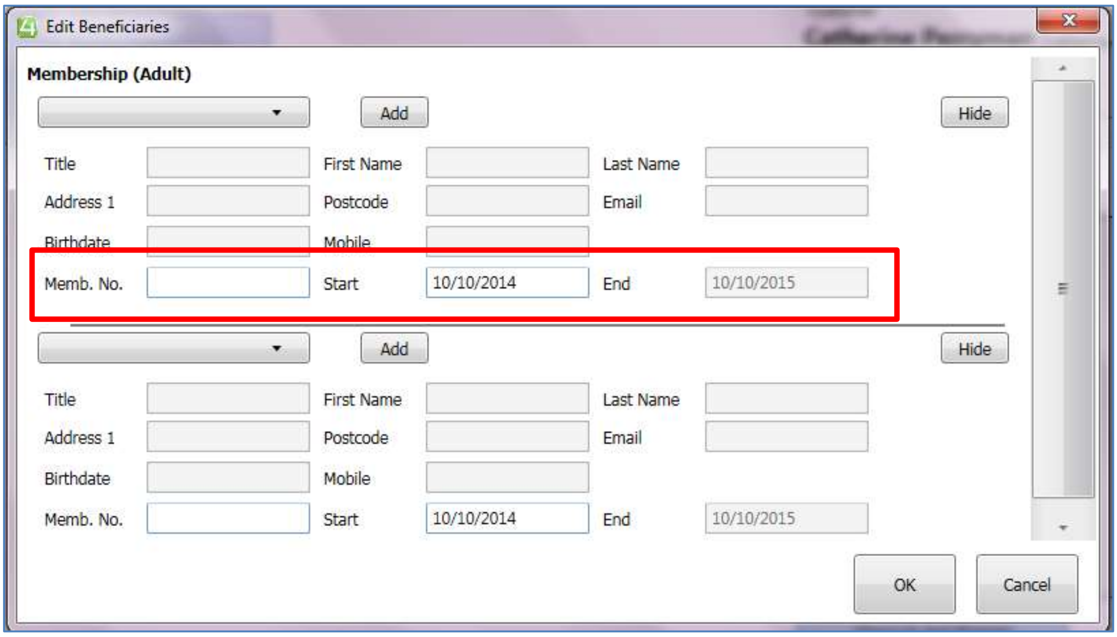


3. Complete the beneficiary details for each ticket listed, the name of the customer making the booking will be available in the drop down list and can be assigned as a beneficiary of the ticket.
4. If a different contact is to be assigned as beneficiary of the ticket, select **Add.**
5. Enter the beneficiary's First Name, Last Name and select **Search.**
6. If the beneficiary does not exist in the database select **Add** and enter in the contact details.
7. Select **OK** to return to the Edit Beneficiary screen.
8. **Select OK** to complete the entry of beneficiaries.
9. **Select Beneficiaries** to make any changes to the beneficiary information captured.
10. **Select Add Payment** to continue with taking payment for the booking.

Note: Collection of beneficiary information will depend on the set up of the Bookable Product in CRM. There are three settings, Required, Requested or Not Required. If the setting is Required, it will be mandatory to collect this information. If a beneficiary is On Hold, an alert will be generated and the sale cannot proceed.

CAPTURING MEMBERSHIP NUMBERS

1. If the product being purchased is a Membership, the Membership No. can be captured in the **Memb. No.** field as can the start date of the membership in the **Start field**.
2. If you have a barcode scanner attached to the terminal and the customer has an existing membership number as a barcode on a card, scanning the card will automatically add the membership number here.

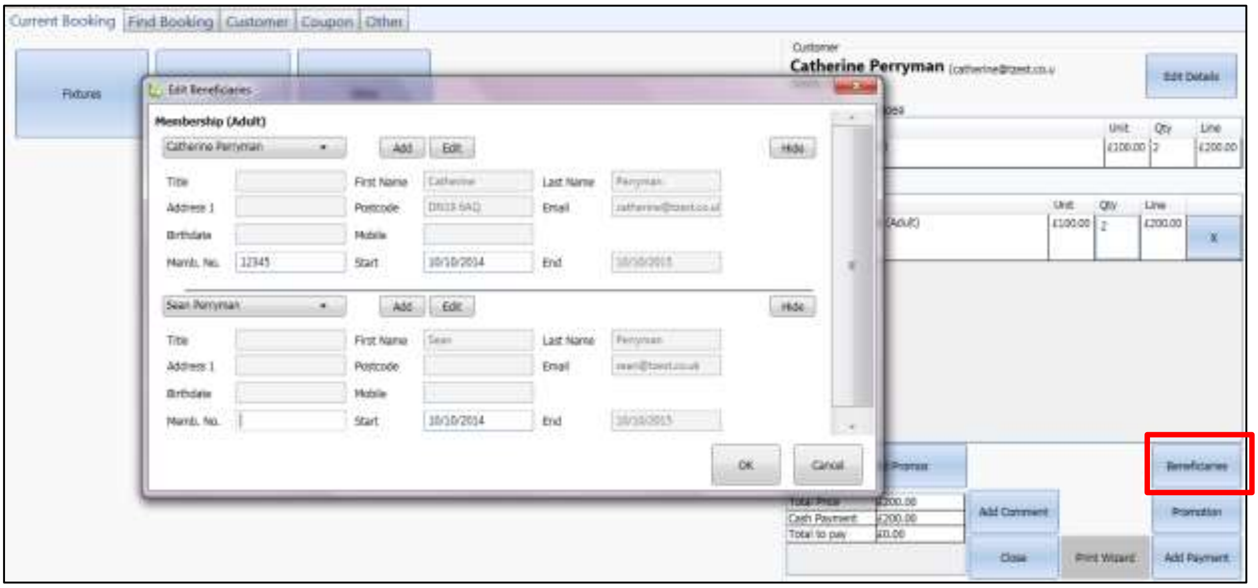


3. If the membership number(s) captured already exist in the system, the system will prompt that the membership number is already in use. All the duplicate numbers will be listed.

Membership numbers can be captured or updated retrospectively via the POS. To update membership numbers of an existing booking:

1. Search for the booking by selecting the **Find Booking** tab and entering either the **Booking Reference Number or Firstname and Surname.**
2. When the correct booking is displayed, select **Amend Booking.**

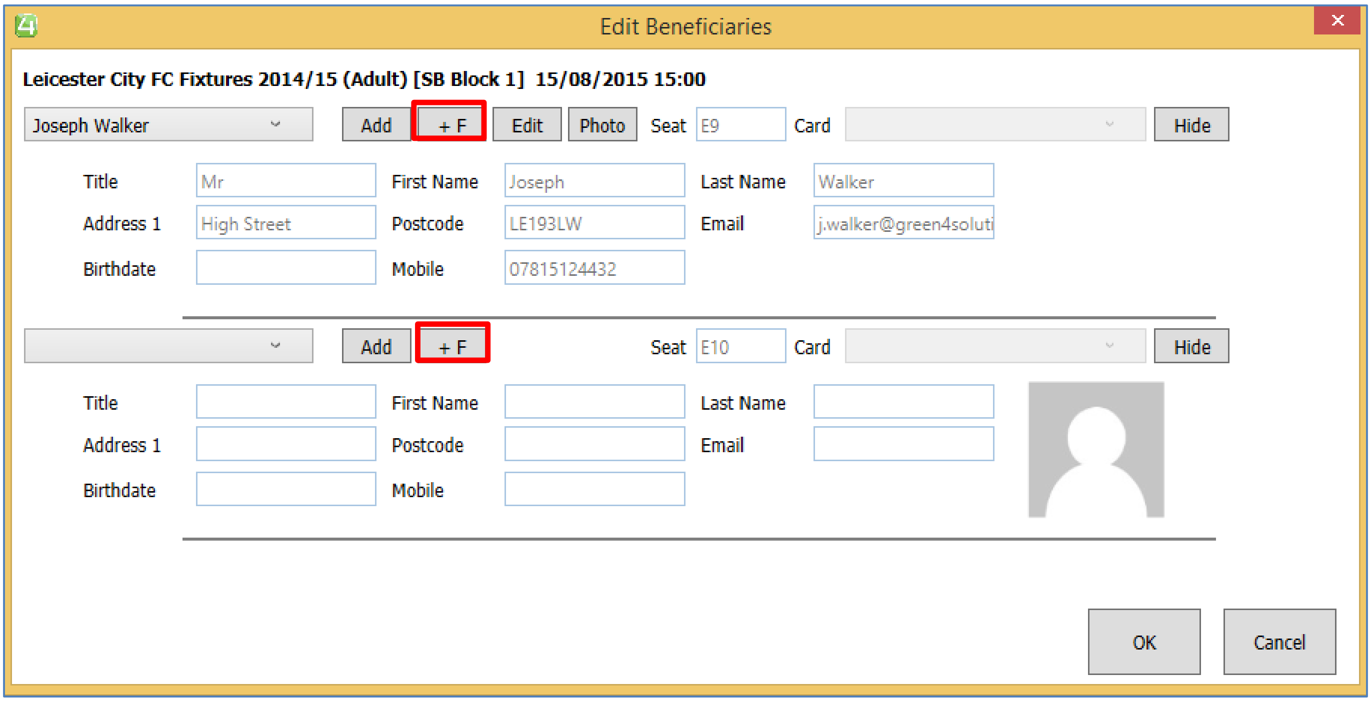
3. The booking information will be displayed in the shopping basket area, select **Beneficiaries**. The Edit Beneficiaries dialog box will be displayed and the Membership Number for each Beneficiary can be entered or updated. A barcode scanner can also be used at this point to capture the Membership Number from an existing card.



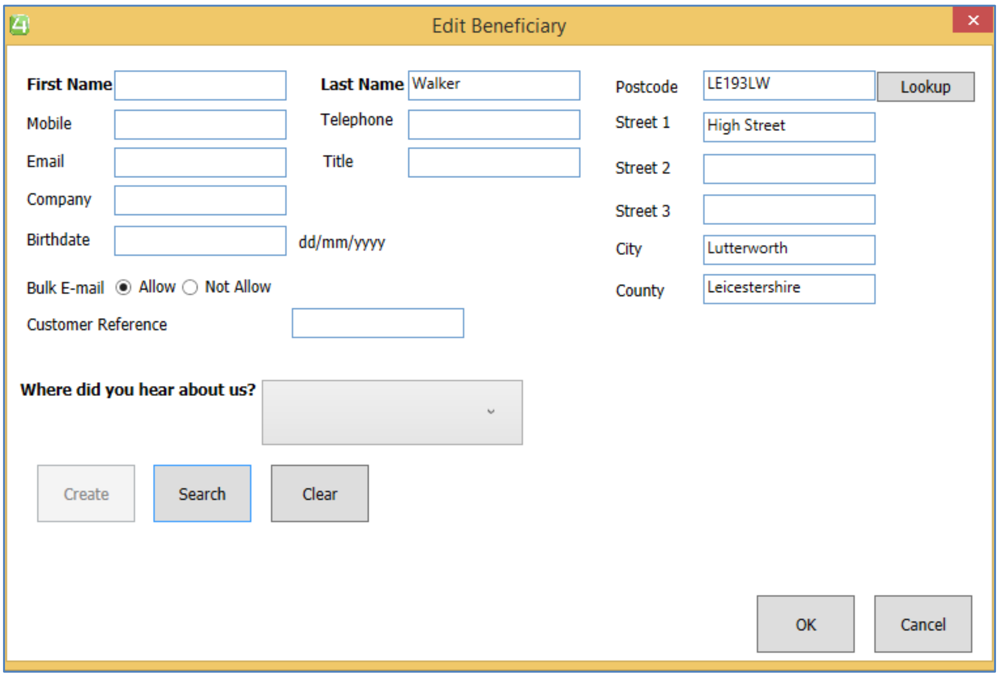
Note: If the system has been set up to auto generate membership numbers and the corresponding setting for the membership number field set to Read Only, the membership number cannot be captured, but will be auto populated on purchase of a membership type product.

ADDING A FAMILY MEMBER ON THE EDIT BENEFICIARIES SCREEN

It is now possible to use the **+F** button on the Edit Beneficiaries dialog to add a family member to an order when more than one product is being purchased. The **+F** button is highlighted below



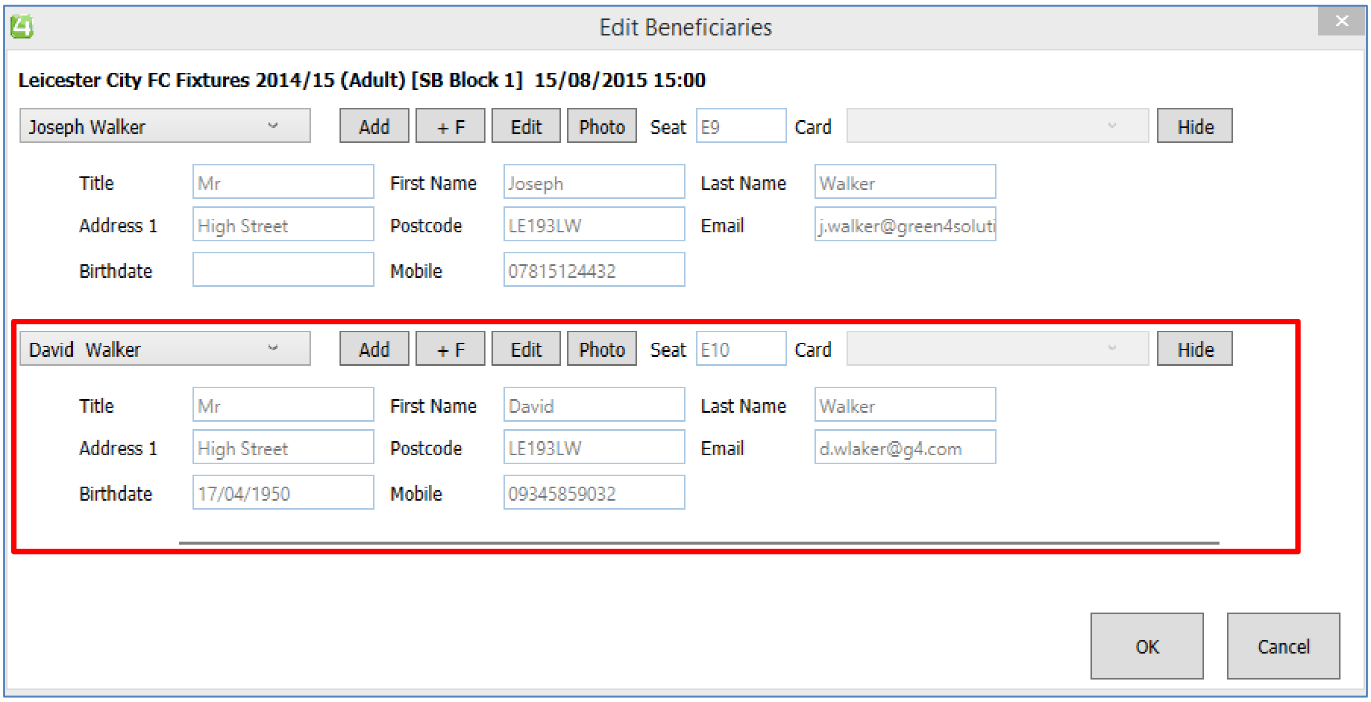
When the **+F** button is selected a new Edit Beneficiary dialog will be displayed, here the dialog is pre-populated with the common details from the first purchaser such as the Last Name and Address.



The remaining fields will then need completing to add the family member to the order. Upon completing the details select **Search**, if the customer already exists in the system it will be possible to select them from a list of Previous Users, before **Ok** can be chosen to add the Beneficiary.

If the customer does not already exist in the system after selecting Search a Message will appear confirming that no matching customers were found. The Beneficiary can then be added to the system by selecting **Create.**

The Edit Beneficiaries screen will reappear with the appropriate family member added as a Beneficiary.



Select **OK** to continue purchasing the product.

3.9. TAKING PAYMENT

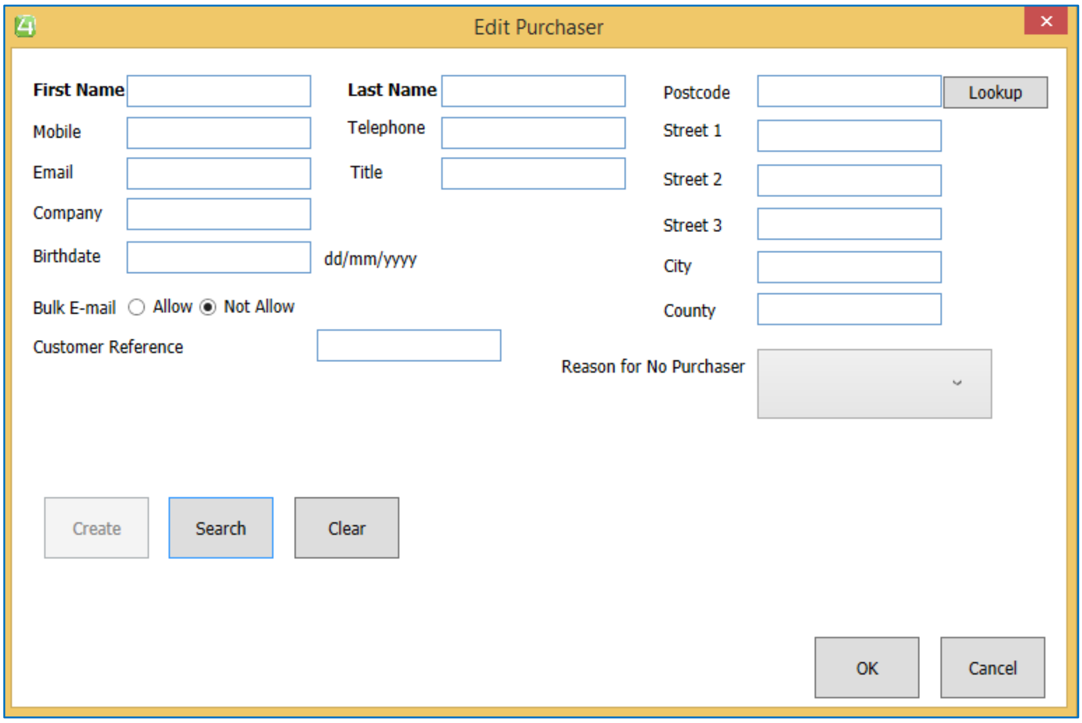
Once the shopping cart details are complete you can take payment for the booking:

1. Select **Add Payment**.

Note: If a cash account has been set up for the terminal the Speed Checkout option will be available. This option does not collect name and address details. This option should not be used for tickets that require beneficiary details.

---

2. If you have not added a customer's details to the order, the Edit Purchaser dialog will be displayed. The Edit Purchaser dialog can be used to:
   - Add an existing customer to the booking.
   - Create a customer record.
   - Give a reason for not adding a customer's details to the booking.



3. Complete the required action before selecting **OK**. See the Edit Purchaser Dialog section for more details.
4. If the multiple addresses functionality is enabled you will be prompted to select the delivery address for the purchased products. See Selecting Delivery Addresses for more information.
5. If a product included in the shopping cart is set to require or request beneficiaries, the Edit Beneficiaries dialog will be displayed. Complete the required information before selecting **OK**. See Adding Beneficiaries for more information about adding the details of beneficiaries.
6. The Payment Method screen will be displayed:

7. Select the appropriate option to continue.

8. The relevant payment screen will be displayed. Complete the requested information.

Note: The payment options available to you will depend upon your system configuration and may differ to those shown above.

---

9. Once the payment details have been completed, select **Pay** to continue.

10. The shopping cart will be updated to show the amount paid (and the outstanding balance if applicable):

Total Price	£100.00
Cash Payment	£20.00
Chip and Pin Payment	£50.00
Total to pay	£30.00

11. If the full balance has not been paid, select an alternative payment method to complete the purchase.

Once full payment has been taken, you will be ready to proceed to the next stage of the booking process: Printing Tickets.

Note: If you are not printing tickets immediately, but instead using the ad-hoc batch printing option (see Batch Printing) click **Close** to complete the booking.

EDIT PURCHASER DIALOG

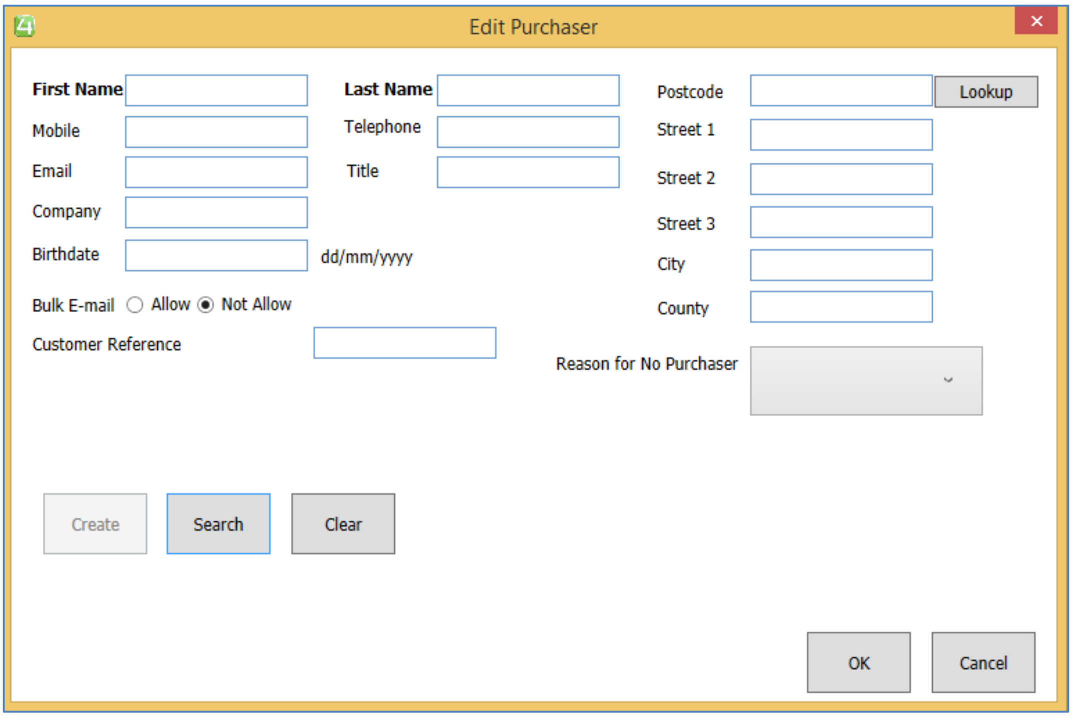
The following sections describe how to use the Edit Purchaser dialog to:

- Search for an Existing Customer
- Edit an Existing Customer's Details
- Create a Customer Record
- Complete a Booking without Selecting a Customer

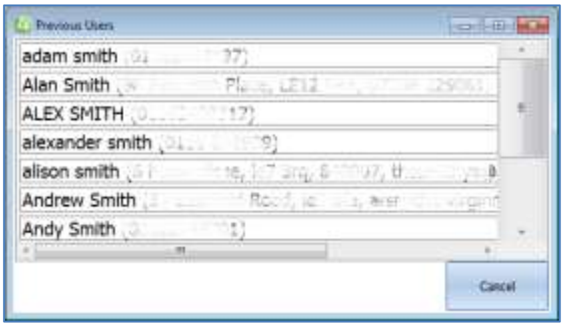
Search for an Existing Customer

To search for a customer using the Edit Purchaser dialog:

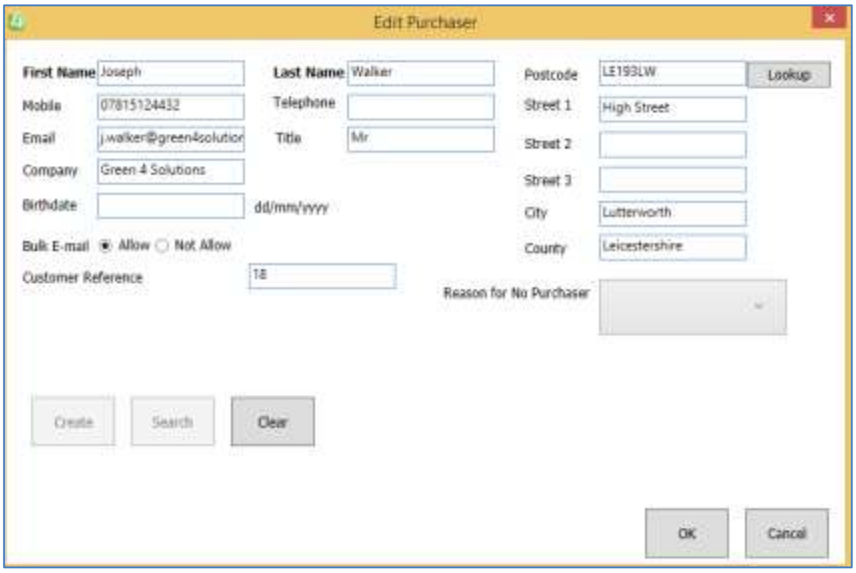
1. Using the Edit Purchaser dialog enter the customer's **First Name** and/or **Last Name** before selecting **Search**.



2. Any customer records matching the search criteria entered will be listed in the Previous Users dialog:



3. Select the correct customer from those listed. The Edit Purchaser dialog will be re-displayed showing the customer's details. The Create and Search buttons will be disabled.



4. Select **OK** to continue with the payment.

Note: If the search criteria entered returns too many customer records, an error message will be displayed stating too many customers have been found. Select **OK** to close the message. Use the Edit Purchaser dialog to modify the search terms entered to reduce the number of records returned, for instance enter both a first name and surname.

Edit an Existing Customer's Details

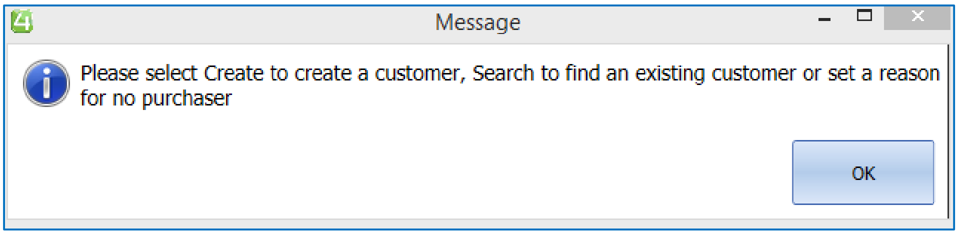
To edit a customer's details using the Edit Purchaser dialog:

1. Search for the customer details as described above.
2. Once the customer details are displayed, make the necessary changes to the information held using the Edit Purchaser dialog.
3. Once the modifications are complete, select **OK**.
4. The Customer Details Have Changed message will be displayed. Select **OK** to save the changes and continue to the Payment Method dialog.

Create a Customer Record

If the customer's details do not exist in the database, it is possible to create a new user record using the Edit Purchaser dialog:

1. Search for the customer details as described above.
2. If the customer's details do not appear in the list of previous users, a message asking to either Create a new customer, Search for a new customer or set a reason for no purchaser will be displayed. Select **OK**.



3. Complete the customer's details, ensuring all mandatory fields (marked by bold text) are completed.
4. Once the details are complete select **Create**.
5. Once the details have been saved, you will be able to continue with the payment.

Complete a Booking without Selecting a Customer

On occasion it is necessary to create a booking without adding a customer's details, for example during busy periods or when the customer refuses to give you the necessary information. To create a booking without adding a customer's details:

1. On the Edit Purchaser dialog use the **Reason for No Purchaser** drop-down list to select the reason why no customer details are being supplied for the booking. Options include **Child**, **Too Busy** and **Refused**.

Note: An additional Reason for No Purchaser option of **Offline** is automatically assigned to bookings made in offline mode. This option cannot be selected using the Edit Purchaser dialog.

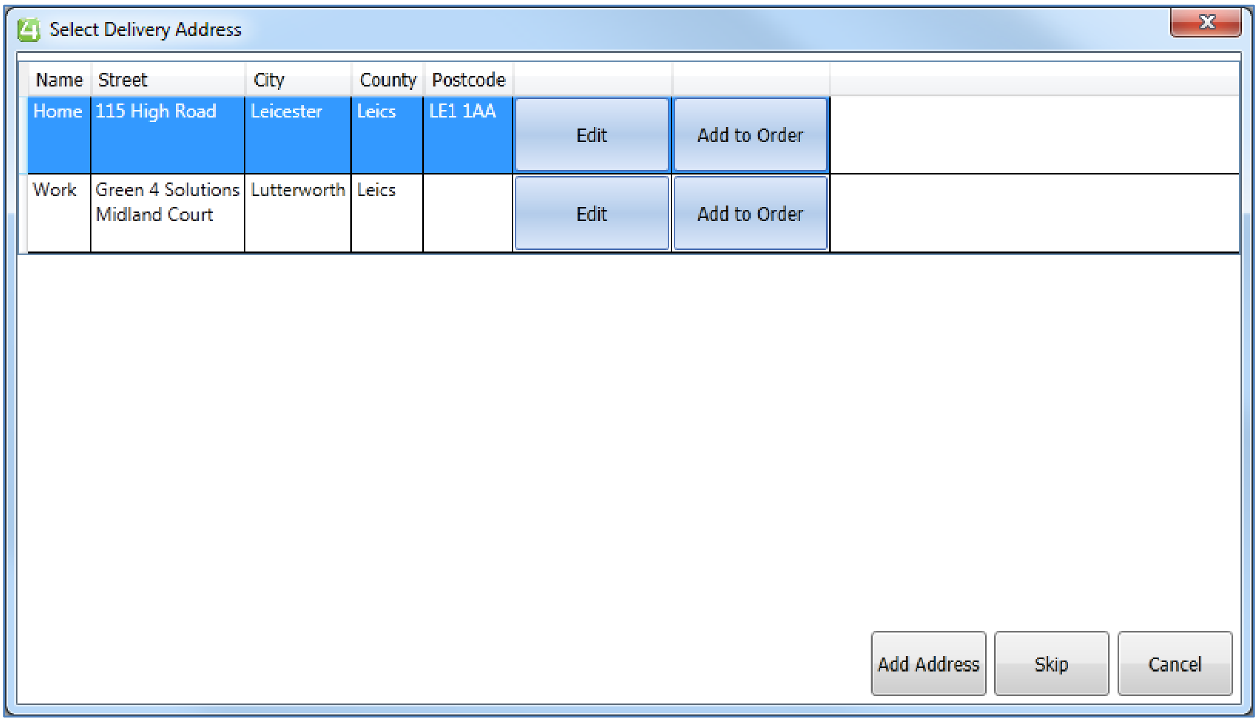
2. Select **OK** to continue with the payment.

Note: Bookings without a purchaser attached can be found using the Booking Reference via the Find Booking tab.

SELECT DELIVERY ADDRESS DIALOG

The Select Delivery Address dialog will be displayed if your system has been configured to allow purchasers to have multiple addresses. Using the Select Delivery Address dialog you can:

- Select the delivery address to use
- Edit a customer's address
- Add a new customer address
- Skip adding an address



Selecting Delivery Address

To select an address to use:

1. Select the **Add to Order** button alongside the appropriate address.
2. The payment process will continue.

Editing an Address

To edit a customer's address:

1. Select the **Edit** button alongside the appropriate address.
2. The Edit Address dialog will be displayed. Complete the required information before selection **OK** to continue.

Note: If post code lookups are enabled for your system you can find the customer's address by entering their post code before selecting **Lookup**. Pick the appropriate address for those listed.

3. The Select Delivery Address dialog will be redisplayed allowing you to select the address to use for the order.

Adding an Address

To add an address to a customer's record:

1. Select the **Add Address**.
2. The Edit Address dialog will be displayed. Complete the required information before selection **OK** to continue.

Note: If post code lookups are enabled for your system you can find the customer's address by entering their post code before selecting **Lookup**. Pick the appropriate address for those listed.

3. The Select Delivery Address dialog will be redisplayed allowing you to select the address to use for the order.

Skip Adding an Address

If you do not wish to add a delivery address, select **Skip** to continue without selecting an address.

ADDITIONAL CHARGES

Additional Charges can be set up on a Sales Channel. These are typically additional fees that are added to ticket sales. If the Fixture or Series on offer needs to include the additional charge, it should along with the associated Bookable Product be flagged accordingly.

This will result in the automatic inclusion of the additional charge for each ticket sold as demonstrated in the example below. This cannot be removed or changed in the shopping basket.

Note: The Channel can have more than one Additional Charge set up against it and if the corresponding product is flagged for Additional Charges, the charge will be added to each product in the shopping cart.

In the example below:

- An Additional Charge called booking fee of £2.50 has been set up for the POS Channel
- The Bookable Product called Event Ticket (Adult Standing) has been flagged for Additional Charges
- The Fixture called Eddie Izzard has been flagged for Additional Charges

If the quantity of tickets purchased is increased to 2, the Additional Charge will be incurred for the second ticket.

PAYMENT METHODS

Cash

To take cash payment for a booking:

1. Select **Cash** on the Payment Method screen.
2. The Cash screen will be displayed:

3. Enter the amount tendered by the customer by either typing the amount directly into the **Amount Tendered** text box, or using the buttons available:
    - **Repeat.** Select to repeat the previous made against the shopping cart. When this option is selected the value of the last payment made will be added to the amount tendered box.
    - **Split.** Select to pay a proportion of the outstanding amount. The Split Payment Calculator dialog will be displayed allowing you to select the proportion the customer is paying (e.g. ½). When an option is selected Payment dialog will be redisplayed showing the amount calculated in the **Amount Tendered** box.
    - **Total.** Select if the customer has tendered the total amount left to pay.
    - **£20.** Select to add £20 to the amount tendered.
    - **£10.** Select to add £10 to the amount tendered.
    - **£5.** Select to add £5 to the amount tendered.
4. Complete the additional information requested:
    - **Send Confirmation Email to Customer.** Select to send a confirmation email to the customer (an email address will be required).
    - **Send Confirmation Email to Operator.** Select to send a confirmation email to the operator.
    - **Print Receipt.** Select to automatically print a receipt.
5. Once the details are complete select **Pay** to continue.
6. If you need to return change to the customer, a dialog advising of the amount to be paid will be displayed. Select **OK** to continue.

Loyalty

Use the Loyalty option if the customer is using loyalty points to pay for their purchases.

1. When the Loyalty payment method is select the Loyalty screen will be displayed:

2. The customer's number of available loyalty points will be displayed. Enter the number of points to redeem in the box provided.
3. Complete the additional information:

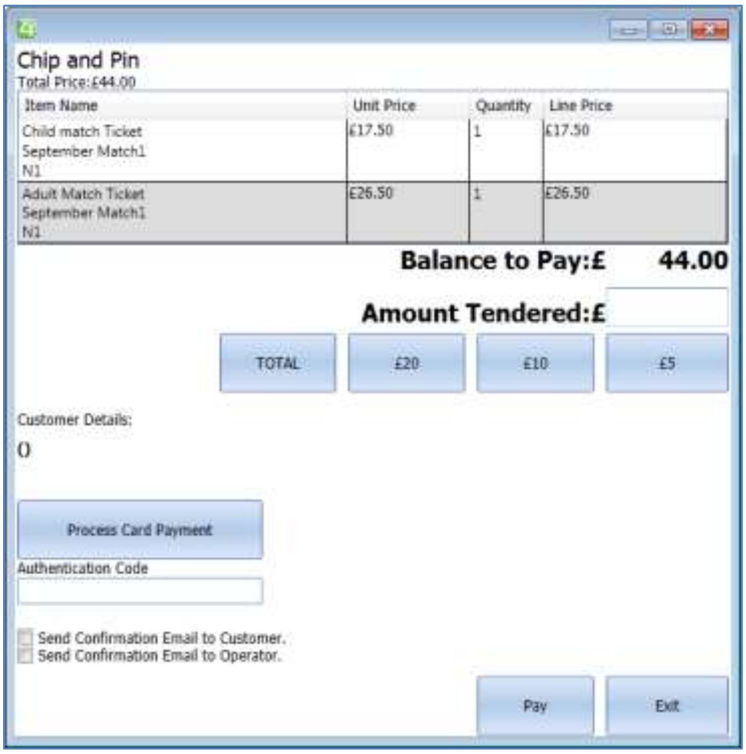
    - **Send Confirmation Email to Customer.** Select to send a confirmation email to the customer (an email address will be required).
    - **Send Confirmation Email to Operator.** Select to send a confirmation email to the operator.
    - **Print Receipt.** Select to automatically print a receipt.

4. Once the details are complete, select **Pay** to continue.

Chip and Pin

If a chip and pin device is connected to the till, payment can be taken using this method. The payment receipt from the device should be put into the till once payment has been taken. To process a chip and pin payment:

1. Select **Chip and Pin** on the Payment Method screen.
2. The Chip and Pin screen will be displayed:

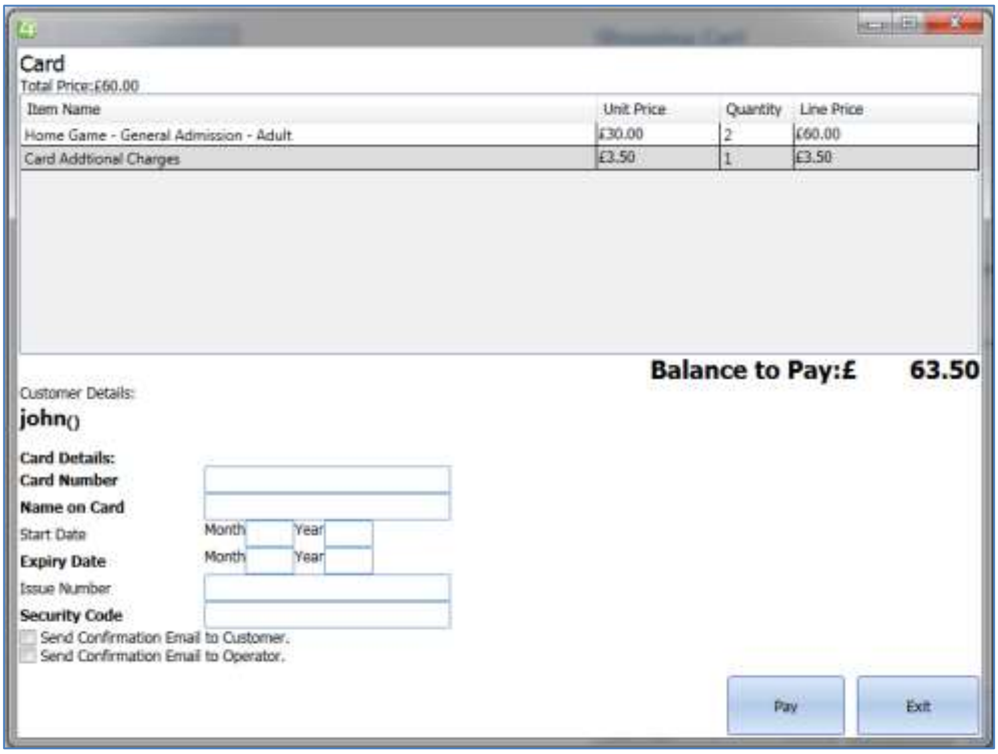


3. Enter the amount tendered by the customer by either typing the amount directly into the **Amount Tendered** text box, or using the buttons available:
    - **Total.** Select if the customer has tendered the total amount left to pay.
    - **£20.** Select to add £20 to the amount tendered.
    - **£10.** Select to add £10 to the amount tendered.
    - **£5.** Select to add £5 to the amount tendered.
4. Select **Process Card Payment** and use the associated Chip and Pin machine to process the payment.
5. Once the payment has been processed, enter the Authentication Code issued by the Chip and Pin machine in the **Authentication Code** field.

Card

The card option should be used to take a credit or debit card payment from a customer when they are not present to enter their chip and pin details. To take a card payment without the customer present:

1. Select **Card** on the Payment Method screen.
2. The Card Payment screen will be displayed:



3. Enter the following details:

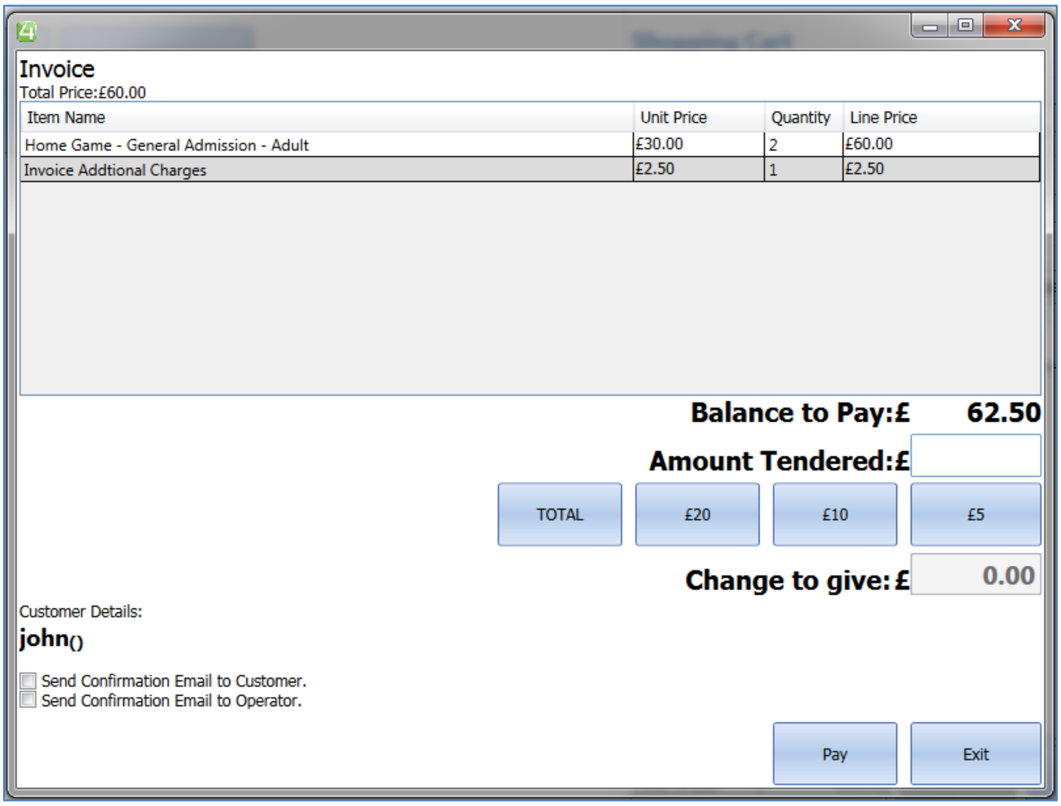
- **Card Number.** Enter the long card number. Mandatory field.
- **Name on Card.** Enter the customer's name as it appears on the card. Mandatory field.
- **Start Date.** If available, enter the start date for the card.
- **Expiry Date.** Enter an end date for the card. Mandatory field.
- **Issue Number.** If available, enter the issue number for the card.
- **Security Code.** Enter the three digit security number taken from the signature strip on the back of the card. Mandatory field.
- **Send Confirmation Email to Customer.** Select to send a confirmation email to the customer (an email address will be required).
- **Send Confirmation Email to Operator.** Select to send a confirmation email to the operator.
- **Print Receipt.** Select to automatically print a receipt.

4. Once the details are complete, select **Pay** to continue.

Invoice

Use the invoice option if the customer is to be invoiced before paying at a later date.

1. When the **Invoice** option is selected, the Invoice screen will be displayed:

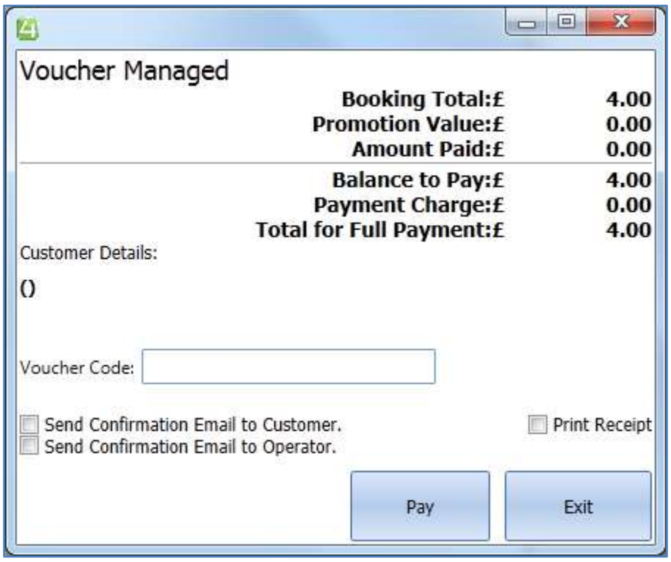


2. Enter the amount tendered by the customer by either typing the amount directly into the **Amount Tendered** text box, or using the buttons available:
    - **Total.** Select if the customer has tendered the total amount left to pay.
    - **£20.** Select to add £20 to the amount tendered.
    - **£10.** Select to add £10 to the amount tendered.
    - **£5.** Select to add £5 to the amount tendered.
3. Complete the additional information:
    - **Send Confirmation Email to Customer.** Select to send a confirmation email to the customer (an email address will be required).
    - **Send Confirmation Email to Operator.** Select to send a confirmation email to the operator.
    - **Print Receipt.** Select to automatically print a receipt.
4. Once the details are complete, select **Pay** to continue.

Voucher

To take voucher payment for a booking:

1. Select **Voucher Managed** on the Payment Method screen.
2. The Voucher Managed screen will be displayed:



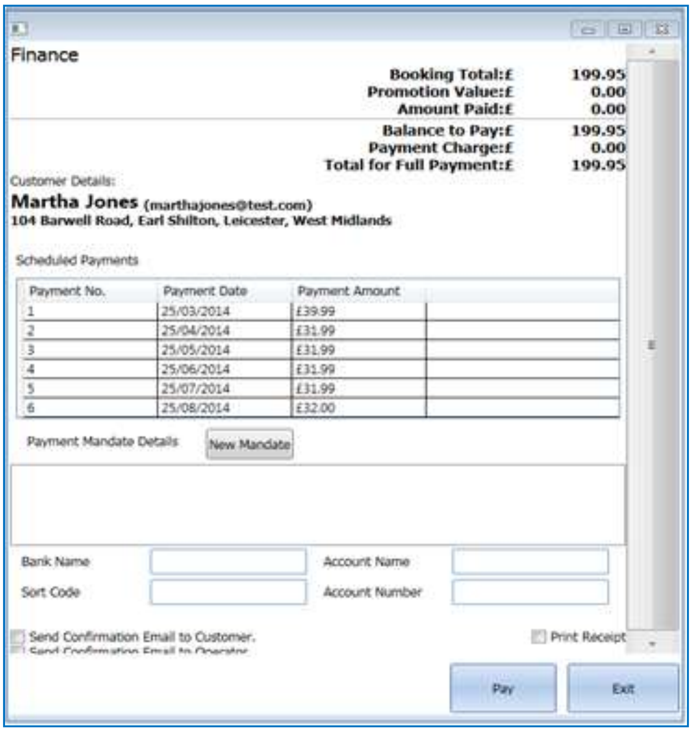
3. Enter the voucher code into the box provided
4. Complete the additional information requested:
    - **Send Confirmation Email to Customer.** Select to send a confirmation email to the customer (an email address will be required).
    - **Send Confirmation Email to Operator.** Select to send a confirmation email to the operator.
    - **Print Receipt.** Select to automatically print a receipt.
5. Once the details are complete select **Pay** to continue.
6. The system will attempt to validate the voucher code entered. If the voucher code is not valid a message will be displayed informing you the voucher is invalid.

DIRECT DEBIT

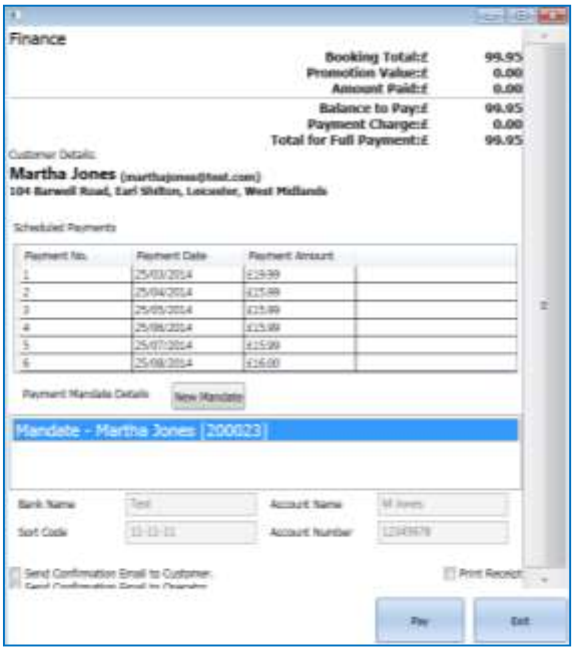
When direct debit has been added as a new payment method available for use via the POS, you will be able to select this option when taking payment from the customer providing ALL items in the shopping cart have been marked as eligible for payment by direct debit.

To process a direct debit payment, carry out the following:

1. Select the **direct debit** payment method on the **Payment Method** dialog.
2. The Direct Debit screen will be displayed:



3. The screen will display the following information:
    - **The amount payable**
    - **The payment schedule**
    - **Details of any previously entered Payment Mandates**
4. If a payment mandate does not exist, complete the following details at the bottom of the dialog:
    a. **Bank Name.**
    b. **Sort Code.**
    c. **Account Name**
    d. **Account Number**
5. If a payment mandate already exists, select the details in the list shown. Once a mandate is selected the account details at the bottom of the screen will become populated:



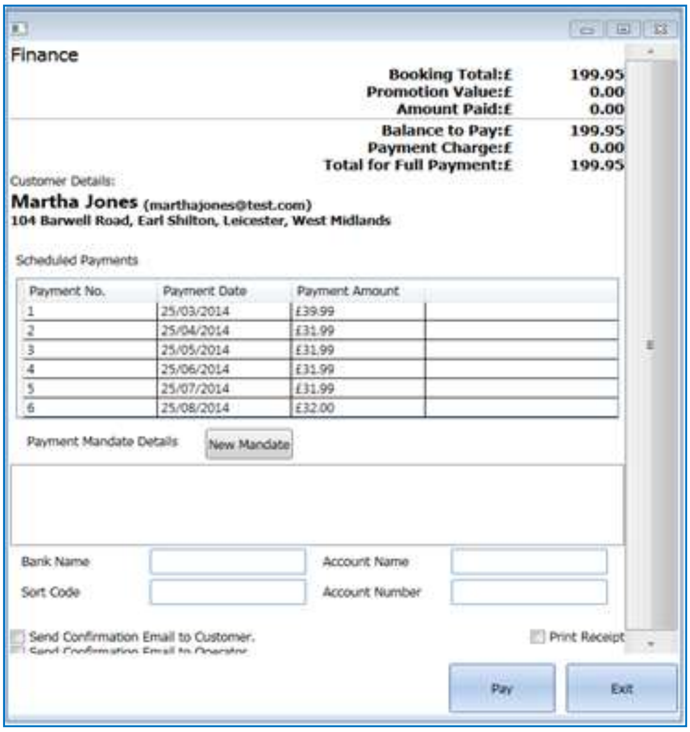
6. When the bank details fields are pre-populated with the details of an existing mandate, click New Mandate to clear the details, allowing the entry of a new mandate.
7. Once the appropriate mandate details have been selected or entered, click Pay to complete the payment.
8. The shopping cart will be redisplayed. The booking will have a status of reserved.

Managing Direct Debit Payments in POS

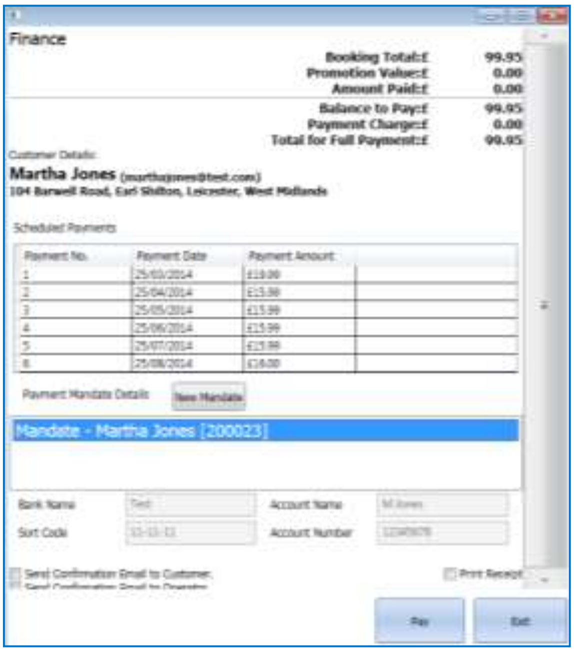
When direct debit has been added as a new payment method available for use via the POS, you will be able to select this option when taking payment from the customer providing ALL items in the shopping cart have been marked as eligible for payment by direct debit.

To process a direct debit payment, carry out the following:

1. Select the **Direct Debit** payment method on the **Payment Method** dialog.
2. The Direct Debit screen will be displayed:



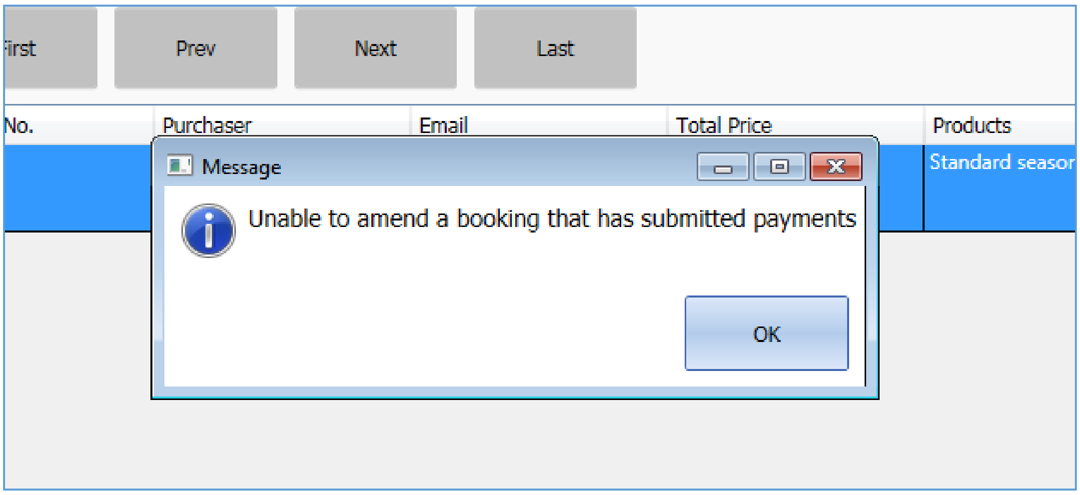
3. The screen will display the following information:
    - The amount payable
    - The payment schedule
    - Details of any previously entered Payment Mandates
4. If a payment mandate does not exist, complete the following details at the bottom of the dialog:
    - Bank Name.
    - Sort Code.
    - Account Name
    - Account Number
5. If a payment mandate already exists, select the details in the list shown. Once a mandate is selected the account details at the bottom of the screen will become populated:



6. When the bank details fields are pre-populated with the details of an existing mandate, click **New Mandate** to clear the details, allowing the entry of a new mandate.
7. Once the appropriate mandate details have been selected or entered, click Pay to complete the payment.
8. The shopping cart will be redisplayed. The booking will have a status of reserved.

AMENDING A DIRECT DEBIT BOOKING

Direct debit bookings cannot be edited whilst a linked booking payment has a status of submitted (i.e. during the period when the payment batch has been submitted to LZ and the responses have not been collected). If you attempt to amend a booking during this period the following error will be displayed:

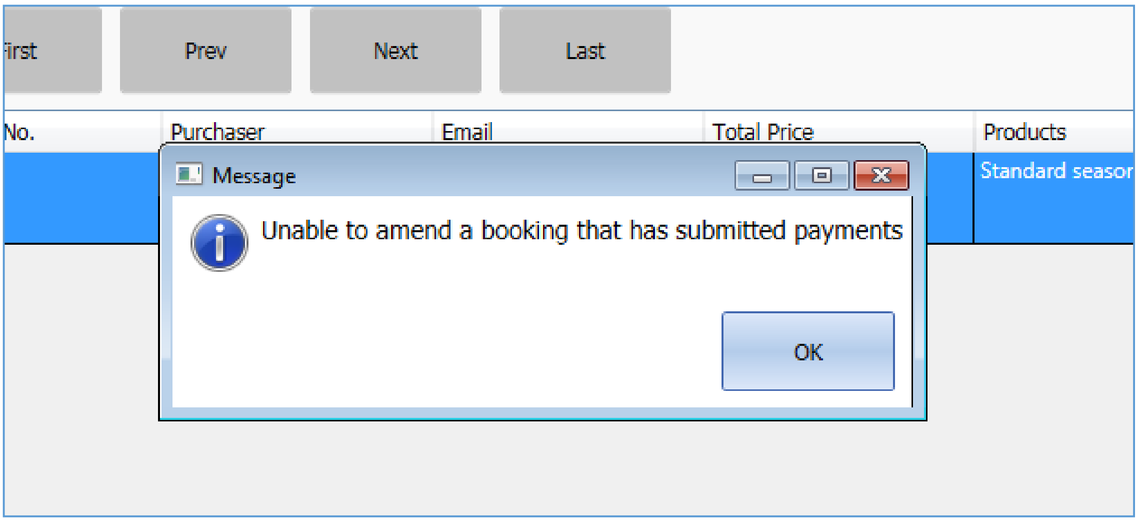


To amend a direct debit booking:

1. Use the **Find Booking** tab to find the booking.
2. Select **Amend Booking** alongside the booking.
3. The booking will be opened in the shopping cart.
4. Edit the shopping cart contents as required.
5. Once the details are complete select **Add Payment**.
6. Process the booking using the Direct Debit payment method (Monthly Payments).
7. Any payments that have been previously made against the initial booking will be carried forward to the new booking.
8. The future scheduled payments will be modified to reflect the price of the newly selected products.

Cancelling a Direct Debit Booking

Direct debit bookings cannot be cancelled whilst a linked booking payment has a status of submitted (i.e. during the period when the payment batch has been submitted to LZ and the responses have not been collected). If you attempt to cancel a booking during this period the following error will be displayed:



To cancel a direct debit booking:

1. Use the **Find Booking** tab to find the booking.
2. Select **Amend Booking** alongside the booking.
3. The booking will be opened in the shopping cart.
4. Remove all of the products from the shopping cart.
5. If a refund needs to be made, select **Add Payment**. Select the payment method to be used. Enter the amount to be refunded before clicking **OK**.
6. If the full amount paid by the customer up to the point of cancellation is not going to be refunded to the customer, it is necessary to assign the remaining amount against the Direct Debit Refund payment method (select **Add Payment** > **Direct Debit Refund**)

First Payment & Direct Debit Mandate - The POS

This functionality allows a recurring product (i.e. a membership) to be purchased and fully paid for by a customer. As part of this initial transaction a Direct Debit Mandate is also created allowing future direct debit payments to be taken. This means that upon renewal of the product in the future, a Direct Debit Mandate is instantly available to use, and the resultant renewal of the product can be taken by a schedule of Direct Debit payments.

For example, a customer will be able to purchase a Membership for 12 months with a full first payment. When the second year is reached and renewal occurs, a Direct Debit mandate is already in place, allowing regular direct debit payments to be made.

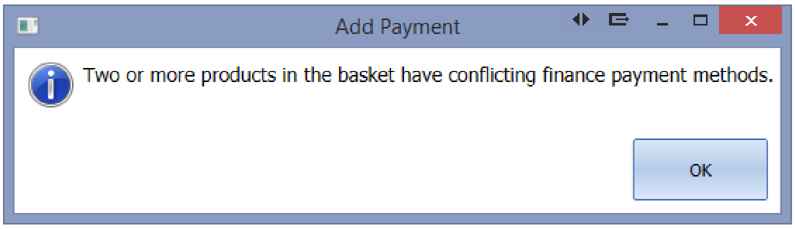
1. In the POS select the Product that the Direct Debit Recurring and First Payment functionality has been set up for and proceed to the checkout in the normal way.
2. In the **Edit Purchaser** screen enter the customer's details before selecting **OK.** If Beneficiaries has been set to **Required** in CRM, complete the **Edit Beneficiaries** form.
3. Before being able to select the **Add Payment** button a Direct Debit Mandate Collection screen will appear. The initial payment and payment by any other methods cannot be selected until the Direct Debit Mandate Collection screen has been completed. The scheduled section of the screen will display the Payment Date of the Direct Debit and the Payment Amount.

4. Either create a **New Mandate** by selecting the button and enter the **Bank Name**, **Account Name**, **Sort Code** and **Account Number** of the customer. Alternatively, if an existing Mandate exists select it. Upon completion, select **Pay.**

5. It will now be possible to take the initial payment. The basket area will display the cost of the first payment that has to be paid. To complete the payment select **Add Payment** before choosing the method of payment where it can be taken in the normal manner.

Note. If the **Close** button is pressed in the basket before the initial payment is taken the usual **Close Booking** window will be displayed asking if you wish to abandon the booking.

If the system is set up with two or more Finance Payment Methods and the basket contains products that use more than one of these then the following message will be displayed when attempting to make a payment.



3.10. USING TABS

If tabs have been set up for use on your terminal, you can add the value of the booking cart to the customer's tab. To use tabs carry out the following:

ADDING ITEMS TO A NEW TAB IN THE POS

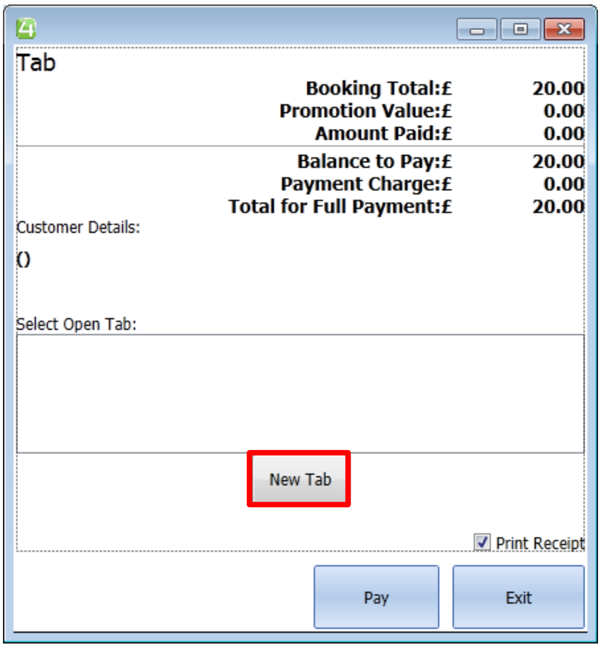
To create a new Tab for a customer in the POS when they initially order, carry out the following:

1. Add the items to the shopping cart as normal. Once all items have been added to the cart, select **Add Payment**.

2. From the Payment Method dialog select **Tab.**

Note: Depending upon your configuration of the F&B system you may be asked to provide additional information, for example purchaser's name before the Payment Method dialog is displayed.

3. If no existing tabs are open, a warning will be displayed. Select **OK** to continue.
4. The Tab screen will be displayed:



5. Select **New Tab** (highlighted above).
6. The **Confirm Tab Payment** screen will be displayed:

7. Enter a **name** for the Tab, for example table number or customer name, before selecting **OK**.

If your F&B/Kiosk Channel has been set up to use Pin Codes with Tabs, when you create a new Tab you will be requested to enter the following additional details:

- **Tab Pin.** Enter the pin number to be used for the Tab.
- **Confirm Pin.** Re-enter the pin number.

The details of the pin should be given to the customer, who will need to give you the pin number each time they attempt to add goods to their Tab.

---

8. The Tab dialog will be redisplayed. Select **Exit** to continue.

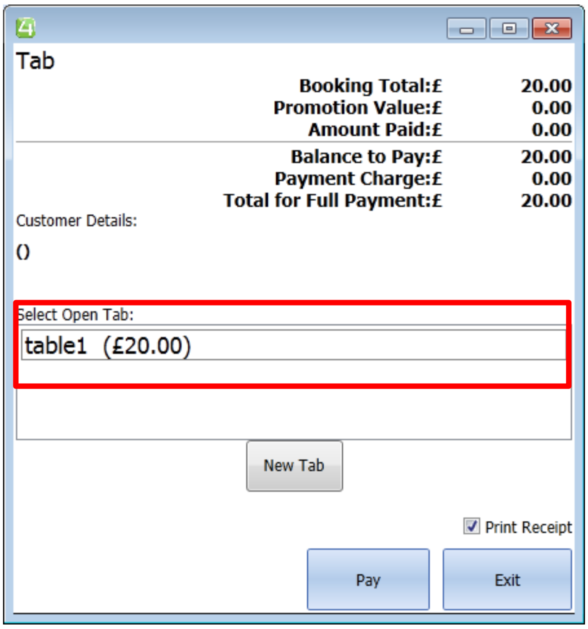
ADDING ITEMS TO AN EXISTING TAB IN THE POS

1. Add the items to the shopping cart as normal. Once all items have been added to the cart, select **Add Payment**.
2. From the Payment Method dialog select **Tab**.

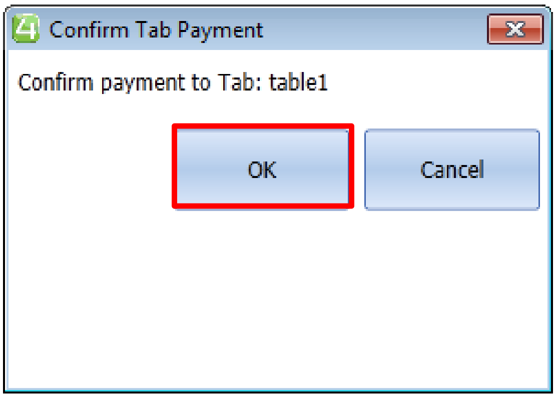
Alternatively the Pay to Tab option below the shopping cart can be used to open the Tab window directly.

---

3. The Tab screen will be displayed:



4. The details of any existing tabs will be listed (highlighted above).
5. Select the tab you wish to add the current order to.
6. The Confirm Tab payment dialog will be displayed. Select **OK** to continue.



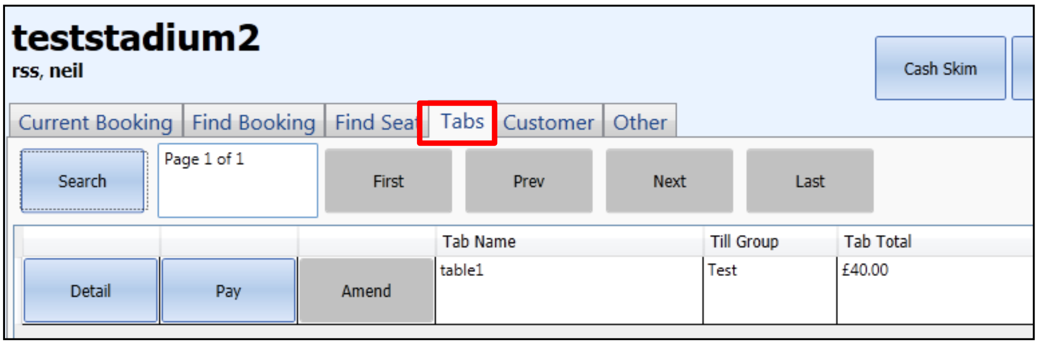
If your F&B/Kiosk Channel has been set up to use pin codes with Tabs, when you attempt to add an item to an existing Tab you will be requested to enter the **Tab Pin**. The details of the pin will be given to you by the customer. You will only be able to add items to an existing Tab if the correct pin is given.

7. The Tab dialog will be redisplayed. Select **Exit** to continue.

SETTLING A TAB IN THE POS

When the customer is ready to settle the Tab and pay up, carry out the following within the POS:

1. Select the **Tabs** heading as shown below.

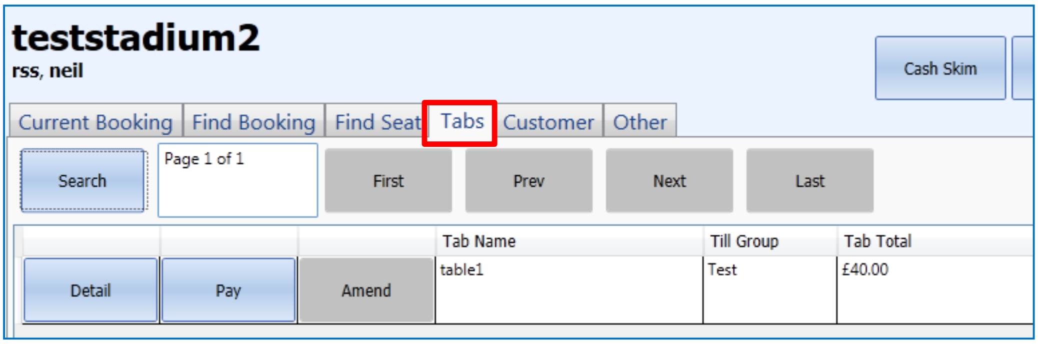


2. A list of the current open Tabs will be displayed.
3. Select **Pay** alongside the Tab that you wish to settle. If you wish to review the details of the Tab first, select **Detail** to open the Tab details. From the Details dialog you can select **Pay** to continue.
4. The shopping cart will be opened displaying details of all the items added to the Tab. Select **Add Payment** to continue.
5. The Payment Method dialog will be displayed. Select the appropriate option and process the customer's payment.

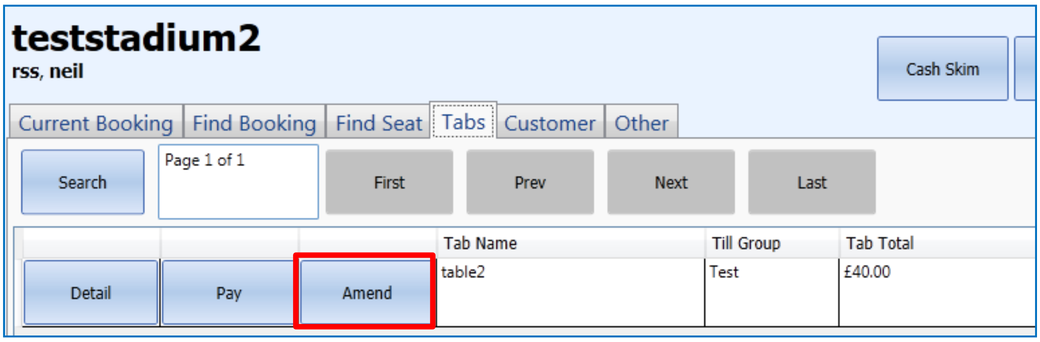
AMENDING A TAB IN THE POS

If the customer disputes the items included on the Tab or the items are incorrect, the details can be amended as follows:

1. Select the **Tabs** heading as shown below:



2. A list of the current open Tabs will be displayed.
3. Select **Pay** alongside the tab that you wish to settle.
4. The Tab details will be opened in the shopping cart. If the details are incorrect, re-open the Tabs view.

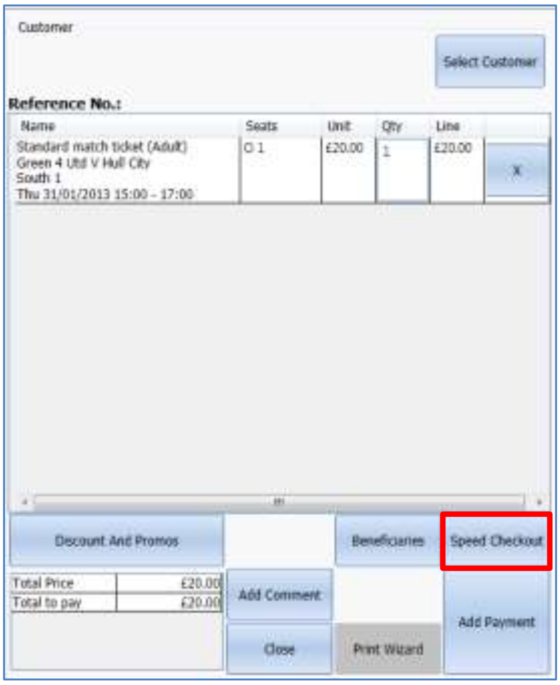


5. Alongside the Tab you have selected to pay, the Amend option will now be available. Select **Amend** to continue.
6. The shopping cart will be refreshed to show the Tab details in the edit mode. Make the necessary changes to the Tab before selecting **Add Payment** to continue.
7. The Payment Method dialog will be displayed. Select the appropriate option and process the customer's payment.

3.11. SPEED CHECKOUT

On occasion, for example on match day you may not wish to collect customer details for each purchase made. In this instance the Speed Checkout option can be enabled by your system administrator. To use the Speed Checkout options:

1. Once the product has been added to the shopping cart, select the **Speed Checkout** option (highlighted below):

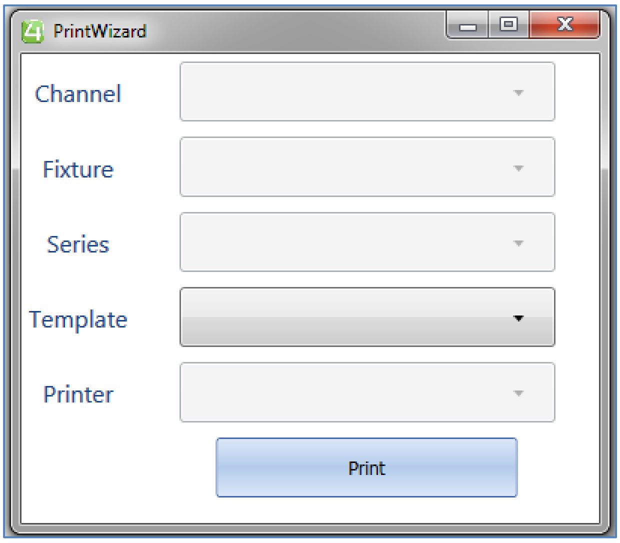


2. The Payment Method dialog will be displayed. Select the appropriate option and process the payment in the usual manner.

3.12. PRINTING TICKETS

Once payment has been made, it is necessary to print the tickets for the customer:

1. Select **Print Wizard**.
2. The Print Wizard will be displayed:



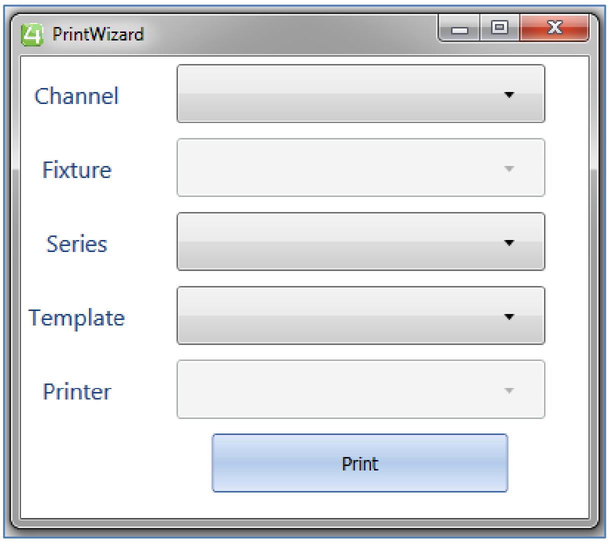
3. Complete the following details:
   - **Template.** Use the drop-down list to select the print template to be used, for example select an appropriate template for printing tickets or season passes.
   - **Printer.** Use the drop-down list to select the printer that is to be used. Only printers that can be used with the selected template will be displayed.
4. Once the tickets have printed the shopping cart will be re-displayed. Select **Close** to close the booking.

Note: If you are making a booking for an away match, it will be necessary to print a receipt for the customer as the tickets will be supplied by the away club.

3.13. BATCH PRINTING

On occasion it may be necessary to print a batch of tickets, for instance when printing tickets to fulfil bookings made online. To print a batch of tickets:

1. Select the **Other** tab heading.
2. Select **Print**.
3. The Print Wizard will be displayed:



4. Use the drop-down to select the **Channel**, for example select **Web**.
5. Next select either the **Fixture** (to print all of the tickets sold for a fixture via the selected channel) or **Series** (to print season tickets sold via the selected channel). Only the fixture and series tickets available via the selected channel will be listed.
6. Select the template to be used, for example ticket with address.
7. Select the printer to be used. Only printers suitable for use with the selected template will be available.
8. Click **Print** to complete the print job.

3.14. SHOPPING CART – ADDITIONAL FUNCTIONALITY

DELETING ITEMS FROM THE SHOPPING CART

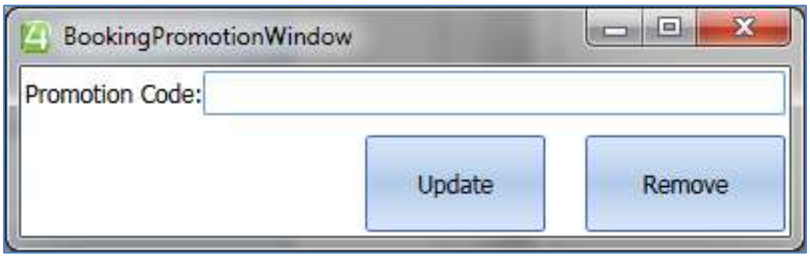
To delete an item from the shopping cart:

1. Select the **X** button alongside the item that you wish to remove.
2. The item will be removed from the shopping cart without further warning.

ADDING PROMOTIONS

Customers may present promotional codes that they have received through emails or advertisements. To add these to the shopping cart carry out the following:

1. Select **Promotion** at the bottom of the shopping cart.
2. The Booking Promotion Window will be displayed:



3. Enter the **Promotional Code** presented by the customer.
4. Select **Update** to add the promotion to the shopping cart. The cart will be updated immediately.

To remove a promotional code:

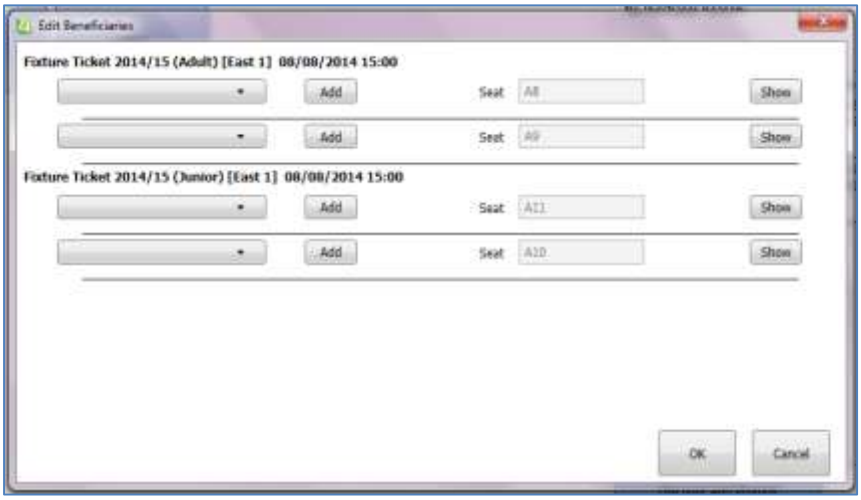
1. Select **Promotion** at the bottom of the shopping cart.
2. The Booking Promotion Window will be displayed. The promotional code previously added to the cart will be displayed.
3. Select **Remove** to continue. The shopping cart will be updated immediately.

Note: Only one promotional code can be added to a shopping cart.

ADDING BENEFICIARIES

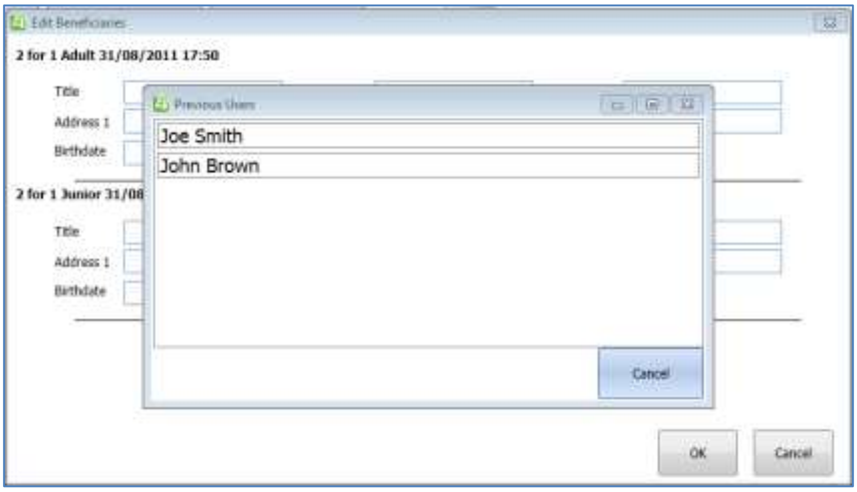
For some products the names of the beneficiaries may be required or requested. As beneficiaries are entered into the database, this is a good method of capturing more information about the customers using your centre. To add a beneficiary to a booking:

1. If beneficiaries are required or requested for a product included in the shopping cart, the Edit Beneficiaries dialog will be displayed when you select **Beneficiaries** in the Shopping Cart, or when you select **Add Payment** for a booking.



2. Enter the requested information before selecting **OK**. All fields marked in bold text are mandatory and must be completed before you can continue processing the booking.

3. If the customer associated with the booking has previously supplied beneficiary details, the Previous Users dialog will be displayed if these details match those entered into the Edit Beneficiaries dialog. For example, if the current customer has previously entered the beneficiary name Joe Smith, when you type J into the First Name field, the previous users dialog will be displayed listing Joe Smith (and any other beneficiaries linked to the customer and starting with J). Click over the appropriate name to use a beneficiary from the Previous Users dialog.



4. MANAGING BOOKINGS

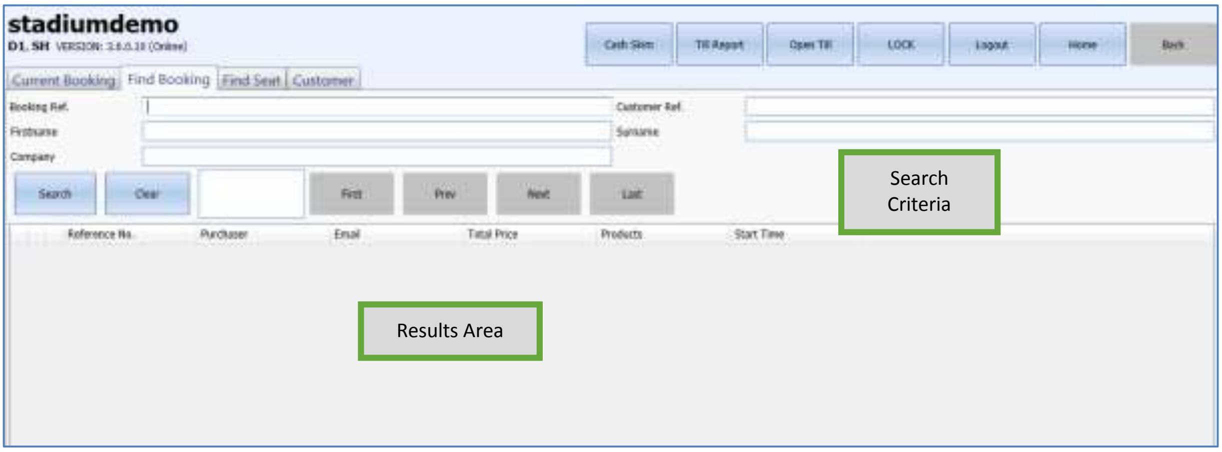
Once a booking has been made the details can be accessed via the Find Booking Screen and a number of related tasks can be carried out:

- Finding a Booking
- Amending a Booking
- Viewing a Booking's Details
- Finding a Booking Using the Seat or Ticket Number

4.1. FINDING A BOOKING

To find a booking carry out the following:

1. Select the **Find Booking** tab heading.
2. The Find Booking Screen will be displayed:



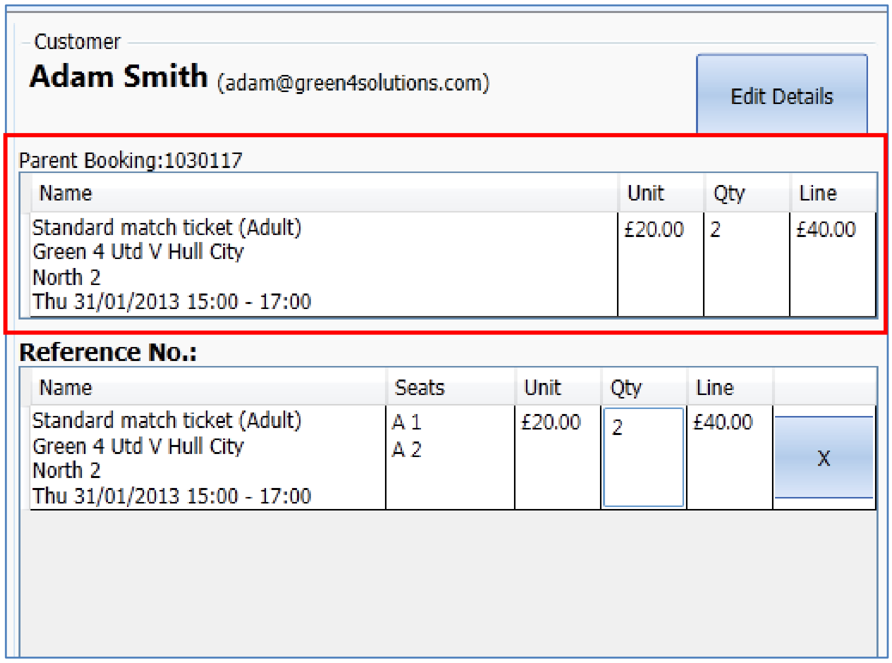
3. Enter one or more of the following pieces of information:
   - **Booking Ref.** Enter the booking reference of the booking you are interested in.
   - **Customer Ref.** Enter the customer reference of the customer assigned to the booking.
   - **First Name.** Enter the first name of the customer assigned to the booking.
   - **Company.** Enter the company of the customer assigned to the booking.
   - **Surname.** Enter the surname of the customer assigned to the booking.
4. Select **Search** to continue.
5. Any bookings matching the details entered will be listed in the Results area (see above). To edit the details of a booking select **Amend Booking** (see Amending a Booking for details), or to review the details of a booking select **Detail** (see Viewing a Booking's Details for details).

4.2. AMENDING A BOOKING

To amend a booking listed on the Find Booking:

1. Select **Amend Booking** alongside the appropriate booking.

2. The shopping cart will be displayed listing the details of the existing booking:



3. The details of the original (or parent) booking, including booking number will be shown at the top of the cart (highlighted above).

4. Amend the shopping cart as follows:

   - **Add Product.** To add a product to the shopping cart, select the product from the Current Booking screen on the left hand side of the window. See Selecting the Ticket Option for more details on adding products to the shopping cart.

   - **Delete Product.** To delete a product from the booking, select the **X** button alongside the appropriate item. The product will be removed from the booking immediately.

5. Before closing ensure payment is collected for the additional purchases and any extra tickets have been printed. For more details see Taking Payment and Printing Tickets.

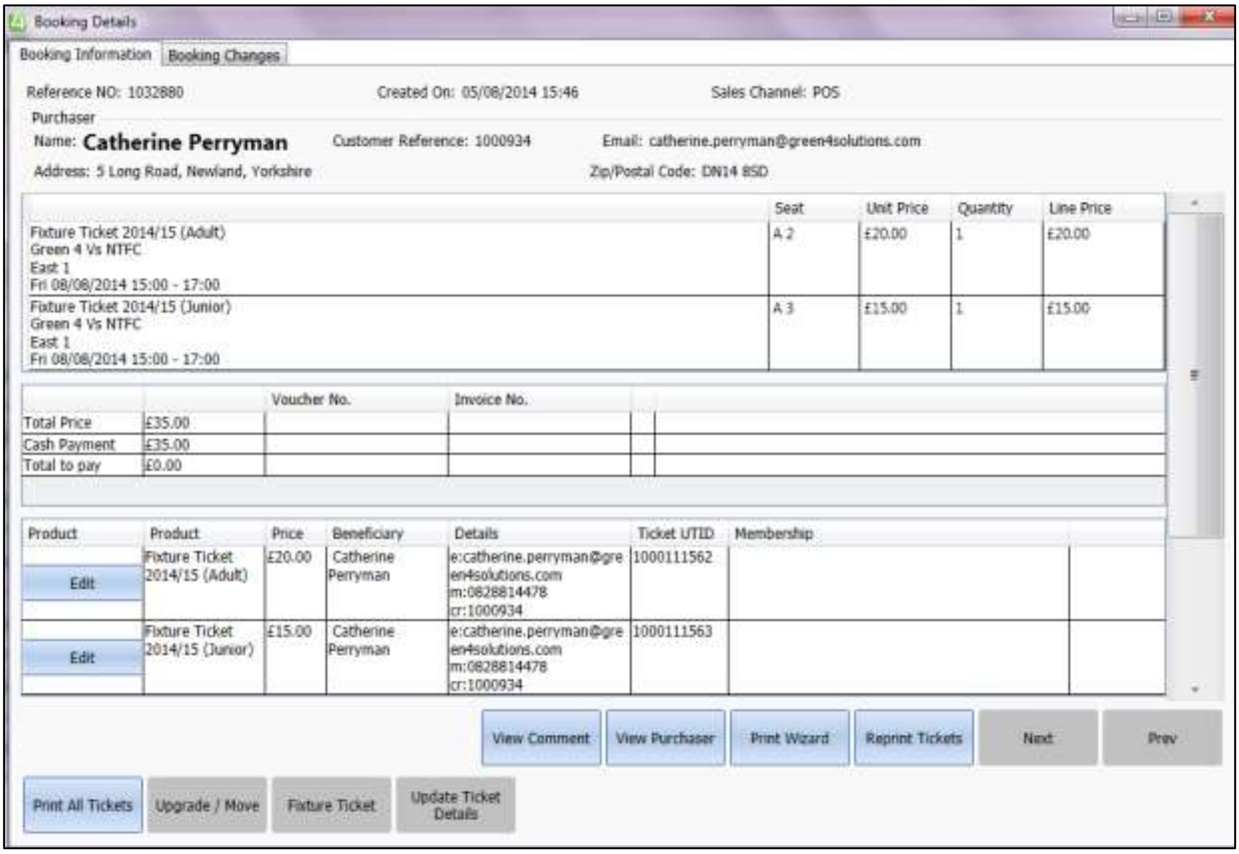
Note: Once the amended booking is saved (after payment has been received) the booking will have a new reference number which will be in the format: ***<parentreferencenumber>-1***. You will no longer be able to make modifications to the parent booking, as this will be set to inactive and therefore all subsequent changes will have to be made to the amended booking.

4.3. VIEWING A BOOKING'S DETAILS

To view the details of a booking listed on the Find Booking screen:

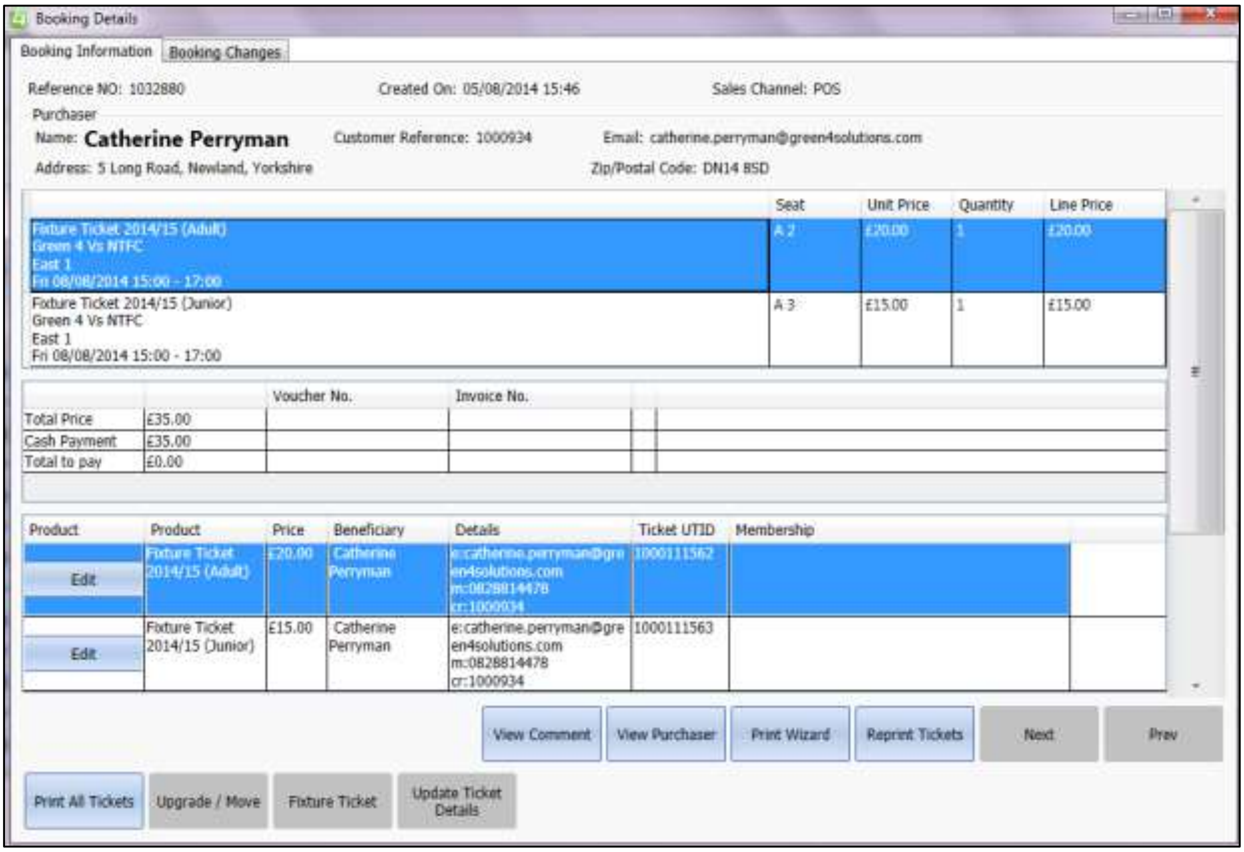
1. Select **Detail** alongside the appropriate booking.

2. The Booking Details dialog will be displayed:



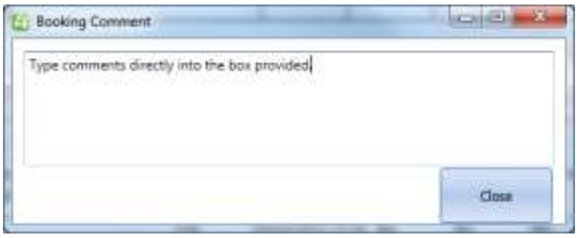
3. If related bookings exist, for example parent or child bookings, the **Next** and **Previous** buttons can be used to move to the related bookings.

4. If the booking consists of more than one product, selecting the product variant will highlight the beneficiary assigned to this ticket. The scroll bar on the right can be used to scroll down to the ticket information section relating to this product variant and will also be highlighted.



5. Other options available include:

- **Print Voucher.** If the booking includes vouchers, use this option to print the vouchers purchased.
- **Cancel Voucher.** If the booking includes vouchers, use this option to cancel the vouchers purchased.
- **View Comment.** Select to view the comments linked to the booking. The Booking Comment will be displayed. Additional comments can be added directly into the comments box. Select **Close** to return to the Booking Details dialog.



- **View Purchaser.** Select to view the purchaser's details. The Customer Details dialog will be displayed. For more information see Customer Details Dialog.
- **Print Wizard.** Select to open the Print Wizard allowing you to print tickets linked to the booking.

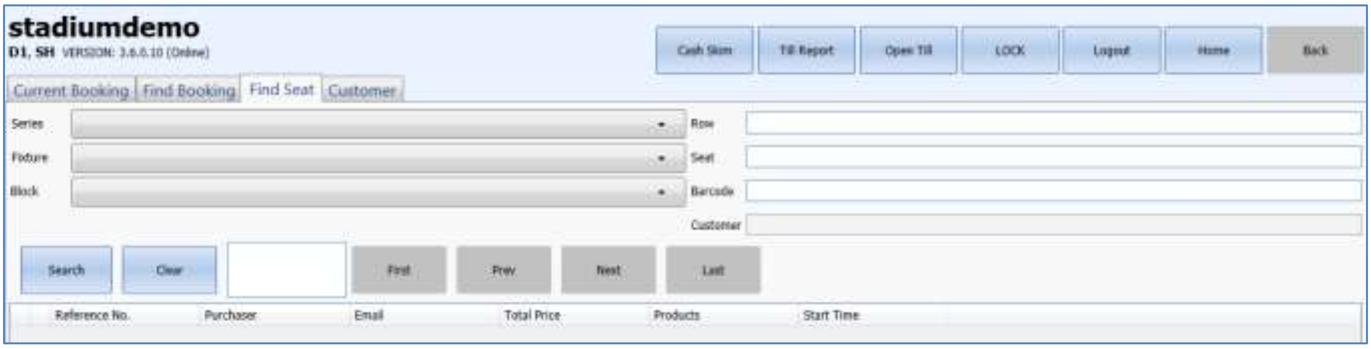
- **Upgrade/Move.** Select to upgrade or more a season ticket for a selected fixture. This option is only available if the booking is for a season ticket and the upgrade/move functionality has been enabled for your system. See Season Tickets for more details.

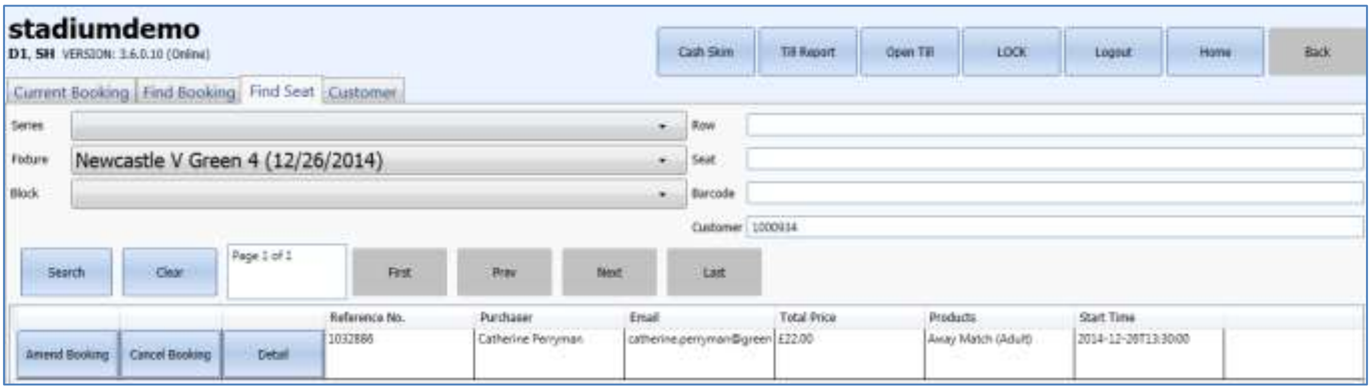
- **Fixture Ticket.** Select to print a fixture ticket that has been purchased as part of a series. For example, if the customer has forgotten their season ticket, you can print a match day ticket for the current fixture to enable them to enter the stadium. For more details see Season Tickets.

4.4. FINDING A BOOKING USING THE SEAT OR TICKET NUMBER

To find a booking carry out the following:

1. Select the **Find Seat** tab heading.
2. The Find Seat Screen will be displayed:





3. Enter one or more of the following pieces of information:

    - **Series.** Use the drop-down list to select the series you are interested in. Only use this option if you are searching for a series booking.

    - **Fixture.** Use the drop-down list to select the fixture you are interested in. Only use this option if you are searching for a fixture booking.

    - **Block.** Use the drop-down list to select the block the booking relates to.

    - **Row.** Enter the row number the booking relates to.

    - **Seat.** Enter the seat number the booking relates to.

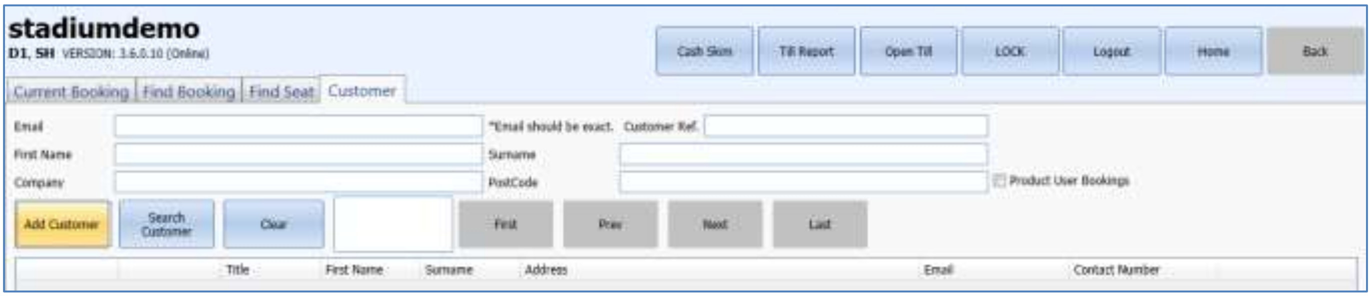
- **Barcode.** Enter the ticket barcode.
- **Customer.** This field will be activated once a Series or Fixture is selected and the customer reference no. can be used to search for the booking.

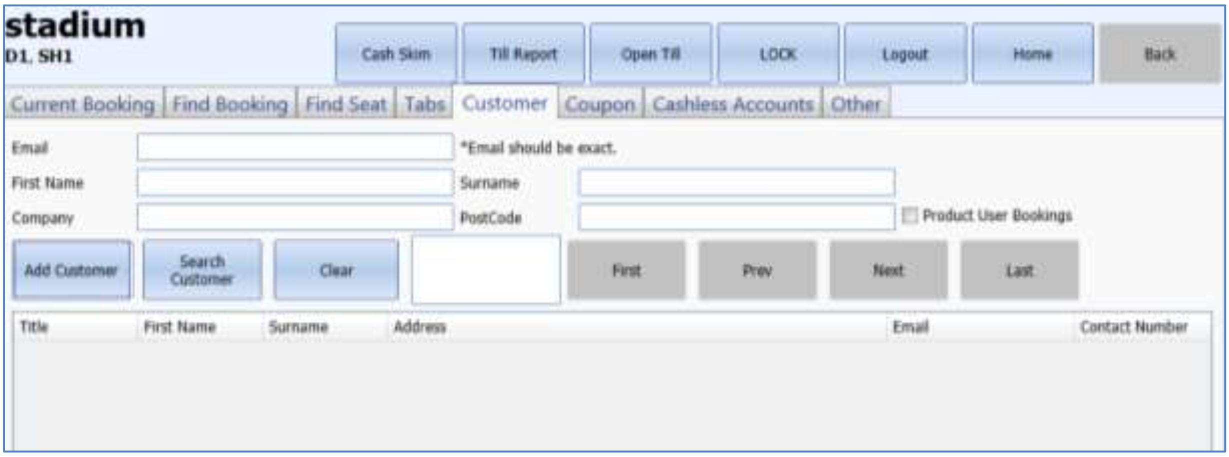
4. Select **Search** to continue.
5. Any bookings matching the details entered will be listed in the Results area. To edit the details of a booking select **Amend Booking** (see Amending a Booking for details), or to review the details of a booking select **Detail** (see Viewing a Booking's Details for details).

4.5. SEARCHING FOR A CUSTOMER

To search for a customer:

1. Select the **Customer** tab heading.
2. The Find Customer Screen will be displayed:





3. Enter one or more of the following pieces of information:

- **Email.** Enter the customer's email address. The address entered must exactly match the entry held in the system.
- **Customer Ref.** Enter the customer's unique customer reference number.
- **First Name.** Enter the customer's first name. It is not necessary to enter the customer's full name, for example entering Ste will find Steve, Steven, Stephen, etc.
- **Company.** Enter the customer's company (if a corporate customer). It is not necessary to enter the full company name.

- **Surname.** Enter the customer's surname. It is not necessary to enter the customer's full name, for example entering Rob will find Robinson, Roberts, etc.

- **Post Code.** Enter the customer's postcode. It is not necessary to enter the customer's full post code.

4. If you wish to include customers that have been added as beneficiaries select the **Product User Bookings** check box.

5. Once you have entered one or more search terms, select **Search Customer**.

6. Any records found to match the search term entered will be listed below the search terms:

7. Any bookings matching the details entered will be listed in the Results area. To add a customer to the current booking, select **Add to Order** alongside their details. To view details of the customer's previous bookings select **Show Bookings**.

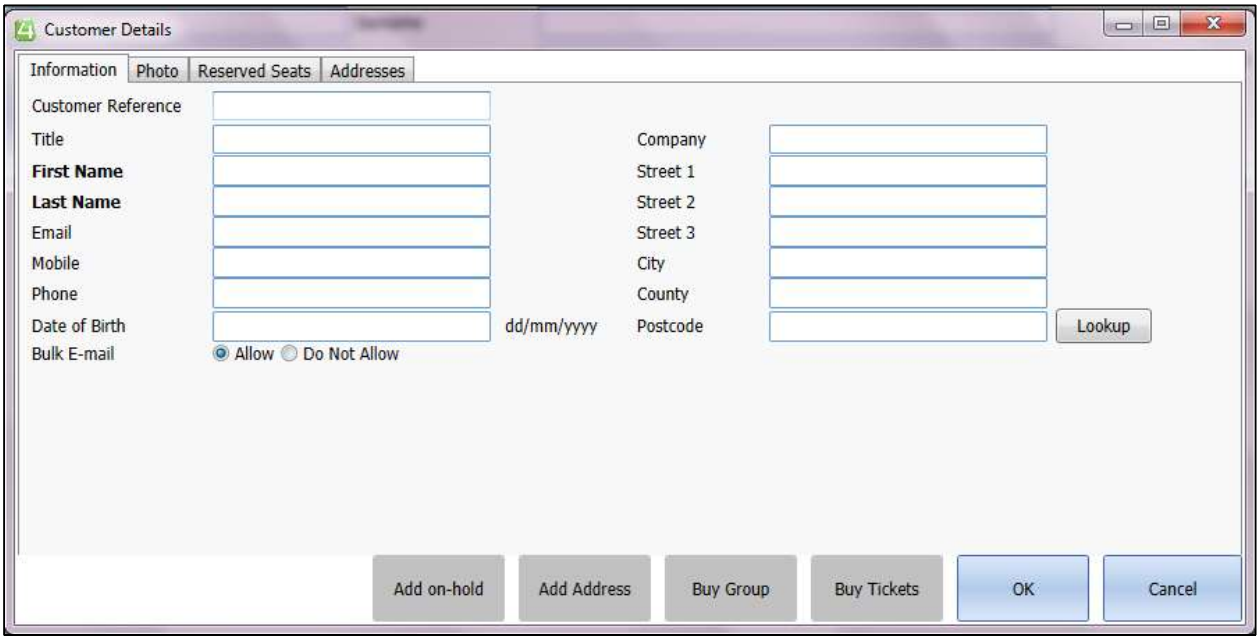
CREATING A NEW CUSTOMER

To create a new customer using the Customer screen:

1. Carry out a customer search (as described above) to ensure the customer's details have not been previously added to the system.

2. To add new customer details, select **Add Customer**.

3. The Customer Details screen will be displayed:



4. Enter the requested details. The Customer Reference field is read only and will be auto populated on submission of the form.

Note: If you have postcode lookup enabled for Green 4 Ticketing you can enter the individual's address by entering the customer's postcode before selecting **Lookup**. Pick the appropriate address from the list of addresses returned.

---

5. Select **OK** to confirm the details.

6. The Customer screen will be re-opened displaying the newly added customer.

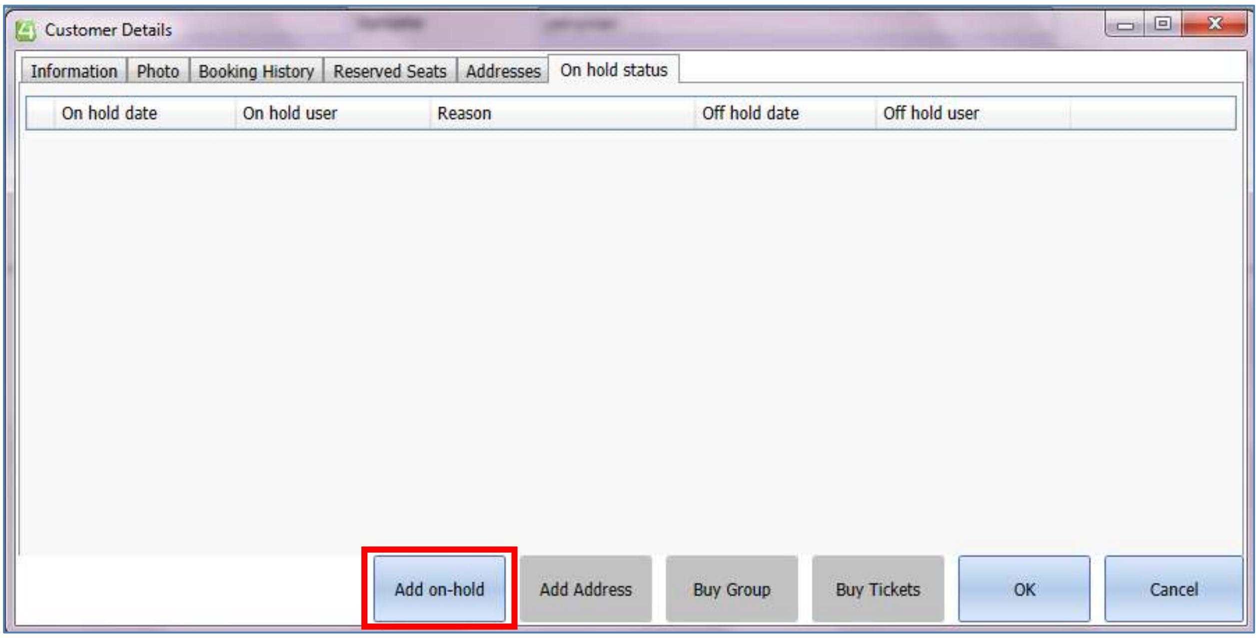
PUTTING A CUSTOMER ON HOLD

To put a customer on hold:

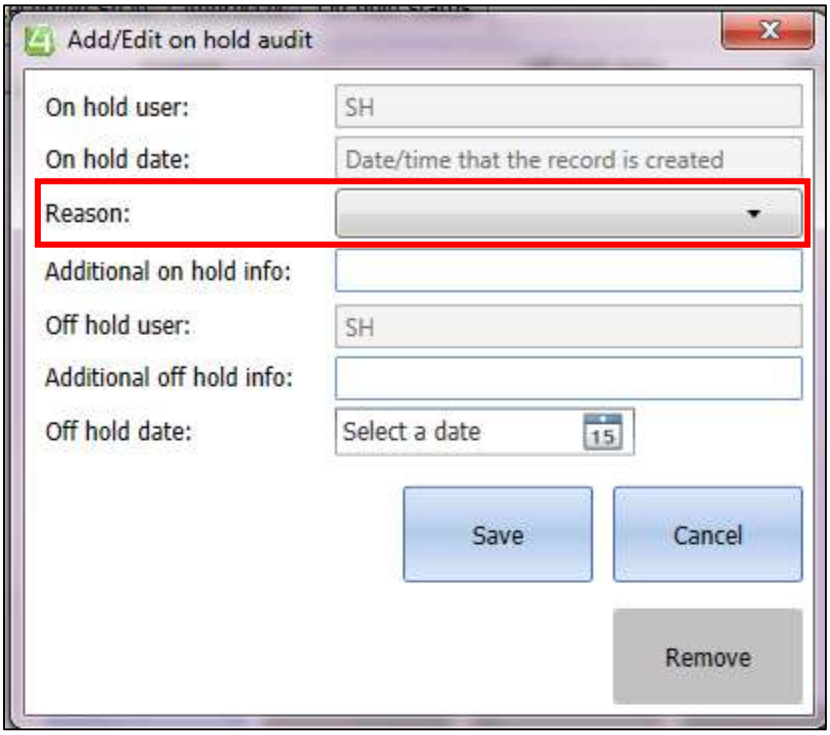
1. Carry out a customer search (as described above).

2. Select the **On Hold Status** tab.

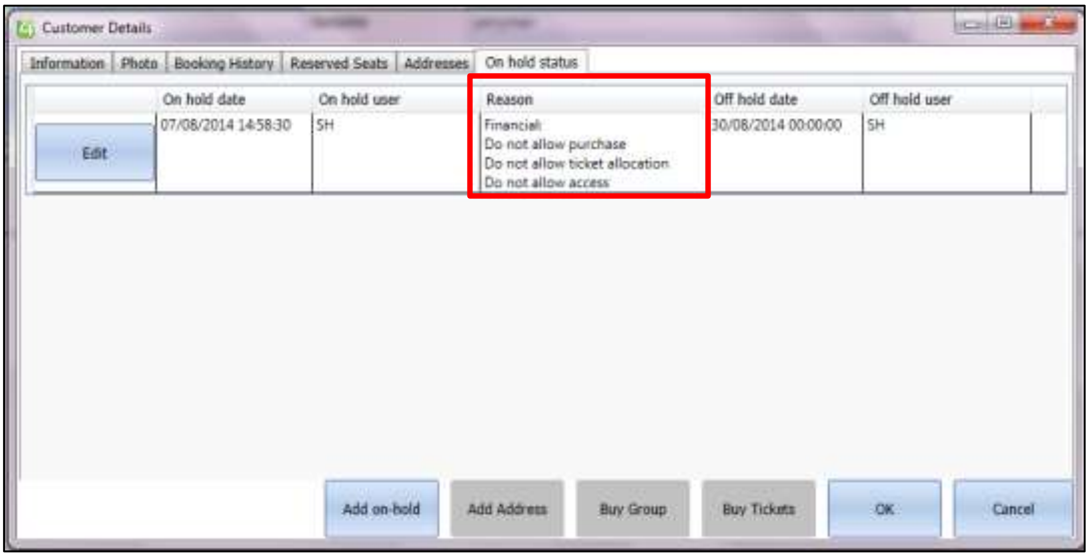
3. The On hold status screen will be displayed:



4. Select **Add on-hold.**



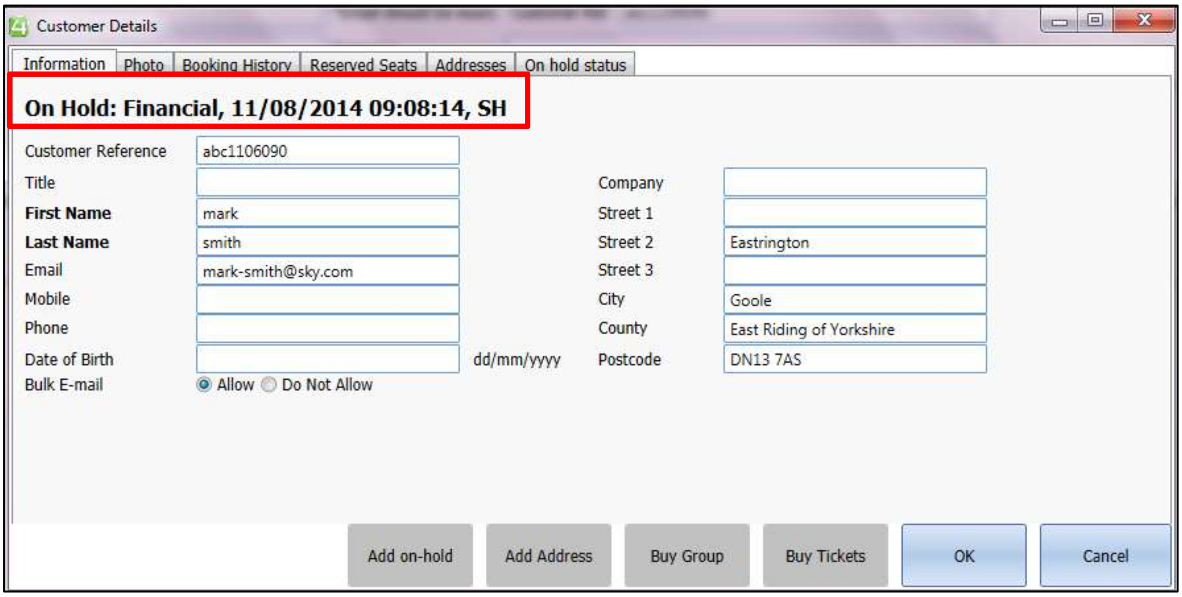
5. Select a **Reason** from the drop down list. Reason codes are set up in CRM.
6. Add any additional information in the **Additional on hold** info field.
7. An Off hold date can be selected in the future, else this field can be left blank and an off hold date entered at a later stage.
8. Select **Save.**
9. An On Hold audit record will be created against the contact listing the reason why the contact has been put on hold and the consequence of the contact being on hold.



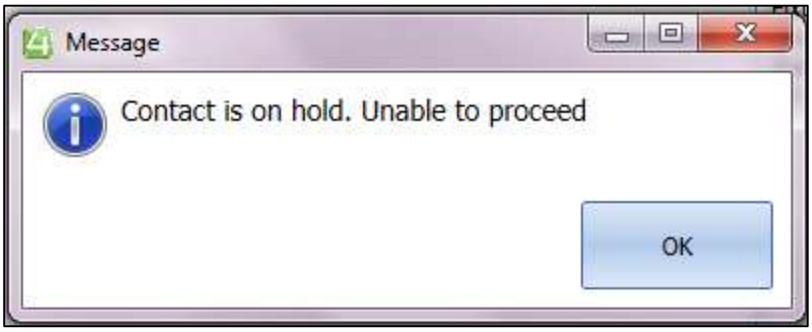
10. If a contact has been put on hold, this status will be shown on the Customer Detail screen

11. Depending on the on hold reason set up, the customer may be restricted from purchasing a ticket. The set up of the reason code can consist of one or a combination of the following settings:

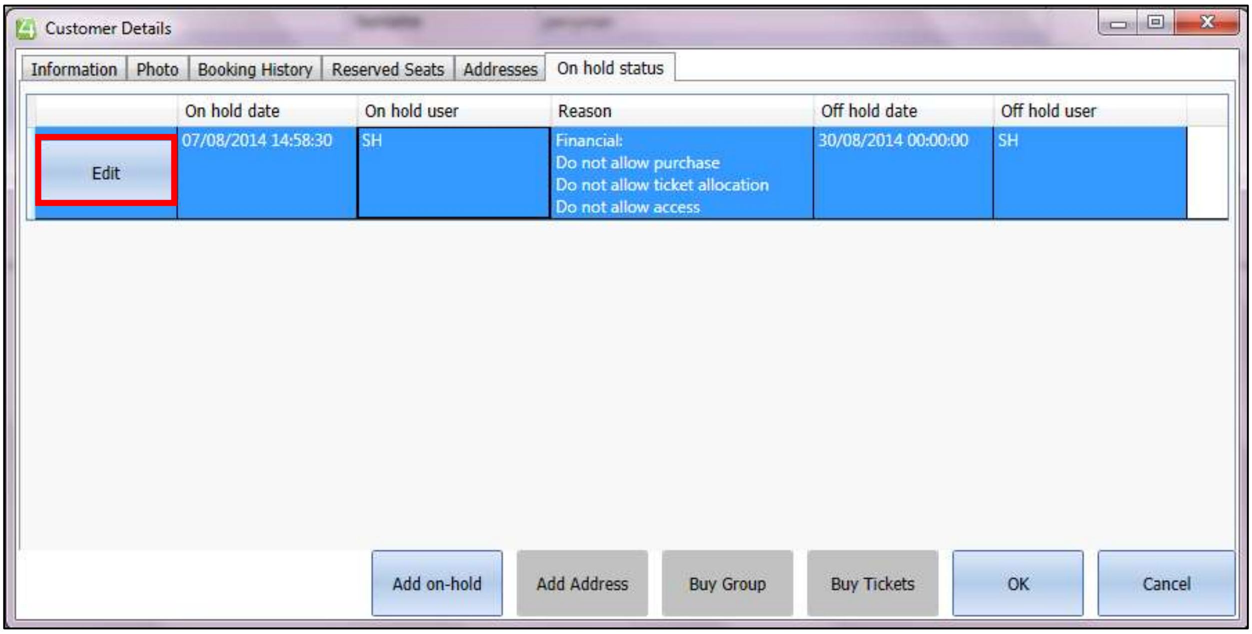
   - Do not allow purchase
   - Do not allow ticket allocation
   - Do not allow access.



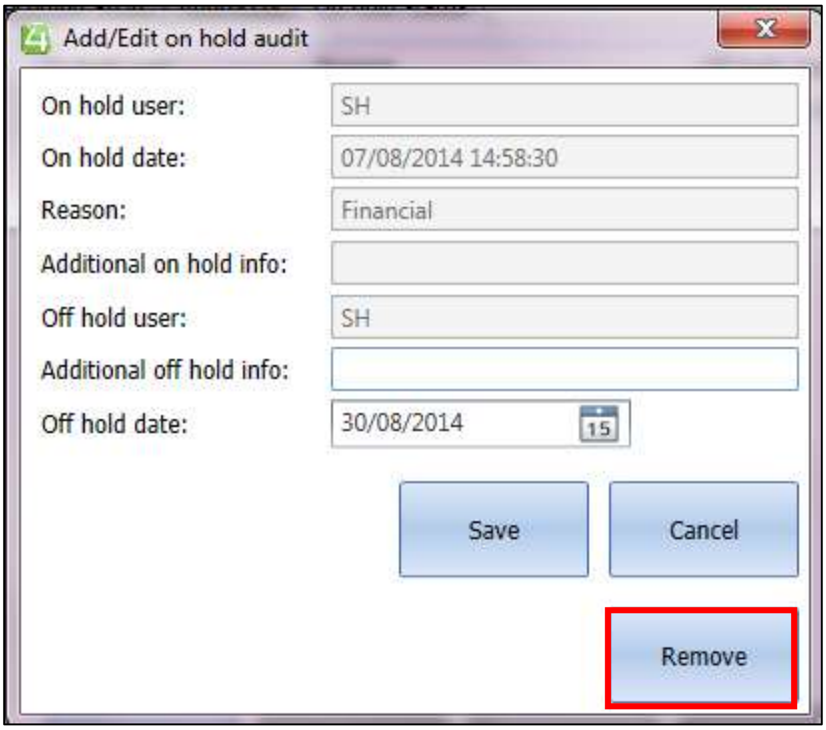
12. The following alert will be shown when a booking is made if the set up consists of the option 'Do not allow purchase'.



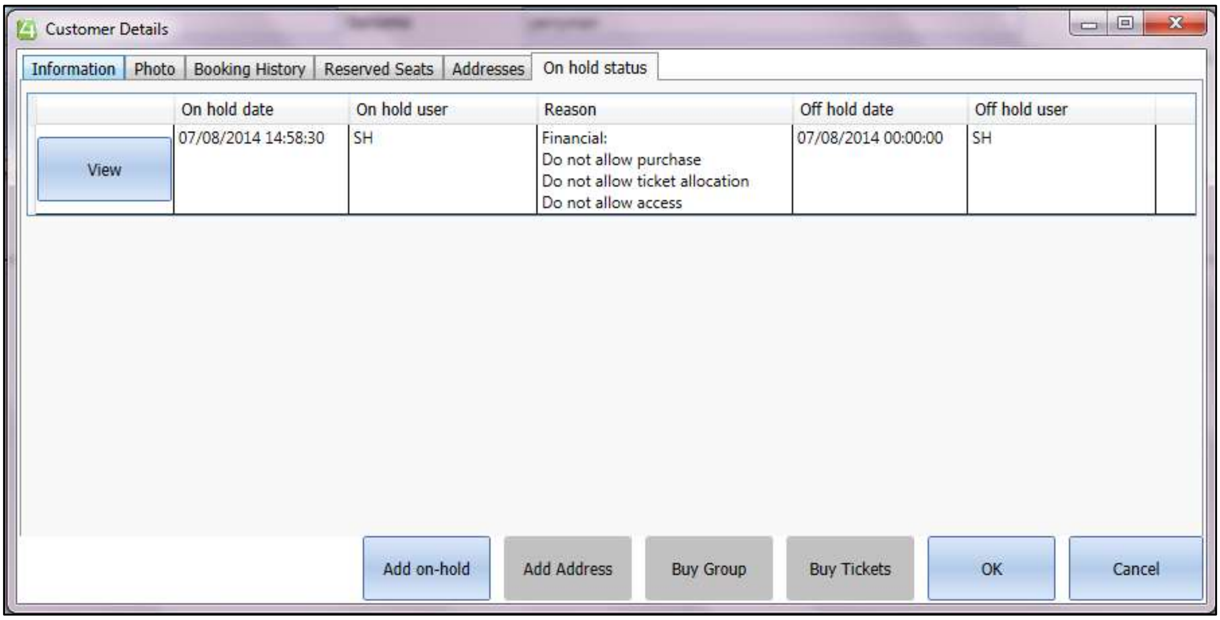
13. The customer can be taken off hold if required. This is done by opening the Customer Details form.
14. Select the On Hold record.
15. Select **Edit**



16. Select **Remove** or capture today's date in the **Off hold date** field.

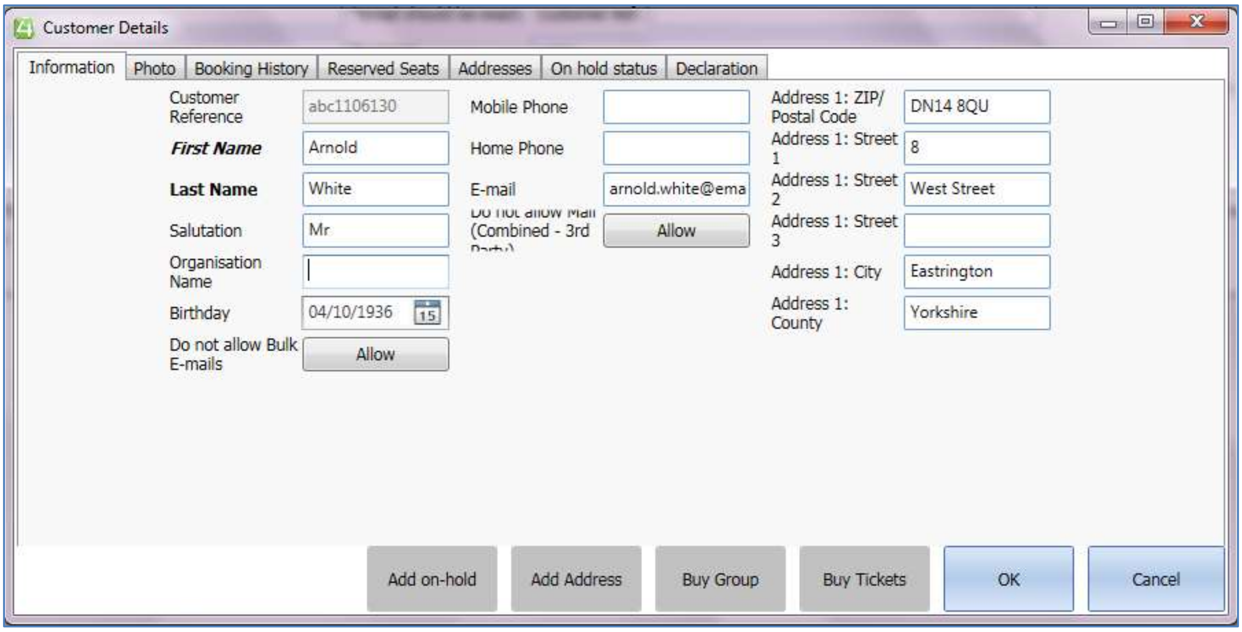


17. If the **Off hold date** field is set to today's date, the 'On Hold' status will be removed from the contact record.



18. An audit trail is maintained for the customer's on hold statuses and includes the name of the user who put the customer on hold and took the customer off hold.

5. CUSTOMER DETAILS DIALOG



The Customer Details dialog can be opened by selecting **View Purchaser** on the Booking Details dialog. From the Customer Details dialog the following options are available:

INFORMATION TAB

Select the **Information** tab to view the customer's details.

PHOTO TAB

It is possible to capture a photo of the customer via a camera on the POS. See Capturing a Photo for more information on how to do this.

BOOKING HISTORY TAB

Select the **Booking History** tab to view a list of previous bookings made by the customer. From the list bookings you can select to amend the booking (**Amend Booking**) or view the booking details (**Details**).

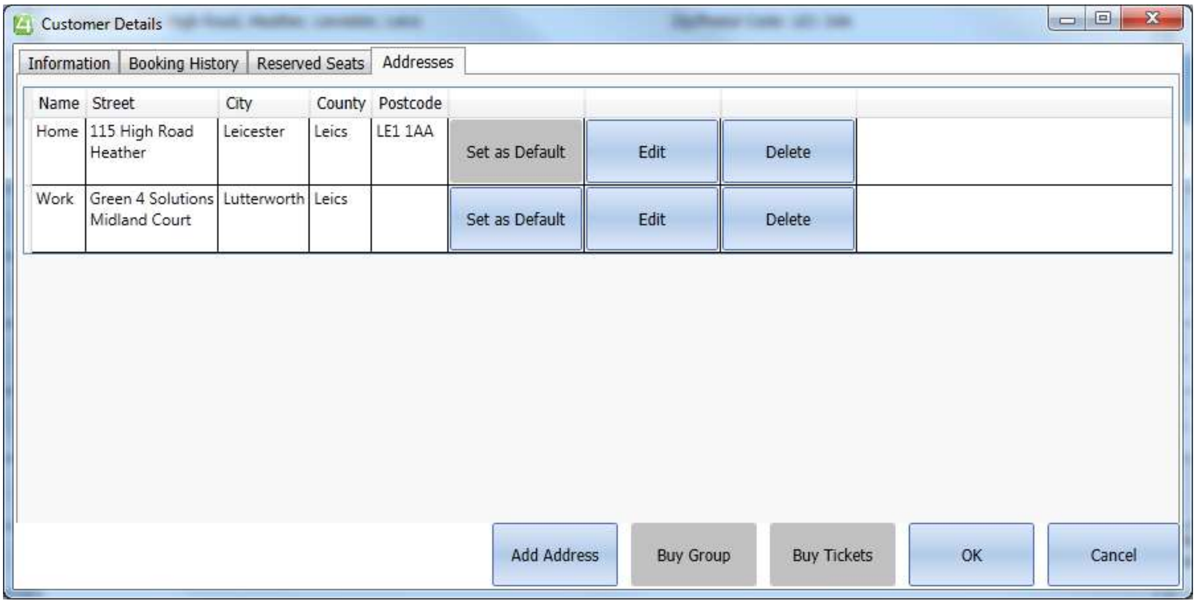
RESERVED SEATS TAB

Select the **Reserved Seats** tab to manage any reservations that have been created for the customer. See Reservations for more details.

ADDRESSES TAB

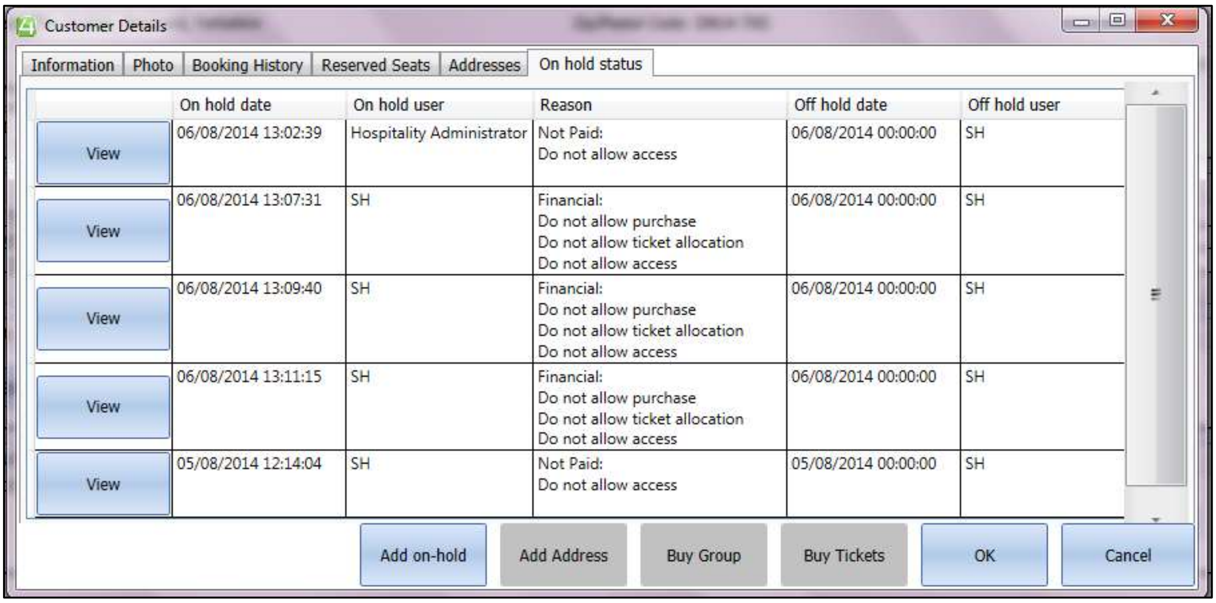
Select the **Addresses** tab to manage the customer's addresses. Using the tab you can select to:

- **Set As Default.** Set the address to be the customer's default address.
- **Edit.** Select to edit the address.
- **Delete.** Select to delete the address.
- **Add Address.** Select to add a new address for the customer.



ON HOLD STATUS TAB

Select the **On Hold Status** tab to view and manage the customer's On Hold Audit records and On Hold Status. To place a Customer on Hold see Putting a Customer on Hold.

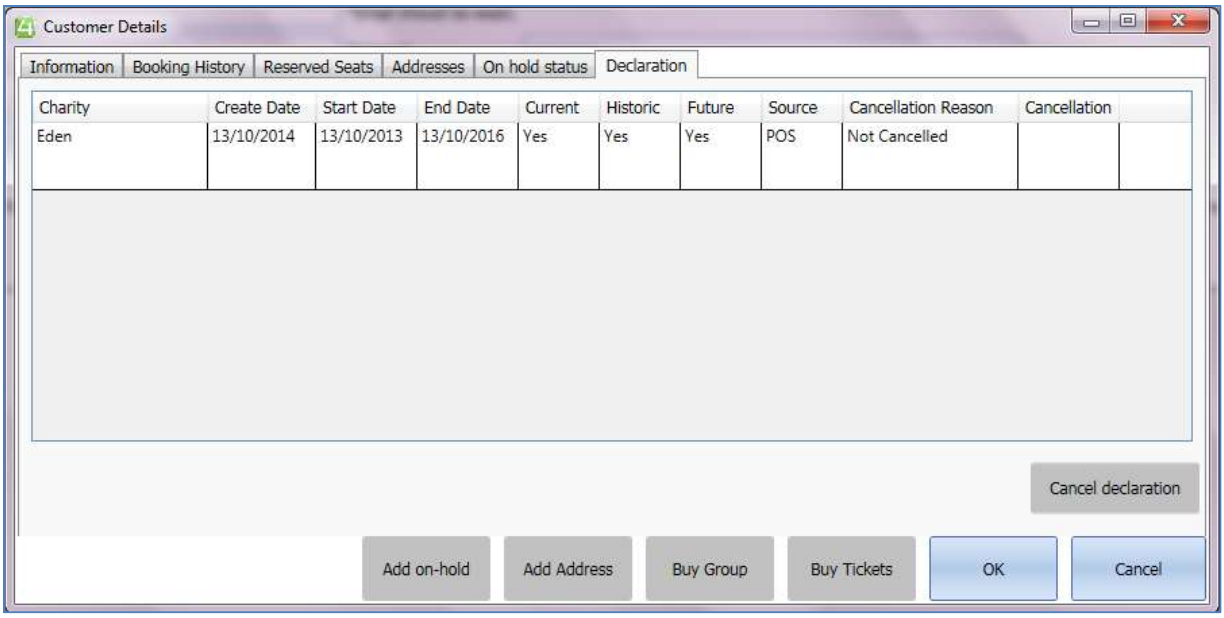


DECLARATION TAB

The Declaration tab contains a list of Gift Aid Declarations stored against the contact. The option exists for the Customer's Declaration to be cancelled. The following details pertaining to the Declaration are contained in the Declaration tab.

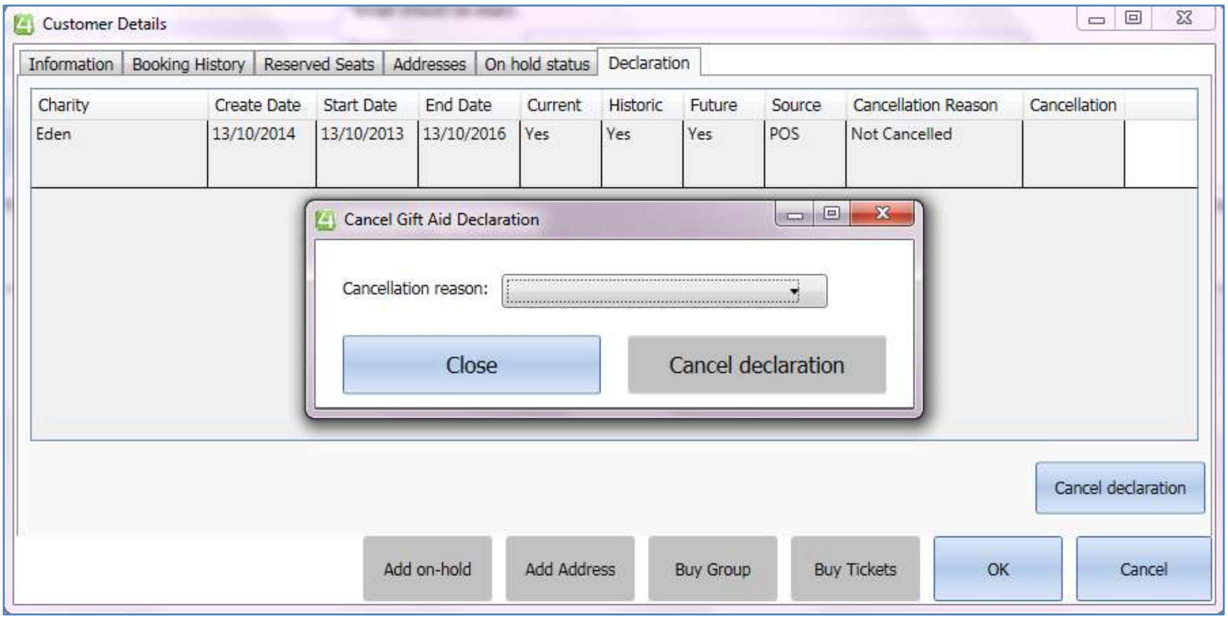
- **Charity.** The Charity against which the Declaration is held. This Charity will be able to claim Gift Aid donations made by this contact against this Declaration.
- **Create Date.** The date the Declaration was made.
- **Start Date.** The date from which the Declaration is valid.
- **End Date.** The date when the Declaration will expire.
- **Current.** If set to Yes, the Declaration is deemed valid for the current donations made.

- **Historic.** If set to Yes, the customer has allowed for Gift Aid to be claimed against historic donations made to the Charity back to the date specified.
- **Future.** If set to Yes, the customer has allowed for Gift Aid to be claimed against future donations made to the Charity up to the date specified.
- **Source.** The Channel where the Declaration was created.
- **Cancellation Reason.** If the Declaration has been cancelled, the reason will be listed here.
- **Cancellation Date.** The date the Declaration was cancelled.

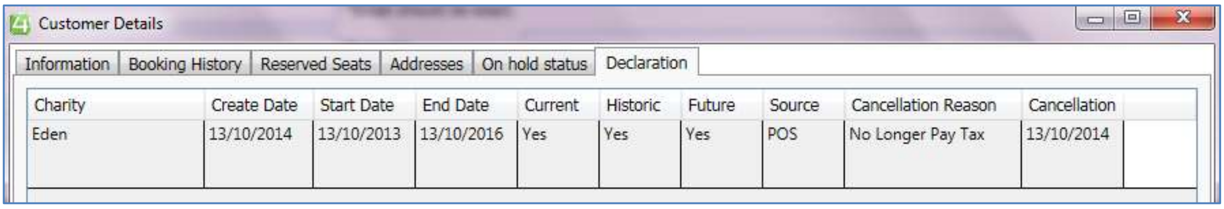


To cancel a Declaration:

1. Select the Declaration. This will highlight the Declaration line and activate the **Cancel declaration** option.
2. Select Cancel declaration.
3. Select a Cancellation reason from the drop down list and select **Cancel declaration**.



4. The Cancellation Reason and the Cancellation date will be updated.

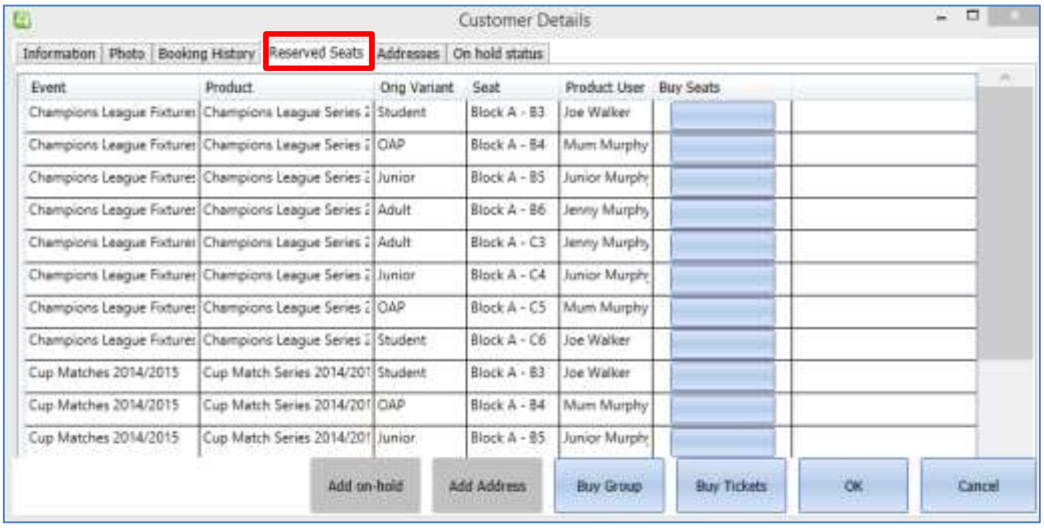


5.1. RESERVATIONS

The Reservations functionality in Green 4 Ticketing is used to reserve a ticket for a future event (e.g. cup match, friendly or new season ticket) for a customer that already holds a ticket (normally a season ticket).

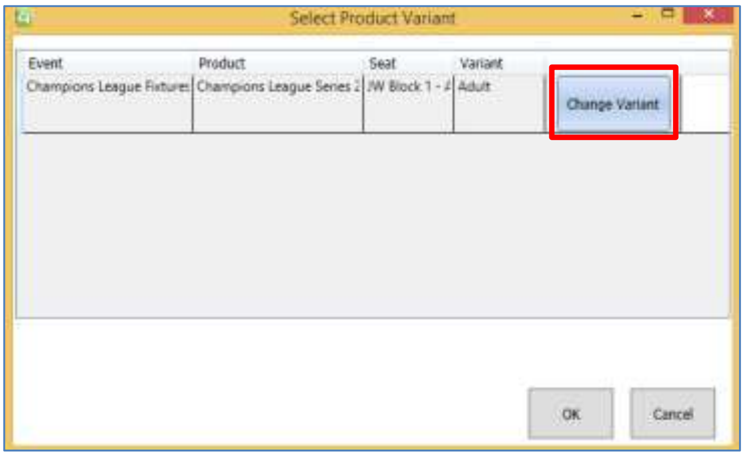
In the POS the tickets will be found by opening up a customer's Booking Details before selecting View Purchaser and the Reserved Seats tab. By default the customer will be offered the same variant type as they previously held, for example if they have an Adult season ticket they would be offered an Adult fixture ticket if this variant exists. However, the POS Operator will be able to change the variant type for the customer.

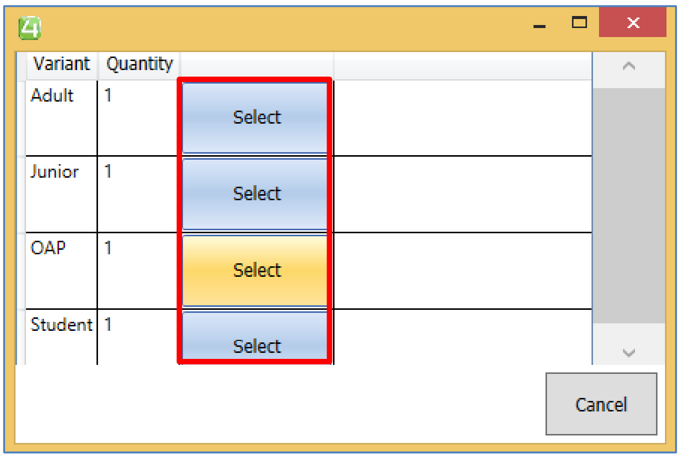
1. Select the Buy Tickets option.



2. The Select Product Variant view will be displayed as shown below.

3. To change the Variant of the reserved product, select Change Variant.





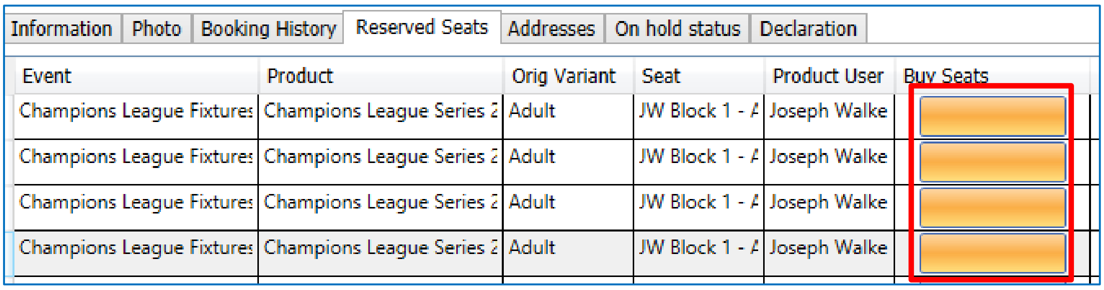
4. A new display will open where it is possible to Select the other Variant types related to this product.

BUYING GROUP RESERVED TICKETS ON THE POS:

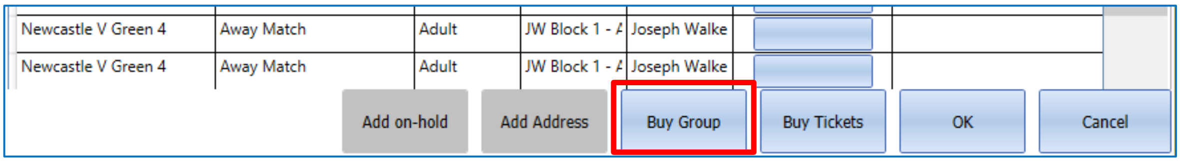
There is also the opportunity to **Buy Group** reserved tickets. This process turns a multple selection of single reserved tickets into a group ticket, e.g. a family ticket. Note: an apprpriate variant type that includes more than one person such as a Family variant must be connected to the bookable product for this to be possible.

To buy group reserved tickets:

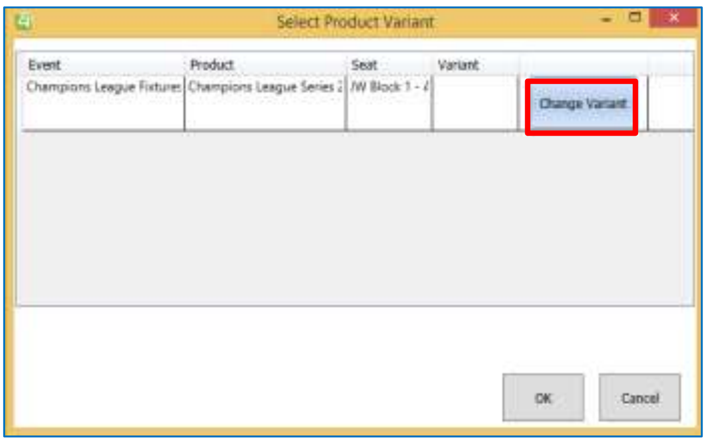
1. In EPOS open up a customers **Booking Details** before selecting **View Purchaser** and the **Reserved Seats** tab.
2. Select the seats that are to be bought as part of a group by selecting them in the Buy Seats collum of the Reserved Seats form (See below).

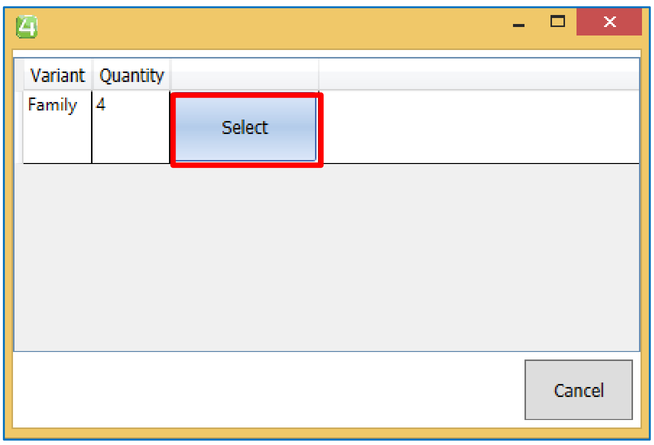


3. Once the seats have been selected, choose the **Buy Group** button at the bottom of the Reserved Seats form. This will open the Select Product Variant Form.



4. This will open the Select Product Variant Form.
5. Select **Change Variant**. A new form will open where it is possible to choose the group Variant, for example a Family.
6. When the new group variant has been selected, the Select Product Variant form will be displayed again. Select **Ok** to continue to purchase this group of tickets





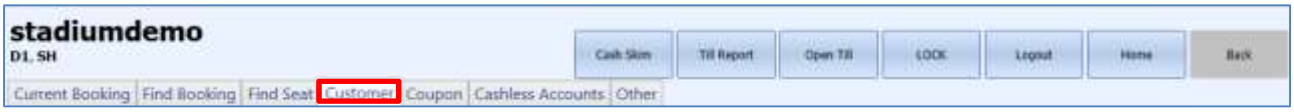
5.2. CAPTURING A PHOTO

If the functionality has been enabled and set up, it is possible to capture a photo via a camera on the POS.

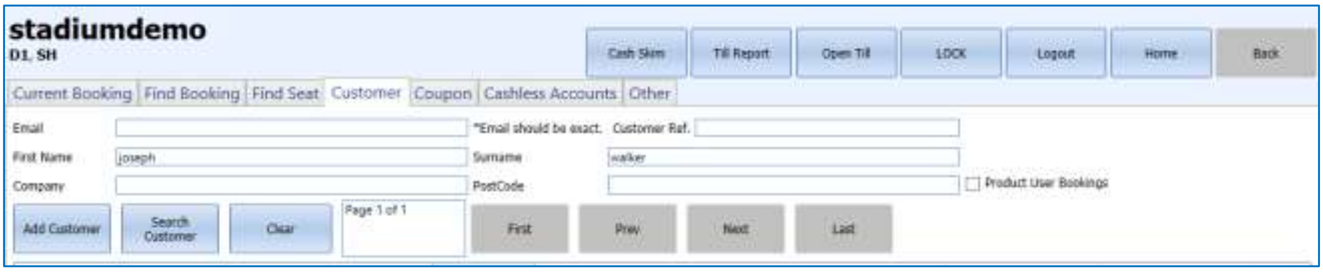
CAPTURING A PHOTO ON THE CUSTOMER DETAILS

A first way to take a picture on the POS is with the customer details open, this is used if a picture is to be added against the customer details. To do this complete the following:

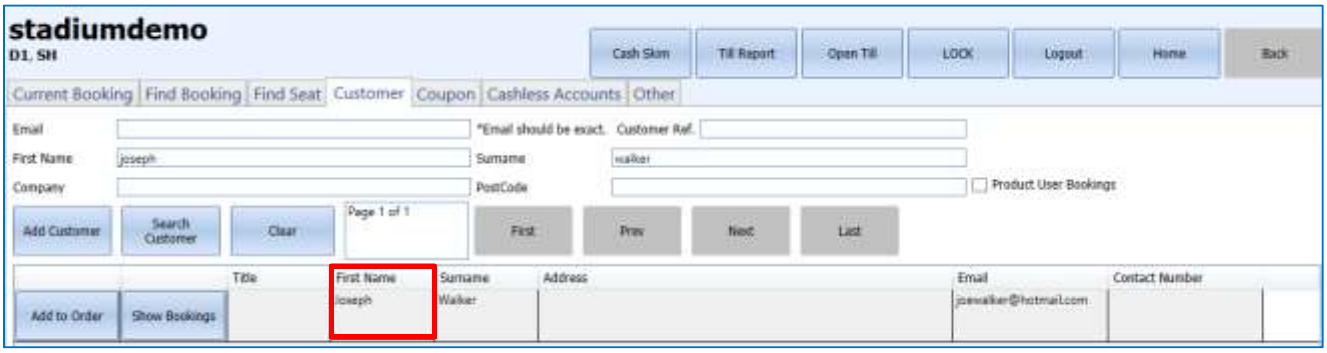
1. Select the **Customer** tab heading.



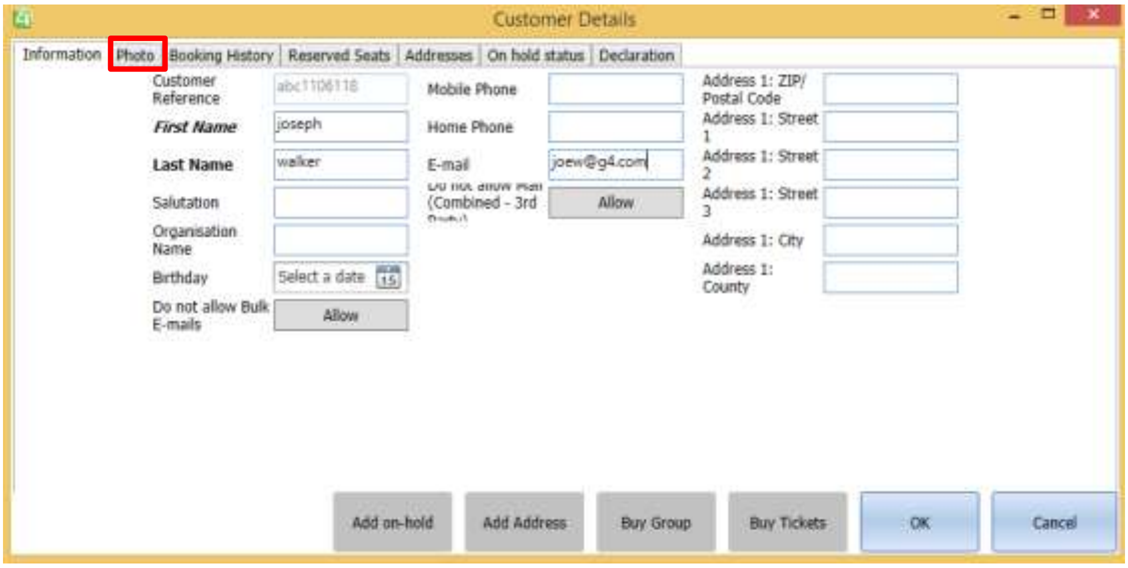
2. Use the fields to enter the information to be able to search for the customer that a picture is to be displayed against and select **Search Customer.**



3. The customer matching the search details will be displayed. Double Click on the **First Name** section of the customer that a photo will be added to.

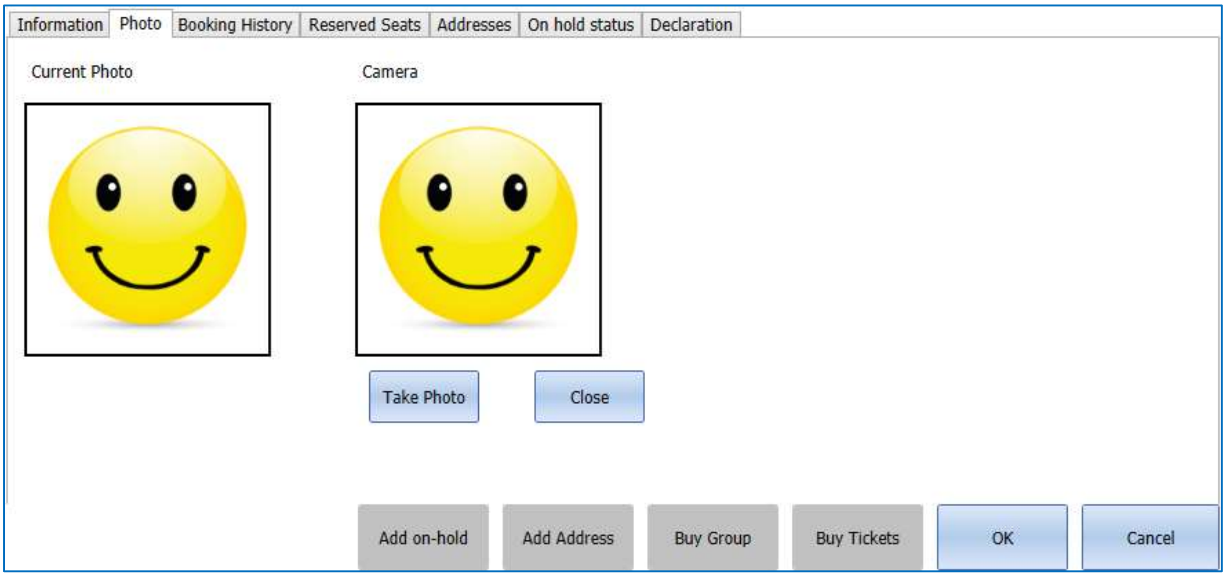


4. The Customer Details form will be displayed, in this form select the **Photo** tab.



5. The Photo tab will display the Current Photo and the view from the camera. If no photo has yet been added, the Current Photo will be a grey outline as shown below.

6. To take a photo select **Take Photo.** The Current Photo will change from the grey outline to the photograph that has just been taken as shown below.

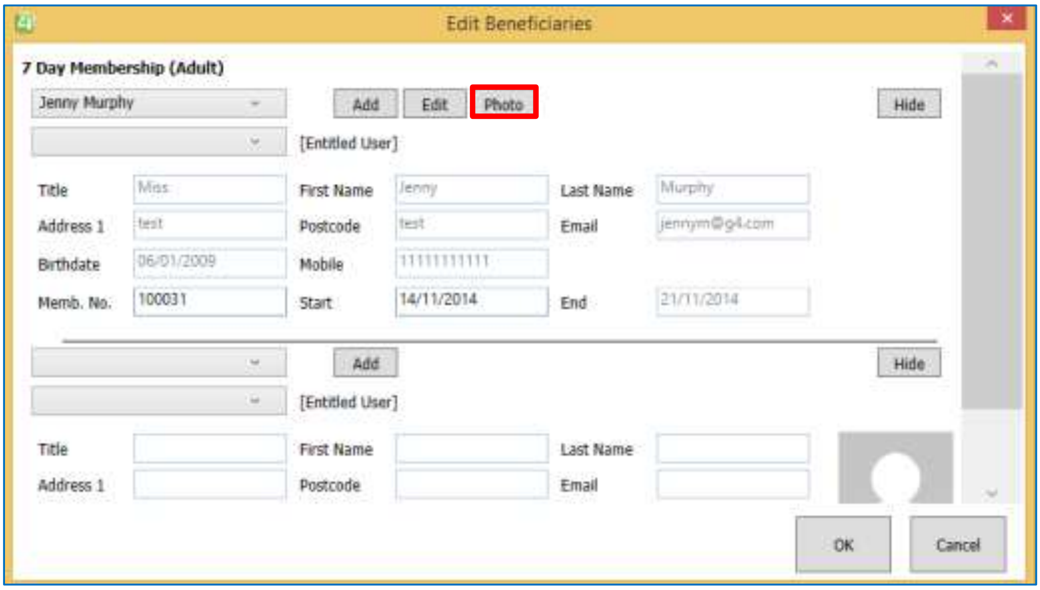


7. To take a photo select **Take Photo.** The Current Photo will change from the grey outline to the photograph that has just been taken. Select **Ok.**

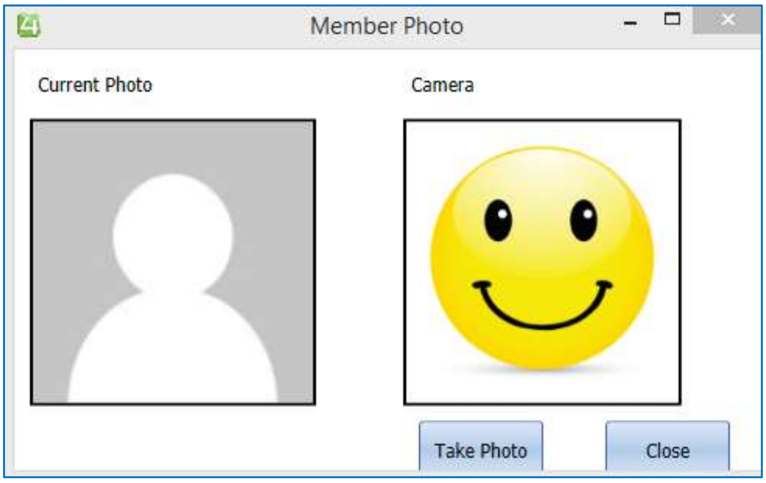
CAPTURING A PHOTO ON THE BENEFICIARIES SCREEN

A photo can also be added on the Beneficiaries screen on completion of a product being purchased, photos are often taken if the product is of type Membership. To capture a photo when completing the purchasing of a product complete the following:

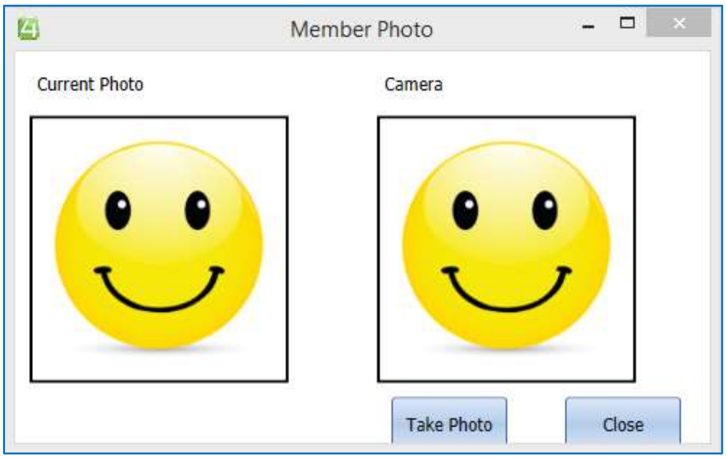
1. Complete the Payment of the product as normal until the **Edit Beneficiaries** Screen appears alternatively select **Beneficiaries** on completion of the payment of the product being taken.



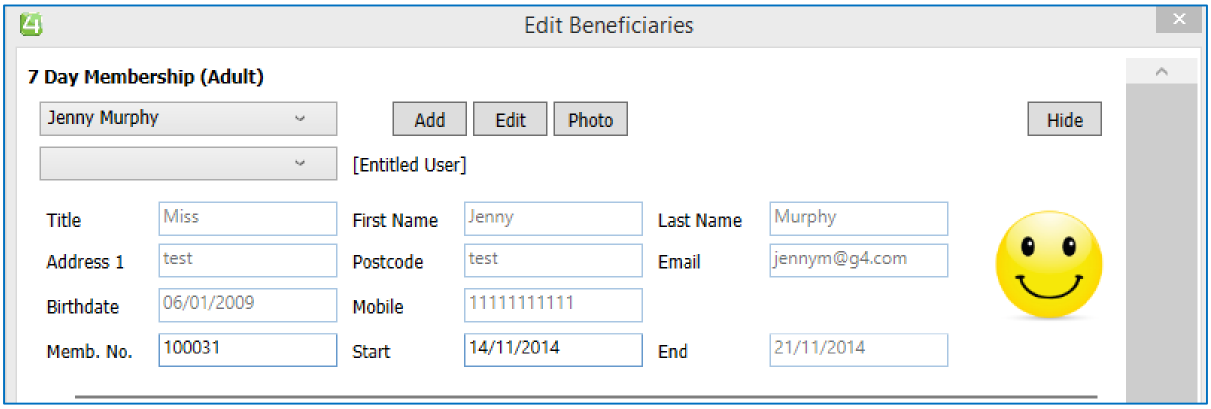
2. When the Edit Beneficiaries Screen is displayed complete the relevant details before selecting **Photo**, highlighted above.
3. A **Member Photo** box will appear displaying the current Photo and view from the camera. If no photo has been taken the Current Photo will display a grey outline as shown below.



4. To take a photo select **Take Photo.** The current Photo will update to display the photo that has just been captured as is shown below.



5. Select **Close**. The photo will be displayed in the Edit Beneficiaries form and will be associated to the customer. Select **Ok** and continue with the payment.



6. SEASON TICKETS

When a customer has purchased a season ticket, a number of additional functions can be made available which allows them to:

- Upgrade their season ticket for an individual fixture, for example if they wish to upgrade to a higher priced area of the stadium
- Move their season ticket for an individual fixture, for example if they wish to move to a different seat in the stadium, which costs the same price.
- Print a ticket for an individual fixture, for example if the customer has forgotten their ticket for a game, you can print a fixture ticket to allow them to enter the stadium for the game.
- Season Ticket Buy-Back functionality allows for fixtures to be offered up in exchange for loyalty points if a season ticket holder cannot attend a fixture, this will allow the season ticket holders seat to be put on general sale.

UPGRADE

To upgrade a season ticket for a fixture:

1. Open the series ticket booking details in the Booking Details dialog (see Finding a Booking for information on how to search for a booking).
2. Select **Upgrade/Move**.
3. The Current Booking screen will be displayed.

4. Complete the following details:
    - **Fixture.** Use the drop-down list to select the fixture the series ticket holder wishes to upgrade for.
    - **Tickets.** The currently held series tickets will be displayed. Select which tickets the holder wishes to upgrade.
5. Once the details are complete, select **Upgrade**.
6. The standard ticket selection page will be displayed. Complete the process of selecting the customer's seat type and position in the stadium.
7. The details will be added to the Shopping Cart in the usual manner.
8. The value of the series product previously purchased will be credited to the Shopping Cart.
9. Complete the booking in the standard way.

MOVE

To move a season ticket for a fixture:

1. Open the series ticket booking details in the Booking Details dialog (see Finding a Booking for information on how to search for a booking).
2. Select **Upgrade/Move**.
3. The Current Booking screen will be displayed.

4. Complete the following details:
   - **Fixture.** Use the drop-down list to select the fixture the series ticket holder wishes to move for.
   - **Tickets.** The currently held series tickets will be displayed. Select which tickets the holder wishes to move.
5. Once the details are complete, select **Upgrade**.
6. The standard ticket selection page will be displayed. Complete the process of selecting the customer's seat type and position in the stadium.
7. The details will be added to the Shopping Cart in the usual manner.
8. The value of the series product previously purchased will be credited to the Shopping Cart.
9. Complete the booking in the standard way.

PRINT FIXTURE TICKET

To print a fixture ticket that is linked to a series carry out the following:

1. Open the series ticket booking details in the Booking Details dialog (see Finding a Booking for information on how to search for a booking).
2. Select **Fixture Ticket**.
3. The Current Booking screen will be displayed.

4. Complete the following details:
    a. **Fixture.** Use the drop-down list to select the fixture the series ticket holder wishes to have printed.
    b. **Tickets.** The currently held series tickets will be displayed. Select which tickets the holder wishes printed.
5. Once the details are complete, select **Fixture Ticket**.
6. The Print Wizard dialog will be displayed allowing you to select the printer and transform.

6.1. USING SEASON TICKET BUY-BACK ON THE POS

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 put on general sale allowing the organisation to 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.

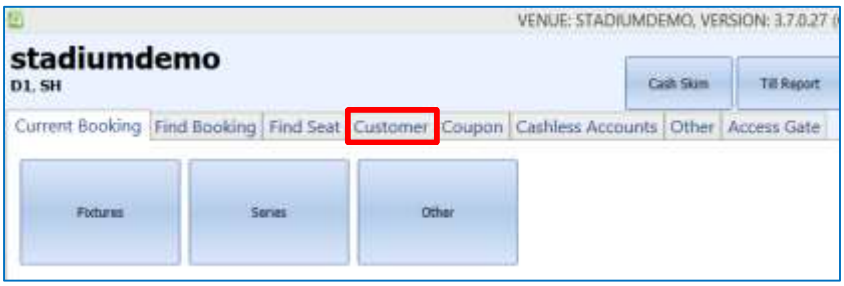
It is also possible for the offered up seat to be reclaimed by the customer (providing the seat has not already been sold) and additionally, if the offered up seats is not sold, it can be set so that the Season Ticket Holder still gains loyalty points but at a lower number in comparison if the seat was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

Note: The Season Ticket Buy-Back functionality will only be available if the Season Card has been printed. If a Season Ticket Card has been printed the Booking Details window will show **Printed** set to **Yes.**

STEP 1: OFFERING A TICKET ON THE POS

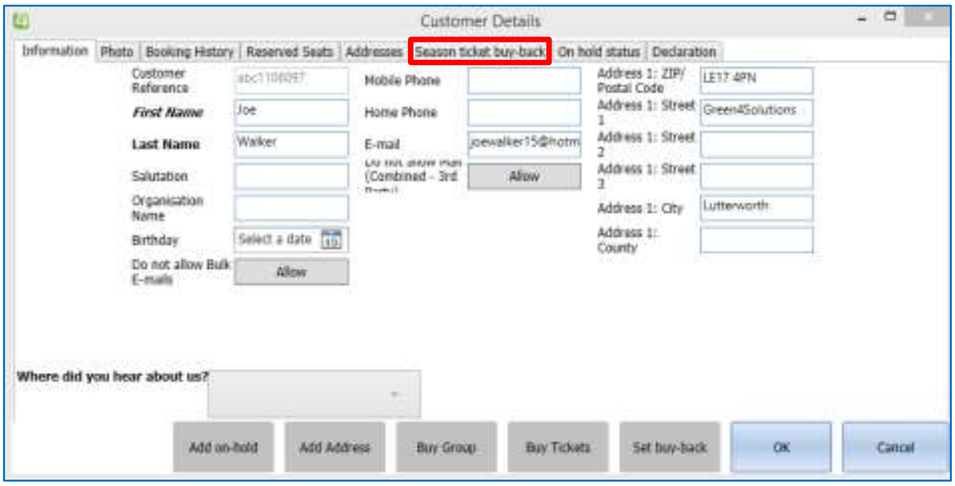
Season Ticket fixtures can be offered up via the Customer Details window on the POS. To access the Customer Details window and offer up a season ticket on the POS the following must be completed:

1. Log into the POS and select the **Customer** tab



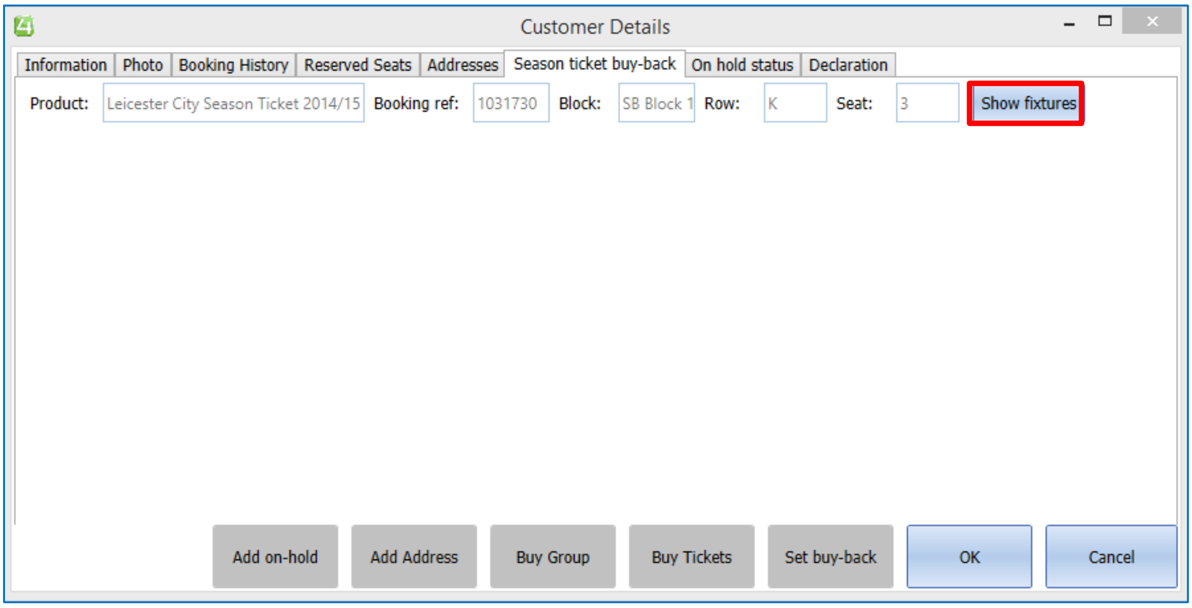
2. Enter the details of the Season Ticket Holder who is offering up their seat and select **Search Customer.**
3. Open up the relevant customers details by double clicking on their name. The Customer Details form will be displayed. Select the **Season ticket buy-back tab**.

Note: If a Beneficiary has been added to the Season Ticket when being purchased, the Season Ticket Buy Back Functionality will be available under both the Purchaser and Beneficiaries customer details form.

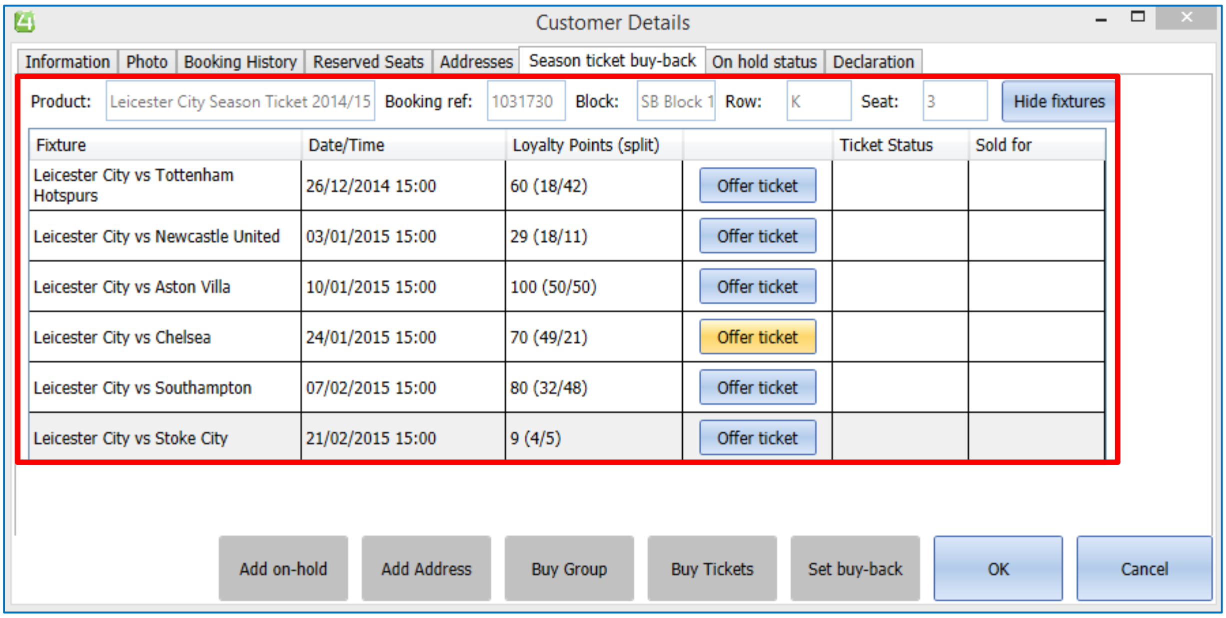


4. The Season Tickets related to the customer will be shown. The **Show Fixtures** button will toggle between showing and hiding the fixtures related to the season ticket by selecting it.

5. Select the **Show Fixtures** button that is aligned next to the Season Ticket that is going to be offered as highlighted below.



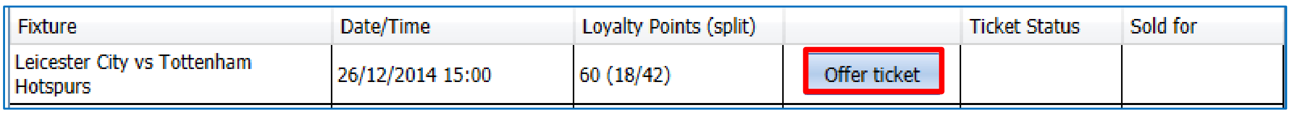
6. The available fixtures that the seat can be offered for will be displayed in a table as is shown below. The following describes the headings of the table:



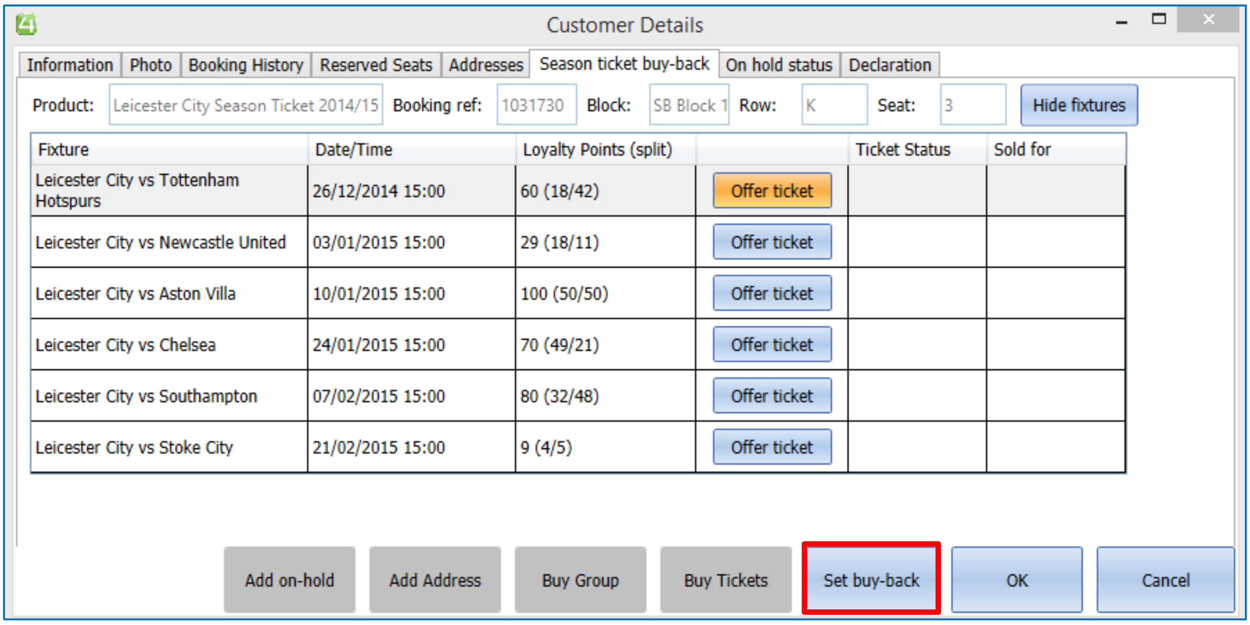
- **Fixture.** This will display the fixtures that are available to offer a ticket to.
- **Date/Time**. This will display the start date and time of the fixture.
- **Loyalty Points (split).** This will display the total number of points which will be credited if the seat is **offered up but not sold** and also the total number of points which will be credited if the seat was **offered-up and sold.** Using the above example of Leicester City v Southampton, 80 is the total number of points which will be credited if the seat was offered-up and sold, 32 is the number of points credited if the seat is offered up and not sold whilst a further 48 points are gained if the seat is sold. Please note that if a Loyalty Increment has been added against a block, the Loyalty Points field will automatically update and increase the total Loyalty Points by the percentage that has been added against the block.
- **Button Column.** This will display the various options available to select if choosing to offer up a ticket or contrastingly reversing this decision by reclaiming the seat.
- **Ticket Status.** This will display the status of the ticket. The status can be shown as either:
    - **i. Blank (Empty).** The seat has not been offered-up for buy-back.
    - ii. **On offer.** The seat is available for purchase. This would occur if the fixture buy-back flag is set to Immediately in CRM.
    - **iii. On offer (Not released).** The seat has been offered-up, but is not being shown for purchase yet. These would occur if the fixture buy-back flag in CRM is set to On Demand.
    - **iv. Purchased.** The seat has been sold

- **Sold for.** This will appear blank until the offered up seat has been purchased, it will then display the price that the ticket was purchased for.

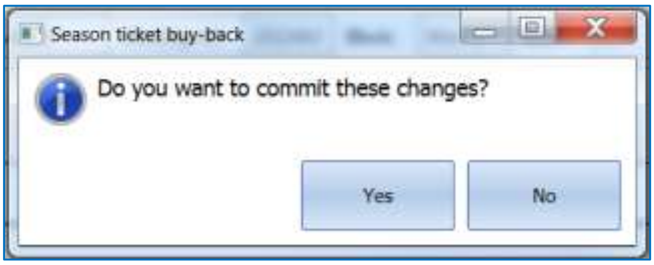
7. To offer the ticket for a fixture select the **Offer Ticket** button in the table for the relevant Fixture. The Offer Ticket button will turn orange.



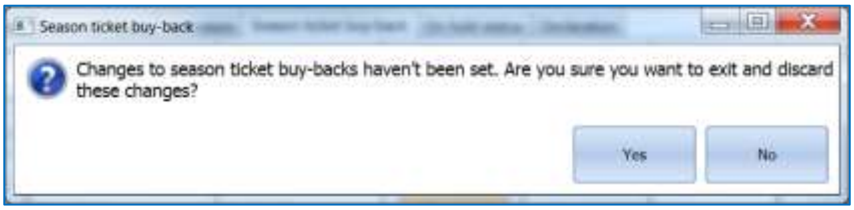
8. Next, Select the **Set Buy-Back** button.



9. A confirmation will be displayed, to confirm that the tickets will be offered up for general sale select **Yes.** If **No** is selected no changes will be made and the tickets will not be offered up.

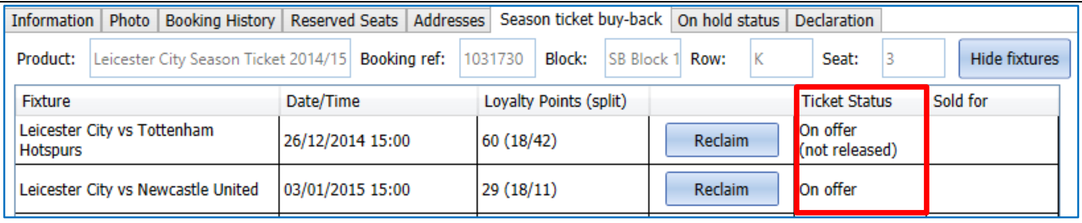


Note: If either the **OK** or **Cancel** button is selected from the Customer Details window and a ticket has been offered but the Set buy-back button has not been selected then the following prompt will appear.

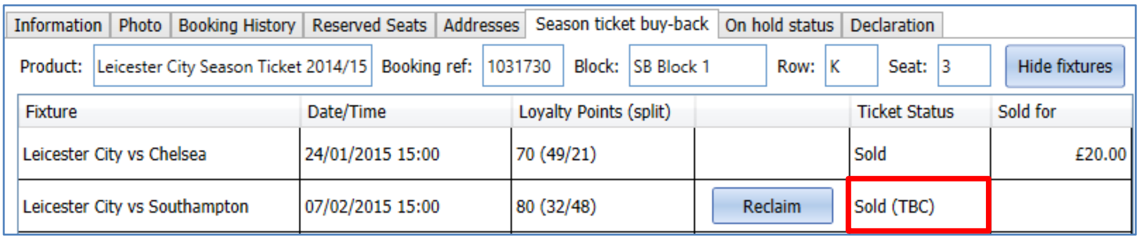


- **Changes to season ticket buy-backs haven't been set. Are you sure you want to exit and discard these changes?** By selecting **Yes** the Customer Details screen will be closed and any buy-back changes will be discarded. If **No** is selected, the operator will be returned to the Customer Details screen where the Set Buy-Back button can be chosen.

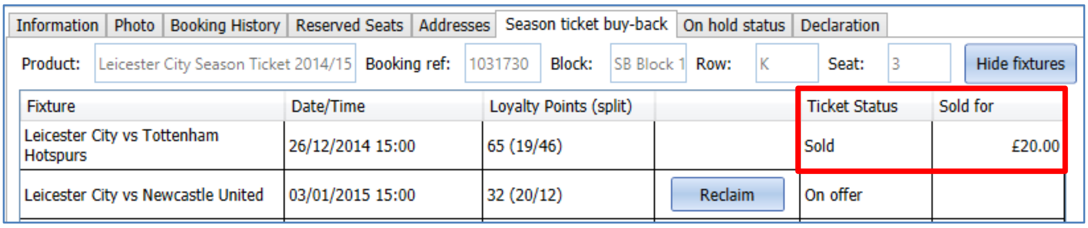
Note. When a ticket is offered the Ticket Status In the table on Season Ticket buy-back tab of the customer details screen will either display **On offer** if in the fixture form in CRM the field Release Buy-backs is set to immediately or alternatively if this field has been set to On Demand the Ticket status section of the table will display **On offer (not released).**



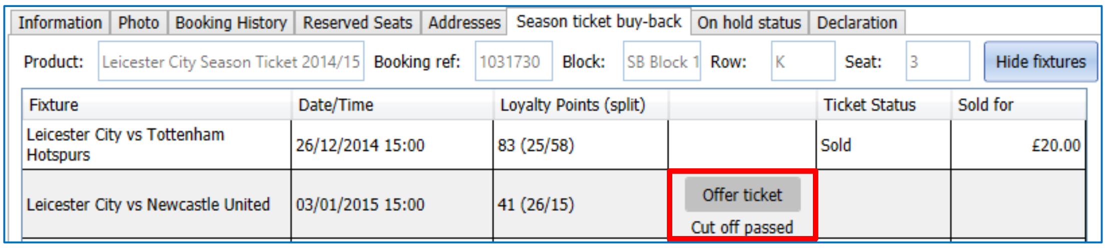
When an offered ticket is in the process of being sold, but the purchase has not actually been completed, the Sold for section of the Ticket Status section of the table will display **Sold (TBC)**, as is displayed in the example below:



When an offered ticket has been sold, the Sold for section of the table will display the price that the ticket has been sold for and the Ticket Status section will change to **Sold**. as is displayed in the example below:



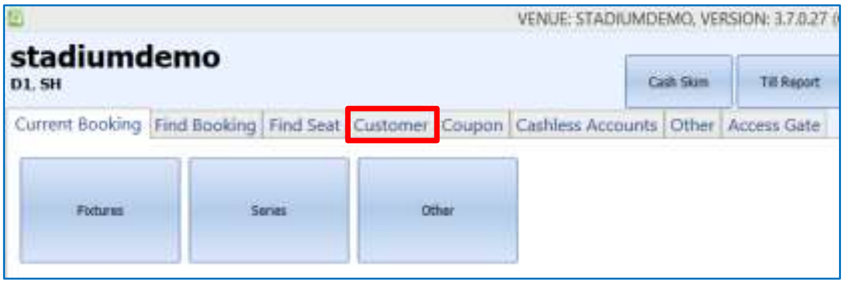
If a **Buy-back cut off before start time** has been entered in a Fixture form in CRM, then if this time has been reached before the start of the fixture the ticket will no longer be able to be offered and the message **Cut off Passed** will be shown beneath the greyed out Offer ticket button. This is displayed in the example below:



STEP 2: RECLAIMING A TICKET ON THE POS

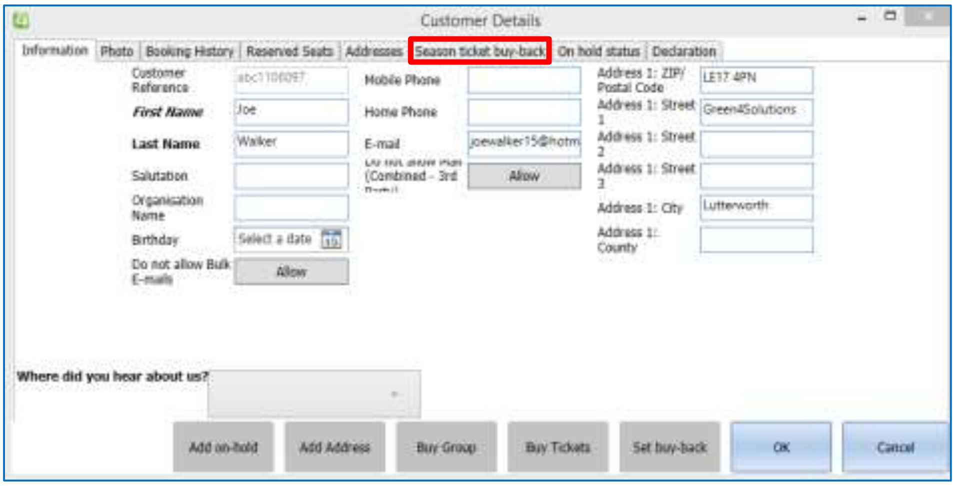
Once a ticket has been put up for offer by a Season Ticket Holder, it is possible for them to reclaim it as long as the ticket has not been sold. To reclaim a ticket complete the following. Please note that this section presumes that a ticket has already been offered.

1. Log into the POS and select the **Customer** tab.



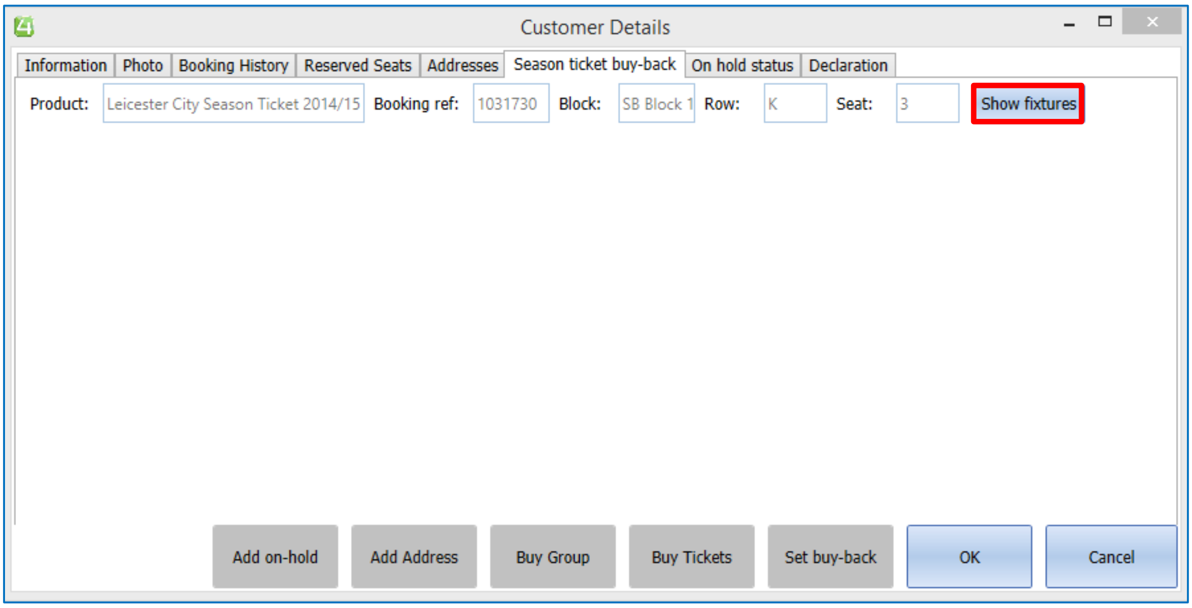
2. Enter the details of the Season Ticket Holder who is reclaiming their seat and select **Search Customer.**

3. Open up the relevant customers details by double clicking on their name. The Customer Details form will be displayed. Select the **Season ticket buy-back tab**.

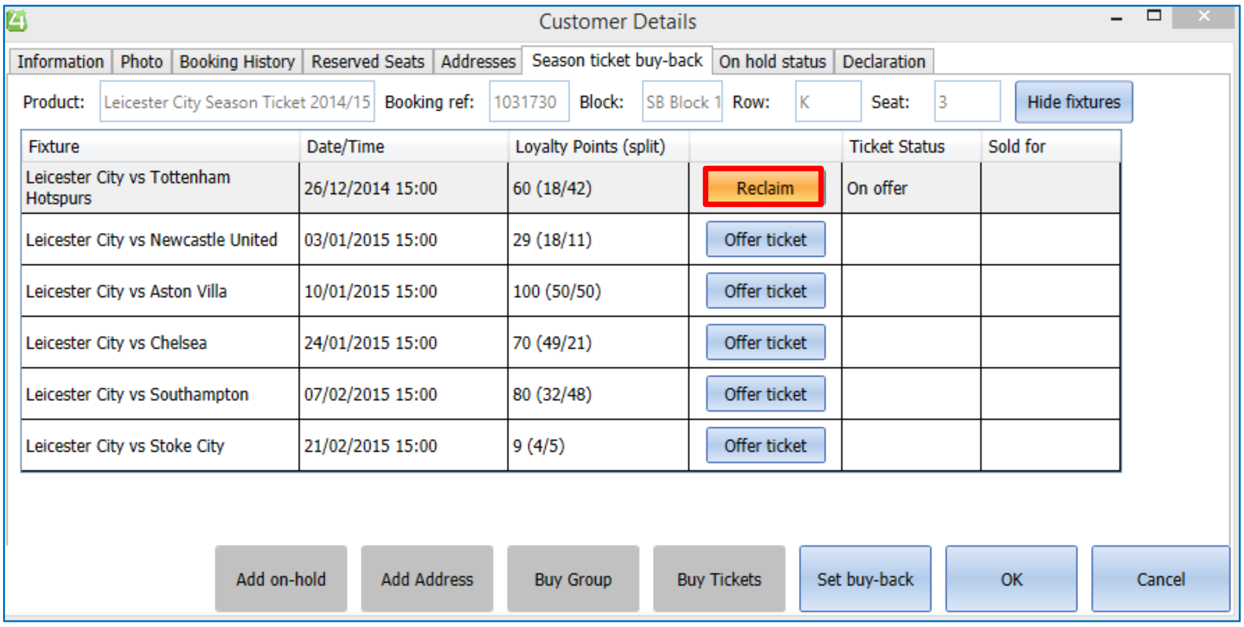


4. The Season Tickets related to the customer will be shown. The **Show Fixtures** button will toggle between showing and hiding the fixtures related to the season ticket by selecting it.

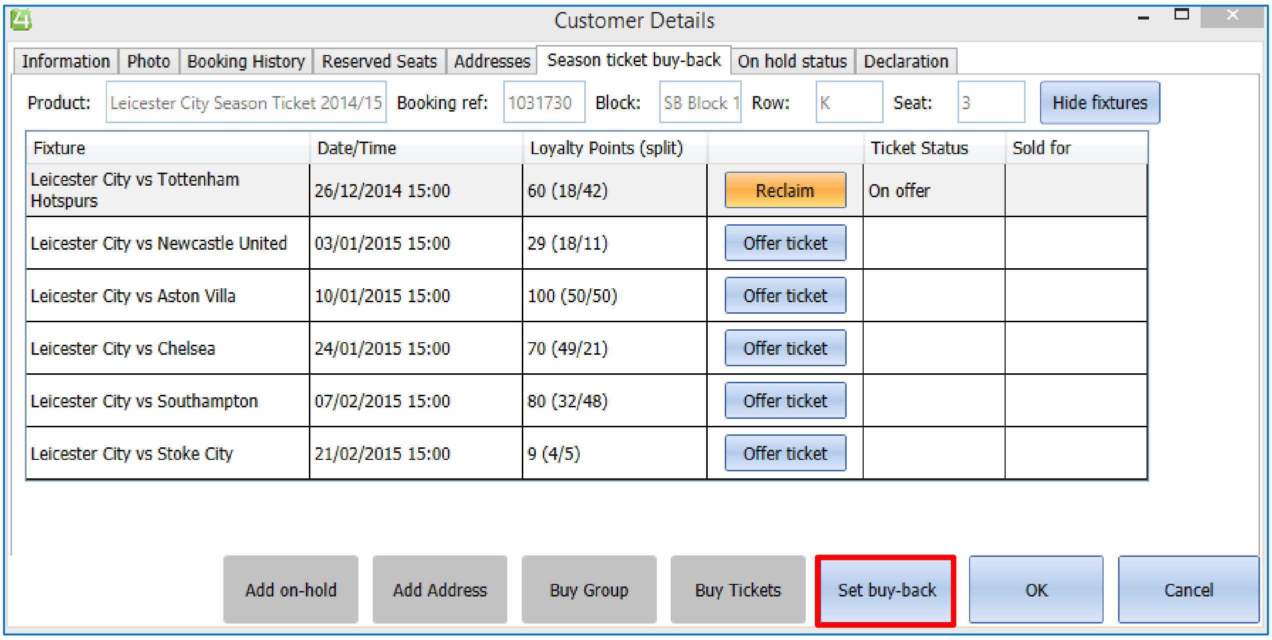
5. Select the **Show Fixtures** button that is aligned next to the Season Ticket that is going to reclaim a fixture from as highlighted below.



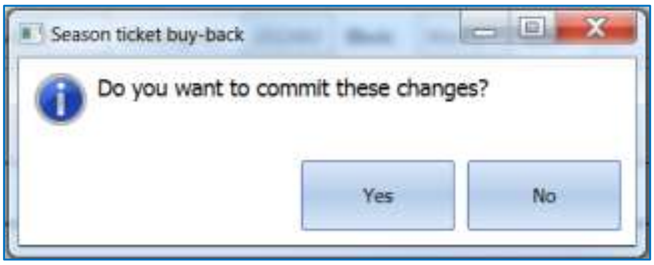
6. For a fixture that has already been offered-up the button aligned in the table to the fixture will be displayed as reclaim, as is highlighted below. Select **Reclaim,** the reclaim button will turn orange when clicked.



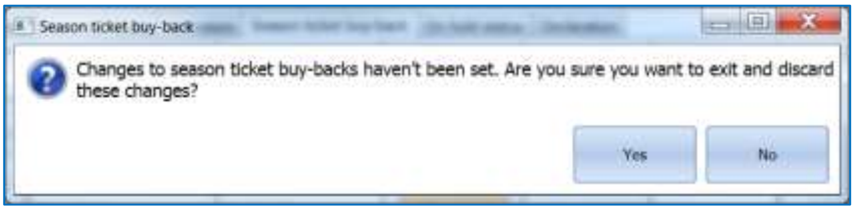
7. Next, select the **Set buy-back** button.



8. A confirmation dialogue will be displayed, to confirm that the tickets will be reclaimed from general sale select **Yes.** If **No** is selected no changes will be made and the tickets will not reclaimed.



Note: If either the **OK** or **Cancel** button is selected from the Customer Details window and a ticket has been offered but the Set buy-back button has not been selected then the following prompt will appear.



- **Changes to season ticket buy-backs haven't been set. Are you sure you want to exit and discard these changes?** By selecting **Yes** the Customer Details screen will be closed and any buy-back changes will be discarded. If **No** is selected, the operator will be returned to the Customer Details screen where the Set Buy-Back button can be chosen.

Access Control: When a Season Ticket Card is **Offered** a Blacklist is created meaning that the Season Ticket Card cannot be used for the Offered up fixture. If a fixture is **Reclaimed**, then the selected fixture will be whitelisted on the Season Ticket Card and the card can then be used to access the selected fixture.

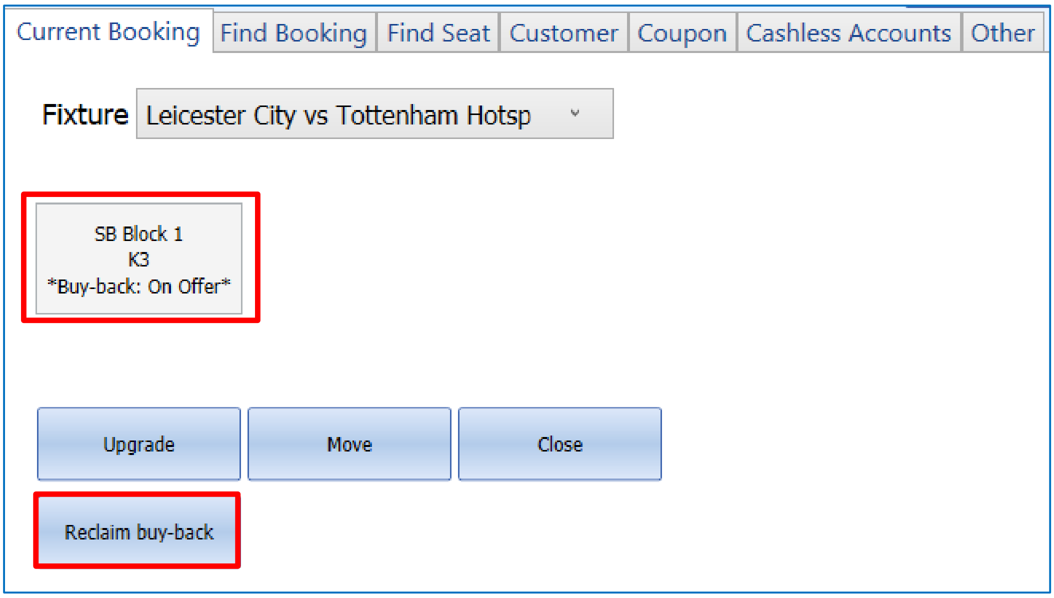
UPGRADING AND MOVING AN OFFERED-UP SEASON TICKET

Once a seat has been offered up for buy-back, the Season Ticket Holder will not have the ability to upgrade or move the ticket whilst the seat is on offer. If a Season Ticket Holder attempts to move or upgrade their season ticket for a fixture that they have already offered-up, they will be unable to do this.

On the POS, the Move/Upgrade screen will show this by disabling the seat toggle buttons related to that seat. The additional text of ***Buy-Back: On Offer*** will also appear on the offered up seat option.

From the Move/Upgrade screen it is also possible to select the **Reclaim buy-backs** button as long as the seats have not been sold. If this is selected the Contact Details window will open with the Season ticket buy back tab displayed and the ticket can be reclaimed from here as is explained in Step 2: Reclaiming a Ticket on the POS

Note: The same above principle applies if attempting to gain a fixture ticket for an offered up fixture on the POS. If a ticket has been offered this process will be unavailable.



6.2. ADDING FIXTURES TO A SEASON TICKET CARD ON THE POS

This functionality allows for fixtures to be added to an active Season Ticket card. The purpose of this functionality is to allow for any fixture that is not part of a Season Ticket but can be brought individually, such as a cup game fixture, to then 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 no paper ticket will need to be printed.

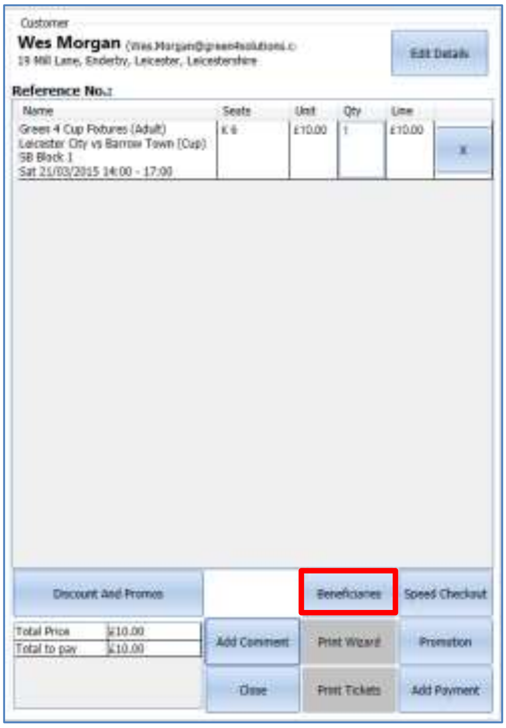
ADDING A FIXTURE TO A SEASON TICKET- ALTERNATIVE SEAT

If a Season Ticket holder can have an alternative seat, other than their normal Season Ticket seat, assigned to their card for a certain fixture that is not included in a Season Ticket, such as a cup game, the setting in CRM must be set to **Allow alternative seat on card**- **Yes**. This will allow a Season Ticket holder to have any seat selected to be assigned to their card.

1. Firstly, the fixture that is to be added to the Season Ticket card must be added to the basket in the POS. Fixtures are then assigned to a Season Ticket card on the **Edit Beneficiaries** screen.

Note: The Edit Beneficiaries screen appears upon Adding Payment on the POS, if the Bookable Product has been selected to **Beneficiary- Required** in CRM.

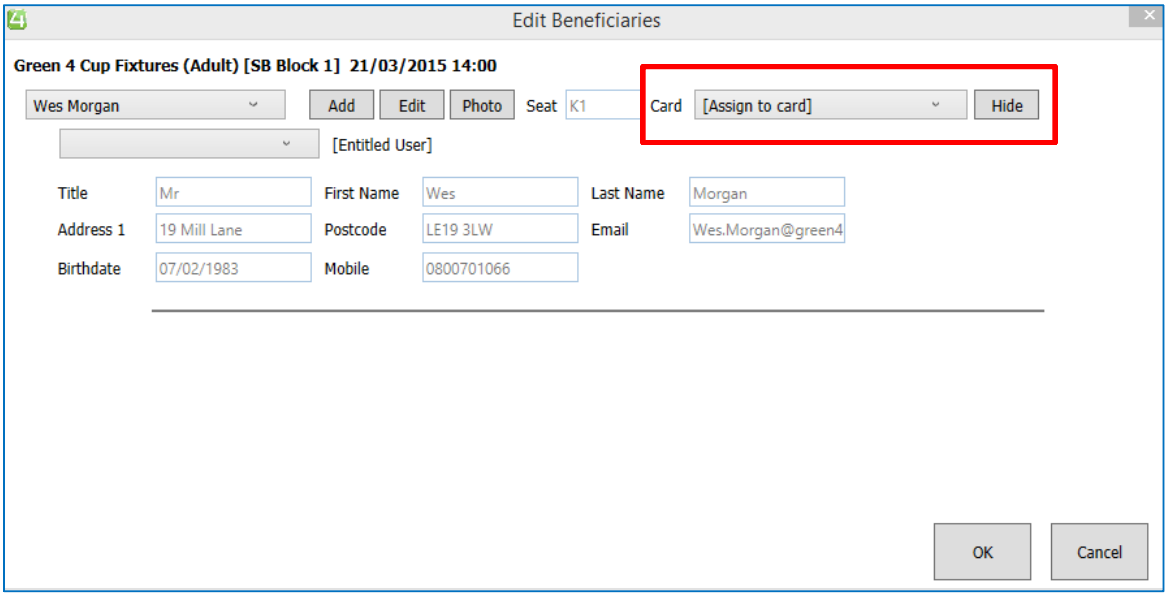
Alternatively the Edit Beneficiaries screen can be found in the basket area of the POS. Before selecting Add Payment click on Beneficiaries (Highlighted below). This must be selected if the Bookable Product has been selected to **Beneficiary- Requested in CRM**.



---

2. With the Edit Beneficiaries screen open, select the beneficiaries name from the drop down list, the fields of the Edit Beneficiaries screen will become populated. If no customer name is shown from the drop down list, select **Add**. This will display a new screen where an existing customer can be searched for.

3. If in CRM **Allow alternative seat on card** has been selected to **Yes**, any seat that has been selected, even if it is not the Season Ticket holder's normal seat, can be added to the Season Ticket card. If this is the case, upon selecting the Beneficiaries name the **[Assign Card]** drop down will become available.



4. To add the fixture to a Season Ticket card the drop down list entitled **[Assign to Card]** must be completed.

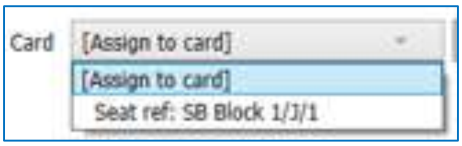
Note. If the selected beneficiary does not have any valid Season Tickets which can be used, then the drop list will be disabled.

Additionally if in CRM the setting **Allow alternative seat on card** is selected to **No** and a seat that is not the Season Ticket holders normal seat has been selected, the drop down list will be disabled.

5. From the **[Assign Card]** drop down list, select the Season Ticket card that the fixture is to be assigned to. The drop down will display all valid Season Ticket cards associated to the selected beneficiary.

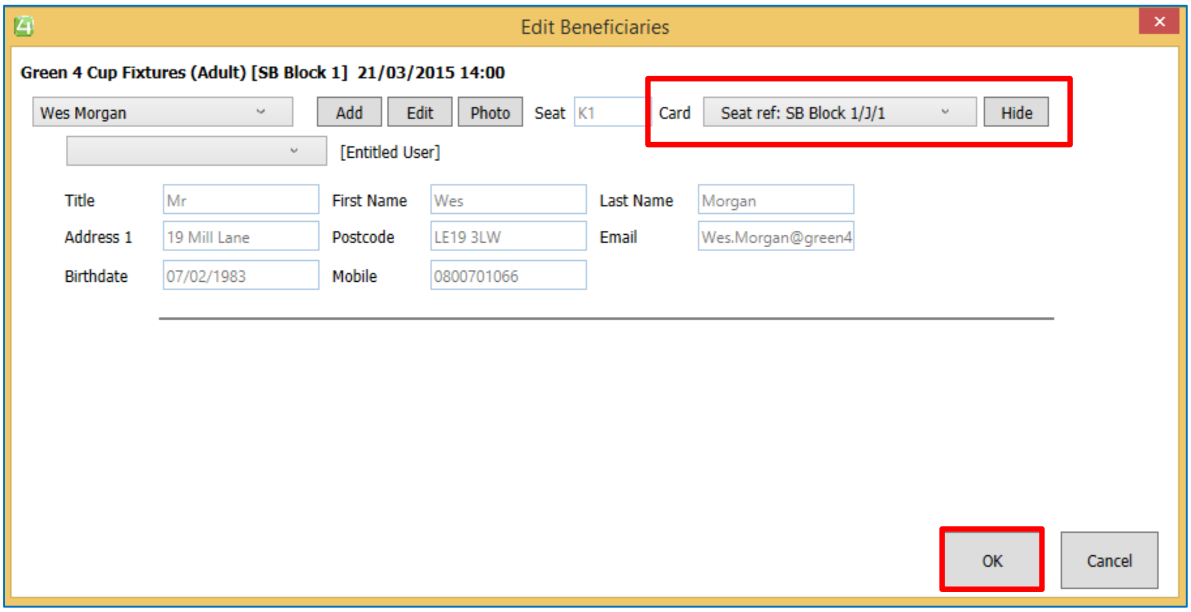
   As a different seat to that of the Season Ticket holders' normal seat is being added to the card, the Seat and Card field in the Edit Beneficiary will show different seat details.

   If the default **[Assign to card]** option is chosen then the fixture will not be assigned to any Season Ticket card.



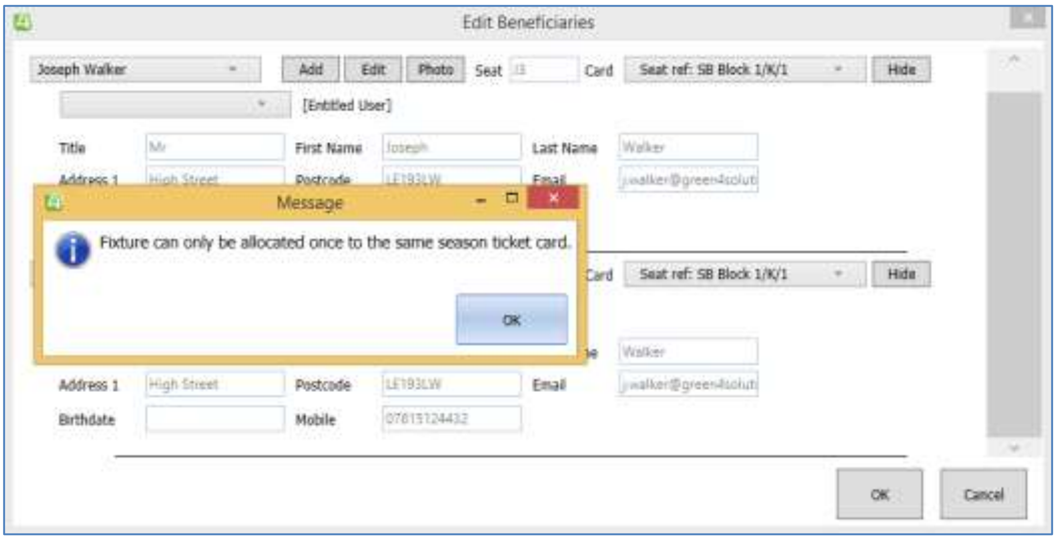
Note. The seat reference in the **[Assign to card]** drop down list is shown as: Block Name/Row/Seat.

6. Upon assigning a card to the beneficiary, select **Ok** in the Edit Beneficiaries screen.



7. Upon assigning a card to the beneficiary, select **Ok** in the Edit Beneficiaries screen.
8. Payment can then be made normally for the fixture by selecting **Add Payment** in the basket.

It is only possible to assign **one ticket** for the selected fixture to **one card**. If two or more tickets are attempted to be added to one Season Ticket card, upon selecting OK in the Edit Beneficiaries window the message; **Fixture can only be allocated once to the same season ticket card** will be displayed, as is shown in the below example.



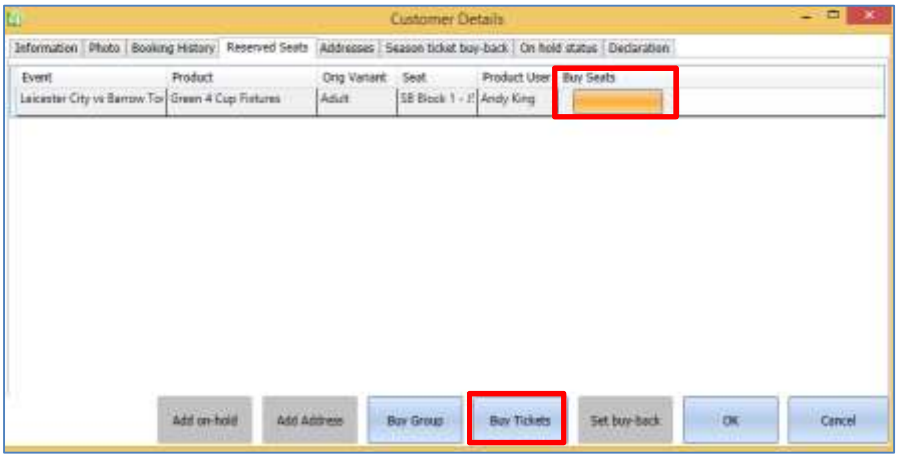
ADDING A FIXTURE TO A SEASON TICKET- THE SEASON TICKET HOLDERS USUAL SEAT

If a Season Ticket holder can only have their own Season Ticket seat assigned to their card for a certain fixture that is not included in a Season Ticket, such as a cup game, the setting in CRM must be set to **Allow alternative seat on card**- **No**. This will prevent a Season Ticket holder from having a seat that is not their usual Season Ticket seat assigned to their card.

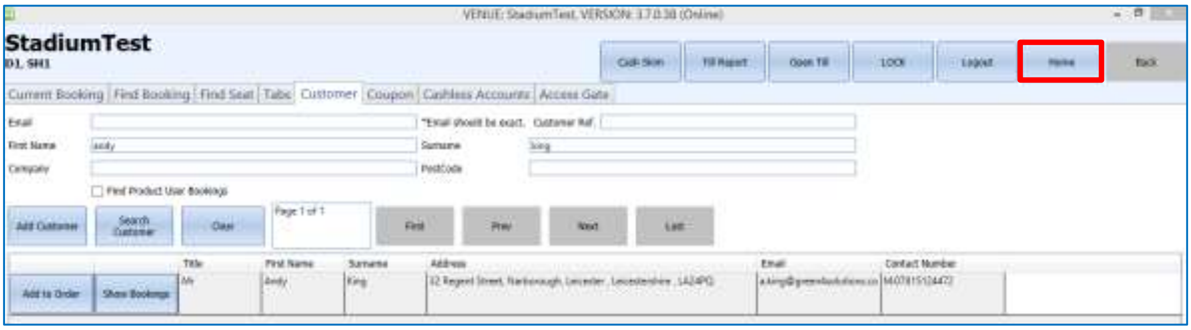
In this instance all Season Ticket holders' seats should have already been reserved so that they cannot be purchased by other customers and are only available for the Season Ticket holder. For more information on how to set up Reservations, see the Green 4 Ticketing Reservations User Guide.

To add a reserved seat to a Season Ticket card, complete the following:

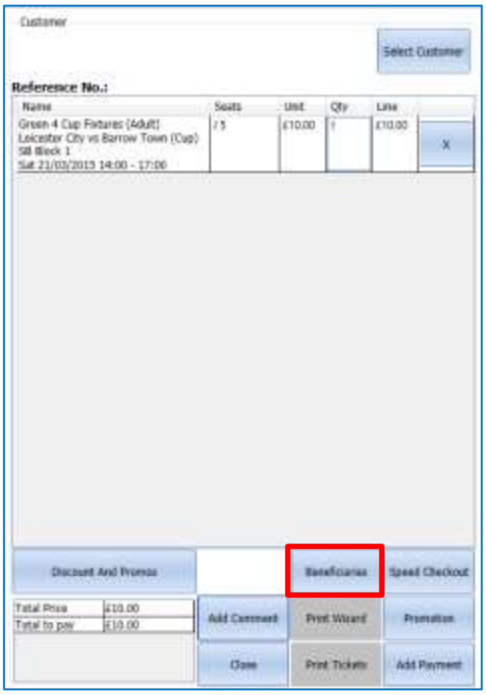
1. In the POS, select the **Customer** tab and search for the relevant Season Ticket Card holder.
2. Double click on their name to open up the **Customer Details** screen
3. Within the Customer Details screen select the **Reserved Seats** tab.
4. Select the **Buy Seats button** next to the reserved seat that is to be purchased, before selecting **Buy Tickets.**



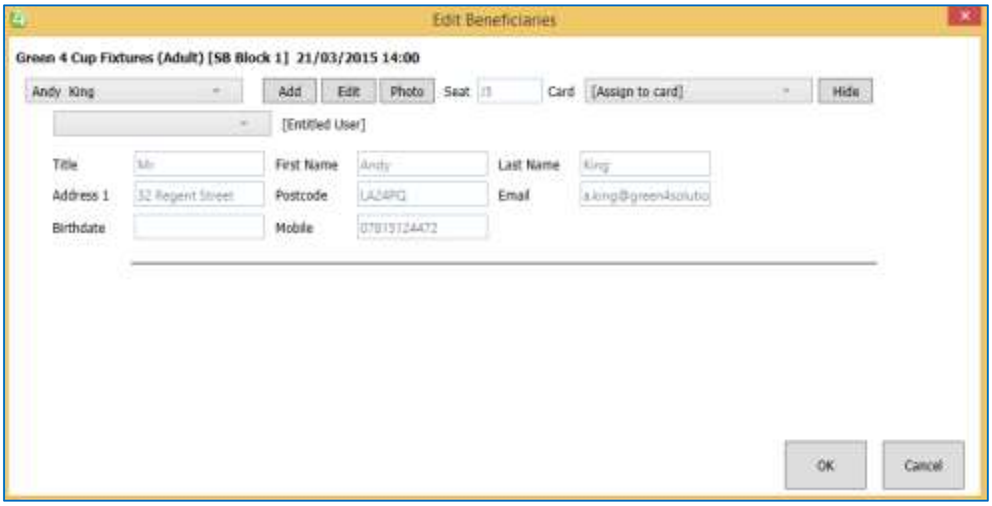
5. A **Select Product Variant** screen will appear, if necessary change the Variant or continue by selecting **OK.**
6. The customer search tab screen will be displayed, select **Home.**



7. The basket will be shown with the reserved fixture ticket added to it. The details of the fixture in the basket will display the same seat details as the customers Season Ticket seat. Select the **Beneficiaries** button.



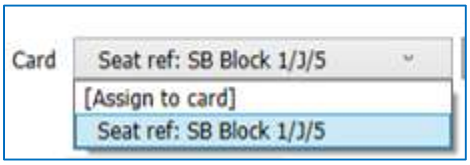
8. The Edit Beneficiaries screen will be displayed.



9. To add the reserved fixture to a Season Ticket card the drop down list entitled **[Assign to Card]** must be completed.

10. From the **[Assign Card]** drop down list, select the Season Ticket card. The Season Ticket card shown will display the same block, row and seat number as that for the selected fixture.

    If the default **[Assign to card]** option is chosen then the fixture will not be assigned to any Season Ticket card.



Note. The seat reference in the **[Assign to card]** drop down list is shown as: Block Name/Row/Seat.

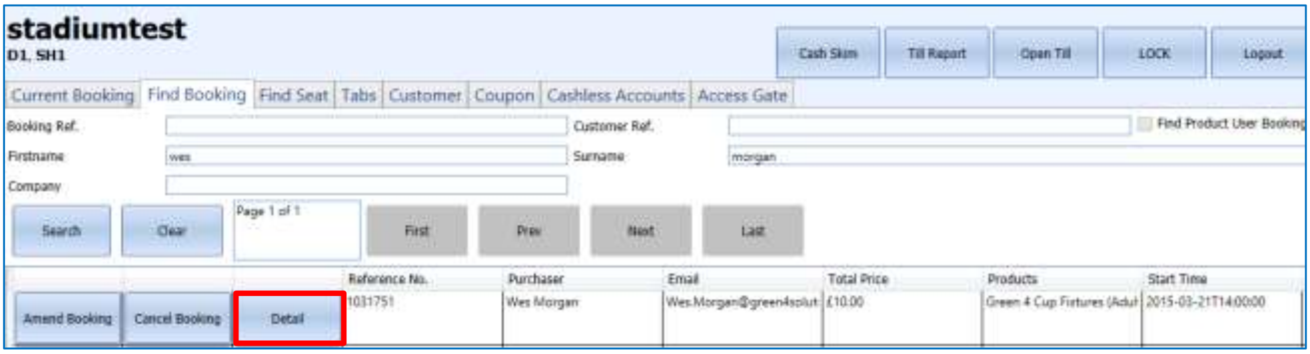
11. Upon assigning a card to the beneficiary, select **Ok** in the Edit Beneficiaries screen.
12. Payment can then be made normally for the fixture by selecting **Add Payment** in the basket.

BOOKING DETAILS

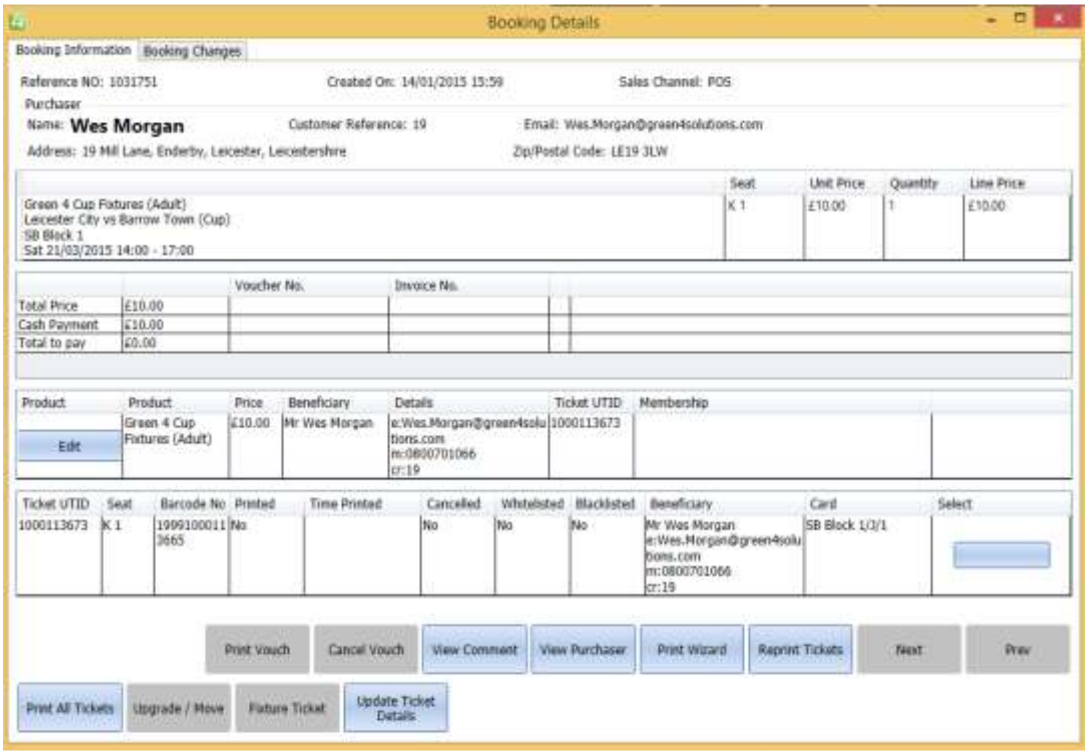
A new column has been included in the **Booking details** screen called **Card** to display if a fixture ticket has been assigned to a card.

To reach the Booking Details screen in the POS complete the following:

1. Select the find booking tab in the POS and enter the bookings information into the fields to find the correct booking.



2. Upon finding the booking, select **Details**, highlighted above.
3. The **Booking Details** screen will be displayed.



4. If a fixture has been assigned to a Card, the bottom table of the Booking Details screen will have the block Name/Row/Seat of the Season Ticket card completed in the Card section of the table, as is shown below. If the Card section of the table is blank, then no fixture has been assigned to the Season Card.

Ticket UTID	Seat	Barcode No	Printed	Time Printed	Cancelled	Whitelisted	Blacklisted	Beneficiary	Card	Select
1000113673	K 1	19991000113665	No		No	No	No	Mr Wes Morgan e:Wes.Morgan@green4solutions.com m:0800701066 cr:19	SB Block 1/J/1	

Note. If a Season Ticket holder has added their usual Season Ticket seat for a fixture to their Season Ticket Card, the Seat section of the table will share the same row and seat numbers as is displayed in the Card section of the table:

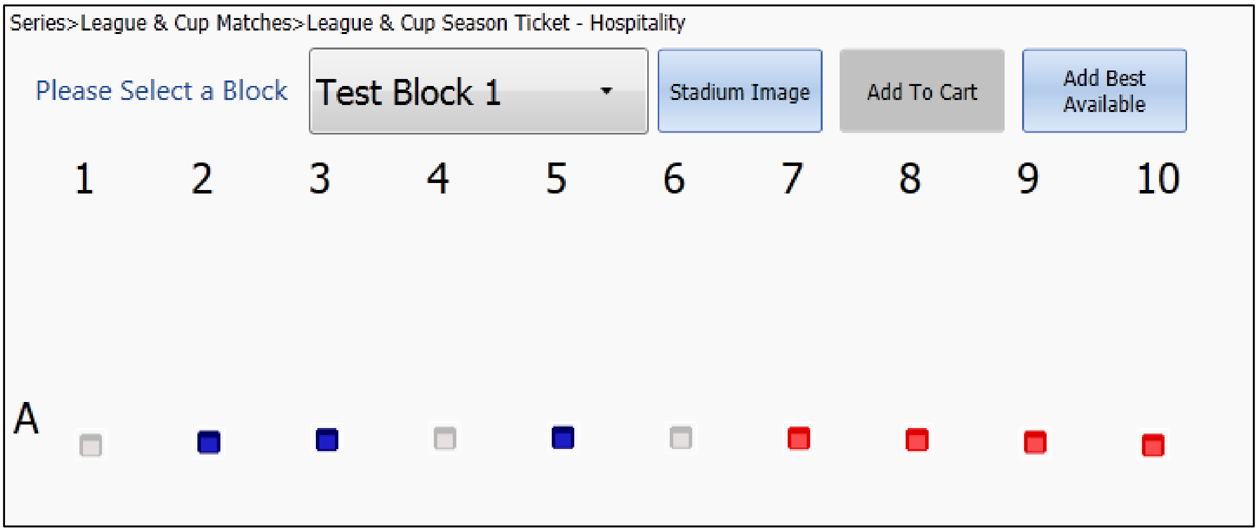
Ticket UTID	Seat	Barcode No	Printed	Time Printed	Cancelled	Whitelisted	Blacklisted	Beneficiary	Card
1000113685	J 5	19991000113679	No		No	No	No	Mr Andy King e:a.king@green4solutions.com m:07815124472 cr:21	SB Block 1/J/5

Access Control- As part of the post-payment processing, (when the tickets are printed), if a fixture ticket has been assigned to a Season Ticket card, then the barcode associated with the Season Ticket card is used for access control purposes for that fixture, instead of the barcode generated for the paper ticket. The customer will only have to present their season ticket at the access control point to gain entry.

If the Season Card has been forgotten on a match day it is possible to print a paper ticket for the fixture that had been added onto the card, the card will then become blacklisted for that fixture.

6.3. PARTIAL SERIES SALES

1. When partial ticket sales have been setup for your installation of Green 4 Ticketing, when you create a booking for a series ticket in POS, when the seat picker is displayed, any seats that are available for some of the series only will be shown in blue:



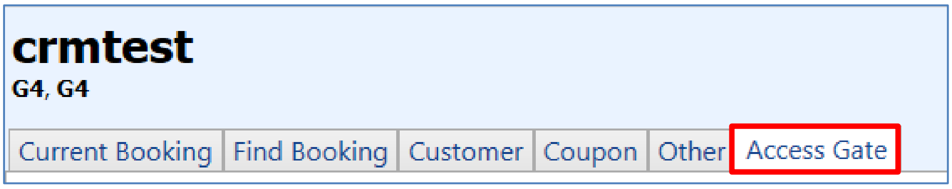
2. When you select a seat that is blue, a dialog will be displayed stating which fixtures the seat is already taken for. Ensure you make a note of the fixtures not covered by the series ticket.

3. Select OK to continue.
4. Once the appropriate number of seats has been selected the **Add to Cart** button will become enabled. Select to continue.
5. In addition to the series ticket, a coupon product will be added to the cart. This can be used to purchase individual tickets for the fixtures not included in the series.

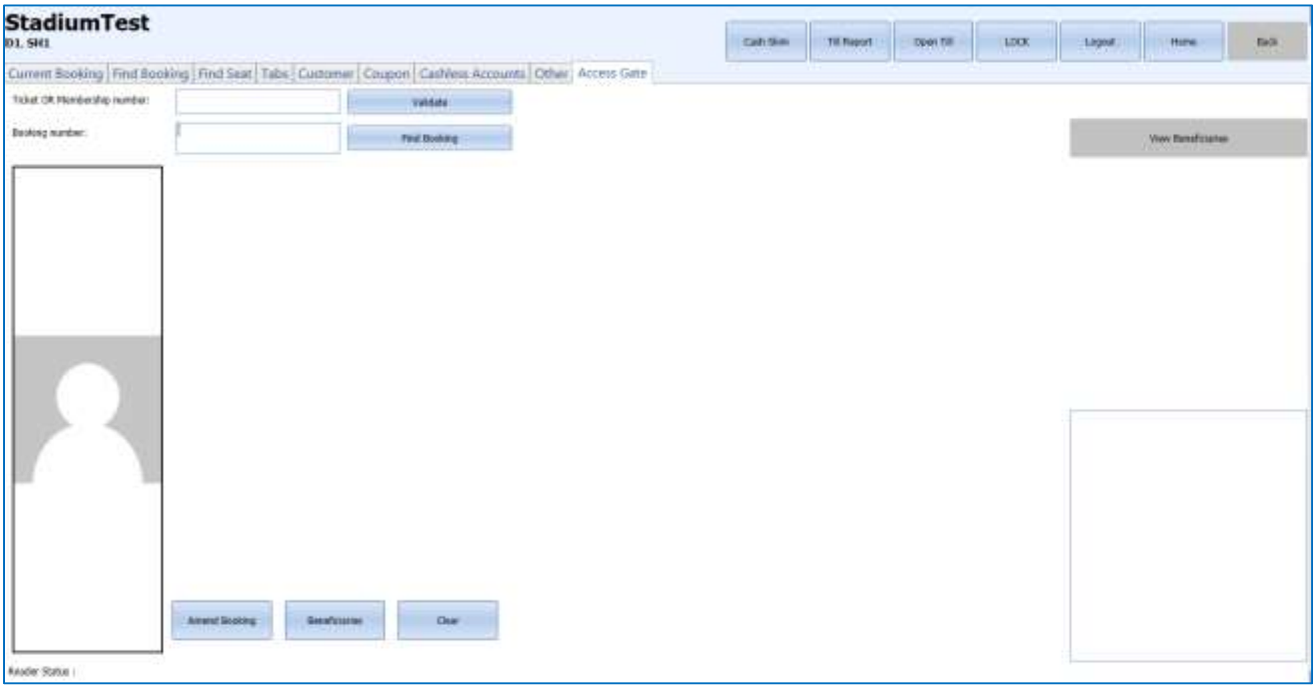
7. USING THE ACCESS GATE ON THE POS

The following section explains how the access gate is used on the POS:

1. Log into the POS before selecting the Access Gate tab.



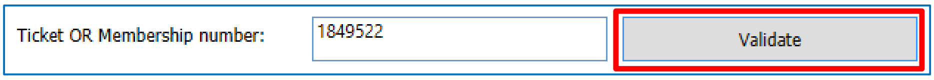
2. The Access Gate display on the POS will be shown:



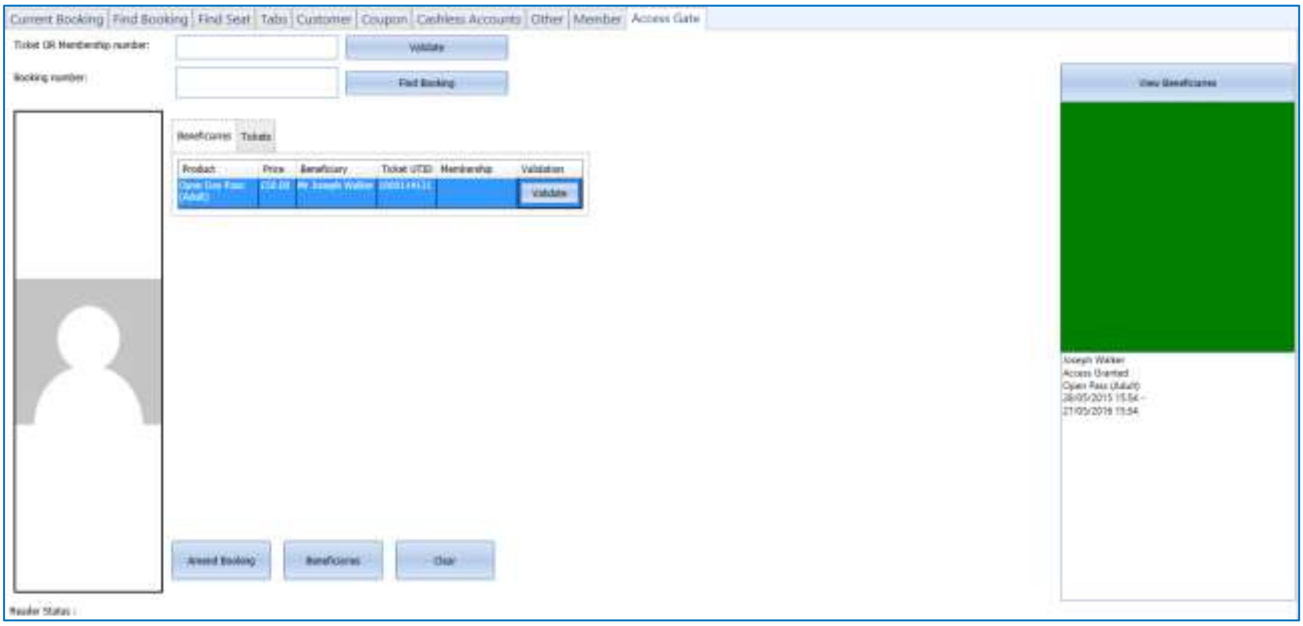
7.1. VALIDATING A TICKET OR MEMBERSHIP NUMBER

1. If the system has the option of scanning tickets or memberships, scan the ticket or membership. The number of this ticket or membership will appear in the **Ticket OR Membership number** area. Alternately, if the system does not have the option to scan, manually enter the Ticket or Membership number into the **Ticket OR Membership Number** Area.

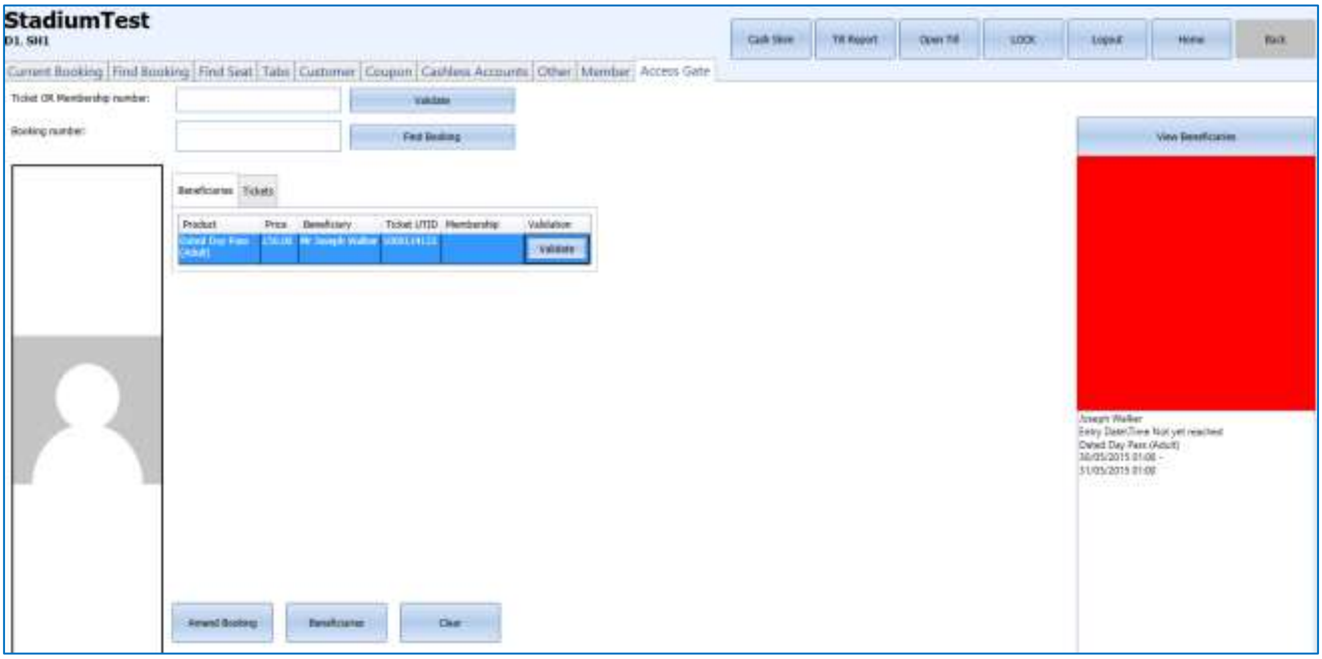
2. To Validate the Ticket or Membership number, select the **Validate** button as shown below.



If the Ticket or Membership number allows access to the venue the POS will display a green flag for 2 seconds.

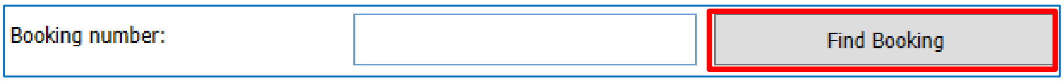


If the Ticket or Membership number is invalid, meaning access is denied, the POS will display a red flag for 2 seconds.

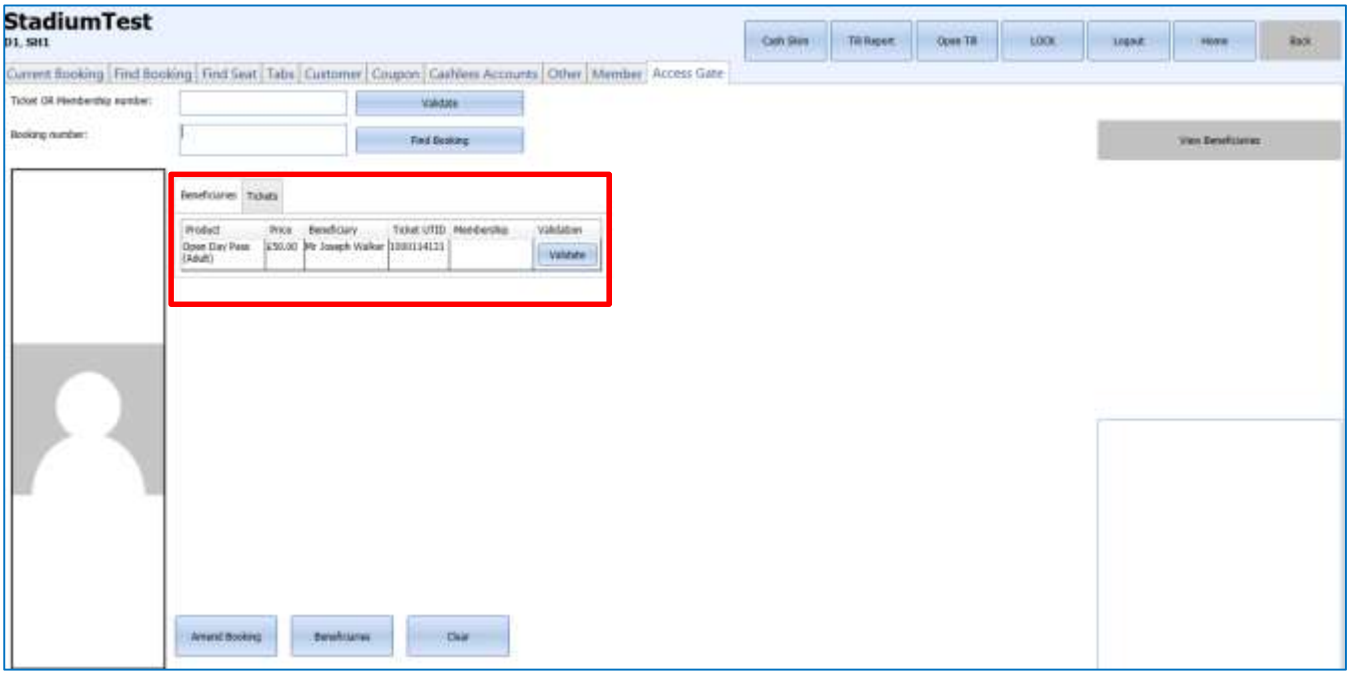


7.2. FINDING A BOOKING TO VALIDATE ON THE ACCESS GATE

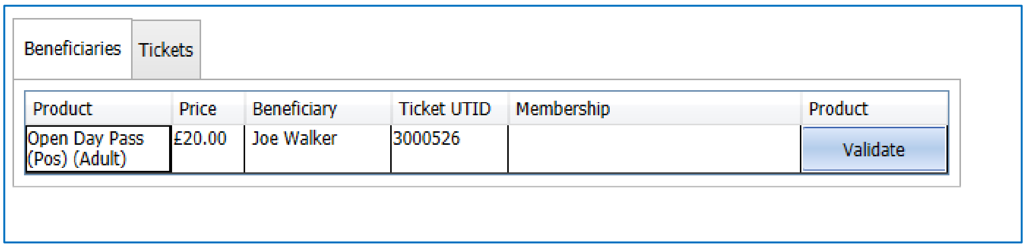
1. If a customer has a booking number, the terminal operator is able to use this booking number by entering it into the **Booking Number** area and selecting **Find Booking** to display the related bookings.

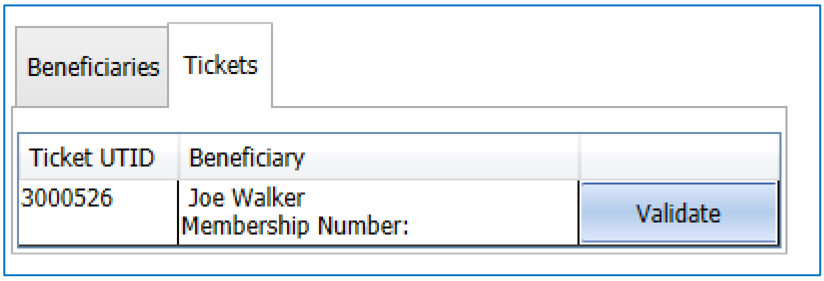


2. If a valid Booking Number has been entered a new table will appear as is displayed below, with two tabs; Beneficiaries and Tickets. The table shows the Product, the Price, the Beneficiary and Ticket UTID related to the booking number whilst a Validate button is displayed on the end of each row. If the product type is a Ticket or Membership, different areas of the table will be completed.

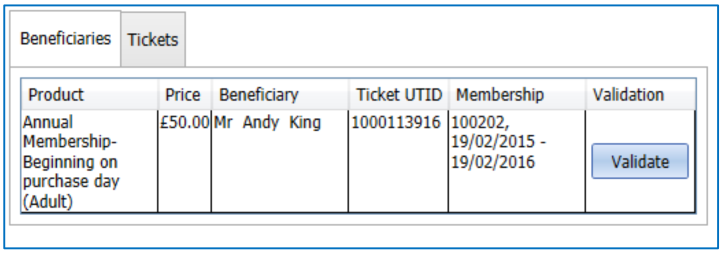


3. For a **Pass or Ticket** type product, the table will remain blank in the Membership area whilst all other fields will be completed as displayed below:





4. For a **Membership** type product, unlike tickets or pass products the Membership field will be completed, showing relevant information such as, the start and end date of the Membership



Product	Price	Beneficiary	Ticket UTID	Membership	Validation
Annual Membership-Beginning on purchase day (Adult)	£50.00	Mr Andy King	1000113916	100202, 19/02/2015 - 19/02/2016	Validate

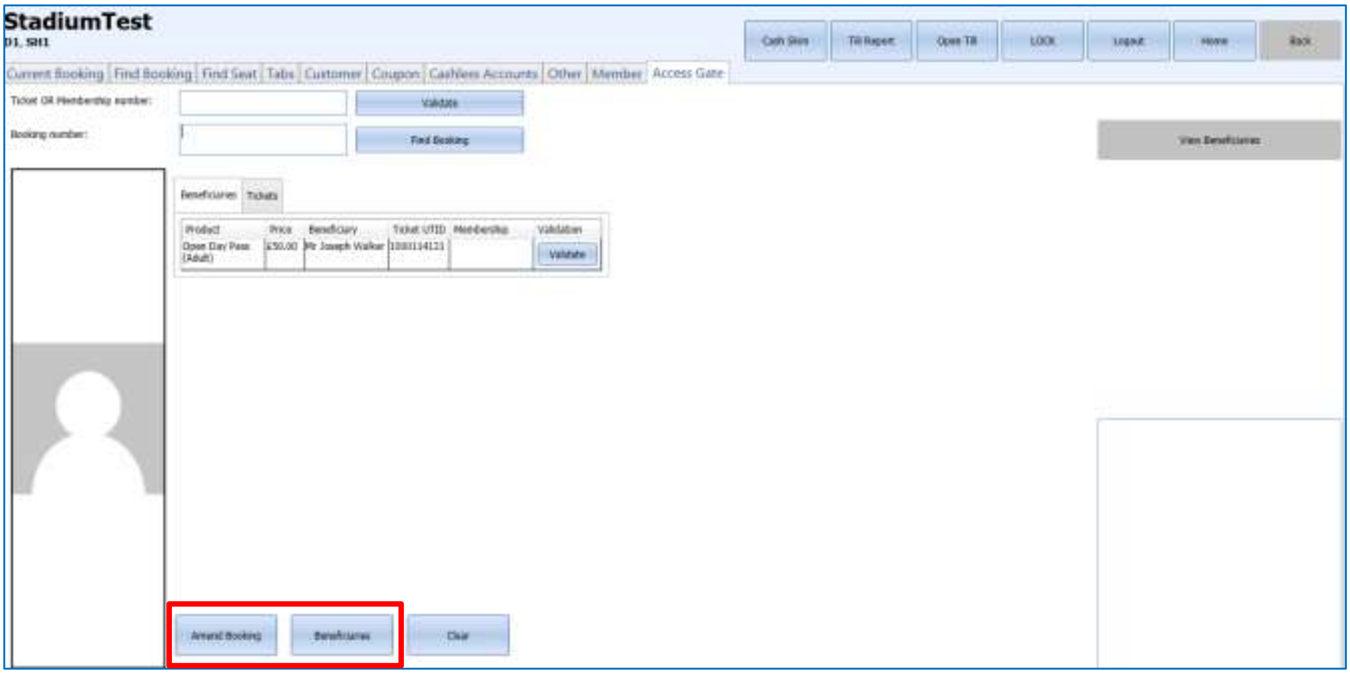
5. The products that are displayed in the table can be validated. To do this, select the **Validate** button that sits at the end of each row. If the validation is successful a green flag will show for 2 seconds, whereas if it is unsuccessful and validation is denied a red flag will be shown for 2 seconds.

6. To clear the booking and product details, select **Clear** at the bottom of the Access Gate page.

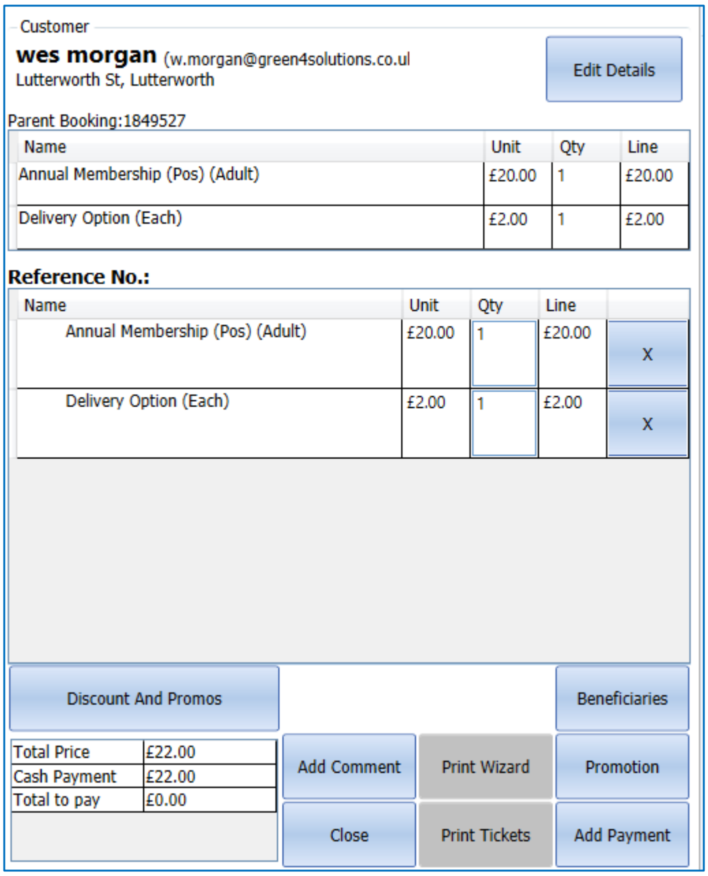
7.3. AMENDING A BOOKING AND EDITING THE BENEFICIARIES IN THE ACCESS GATE

a) If a Booking has been found by using the **Find Booking** option and a table with the product details is displayed it is possible within the access gate to either amend the Booking or display the Beneficiaries information and from here edit the information if need be. **Please note** if no bookings have been searched for, both the Amend Booking and Beneficiaries buttons will be greyed out and cannot be selected.

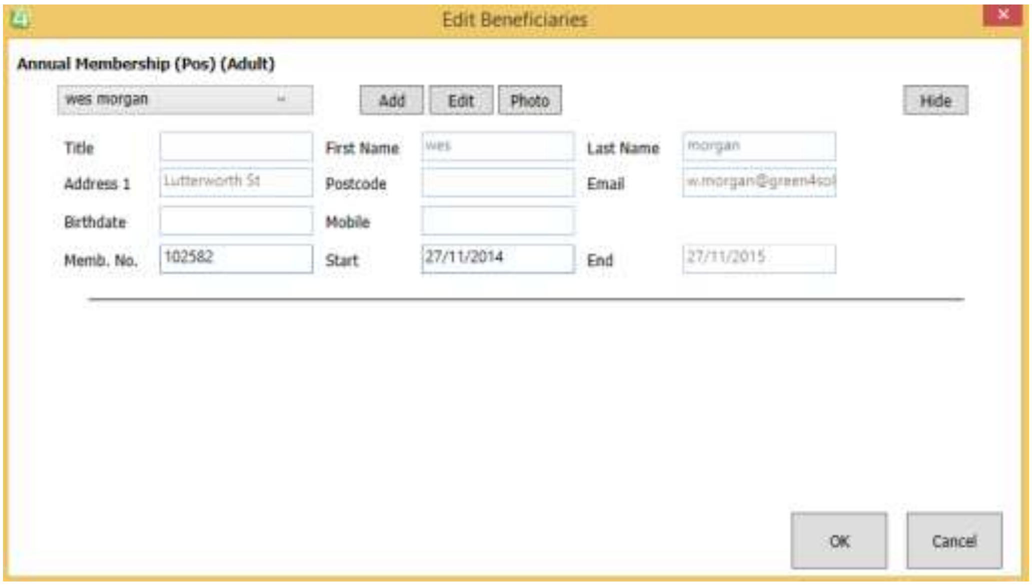
b) The options to amend a booking or display the beneficiaries are placed at the bottom of the Access Gate screen on the POS as highlighted below:



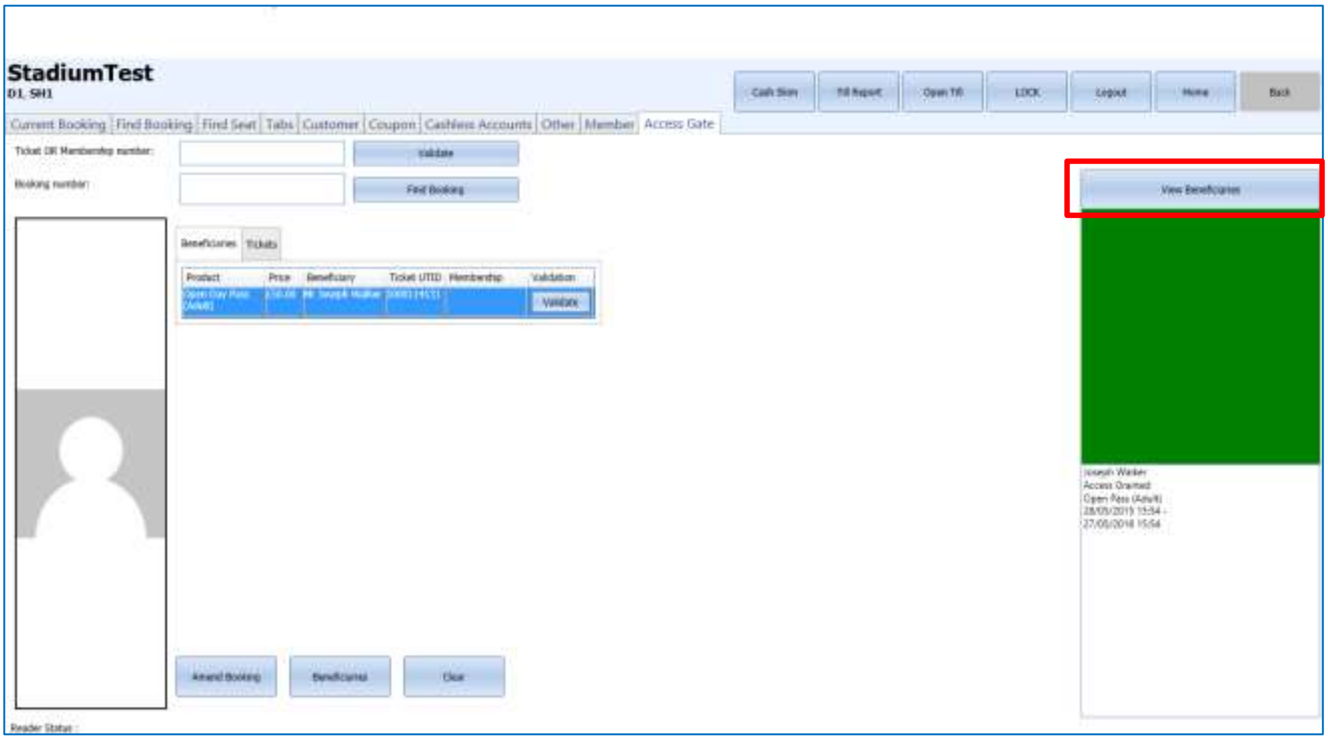
c) To amend the booking that is displayed in the table, select **Amend Booking**. This will then take the booking back to the shopping cart view where the booking can then be amended by the operator.



d) To display the Beneficiaries related to the booking select **Beneficiaries.** This will display the Edit Beneficiaries dialogue. From here it is possible to edit the beneficiary if needs be by selecting the edit button which in return will display the Customer Details form where this can be carried out.



e) An additional View Beneficiaries button is in the top right hand corner of the Access Gate form on the POS. This only becomes selectable after a Booking or Ticket has been validated. By selecting it the Edit Beneficiaries screen will be displayed. This purpose of this is that if a customer's photo does not get displayed in the Access gate to the operator, the operator can then quickly take a photo of the customer within the Edit Beneficiaries window.


StadiumTest
D1, SH1
Current Booking
Find Booking
Find Seat
Tabs
Customer
Coupon
Cashless Accounts
Other
Member
Access Gate

8. MISCELLANEOUS TASKS

In addition to creating and managing ticket bookings, there are a number of additional tasks that can be performed within the Green 4 Ticketing application:

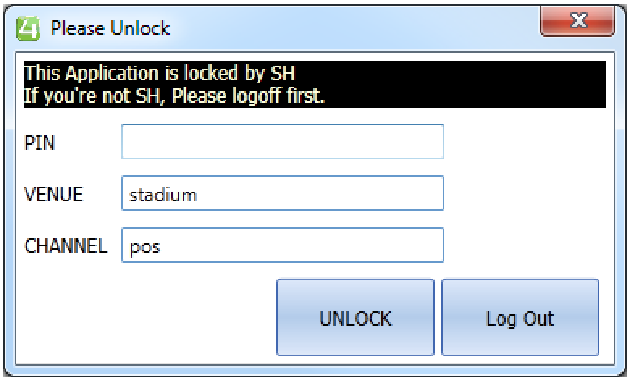
- Lock the terminal
- Log out of the terminal
- Produce a till report
- Open the till
- Record a Cash Skim

8.1. LOCKING THE TERMINAL

When you leave the terminal unattended, you should lock the terminal to prevent other people accessing the information available via the system. When the terminal is locked, any bookings that have not been completed will remain open ready for you to complete once you return.

To lock the terminal:

1. Select **Lock** on the Menu.
2. The Log In screen, stating that the terminal has been locked, will be displayed:



3. To restart using the terminal, enter your **PIN** and select **UNLOCK**. If a different user attempts to log into the terminal, they will be informed that the terminal is in use by a different operator. If they wish to continue using the terminal they will have to exit the Green 4 Ticketing application, before restarting and logging in (see Logging In for details).
4. To close Green 4 Ticketing, select **Log Out**. If a booking is in progress the Close Booking message will be displayed:

5. Select **Confirm** to close the application and lose the current booking details. Select **Cancel** to abort the exit attempt.

8.2. LOGGING OUT

To log out of the terminal:

1. Select **Log Out** on the Menu.

2. If a booking is in progress the Close Booking message will be displayed:

3. Select **Confirm** to continue logging out and lose the booking details. Select **Cancel** to abort the log out attempt.

8.3. PRODUCING A TILL REPORT

To print out a report of till activity for the current shift:

1. Select **Till Report** on the Menu.

2. The report will be printed on the attached printer.

8.4. OPENING THE TILL

To open the till (when not taking payment):

1. Select **Open Till** on the Menu.

2. You may be asked to enter your PIN as authentication. Enter your details before selecting **OK**.

3. The till connected to the terminal will open immediately.

Note: The open till option will only be available if a till is integrated with the terminal.

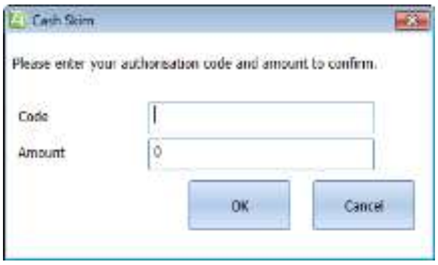
8.5. RECORD A CASH SKIM

In order to reduce the security risk of holding large amounts of money in the EPOS till, the latest version of Green 4 Ticketing has a "cash skim" option, which allows a user to record the removal of money from the till. The recording of a cash removal using the Cash Skim option will result in an audit record being generated in the CRM database.

To record the removal of cash from the till:

1. Select **Cash Skim** on the Menu.

2. The Cash Skim dialog will be displayed:

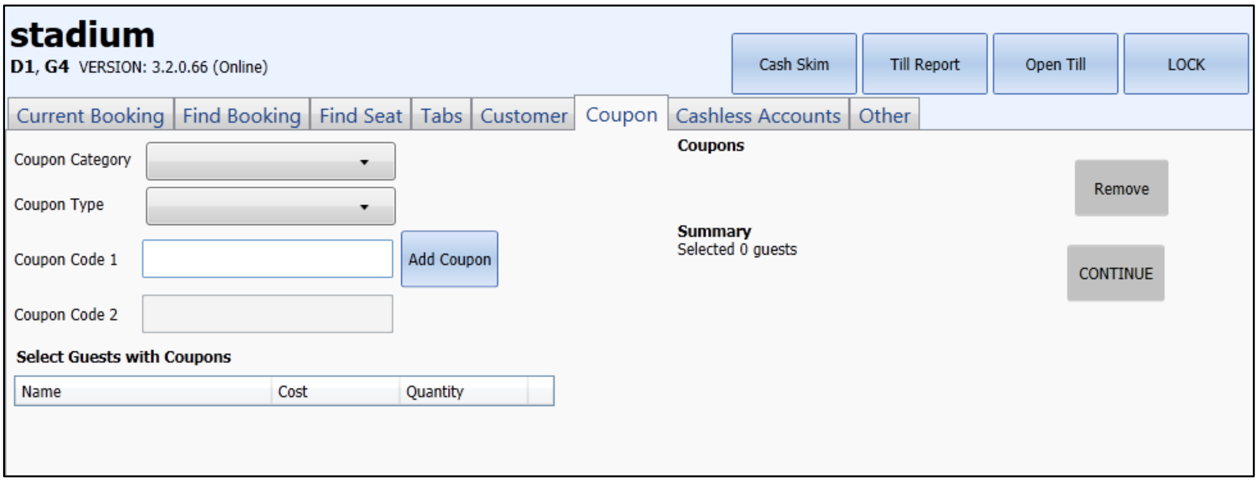


3. Enter the following details:
    - **Code.** Enter you pin.
    - **Amount.** Enter the amount of money you are removing from the till.
4. Select **OK** to continue.

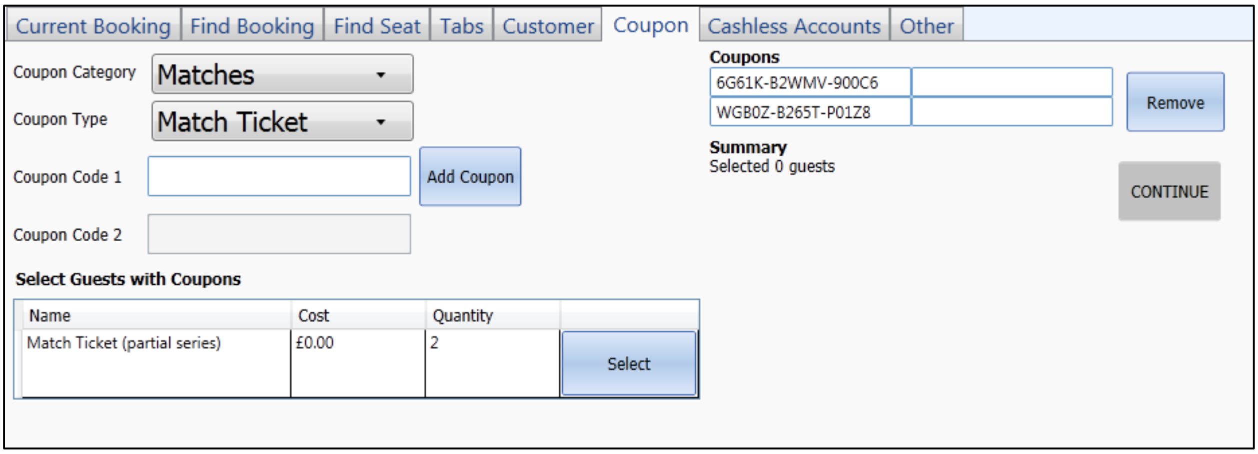
8.6. COUPONS

Coupons may be issued either by your organisation or by a third-party, e.g. Groupon. Coupons can be exchanged for pre-defined products only and have no monetary value. To exchange a coupon:

1. Select the **Coupon** tab heading.
2. The Coupon page will be displayed:



3. Complete the following details using the information provided with the coupon:
    - **Coupon Category.** Select the coupon category from the drop-down list.
    - **Coupon Type.** Select the coupon type from the drop-down list.
    - **Coupon Code.** Enter the first coupon code.
    - **Coupon Code 2.** Enter the second coupon code (if applicable).
4. Once the details are complete, select **Add Coupon**.
5. Repeat the above process for all the coupons held by the customer.
6. The Coupon page will update to display details of the coupons entered:



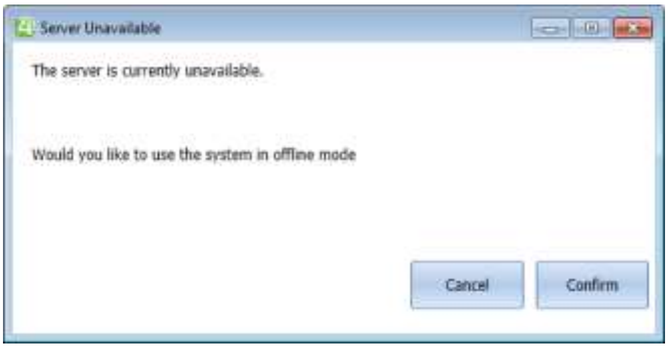
7. Select **Remove** to remove any coupons that have been added in error. The Remove Coupons dialog will be displayed allowing you to select which coupons to remove.
8. Click **Select** alongside the product the customer wishes to purchase using the coupons.
9. The Additional Guests area will be displayed. Enter the number of paying guests to include on the booking (there is no need to add the guests paying using a coupon).
10. Once the guest number is correct, select **Continue**.
11. You will be guided through the standard product purchasing process.

9. OFFLINE WORKING

Offline working allows you to continue to take bookings when your internet connection temporarily fails. The functionality available when offline is limited to designated products and payment methods. In addition promotions cannot be applied to bookings made whilst offline.

9.1. SWITCHING TO OFFLINE MODE

1. When your Internet connection fails, an error message stating that the server is unavailable will be displayed.
2. Select **OK** to continue.
3. Exit EPOS, confirming the loss of any open bookings if necessary.
4. Restart EPOS.
5. The Server Unavailable dialog will be displayed. Select **Confirm** to continue using EPOS in the offline mode. If you select **Cancel**, EPOS will fail to open.



6. The Please Login dialog will be displayed. Enter you **pin** and select **Login**.
7. The Booking screen will be displayed allowing you to continue taking bookings for products that have been set to be available offline.
8. When you take a booking in the offline mode, you will be unable to add a customer to the booking and will only be able to use selected payment methods, for example Cash.

9.2. SWITCHING TO ONLINE MODE

When your internet connection is restored EPOS will continue to function in offline mode until you exit the application. To switch back to the online mode:

1. In EPOS select **Logout**.
2. The Please Login Screen will be displayed. Select **Exit**.
3. Restart EPOS.
4. The Server Available dialog will be displayed. Select Confirm to start using EPOS in the online mode. If you select Cancel, EPOS will continue to operate in the offline mode.

5. There may be a short delay before the Please Login dialog is displayed. The delay is the result of the offline bookings being transferred to the online database. Once the transfer is complete an information message stating the success of the transfer will be displayed. Select **OK** to continue.
6. The Please Login dialog will be displayed. Enter your pin and select **Login** to continue.

END OF DOCUMENT