

# CRM DRIVEN SOLUTIONS FOR SPORT & LEISURE

# GREEN 4 TICKETING BOOKING AND PRODUCT MANAGEMENT 3.7.









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# **ABOUT THIS DOCUMENT**

This document has been prepared as a User Guide for Ticketing Booking and Product Management.

## **NON-DISCLOSURE**

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## **DOCUMENT CONTROL**

Version	Date	Change	Initials
V1.00	12/11/14	This is a new document	JW
V1.1	14/11/14	Capturing a Membership Photo step added as well as Cross JN Sell products Header and Sub Header	
V1.2	08/01/14	Setting up Season Ticket Buy-Back functionality in CRM	WL
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V1.4	19/01/15	Adding Fixtures to Season Ticket cards	WL
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V1.6	02/02/15	Setting up Pass type products and Pass and Membership Settings Scenarios	JW



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# **1. INTRODUCTION**

This user guide provides information on how to manage bookings in the Green 4 Ticketing Solution and how to set up products for sale. The set-up of the different product types is described.

This document covers the following:

Booking Management	- - -	Finding a booking Analysing a booking Using Advanced Find Saving Advanced Find Results
Product Management	- - -	Setting up Variant Types and Variant Price Lists Setting up Bookable Products of different types Using Sales Plans with Channel Prices Lists to put products on sale

Other user guides available include:

- Customer Management
- Infrastructure Set Up User Guide
- Venue Management User Guide
- Ticketing Reservations User Guide
- Delivery Options, Delivery Charges, Additional Charges
- Promotions, Coupons and Vouchers User Guide
- Gift Aid and Donations User Guide
- Retail User Guide
- Reporting using The Data Cube
- ECommunications

# 2. BOOKING MANAGEMENT

# 2.1. FINDING A BOOKING

When a ticket is sold or a booking made via the ticketing website or POS, a new booking record is created within CRM. To view a list of bookings within CRM carry out the following:

Bookings 🖾 🙀 -	Bookings Active	Bookings *	
Bookings	Booking Referen_	Total Price	Booking Status
Booking Products	1000155	£23.50	Active
	1000156	£37.00	Active
	1000157	£23.50	Active
	1000158	£18.50	Active
1	1000159	£18.50	Active
	1000160	£37.00	Active
	1000161	£37.00	Active
	1000162	£86.50	Active
Workplace	1000163	£94.00	Active
Sales	1000164-1	£37.00	Active
Manhatian	1000165	£37.00	Active
Marketing	1000166	£55.50	Active
Loyalty	1000167	£17,50	Active
Bookings	1000168	£50.00	Active

a) In CRM, select **Bookings** from the **Bookings** tab in the navigation area.

b) A list of active bookings will be displayed. To search for a particular booking enter the booking reference in the search box at the top of the view and click the search icon:

ookings Active	Bookings •					Search for records	
Booking Referen	Total Price	Booking Status	Parent Booking	Booking Referen	Channe	H Unrefunded Val	Refund V: 3
1000000	£37.00	Active			POS	£0.00	
1000001	£37.00	Active			POS	£0.00	^

- c) The list of bookings will be revised to show bookings that match on the booking reference only. Other search criteria that can be used here are Contact Name.
- d) To open a booking, click over the booking reference.
- e) The booking will be displayed in the form view.

To view bookings linked to a contact:

a) In CRM, select **Contacts** from the **Marketing** tab in the navigation panel.



Marketing 🛛 🚮 🙀 -		Contacts My Active Contacts -
Ceads	~	Full Name 🔺
😥 Contacts		Abbas Khan
Marketing Lists	1	Abigail Rollinson
Products	[	Adam McCarthy
Sales Literature	[	Adam Stinton
🤯 Quick Campaigns	[	Adi Clark
Se Communications		Adrian Stukins
Communication Audiences		Adrian Turnock
Workplace	~	Adriana Kavurova
Sales		Adriana Kavurova
2010-20	[	Aedan Ryan
Marketing		Aidan Collins

b) Search for the relevant contact using the search box at the top of the view.



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

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

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

Add New Add Existing Edit	Iomize Bookings Activate Sulk Dele Deactivate Delete Booking rds	ete 🚰 Mail Merge 📆 Co 😪 E-r Collaborate
Information  Contact Details Other Details Overall Summary	Contact Michael Clark	
Booking Summary     Tricket Summary     Hospitality Summary     Merchandise Summary     Communication Summary     Conduct Preferences     Administration     Notes     Conflicts Tab      Related	Booking Refere Tr     A 1022160     A 1019002     A 1018010     A 1018010     A 1000091	otal Price Delivery Fu (202.00 (30.00 (44.00 (58.50
Recurring Members Login Audits Loyalty Redemptions Loyalty Accounts Bookings Cramers		

- g) To view the details of a booking, click over the booking reference number.
- h) The details of the booking will be displayed in the form view.

# 2.2. BOOKING FORM

#### **SUMMARY**

The summary area displays basic information relating to the booking for example the booking reference, total price, purchaser and channel. If a comment has been added to the booking this will be shown also.

If the Green 4 Retail module is in use, the Retail Order Status field is used for tracking the status of merchandise that needs to be picked and dispatched.

General			
Summary			
Booking Reference	Imported 5604 ×	Order Type	
Total Price	£413.62	Purchaser	Mark Allen
Channel	DOS 🖸	No Purchaser Reason	<b>`</b>
Comment	VM Price class: EB 2 Adult 1 Child		
RetailOrderStatus	Shipped		

#### DISCOUNT

The Discount area will display the details of any promotions that have been applied to the booking. The example below illustrates the information that may be displayed. Note: Discounts in the system are set up as payment methods.



Discount			
Discount Value	£ 20.00	Discount Reason	Promotion:halfprice
Discount Code	halfprice	Promotion	half price tickets vs Monaco

#### PAYMENT

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

Payment			
Payment Method	Q	Card Details	
Refund Value	£ 32.68	Unrefunded Value	£ 0.00
Invoice Number		Emailed Operator	● No O Yes
Emailed Purchaser	● No ○ Yes	Fulfilment Status	×

#### **DELIVERY ADDRESS**

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

Delivery Address			
Label	Home	City	Leicester
Line 1	Main Street	County	Leicestershire
Line 2		Postcode	LE11AA
Line 3		Country	
Delivery Fulfilment Status	<b>~</b>		
Dispatch batch			

#### **TICKET COLLECTION**

The ticket collection method field can be used to record the details of how the tickets are to be collected if this is set up.

Ticket Collection	
Ticket Collection Method	✓

#### **OPERATION**

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



<ul> <li>Operation</li> </ul>					
Booking Operator	Цф <u>SH</u>	Q	Ticket Printed	🔿 No 💿 Yes	
Till	52		Booking Terminal	<u>à 52</u>	Q
Media Code			Transaction Code		
Booking Number			Loyalty Processed	O No O Yes	
Vouchers Collected	○ No ○ Yes				

#### **LINKED BOOKINGS**

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

Linked Bookings				
Next Booking	arder 25/02/2011 12:20:14	Q	Previous Booking	
Renewed Booking		Q	N	
			A.	

Within Green 4 Ticketing, when a booking is edited a booking thread is created to handle the transfer of payment and products from the original booking to the revised booking. For example in the screenshot below, the initial booking 1000534 has been revised. The new booking has the reference 1000534-1. The booking with the reference 1000534-R is the reversal of the original booking.

0.5	Tints ing Refere.	finolding 2shut	Total Price
6.0	1000534	Inetthe	\$47.50
11.0	1000534-1	Attive	447.00
n à	1000554-6	Inactive	-247.00

### **2.3. RELATED ITEMS**

Related to the booking are a number of additional entities that are relevant, these will give you additional information relating to the booking made:

- **Booking Payments.** The Booking Payments area will list individual payment methods used to complete the booking. To view the details of the payment, click on the payment name.
- **Booking Products.** The Booking Products area will displayed details of the products bought. Via the booking product you will be able to navigate to the actual Bookable Product and variant purchased. The booking product record will display the actual price paid for the product.
- **Booking Tickets.** The Booking Tickets area will display details of the tickets that have been generated for the booking. The booking tickets area will record information such as whether the ticket has been printed, cancelled, whitelisted or blacklisted (for access control).
- Seat Allocations. The Seat Allocations will list the seats allocated to the booking. The information will include the block, row and seat that hast been allocated to the individual. This will reflect the seat picked during the sales process. It is possible to display the Product User under Seat Allocations in the Booking Form. To do this:
  - a) Select **Seat Allocations** in the Booking forms navigation area.
  - b) A list of the Seat Allocation bookings will be displayed. Place a tick in the relevant booking and double click on the booking to open it.

- c) The Seat Allocation form will be displayed. In the navigation area select Product Users.
- d) This will display the Product Users related to the booking. To open the Product Users details, tick the box next to the name of the user before double clicking on the name, a Product User form will then be displayed.

UT

1 0

# 2.4. ADVANCED FIND

Understanding the underlying data structure in CRM, allows you to effectively search for data in the database using the Advanced Find functionality. Using the advanced find you can search for records based on data included in one or more fields on the record. You can also base the search on information held in related records. For example you can search for Bookings for a given fixture with seats in a selected block. The following example will illustrate how to build the example described.

- a) In CRM, select Advanced Find on the ribbon.
- b) The Advanced Find view will be displayed.
- c) Select the Details menu option
- d) At the top of the dialog select the following:
  - Look For. Select Bookings from the drop-down list.
  - Use Saved View. Select Active Bookings from the drop-down list.

File Advanced Find	]			STADIUM 🔺
Query Saved Results Show	New Save As Save Edit Columns Fedit Propertie	Clear (E Group AND) (E Group OR Details Query	Download Fetch XML Debug	
Look for: Bookings			Active Bookings	×
	Equals	Active		
Booking Status	Equals	Active		
Select				

- e) The Advanced Find dialog will be updated as shown above. The search parameters linked to the view will be automatically added; in this instance two parameters are automatically listed Status = Active and Booking Status = Active.
- f) To add additional parameters, click Select (highlighted in the above) image.
- g) A list of fields on which you can search will be displayed. The list is divided into two sections:
  - **Fields.** The top section of the list lists fields that are part of the record type you are currently searching on. For instance in this example, we can see all the fields that form part of the booking record:

ook for:	Bookings	~	Use
8 8 8 8 8 8 8 8 8 8 8 8 8 8 8 8 8 8 8	els uthonization Code boking Number boking Deviator boking Status boking Status boking Status boking Status boking Terminal el Détails tannel ty priment pomment pomment party party butty party	Activ	2

• **Related.** The bottom section of the list lists all of the entities that are related to the current record type. So in this example we see a list of all record types that are related to booking, including booking payments, booking products, seat allocation, etc.

		Active
Related		
Activities (Regarding)	^	Active
Appointments (Regarding)		10000
Booking Charges (Booking)		
Booking Operator		
Booking Payments (Booking)		
Booking Products (Booking)		
Booking Question Answer (Booking)		
Booking System Messages (Booking)		
Booking Terminal		
Booking Ticket Copy Data (New Booking)		
Booking Tickets (Booking)		

To use a **field** from the list:

h) Select the appropriate field name from the list. A new row will be added to the advanced find as shown below:

Lo	ook for: Bookings		V Use Saved View:
		Equals	Active
	★ Booking Status	Equals	Active
	✓ Channel	✓ Equals	Enter Value
	<u>Select</u>		

i) Complete the search term using the boxes provided.

Look for: Bookings		V Use Saved View:
	Equals	Active
	Equals	Active
	Equals	👌 <u>WEB</u>
Select		

j) To view the results of your search, click **Results** on the ribbon. A list of records meeting the conditions entered will be displayed.





**Note.** By default the search terms entered will be combined in an AND statement. Therefore in the example we have used above we will look for bookings where the status is active AND the booking status is active AND the channel is web. I.e. to display in the results, a record must match on all three search terms.

To combine search terms in an OR statement (i.e. show me records that match on search term 1 OR search term 2), select the arrowhead to the side of the rows that are to be joined in the OR statement and select **Select Row** from the list of options. Once all rows are selected click **Group Or** on the ribbon.

File	Advanced Find	List Tools Bookings				Microsoft
New Booking	Edit	ate	g Mail N	lerge	Copy a Link	© Run Workflow
	Records			Colla	borate	Proce
	Booking Referen	Total Pric	e	Book	ting Status   Pa	rent Booking
	1029701		£28.00	Activ	e	
	1029685		£36.00	Activ	e	
	1029682		£20.00	Activ	e	
	1029681		£20.00	Activ	e	
	1029680		£32.00	Activ	e	
	1029679		£44.00	Activ	e	
	1029678		£20.00	Activ	e	
E A	1029677		£36.00	Activ	e	

k) To return to the search terms, select the **Advanced Find** tab heading (highlighted above). The search terms previously entered will be redisplayed allowing you to modify the details.

#### To use a **related field** from the list:

I) Select the appropriate record type from the related section of the list. A new row will be added to the advanced find as shown below:

Look for:	Bookings		~	Use Saved View:	Active Boo
	itus	Equals	Acti	ve	
▼ Bo	oking Status	Equals	Acti	ve	
• Ch	annel	Equals	WEB		
			~		
- ≤	at Allocations (Book	ina)			
	Select				

- m) The new row will be coloured blue to indicate it is a related record type. You will not be able to set any parameters on this row.
- n) To set a search term based on the related entity, click **Select** below the blue related row (highlighted above).
- o) A list of fields will be displayed. As before the list will be divided into two sections:
  - a. **Fields.** The fields section will list all of the fields from the related record, e.g. fields on the Seat Allocation record in the example above.
  - b. **Related.** The related section will list all of the record types that are related to the current record type, i.e. all record types that are linked to seat allocation in the example above.



p) Select the appropriate field or related item from the list. A new row will be added to the advanced find dialog.
 Complete the details as required. For example:

look for	Bookings		Use Saved View: Active Bookings
+ <u>s</u> t	atus	Equals	Active
• <u>B</u>	ooking Status	Equal	Active
• 0	iannel	Equals	WEB
- 2	tet		
• 9	Allocations (Book)	ingj	
	Block	Equals	4. East Stand Centre Left 64-9
	Exture	Equais	NTEC vs Manstel (C IZ)
	Select		

q) To view the results of your search, click **Results** on the ribbon. A list of records meeting the conditions entered will be displayed.

### 2.5. EXAMPLES OF AN ADVANCED FIND



**Note.** The examples shown below are all dependant on how the setup of the system has been completed and therefore may differ between setups.

The below Advanced Fine examples demonstrates how it is possible to set up an Advanced Find to show the contact information for all Active **Season Ticket Holders**.

File Advanced Find										
Query Saved Results Show	New Save As Save As Edit Columns Edit Properties View	(들 Group AND Clear Query	Download Fetch XML Debug							
Look for: Seat Allocatio	Look for: Seat Allocations Use Saved View: [new]									
	Equals	2014/15 SEASON								
	<u>Equals</u>	2014/15 SEASON								
	Equals	2014/15 SEASON								
Select		2014/15 SEASON Active;Reserved								
Select Booking										



File Advanced Find Query Saved Results Show	New Save Save As	Clear	Download Fetch XML Debug
Look for: Contacts		▼ Use Saved View: S	eason tickets 2013
Select			
- Bookings (Contact)			
	Equals	Active	
Select			
- Booking Produ	cts (Booking)		
Select			
	iant		
Select	A.		
- Bookab	le Product		
▼ <u>Туре</u>	Equals	Series	
	<u>es</u> <u>Equals</u>	2013 Hor	me Season
Sele	<u>.d</u>		

The following Advanced Find example demonstrates how it is possible to set up an Advanced Find result to show the **Number** of Season Ticket holders in each block.

		Le com con		2007 - DOI 10		1	
Looi	t for:	Seat Allocations			~	Use Saved View:	Number of season ticket holders in each block
	Sele	<u>tza</u>					
•	- <u>Ser</u>	<u>ies</u>					
	•	Series	Equals	League 2013-2014			
_		Select					
ŀ	<u>Boo</u>	aking					
	•	Booking Status	Equals	ActiveReserved			
		Select					
	•	Booking Products (Booking)					
		Select					
		<ul> <li>Product Variant</li> </ul>					
		<u>Select</u>					
		<ul> <li>Bookable Product</li> </ul>					
		▼ <u>Type</u>	Equals	Series			
		Select					
		2494CI					

The following Advanced Find example demonstrates how it is possible to set up an Advanced Find result to show the **Number** of seat moves into a particular block for a certain fixture.

Loo	k for:	Seat /	Viocations				~	Use Saved View	Number of seat moves into Block X for Fixture X
	• <u>Or</u>	iginal S	eat Allocation	Contains Data					
	- Fixture Equals		Bristol	City v Crewe Alexan					
	• <u>Bk</u>	<u>ock</u>		Equals	WEDLO	CK STAND;WEDLOC_			
	Select								
	• 80	oking							
	•	Bookir	ng Status						
	Select								
	-	<u>Booki</u>	na Products (Boo	(king)					
		54	lect						
			oduct Variant						
			Select						
		-	Bookable Prod	uct					
			■ IVDE		Equals	Fixture			
			Select						

## **2.6. SAVING ADVANCED FIND RESULTS**

Once you have created an advanced find you can save the criteria for future use. For example if you create an advanced find to identify bookings for a particular fixture, you can save the search details, and then when you need to report on the next fixture, you can re-use the search once you have adjusted the fixture name.

To save an advanced find:

- a) With the search terms visible in the advanced find dialog, select **Save As** on the ribbon.
- b) Enter a name and description for the search. For example Bookings for Fixture x. Once the details are complete select **OK** to continue.
- c) The view will be listed on the Used Saved View drop-down list as shown below in Advanced Find:

C-Decails	A WITE	1
Query	[new]	
	System Views	1
Use Saved View:	Active Bookings	l
	Inactive Bookings	
ve	My Views	
	Bookings for Fixture X	
ve		l

d) The view will also be available when viewing lists of data outside of the Advanced Find dialog. For example:



Bookings 🕼 📮 -	Bookings:	Active Bookings *
à Bookings	Book	System Views
Booking Products	10297	Active Bookings
	10297	Inactive Bookings
	10291	My Views
	10291	
	10297	
	10297	
	10297	11 £27.00 Active
	10297	10 £20.00 Active
Workplace	10297	09 £36.00 Active
Corporate Sales	10297	08 £40.00 Active
Corporate Sales	10297	07 £8.00 Active
S Marketing & eComms	10297	06 E20.00 Active
Loyalty	10297	05 £19.00 Active
	10297	04 £10.00 Active
Green 4 Integrations	10297	03 £108.00 Active
Bookings	10297	02 £16.00 Active

# 2.7. HOW TO SHARE THE VIEW

Once saving your advanced find results it is possible to share them with selected users. To do this:

- a) Select Advanced Find in the ribbon. The Advanced Find form will be displayed.
- b) Select Saved Views, highlighted below, on the ribbon.

Look for: Bookable Prot	×	Use Saved View:	Active Bookable Products	
show		Query	Debug	
Guery Saved Results	Save As Edit Columns Edit Properties	2 (Sill Group AND (Sill Group OR Clear Status	Download Fetch XML	

- c) A list of your previously saved Advanced Find results will be displayed.
- d) Select the saved view that you would like to share by placing a tick in the in the box placed next to it before selecting **Share** in the ribbon.

File Advanced Fin	List Tools		Microsoft D	lynamics CRM
ecord Set As Default View	Activate	Assign Saved Views	Generation Start Workflow Dialog	Run Export Saved
View	Records	Collaborate	Process	Data
🖁 Bookable Produ	ucts Saved Views: A	ctive Saved Views 🔹		
Name 🔺		Owner	Last Modified	
16:6		Hospitality A	dmi 06/12/2013 12	2:59
Retail Products		Hospitality A	dmi. 11/05/2014 13	649



e) A box entitled 'Who would you like to share the selected saved view with' will be displayed. In the **Common Task** bar, highlighted below, select **Add User/Team.** 

Add User/Team	0	Name	Read	Write	Delete	Append	Assign	Share
Remove Selected Items								
<ul> <li>Toggle All Permissions of the Selected Items</li> <li>Reset</li> </ul>								
				This rec	ord is not share:	L.		
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f) The Look Up Records dialogue box will appear listing the users who you are able to share this view with. Select the appropriate user by placing a tick next to their name and selecting Add or create a new user by selecting New. Upon choosing all of the users to share the view with, select Ok.

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g) The users you have selected to share the view with will appear in the 'who you would like to share the selected view with' form. Confirm these users by selecting **Ok**.



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h) Your saved view will now be shared with the chosen users.



# **3. PRODUCT MANAGEMENT – PUTTING A PRODUCT ON SALE**

This section aims to guide you through the process of putting products on sale on one or more of your available sales channels. The product could be a Series, a Fixture or a Stock type product.



**Note.** This guide assumes that your infrastructure (channels, payment methods, etc.) and venue (venue configuration, blocks, etc.) are already in place.

## 3.1. OVERVIEW

To place a Fixture, Series or Stock type product on sale certain aspects of the system need to be set up. The order in which the steps are completed is not necessarily important, but the framework below shows the inter-dependency of the various entities in the Green 4 Ticketing system and what needs to be in place for a product to be put on sale. A glossary of terms has also been included to assist users in understanding the terminology of the system.

Venue Setup	Planning	Puttin	g Products on	Sale
Set up Venue, Blocks, Venue Configuration, Bookable Resources and Channels	Business planning to define products, pricing and sale dates	Set up Product Variants and Variant Price Lists	Create Sales Plans and set up Channel Price Lists	Set up the Products
Green 4 Ticketing Venue Management Not covered in this guide	Business Process Not covered in this guide		cketing Product Man ructions included in t	-

The table below contains a more detailed description of the elements of the framework above.

Action	Stadium Setup	Planning	Product Variant Types	Sales Plans and Pricing	Bookable Products, Series and Fixtures
What needs to be done?	A prerequisite for putting a Series or Fixture on Sale is ensuring the Stadium / Venue and related entities have been set up	Define - What products need to be put on sale and what they will be called - Where do they need to be sold from	Check all required Variant Types are set up	Set up Sales Plans and Channel Price Lists to manage the pricing and sales dates of your products (series, fixtures, stock, etc.)	Set up Bookable Products that relate to Bookable Resources Set up products as required e.g. Series, Fixtures, Stock, Auto-Scheduled, Scheduled, Memberships.



Action	Stadium Setup	Planning	Product Variant Types	Sales Plans and Pricing	Bookable Products, Series and Fixtures	
		<ul> <li>e.g. POS, Web?</li> <li>The variants or types of product that will be sold e.g. Adult, Junior</li> <li>When the products need to go on sale</li> <li>Any special requirements in terms of sales and pricing e.g. early bird offers for season card holders</li> <li>Overall pricing strategy</li> </ul>				
Where is this done?	Venue Management	Outside of the Green 4 System	Product Management	Product Management	Product Management	
What needs to be set up in the system?	<ul> <li>Venue</li> <li>Blocks</li> <li>Venue Block Configuration</li> <li>Areas</li> <li>Seat Classes</li> <li>Bookable Resources</li> <li>Channels</li> </ul>	Nothing at this stage	Variations of the product to be put on sale e.g. Adult, Junior Variant Price Lists, created for pricing regimes.	<ul> <li>Sales Plans</li> <li>Channel Price Lists. These need to be associated to a Sales Plan</li> </ul>	<ul> <li>Series</li> <li>Fixtures</li> <li>Stock Products</li> <li>Scheduled</li> <li>Auto Scheduled</li> <li>Memberships</li> <li>Passes</li> <li>Cross Sell</li> </ul>	
Covered in this user guide?	The set-up of Venues, Blocks, the Venue Configuration, Bookable Resources and Channels is not covered in this guide	No – this relates to your internal business processes	Yes	Yes	Yes	



Glossary of Terms	Meaning	Notes <sup>1</sup>
Venue Management	The area of the Green 4 Ticketing solution where the stadium or venue is set up. Blocks and zones are defined as well as seating in the stadium or venue	Not covered in this guide
Venue	The stadium or venue where the fixture or event will be held	Typically set up once and reused for different series, fixtures and events. However for Away fixtures a different venue will need to be created for each fixture.
Venue Configuration	Different configurations or ways in which the stadium or venue can be set up e.g. seats available for a concert could be different to those available for a football match	Typically set up once and reused for different events
Bookable Resources	The bookable resource is the item you are selling, for example the seats in the stadium. The bookable resource will be linked to the venue configuration and blocks in use via a venue configuration block	<ul> <li>Typically set up once and reused for different fixtures and series</li> <li>Related to</li> <li>Venue Configuration</li> <li>Bookable Products</li> </ul>
Channels	A sales channel is the route through which products are sold. Examples could include a web channel, ticket office channel, etc.	<ul> <li>Typically set up once and reused for different fixtures and series</li> <li>Related to</li> <li>Channel Price Lists</li> <li>Payment Methods</li> </ul>
Product Management	The area of Green 4 Ticketing where the different products that will be put on sale are set up as well as the pricing of these products	
Analysis Categories	Categories that can be defined to group different products together and display a hierarchy of products for display on the sales channel	Can be used for grouping Stock type products that are sold on the POS and the Web. Also used for reporting purposes.
Bookable Products	The Bookable Product is used to represent the product that you are	If the Bookable Product of type Series or Fixture, it will be linked

 $<sup>^{1}</sup>$  Only related entities that pertain to the product management functionality are included here



Glossary of Terms	Meaning	Notes <sup>1</sup>
	selling – for example a match ticket, a programme, a season ticket	<ul> <li>to a bookable resource which will determine capacity and which seats are available when the product is purchased</li> <li>Related to</li> <li>Analysis Category</li> <li>Bookable Resource</li> <li>Series</li> </ul>
Series	A series is used to represent a group of fixtures. This may be a season (football, rugby or cricket), or a multi-day match (cricket)	<ul> <li>Needs to be set up for each new series put on sale</li> <li>Related to</li> <li>Venue</li> <li>Venue Configuration</li> <li>Fixture</li> <li>Sales Plan</li> </ul>
Fixtures	A fixture is used to represent a match or event. For example a fixture could be used to represent a football or rugby match, a concert or a single day of a multi-day match (cricket)	<ul> <li>Typically set up each time there is a new match or event.</li> <li>Related to</li> <li>Venue</li> <li>Venue Configuration</li> <li>Series: A fixture has to be linked to a series in order to be on sale</li> <li>Sales Plan</li> </ul>
Stock Products	A stock product is set up to sell a specific item e.g. retail items such as shirts, shorts etc.	Set up each time there is a new product to be sold
Scheduled Products	A Scheduled product is set up to sell a ticket for a specified activity	Ticket is valid for a specific date, time and venue. The date and time is manually scheduled. The set up can include a link to a human resource e.g. a ski instructor or a tour guide.



Glossary of Terms	Meaning	Notes <sup>1</sup>
Auto Scheduled Products	A auto scheduled product is set up to sell a ticket for a specific activity	Ticket is valid for a specific date, time and venue. The date and time is auto-scheduled. The set up can include a link to a human resource e.g. a tour guide
Memberships	A product that includes access to specified activities or events. It is typically for a specified period	Can be for set durations e.g. Annual, Monthly or Weekly Can include different products Can provide a specified discount to certain products A membership number can be manually entered or auto generated
Sales Plans	Blanket facility to manage the dates, pricing, channels and entitlements for putting a Series, Fixture or any other product type on sale	Can be reused, assists with the administration of managing Channel Price Lists and Sale Dates Related to - Channel Price Lists - Series - Fixtures
Channel Price List	<ul> <li>The channel price list is used to manage the</li> <li>Channel a product is sold on</li> <li>Variant price list to be used</li> <li>On and Off Sale Dates and Hours before an event</li> <li>Activity Start and End dates</li> <li>Associated Marketing Lists</li> <li>Quantities of a product that can be sold</li> <li>Discounts that can be associated to products when sold</li> <li>On/Off absolute Sale Dates for stock products.</li> </ul>	Can be reused Related to - Sales Plan - Fixtures - Series - Other product types - Channel - Variant Price List - Entitlements
Cross Sell Products	Cross sell products allow one product to be cross sold with another, therefore offering the option to buy another	. This is often used in the leisure industry, for example it is common practice for a leisure



Glossary of Terms	Meaning	Notes <sup>1</sup>
	product when the cross sell has been set up. This enables the end customer using the Web or the POS operator to swap a product to be purchased with another product	attraction to try and convert day passes into annual passes.

# **3.2. VARIANT TYPES**

Variant Type describes the type of Bookable Product you can purchase. For example Adult, Junior and Senior may be Variant Types for a ticket Bookable Product, whereas for a Shirt, the variants may be: Large, Medium and Small. Once Variant Types have been set up in the system, they can be used for different product types and do not need to be set up again. Where possible, it is recommended that you re-use Variant Types to define a product's variants. For example, Adult, Senior and Junior could be used for all fixture and series tickets and it is not necessary to create a set of variant types for each fixture or series product you add to the system. Before setting up a new Variant Type, check that it does not already exist.

To create a Variant Type record:

- a) In the CRM Navigation Panel, select Product Management followed by Variant Types.
- b) The Variant Types view will be displayed showing a list of all the Variant Types that meet the current view criteria.
- c) To add a new Variant Type, select **New** on the ribbon (highlighted in the figure below).

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



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A Processes	Voucher Value	£	Tariff Code	
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- **Name.** Enter a name for the variant type.
- **Translated Name.** This field is used when the system is being translated into another language. Multiple translations can be added in the one field. <u>See the Set up for Multi Lingual using the Translation Field</u>
- **Description.** Enter a description of the variant type.
- Skidata Class Code. Used for access control.
- Voucher Value. Used for voucher variants.
- Sequence. Used to display a certain sequence of Variant Types.
- **People.** Enter the number of people included in the variant type. For example enter 4 if creating a "Family of 4" variant type. If more than one person is included in the variant type it will be necessary to create the appropriate Variant Type Component records (see <u>Variant Type Components</u> for details).
- **Category.** Used to group the variant types into categories for reporting purposes and for use in the price list editor. For example tickets, men clothing etc.



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

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

#### **VARIANT TYPE COMPONENTS**

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

To create a Variant Type Components record:

- a) With the Variant Type open in the Variant Type form, select Variant Type Components in the form navigation panel.
- b) The Variant Type Components view will be displayed:



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Processes     Workflows     Dialog Sessions		No	Variant Type Component	records are available	in this view.		

- d) Select Add New Variant Type Component on the ribbon (highlighted in the above figure).
- e) A blank Variant Type Component form will be displayed:

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Common     Audit History	* General Name*	/ 460	ж	Part of Variant Type	a family Offer of 4	
Processes     Workflows     Dialog Sessions	Quantity*	2		Variant Type *	(à Aduit	

- f) Complete the following details:
  - Name. The name of the Variant Type Component, for example Adult.
  - Quantity. The number of people included in the Variant Type Component, e.g. 2 Adults for a family ticket.
  - **Part of Variant Type.** The name of the parent variant type will be displayed.
  - Variant Type. Select the variant type representing the component. For example Adult if defining the number of Adults included on a family ticket.
- g) Select Save and Close to continue.
- h) Repeat the above steps to create a new Variant Type Component record for each element included in the variant type, for example a component for Adults and a component for Juniors included on a family ticket.
- i) Once all Variant Type Components have been created, select Save and Close to continue.



# **3.3. VARIANT PRICE LISTS**

A Variant Price List must be created as it is selected in the Variant and Pricing section of the Bookable Product form, this being where the pricing of the product is entered into. The Variant Price Lists are also subsequently linked to the channel using the channel price list entity. Separate Variant Price list will need to be created if for example a sports club offers early bird and standard season ticket sales, or if a leisure attraction offers various types of attractions such as general admission and special events. This is because for differing sets of prices a new Variant Price List will need creating.

- a) In the CRM Navigation Panel select Product Management followed by Variant Price Lists.
- b) The Variant Price List view will be displayed:

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Series	Cup Match	Cup Match		
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	Early Bird			Active
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	Matchday Price	Matchday Prices		Active
Venue Management	Matchday Ticket			Active
Membership	Membership (14) Early Bird			Active
Promotions	Membership (14) Standard			Active
	POS - Matche	POS - Matchday		
Service	retail	retail		

- c) If a suitable price list exists, double-click over the appropriate row in the list. Alternatively select **New** on the ribbon to create a new variant price list.
- d) The Variant Price List form will be displayed. If creating a new variant price list, enter the following details:
- Name. Enter a name for the price list.
- Price List Status. Select the price list status from the drop-down list. Only price lists with a status of Active will be used to provide pricing information in Green 4 Ticketing.
- e) Select Save and Close on the ribbon.



# **3.4. SALES PLANS**

Sales Plan functionality has been included to assist with the management and administration of putting products on sale and have to be used for all product types. The setting up of a Sales Plan is mandatory and needs to be done in advance of putting fixtures, series or other products on sale. Different types of Sales Plans can be set up, these include, Fixtures, Series and Other. The type 'other' would be used for all other types of events or products being set up in the system e.g. stock, scheduled and unscheduled products.

Linked to Sales Plans are Channel Price Lists. Channel Price Lists link the Channel and Variant Price Lists together, for each Channel and Variant Price List combination a new Channel Price List must be created. Furthermore the Channel Price List controls when a Products goes on and off sale. The Channel Price List then links to the Bookable Product when the same Channel and Variant Price List are selected in the Channel and Variant as well as the Pricing section of a Bookable Product form. Furthermore Channel Price lists are where <u>Entitlements</u> are set up, this being the process to allow customers, who are contained in a Marketing List, to obtain a preferential price for a product



The benefits the Sales Plan functionality offers is described below.

- Facilitates the set-up of a plan for selling specific occurrences e.g.
  - Seasonal events
  - Early bird specials
  - o Discounts automatically applied to purchases members make
  - Early purchase offers for a specified audience
  - o Limited product purchases for a specified audience



- Controls when a fixture, series or event goes on and off sale
- Is linked to channel price lists that define the number of days and/or hours before the start of an item going on sale and the number of days and/or hours before the end of that item going off sale. The number of days can be negative i.e. -1 day to leave an item on sale 1 day after the end date
- Reusability Sales Plans can be set up and reused when new fixtures or events are put on sale



**Note.** The Sales Plan functionality has been developed to aid the setting up of Series and Fixtures, and effectively do away with the need to set up channel price lists against each Series and Fixture to govern changing pricing regimes over time.

As part of the upgrade to v3.6 a script is run to add default sales plans to the system – however this does not remove previously created channel price lists linked to existing fixtures or series. Once the sales plan structure has been put into place to govern the pricing it is necessary to deactivate any channel price lists that are linked to your fixtures or series to ensure there are no conflicts going forward.

# **3.5. PLACING A NEW FIXTURE ON SALE**

Fixtures are not only used to place an individual sports game on sale, for example Leicester City vs Green 4 FC, but are also used when placing an event such as a music concert or other performance on sale. The flow below is the process of how it is possible to put a Fixture on sale.



The following section will assume that you have previously set up the following items:

- Channels ensure that the Show Stadium Options has been set to Yes to show the options for Fixtures and Series on the POS home screen.
- Venue, Venue Configuration and Bookable Resource. See the Green 4 Venue Management User Guide.
- Variant Types (Section 3.2).
- Variant Price List (Section 3.3).

#### **STEP 1: CREATE THE FIXTURE SALES PLANS**



Sales Plan functionality has been included to assist with the management and administration of putting products on sale and have to be used for all product types. A fixture type Sales Plan, with a linked Channel Price List must be created in order to place a fixture on sale.

To set up a Sales Plan for a Fixture:



a) In the CRM **Navigation Panel**, select **Product Management** followed by **Sales Plan**. A list of Sales Plans matching the view criteria will be displayed.

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Product Generality	CP Series Sizes Plan	Series	08/09/2054 09:44			
A Reservation	Cup 14/15	Series	04/09/2014 11:12			
à Serles	Home Foture 14/15	Fadure	01/09/2014 14:17			
Variant Price Lists	Sample Sales Plan - Fisture	Fature	21/07/2014 05:34			
& Valant Types	Sample Sales Plan - General	Other	21/07/2014 08:14			
d Sales Parts	Sample Salas Plan - Saras	Series	21/07/2014 05:14			
1.10/10/10/10/1	5eason 14/25	Series	03/09/2014 1438			
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b) To add a new Sales Plan, select New on the ribbon.

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- c) Enter a name for the Sales Plan.
- d) From the drop down select the Sales Plan Type of Fixture.
- e) Select Save in the ribbon.
- f) From the Related Item menu, select the **Channel Price List** option.
- g) An existing Channel Price List can be linked to the Sales Plan or a New Channel Price List can be created.



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Channel Price Lists are used to link Variant Price List to a Channel as well as controlling when a product goes on and off sale. Channel Price Lists are connected to a Sales Plan, which in turn is linked to the relevant fixture record. Linked to a Sales Plan you may have multiple Channel Price Lists that allow the changing of the products on sale and the prices charged over time, see <u>Examples: Using Sales Plans to set up a Series and Fixtures</u> for more details.

- a) From the Navigation Area in the Sales Plan, select the Channel Price List option.
- b) To add a New Channel Price List for a Series or Fixtures select the Add New Channel Price List option on the ribbon.

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c) A blank Channel Price List form will be displayed. Complete the following details:

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	Marketing List			Mes Quartity		
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	Discount Celepory		-			
	Sequence					

- Name. Enter a name for the Channel Price List. The name can be anything, but should be meaningful.
- **Channel.** Using the Look Up Records select the channel the price list applies to. A new Channel Price List must be set up for each channel you would like to sell the product on, for example POS and web.

On Sale Days Before. Enter the number of days before the start of the fixture when the Channel Price List will come into use. This will apply for all fixtures linked to the Sales Plan. So for instance each fixture will come on sale in turn 30 days before the fixture date. For examples see the following section <u>Using Sales Plans to set up a Series and Fixtures</u>.

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- Off Sale Days Before. Enter the number of days before the end of the fixture when the Channel Price List will stop being in use. This will apply for all fixtures linked to the Sales Plan. So for instance each fixture will go off sale in turn 1 days before the fixture end date. For example if all fixture products are to be removed from sale on the web a day before the fixture enter 1. The value can be a negative number e.g. -1 to allow for ticket reconciliation on the POS channels after the fixture has passed. For examples see the following section <u>Using Sales Plans to set up a Series and Fixtures</u>.
- **Marketing List.** If the Channel Price List is only to be used for a subset of customers (e.g. Members, Season Ticket Holders, Corporate Customers, Etc.), select the Marketing List that defines the subset.
- **Discount Percent.** If using a discount, enter the discount that is to be applied when the Channel Price List is used. For example if setting up early bird season ticket pricing, rather than having two price lists in use (one for early bird pricing, one for standard pricing) you may apply a 20% discount across all prices included on the standard price list. This option can be used in conjunction with a marketing list to offer members of the marketing list a discount. It is also possible to enter a discount percent to a channel price list that does not have a marketing list, all product sold using the channel price list will then be subject to the entered discount.
- **Discount Category.** If using a discount, use the lookup to select the product category the discount percent will be applied to. If a product category is not entered, the discount percent will be applied to all products.
- Variant Price List. Use the Lookup Records dialog to select the appropriate price list. The price list you are to use when creating your bookable product must be used.
- On Sale Hours Before. Enter the number of hours before the start of the fixture when the Channel Price List will come into use. This will apply for all fixtures linked to the sales plan. So for instance each the price of fixture products will increase 3 hours before kick-off. For examples see the following section <u>Using Sales Plans to set up</u> a <u>Series and Fixtures</u>.
- Off Sale Hours Before. Enter the number of hours before the end of the fixture when the channel price list will stop being use. This will apply for all fixtures linked to the sales plan. So for instance each fixture products will go off sale 3 hours before kick-off. For examples see the following section <u>Using Sales Plans to set up a Series</u> and Fixtures.
- Max Quantity. Enter the maximum number of products the customer can purchase when the channel price list is in use.
- **Discount Rounding.** If using a discount, enter the discount rounding i.e. to the nearest penny, 10p, pound. If a value is not entered the system will default to rounding to a penny.



**Note.** All other fields in the Channel Price List form that have not been described above do not need to be completed/changed.

**Note.** A channel price list will need to be created for each Variant Price List – Channel combination created.
d) Once the Channel Price List is complete select **Save and Close** in the ribbon. Many Channel Price Lists can be linked to a singal Sales Plan, so therefore the above steps can be repeated for each Channel-Variant Price List that is to be availuable on your system.

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#### **STEP 3: CREATE THE FIXTURES**



The Fixtures entity is used to add the details of individual fixtures that are to be made available for sale, for example the name, date and venue of the fixture. The Fixture Sales Plan that was previously created is also added to the Fixture form.

To create a new fixture complete the following:

- a) Select **Product Management** in the navigation bar followed by Fixtures.
- b) Select New.
- c) A blank fixture form will be displayed. Complete the following details:

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- Name. Enter a name for the fixture, for example Leicester City vs Man Utd 14/15 or Concert Take That. The name will be visible in the Green 4 Ticketing application and therefore should reflect the event accurately. It is recommended that you add the season date to the fixture name to distinguish between fixtures in different series.
- Code. Utilised for access control set up.
- **Start.** Enter the start date and time of the fixture. The start time will be used in conjunction with the Channel Price List to control pricing.



- **Description.** Enter a description of the fixture. The description will be visible to users of the Green 4 Ticketing application and therefore should reflect the event accurately.
- Venue. Use the lookup to select the venue used for the series. The venue should have been set up previously as part of your venue configuration.
- Skidata Season Code. Used for access control.
- **Credit Percent.** Used when a customer selects to upgrade or move a fixture ticket linked to the series. The credit percent represents how the value of the customer's season ticket against the value of the fixture product they are upgrading/moving to. This field can be left blank if upgrades and moves are not available on your system.
- Select Seats. Select Yes if the customer is to be allowed to select their own seats when using the Green 4 Ticketing web ticketing site.
- End. Enter the end date and time of the fixture. The start time will be used in conjunction with the Channel Price List to control pricing.
- Venue Configuration. Use the lookup to select the venue configuration used for the series. The venue configuration should have been set up previously as part of your venue configuration.
- **Fixture Sponsor.** Enter the name of the sponsor for the fixture. The fixture sponsor can be included on the ticket if the appropriate information is added to the print transform.
- Sales Plan. Use the Look Up to select an appropriate Fixtures Sales Plan. The Sales Plan Type chosen here should be a Fixture Sales Plan such as the one created in <u>Step 1</u>
- **Display Group.** If Fixtures are to be grouped together on the POS enter the name of the group here. For example a group called Friendlies could be entered into the Display Group field for all friendly fixtures to be grouped together. If a display group has been entered for some Fixtures whilst others do not have a Display Group, all fixtures that are not part of a Display Group will be shown in a group on the POS called "No 'Display Group' has been set for these fixtures."
- Record Away Ticket Details. Select No, this is used when setting up away tickets.



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

- d) Once the details are complete, select **Save & Close** on the ribbon.
- e) The Lookup Records dialog will be redisplayed showing the details of your fixture. Select the fixture and click **OK** to return to the series form.
- f) Repeat the above process for each new fixture that you wish to create.

#### Adding an Image to a Fixture

It is possible to add images, for example event logos or team emblems, to a fixture. If added these will be displayed on the website when customer's view the list of available fixtures. You can add two images to the fixture, one for the home team



and one for the away team. The images used must be 100px x 100px and either a jpg or png file. The background of the images used should be either transparent or match the background colour of your ticketing website.



**Note.** The name of the attachment and note must match the configuration defined for your organisation's web site (or RSS site). If you encounter problems please contact your system administrator or the Green 4 support team.

To add a logo:

a) With the fixture open in the form view, select the **Add** tab above the ribbon (highlighted below).



- b) Select Attach File on the ribbon.
- c) The Manage Attachment dialog will be displayed. Click **Browse** to search for the file, before clicking **Open**.
- d) The Manage Attachment dialog will be redisplayed. Select **Attach** to continue.
- e) The Notes section of the Fixture form will be displayed:

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* Notes	
Title: Tile Attactment Note created as 33/03/2014 10:58 by Green 4 1068 Re nature Anti pp (1.220 0/1001)	84946 SLUSQUIA 1050 to Green 4 DBA

f) Double-click over the note and update the **Title** to **home** for the home logo or **away** for the away logo. Once the details are correct, select **Save & Close** on the toolbar.



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g) Repeat the above process to upload a second image.

#### **STEP 4: CREATE A SERIES AND ADD THE FIXTURES**



The Series entity is used to represent a group of fixtures, for example a season, half season, multiday match ticket. Even if selling individual fixture tickets they must still be connected to a Series and therefore a Series must be created. A fixture can be included in more than one Series. For example a sports team's fixture may be included in the club's full season Series and half season Series. A fixture **must** be part of a Series to be available for sale.

To create a Series record:

- a) In CRM, select Product Management in the navigation bar before selecting Series.
- b) A list of currently active Series will be displayed, if a relevant Series does not already exist, select **New** on the ribbon or open up an existing Series.



c) Ensure the following fields are completed in the Series form:

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- **Name.** Enter a name for the series. For example Home Fixtures 14/15. The series name will be visible on your sales channels and potentially the tickets you print from the system.
- Description. Enter a description of the series. The series description will be visible on your sales channels.
- **Venue.** Use the lookup to select the venue used for the series. The venue should have been set up previously as part of your venue configuration.
- Select Seats. Select Yes if the purchaser is to be allowed to select their own seats when using the Internet sales site.
- Series Start Date. Enter the start date of the series. This will be used in conjunction with the sales plan to determine when series products go on sale.
- Venue Configuration. Use the lookup to select the venue configuration used for the series. The venue configuration should have been set up previously as part of your venue configuration. The venue configuration selected should be the most restricted with regards to the seats available.
- Skidata Season Code. Used for access control.



- **Series Sponsor.** Enter the name of the sponsor for the series. The sponsor can be printed onto your tickets if required.
- Series End Date. Enter the end date of the series. This will be used in conjunction with the sales plan to determine when series products goes off sale.



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

- d) Once the details are complete select **Save** on the ribbon, the Fixtures created in <u>Step 3</u> must now be added to the Series.
- e) With the Series open in the form view, select Fixtures in the form navigation area.



- f) Select Add Existing Fixture on the ribbon
- g) The Look Up Records dialog will be displayed.



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- h) Enter the name of the fixture into the **Search** for records field (highlighted above) before clicking the magnifying glass icon.
- i) Any fixture records matching the search term entered will be listed in the results panel.
- j) Select the checkbox alongside the fixtures to be linked to the series before clicking Add. The selected fixtures will be moved to the Selected Records panel.
- k) Once the list of selected records is completed, click **OK** to continue.
- I) The Series form will be redisplayed with the selected fixtures listed.
- m) Select general in the Navigation Area before clicking Save and Close on the ribbon.



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The Bookable Product entity is used to represent products that are sold through the Green 4 Ticketing application, for example the match ticket or concert ticket itself. For each product that you are selling through the system (i.e. a fixture) you must create a Bookable Product. A fixture type Bookable Product must be created for fixtures to be sold.

A fixture Bookable Product will be linked to a Bookable Resource, which in turn will determine which seats (or standing capacity) are available to the purchaser when the product is selected.

To create a Bookable Product:

- a) On the CRM navigation bar, select Product Management before choosing Bookable Products.
- b) A list of currently active Bookable Products will be displayed. Select New on the ribbon.



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

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General:

- Name. Enter a name for the product. The name will be visible to customers, and should therefore reflect the nature of the product, for example Fixtures 14/15.
- **Translated Name.** Used for translated implementations. For more information <u>see the Set up for Multi</u> <u>Lingual using the Translation Field</u>.
- **Description.** Enter a description of the product. The Description field can be set as a translatable string if desired (if used in the Web UI). <u>See the Set up for Multi Lingual using the Translation and Description Field</u> for further information.
- **Type.** Use the drop-down list to select the **Type** this being a **Fixture**.
- Is Anonymous. Select Yes if the purchaser is not required to provide a name when buying the product. The channel must also be set to allow the sale of anonymous products.
- **Payable By.** If the product can be paid for using direct debit select the direct debit payment method.
- VAT Code. Use the lookup to select the correct tax code for the Bookable Products form.
- External Product ID. Can be used to link the Bookable Product to an external list of products.
- **Sequence.** Enter a sequence number for the product. The sequence number is used to determine the order in which products are displayed in the POS and Web channels.
- **Beneficiary Requirement.** Use the drop-down list to select if a customer's name is required when the product is purchased, for example the details of the ticket purchaser. Select from the following options:
  - i. Not Required. The customer will not be asked for their name and contact details.
  - ii. **Requested.** The customer will be asked for their name and contact details, but can skip this option if they do not wish to provide their details.
  - iii. **Required.** The customer must provide their name and contact details. This option should be selected when setting up a season ticket or membership product.
- **Report Category.** Used for reporting purposes to categorise the products sold through Green 4 Ticketing.
- **Code.** Utilised for Access Control set up.
- Available Offline. Select Yes if the Bookable Product is to be available for purchase through the offline POS. This option cannot be used for products that require capacity to be monitored.
- **Fixture Coupon Product.** If using a coupon, enter the **Fixture Coupon** which is to be used for the partial coupon if relevant.



**Referring Entities:** 

- Bookable Resource. The bookable resource selected will determine which seats are available to the customer to purchase (for example, standard or hospitality). Select the Look Up icon alongside the field. The Look Up Records dialog will be displayed. Highlight and add the appropriate bookable resource. If the required bookable resource is not available contact your system administrator.
- Series. Use the Look Up tool to select the relevant series that was previously created in <u>Step 4.</u>
- **Category.** Use the Look Up dialog to select the product category. The category is used to group products, for example into tickets, food, etc. The categories are used by the price list and channel editors.



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

- d) Once the details are complete select **Save** on the ribbon.
- e) Next, it is necessary to indicate which channels the product can be bought via. To set the Channels carry out the following:
  - Select Channels in the Form Navigation area.
  - The Channels that have been set up during the configuration on your system will be listed. Select the checkbox alongside each Channel through which the product will be sold, for example POS and Web.
  - Select **Save** on the ribbon.
- f) Next, it is necessary to identify the Product Variants and Prices:
  - Select Variants & Pricing in the Form Navigation area.
  - To select a variant, in the drop-down list on the left hand side (highlighted below), select the appropriate option. All of the variants available in your system will be listed. If you have categorised the variants they will displayed in the relevant categories.
  - Select the green cross alongside the variant name to add.



Bookable Product Ad	d Customize
Save & New New Save & New Save & New Save & New Save	Sharing - Copy a Link Collaborate Collaborate Process Data
Save	Collaborate Process Data
Information  General Channels Variants & Pricing Bowling Notes  Related	Bookable Product     test     Variants & Pricing     Not for Sale
Common     Activities     Closed Activities     Audit History     Additional Products	Variant Type

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



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

To enter price information for the product, select the relevant Variant Price List from the drop down at the top of the Variants & Pricing section (highlighted below). A Channel Price List must have been created in <a href="Step 2">Step 2</a> that has both the Channels and Channel Price List selected here linked to it.

riants & Pricing				6
	Not for Sale	Mandatory Variant	Match Day NEW	. 1
East 2013 (Adult Season)				
East 2013 (Junior Season)				Existing Variant
East 2013 (Senior Season)				Price Lists
East 2013 (Student Season)				
East Stand 2013 (Former Players Season)				

- Enter the pricing (peak and off peak) information for each of the variants that are to be included on the price list. The peak and off peak price should be the same.
- Repeat this process for each price list used to govern the pricing of the selected product.
- g) Once the pricing details are complete select Save & Close on the ribbon to save the product.

#### 

## FIXTURE TICKET ON SALE CHECK LIST

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

Task	Completed?	Comments
Created Fixture type Sales Plan		Ensure the type of Sales Plan created here is Fixture.
Created Channel Price Lists		The channel price list should link the channels to the variant price list.
		Ensure the On and Off Sale hours have been entered.
Created the fixtures		Ensure the fixture Start and End date and time are correct.
		Ensure that a Venue and Venue Configuration have been entered.
		Add the Fixture type Sales Plan.
		Repeat the steps for each Fixture that needs creating.
Created a Series and add the Fixtures		Ensure that a Venue and Venue Configuration have been entered.
		Add the Series start and end date.
		Add the Fixtures that have been created to the Series.
Created the Fixture Bookable Product		Ensure the Bookable Product Type is Fixture.
		A Bookable Product must be linked to a Bookable Resource. In turn the Bookable Resource must be linked to the Venue configuration linked to the fixture.
		Ensure the Series that has the chosen fixtures linked to it is added into the Bookable Product
		Ensure a Category has been added to the Bookable Product
Assigned channels to the bookable product		Ensure the relevant Channel check boxes are ticked.
Assigned variants to the bookable product		Ensure the variants have been added.
Assigned prices to the bookable product		Prices should be added to an active Variant Price List.



# 3.6. PLACING A NEW SERIES ON SALE

The Series entity is used to represent a group of fixtures, for example a season, half season or multiday match ticket. The fixtures that are part of a Series must be added to the Series. For example if a Season Ticket is to be put on sale, then the individual fixtures that make up the games throughout the season must be added to the Season Ticket. It is also possible for fixtures to be included in more than one Series. For example a football fixture maybe included in the club's full season series and half season series. The flow below is the process of how it is possible to place a Series on Sale.



The following section will assume that you have previously set up the following items:

- Channels ensure that the Show Stadium Options has been set to Yes to show the options for Fixtures and Series on the Epos home screen.
- Venue, Venue Configuration and Bookable Resource. See the Green 4 Venue Management User Guide.
- Variant Types (Section 3.2).
- Variant Price List (Section 3.3).
- **Fixtures** These should already have been created. See section 3.5; <u>Step 3: Create the Fixtures</u> for information on how to create new fixtures.

#### **STEP 1: CREATE THE SERIES SALES PLANS**



Sales Plan functionality has been included to assist with the management and administration of putting products on sale and have to be used for all product types. A Series type Sales Plan, with a linked Channel Price List must be created in order to place a Series on sale.

To set up a Sales Plan for a Series:

a) In the CRM **Navigation Panel**, select **Product Management** followed by **Sales Plan**. A list of Sales Plans matching the view criteria will be displayed.



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Accessions Server Variant Price Litts Variant Types	CP Series Sales Plan	Series	08/09/2014 09:44
Gener Variant Price Lists Variant Types	C.#1415	Series	04/09/2014 11:12
A Variant Types	Home Future 14/15	Enture	03/09/2014 14:17
	Sample Sales Plan - Fisture	Fisture	21/07/2014 06:34
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200000	5eaccr 14/25	Series	03/09/2014 1438
Workplace	vs Green 4 HC 14/13	Fisture	05/09/2014 15:59
Sales			
Marketing			
Lovalty			
Bookings			
Product Management			
Venue Management			
Membership	1 - 10 of 10 (Diselected)		

b) To add a new Sales Plan, select New on the ribbon.

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Related	Name*  Notes	1	Sales Pian Type *	

- c) Enter a name for the Sales Plan.
- d) From the drop down select the Sales Plan Type of Series.
- e) Select Save in the ribbon.
- f) From the Navigation Area, select the Channel Price List option.
- g) An existing Channel Price List can be linked to the Sales Plan or a New Channel Price List can be created. Many Channel Price Lists can be linked to a Sales Plan.



### **STEP 2: CREATE THE SERIES CHANNEL PRICE LISTS**



Channel Price Lists are used to link Variant Price List to a Channel as well as controlling when a product goes on and off sale. Channel Price Lists are connected to a Sales Plan, which in turn is linked to the relevant Series record. Linked to a Sales Plan you may have multiple Channel Price Lists that allow the changing of the products on sale and the prices charged over time, see <u>Examples: Using Sales Plans to set up a Series and Fixtures</u> for more details.

- a) From the Navigation Area in the Sales Plan, select the Channel Price List option.
- b) To add a New Channel Price List for a Series or Fixtures select the Add New Channel Price List option on the ribbon.

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c) A blank Channel Price List form will be displayed. Complete the following details:

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	Activity Start Date	(#88.w)		Activity End Date		10
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	Decount Category		146			

- Name. Enter a name for the Channel Price List. The name can be anything, but should be meaningful.
- **Channel.** Using the Look Up Records select the channel the price list applies to. A new Channel Price List must be set up for each channel you would like to sell the product on, for example POS and web.

• On Sale Days Before. Enter the number of days before the start of the Series when the Channel Price List will come into use. This will apply for all Series linked to the Sales Plan. For examples see the following section Using Sales Plans to set up a Series and Fixtures.

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- Off Sale Days Before. Enter the number of days before the end of Series when the Channel Price List will stop being in use. This will apply for all Series linked to the Sales Plan. For examples see the following section <u>Using Sales Plans to set up a Series and Fixtures</u>.
- **Marketing List.** If the Channel Price List is only to be used for a subset of customers (e.g. Members, Season Ticket Holders, Corporate Customers, Etc.), select the Marketing List that defines the subset.
- **Discount Percent.** If using a discount, enter the discount that is to be applied when the Channel Price List is used. For example if setting up early bird season ticket pricing, rather than having two price lists in use (one for early bird pricing, one for standard pricing) you may apply a 20% discount across all prices included on the standard price list. This option can be used in conjunction with a marketing list to offer members of the marketing list a discount. It is also possible to enter a discount percent to a channel price list that does not have a marketing list, all product sold using the channel price list will then be subject to the entered discount.
- **Discount Category.** If using a discount, use the lookup to select the product category the discount percent will be applied to. If a product category is not entered, the discount percent will be applied to all products.
- Variant Price List. Use the Lookup Records dialog to select the appropriate price list. The price list you are to use when creating your bookable product must be used.
- On Sale Hours Before. Enter the number of hours before the start of the Series when the Channel Price List will come into use. This will apply for all Series linked to the sales plan. For examples see the following section <u>Using Sales Plans to set up a Series and Fixtures</u>.
- Off Sale Hours Before. Enter the number of hours before the end of the Series when the channel price list will stop being use. This will apply for all Series linked to the sales plan. For examples see the following section Using Sales Plans to set up a Series and Fixtures.
- Max Quantity. Enter the maximum number of products the customer can purchase when the channel price list is in use.
- **Discount Rounding.** If using a discount, enter the discount rounding i.e. to the nearest penny, 10p, pound. If a value is not entered the system will default to rounding to a penny.



**Note.** All other fields in the Channel Price List form that have not been described above do not need to be completed/changed.

**Note.** A channel price list will need to be created for each Variant Price List – Channel combination created.

e) Once the Channel Price List is complete select **Save and Close** in the ribbon. Many Channel Price Lists can be linked to a singal Sales Plan, so therefore the above steps can be repeated for each Channel-Variant Price List that is to be availuable on your system.



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The series entity is used to represent a group of fixtures, for example a season, half season or multiday match ticket. The fixtures that are part of a Series must be added to the Series. For example if a Season Ticket is to be put on sale, then the individual fixtures that make up the games throughout the season must be added to the Season Ticket. It is also possible for fixtures to be included in more than one series. For example a football fixture maybe included in the club's full season series and half season series.

#### **Placing an Existing Series on Sale**



**Note.** If fixtures have already been placed on sale individually and they are therefore part of an existing Series as is demonstrated in <u>Section 3.6 Placing a new Fixture on sale</u>, then it is possible to put this existing Series on sale without having to create a new Series form.

To do this a Series Sales Plan created in <u>Steps 1</u> with a linked Channel Price List (<u>Steps 2</u>) will need adding to the existing Series form.

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

- I. In CRM, select Series on the Product Management tab, find and open the existing Series form.
- II. Ensure that the field entitled **Sales Plan** has a **Series type Sales Plan** attached to it via the Look Up.
- III. Upon adding the Series type Sales Plan, select Save and Close on the ribbon.
- IV. A Series type Bookable Product must now be completed where the cost of the Series and Channels it will be available on will be set up. Skip to <u>Step 5</u> for instructions on how to complete this form.

To create and place a new Series on sale:

a) In CRM, select Series on the Product Management tab.





- b) A list of active Series will be displayed. Select **New** on the ribbon.
- c) A blank series form will be displayed. Complete the following fields:

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Personal Action	4 General				
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- Name. Enter a name for the series. For example Season Ticket 14/15. The series name will be visible on your sales channels and potentially the tickets you print from the system.
- Description. Enter a description of the series. The series description will be visible on your sales channels.
- Venue. Use the lookup to select the venue used for the series. The venue should have been set up previously as part of your venue configuration.
- Select Seats. Select Yes if the purchaser is to be allowed to select their own seats when using the Green 4 Ticketing Internet sales site.
- Series Start Date. Enter the start date of the series. This will be used in conjunction with the sales plan to determine when series products go on sale.
- Sales Plan. Use the look up to select the appropriate Series Sales Plan. The Sales Plan Type chosen here should be a Series Sales Plan, such as the one created in <u>Step 1</u>.
- Venue Configuration. Use the lookup to select the Venue Configuration used for the series. The venue configuration should have been set up previously as part of your venue configuration. The venue configuration selected should be the most restricted with regards to the seats available.



**Note**. When creating a series the Venue configuration that has the most restrictions should be used. For example a club may use a Venue Configuration to move the segregation of home and away fans depending on away ticket sales. When selling a series the Venue Configuration with the largest Away fan area should be used. This will prevent any home fans ending up in the Away fans area.

- Skidata Season Code. Used for access control.
- Series Sponsor. Enter the name of the sponsor for the series. The sponsor can be printed onto your tickets if required.



- Series End Date. Enter the end date of the series. This will be used in conjunction with the sales plan to determine when series products goes off sale.
- d) Once the details are complete select **Save** on the ribbon.

### **STEP 4: ADD THE FIXTURES TO THE SERIES**



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

If no fixtures have currently been created they can be set up by following the instructions in section 3.5; <u>Step 3: Create the</u> <u>Fixtures</u>.

To add fixture to your Series carry out the following:

a) With the Series open in the form view, select **Fixtures** in the form navigation area.



- b) Select Add Existing Fixture on the ribbon.
- c) The Lookup Records dialog will be displayed.

Name -	Select Seats	Start	End
🗌 💩 Green4 FC V Featherstone FC	Yes	11/08/2012 15:00	11/*
🗒 💩 🛛 Green4 FC v Warrington Wanderers	Yes	12/07/2012 15:00	12/
League1	Yes	01/02/2013 00:00	01/
V à League 2	Yes	02/02/2013 00:00	02/
Lengue 3	Yes	03/02/2013 00:00	03/
C & League 4	Yes	04/02/2013 00:00	04/
2 à Leagues	Yes	05/02/2013 00:00	05/
•			
1 - 12 of 12 (5 selected)		)€ € Pa	gei ⊧
Selected records:	ue 3 👌 League 4 👌 Leag	ue 5	

- d) Enter the name of the fixture into the **Search for Records** field (highlighted above) before clicking the magnifying glass icon.
- e) Any fixture records matching the search term entered will be listed in the results panel.
- f) Select the checkbox alongside the fixtures to be linked to the series before clicking **Add**. The selected fixtures will be moved to the **Selected Records** panel.
- g) Once the list of selected records is completed, click **OK** to continue.
- h) The Series form will be redisplayed with the selected fixtures listed.



**Note.** When moving an existing fixture you must be cautious in case you get the double selling of seats. For example, a fixture has been sold as part of one series, then moved into a series that is already on sale and the seat has gone. Therefore if a fixture exists it must be added to the series that goes on sale.

i) Select Save and Close on the ribbon.



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The Bookable Product entity is used to represent products that are sold through the Green 4 Ticketing application, for example a Season Ticket. For each product that you are selling through the system (i.e. a Series) you must create a Bookable Product. A Series type Bookable Product must be created for a Series to be sold

A Series Bookable Product will be linked to a Bookable Resource, which in turn will determine which seats (or standing capacity) available to the purchaser when the product is selected.

To create a Series Bookable Product:

- a) On the CRM navigation panel, select Bookable Products on the Product Management tab.
- b) A list of active Bookable Products will be displayed. Select New on the ribbon.



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

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dentadan Connel Olamit Velati, kitera Seeing	New - General				(*************************************
Notes Excellent fier	Aare*	ſ			
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Canadan	Eres lat Point Description				
A Doub Artume		3808	Departs		
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Athenet	Property		Ticout bearing in	# # NY () YH	

General:

- Name. Enter a name for the product. The name will be visible to customers, and should therefore reflect the nature of the product. For example Standard Season Ticket 14/15
- **Translated Name.** Used for translated implementations. For more information <u>see the Set up for Multi</u> <u>Lingual using the Translation Field</u>.
- **Description.** Enter a description of the product. The Description field can be set as a translatable string if desired (if used in the Web UI). <u>See the Set up for Multi Lingual using the Translation and Description Field</u> for further information.
- **Type.** Use the drop-down list to select the **type** of product, this being a **Series.**
- **Is Anonymous.** Select **Yes** if the purchaser is not required to provide a name when buying the product. The channel must also be set to allow the sale of anonymous products.
- Match Sit Anywhere. Used for when a customer requests a fixture ticket purchased as part of a series to be reprinted.
- Payable By. If the product can be paid for using direct debit select the direct debit payment method.
- VAT Code. Use the lookup to select the correct tax code for the Bookable Products form.
- External Product ID. Can be used to link the Bookable Product to an external list of products.
- **Sequence.** Enter a sequence number for the product. The sequence number is used to determine the order in which products are displayed in the POS and Web channels.
- **Beneficiary Requirement.** Use the drop-down list to select if a customer's name is required when the product is purchased, for example the details of the season ticket holder. Select from the following options:
  - i. Not Required. The customer will not be asked for their name and contact details.
  - ii. **Requested.** The customer will be asked for their name and contact details, but can skip this option if they do not wish to provide their details.
  - iii. **Required.** The customer must provide their name and contact details. This option should be selected when setting up a season ticket or membership product.
- **Report Category.** Used for reporting purposes to categorise the products sold through Green 4 Ticketing.
- **Code.** Utilised for Access Control set up.
- Available Offline. Select Yes if the Bookable Product is to be available for purchase through the offline POS. This option cannot be used for products that require capacity to be monitored.



**Referring Entities:** 

- Bookable Resource. The Bookable Resource selected will determine which seats are available to the customer to purchase (for example, standard or hospitality). Select the Look Up icon alongside the field. The Look Up Records dialog will be displayed. Highlight and add the appropriate Bookable Resource. If the required bookable resource is not available contact your system administrator.
- Series. Use the Look Up tool to select the relevant Series that was previously created in step 3
- **Category.** Use the Look Up dialog to select the product category. The category is used to group products, for example into tickets, food, etc. The categories are used by the price list and channel editors.



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

- d) Once the details are complete select **Save** on the ribbon.
- e) Next, it is necessary to indicate which channels the product can be bought via. To set the Channels carry out the following:
  - Select Channels in the Form Navigation area.
  - The channels that have been set up during the configuration on your system will be listed. Select the checkbox alongside each channel through which the product will be sold, for example POS and Web.
  - Select **Save** on the ribbon.
- f) Next, it is necessary to identify the Product Variants and Prices:
  - Select Variants & Pricing in the Form Navigation area.
  - To select a variant, in the drop-down list on the left hand side (highlighted below), select the appropriate option. All of the variants available in your system will be listed. If you have categorised the variants they will displayed in the relevant categories.
  - Select the green cross alongside the variant name to add.



Save & New Save & Deactivate Close & Delete Save	Sharing - Copy a Link Collaborate Process Data
Information General Channels	Bookable Product test
Variants & Pricing Bowling Notes Related	Variants & Pricing     Mandatory     Mandatory
Common     Activities     Closed Activities     Audit History     Audit History	Variant

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



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

To enter price information for the product, select the relevant Variant Price List from the drop down at the top of the Variants & Pricing section (highlighted below). A Channel Price List must have been created in <a href="Step 2">Step 2</a> that has both the Channels and Channel Price List selected here linked to it.

ariants & Pricing				
	Not for Sale	Mandatory Varians	Match Day NEW	
East 2013 (Adult Season)				2
East 2013 (Junior Season)				$\lambda$
East 2013 (Senior Season)				Existing Variant Price Lists
East 2013 (Student Season)				
East Stand 2013 (Former Players Season)				

- Enter the pricing (peak and off peak) information for each of the variants that are to be included on the price list. The peak and off peak price should be the same.
- Repeat this process for each price list used to govern the pricing of the selected product.
- g) Once the pricing details are complete select **Save & Close** on the ribbon to save the product.

## SERIES ON SALE CHECK LIST

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

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



## **EXAMPLES: USING SALES PLANS TO SET UP A SERIES AND FIXTURES**

The examples included below cover the common scenarios we are likely to encounter in a sports environment.

### Pricing Regimes For Home Fixtures- Example 1

The following example illustrates how to set up the following pricing regime for home fixtures:

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

#### All events can be linked to use the same sales plan, providing they have the same pricing structure and regime.

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

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

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

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

- c. POS Event day
- d. Web Standard Pricing
- 5. For the price lists to come into force at the correct times, it is important to set the relative on/off sale dates as follows:

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

- 6. Once the channel price lists are set up select **Save & Close** on the Sales Plan ribbon.
- 7. The Lookup Records dialog will be displayed. Select **OK** to continue.
- 8. As you add fixtures to the existing series, providing the fixture is linked to the existing sales plan, the pricing regime set up for the initial fixture will be followed for all fixtures. So in the example above the day before each fixture web sales for the fixture will stop.

## Season Ticket Pricing Using Sales Plans – Example 1

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

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

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

- Variant Price Lists:

- Early bird pricing
- Standard pricing
- Channels:
  - Web
  - POS
- Series current season
- Bookable Product at least one series type product with variants and channels set. This should be linked to the current series.

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

1. Open the series details. Click the lookup button alongside the Sales Plan field. The lookup records dialog will be displayed. Select **New**.

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- 2. A blank sales plan form will be displayed. Complete the following details:
  - a. Name. Enter a name for the sales plan. For example Season 14/15.
  - b. Sales Plan Type. Select Series from the drop-down list.
- 3. Select **Save** on the ribbon.
- 4. Next create the channel price lists linked to the sales plan. You will need to create a channel price list for each channel variant price list combination. Therefore in this example you will need to create the following channel price lists:
  - a. POS Early Bird
  - b. POS Standard Pricing
  - c. Web Early Bird
  - d. Web Standard Pricing
- 5. For the price lists to come into force at the correct times, it is important to set the relative on/off sale dates as follows:

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



- 6. Once the channel price lists are set up select **Save & Close** on the Sales Plan ribbon.
- 7. The Lookup Records dialog will be displayed. Select **OK** to continue.

## Season Ticket Pricing Using Sales Plans – Example 2

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

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

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

- Variant Price Lists:
  - Standard pricing
- Channels:
  - Web
  - POS
- Series current season
- Bookable Product at least one series type product with variants and channels set. This should be linked to the current series.

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

- 1. Open the series details. Click the lookup button alongside the Sales Plan field. The lookup records dialog will be displayed. Select **New**.
- 2. A blank sales plan form will be displayed. Complete the following details:
  - a. Name. Enter a name for the sales plan. For example Season 14/15.
  - b. Sales Plan Type. Select Series from the drop-down list.
- 3. Select **Save** on the ribbon.
- 4. Next create the channel price lists linked to the sales plan. You will need to create a channel price list for each channel variant price list discount combination. Therefore in this example you will need to create the following channel price lists:
  - a. POS Standard Pricing Discount Applies
  - b. POS Standard Pricing No Discount
  - c. Web Standard Pricing Discount Applies
  - d. Web Standard Pricing No Discount
- 5. For the price lists to come into force at the correct times, it is important to set the relative on/off sale dates as follows:
- 6.



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

- 7. Once the channel price lists are set up select **Save & Close** on the Sales Plan ribbon.
- 8. The Lookup Records dialog will be displayed. Select **OK** to continue.

## Season Ticket Pricing Using sales Plans – Example 3

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

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

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

- Variant Price Lists:
  - Standard pricing
- Channels:
  - Web
  - POS
- Series current season



- Bookable Product at least one series type product with variants and channels set. This should be linked to the current series
- Marketing list all existing season ticket holders must be added to the marketing list

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

- 1. Open the series details. Click the lookup button alongside the Sales Plan field. The lookup records dialog will be displayed. Select **New**.
- 2. A blank sales plan form will be displayed. Complete the following details:
  - a. Name. Enter a name for the sales plan. For example Season 14/15.
  - b. Sales Plan Type. Select Series from the drop-down list.
- 3. Select **Save** on the ribbon.

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



Standard Discount Applies				
Web - Standard Pricing – No Discount	60	-100		

- 4. Next create the channel price lists linked to the sales plan. You will need to create a channel price list for each channel variant price list discount combination. Therefore in this example you will need to create the following channel price lists:
  - a. POS Standard Pricing STH Discount Applies
  - b. POS Standard Pricing Standard Discount Applies
  - c. POS Standard Pricing No Discount
  - d. Web Standard Pricing STH Discount Applies
  - e. Web Standard Pricing Standard Discount Applies
  - f. Web Standard Pricing No Discount
- 5. For the price lists to come into force at the correct times, it is important to set the relative on/off sale dates as follows:
- 6. Once the channel price lists are set up select **Save & Close** on the Sales Plan ribbon.
- 7. The Lookup Records dialog will be displayed. Select **OK** to continue.

# **3.7. SETTING UP AWAY FIXTURES AND TRAVEL PRODUCTS**

## **THE PROCESS**

The following describes how to set up an away venue before being able to place away tickets on sale. The same method can be used to set up away travel, the only difference being that an alternative resource will need to be set up to represent the capacity of the coach.

To set up the venue for an away fixture carry out the following process:



## **STEP 1: CREATING AN AWAY BOOKABLE RESOURCES**

The Bookable Resources entity is used to represent the ticket types that you are selling through the Green 4 Ticketing. This would be your Away Match. New Bookable Resource must be created for each Away Fixture that is created. To create a Bookable Resource record:

- a) In the CRM Navigation Panel select Venue Management followed by Bookable Resources.
- b) The Bookable Resource list view will be displayed:



- c) Select **New** on the ribbon (highlighted above).
- d) A blank Bookable Resource form will be displayed. Complete the following details:
  - Name. Enter the name of the resource, for example Away Match.
  - Allocate Seats. Set to No.





**Note.** All other fields in the Bookable Resource form are not required when setting up an Away Venue.

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

#### **STEP 2: CREATING AN AWAY VENUE**



The venue created during this step can be reused for all away fixtures, and therefore should only be created once. To create a venue, carry out the following:

a) Select **Venues** on the **Venue Management** tab. A list of existing venues that meet the current view criteria will be displayed.

New Edit X Delete -	E-mail a Link -	Advan Filos	
Records	1	Date	
Venue Mana 🙆 📿 -	Venues Active Venues -		
Payment Mandates     Payment Methods     Payment Schedules     Referred from options     Seat Classes     Terminals     Venues     Zonal Updates     Zones     Reservation Products	Name	Skidata Install N	
	Away Coach		
	Away Foctures		
	Away Stadia		
	Away Stadiums		
	Away Venue		
	Edan Stadium	2	
	Green 4 Training		
	Green4 Stadium	2	
Loyalty	JB Test Stadium		
Bookings Product Management	W Away Stadia		
	MR Test Venue		
	TTPC		
Venue Management	Southend	-1	
22 3 24	Snort 5		

b) Select New on the ribbon. A blank venue form will be displayed.

Venue New		Versies 👻 🔶
4 General		
Name *		, i i i i i i i i i i i i i i i i i i i
Skidata Install No.	Skidata Org	
Destination Folder		
Latitude	Longitude	



- c) Complete the following details:
  - Name. Enter a name for the venue, for example Away Stadium.
  - As the Away Game tickets are issued by the home team, the following access control fields should not have to be completed.
    - i. Skidata Install No.
    - ii. Skidata Org.
    - iii. Destination Folder.
    - iv. Latitude.
    - v. Longitude.
- d) Once the details are complete select **Save** on the ribbon.

#### **STEP 3: CREATING A BLOCK TO REPRESENT THE AWAY CAPACITY**



For each away fixture, it will be necessary to create a new block linked to the Away Stadium venue. The block will represent the capacity available for purchase. To create a block, carry out the following:

a) With the Away Stadium venue open in the form view, select **Blocks** in the Navigation area.

free - Venue Add Curt	i Liet Rook : Biocky	Microsoft Dynamics CRM			CRM2011 Administrator 👻 StadumTett 💩		
And New Add Dicting Date	Deactivate Dennia biasis	MarMeye 🕲 Copy a Link T E-mail a Link	Titer	Set As Default	Rat Stat	Run Report. Basis	
Bycon	Internet and the second	California	Current View	- West	Prasme	Clyine -	
la Seneral	Away Venue					Verses	- + 4
Related	a Block Associated View *				Search for records		
Common	Nene +		Venue	Area	Seated	Rint Seat	Set N C
Audit History	Avey GM Careut		Avery Veniae		No		1 Lefits
dincha:	Away GM Consult 2 Away GM Consult 3		Away Venue Away Venue		No No		1 Left to
Venue Configurations							1 Left to
Series	Aver GM Carout 4		Away Venue		Nitt		1 Left to
A Flotures	Away GM Consult 5		Away Versia	Ri	No		1 Left to
4 Processes	www.GV/Consult 6		Away Venue	÷	No		1 Left to
Gi Wiekfows	Aver GM Censuit 7		Avey Venue	6	No		1 Left to
Dalog Sessions	Away Match Block		Away Venue		No		1 cett to
	58 Away Bock 1		Away Venue		No		1 Left to
	56 Away Block 2	58 Away Stock 2		Away Venus			1 Left to
	SB Away Block 3	58 Away Block 3		Away Venue			1 ceft to
	58 Away Block 4		Avay Venue		No		1 Left to
	58 Away Block 5		Avey Venue	1	No		1 Left to
	SB Away Coach 1		Away Venue	Fil.	No		1 cetto
	58 Away Coach 2		Augy Venue	1	No		1 Left to
	<						>

b) Select Add New Block on the ribbon.



Fiet Stock Add Centre	riux (	Microsoft Dynamics CRM				CRM2011 Administrator Stadium Test		
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Common Name <sup>™</sup> Audit History Ares     Bock Seat Classes	55 Away Block 1		Venue Radius Seats	Away Venue 100,000 10		1		
Block Class Use Set Allocations Venue Configuration  Processes	Seated Seat Number Direction	No      Yes     Let to Right	V	Picat Seat 25g 2ag Start	1		V	
Ge Workflows	Iprore Gape Skitate Area Code	Ne O Yes		Unwarted Capacity Use Row Offsets	105 () No () Yes			
Seat Lapurd [No seat (whit	Sprenor Message							
	No seat (shite)	<b></b>						,

- c) A blank form will be displayed. Complete the following details:
  - Name. Enter a name for the block, for example Away Block.
  - Venue. The name of the venue will be automatically displayed.
  - Area. Set up is not required for an Away venue.
  - **Radius.** Set up is not required for an Away venue.
  - **Rows.** Set up is not required for an Away venue.
  - Seats. Set up is not required for an Away venue.
  - Seated. Set to No.
  - First Seat. Set up is not required for an Away venue.
  - Seat Number Direction. Set up is not required for an Away venue.
  - Zig Zag Start. Set up is not required for an Away venue.
  - Ignore Gaps. Set to No
  - Unseated Capacity. Set to away capacity e.g. 200.
  - Skidata Area Code. Set up is not required for an Away venue.
  - Use Row Offset. Set to No.
  - **SVG.** Set up is not required for an Away venue.
  - **Sponsor Message.** Set up is not required for an Away venue.
  - Seat Layout. This area does not need to be completed.


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

### **STEP 4: CREATING AN AWAY VENUE CONFIGURATION**



The Venue Configuration created during this step can be reused for all away fixtures, and therefore should only be created once. To create a Venue Configuration, carry out the following:

a) With the Away Stadium venue open in the form view, select Venue Configurations in the Form Navigation area.

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b) Select Add New Venue Configuration on the ribbon.

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- c) A blank form will be displayed. Complete the following details:
  - Name. Enter a name for the Venue Configuration, for example Away Stadium.



- Venue. The venue will be automatically filled in.
- Parent Venue Config. Use the Find button to search for the parent configuration file (if applicable).
- **Print Tickets for Venue.** This can be used to prevent tickets being printed for a particular venue e.g. an away venue. To prevent tickets being printed for an away venue the attribute must be selected as **No**.
- Allow Print at Home. This defines if the print at home option is allowed for the venue configuration, it should be selected as **No** when creating an away venue configuration.
- Away Venue. Select Yes this will allow the Away Venue to be configured.
- **Primary Provider.** Set up is not required for an Away venue.
- **Perimeter Provider.** Set up is not required for an Away venue.
- d) Once the details are complete select **Save** on the ribbon.

### **STEP 5: CREATE A VENUE CONFIGURATION BLOCK**



For each block created it is necessary to create a venue configuration block which will link the block to the away stadium venue configuration. It will be necessary to create a venue configuration block for each away fixture. To create a venue configuration block:

a) With the Away venue configuration open in the form view, select **Venue Configuration Blocks** in the form navigation area.

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b) Select Add New Venue Configuration Block on the ribbon. A blank form will be displayed. Complete the following details:



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- Name. Enter a name for the venue configuration block. For example enter the name of the away stadium.
- Venue Configuration. The venue configuration will be automatically filled in
- **Block.** Use the Lookup Records dialog to select the correct away block.
- Seat Class. Leave blank.
- **Bookable Resource.** Use the Lookup Records dialog to select the appropriate Away bookable resource, created earlier.
- Sequence. Leave this field blank.
- c) Once the details are complete select **Save & Close** on the ribbon.
- d) The Lookup Records dialog will be redisplayed with the new resource highlighted. Select **OK** to return to the Venue Configuration Block record.
- e) Once the details are complete select **Save & Close** on the ribbon.



# **STEP 6: SET UP YOUR AWAY SERIES AND FIXTURE**



Once the venue has been set up for your away fixture, you can use near to the standard process for putting the fixture on sale as discussed previously in <u>Section 3.5. Placing a new fixture on sale</u>. However there are a number of fields that need to be selected that differ to the standard process for placing Away fixtures on sale. The table below gives a brief outline on how to put Away fixtures on sale whilst highlighting the fields that must be completed to place an Away fixture on sale.

It will be assumed that you have previously set up the following items:

- **Channels** ensure that the **Show Stadium Options** has been set to **'Yes'** to show the options for Fixtures and Series on the Epos home screen.
- Variant Types. (Section 3.2).
- Variant Price List. (Section 3.3).

Task	Comments
Step 1: Sales Plans	A new fixture type Sales Plan will need to be created for Away fixtures, all away fixtures can be included in this Sales Plan.
Step 2: Channel Price List	The Channel Price List is linked to your Away Sales Plan. You will need to create a channel price list from your Sales Plan for each channel – variant price list combination. A new Channel Price List will be needed for each away fixture that you set up, this is to allow for differing away fixture on/off sale dates and ticket pricing.
Step 3: Fixture	<ul> <li>For each away fixture, create a fixture record.</li> <li><u>Please Note. Unlike a standard home fixture the following fields must be</u> <u>completed for an Away fixture:</u> <ul> <li>Record Away Ticket Details. Select Yes.</li> <li>Venue Configuration. Select the Away Venue Configuration that you have previously created.</li> <li>Sales Plan. Use the Look Up to select the appropriate Fixture type Sales Plan created previously.</li> </ul></li></ul>
Step 4: Series	<ul> <li>A new series must be created to hold all the away fixtures. For example it could be named Away Fixtures 2014/15.</li> <li>Ensure that the following are completed: <ul> <li>Venue: Enter the Away Venue previously completed.</li> <li>Venue Configuration: Enter the Away Venue Configuration previously completed</li> </ul> </li> </ul>



Task	Comments
	<ul> <li>Select Seats: Set to No</li> <li>Series Start and End Date: Enter appropriate dates.</li> </ul>
Step 5: Bookable Product – Product Details	<ul> <li>Create a fixture type Bookable Product to represent the tickets on sale for away fixtures. A Bookable Product will need creating for each separate Away Match. Ensure the following are completed:</li> <li>Type: Select Fixtures.</li> <li>Bookable Resource: Set to the appropriate Away Bookable Resource created previously.</li> <li>Series: Set to the Away Series previously created.</li> <li>Make sure that that Beneficiary Requirement set to Required as the away ticket information is captured against a Beneficiary in the POS.</li> </ul>
Bookable Product – Channels	Using the Bookable Product form, select the channels the away product will be sold via.
Bookable Product – Variants	Using the Bookable Product form, select the variant types for the away product e.g. Adult, Senior, and Junior. Where possible reuse the variants available in the system
Bookable Product – Pricing	Using the Bookable Product form, enter the price details for away product. It is recommended that a new Variant Price List is created for each away fixture.



**Note:** Coach travel is set up in the same way as the fixture using an alternative resource to represent the capacity of the coach.



### Away Fixture Pricing- Example 1

The following example illustrates how to set up the following pricing regime for away fixtures:

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

As pricing and products for away fixtures is governed by the host club, it will be invariably necessary to create a new sales plan for each away fixture.

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

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

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

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



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

- 6. Once the channel price lists are set up select **Save & Close** on the Sales Plan ribbon.
- 7. The Lookup Records dialog will be displayed. Select **OK** to continue.
- 8. This process will need to be repeated for each away fixture as it is created to allow for different product sets and prices.

### STEP 7. CAPTURING AWAY TICKET INFORMATION IN THE POS

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

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

### Setting up Away Block

To do this, complete the following:

- a) With the Away fixture form open, select Away Blocks in the navigation area.
- b) Select Add New Away Blocks in the ribbon.

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c) Capture the Away Block name for the Away Fixture.



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### Setting up Fields in POS

a) Select the **Channel Price Lists** entity in the form navigation area of the Fixture Form.

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A Reserved Bookings	1-1 of 1 (D selected)				H 4 Page 1 P

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

 $g4b\_TicketReferenceNumber,g4b\_awayblockid,g4b\_row,g4b\_seat,g4b\_SeatPostfix$ 



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Related	Refund Authorisation Required	O No	Yes	Validate Delivery Product	No	() Yes		
Common	Contact							
Activities	Allow Bulk Email	O No	• Yes	Collect Referred From Attribute	No	O Yes		
Audit History	Terms Acceptance Required Behaviours	O No	⊖ Yes	Activation Required	No	() Yes		
Additional Charges	Offer Additional Products	() No	• Yes	Return Stock Levels	O No	O Yes		
Channel Sale Dates Channel Boards	Do not create stock transactions	() No	⊖ Yes					
Booking Questions	Away Tickets							
Payment Methods     Operator Groups	Away Ticket Details To Record	g4b_TicketF	leferenceNumber,g4b_awayblockid,g4l	b_rc				

- d) This will ensure the Away Block names are contained in a drop down list when selecting Beneficiaries in the POS
  - g4b\_TicketReferenceNumber Reference No. Field in the POS
  - **g4b\_awayblockid** Block Field, note by setting up the Block as above the block name will be contained in a drop down on the POS
  - g4b\_row Row Field in the POS
  - g4b\_seat Seat Field in the POS
  - g4b\_SeatPostfix Seat Letter Field in the POS

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# **3.8. SETTING UP STOCK BOOKABLE PRODUCTS**

The sale of stock products (e.g. guide books) through Green 4 Ticketing relies upon a number of entities within the system, all of which must be correctly configured in order to place the product on sale at the correct price. This section covers the sale of basic stock products and does not describe in detail the Green 4 Food & Beverage offering.

The flow for putting a stock product on sale is similar to that followed when putting on sale fixture and series tickets.

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

- **Channels.** The channels the products will be sold via.
- Variant Types. The divisions of the product available. For example for merchandise such as a cuddly toy the variant type would be "each", whereas for drinks it may be "pint" and "half". Variant types should be reused where possible. To create a Variant Type see <u>Section 3.2.</u>
- Variant Price List. The Variant Price List is selected in the Variant and Pricing section of the Bookable Product form, this being where the pricing of the product is entered into. The Variant Price Lists are also subsequently linked to the channel using the channel price list entity. It is recommended that you have a separate variant price list for use with stock products. To create a new Variant Price List see <u>Section 3.3.</u>
- Sales Plan. A default sales plan of type of Other linked to the company details needs to be set up. This sales plan is used for all stock, scheduled and auto-scheduled products.

### **STEP 1: SET UP YOUR CHANNEL PRICE LISTS**

Channel prices lists are used to link a variant price list to a channel. If you wish the prices entered on a variant price list to be charged then you must link the price list to the channel. Multiple price lists can be in use simultaneously.

The channel price list can be reused; therefore you may only need to create the channel price list once for each variant price list – channel combination.

To set up a channel price list:

- a) On the CRM navigation panel, select Sales Plan on the Product Management tab.
- b) A list of sales plans matching the view criteria will be displayed.
- c) Open the Default Sales Plan (the default sales plan should be linked to the company details record in CRM).
- d) Select Channel Price List in the form navigation area.
- e) A list of channel price lists that have been previously linked to the variant price list will be shown. Select **Add New Channel Price List** on the ribbon.
- f) A blank channel price list form will be displayed. Complete the following details:
  - Name. The name of the channel price list.
  - **Channel.** Select the Look Up icon alongside the field. The Look Up Records dialog will be displayed. Select the appropriate channel before clicking **OK** to continue.
  - **On Sale Date.** Enter the date and time when the price list will be available for use by the channel. An On Sale Date must be entered when creating a price list for stock products.



- Marketing List. Select the marketing list the channel price list relates to. If a marketing list is applied to a channel price list, only contacts that have been added to the marketing list will use the channel price list. This option can be used to give beneficial prices to people that have previously bought a particular product, for example a membership product. Preferential pricing can either be driven by the use of a different variant price list, or by entering a discount percent.
- **Discount Percent.** If using a discount enter the percentage discount offered to users of the channel price list. This option can be used in conjunction with a marketing list to offer members of the marketing list a discount. It is also possible to enter a discount percent to a channel price list that does not have a marketing list, all product sold using the channel price list will then be subject to the entered discount.
- **Discount Category.** If using a discount use the lookup to select the product category the discount percent will be applied to. If a product category is not entered, the discount percent will be applied to all products.
- Variant Price List. Use the Lookup Records dialog to select the appropriate price list. The price list that you are to use for the bookable product should be selected.
- **Off Sale Date.** Enter the date and time when the price list will stop being available for use by the channel. An Off Sale Date must be entered when creating a price list for stock products.
- Max Quantity. This option, when used in conjunction with a marketing list can be used to limit the number of a selected product a customer can purchase. This option can be used to limit the number of products a customer can buy at a preferential rate. Alternatively this option can be used to limit the number of tickets a member can purchase before general release.
- **Discount Rounding.** Enter the discount rounding i.e. to the nearest penny, 10p, pound. If a value is not entered the system will default to rounding to a penny.



**Note:** All other fields in the Channel Price List form that have not been described above do not need to be completed/changed.

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

A channel price list will need to be created for each Variant Price List – Channel combination created.

### **STEP 2: CREATE THE BOOKABALE PRODUCT**

The Bookable Product entity is used to represent products that are sold through the Green 4 Ticketing application, for example match tickets, season tickets and merchandise. For each stock product that you are selling through the system you must create a **stock type** bookable product.

To create a stock bookable product:

- a) On the CRM navigation panel, select Bookable Products on the Product Management tab.
- b) A list of bookable products that match the current view criteria will be displayed. Select **New** on the ribbon.



c) A blank bookable product form will be displayed. For a stock product it is necessary to complete the following *Product Details*:

General:

- **Name.** Enter a name for the product. The name will be visible to customers, and should therefore reflect the nature of the product.
- **Translated Name.** Used for translated implementations. See <u>Set up for Multi Lingual using the Translation</u> <u>Field</u> for more information.
- **Description.** Enter a description of the product. The Description field can be set as a translatable string if desired (if used in the Web UI). <u>See the Set up for Multi Lingual using the Translation and Description Field</u> for further information.
- **Type.** Use the drop-down list to select the type of product. In this instance select **Stock** from the list of available values.
- **Is Anonymous.** Select **Yes** if the purchaser is not required to provide a name when buying the product. The channel must also be set to allow the sale of anonymous products.
- External Product ID. Can be used to link the bookable product to an external list of products.
- **Sequence.** Enter a sequence number for the product. The sequence number is used to determine the order in which products are displayed in the POS and Web channels.
- **Beneficiary Requirement.** Use the drop-down list to select if a customer's name is required when the product is purchased, for example the details of the season ticket holder. Select from the following options:
  - i. Not Required. The customer will not be asked for their name and contact details.



- ii. **Requested.** The customer will be asked for their name and contact details, but can skip this option if they do not wish to provide their details.
- iii. **Required.** The customer must provide their name and contact details. This option should be selected when setting up a season ticket or membership product.
- **Report Category.** Used for reporting purposes to categorise the products sold through Green 4 Ticketing.
- Available Offline. Select Yes if the bookable product is to be available for purchase through the offline EPOS. This option cannot be used for products that require capacity to be monitored.

### Referring Entities:

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

### Time Settings:

- Available Date From. Enter the date the product goes on sale.
- Available Date To. Enter the date the product is removed from sale.
- Available Time From. Enter the time the product goes on sale.
- Available Time To. Enter the time the product is removed from sale.



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

- d) Once the details are complete select **Save** on the ribbon.
- e) Next, it is necessary to indicate which channels the product can be bought via. To set the *Channels* carry out the following:
  - Select **Channels** in the Form Navigation area.
  - The channels that have been set up during the configuration on your system will be listed. Select the checkbox alongside each channel through which the product will be sold.
  - Select **Save** on the ribbon.
- f) Next, it is necessary to identify the Product Variants and Prices:
  - Select Variants & Pricing in the Form Navigation area.

• To select a variant, in the drop-down list on the left hand side (highlighted below), select the appropriate option. All of the variants available in your system will be listed. If you have categorised the variants they will displayed in the relevant categories.

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Common     Activities     Closed Activities     Audit History     Additional Products	Variant

- Repeat until all variants are listed. If you need to remove a variant, click the red minus sign alongside the variant.
- To enter price information for the product, select the relevant Variant Price List from the drop down at the top of the Variants & Pricing section (highlighted below):

Variants & Pricing			ſ	Decision of	V	1	~
	Code	Not for Sale	Mandatory Variant	Peak Price	Off Peak Price		
Mens T Shirt (Large)		0		40.00	43.00		
Mens T Shirt (Medium)				40.00	40.00		
Mens T Shirt (Small)	1			40.00	40.00		

- Enter the pricing (peak and off peak) information for each of the variants that are to be included on the price list. The value entered into the Peak and Off Peak price field should be the same for this type of product.
- Repeat this process for each price list used to govern the pricing of the selected product.

Once the pricing details are complete select Save & Close on the ribbon to save the product

# STOCK PRODUCT ON-SALE CHECK LIST

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

Task	Completed?	Comments
Created a channel price list		The channel price list should be linked to the default sales plan The channel price list should link the channels to the variant price list Ensure the channel price list dates are valid.
Create a stock bookable product		Ensure the Available Date From and To dates are valid.
Assigned channels to the bookable product		Ensure the relevant channel check boxes are ticked.
Assigned variants to the bookable product		Ensure the variants are listed.
Assigned prices to the bookable product		Prices should be added to an active variant price list.



### **UPSELLING PRODUCTS (ADDITIONAL PRODUCTS)**

Using the additional products functionality in Green 4 Ticketing it is possible to present the user with a list of upsell products at the point when they either add a product to the shopping cart, or when they select to pay for their goods. For example you can upsell a match programme when a customer purchases a match ticket.

To use additional products:

- a) In the CRM Navigation Panel select Product Management followed by Bookable Products.
- b) The Bookable Products list view will be displayed.
- c) Double-click over the Bookable Product that you wish to link upsell products to.
- d) The Bookable Product will be opened in the form view.
- e) In the Form Navigation Panel select Additional Products.



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

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- f) Select Add New Additional Product on the ribbon.
- g) A blank Additional Product form will be displayed:

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- h) Complete the following details:
  - Name. Enter a name for the additional product.
  - Additional Proto Product. If applicable, use the Look Up Records dialog to select the upsell product. When this option is entered the additional product chosen here appears whenever the Bookable Product is added to the cart.
  - **Analysis Category.** If applicable, select an Analysis Category. When this option is entered the additional product would appear for each product that is part of the selected category.
  - Bookable Product. The Bookable Product field will be pre-populated.
  - Behaviour. Select when the additional product will be offered to the customer.
  - **Proto Product.** If applicable, select a Proto Product. This allows you to link an additional product to a particular product variant.
  - Quantity Behaviour. Enter the number of upsell products that will be offered. Select from Per Person, Per Unit or Per Booking.
- i) Once the details are complete, select Save & Close on the ribbon.

Having set up the upsell products it is necessary to select which channels will allow the upsell of additional products. To set a channel to allow the upsell of additional products carry out the following:

- a) In the CRM Navigation Panel select Venue Management followed by Channels.
- b) The Channels list view will be displayed.
- c) Open the appropriate channel in the form view.
- d) Set the field Offer Additional Products field to Yes.



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



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

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

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

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



# **3.9. SETTING UP AUTO-SCHEDULED BOOKABLE PRODUCTS**

Auto-Scheduled Bookable Products are those that the administrator has no control of in terms of the times that the product is on sale. An Auto-Scheduled Bookable Product would be relevant to an activity that reoccurs periodically for example a guided tour. An Auto-Scheduled product could also be used to create a Dated Day Pass type product, where a specific date for the use of the pass is selected.

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

• **Channels.** The Channels the products will be sold via. **Please note** for Auto-Scheduled Products a field in the Channel form must be completed called **MonthsInTheFuture**. The fields must be entered with the number of months that the product is to be available for. For example, enter 12 for the product to be available for 12 months.

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

MonthsInTheFuture 12

- **Bookable Resource.** The bookable resource represents the capacity that bookable products "tap" into. The bookable resource must be added to a category. Multiple products can use the same bookable resource, for example if they share capacity.
- **Variant Types.** The divisions of the product available. For example for ice skating session the variant type may be adult, child, etc. Variant types should be reused where possible. To create a Variant Type see <u>Section 3.2.</u>
- Variant Price List. The Variant Price List is selected in the Variant and Pricing section of the Bookable Product form, this being where the pricing of the product is entered into. The Variant Price Lists are also subsequently linked to the channel using the channel price list entity. It is recommended that you have a separate variant price list for use with stock products. To create a new Variant Price List see <u>Section 3.3.</u>
- Sales Plan. A default sales plan of type of Other linked to the company details needs to be set up. This sales plan is used for all stock, scheduled and auto-scheduled products.

### **STEP 1: SET UP YOUR CHANNEL PRICE LISTS**

Channel prices lists are used to link a variant price list to a channel. If you wish the prices entered on a variant price list to be charged then you must link the price list to the channel. Multiple price lists can be in use simultaneously.

The channel price list can be reused; therefore you may only need to create the channel price list once for each variant price list – channel combination.

To set up a channel price list:

- a) On the CRM navigation panel, select Sales Plan on the Product Management tab.
- b) A list of sales plans matching the view criteria will be displayed.
- c) Open the Default Sales Plan (the default sales plan should be linked to the company details record in CRM).
- d) Select Channel Price List in the form navigation area.
- e) A list of channel price lists that have been previously linked to the variant price list will be shown. Select **Add New Channel Price List** on the ribbon.



Channel Price List New				Channel Price	Lints 👻 🛧
Name					
Channel			Variant Price List		
On Sale Date	10×	30	Off Sale Data		-
On Sale Days Before			On Sale Hours Before		
Off Sale Days Before			Off Sale Hours Before		
Activity Start Date	(RM)	M	Activity End Date		100
Marketing List			Max Quantity		
Discount Percent			Discount Rounding		
Discount Category					
Sequence					

f) A blank channel price list form will be displayed. Complete the following details:

- Name. The name of the channel price list.
- **Channel.** Select the Look Up icon alongside the field. The Look Up Records dialog will be displayed. Select the appropriate channel before clicking **OK** to continue.
- On Sale Date. Enter the date and time when the price list will be available for use by the channel.
- Activity Start Date. This option is used to control the use of channel price list against scheduled and auto scheduled products. Using this option you can control pricing based on when an activity is due to start, for example bring into force an alternative price list for activities running during school holidays.
- **Marketing List.** If applicable select the marketing list the channel price list relates to. If a marketing list is applied to a channel price list, only contacts that have been added to the marketing list will use the channel price list. This option can be used to give beneficial prices to people that have previously bought a particular product, for example a membership product. Preferential pricing can either be driven by the use of a different variant price list, or by entering a discount percent.
- Discount Percent. If using a discount enter the percentage discount offered to users of the channel price list. This option can be used in conjunction with a marketing list to offer members of the marketing list a discount. It is also possible to enter a discount percent to a channel price list that does not have a marketing list, all product sold using the channel price list will then be subject to the entered discount.
- **Discount Category.** If a discount is to be used select the lookup to choose the product category the discount percent will be applied to. If a product category is not entered, the discount percent will be applied to all products.
- Variant Price List. Use the Lookup Records dialog to select the appropriate price list. The price list that you have entered prices on for the bookable product should be selected.
- Off Sale Date. Enter the date and time when the price list will stop being available for use by the channel.



- Activity End Date. This option is used to control the use of channel price list against scheduled and auto scheduled products. Using this option you can control pricing based on when an activity is due to Start, for example bring into force an alternative price list for activities running during school holidays.
- Max Quantity. This option, when used in conjunction with a marketing list can be used to limit the number of a selected product a customer can purchase. This option can be used to limit the number of products a customer can buy at a preferential rate. Alternatively this option can be used to limit the number of tickets a member can purchase before general release.
- **Discount Rounding.** If a discount is to be used enter the discount rounding i.e. to the nearest penny, 10p, pound. If a value is not entered the system will default to rounding to a penny.



**Note.** All other fields in the Channel Price List form that have not been described above do not need to be completed/changed

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

A channel price list will need to be created for each Variant Price List – Channel combination created.



### **STEP 2: CREATE THE BOOKABLE PRODUCT**

The Bookable Product entity is used to represent products that are sold such as a guided tour or Dated Day Pass. For each Auto Scheduled product that you are selling through the system you must create an Auto Scheduled type Bookable Product.

To set up an Auto Scheduled Bookable Product:

- a) In the navigation area select Product Management followed by Bookable Products
- b) A list of Bookable Products will be displayed, in the ribbon select New.



c) A new Bookable Product Form will appear. Enter the following details:

File Bookable Product /	de cunomere					Stadium Demo 🚊
Save & New Save & Save & New Save & Close Save	Copy a tink	Num Start Workflow Dialog	Run Report -			
Information - General - Channels	I Dookab New	le Product	- SAI			Rockable Frainacts = 🕈
- Variants & Pricing - Bowling - Notes	4 General Referring Entitie	5				
Related	Bookable Resour	ve.		<u>1</u>	Category	
# Common	Coupon Type				Product Calendar Variant Type Category	
Audit History  Additional Products  Product Channels	Name * Translated Name					
Product Sessionx     Product Variants     Resource Types     Vermentinge	Description Type Availability	Stuck		~	Sequence Beneficiary Requirement	Not Required

General:

• **Name.** Enter a name for the product. The name will be visible to customers, and should therefore reflect the nature of the product.

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

**Referring Entities:** 

- **Bookable Resource.** An Auto Scheduled product must have a Bookable Resource as the product has to have a capacity. Use the lookup to find a relevant bookable resource or select **New** to create a new one. If creating a new Bookable Resource enter the following:
  - I. Name. Enter the name of the bookable resource.



II. **Capacity.** Enter the capacity of the bookable resource in terms of how many people it can hold. For example, how many people can use an ice rink at a set time.



**Note.** Many products can link into the same bookable resources. If two products do link into the same bookable resource i.e there is an ice skating rink with a capacity of 100 people but some of them have come for trained lessons whereas other have turned up on the day. Both of these products will use the same capacity, preventing over bookings from occurring.

- III. Category. Use the Lookup to select the category or select New to create a new category.
- IV. Leave all other fields blank.
- V. Select **Save and Close** on the ribbon and you will return to your Bookable product form.
- **Category.** Use the lookup to select the category of product or select **New** to create a new category.

• **Product Calendar.** Select the product calendar that will govern the on/off sale and peak times for the bookable product. See <u>Product Calendars</u> for more information on setting up product calendars.

Time Settings:

- Available Date From. Enter the date the product goes on sale.
- Available Time From. Enter the time the product goes on sale.
- **Duration.** Enter the duration of the session i.e. a tour may last 1 hour or a Dated Day Pass for 1 day.
- Available Date To. Enter the date the product is removed from sale.
- Available Time To. Enter the time the product is removed from sale.

• Interval. Enter how often the session reoccurs i.e a tour may reoccur every 15 minutes whilst a Dated Day pass may be available everyday so 1 day will need selecting.



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

- d) Next, it is necessary to indicate which channels the product can be bought via. Select **Save** in the ribbon. To set the Channels carry out the following:
  - Select **Channels** in the Form Navigation area.
  - The channels that have been set up during the configuration on your system will be listed. Select the checkbox alongside each channel through which the product will be sold, for example POS or Web.
  - Select **Save** on the ribbon.
- e) Next, it is necessary to identify the Product Variants and Prices:
  - Select Variants & Pricing in the Form Navigation area.

• To select a variant, in the drop-down list on the left hand side (highlighted below), select the appropriate option. All of the variants available in your system will be listed. If you have categorised the variants they will displayed in the relevant categories.

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ile Bookable Product Add	Customize	
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formation General Channels Variants & Pricing Bowling	Bookable Product     test     Variants & Pricing	
Notes elated Common Activities Closed Activities	Not for Sale Mandatory Variant	Type
Channels Variants & Pricing Bowling Notes elated	Variants & Pricing      Not for Sale     Variant	<u>_</u>

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



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

• To enter price information for the product, select the relevant Variant Price List from the drop down at the top of the Variants & Pricing section (highlighted below):

ariants & Pricing							1
				Eden - A	dmis: 🗸	 ~	
	Code	Not for Sale	Mandatory Variant	Peak Price	Off Peak Price		
Dated Admission (Adult)	abc1			20.00	20.00		
Dated Admission (Child)	abc2			15.00	15.00		

• Enter the pricing (peak and off peak) information for each of the variants that are to be included on the price list.



- Repeat this process for each price list used to govern the pricing of the selected product.
- f) Once the pricing details are complete select **Save & Close** on the ribbon to save the product.



**Note.** All other fields on the Bookable Product Form that have not been noted above do not need to be completed/changed.

### AUTO SCHEDULED PRODUCT ON SALE CHECK LIST

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

Task	Completed?	Comments
Created a channel price list		The channel price list should be linked to the default sales plan
		The channel price list should link the channels to the variant price list on which prices have been entered.
		Ensure the channel price list dates are valid.
Create an auto scheduled bookable product		Ensure the Available Date From and To dates are valid.
Assigned channels to the bookable product		Ensure the relevant channel check boxes are ticked.
Assigned variants to the bookable product		Ensure the variants are listed.



# **3.10. SETTING UP SCHEDULED BOOKABLE PRODUCTS**

Scheduled Bookable Products are those that the administrator has control off as they are scheduled for a certain date and time for an activity to take place within. This can be used for booking a lesson; for example a skiing lesson at a particular time. It can also be used for a session that is at certain time, take for example an ice skating session where the customer will pay to be on the ice rink for an hour long.

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

- Channels. The channels the products will be sold via.
- **Bookable Resource.** The bookable resource represents the capacity that bookable products "tap" into. The bookable resource must be added to a category. Multiple products can use the same bookable resource, for example if they share capacity.
- **Variant Types.** The divisions of the product available. For example for ice skating session the variant type may be adult, child, etc. Variant types should be reused where possible. To create a Variant Type see <u>Section 3.2.</u>
- Variant Price List. The Variant Price List is selected in the Variant and Pricing section of the Bookable Product form, this being where the pricing of the product is entered into. The Variant Price Lists are also subsequently linked to the channel using the channel price list entity. It is recommended that you have a separate variant price list for use with stock products. To create a new Variant Price List see <u>Section 3.3.</u>
- Sales Plan. A default sales plan of type of Other linked to the company details needs to be set up. This sales plan is used for all stock, scheduled and auto-scheduled products.

### **STEP 1: SET UP YOUR CHANNEL PRICE LISTS**

Channel prices lists are used to link a variant price list to a channel. If you wish the prices entered on a variant price list to be charged then you must link the price list to the channel. Multiple price lists can be in use simultaneously.

The channel price list can be reused; therefore you may only need to create the channel price list once for each variant price list – channel combination.

- a) To set up a channel price list:
- b) On the CRM navigation panel, select Sales Plan on the Product Management tab.
- c) A list of sales plans matching the view criteria will be displayed.
- d) Open the Default Sales Plan (the default sales plan should be linked to the company details record in CRM).
- e) Select Channel Price List in the form navigation area.
- f) A list of channel price lists that have been previously linked to the variant price list will be shown. Select **Add New Channel Price List** on the ribbon.
- g) A blank channel price list form will be displayed. Complete the following details:



Channel Price List New			Channel Price	Lints + +
Name -				_
Channel		Variant Price List		
On Sale Date	 10	Off Sale Date	le v	-
On Sale Days Before		On Sale Hours Before		
Off Sale Days Before	1	Off Sale Hours Before		
Activity Start Date	21	Activity End Date		In
Marketing List		Max Quantity		
Discount Percent		Discount Rounding		
Discount Category	1			
Sequence				

- Name. The name of the channel price list.
- **Channel.** Select the Look Up icon alongside the field. The Look Up Records dialog will be displayed. Select the appropriate channel before clicking **OK** to continue.
- On Sale Date. Enter the date and time when the price list will be available for use by the channel.
- Activity Start Date. This option is used to control the use of channel price list against scheduled and auto scheduled products. Using this option you can control pricing based on when an activity is due to start, for example bring into force an alternative price list for activities running during school holidays.
- **Marketing List.** If applicable select the marketing list the channel price list relates to. If a marketing list is applied to a channel price list, only contacts that have been added to the marketing list will use the channel price list. This option can be used to give beneficial prices to people that have previously bought a particular product, for example a membership product. Preferential pricing can either be driven by the use of a different variant price list, or by entering a discount percent.
- **Discount Percent.** If using a discount enter the percentage discount offered to users of the channel price list. This option can be used in conjunction with a marketing list to offer members of the marketing list a discount. It is also possible to enter a discount percent to a channel price list that does not have a marketing list, all product sold using the channel price list will then be subject to the entered discount.
- **Discount Category.** If a discount is to be used select the lookup to choose the product category the discount percent will be applied to. If a product category is not entered, the discount percent will be applied to all products.
- Variant Price List. Use the Lookup Records dialog to select the appropriate price list. The price list that you have entered prices on for the bookable product should be selected.
- Off Sale Date. Enter the date and time when the price list will stop being available for use by the channel.
- Activity End Date. This option is used to control the use of channel price list against scheduled and auto scheduled products. Using this option you can control pricing based on when an activity is due to Start, for example bring into force an alternative price list for activities running during school holidays.

• Max Quantity. This option, when used in conjunction with a marketing list can be used to limit the number of a selected product a customer can purchase. This option can be used to limit the number of products a customer can buy at a preferential rate. Alternatively this option can be used to limit the number of tickets a member can purchase before general release.

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• **Discount Rounding.** If a discount is to be used enter the discount rounding i.e. to the nearest penny, 10p, pound. If a value is not entered the system will default to rounding to a penny.



**Note.** All other fields in the Channel Price List form that have not been described above do not need to be completed/changed.

h) Once the details are complete select Save & Close on the ribbon.

A channel price list will need to be created for each Variant Price List – Channel combination created.

# **STEP 2: CREATE THE BOOKABLE PRODUCT**

The Bookable Product entity is used to represent products that are sold through the Green 4 Ticketing application, for example match tickets, season tickets and merchandise. For each scheduled product that you are selling through the system you must create a scheduled type bookable product.

To create a scheduled bookable product:

a) In the navigation area select **Product Management** followed by **Bookable Products.** 



- b) A list of Bookable Products will be displayed, in the ribbon select New.
- c) A new Bookable Product Form will appear. Enter the following:



File Bookable Product /	Add:	Cudomau						Stadium Demo 🚊
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Information General Channels		New	roduct					Rockuble Products = +
- Variants & Pricing - Bowling - Notes		d General Referring Entities						
Related		Bookable Resource				Category		
# Common		Series			1	Product Calendar		<b>1</b>
	^	Coupon Type				Variant Type Category		
Audit History		Name * Translated Name						
Product Channels Product Sessions		Description						
Product Variants		Тура	Stuck		¥	Sequence		
Resource Types		Availability				Beneficiary Requirement	Not Required	~

#### General:

- Name. This is the name of the bookable product.
- **Translated Name.** Used for translated implementations. See the set up for <u>Multi Lingual using the</u> <u>Translation Field</u> for more information.
- **Description.** Enter a description of the product. The Description field can be set as a translatable string if desired (if used in the Web UI). <u>See the Set up for Multi Lingual using the Translation and Description Field</u> for further information.
- Type. From the down menu select the Type as Scheduled.
- Is Single Booking. Select Yes if a single booking of the bookable product uses all available resource. For example you may have a private ski lesson option set up which can take up to 6 people. However a single booking of only 1 person will effectively block out the entire resource if this option is set to Yes.
- Is Anonymous. Select Yes if the purchaser is not required to provide a name when buying the product. The channel must also be set to allow the sale of anonymous products.
- External Product ID. Can be used to link the bookable product to an external list of products.
- **Sequence.** Enter a sequence number for the product. The sequence number is used to determine the order in which products are displayed in the POS and Web channels.
- **Beneficiary Requirement.** Use the drop-down list to select if a customer's name is required when the product is purchased, for example the details of the season ticket holder. Select from the following options:
  - i. Not Required. The customer will not be asked for their name and contact details.
  - ii. **Requested.** The customer will be asked for their name and contact details, but can skip this option if they do not wish to provide their details.



- iii. **Required.** The customer must provide their name and contact details. This option should be selected when setting up a season ticket or membership product.
- **Capacity.** If a capacity is entered it will only allow the bookable product to be sold up to this capacity regardless of the capacity of the underlying resource (it cannot sell beyond the capacity of the underlying resource). Using this option allows you to limit the number of spaces for a particular activity when sharing resources. For example ice skating lessons may only be allowed to take 20 spaces from the capacity of 100 available. In turn this will limit public skating to 80 spaces if the products share the same ice arena resource.
- Report Category. Used for reporting purposes to categorise the products sold through Green 4 Ticketing.
- Available Offline. Select Yes if the bookable product is to be available for purchase through the offline EPOS. This option cannot be used for products that require capacity to be monitored.

**Referring Entities:** 

- **Bookable Resource.** An Auto Scheduled product must have a Bookable Resource as the product has to have a capacity. Use the lookup to find a relevant bookable resource or select **New** to create a new one. If creating a new Bookable Resource enter the following:
- I. Name. Enter the name of the bookable resource.
- II. **Capacity.** Enter the capacity of the bookable resource in terms of how many people it can hold. For example, how many people can use an ice rink at a set time.



**Note.** Many products can link into the same bookable resources. If two products do link into the same bookable resource i.e there is an ice skating rink with a capacity of 100 people but some of them have come for trained lessons whereas other have turned up on the day. Both of these products will use the same capacity, preventing over bookings from occurring.

- III. Category. Use the Lookup to select the category or select New to create a new category.
- IV. Leave all other fields blank.
- V. Select **Save and Close** on the ribbon and you will return to your Bookable product form.
  - **Category.** Use the lookup to select the category of product or select New to create a new category.
  - **Product Calendar.** Select the product calendar that will govern the on/off sale and peak times for the bookable product. See <u>Product Calendars</u> for more information on setting up product calendars.

**Time Settings:** 

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



• Available Time To. Enter the time the product is removed from sale.



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

- d) Next, it is necessary to indicate which channels the product can be bought via. Select **Save** in the ribbon. To set the Channels carry out the following:
  - Select **Channels** in the Form Navigation area.
  - The channels that have been set up during the configuration on your system will be listed. Select the checkbox alongside each channel through which the product will be sold, for example POS or Web.
  - Select **Save** on the ribbon.
- e) Next, it is necessary to identify the Product Variants and Prices:
  - Select Variants & Pricing in the Form Navigation area.
  - To select a variant, in the drop-down list on the left hand side (highlighted below), select the appropriate option. All of the variants available in your system will be listed. If you have categorised the variants they will displayed in the relevant categories.
  - Select the green cross alongside the variant name to add.

File Bookable Product Add	d Customize
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Information General	Bookable Product test
Variants & Pricing     Bowling     Notes	Variants & Pricing  Mandatory
Related  Common  Activities  Closed Activities  Audit History  Additional Products	Not for Sale Variant

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





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

• To enter price information for the product, select the relevant Variant Price List from the drop down at the top of the Variants & Pricing section (highlighted below):

Bookable Product					Bookable Produ	ucts 👻 😫 🍝
• Variants & Pricing						^
	Code	Not for Sale	Mandatory	Eden Default	~	
Ice Skating (Each)	SKATE		Variant	Price		
	~	0				

- Enter the pricing (peak and off peak) information for each of the variants that are to be included on the price list.
- Repeat this process for each price list used to govern the pricing of the selected product.
- f) Once the pricing details are complete select **Save & Close** on the ribbon to save the product.
- g) Once the resources and products have been set up in the CRM system, the allocation of products against particular resources can now be carried out through the scheduler. This step is required prior to the selling of products through the POS.

### **STEP 3: SCHEDULE THE SESSIONS**

Sessions should be scheduled using the Green 4 Scheduler. When the scheduler is opened it will display in a calendar format as shown below. When a session is scheduled a new product session will be created in CRM.

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

- a) Select the resource in the column in the left hand side
- b) Double Click on a line when you want a scheduled product to start from (i.e. 9am)
- c) This will open up the session editor window:

		Edit	Session		
ession Details Co.	urse Details   Sessi	on Notes	Bookers Benefi	claries   Booker Commerci	to i
Product:					
	[		Search		
Start Time:	24/03/2014		09:00:00	<b>*</b>	
Duration:					
Instructor:	2			Conferred	
	1		Search	Clear	
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This is a course			-		10
This is a course Number of lessons	•				13
	•				
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Number of lessons	in course:		Search		

d) Fill in the following details:

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

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	Select F	roduct	- = ×
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4i day me	tings		
	Search Again	0K	Cancel

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

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

### SCHEDULED PRODUCT ON SALE CHECK LIST

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



Task	Completed?	Comments
Created a channel price list		The channel price list should be linked to the default sales plan
		The channel price list should link the channels to the variant price list
		Ensure the channel price list dates are valid.
Create a scheduled bookable product		Ensure the Available Date From and To dates are valid.
Assigned channels to the bookable product		Ensure the relevant channel check boxes are ticked.
Assigned variants to the bookable product		Ensure the variants are listed.
Scheduled Sessions		Ensure sessions are scheduled using the scheduler

### DELAYED PURCHASE OF SCHEDULED AND AUTO SCHEDULED PRODUCTS

It is possible to stop some products from being purchased within a predefined period. This has been developed to encourage revenue spend and also revenue protection, for example encouraging customers to pre-purchase a product on the web at a cheaper price, before it is available to purchase anywhere else at an increased standard price. Encouraging pre-purchase also helps with revenue protection, for example in Ten Pin Bowling, encouraging people to pre-purchase will help reduce the negative effect of a Sunny day on people attending indoor leisure activities. If the settings below are not set, then no exclusion will be implemented on the bookable product. To set up a period of exclusion it is necessary to make changes to the bookable product.

- a) In the Navigation bar select Product Management followed by Bookable Products.
- b) From the list of Active Bookable Products, select the scheduled or auto scheduled type Bookable Product that a period of exclusion is to be set up for.
- c) In the opened Bookable Product form find the **Delay Purchase** section, two fields appear in this section, enter the following:

Delay Purchase		
Delay Duration	Delay Duration Unit	Days

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

#### o Months

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

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d) Select Save and Close on the ribbon.

# SETTING UP RESERVE CAPACITY FOR SHEDULED AND AUTO-SCHEDULED PRODUCTS (REDUCING THE CAPACITY)

For both Scheduled and Auto-Scheduled products it is possible to reserve capacity and therefore **take out capacity** from your resource without any booking being taken, this may occur if you would like to decrease the number of bookings due to factors such as a lack of staff or maintenance work being carried out on a set day. For example you may need to block half an ice rink as there is a shortage of instructors or prevent any bookings for one day due to the ice rink being refrozen. To reserve capacity:

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

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c) In the ribbon select New Reserved Capacity, a new reserved capacity form will be displayed. Enter the following:



**Note.** You can alternatively get to the Reserved Capacity form by opening a **Bookable Resource** form and then selecting **Reserved Capacity** in the related Navigation area, before selecting **Add New Reserved Capacity**.

Reserved Capacity Ad	Customite		Stadium Demo d
Save & New Save & Save & New Save & Close Save	Copy a Link Kun State Ferrer - Coluborate Proces Data		
Information - General - Notes	Reserved Capacity New		[Reserved Capacity → ] + ] +
Related	* General		
Activities	Name * Bookable Resource Start Time	Received Count	
Processes     Workflows     Dialog Sessions	* Notes		


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

# SETTING UP NEGATIVE RESERVED CAPACITY FOR SHEDULED AND AUTO-SCHEDULED PRODUCTS (INCREASING THE CAPACITY)

This setting allows for the temporary **increase** in the capacity of a resource. On the bookable resource you wish to increase the capacity temporarily you will need to Create/Amend an associated Reserved Capacity and set the **Reserved Count** to a **negative number** and set the period when this will be effective by setting the start and end times. To create a Negative reserved Capacity:

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

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**Note.** You can alternatively get to the Reserved Capacity form by opening a **Bookable Resource** form and then selecting **Reserved Capacity** in the related Navigation area, before selecting **Add New Reserved Capacity**.

c) In the ribbon select **New Reserved Capacity**, a new reserved capacity form will be displayed or select an existing Reserved Capacity that you wish to amend. Enter the following:

4 General							
Name *	TEST 1						×
Bookable Resource	👌 Ski Slope		Q	Reserved Count	-10		
Start Time	01/10/2014	00:00	~	End Time	01/11/2014	00:00	~



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

# **3.11. SETTING UP PRODUCTS AS MEMBERSHIPS**

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

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

- Channels. The channels the products will be sold via.
- Variant Types. Variant Types describe the type of Bookable Product that you can purchase. For example there should be a Variant Type created for each of the different groups of people that a membership could be sold to such as Adult, Child, Student or OAP. Variant types should be reused where possible. To create a Variant Type see Section 3.2.
- Variant Price List. The Variant Price List is selected in the Variant and Pricing section of the Bookable Product form, this being where the pricing of the product is entered into. The Variant Price Lists are also subsequently linked to the channel using the channel price list entity. It is recommended that you have a separate variant price list for use with stock products. To create a new Variant Price List see <u>Section 3.3.</u>

• Sales Plan. A default sales plan of type Other linked to the company details needs to be set up. This sales plan is used for all stock, scheduled and auto-scheduled products. A channel Price List will then need to be linked to the Sales Plan.

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#### **STEP 1: CAPTURING A MEMBERSHIP PHOTO**

The following details in the Terminal form must be complete for a camera to be linked to the terminal. If no camera is to be linked to the terminal please skip to Step 2.

- a) In the Navigation bar select Venue Management, followed by Terminals.
- b) A list of all the terminals currently created will be displayed, open the terminal where a camera is to be linked to.
- c) In the terminal form, these fields must be complete under the Camera heading:

▼ Camera		
Camera Url	http://localhost:8888/out.jpg	
Camera Refresh Rate	10.00	

- Camera Url. Enter the Url of the camera that is to be linked to the terminal.
- Camera Refresh Rate. Enter the refresh rate for the attached camera. E.g. 10.00
- d) Repeat the above step for each terminal that a camera is to be linked to. Select Save and Close in the ribbon.



**Note:** Pass setting can now be used in conjunction with the settings of a Membership product. For examples of these and how they are set up please see <u>Pass and Membership Settings Scenarios</u>

For the Edit Beneficiaries dialog to appear after the payment is taken, ensuring the operator takes a membership photo, complete the following:

- a) Select Venue Management, before choosing Channels.
- b) A list of all the Channels currently in use will be displayed, open the appropriate Channel. e.g. POS.
- c) In the Channel form under the General section, complete the following field:
  - **Request Product User Info After Payment.** Select **Yes** if a camera is linked, this will display the Edit Beneficiaries dialog after payment, ensuring the operator takes a membership photo. Select **No** if the Edit Beneficiaries dialog is not required after payment.
- e) Select Save and Close on the ribbon.



**Note.** The above functionality only work if on the Bookable Product form the **Is Membership field** is set to **Yes** and a camera is linked to the terminal.



#### **STEP 2: MEMBERSHIP NUMBER SET UP**

When setting up Membership, the option exists to have the membership numbers auto generated by the system or manually entered or scanned. The latter would be for instances when existing membership cards exist and the barcode numbers on these cards is to be used.

#### Manually captured Membership Numbers:

To set up for Membership Numbers to be manually captured:

- a) Select Channels on the Venue Management tab.
- b) Select POS.
- c) Ensure the Membership Number Read Only, is selected to No



- d) Select Company Details on the Venue Management tab.
- e) Open the Active Company Details form

Membership Number	⊙ No	🔿 Yes
Auto Generated	<u> </u>	<u> </u>

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

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

#### **Auto Generated Membership Numbers**

To auto generate membership numbers:

- a) Select Channels on the Venue Management tab.
- b) Select POS.
- c) Ensure the Membership Number Read Only, is selected to Yes

Membership	⊖ No	Yes
Number Read Only		

- d) Select Company Details on the Venue Management tab.
- e) Open the Active Company Details form

Membership Number Auto	O No	Yes
Generated		

f) Ensure the Membership Number Auto Generated, is selected to Yes.





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

# **STEP 3: SETTING UP YOUR CHANNEL PRICE LIST**

Channel prices lists are used to link a variant price list to a channel. Multiple price lists can be in use simultaneously.

The channel price list can be reused; therefore you may only need to create the channel price list once for each variant price list – channel combination.

- a) On the CRM navigation panel, select Sales Plan on the Product Management tab.
- b) A list of sales plans matching the view criteria will be displayed.
- c) Open the Default Sales Plan (the default sales plan should be linked to the company details record in CRM).
- d) The Sales Plan record will open in the form view. Select **Channel Price Lists** in the form navigation area.
- e) A list of existing channel price lists linked to the sales plan will be displayed. To create a new channel price list select **Add New Channel Price List** on the ribbon.
- f) Complete the following details:
  - Name. Enter a name for the channel price list.
  - Channel. Select the appropriate channel.
  - On Sale Date. Enter the date when the channel price list will come into use.
  - Marketing List. If applicable select the marketing list the channel price list relates to. If a marketing list is applied to a channel price list, only contacts that have been added to the marketing list will use the channel price list. This option can be used to give beneficial prices to people that have previously bought a particular product, for example a membership product. Preferential pricing can either be driven by the use of a different variant price list, or by entering a discount percent.
  - **Discount Percent.** If using a discount enter the percentage discount offered to users of the channel price list. This option can be used in conjunction with a marketing list to offer members of the marketing list a discount. It is also possible to enter a discount percent to a channel price list that does not have a marketing list, all product sold using the channel price list will then be subject to the entered discount.
  - **Discount Category.** If the discount is to be applied to a subset of products only, select the product analysis category that the subset of products have been linked to.
  - Variant Price List. Select the variant price list to be used.
  - Off Sale Date. Enter the date the channel price list will stop being used. This field can be left blank.
  - Max Quantity. If the customer is limited to only buying a defined number of products at the discount price, e.g. the member can purchase one lift pass at 50% price only per booking, enter the maximum quantity. If this field is left blank the member will be able to purchase unlimited numbers of products at the discounted price.



• **Discount Rounding.** Enter the discount round value (in pence). The discount will be rounded to this value when applied to the shopping cart. For example, enter 10 to round to the nearest 10p.



**Note:** All other fields in the Channel Price List form that have not been described above do not need to be filled/changed.

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

## **STEP 4: CREATE THE BOOKABLE PRODUCT**

The Bookable Product entity is used to represent products that are sold such as the particular membership products. To set up a bookable membership product carry out the following:

- a) Select Bookable Products on the Product Management tab.
- b) Select **New** on the ribbon. A blank Bookable Product form will be displayed. Complete the following:

General:

- **Name.** Enter a name for the product. The name will be visible to customers, and should therefore reflect the nature of the product.
- **Translated Name.** Used for translated implementations. For more information see the <u>set up for Multi</u> Lingual using the Translation Field
- **Description.** Enter a description of the product. The Description field can be set as a translatable string if desired (if used in the Web UI). <u>See the Set up for Multi Lingual using the Translation and Description Field</u> for further information.
- **Type.** Use the drop-down list to select the type of product. For memberships select **Stock** from the list of available values. Pass product settings can now be used in conjunction with the settings of a Membership product and the Type **Pass** can be chosen, for more information on the scenarios where Memberships can be set up using the Type **Pass** see <u>Membership Product Scenarios</u>.
- **Payable By.** If the product can be paid for using direct debit select the direct debit payment method.
- VAT Code. Select the VAT Code that applies to the product.
- External Product ID. May be used for access control.
- **Sequence.** Enter a sequence number for the product. The sequence number is used to determine the order in which products are displayed in the POS and Web channels.



- **Beneficiary Requirement.** Use the drop-down list to select **Required or Requested**, the customer must provide their name and contact details when setting up a membership product.
- **Available Offline.** Select **Yes** if the bookable product is to be available for purchase through the offline EPOS. This option cannot be used for products that require capacity to be monitored.

#### **Referring Entities:**

- **Category.** Use the Look Up dialog to select the product category. The category is used to group products, for example into memberships, food, etc. The categories are used by the price list and channel editors.
- **Product Calendar.** Select the default product calendar. For more information on Product Calendars see <u>Product Calendars</u>.

#### Membership and Pass setting:

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

#### Membership:

- Is Membership. Select Yes when creating a membership scheme.
- **Membership Duration.** If the membership is for a specific duration enter the number that the membership will be valid for. The duration will be used in conjunction with the entry in the membership duration unit field.
- **Membership End Day**. If the end day and/or month of the membership are specified, the next date which matches these values will be used as the expiry date. This should be used for membership products with a defined end date rather than a duration.
- **Membership Duration Unit.** If the membership is for a specific duration select the membership duration unit, for example is the membership duration counted in **weeks**, **months** or **years**. This field will be used in conjunction with the membership duration field.
- **Membership End Month**. If the end day and/or month are specified, the next date which matches these values will be used as the expiry date. This should be used for membership products with a defined end date rather than a duration.

• Number of Days to Activate. If applicable for the membership, enter the number of days from the purchase date that a product must be activated in before activation is no longer allowed.

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Time Settings:

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



**Note:** All other fields in the Channel Price List form that have not been described above do not need to be completed/changed.

- c) Select Save on the ribbon.
- d) Next, it is necessary to indicate which channels the product can be bought via. To set the Channels carry out the following:
  - Select **Channels** in the Form Navigation area.
  - The channels that have been set up during the configuration on your system will be listed. Select the checkbox alongside each channel through which the product will be sold, for example POS or Web.
  - Select Save on the ribbon.
- e) Next, it is necessary to identify the Product Variants and Prices:
  - Select Variants & Pricing in the Form Navigation area.
  - To select a variant, in the drop-down list on the left hand side (highlighted below), select the appropriate option. All of the variants available in your system will be listed. If you have categorised the variants they will displayed in the relevant categories.
  - Select the green cross alongside the variant name to add.





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



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

• To enter price information for the product, select the relevant Variant Price List from the drop down at the top of the Variants & Pricing section (highlighted below):

ariants & Pricing							
				Eden - A	dmise 🗸 🗌	~	
	Code	Not for Sale	Mandatory Variant	Peak Price	Off Peak Price		
Membership (Adult)				100.00	100.00		
Membership (Child)				50.00	50.00		

- Enter the pricing (peak and off peak) information for each of the variants that are to be included on the price list. The peak and off peak price value entered here should be the same.
- Repeat this process for each price list used to govern the pricing of the selected product.
- g) Select Save & Close on the ribbon to close the Bookable Product record.

# **3.12. SETTING UP PASS TYPE PRODUCTS**

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

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

To create a Pass product in CRM, the following must be completed:

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



- **Channels.** The channels the products will be sold.
- Variant Types. Variant Types describe the type of Bookable Product that you can purchase. For example for Passes there should be a Variant Type created for each of the different groups of people that a Pass could be sold to such as Adult, Child, Student or OAP. Variant Types should be reused where possible.
- Variant Price List. The Variant Price List is selected in the Variant and Pricing section of the Bookable Product form, where the pricing of the product is entered into. The Variant Price Lists are also subsequently linked to the Channel using the Channel Price List entity. It is recommended that you have a separate Variant Price List for use with stock products.
- Sales Plan. A default sales plan of type 'Other' linked to the Company Details needs to be set up. This Sales Plan is used for all Stock, Scheduled, Auto-Scheduled and Pass products.

#### **STEP 1: SET UP YOUR CHANNEL PRICE LISTS**

Channel Price Lists are used to link a Variant Price List to a Channel. Multiple price lists can be in use simultaneously.

The Channel Price List can be reused; therefore you only need to create the Channel Price List once for each Variant Price List – Channel combination.

To set up a channel price list:

- a) On the CRM navigation panel, select Sales Plan on the Product Management tab.
- b) A list of sales plans matching the view criteria will be displayed.
- c) Open the **Default Sales Plan** which is type **Other** (the default sales plan should be linked to the company details record in CRM).



**Note:** Pass setting can now be used in conjunction with the settings of a Membership product. For examples of these and how they are set up please see <u>Pass and Membership Settings Scenarios</u>

- d) Select **Channel Price List** in the form navigation area.
- e) A list of channel price lists that have been previously linked to the variant price list will be shown. Select Add New Channel Price List on the ribbon.
- f) A blank channel price list form will be displayed. Complete the following details:
  - Name. The name of the channel price list.
  - **Channel.** Select the Look Up icon alongside the field. The Look Up Records dialog will be displayed. Select the appropriate Channel before clicking **OK** to continue.
  - **On Sale Date.** Enter the date and time when the price list will be available for use by the Channel. An On Sale Date must be entered when creating a price list for Stock products.
  - **Marketing List.** If applicable, select the Marketing List the Channel Price List relates to. If a Marketing List is applied to a Channel Price List, only contacts that have been added to the marketing list will use the channel price list. This option can be used to give beneficial prices to people that have previously bought a particular product, for example a membership product. Preferential pricing can either be driven by the use of a different variant price list, or by entering a discount percent.

• **Discount Percent.** If using a discount enter the percentage discount offered to users of the channel price list. This option is used in conjunction with a Marketing List to offer members of the Marketing List a discount.

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- **Discount Category.** If using a discount use the lookup to select the product category the discount percent will be applied to. If a product category is not entered, the discount percent will be applied to all products.
- **Sequence.** The sequence number is used to determine which Channel Price List is used if there is more than one valid Channel price list available.
- Variant Price List. Use the Lookup Records dialog to select the appropriate price list. The price list that you are to use for the Bookable Product should be selected.
- **Off Sale Date.** Enter the date and time when the price list will stop being available for use by the Channel. An Off Sale Date must be entered when creating a price list for Stock products.
- Max Quantity. This option, when used in conjunction with a Marketing List can be used to limit the number of a selected product that a customer can purchase. This option can be used to limit the number of products a customer can buy at a preferential rate. Alternatively this option can be used to limit the number of tickets a member can purchase before general release.
- **Discount Rounding.** Enter the Discount Rounding i.e. to the nearest penny, 10p or pound. If a value is not entered the system will default rounding to a penny.



**Note:** All other fields in the Channel Price List form that have not been described above do not need to be completed/changed.

A channel price list will need to be created for each Variant Price List – Channel combination created.

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

## **STEP 2: CREATE THE PASS TYPE BOOKABLE PRODUCT**

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

To create the Pass Bookable Product:



a) In the navigation area select Product Management followed by Bookable Products.



- b) A list of Bookable Products will be displayed, in the ribbon select New.
- c) A new Bookable Product Form will appear. Enter the following:

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Save & Save & No Save & Save & Close		Copy a Link	Statt Run     Report     Process Oata				
Information		Bookable 3 New	Product				lociatie Finducti 💌 🛧 🕸
Variants & Pricing     Itowing     Notes     Conflicts Tab		* General Name*	1				^
Related		Translated Name Description					
Common     Activities     Oored Activities	^	Cross Sell Product Description Type	Stock	~	Sequence	1	
Audit History		Availability Is Course	O No O Yes		Beneficiary Requirement Capacity	Not Required	2
Product Channels     Product Sessions     Product Variants		Ask Booking Questions	No ○ Yes		Report Category		
lesource Types	~	Is Single Booking	(i) No () Yes		Code		

General:

• **Name.** Enter a name for the product. The name will be visible to customers, and should therefore reflect the nature of the product, for example; Day Pass.



- **Translated Name.** Used for translated implementations. For more information see the <u>set up for Multi</u> Lingual using the Translation Field
- **Description.** Enter a description of the product. The Description field can be set as a translatable string if desired (if used in the Web UI). <u>See the Set up for Multi Lingual using the Translation and Description Field</u> for further information.
- **Type.** Use the drop-down list to select the type of product. For open day passes select **Pass** from the list of available values.
- **Payable By.** If the product can be paid for using direct debit select the direct debit payment method.
- VAT Code. Select the VAT Code that applies to the product.
- External Product ID. May be used for access control.
- **Sequence.** Enter a sequence number for the product. The sequence number is used to determine the order in which products are displayed in the POS and Web channels.
- **Beneficiary Requirement.** Use the drop-down list to select **Requested**, the customer must provide their name and contact details when setting up a membership product.
- **Available Offline.** Select **Yes** if the bookable product is to be available for purchase through the offline POS. This option cannot be used for products that require capacity to be monitored.

Referring Entities:

- **Category.** Use the Look Up dialog to select the product category. The category is used to group products, for example into memberships, food, etc. The categories are used by the price list and channel editors.
- **Product Calendar.** Select the default product calendar. For more information on Product Calendars see <u>Product Calendars</u>.

Membership and Pass setting:

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

Time Settings:

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



Delay Purchase:

- **Delay Duration.** If you wish to delay the Pass product from being available for a certain amount of time, enter the unit number here.
- **Delay Duration Unit.** Used in conjunction with the Delay Duration select the delay Duration Unit from the choice of Hours, Days, Week or Months. For example, if the Delay Duration is set to 1 and the Delay Duration Unit is set to Days, this setting would prevent a Pass being brought for 1 day.

Pass Settings:

- Number of Uses. Enter the number of times that a pass can be used to gain access to a venue. For example if the pass can be used only once, enter 1. Contrastingly, if the pass can be used on multiple occasions, enter the number that represents this amount.
- Number of Days Before Entry Allowed. Enter the number of days after a pass has been purchased that it must be activated by.
- Number of Days Before Entry Rejected. Enter the number of days after the purchase that the pass is valid for. For example, if the pass must be used within one year of being purchased, enter 365. After this amount of days entry will be rejected via the pass.



**Note:** All other fields in the Bookable Product form that have not been described above do not need to be completed/changed.

- d) Select **Save** on the ribbon.
- e) Next, it is necessary to indicate which Channels the product can be bought. To set the Channels carry out the following:
  - Select **Channels** in the Form Navigation area.
  - The Channels that have been set up during the configuration on your system will be listed. Select the checkbox alongside each channel through which the product will be sold, for example POS or Web.
  - Select **Save** on the ribbon.
- f) Next, it is necessary to identify the Product Variants and Prices:
  - Select Variants & Pricing in the Form Navigation area.
  - To select a variant, in the drop-down list on the left hand side (highlighted below), select the appropriate option. All of the variants available in your system will be listed. If you have categorised the variants they will displayed in the relevant categories.
  - Select the green cross alongside the variant name to add.



Save & New Save & Deactivate Close X Delete Save	Sharing - Collaborate  Start Collaborate  Process Data
Information General Channels	Bookable Product test
Variants & Pricing Bowling Notes	Variants & Pricing  Mandatory  Mandatory
Common     Activities     Cosed Activities     Audit History     Audit History	Variant Type

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



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

• To enter price information for the product, select the relevant Variant Price List from the drop down at the top of the Variants & Pricing section (highlighted below):

/ariants & Pricing				Eden - Ad	tmiss 🗸	 ~	
	Code	Not for Sale	Mandatory Variant	Peak Price	Off Peak Price		
Day Admission - Coupon Test (Adult)	(			20.00	20.00		
Open Day Pass (Pos) (Child)				15.00	15.00		
	~	o					

- Enter the pricing (peak and off peak) information for each of the variants that are to be included on the price list. The peak and off peak price value entered here should be the same.
- Repeat this process for each price list used to govern the pricing of the selected product.
- g) Once the pricing details are complete select **Save and Close** on the ribbon to save the product.



# PASS AND MEMBERSHIP SETTINGS SCENARIOS

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

# **PASS PRODUCT SCENARIOS:**



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

	Open Pass	Dated Day Pass	Multiday Pass	Multiday Pass-Disney Model				
Detail of the type of Pass	The Pass can be scanned once and has a set amount of time to be used from the date that it is purchased.	The Pass begins on a selected date.	The Pass can be used on multiple occasions in a set period of time.	The Pass can be used on multiple occasions in a set amount of time but the first scan of the Pass must be made in a selected number of days.				
Example	A Pass can be used once and has 1 year from the purchase date to be used.	The date of when the Pass can start to be used is able to be selected.	Can make 3 visits using the Pass in a 1 year period.	Can make 3 visits in a week using the Pass but the first scan of the Pass must be made within 30 days of it being purchased.				
	Bookable Product Form Settings using the above examples							
Туре	Pass	Pass	Pass	Pass				
Collect start date	No	Yes	No	No				
Is Membership	No	No	No	No				
Number of Days to Activate (Membership field)	Leave blank	Leave blank	Leave blank	30				
Number of Uses	1	1	3	3				
Number of Days Before Entry Rejected	365	Leave blank	365	7				



Number of Days Before Entry Allowed	Leave blank	Leave blank	Leave Blank	Leave Blank
---	-------------	-------------	-------------	-------------

# **MEMBERSHIP PRODUCT SCENARIOS:**

	Annual Membership 1	Annual Membership 2	Membership	Annual Membership as a gift
Details of the type of Membership	Unlimited visits for an annual period with the Membership beginning on the date that it is purchased	Unlimited visits for an annual period with the start date being selected.	Unlimited visits until a set date.	Unlimited entry for an annual period with the Membership beginning upon the first scan. The gift receiver has a set amount of days to activate the Membership
Example	Unlimited visits using the Membership in a 1 year period from the purchase date	Unlimited visits using the Membership in a 1 year period with the start of the Membership being selectable.	Unlimited visits using the Membership until a set date.	Unlimited visits using the Membership which will begin upon the first time that it is scanned. The Membership must be activated within 30 days of purchase.
	Bookab	le Product Form Settings us	ing the above examples	
Туре	Pass	Pass	Pass	Pass
Collect start date	No	Yes	No	No
ls membership	Yes	Yes	Yes	Yes
Membership Duration	1	1	Leave blank	1
Membership Duration Unit	Year	Year	Leave blank	Year
Membership End Day	Leave blank	Leave blank	Enter end day e.g. 31	Leave blank
Membership End Month	Leave blank	Leave blank	Enter the end month e.g. July	Leave blank

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Number of Days to Activate	Leave blank	Leave blank	Leave blank	Enter number of days to activate. E.g. 30
Update Start On First Use	No	No	No	Yes



# 3.13. ENTITLEMENTS

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

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

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

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

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

Entitlements can be applied to Stock, Scheduled, Auto-Scheduled, Fixture and Series type products.

# **ENTITLEMENTS AND THE CHANNEL PRICE LISTS**

Sample S	ieries CPL - P	os				Channel Price Lists	• + • •
General							
Name*	Sample Series CPL	POS					
Channel	A POS		12	Variant Price List	Series Renewal		-
On Sale Date		10 v	[m]	Off Sale Date		10v	16
On Sale Days Before	365			On Sale Hours Before			
Off Sale Days Before	-t			Off Sale Hours Before	1		
Activity Start Date		11. M	125	Activity End Date			1
Manveting List	E UM Test			Priority Provider			A
Discount Percent	50.00			Max Quantity	5		_
Discount Category			172	Discount Rounding			

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

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

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

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

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

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



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

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

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

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

## **ENTITLEMENTS AND THE CHANNELS**

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



#### POS:-

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

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

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

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

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



Stimpson Joe walker		Add E	dit Photo Seat	X0 Car	u .	Hide	
ttie	Mr.	First Name	the	Last Name	Stimpson		
Address I	Tigers Way	Postcode	le193lw	Email	Stimmo@g4.com		
Birthdate	17/02/1978	Mobile	67815124423				
	<u></u>						



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

#### Web:-

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



# 3.14. SETTING UP CROSS SELL PRODUCTS

Cross sell products allow one product to be cross sold with another, therefore offering the option to buy another product when the cross sell has been set up. This enables the end customer using the Web or the POS operator to swap a product to be purchased with another product. This is often used in the leisure industry, for example it is common practice for a leisure attraction to try and convert day passes into annual passes.



**Note:** It must be noted that for this to work the variants of the Parent and Child product that will be swapped must be the same.

# **STEP 1: SETTING UP THE CROSS SELL PRODUCTS**

To set up a Cross Sell Product in CRM:

a) In the Navigation bar select **Product Management** followed by **Bookable Products**. From here, select a parent product.



b) Upon opening the Bookable Product select Parent Cross Sell Product in the related navigation bar.



Bookable Product. Add	Customiza	List Tools Cross Sell Product	AR Micro	soft Dynamics Cl	м		6 Eden	ireen 4 DBA 🤷 Project Test 🚕
Add New Cross Sell Product Recurit	ssel tat ×		i∰ Copy a Link '∑ E-mail a Leik aborate	Filter G	Set As Default View View	Run Start Workflow Dialog Process	Run Report - Data	
Information - General - Channels - Variants & Pricing	Ann	ble Product ual Pass Cross Sell Product	🗉 Cross Sell P	roduct Asso	ciated View *		Bookable Produ	da • • •
- Bowling - Notes - Conflicts Tab	Name			Cre	ated On 09/18/2014 17:57		-72	8
Conside yab      Related     Product Sessions     Stock Transactions     Channels     Dament Cross Sell Product     Did Cross Sell Product     Bookable Product Mo.,     Bookable Product Mo.,     Product Groups								
Offers	1 - 1 of 1 (0 se	kected)					1	e -t Page 1 k
A Processes	Ali #	A B C D	E E G )	1.1.1.2.2	K L M N	O P Q R	S T U V W	XYZ

c) In the ribbon select **Add New Cross Sell Product**, a Cross Sell Product form will be displayed. Enter the following:

Cross Sell Product Ad	d Customize				Stadium Demo 🚕
Save & New Save & New Save & New Save & Save	1 YODA II TUM	Start Run     Hun Start Report     Prucess Data			
Information General Notes	Cross Sell New	Product			Cross Sell Product 🔶 🔶 🔶
Related	- General				
Common     Activities     Gosed Activities     Addt Hatory     Processes     Workflows     Dulog Sestions	Name * Parent Cross Sell Product • Notes	Away Shorts	Child Produ	Cross Sell	

- Name. Enter a name for the Cross Sell Product
- Parent Cross Sell Product. The parent product should already be displayed.
- Child Cross Sell Product. Use the Look Up to select an existing Bookable Product or create a new bookable product to add. This will be the product that will available as the Cross Sell Product on the POS



Note: It must be noted that the Child Cross Sell bookable product chosen must be of Type: Stock, Coupon, Voucher or Pass.



- d) Select Save and Close on the ribbon.
- e) A Child Cross Sell Product will now be linked to our Parent Product. Therefore whenever you try to sell the parent product in POS you will see an option to buy another product as long as this has got the same category of variants.

Roads Protect Are	Contrast Constant Constant	all Informati Dynamic	3 (364		abbut Mait 🤗 Stadium 🚌
And Head Cross Set And Empired Cross	See See Concept	Constant Street Line		A Denaid Chert March	Set
tehenution - Gerent - Chemete	Fosterzz			3	ootaba Products 🔹 🕈 4
<ul> <li>Versite &amp; Plaze g</li> <li>dowing</li> <li>Notes</li> </ul>	Der Cross Sell Product Cross Sell Product As	sociated View * Created Co		Lance for (W2728)	
Address Verbage Address Verbage Address Perbage Address Perbage Postal Formers Postal Security Postal	Cross Set 1 - Andres + Pesc Cross Set 2 - Norme - Grown plant Cross Set 8 - Norbes + Groger	85/10/0014 1465 97/10/0014 11/55 10/10/0014 1046			
à hockala Product. à Product Oreage à Offen Processes Ga Waathoot ⊒ Daiog Sensors	1-3 of 3 3 alexium Al 4 A 8 C 11 1 1000 Albe	7 (8 (8 ) I (1	1 15- M N 10		is crappin w x r z

#### **STEP 2: SETTING THE CHANNEL**

It is essential to enable the Cross Sell Product setting in the Channel.

- a) In the navigation bar select Venue Management followed by Channels.
- b) Select the Channel where you would like your Cross Sell Product to be sold under, for example POS. You will have to repeat this process for each channel that is required to sell Cross Sell Products.
- c) In the General section of the channel form you will see the option to enable or disable Cross Sell Product. Ensure that this box is set to **Yes.**



Close X Delete	Corbitecrante Process Data		
formation Bowing Settings Tabs Settings	Channel POS Market Dark (Than ) No (1) No (1) Fee	CaleContenting	● No () Tet
Settinge General Notes	Terms Acceptance O No O Yes Required	From Attribute Activation Required	No O Yes
alated	Behaviours		
Activities	Offer Additional Offer Additional Offer Additional Offer Additional Offer Yes Products Do not create stock I Ra O Yes Transactions Away Tickets	Return Stock Levels	() No € Ves
Channel Price Lists     Bocking Questions     Additional Charges	Away Ticket Details94b_TicketRaterenceNumber.g4b_away6lockist.g4b_row.g4b_met.g4b Tic Record Donations		
👌 Bookings 🎝 Channel Sale Dates	Denation Freduct 🔂 Shopping Backet Donation	Donation Percent	10.00
Menu Boards     Declarations     Declarations	Cress Sell Products Dogtay Cress Sell O No D Yes Products		

- d) Now you have completed all the steps in CRM and the product should now be displayed in POS
- e) Once the sale is completed in the POS, you will see both the original product and Cross Sell products under the booking in CRM

Save		Collaborate	Process Data				
Information General Notes		Booking Product activity booking item 14/10/2014 10:54:05					Booking Prod
Related		4 General					
▲ Common		Name *	activity booking item 14/10/2014 10:54:0	5			
Activities	^	Booking	🖓 order 14/10/2014 10:54:05	<b>D</b>	Booking Price	£3.00	
👌 Closed Activities		Product Variant	👌 Fosters - Pint		Product Session		
Audit History		riodact variant			Troduce Session		
🍙 Product User Chan		Start Datetime		M.	End Datetime		••
🍐 Purchased Coupons		Cross Sell Variant					
🎄 Redeemed Coupons							
🎄 Purchased Vouchers		▲ Notes					
🍐 Booking Ticket Cop							
Booking Ticket Cop		Enter a note					

### STEP 3: SETTING THE CROSS SELL HEADER AND SUB HEADER

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

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

- a) In the CRM Navigation Panel select Venue Management followed by Company Details.
- b) Open the Company Details form and scroll down to the Cross Sell Products section. Complete the two fields:



Cross Sell Produ	cts		
Cross Sell Page Header	Would you like to donate your entry fee?	Cross Sell Page Sub Header	Allow us to treat your admission fee as a gift and $\underline{\varsigma}$

- **Cross Sell Page Header.** Enter a title of the header that will be displayed on the POS and Web of the cross sell. In the example above and below this being 'Would you like to donate your entry fee?'
- Sell Page Sub Header. Enter a Sub Header that will be displayed on the POS and Web of the cross sell. In the example above and below this being 'Allow us to treat your admission fee as a gift and get free entry for up to a year!'

Vould you like to donate your entry fee?				<ul> <li>Cross Sell Page Header example, as shown on the web</li> </ul>
allow us to treat yo earl	our admission fee as a	a gift and get free entry for i	to a	Cross Sell Page Sub Header example, as
Annual Me	mbership Coupon			shown on the web
Unlimited	entry for a year			
Select	£20.00			
No the	inks			

Would you like to donate your entry fee?	Cross Sell Page Header example, as shown on the POS
Annual Membership - £20.00	Cross Sell Page Sub Header example, as shown on the web
No Thanks	

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



# 3.15. SETTING UP SEASON TICKET BUY-BACK FUNCTIONALITY IN CRM

This functionality allows for a Season Ticket holder to exchange their Season Ticket seat for loyalty points when they are unable to attend a fixture. The Season Ticket holder's seat can be 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.

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

Note: The Season Ticket Buy-Back functionality does not support unseated/standing Season Tickets.

For the functionality to be enabled fully, Loyalty Transaction Sources and Loyalty Pints rules must have been created with a workflow ran against these. For instructions on how to do this see Green 4s **Loyalty User Guide.** 

#### STEP 1: ENABLING BUY-BACK IN THE COMPANY DETAILS FORM

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

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

a) Select **Venue Management** in the navigation area before choosing **Company Details**. The active company details will be displayed.





b) Open the Company Details. The Company Details form will be displayed, scroll down to the **Default settings for ticket buy-back** section as shown below.

Default settings for	season licket boybacks:		
Buy-back-used	🔿 No 🛞 Yes		
Release buy-backs	O On demand      immediately	Buy-back cut off before start time (hours)	1
Buy-back inyafty pr	ints (awarded post fixture)		
Total points for buy- tiack	40		
Points per offer (% of total points)	30.00	Points per pulchase (% of total points)	73.00

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

Buy-back loyalty points (awarded post fixture)

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

For more information on how the loyalty points are calculated see <u>examples of the points system</u> in Step 3.



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

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

d) Select Save and Close on the ribbon.



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

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

- a) Select **Venue Management** on the navigation bar before selecting **Channels**. A list of all the active Channels will be displayed.
- b) Open the channel that the un-offered period is to be set up on. If it is used on 2 channels, for example the Web and the POS, then these steps will need to be repeated for each channel.
- c) Scroll down to the Season ticket buy-backs section of the channel form and complete the following:

Season ticket buy-ba	acks
Ticket buyback un-	
offered period (Minutes)	

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

# **STEP 3: SETTING THE BUY-BACK ON THE FIXTURE**

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



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

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

- a) In CRM, select **Product Management** in the navigation bar before selecting **Fixtures.** All of the currently active fixtures will be displayed.
- b) Open the fixture that the buy-back functionality is to be set up on. Please note that
- c) In the Fixture form, find the **Buy-back Details** section as is shown below. The following fields must be completed:



Season ticket buy-ba	icks		
(Leave any buy-back	field blank & save to use default values fro	om Company Details)	
Release buy-backs	On demand	Buy-back cut off before start time (hours)	
Buy-back loyalty poi	nts (awarded post fixture)		
Total points per buy- back			
Points per offer (% of total points)		Points per purchase (% of total points)	

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



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

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



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

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

d) Select Save and Close in the ribbon.

## **EXAMPLE OF THE BUY-BACK POINTS SYSTEM**

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

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

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

Total points per buy- back	% of the Points per offer	% of the Points per purchase	Points gained if the ticket is offered	Points gained if the ticket is purchased
100	25%	75%	25 points	75 points
80	40%	60%	32 points	48 points
60	30%	70%	18 points	42 points
50	80%	20%	40 points	10 points
30	10%	90%	3 points	27 points

## STEP 4: SETTING A LOYALTY INCREMENT TO THE BLOCK

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

To set the Loyalty Increment for each block:

- a) Select Venue Management in the navigation bar followed by Venues. A list of Active Venues will be displayed.
- b) Open up the relevant Venue and within the Venues form, select **Blocks** in the navigation area.



The Venue Add Cutto	anita
Save & New Save & Deactivate Cose Save & Delata	Copy a Link E-mall a Link Collaborate Collaborate Proces Data
Information U Semmal	Green4 Stadium
Related  Common  Audit History  Blocks Venue Configurations  Series  Fixtures  Processes  Workflows  Dialog Sessions	General     Name     Sticiata Install No.     Destination Folder     Latitude

- c) The blocks of the venue will be displayed. Select the block where the Loyalty Increment is to be entered. This will need to be repeated for each of the blocks that a Loyalty Increment is to be entered into.
- d) The Block form will be displayed. Complete the following field:

Season ticket buy	backs		
Loyalty increment (% of Total points per buy-back)			

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

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

e) Select **Save and Close** on the ribbon. The above steps will need to be repeated for each block that is to have a Loyalty Increment entered against.

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



To do this complete the following:

Select Settings before choosing Administration. With the Administration area open select **Security Roles**. Select **New** and in the **Role Name** field enter **Block System Data Admin** before clicking **Save and Close**. Return to the **Administration** area and select **Users**. From here open up the main User and within the navigation bar select **Security Roles**. Select **Mange Roles** and place a tick in the Block System Data Admin role name. Select **Ok**.

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



### SEASON TICKET BUY-BACK REPORT

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

- a) Select **Workplace** in the navigation bar before selecting **Reports**.
- b) A list of Available Reports will be displayed.
- c) Select the relevant report named Season Ticket Buy Back Report or Season Ticket Buy Back Detailed Report.
- d) Select **Run Report**, the chosen Report will be generated.

#### Season Ticket Buy Back Report:

Season Ticket Buy Back Re	port						
Venue Name	Area Name	Block Name	Product	Offered	Resold	Not Sold	Resale Tota
Leicester City vs Aston Villa		SB Block 1	Leicester City Season Ticket 2014/15 (Adult)	1	1	0	E20,0
			Total	1	1	0	£20.0
		58 Block 12	Leicester City Season Ticket 2014/15 (Adult)	t	0	1	
			Total	1	0	1	
			Total	2	1	1	\$20.0
			Total	2	1	1	£20.0
Leicester City vs Chelsea		SB Block 1	Leicester City Season Ticket 2014/15 (Adult)	2	0	2	
			Total	2	0	2	
			Total	2	0	2	
			Testal	-		-	č

#### Season Ticket Buy Back Detailed Report:

eason Ticket	Bury Back De	stailed Report								
ixtures: Modified O	n: Last X Daj									
lature	Arca	Block	Season Ticket Holder	Series Product	Row	Seat	Status	Resale Price	Purchaser	Ticket Product
electer City vo		S8 Block 1	jamie vardy (20)	Leicester City Season Ticket 2014/15 (Aduit)	ĸ	3	Sold	£20.00	Joseph Walker (18)	Leicester City FC Fixtures 2014/15 (Adult)
							Total	\$20.00		
		58 Block 12	jamie vardy (20)	Leicester City Season Ticket 2014/15 (Adult)	A	7	On Offer			
							Total			
							Total	\$20.00		
			1				Tetal	130.00		
elcester City vs Delicea	1	58 Block 1	jamie vardy (20)	Leicester City Season Ticket 2014/15 (Adult)	×	8	Sold	£20.00	Juseph Walker (18)	Leicester City FC Fixtures 2014/15 (Adult)
			Joseph Walker (18)	Leicester City Season Ticket 2014/15 (Adult)	ĸ	10	04 Offer			
							Total	120.00		
		SII Nock 12	jemie verdy (20)	Leicester City Season Ticket 2014/15 (Adult)	A.	Ť	Sold	120.00	Jenny Murphy	Leicester Dity PC Pistures 2014/15 (Adult)
							Total	£20.00		
							Total	\$40.00		
							Total	111.00		



# SEASON TICKET BUY-BACK CHECKLIST

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



# 3.16. ADDING FIXTURES TO SEASON TICKET CARDS

This functionality allows for fixtures to be added to an active Season Ticket card. The purpose of this functionality is to allow 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.

Please note that this section assumes that the following have been created:

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

#### **STEP 1: SETTING THE COMPANY DETAILS FORM**

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

a) In CRM select from the navigation bar Venue Management before choosing Company Details.



- b) The Active Company Details will be displayed, open the form by double clicking on it.
- c) The Company Details form will open, find the **Card Options** section of the form shown below and complete the following two fields:



• Allow ticket on card. Select Yes. This will enable the assigning of fixtures to a valid Season Ticket in the Edit Beneficiaries screen of the POS. If No is selected then fixtures cannot be assigned to a valid Season Ticket.

• Allow alternative seat on card. Select Yes if you are to allow fixture ticket that have a different block, row and seat to be assigned to a Season Ticket card. For example this would mean a Season Ticket holder is able to select a different seat to that of their Season Ticket seat to be uploaded onto the card. If **No** is selected then it will only allow fixtures with the same block, row and seat as the Season Ticket card to be assigned to the card.

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d) Select Save and Close on the ribbon.

# STEP 2: SETTING THE SEASON TICKETS BOOKABLE PRODUCT FORM.

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

a) In the navigation bar of CRM select **Product Management** before choosing **Bookable products**.

Fee Bookable Products	v.	e Darts Atal Curtorita	Jak M	Krosoft Dynamics (	CRIM		
New Tatt X Deste -		Convision - Convisio - Convisio - Convisio - Convisio - Convisio - Convisio -	a viter Ad	A) Hone			
Product Man 🙆 🤕 -		Bookable Products Active Bookable P	roducts *				
Analysis Categories		- Natie A	Category	Code	Capacity	Product Calenzia	Sociable Resour Durel
D Bookatie Predacts	1	3012/2013 Away Comh	2012/2013 Avra	9-		Standard Calend	Away Coach
D Finteres		2012/2010 Away Ceach Series	2012/2013 Ave	ць			Away Coach
Product Calendaria		3012/2013 Awey Match	2012/2013 Ave	9-		Standard Calend	Away Match
A Product Sestions		3012/2013 Away Match Series	2912/2013 Ave	¥-			Away Match
a Sales Plans		2013/2014 Assay Ceach Priendly	2015/2014 Ave	9		cetaut	Away friendly C
Series		3013/2014 Away Coact Friendly Series	2013/2014 Ave	9-		default.	Away Friendly C
Variant Price Lists		3013/2014 Away Prievally Match	2213/2014 Ave	¥-		default	Away Triendly
In Verlant Types		2013/2014 Away Prieridly Match Series	2015/2014 Ave	9		detault	Away Menday
Bookasie Product MoolfL.		A Burger and a Mint of Fosters Meal Deal	Mear Desta				
VAT codes	~	A pint of Cerling with food Meal Deal	Meei Deals				
A ANALYZING		Adult T-ahirt	Aduit Shirts				
Workplace	~	Aduits Blazer	Adult Shirts				
Sales		Away GVI Consult Hospitality	2013/2014 Ave	¥-		detault	Away GM Consult
		Away GM Consult Hospitality Series	2013/2014 Ave	9		detault	Anley GM Consult
Marketing		Away GM Consult Standard	2013/2014 Ave	- w		default.	Away GM Consult
Loyalty		Away GVI Consult Standard Series	2213/2014 Ave	¥-		default	Away GM Consult
Bookings		🗋 Belge	Jankar Shirta				
Product Management		Based potato	Food				
		D NGQ Firza	Meei Desis				
Venue Management		Booking fee (optional)	C2				

- b) The Active Bookable Products will be displayed.
- c) Find and open the Bookable Product that Season Tickets are sold upon.
- d) With the Bookable Product form open that represents the Season Ticket, find the **Membership** section of the form, ensure that the following has been complete

Membership		
ls Membership	🔿 No	● Yes

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



Beneficiary	Required	$\checkmark$
Requirement		

- Beneficiary Requirement. Ensure that this field is set to either Required or Requested.
- e) Select **Save and Close** on the ribbon.

# ADDING FIXTURES TO A SEASON TICKET CARD- CRM SETUP CHECKLIST

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



# 4. MISCELLANEOUS

# THE BULK SET UP OF MANY PRODUCTS

The setup of Variant Types and Pricing for many products at once is done using the Product Variant Editor.

- a) In the CRM Navigation Panel select Settings followed by Product Variant Editor.
- b) The Product Variant Editor will be displayed:



- c) The Bookable Products will be listed down the side of the editor. The products are grouped based on product category.
- d) The Variant Types will be listed across the top of the editor. The variant types listed can be changed using the Views drop down. If the required variant type is not available for the Bookable Product, contact your system administrator to request the creation of the variant type.
- e) To set a variant type for a Bookable Product, enter a tick in the relevant checkbox.
- f) Once the details are complete select Save at the top of the editor.



#### SET UP FOR MULTI LINGUAL USING THE TRANSLATION FIELD

If the website is being setup as multi-lingual the translated names will be entered here in the following format. These translated names will appear on the website when the different language selection is made on the website.

fr-FR=	'Product Description' – 'Price'	l	en-GB=	'Product Description' – 'Price'
Country/ Language	The product description and Price	Separator	Country/ Language	The product description and Price

Example E.g. fr-FR= Cartable Double Soufflet -  $\leq 120$  |en-GB= Double Gusset Briefcase -  $\leq 120$  - |en-ES= Cartera con dos compartimentos -  $\leq 120$ Description (this appears online under the product)

#### **PRODUCT CALENDARS**

The Product Calendars entity is used to determine the availability of products, for example they are used to define peak and off peak schedules.

To create a Product Calendar record:

- a) In the Navigation Panel select Product Management followed by Product Calendars.
- b) The Product Calendars list view will be displayed. Select **New** on the ribbon.
- c) A blank Product Calendar form will be displayed. Complete the following details:
  - Name. Enter a name for the calendar.
- d) Once the details are complete click **Save** on the ribbon to continue.

#### **Calendar Items**

The Calendar Items entity is used to define the individual time periods (e.g. days or weeks) included in a Product Calendar. To create a Calendar Items record:

- a) Open the venue's Product Calendar record in the form view (see Product Calendars for details).
- b) In the Form Navigation Panel select Calendar Items.



The Calendar Items list view will be displayed:

File Product Calendar C	List Tools ustomize Calendar Items		oft Dynamics CRI	М				en 4 DBA 🧯 en Project 🖉
Add New Calendar Add Existing Ca Item		Mail Merge Copy a Link	Filter	Set As Default View	Chart Pane + Workflow	Start Dialog Report +	Export Calendar Items	
Records		Collaborate	Current View	View	Proce	iss in the second s	Data	
Information	Product Cal	endar d Calendar				Pr	oduct Calendars	<ul> <li>▼ ⊕</li> </ul>
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Related  Common  Audit History  Calendar Items	Calendar Ite		Ty O	pe	1. 50500,50705 1	End Date 20/08/2050	Day of Week	Ope 2
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Related  Common  Audit History  Calendar Items  Coupon Types Bookable Products  Processes	Calendar Ite		Ty Ov Inc Inc	pe verride clude clude	01/01/1900 01/01/1900 01/01/1900	End Date 20/08/2050	Day of Week Friday Monday Saturday	Ope 2 01/01 01/01 01/01
Related  Common  Audit History  Calendar Items  Coupon Types  Bookable Products	Calendar Ite		Ty Ov Inc Inc Inc	pe verride clude clude clude	01/01/1900 01/01/1900 01/01/1900 01/01/1900	End Date 20/08/2050	Day of Week Friday Monday Saturday Sunday	Ope 2 01/01 01/01 01/01 01/01

- c) Select Add New Calendar Item on the ribbon.
- d) A blank Calendar Item form will be displayed:

Calendar Item			Calendar Items 👻 🛊 🗣
▼ General			
Name *		Type *	Include 🗸
Description			
Start Date *		End Date	
Day of Week	<b>~</b>	Product Calendar	👌 Standard Calendar
Open Time		Close Time	
Peak Start Time		Peak End Time	

- e) Complete the following details:
  - Name. Enter a name for the calendar item. For example if creating a standard day enter the name of the day: Monday, Tuesday, etc, or, if creating a bank holiday enter the name of the holiday, e.g. Easter Monday.
  - **Type.** Use the drop-down list to select the type of calendar item. Select from:
    - i. Include. Select if you creating a standard calendar item, for example a normal day of the week.
    - ii. **Exclude.** Select if you are creating a holiday item when the venue is closed, for example Christmas Day.

iii. Override. Select if you are creating a holiday item when the venue is open, but the standard settings are to be overridden by the calendar item, for example altered opening hours on Christmas Eve.

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- **Description.** Enter a description of the item.
- **Start Date.** Enter the date when the calendar item comes into effect. For example if creating an item to cover the school holidays, enter the first date of the holidays.
- End Date. Enter the date when the calendar item becomes obsolete. For example if creating an item to cover the school holidays, enter the last date of the holidays. If this field is left blank the item will be used indefinitely.
- **Day of Week.** Use the drop-down menu to select the day of the week. Use this option when creating the standard days of the week calendar items.
- **Product Calendar.** The product calendar the calendar item is associated with.
- **Open Time.** Enter the time the venue opens on the day(s) that are being defined.
- **Close Time.** Enter the time the venue closes on the day(s) that are being defined.
- **Peak Start Time.** Enter the start of peak time on the day(s) that being defined. This setting will be used to determine whether customers pay the peak or off peak price for bookings.
- **Peak End Time.** Enter the end of peak time on the day(s) that being defined. This setting will be used to determine whether customers pay the peak or off peak price for bookings.
- f) Once the details are complete select **Save and Close** on the ribbon to continue.



**Note:** The above process should be used to create a calendar item for each day your venue is open. In addition you should create a separate calendar item for any day(s) that do not follow your normal opening or pricing details.