





# Green 4 CRM 2011 Documentation – User Guides Available

Green 4 Solutions has a range of User Guides available to ensure that users can set up their CRM 2011 system appropriately to operate our functionality. This document gives an overview of each User Guide that is available.

The current readily available Green 4 CRM 2011 User Guides are:

### **EPOS User Guides:**

Green 4 Ticketing 3.6 EPOS Guide

The Basics of CRM:

Green 4 Basics of CRM 2011

#### Infrastructure Set Up

Green 4 Infrastructure Set Up User Guide 3.6

Green 4 Infrastructure Set Up User Guide 3.7

#### Venue Management

Green 4 Venue Management User Guide

**Ticketing Booking Product Management** 

Green 4 Ticketing Booking Product Management 3.6

Green 4 Ticketing Booking Product Management 3.7

Green 4 Ticketing Reservations User Guide 3.6

Green 4 Ticketing Reservations User Guide 3.7

#### Promotions, Coupons and Vouchers

Green 4 Promotions, Coupons and Vouchers

## Delivery Options, Charges and Additional Charges

Green 4 Ticketing Delivery Options, Delivery Charges and Additional Charges 3.6

Green 4 Ticketing Delivery Options, Delivery Charges and Additional Charges 3.7

### **Gift Aid and Donations**

Green 4 Ticketing Gift Aid and Donations User Guide

### <u>Retail</u>

Green 4 Retail User Guide

### <u>eCommunications</u>

Green 4 eCommunications- Version 4

### Food and Beverage

Green 4 Food and Beverage User Guide

Green 4 Food and Beverage- Meal Deals User Guide

## **Loyalty**

Green 4 Loyalty User Guide

### Corporate Sales

Green 4 Corporate Sales Process

Multi-Currency & Cash Handling

Green 4 Multi Currency & Cash Handling User Guide





User Guide:	Content:	Version:
<b>a</b>	EPOS User Guide	E
Green 4 Ticketing 3.6 POS Guide	How to use the EPOS for Green 4 Ticketing Version 3.6: <ul> <li>Logging In</li> <li>Booking Screen</li> <li>Tab headings</li> <li>Menu</li> <li>Shopping Cart</li> </ul> <li>Making a Booking</li> <li>Selecting the Ticket Option <ul> <li>Making a Booking for An Away Game</li> <li>Entering the Customers Details</li> <li>Using a Barcode Scanner</li> <li>Using an Existing Customer</li> <li>Creating a New Customer</li> <li>Entering the Beneficiary Details</li> <li>Taking Payment</li> <li>Edit Purchaser dialog</li> <li>Select Delivery Address dialog</li> <li>Payment Methods</li> </ul> </li> <li>Using Tabs</li> <li>Speed Checkout</li> <li>Printing Tickets</li> <li>Batch Printing</li> <li>Shopping Cart- Additional Functionality <ul> <li>Deleting Items from the Shopping Cart</li> <li>Adding Beneficiaries</li> <li>Managing Bookings</li> <li>Finding a Booking</li> </ul> </li>	3.6



User Guide:	Content:	Version:
	<ul> <li>Amending a Bookings</li> <li>Viewing a Booking 's Details</li> <li>Finding a Booking Using the Seat or Ticket Number</li> <li>Searching for a Customer</li> <li>Creating a New Customer</li> <li>Putting a Customer On Hold</li> <li>Customer Details Dialog</li> <li>Information Tab</li> <li>Booking History</li> <li>Reserved Seats</li> <li>Addresses</li> <li>On hold status</li> <li>Reservations</li> <li>Searon Tickets</li> <li>Upgrade</li> <li>Move</li> <li>Print Fixture Ticket</li> <li>Partial Series Sales</li> <li>Coupons</li> <li>Miscellaneous Tasks</li> <li>Locking the Terminal</li> <li>Logging Out</li> <li>Producing a Till Report</li> <li>Opening the Till</li> <li>Record a Cash Skim</li> <li>Offline Working</li> <li>Switching to Offline Mode</li> <li>Switching to Online Mode</li> </ul>	



User Guide:	Content:	Version:
1	The Basics of CRM	6
Green 4 Basics of CRM 2011	A basic introduction to CRM Introduction What is CRM? Why CRM? Using CRM Outlook Client Vs Internet Explorer Client Outlook Client Internet Explorer Client CRM Navigation Work area Navigation bar Navigation bar Navigation bar Navigation bar Navigation bar An example of a CRM form Saving in CRM Account and Contact Management What is a Contact? What is an Account? Building Relationships Activities Marketing Lists Reporting Dashboards	3.6 & 3.7



User Guide:	Content:	Version:
<b>0</b> 0	Infrastructure Set Up	<b>O</b> O
Green 4 CRM Infrastructure Set up User Guide 3.6	An Overview of how to set up Greens 4s CRM Infrastructure to facilitate the use of the Green 4 CRM Modules. <ul> <li>Overview</li> <li>Company Details         <ul> <li>Setting up your Company Details</li> <li>Channels         <ul> <li>Creating a Channel</li> </ul> </li> <li>Terminals         <ul> <li>Creating a Terminal</li> </ul> </li> <li>Payment Methods         <ul> <li>Creating a Payment Method</li> <li>Linked Terminals</li> <li>Green 4 Test Payment Method Example</li> <li>Payment Method Channel</li> <li>EPOS and PDQ terminal</li> <li>Green 4 Test Booking Payment Example</li> </ul> </li> <li>Direct Debit <ul> <li>Creating a Payment Schedule</li> <li>Adding Payment Schedule Items</li> <li>Managing Direct Debit Payments in POS</li> <li>Managing Direct Debit Payments on the Web</li> <li>Viewing Bookings in CRM</li> <li>Submitting Payment Request to London Zurich</li> <li>Collecting Payment Responses</li> <li>Managing Failed Payments</li> <li>Step 1: Identify the Payment and Booking in CRM</li> <li>Step 2: Investigate the Payment using the London Zurich Site</li> </ul> </li> </ul></li></ul>	3.6



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	<ul> <li>Step 3: Amend the Booking in POS</li> <li>Amending a Direct Debit Booking</li> <li>Cancelling a Direct Debit Booking</li> <li>Printers         <ul> <li>Creating a Printer Record</li> <li>Print Transforms</li> </ul> </li> <li>Booking Operators         <ul> <li>Creating a Booking Operator Record.</li> </ul> </li> <li>Allow Offline Working         <ul> <li>Set Your Organisations to Allow Offline Working</li> <li>Set up Terminals</li> <li>Set Up Off Line Payment Methods</li> <li>Set Up Off Line Bookable Products</li> </ul> </li> </ul>	
Green 4 CRM Infrastructure Set up User Guide 3.7. (Includes all new 3.7 fields and instructions on setting up the Access Gate in CRM)	An Overview of how to set up Greens 4s CRM Infrastructure to facilitate the use of the Green 4 CRM Modules. <ul> <li>Overview</li> <li>Company Details         <ul> <li>Setting Up Your Company Details</li> <li>Channels</li> <li>Creating a Channel</li> </ul> </li> <li>Terminals         <ul> <li>Creating a Terminal</li> <li>Setting up the Access Gate in CRM</li> <li>Step 1: Setting up your Terminal</li> <li>Step 2: Setting up your Terminal</li> <li>Step 3: Creating the Access Point and Attendance Zones</li> <li>Step 4: Product Zones</li> <li>Creating a Payment Method</li> <li>Linked Terminals</li> <li>Payment Method Channel</li> <li>EPOS and PDQ Terminal</li> </ul></li></ul>	3.7



User Guide:	Content:	Version:
	<ul> <li>Direct Debit</li> <li>Creating a Payment Schedule</li> <li>Adding Payment Schedule Items</li> <li>Managing Direct Debit Payments in POS</li> <li>Managing Direct Debit Payments on the Web</li> <li>Viewing Bookings in CRM</li> <li>Submitting Payment Request to London Zurich</li> <li>Collecting Payment Responses</li> <li>Managing Failed Payments</li> <li>Step 1: Identify the Payment and Booking in CRM</li> <li>Step 1: Identify the Payment and Booking in CRM</li> <li>Step 2: Investigate the Payment using the London Zurich Site</li> <li>Step 3: Amend the Booking</li> <li>Cancelling a Direct Debit Booking</li> <li>Cancelling a Direct Debit Booking</li> <li>First Payments &amp; Direct Debit Mandate- CRM Set Up</li> <li>Step 1: Set the Direct Debit Mandate to 'Required' on the Bookable Product form</li> <li>Step 2: Set the Payment Method Form</li> <li>Step 3: Set the Company Details Form</li> <li>First Payments &amp; Direct Debit Mandate- The POS</li> <li>Printers</li> <li>Creating a Printer record</li> <li>Print Transforms</li> <li>Booking Operators</li> <li>Creating a Booking Operator Record.</li> <li>Third Party Logins and Operator Groups</li> <li>Allow Offline Working</li> <li>Set Up Off Line Payment Methods</li> <li>Set Up Off Line Payment Methods</li> </ul>	



User Guide:	Content:	Version:
	Venue Management	
Green 4 Venue Management User Guide	<ul> <li>How to set up a Venue for Green 4 Ticketing with both Seated and Unseated Capacity.</li> <li>Introduction</li> <li>Creating Seat Classes</li> <li>Creating Bookable Resources</li> <li>Creating a Venue</li> <li>Creating Bocks</li> <li>Creating Bocks</li> <li>Creating Ablock for a venue</li> <li>Creating Areas</li> <li>Creating a Venue Configuration</li> <li>Venue Configuration Block</li> <li>Creating an Unseated Capacity</li> <li>Create the Venue</li> <li>Create the Block</li> <li>Create the Venue Configuration</li> <li>Create the Venue Configuration</li> <li>Create the Block</li> <li>Create the Venue Configuration</li> <li>Create the Venue Configuration Block and Bookable Resource</li> </ul>	3.6 and 3.7



User Guide:	Content:	Version:
<b></b>	Booking and Product Management	
Green 4 Ticketing Booking & Product Management 3.6	Booking Management and how to set up a range of Products as well as additional functionality linked to Products. <ul> <li>Introduction</li> <li>Booking Management</li> <li>Finding a Booking</li> <li>Booking Form</li> <li>Summary</li> <li>Discount</li> <li>Payment</li> <li>Delivery Address</li> <li>Ticket Collection</li> <li>Operation</li> <li>Linked Bookings</li> <li>Related Items</li> <li>Advanced Find</li> <li>Examples of an Advanced Find</li> <li>Saving Advanced Finds Results</li> <li>How to Share the View</li> </ul> <li>Product Management – putting a product on sale</li> <li>Overview</li> <li>Variant Types</li> <li>Variant Type Components</li> <li>Sales Plans</li> <li>Placing a new Fixture On Sale</li> <li>Step 1: Create the Fixture Sales Plan</li> <li>Step 3: Create the Fixtures</li>	3.6



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	<ul> <li>Step 4: Create a Series and add the Fixtures</li> <li>Step 5: Create the Fixture Bookable Product</li> <li>Fixture Ticket On Sale Check List</li> <li>Placing a new Series on Sale</li> <li>Step 1: Create the Series Sales Plans</li> <li>Step 2: Create the Series Channel Price List</li> <li>Step 3: Create the Series</li> <li>Step 4: Add the Fixtures to the Series</li> <li>Step 5: Create the Series Bookable Product</li> <li>Series On Sale Check List</li> <li>Examples: Using Sales Plans to set up a Series and Fixtures</li> <li>Setting up Away Fixtures and Travel Products</li> <li>The Process</li> <li>Step 2: Creating an Away Bookable Resource</li> <li>Step 3: Creating an Away Venue</li> <li>Step 3: Creating an Away Venue</li> <li>Step 3: Creating an Away Venue</li> <li>Step 5: Create a Venue Configuration Block &amp; Bookable Resources</li> <li>Step 5: Create a Venue Configuration Block &amp; Bookable Resources</li> <li>Step 7: Capturing Away Ticket Information in the POS</li> <li>Setting up Stock Bookable Products</li> <li>Step 1: Set Up your Channel Price Lists</li> <li>Step 2: Create the Bookable Product</li> </ul>	



User Guide:	Content:	Version:
	<ul> <li>Upselling Products (Additional Products)</li> <li>Setting up Products as Memberships         <ul> <li>Step 1: Membership Number Set Up</li> <li>Step 2: Setting Up your Channel Price List</li> <li>Step 3: Create the Bookable Product</li> </ul> </li> <li>Entitlements         <ul> <li>Entitlements and the Channel Price Lists</li> <li>Entitlements and the Channels</li> </ul> </li> <li>Miscellaneous         <ul> <li>The Bulk Set up of Many Products</li> <li>Set up for Multi Lingual using the Translation and Description fields</li> <li>Product Calendars</li> </ul> </li> </ul>	
Green 4 Ticketing Booking & Product Management 3.7	Booking Management and how to set up a range of Products as well as additional functionality linked to Products.         • Introduction         • Booking Management         • Finding a Booking         • Booking Form         • Summary         • Discount         • Payment         • Delivery Address         • Ticket Collection         • Operation         • Linked Bookings         • Related Items         • Advanced Find         • Examples of an Advanced Find         • Saving Advanced Finds Results         • How to Share the View	



User Guide:	Content:	Version:
	<ul> <li>Product Management – putting a product on sale</li> <li>Overview</li> <li>Variant Types         <ul> <li>Variant Type Components</li> <li>Variant Price Lists</li> <li>Sales Plans</li> <li>Placing a new Fixture on sale</li> <li>Step 1: Create the Fixture Sales Plans</li> <li>Step 2: Create the Fixtures Channel Price Lists</li> <li>Step 3: Create the Fixtures Channel Price Lists</li> <li>Step 4: Create a Series and add the Fixtures</li> <li>Step 5: Create the Fixture Bookable Product</li> <li>Fixture Ticket On Sale Check List</li> </ul> </li> <li>Placing a new Series on Sale</li> <li>Step 1: Create the Series Channel Price Lists</li> <li>Step 3: Create the Series Sales Plans</li> <li>Step 2: Create the Series Channel Price Lists</li> <li>Step 3: Create the Series Sales Plans</li> <li>Step 3: Create the Series Sole Plans</li> <li>Step 3: Create the Series</li> <li>Step 4: Add the Fixtures to the Series</li> <li>Step 5: Create the Series Bookable Product</li> <li>Series On Sale Check List</li> <li>Examples: using Sales Plans to set up a Series and Fixtures</li> <li>Setting up Away Fixtures and Travel Products</li> <li>The Process</li> <li>Step 1: Creating an Away Bookable Resource</li> <li>Step 3: Creating a Block to Represent the Away Capacity</li> </ul>	



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	<ul> <li>Step 4: Creating an Away Venue Configuration</li> <li>Step 5: Create a Venue Configuration Block &amp; Bookable Resources</li> <li>Step 6: Set up your Away Series and Fixtures</li> <li>Step 7: Capturing Away Ticket Information in the POS</li> <li>Setting up Stock Bookable Products</li> <li>Step 1: Set Up your Channel Price List</li> <li>Step 2: Create the Bookable Products</li> <li>Stop 1: Set up your Channel Price List</li> <li>Stop 2: Create the Bookable Products</li> <li>Step 1: Set up your Channel Price Lists</li> <li>Step 2: Create the Bookable Products</li> <li>Step 1: Set up your Channel Price Lists</li> <li>Step 2: Create the Bookable Product</li> <li>Auto Scheduled Product On Sale Check List</li> <li>Setting up Scheduled Bookable Products</li> <li>Step 1: Set up your Channel Price List</li> <li>Step 2: Create the Bookable Product</li> <li>Step 3: Scheduled Product On Sale</li> <li>Check List</li> <li>Setting up Scheduled Product On Sale Check List</li> <li>Delayed Purchase of Scheduled and Auto Scheduled Products</li> <li>Setting up Reserve Capacity for Scheduled and Auto Scheduled Products (Reducing the capacity)</li> <li>Setting Up negative Reserved Capacity for Scheduled and Auto-Scheduled Products (Increasing the capacity)</li> <li>Setting up Products as Memberships</li> <li>Step 1: Capturing a Membership photo</li> <li>Step 2: Membership Number Set up</li> </ul>	



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	<ul> <li>Step 3: Setting Up your Channel Price List</li> <li>Step 4 Create the Bookable Product</li> <li>Setting up Pass Type Products         <ul> <li>Step 1: Set up your Channel Price Lists</li> <li>Step 2: Create the Pass Type Bookable Product</li> <li>Pass and Membership Settings Scenarios</li> </ul> </li> <li>Entitlements         <ul> <li>Entitlements and the Channel Price List</li> <li>Entitlements and The Channels</li> </ul> </li> <li>Setting Up Cross Sell Products         <ul> <li>Step 1: Setting up the Cross Sell Products</li> <li>Step 2: Setting the Channel</li> <li>Step 3: Setting the Cross Sell Header and Sub Header</li> </ul> </li> <li>Setting up Season Ticket Buy-Back Functionality in CRM         <ul> <li>Step 1: Enabling Buy-back in the Company Details form</li> <li>Step 2: Setting the Ticket Buy-Back Unoffered Period on the Channel</li> <li>Step 3: Setting the Buy-Back on the Fixture</li> <li>Example of the Buy-Back points system</li> <li>Step 4: Setting a Loyalty Increment to the Block</li> <li>Season Ticket Buy-Back Report</li> <li>Season Ticket Buy-Back Checklist</li> </ul> </li> <li>Adding Fixtures to Season Ticket Cards         <ul> <li>Step 1: Setting the Company Details form</li> <li>Step 2: Setting the Company Details</li> <li>Step 1: Setting the Company Details</li> <li>Step 1: Setting the Company Details</li> <li>Step 2: Setting the Season Tickets Bookable Product form</li> </ul> </li> </ul>	



User Guide:	Content:	Version:
	<ul> <li>Adding Fixtures to a Season Ticket Card- CRM Setup Checklist</li> <li>Miscellaneous <ul> <li>The Bulk Set up of Many Products</li> <li>Set up for Multi Lingual using the Translation and Description fields</li> <li>Product Calendars</li> </ul> </li> </ul>	



User Guide:	Content:	Version:
	Reservations	
Green 4 Ticketing Reservations User Guide 3.6	<ul> <li>Introduction</li> <li>Setting Up Reservation Payment Types</li> <li>Create the Source Reservation Product</li> <li>Create the Target Reservation product</li> <li>Create the Reservation</li> <li>Purchasing Reserved Tickets</li> <li>Using Sequence numbers.</li> </ul>	3.6
Green 4 Ticketing Reservations User Guide 3.7	<ul> <li>Introduction</li> <li>Setting Up Reservation Payment Types</li> <li>Create the Source Reservation Product</li> <li>Create the Target Reservation product</li> <li>Create the Reservation</li> <li>Purchasing Reserved Tickets</li> <li>Using Sequence numbers.</li> </ul>	3.7



User Guide:	Content:	Version:
P	Promotions, Coupons and Vouchers	
Green 4 Ticketing Promotions, Coupons and Vouchers	<ul> <li>How to set up promotions, coupons &amp; vouchers <ul> <li>Promotions</li> <li>Creating a Promotions Record</li> </ul> </li> <li>Coupons <ul> <li>Setting up your Coupon Payment Method</li> <li>Setting up your Organisation to Accept Coupons</li> <li>Setting up the Coupon Category</li> <li>Setting up the Coupon Type</li> <li>Setting up the Coupon Product</li> <li>Create the Coupon Bookable Product</li> <li>Importing Coupons</li> <li>Coupons Check List</li> </ul> </li> <li>Vouchers <ul> <li>Set your Organisation to Accept Vouchers</li> <li>Create the Voucher Variant Types</li> <li>Create the Voucher Payment Method</li> <li>Reviewing the Voucher availability in CRM</li> <li>Vouchers Checklist</li> </ul> </li> </ul>	3.6 and 3.7



User Guide:	Content:	Version:
Delivery	Options, Charges and Additional Cha	rges
Green 4 Ticketing Delivery Options, Delivery Charges and Additional Charges 3.6	<ul> <li>How to set up delivery options and additional charges <ul> <li>Introduction</li> <li>Setting up Delivery Options</li> <li>Setting up Delivery Products</li> <li>Setting up a Print at Home Delivery Product</li> <li>Step 1: Set up the Channel Price Lists</li> <li>Step 2: Create the Print at Home Delivery option Product</li> <li>Step 3: Setting Print at Home on the Delivery option Product</li> <li>Step 4: Setting Print at Home for the Venue</li> <li>Setting up Additional charges</li> <li>To set up the Channel for a Booking Charge</li> </ul> </li> <li>Using Multiple Addresses <ul> <li>Adding multiple addresses in the POS</li> <li>Select Delivery Address</li> </ul> </li> </ul>	3.6



User Guide:	Content:	Version:
Green 4 Ticketing Delivery Options, Delivery Charges and Additional Charges 3.7	<ul> <li>How to set up delivery options and additional charges (includes for additional charges for specific fixtures/series/events)</li> <li>Delivery Options and Charges <ul> <li>Introduction</li> <li>Setting up Delivery Options</li> <li>Setting up Delivery Products</li> <li>Delivery Option Requirements</li> <li>Setting up a Print at Home Delivery Product <ul> <li>Step 1: Set up the Channel Price Lists</li> <li>Step 2: Create the Print at Home Delivery option Product</li> <li>Step 3: Setting Print at Home on the Channel</li> <li>Step 4: Setting Print at Home for the Venue</li> </ul> </li> <li>Setting up Additional charges <ul> <li>To set up the Channel for a Booking Charge</li> <li>To set up an Event 9Fixture or Series) for an Additional Charges</li> <li>How Additional Charges are Displayed in the POS</li> </ul> </li> </ul></li></ul>	3.7



User Guide:	Content:	Version:
8	Gift Aid and Donations	2
Green 4 Ticketing Gift Aid and Donations User Guide	<ul> <li>How to set up Donation Products &amp; Gift Aid <ul> <li>Introduction</li> <li>Collecting Gift Aid</li> <li>Donations</li> </ul> </li> <li>Collecting Gift Aid <ul> <li>Setting up a Charity and Associated Fund(s)</li> <li>Flag Products for Gift Aid</li> <li>Declarations</li> <li>Creating Batches for Submission to HMR&amp;C</li> </ul> </li> <li>Donations <ul> <li>Setting up a Donation Product</li> <li>Using Donation Product Type- End Customer Defines Donation Amount</li> <li>Using Stock Product Type- Donation Amount is Predefined</li> <li>Shopping Basket Donation Process</li> <li>Payment Methods</li> </ul> </li> </ul>	3.7



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Ĵ <b></b> <u> <u> </u> </u>	Retail	
Green 4 Retail User Guide	<ul> <li>How to set up Retail Stock Products</li> <li>Introduction</li> <li>Setting up Retail Categories <ul> <li>Analysis Categories</li> <li>Variant Type Categories</li> <li>Variant Type Categories</li> <li>Images for Categories</li> <li>Creating a New Retail Product</li> <li>Set up your Channel Price Lists</li> <li>Setting up a Bookable Product</li> <li>Bookable Product VAT codes and VAT rates</li> <li>Bookable Product VAT codes and VAT rates</li> <li>Bookable Product Modifiers</li> <li>Adding an Image for the Retail Product</li> <li>Image Naming Convention</li> <li>Adding an Image</li> <li>Personalised Images</li> <li>Setting up a barcode for a retail product</li> </ul> </li> <li>Managing Stock <ul> <li>Enabling the Tracking of Stock</li> <li>Stock Movements</li> <li>Stock Transactions</li> <li>Product Variant Location Stock Levels</li> </ul> </li> <li>Picking and Dispatching</li> <li>Bookings Created</li> <li>Dispatch batch created</li> <li>Picking</li> <li>Goods Dispatched</li> </ul>	3.6



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	eCommunications	
Green 4 eCommunications – Version 4	How to set up and send email marketing campaigns <ul> <li>Introduction</li> <li>What's new?</li> <li>Email Marketing in CRM</li> <li>The Process</li> </ul> <li>Audiences <ul> <li>Marketing Lists</li> <li>Communication Audiences</li> <li>Communication Files</li> <li>Communication Templates</li> </ul> </li> <li>Communicating a Communication <ul> <li>Testing the Communication</li> <li>Statistics and Reporting</li> <li>Accessing Statistics</li> </ul> </li>	Ecomms Version 4



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	Food and Beverage	
Green 4 Food & Beverage User Guide	<ul> <li>How to set up Food and Beverage Products and selling them via tills</li> <li>Setting up Green 4 F&amp;B</li> <li>Setting up the F&amp;B Channel</li> <li>Setting up the kiosk/F&amp;B channel</li> <li>Setting up the Terminals</li> <li>Setting up a Printer and Transform</li> <li>Creating a Print Transform Record</li> <li>Setting up Payment Methods</li> <li>Using the tabs</li> <li>Channel Settings</li> <li>Adding Items to a new Tab in the POS</li> <li>Adding items to an existing Tab in the POS</li> <li>Settling up Products</li> <li>Create the Variant Types</li> <li>Create the Variant Types</li> <li>Create the Variant Price List</li> <li>Set up your Channel Price List</li> <li>Food and Beverage On-Sale Check List</li> <li>Product Categories/Variant Categories</li> <li>Creating an analysis category</li> <li>Purchasing Products using the Kiosk</li> </ul>	3.6 and 3.7



User Guide:	Content:	Version:
Green 4 Food and Beverage- Meal Deals User Guide	<ul> <li>How to set up Meal Deals in CRM and buy them on the POS, includes the set-up of Optional Extras</li> <li>Setting up Meal Deals in CRM</li> <li>1. Creating a Meal Deal that consists of a Specific Product but no Specific Variants</li> <li>Step 1. Create the Variant Type (Deal)</li> <li>Step 2. Create the Variant Price List</li> <li>Step 3. Set up your Channel Price List</li> <li>Step 4. Create the Meal Deals Bookable Product</li> <li>Overview</li> <li>The Meal Deal that consists of a combination of products with any Variants and Product specific Variants</li> <li>Step 1. Create the Variant Type (Deal)</li> <li>Step 2. Create the Variant Type (Deal)</li> <li>Step 4. Create the Variant Type (Deal)</li> <li>Step 5. Create the Variant Price List</li> <li>Step 1. Create the Variant Price List</li> <li>Step 3. Set up your Channel Price List</li> <li>Step 4. Create the Variant Type (Deal)</li> <li>Step 5. Create the Variant Price List</li> <li>Step 5. Create the Meal Deals Bookable Product</li> <li>Step 6. Create a Bookable Product to link to the Bookable Product to Modifier</li> <li>Step 7. Create Bookable Product to Modifier</li> <li>Step 8. Create the Options Variants</li> <li>Overview</li> <li>The Meal Deal in the POS</li> </ul>	3.7



User Guide:	Content:	Version:
	<ul> <li>Step 2. Create the Variant Price List</li> <li>Step 3. Set Up your Channel Price List</li> <li>Step 4. Create the Meal Deals Bookable Product</li> <li>Step 5. Create Bookable Products that are to be part of the Meal Deal</li> <li>Step 6. Create the Bookable Products Types</li> <li>Step 7. Create Bookable Product Modifiers</li> <li>Step 8. Create Option Variants</li> <li>Overview</li> <li>The Meal Deal in the POS</li> <li>Setting Up Optional Extras to add to a Meal Deal</li> <li>Step 2. Linking the Optional Extra as a Bookable Product</li> <li>Step 2. Linking the Optional Extras to the Meal Deal as a Bookable Product Modifier</li> <li>Overview</li> </ul>	



User Guide:	Content:	Version:
Y	Loyalty	Y
Green 4 Loyalty User Guide	<ul> <li>Introduction</li> <li>Loyalty Accounts <ul> <li>Loyalty Transactions</li> <li>Loyalty Redemptions</li> <li>Setting up Loyalty Periods</li> </ul> </li> <li>Setting up Loyalty Levels</li> <li>Setting up Loyalty Rules <ul> <li>Loyalty Transaction Source</li> <li>Loyalty Point Rules</li> <li>Loyalty Bonus Rules</li> <li>Loyalty Rewards</li> </ul> </li> <li>Season Ticket Buy-back, Loyalty set up. <ul> <li>Step 1. Create Two Loyalty Point Rules</li> <li>Step 2. Create Two Loyalty Point Rules</li> <li>Step 3. Run the Loyalty Rule Transaction Generation process</li> <li>Step 4. Creating a Loyalty Points Update</li> </ul> </li> </ul>	3.6 and 3.7



User Guide:	Content:	Version:
	Corporate Sales	350
Green 4 Corporate Sales Process User Guide	Describes the functionality available through Green 4 Corporate Sales Module <ul> <li>Introduction</li> <li>Application Layout</li> <li>Views</li> <li>Forms</li> </ul> <ul> <li>Contact and Account Management</li> <li>Create a Contact</li> <li>Edit a Contact</li> <li>Deactivate a Contact</li> <li>Create an Account</li> <li>Adding Contacts to an Account</li> <li>Edit an Account</li> <li>Deactivate an Account</li> <li>Deactivate an Account</li> <li>Deactivate an Account</li> <li>Viewing Open Activities</li> <li>Viewing Open Activities</li> <li>Viewing an Activity from workplace</li> <li>Creating an Activity from workplace</li> <li>Creating an Activity from a Contact or Account</li> <li>Set regarding for an Activity</li> <li>Assigning an Activity</li> <li>Follow up Telephone Calls</li> <li>Tracking Emails</li> <li>Breaking Contact and account relationships</li> </ul>	



User Guide:	Content:	Version:
	<ul> <li>Creating a Service Activity (to book a resource)</li> <li>Edit an Opportunity</li> <li>Adding Activities to Opportunities</li> <li>Close an Opportunity as Lost</li> <li>Quote Management</li> <li>Creating a Quote from an opportunity</li> <li>Revising a Quote</li> <li>Running Quote report</li> <li>Order Management</li> <li>Creating an order from a quote</li> <li>Creating an order from an opportunity</li> <li>Updating Service Activities</li> <li>Running Sales Order reports</li> <li>Creating an order to cancelled</li> <li>Products</li> <li>Create your price lists</li> <li>Add your products</li> <li>Link products to price list</li> <li>Services</li> </ul>	



User Guide:	Content:	Version:
	Multi-Currency & Cash Handling	
Green 4 Multi Currency & Cash Handling User Guide	<ul> <li>Describes the Setup and POS use of the Multi-Currency &amp; Cash Handling functionality</li> <li>Multi-Currency CRM Setup <ul> <li>Step 1. Create the Application Currency and Transaction Currency</li> <li>Step 2. Set the Application Currencies to the Company Details</li> <li>Step 3. Set the Change Paid Currency in the Company Details</li> <li>Step 4. Variant Price Lists</li> <li>Step 5. Payment Methods and Multi-Currency</li> <li>Step 6. Booking Payments and Multi-Currency</li> <li>Step 1. Selecting the Currency on the POS</li> <li>Step 2. Completing Payment and receiving Change.</li> </ul> </li> <li>Cash Handling</li> <li>Cash Handling CRM Setup</li> <li>Step 2. Select the Booking Operators who can act as a Witness</li> <li>Step 3. Setting the Till Pod Limit in the Channel.</li> <li>Step 4. Cash Handling Session Report Print Transform.</li> </ul>	3.7



User Guide:	Content:	Version:
	<ul> <li>Step 5. Terminal Float Sessions</li> <li>The POS and Cash Handling Use</li> <li>Step 1. Starting a Terminal Float Session</li> <li>Step 2. Till Loft/Till Drop/ Exchange</li> <li>Step 3. Cash Handling Report</li> <li>Step 4. Ending a Terminal Float Session</li> <li>Till Pod Limit.</li> </ul>	

\*End of Document\*