





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



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



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



User Guide:	Content:	Version:
O O	Infrastructure Set Up	0 0
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. Overview Company Details Setting up your Company Details Channels Creating a Channel Terminals Creating a Terminal Payment Methods Creating a Payment Method Linked Terminals Green 4 Test Payment Method Example Payment Method Channel EPOS and PDQ terminal Green 4 Test Booking Payment Example Direct Debit Creating a Payment Schedule Adding Payment Schedule Items Managing Direct Debit Payments in POS Managing Direct Debit Payments on the Web Viewing Bookings in CRM Submitting Payment Request to London Zurich Collecting Payment Responses Managing Gried Payments Step 1: Identify the Payment and Booking in CRM 	3.6



User Guide:	Content:	Version:
	 Step 3: Amend the Booking in POS Amending a Direct Debit Booking Cancelling a Direct Debit Booking Printers Creating a Printer Record Print Transforms Booking Operators Creating a Booking Operator Record. Allow Offline Working Set Your Organisations to Allow Offline Working Set up Terminals Set Up Off Line Payment Methods Set Up Off Line Bookable Products 	
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. Overview Company Details Setting Up Your Company Details Channels Creating a Channel Terminals Creating a Terminal Setting up the Access Gate in CRM Step 1: Setting up your Terminal Step 2: Setting up your Terminal Step 3: Creating the Access Point and Attendance Zones Step 4: Product Zones Creating a Payment Method Linked Terminals Payment Method Channel EPOS and PDQ Terminal 	3.7



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



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



User Guide:	Content:	Version:
	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. • 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 • Product Management – putting a product on sale • Overview • Variant Types • Variant Type Components • Variant Price Lists • Sales Plans • Placing a new Fixture On Sale • Step 1: Create the Fixture Sales Plan • Step 2: Create the Fixtures	3.6



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



User Guide:	Content:	Version:
	 Upselling Products (Additional Products) Setting up Products as Memberships Step 1: Membership Number Set Up Step 2: Setting Up your Channel Price List Step 3: Create the Bookable Product Entitlements Entitlements and the Channel Price Lists Entitlements and the Channels Miscellaneous The Bulk Set up of Many Products Set up for Multi Lingual using the Translation and Description fields Product Calendars 	
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:
	 Product Management – putting a product on sale Overview Variant Types Variant Type Components Variant Price Lists Sales Plans Placing a new Fixture on sale Step 1: Create the Fixture Sales Plans Step 2: Create the Fixtures Channel Price Lists Step 3: Create the Fixtures Step 4: Create a Series and add the Fixtures Step 5: Create the Fixture Bookable Product Fixture Ticket On Sale Check List Placing a new Series on Sale Step 1: Create the Series Sales Plans Step 2: Create the Series Channel Price Lists Step 3: Create the Series Sales Plans Step 3: Create the Series Step 3: Create the Series Step 3: Create the Series Step 5: Create the Series Bookable Product Series On Sale Check List Examples: using Sales Plans to set up a Series and Fixtures Setting up Away Fixtures and Travel Products The Process Step 1: Creating an Away Bookable Resource Step 2: Creating an Away Venue Step 3: Creating an Away Venue Step 3: Creating an Away Venue 	



User Guide:	Content:	Version:
	 Step 4: Creating an Away Venue Configuration Step 5: Create a Venue Configuration Block & Bookable Resources Step 6: Set up your Away Series and Fixtures Step 7: Capturing Away Ticket Information in the POS Setting up Stock Bookable Products Step 1: Set Up your Channel Price List Step 2: Create the Bookable Products Stock Product On-Sale Check List Upselling Products (Additional Products) Setting up Auto-Scheduled Bookable Products Step 1: Set up your Channel Price Lists Step 2: Create the Bookable Products Step 1: Set up your Channel Price Lists Step 1: Set up your Channel Price Lists Step 2: Create the Bookable Products Step 1: Set up your Channel Price Lists Step 1: Set up your Channel Price Lists Step 2: Create the Bookable Product Auto Scheduled Bookable Products Step 1: Set up your Channel Price List Step 3: Scheduled Bookable Products Step 3: Scheduled Product On Sale Check List Setting up Scheduled Product On Sale Check List Delayed Purchase of Scheduled and Auto Scheduled Products Setting up Reserve Capacity for Scheduled and Auto Scheduled Products (Reducing the capacity) Setting Up negative Reserved Capacity for Scheduled and Auto-Scheduled Products (Increasing the capacity) Setting up Products as Membership photo Step 1: Capturing a Membership photo 	



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



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



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



User Guide:	Content:	Version:
*	Promotions, Coupons and Vouchers	
Green 4 Ticketing Promotions, Coupons and Vouchers	 How to set up promotions, coupons & vouchers Promotions Creating a Promotions Record Setting up your Coupon Payment Method Setting up your Organisation to Accept Coupons Setting up the Coupon Category Setting up the Coupon Type Setting up the Coupon Product Create the Coupon Bookable Product Importing Coupons Coupons Set your Organisation to Accept Vouchers Create the Voucher Variant Types Create the Voucher Payment Method Reviewing the Voucher availability in CRM Vouchers 	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	 How to set up delivery options and additional charges Introduction Setting up Delivery Options Setting up Delivery Products Setting up a Print at Home Delivery Product Step 1: Set up the Channel Price Lists Step 2: Create the Print at Home Delivery option Product Step 3: Setting Print at Home on the Channel Step 4: Setting Print at Home for the Venue Setting up Additional charges To set up the Channel for a Booking Charge Using Multiple Addresses Adding multiple addresses in the POS Select Delivery Address 	3.6



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



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



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



User Guide:	Content:	Version:
	eCommunications	
Green 4 eCommunications – Version 4	How to set up and send email marketing campaigns Introduction What's new? Email Marketing in CRM The Process Audiences Marketing Lists Communication Audiences Communication Files Creating a Communication File Communication Templates Communications Creating the Communication Startistics and Reporting Accessing Statistics 	Ecomms Version 4



User Guide:	Content:	Version:
	Food and Beverage	
Green 4 Food & Beverage User Guide	 How to set up Food and Beverage Products and selling them via tills Setting up Green 4 F&B Setting up the F&B Channel Setting up the F&B Channel Setting up the terminals Setting up a Printer and Transform Creating a Print Transform Record Setting Up Operators Setting up Payment Methods Using the tabs Channel Settings Payment Methods Settings Adding Items to a new Tab in the POS Adding items to an existing Tab in the POS Setting up Products Create the Variant Types Create the Variant Price List Set up your Channel Price List Create the Bookable Product Food and Beverage On-Sale Check List Product Categories/Variant Categories Creating an analysis category Purchasing Products using the Kiosk 	3.6 and 3.7



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



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



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Y	Loyalty	Y
Green 4 Loyalty User Guide	 Introduction Loyalty Accounts Loyalty Transactions Loyalty Redemptions Setting up Loyalty Periods Setting up Loyalty Veriods Setting up Loyalty Rules Loyalty Point Rules Loyalty Bonus Rules Loyalty Rewards Season Ticket Buy-back. Loyalty set up. Step 1. Create Two Loyalty Point Rules Step 2. Create Two Loyalty Point Rules Step 3. Run the Loyalty Rule Transaction Generation process Step 4. Creating a Loyalty Points Update 	3.6 and 3.7



Green 4 Corporate Sales Process User Guide 0 Introduction 0 Introduction 0 Contact and Account Management 0 Forms 0 Contact and Account Management 0 Create a Contact 0 Contact and Account Management 0 Contact and Account Management 0 Create a Account 0 Contact and Account Management 0 Contact and Account 0 Contact and Account 0 Contact a Account 0 Deactivate a Contact 0 Contact an Account 0 Deactivate a Contact 0 Deactivate a Contact 0 Deactivate an Account 0 De	User Guide:	Content:	Version:
Green 4 Corporate Sales Sales Module Process User Guide • Introduction • Application Layout • Views • Forms • Contact and Account Management • Create a Contact • Create a Contact • Edit an Account • Deactivate a Contact • Create an Account • Adding Contacts to an Account • Edit an Account • Edit an Account • Deactivate an Account • Edit an Account • Adding Contacts to an Account • Edit an Account • Activities • Viewing your Activities • Viewing Open Activities linked to a Contact or an Account • Viewing Open Activities linked to a Contact or an Account • Viewing an Activity History • Creating an Activity from workplace • Creating an Activity from a Contact or Account • Set regarding for an Activity • Set regarding for an Activity • Set regarding for an Activity • Follow up Telephone Calls • Tracking Emails	3	Corporate Sales	350
 Breaking Contact and account relationships Managing Opportunities Capture an opportunity 		Sales Module • Introduction - Application Layout - Views - Forms • Contact and Account Management - Create a Contact - Edit a Contact - Deactivate a Contact - Oreate an Account - Create an Account - Adding Contacts to an Account - Edit an Account - Edit an Account - Edit an Account - Deactivate an Account - Edit an Account - Viewing your Activities - Viewing Open Activities - Viewing Open Activity from workplace - Creating an Activity from workplace - Creating an Activity from a Contact or Account - Set regarding for an Activity - Assigning an Activity to another user - Completing an Activity - Follow up Telephone Calls - Tracking Emails - Breaking Contact and account relationships	



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



User Guide:	Content:	Version:
	Multi-Currency & Cash Handling	
Green 4 Multi Currency & Cash Handling User Guide	 Describes the Setup and POS use of the Multi-Currency & Cash Handling functionality Multi-Currency CRM Setup Step 1. Create the Application Currency and Transaction Currency Step 2. Set the Application Currencies to the Company Details Step 3. Set the Change Paid Currency in the Company Details Step 4. Variant Price Lists Step 5. Payment Methods and Multi-Currency Step 1. Selecting the Currency on the POS Step 2. Completing Payment and receiving Change. Cash Handling CRM Setup Step 1. Setting the Operator and Witness Pin in the Company Details Step 3. Setting the Till Pod Limit in the Channel. Step 4. Cash Handling Session Report Print Transform. 	3.7
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	 Step 5. Terminal Float Sessions The POS and Cash Handling Use Step 1. Starting a Terminal Float Session Step 2. Till Loft/Till Drop/ Exchange Step 3. Cash Handling Report Step 4. Ending a Terminal Float Session Till Pod Limit. 	

End of Document