CRM 2015

INFRASTRUCTURE SETUP

USER GUIDE

V3.7

green4
SOLUTIONS

THE QUEEN'S AWARDS
FOR ENTERPRISE:
2014

CONTENTS

ABOUT THIS DOCUMENT

This document has been prepared as a User Guide for the Infrastructure Set Up of CRM 2015.

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DOCUMENT CONTROL

Version	Date	Change	Initials
V1.0	24/06/2015	This is a new document	JW
V1.1	16/09/2015	Updated with new Multi-Currency and Cash Handling Fields	JW

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INFRASTRUCTURE- OVERVIEW

This document provides guidance on how to set-up CRM in order to use many of the Green 4 solutions. The items covered in this document are typically setup once and may need only slight amendment over the course of time. The sections covered are outlined in the diagram below.

It must be noted that many of the fields displayed in this Infrastructure Setup User Guide may not be completed for your organisation often only relating to the enablement of certain functionalities. This document therefore gives a

INFRASTRUCTURE SET UP

INFRASTRUCTURE

1. COMPANY DETAILS

The Company Details only need to be set up once within CRM. Depending on the functionality available on your system, only certain fields may need to be completed within this form.

2. CHANNELS

Channels are used to identify the channel that sales are to be made. Multiple Channels can be created within CRM such as a Web, POS or Third Party Channel. Within the Channel form, different functionality can also be controlled.

3. TERMINALS

Terminals represent the physical points used to sell products, such as tills. A Terminal will need to be created for each of these points. Even if using the internet to sell products, a Web Terminal must also be created.

4. PAYMENT METHODS

Multiple Payment Methods can be added and linked to the Channel products.

A range of Payment Methods can be created such as Cash, Card, Direct Debit and Invoice.

5. PRINTERS

Printers are set up within CRM to control the different printing options, for example when printing tickets or receipts.

Printer records and transforms can also be created.

6. BOOKING OPERATORS AND GROUPS

Every Operator must be added to the CRM system as a Booking Operator. This will allow them to log directly onto the POS with specific log in details. Third Party Logins can also be created with the use of Operators and Groups.

7. THE ACCESS GATE

The Access Gate functionality allows access to be controlled via the POS. This means entry to a venue can be controlled at a till point.

8. OFFLINE WORKING

Offline Working allows you to continue to use the POS terminal if the internet connection temporarily fails. Naturally, functionality when offline may become limited to designated products and Payment Methods.

broad overview and description of the fields displayed in every form. Other Green 4 user guides, which explain how to enable specific functionality, will give more precise detail on the fields which must be completed.
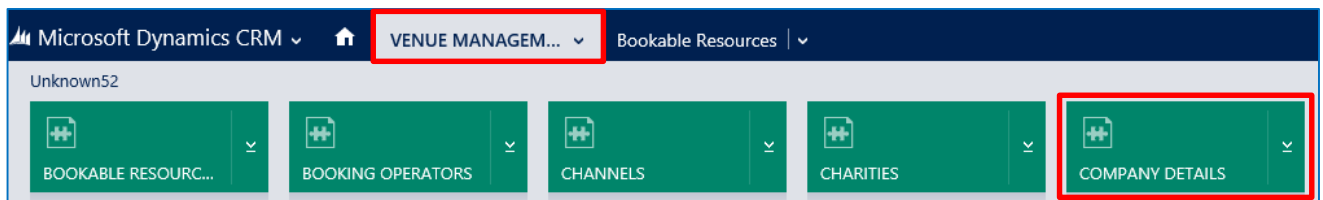
1. COMPANY DETAILS

Only one Company Details form needs to be set up within each CRM system. The Company Details form allows general information relating to the organisation using the system to be entered, as well as also controlling some additional specific functionality. Although the Company Details form is vital, depending on which Go modules are available to you, then only certain fields may be relevant.

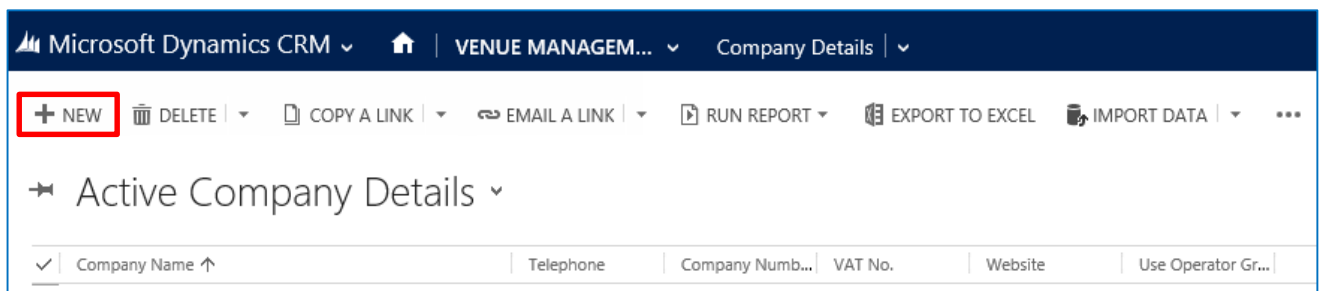To set the Company Details, complete the following:

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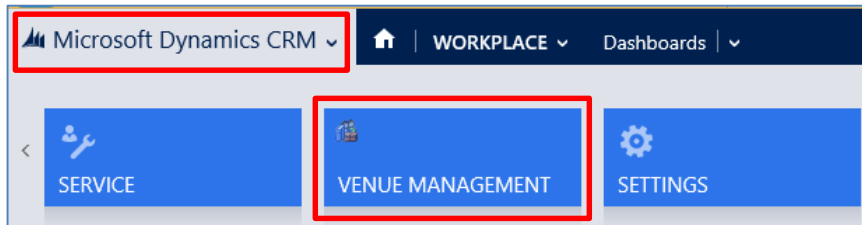
b) Next select the **Venue Management** tab in the navigation bar and from the drop down choose **Company Details.**

c) The Active Company Details page will be shown, select **New** in the ribbon.

d) A New Company Details form will be displayed. The following fields will be shown, but only those relevant to the functionality available to your Go modules will need completing:

General

- **Company Name.** Enter the full Company name

- **Company Address.** Enter the address of the Company.

- **Region.** Enter the region of the Company.

- **City**. Enter the City of the Company.

- **Postal Code**. Enter the Company's Postal Code.

- **Country**. Enter the Country of the Company.

- **Telephone.** Enter the main telephone number for the company.

- **Website.** Enter the Company's website address.

- **Company Number.** Enter the Company Number.

- **VAT No.** Enter the Company's VAT number.

Sales Plans

- **Current Sales Plan.** Use the Look up to find and add the Sales Plan that is to be associated with the Company Details. This must be a Sales Plan type of Other.

- **Test Sales Plan.** Use the Look up to find and add a Test Sales Plan that is to be associated with in the Company Details. Again this must be a Sales Plan type of Other.

Access Control

- **Access Control Provider.** If applicable, use the Look up to find and add the default Access Control provider to be used by the company

Customer Reference Number

- **Starting Number.** Enter the start number of any Customer References

- **Number Format.** Enter the letters required to prefix the Customer Reference number and format of the number. For example:

    - To generate ABC1, ABC2 etc. - **Starting Number** = 1. **Number Format** = ABC{0}.

    - To generate CFE0000001, CFE0000002 etc. – **Starting Number** =1. **Number Format** = CFE {0:0000000}.

    - To generate G41000, G41001, G41002, etc.- **Starting Number** = 1000 and **Number Format** = G4{0:0000}

Options

- **Use Operator Groups.** If set to **Yes** Booking Operators are allowed to log into the Channels defined by their Operator Groups only.

- **Use Coupons,** Set to **Yes** if Coupons are to be used on the system.

- **Use Vouchers**. Set to **Yes** of Vouchers are to be used on the system.

- **Allow Offline Mode**. Set to **Yes** if offline mode can be used by the organisation. (See the Offline Working section for more details).

- **Generate Contact Ext Reference.** Select **Yes** if an external contact reference is to be generated.

- **Default Print Option.** Choose the Default Print Option from the drop down and choose from Wizard, Ticket or Receipt.

- **Membership Number Auto Generated.** Used in relation to Membership products, select **Yes** for the Membership number to be auto generated or select **No** to enable the Membership number to be captured manually.

- **Load Bowling UI.** Related to bowling and not ticketing this field will determine if the Bowling UI should be loaded.

- **Display Find Seats Tab.** Select **Yes** for the Seat Tab to be displayed in the POS. This will allow seats to be found in relation to a Series, Fixture and/or Block.

- **Booking Details Window Renew Membership.** If this is set to **Yes** this field will show in the POS all members so that Memberships can be renewed in the booking details area.

- **Contact Mobile Is Required.** Select **Yes** of the customer mobile number must be taken when collecting a purchaser's data.

- **Sell Fixtures and Series.** Select **Yes** if Fixtures and Series can be sold.

- **Ticket Reprint Behaviour.** Select the default print option from the drop down list.

- **Allow Additional Payments After Finance.** This field is related to the First Payment & Direct Debit Mandate functionality**.** Setting this flag to **Yes** will allow further additional payments to be added to a booking after a payment method of finance such as direct debit has been used.

Shopping Cart Panel Options

- **Display Comment Panel (SCP).** Select **Yes** to show the Comment panel at the top of the shopping cart.

- **Display Product User Button (SCP).** Select **Yes** to display the Beneficiaries button on the shopping cart.

- **Display Print Button After Print Success (SCP).** Select **Yes** if the Print buttons are to be disabled once tickets have been successfully printed.

- **Display print Wizard Button (SCP).** Select **Yes** to display the shopping cart panel print wizard button.

- **Display Seats in Cart Item (SCP).** Select **Yes** to display seat numbers in the shopping cart.

- **Show Upgrade Button (SCP).** Select **Yes** if the upgrade button is to be displayed alongside the products that have been added to the shopping cart.

- **Enable Print Button After Full Payment (SCP).** Select **Yes** if the print button is to be enabled once payment has been received.

Cross Sell Products

- **Cross Sell Page Heading.** If using the Cross Sell functionality enter a cross sell product page header which will be displayed on the Channel. An example of a Cross Sell Page Heading may be 'Why not upgrade your selection?'

- **Cross Sell Page Sub Header.** If using the Cross Sell functionality enter a cross sell page sub heading which will be displayed. An example of a Cross Sell page sub header may be 'Take advantage of the following upgrades.'

Default Settings for Season Ticket Buybacks

- **Buy-back used.** If the buyback functionality is not to be used, select **No**. If the buyback functionality is to be available on the POS or/and the Web ensure that **Yes** is selected.

- **Release buy-backs.** If the buyback functionality is to be used, select **On demand,** if offered-up seats will not be shown for general sale. 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).** If the buyback functionality is to be used, 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, buyback changes could not be made for this fixture if the current time is greater than 03:00.

- **Total points per buy-back.** If the buyback functionality is to be used, 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 Step 4: Setting a Loyalty increment to the Block for an example of how this loyalty increment is applied.)

- **Points per offer (% of total points).** If the buyback functionality is to be used, 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 for all offered-up tickets, once a fixture has been completed.

- **Points per purchase (% of total points).** If the buyback functionality is to be used, enter the default percentage of the **Total points per buy-back** which are credited to the loyalty account when an offered-up ticket has been **purchased**. These points are credited for all offered-up tickets which have been purchased, once a fixture has been completed.

Card options

- **Allow ticket in card.** If adding tickets onto Season Ticket cards select **Yes** to enable the assigning of fixtures to a valid season ticket in the Edit beneficiaries screen. Select **No** if fixtures cannot be assigned to a valid Season Ticket, meaning the card drop-down will not be shown in the Edit beneficiaries' screen.

- **Allow alternative seat on card.** If adding tickets onto a Season Ticket card select **Yes** to allow fixture tickets which may have a different block, row and seat to be assigned to the Season Ticket. Select **No** to only allow fixtures with the same block, row and seat to be assigned to a Season Ticket with the same block, row and seat.

Access point

- **Access validation success period (ms).** If using the Access Gate, enter the number of seconds that the Access Gate will show when validation has been a success.

- **Access validation failed period (ms).** If using the Access Gate, enter the number of seconds that the Access Gate will show when validation has failed.

- **Anti pass back period (minutes).** If using the [Access Gate](#), enter the Anti-pass back period in minutes.

Payments

- **Change paid currency.** If using the Multi Currency functionality, use the magnifying glass to Look Up and select the Application Currency that change will be given in.

Terminal Float Session Option

- **Operator Pin Required.** If using the Cash Handling functionality, select **Yes** if a pin is required to be entered into the POS when an operator puts money into or takes money out of the till. Select **No** if a pin is not required for this process.

- **Witness Pin Required.** If using the Cash Handling functionality, select **Yes** if a pin is required to be entered into the POS by a witness when an operator puts money into or takes money out of the till. Select **No** if a pin is not required for this process.

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

2. CHANNELS

Channels are used to identify the Channel that sales are made. Multiple Channels can be created within CRM such as a Web, POS or Third Party Channel. This means that products created can be sold on different sets of Channels. Within the Channel form, different functionality can also be controlled, for example it may be possible for certain functionality to be available on the Web Channel compared to the POS.

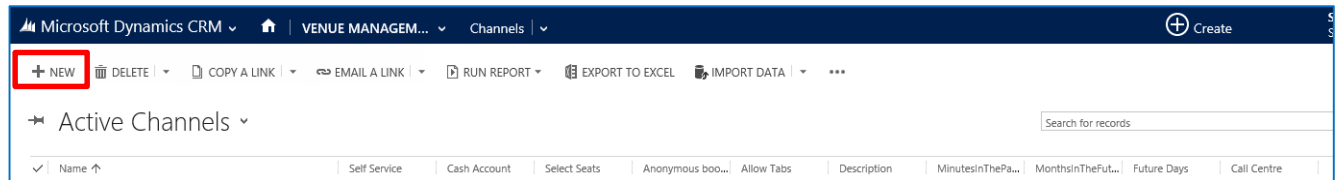To create a new Channel, complete the following.

a) Within CRM, select the **Microsoft Dynamics CRM** tab in the navigation bar before scrolling across and choosing **Venue Management** from the drop down.
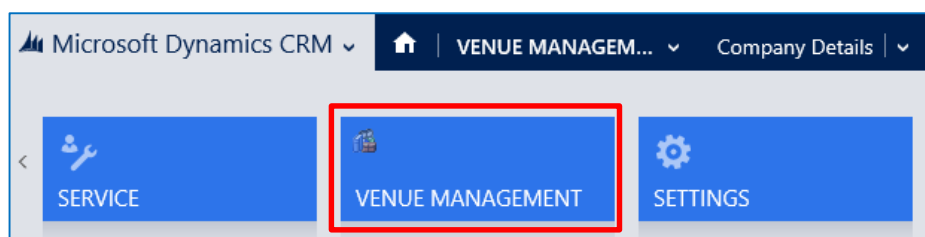
b) Next select the **Venue Management** tab in the navigation bar and from the drop down choose **Channels.**
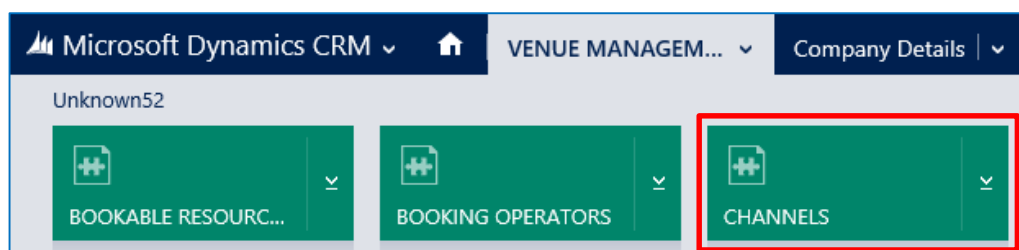
c) A list of Active Channels will be displayed, select **New** in the ribbon.

d) A Channel form will be displayed. The following fields will be shown, although only those relevant to the functionality available to your Go modules will need completing.

Bowling Settings *(These are only required for Bowling sites)*

Stadium View Options

- **Show Stadium Options.** Select **Yes** to show the options for Fixtures and Series on the POS home screen.

- **Stadium Options View.** If the **Show Stadium Options** flag has been set to **Yes**, choose from the drop down if the Fixture, Series and Other options are going to show as **Tabs** or alternatively as **Buttons** on the POS.

- **Default Tab.** If the Stadium Options View selected is Tabs, from the drop down choose if Fixture, Series or Other is going to be the default Tab that will be displayed on the POS.

Tabs (Typically used for F&B implementations).

- **Allow Tabs.** Select **Yes** if purchases can be made via tabs on the Channel

- **Tab Pincodes.** Enter **Yes** if the user will be required to enter a pin to allow the adding of products to a Tab.

- **Tab Limit.** Enter the upper limit for Tabs opened using the Channel.

- **Stock Products Only.** Select if only Stock products can be added to a Tab.

Cash Handling

- **Till Pod Limit.** If using the Cash Handling functionality, enter the price in which when the tills reaches this figure a warning will be displayed, pre-empting for the till to be emptied.

- **Session Turns on Cash Handling.** If using the Cash Handling functionality, enter the number of bookings that have to be made for a Till Pod Limit Warning message to appear on the POS. For example, if 3 is entered and the Till Pod Limit has been exceeded, a message asking for a till pod lift to be carried out will be shown after every 3 bookings made on the POS.

- **Till Pod Limit Warning.** If using the Cash Handling functionality, if set to **Yes**, when the POS is opened the Terminal Float Session window will automatically be displayed if there is no current Terminal Float Session taking place.

Settings

- **Settings.** Enter any additional settings relating to the Channel.

General

- **Name.** Enter the name of the Channel, e.g. POS or web.

- **Description.** Enter a description of the Channel.

- **Select Seats.** Select if the user will be able to select seats when using the Channel rather than having seats auto allocated.

- **Anonymous Booking.** Select **Yes** if Anonymous Bookings are allowed via the Channel. If this option is selected bookings can be made without having to select a contact as the purchaser, instead though a contacts name must be entered. For example, this option should be selected for Channels used for Match Day ticket sales.

- **MinutesInThePast.** Enter the number of minutes after the event has started the Channel can be used to purchase tickets.

- **Call Centre.** Select **Yes** if the Channel is a call centre Channel. When the Call Centre Channel is created, the POS will log the user out automatically once a booking has been completed (rather than waiting for the time out period to pass).

- **Display Cashless Tab.** Select **Yes** to display the Cashless Account tab.

- **External reference search.** Select **Yes** to have the External reference search displayed in the POS. Note: this is the Customer Reference field.

- **Product user booking search.** Select **Yes** to have the product user booking search displayed.

- **Contact Required Fields.** Enter the fields required when a purchaser's information is collected. Fields should be entered in a comma separated list, for example, First Name, Last Name, Email.

- **Enable Customer Editing.** Select **Yes** to allow customers to be edited.

- **Product User Required Fields.** Enter the fields required when a beneficiary's information is collected. Fields should be entered in a comma separated list, for example; First Name, Last Name, Email.

- **Allow Partial Series.** Select **Yes** if customers are able to purchase partial series tickets.

- **Select Delivery Address.** Select **Yes** if you are using the multiple addresses functionality. If this option is selected the address picker dialog will be displayed when the user selects to pay (after the purchaser details have been entered), allowing the user to pick the address the tickets will be sent to.

- **Enable Print at Home.** Select **Yes** if the Channel is to have a Print at Home option.

- **Show Beneficiary Entitled User**. Select **Yes** for the beneficiary window to display entitled users as well as the beneficiary.

- **Request Product User Info After Payment.** Linked to Membership products and if a camera is linked to the terminal. 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.

- **Assign Purchaser as first product user.** Used only for the POS Channel. Select **Yes** for the purchaser to be added as first product user.

- **Expand All Product User Limits.** Used only for the POS Channel. A button (Show/Hide) on the Edit Beneficiaries dialog of the POS allows the individual panels to be collapsed or expanded for better usability. This setting allows the user to define the number of product users in a booking before minimising them in the UI. Enter the number that limits the amount of Product Users shown in the expanded format.

- **Cash Account.** Use the Look up to enter a cash account if the speed checkout option is to be available via the Channel. Speed checkout allows the user to complete the check out without collecting information from the customer.

- **Self Service.** Select if the Channel will be used directly by the shopper (rather than through an employee of your organisation).

- **Future Days.** Enter the number of days before the event the Channel can be used to purchase tickets.

- **MonthsInTheFuture.** Enter the number of months before the event the channel can be used to purchase tickets.

- **Floor Limit.** Enter the limit on cashless spending before authorisation must be obtained.

- **Display Memberships Tab.** Select **Yes** to display the Membership tab.

- **Display Other tab.** Select **Yes** to display the Other tab.

- **Display card registration tab.** Select **Yes** to have the card registration tab displayed.

- **Hide Promo Button.** Select **Yes** to hide the **Promotion** button in POS. The Discount and Promos button will continue to be displayed.

- **Enable Customer Adding.** Select **Yes** to allow new customers to be added.

- **Allow Series Seats to be Changed.** Select **Yes** if customers are allowed to move, upgrade or print an individual fixture ticket bought as part of a series.

- **Display Bookings in Unfulfilled Tab.** Select **Yes** to display the unfilled orders tab in the POS. Not used in Green 4 Ticketing.

- **Allow Quick Cancel.** Select **Yes** to allow a booking search to be amended or cancelled.

- **Membership Number Read Only.** For membership products select **Yes** if Membership numbers are to be manually captured or select **No** if they are to be auto generated.

- **Ticket buyback un offered period.** If the ticket buy back process is set up, enter the period that the buy backs will be allowed.

Payment Defaults

- **Send Customer Booking Confirmation.** Select **Yes** if you wish booking confirmations to be automatically sent to customers.

- **Open Till.** Select **Yes** if you wish the till to be opened automatically when payment is taken.

- **Refund Authorisation Required.** Select **Yes** if authorisation is required when a refund is issued.

- **Print Receipt.** Select **Yes** if you wish to print a receipt automatically.

- **Close Booking if Paid.** Select **Yes** if you wish the booking details to be automatically closed once full payment has been taken.

- **Validate Delivery Product.** Select **Yes** if the delivery product needs to be validated. This relates to web bookings only.

Contact

- **Allow Bulk Email.** Select **Yes** to display the Allow Bulk Email question on the Purchaser dialog.

- **Terms Acceptance Required.** Select **Yes** if T&C's acceptance is required.

- **Collect Referred from Attribute.** Select **Yes** to display the 'Where did you hear about us?' drop down on the Purchaser dialog.

- **Activation Required.** Select **Yes** if the Contact requires activation.

Add Family Beneficiary

- **Contact details required.** When selecting the Add Family Beneficiary (+F) if this flag is set to **Yes** this will ensure that an email address or a phone number is required for the added family beneficiary. If the flag is set to **No** an email address or a phone number will not be required.

Behaviours

- **Offer Additional Products.** Select **Yes** if upsell products are to be offered via the Channel.

- **Do not create stock transactions**. Set to **Yes** if stock transactions must be created when stock products are sold or manual stock transactions are created.

- **Return Stock Levels.** Set to **Yes** if stock levels need to be returned on the POS against the stock product being offered for sale.

Away Tickets

- **Away Ticket Details to Record**. If away ticket details are to be recorded in the POS and additional fields are required, the following comma (',') separated list needs to be added to this field.

  g4b_TicketReferenceNumber,g4b_awayblockid,g4b_row,g4b_seat,g4b_SeatPostfix

  This will ensure the Away Block names are contained in a drop down list in the POS and that row and seat fields are available.

Donations

- **Donation Product.** If the Shopping Basket Donation process and a related product have been set up, use the Look Up to select the donation type product that will be offered.

- **Donation Percent**. The percentage captured in this field will calculate the suggested donation amount which will be a percentage of the total booking value. For example, if 20.00 is entered in this field, the suggested shopping basket donation will be calculated as Booking Value /100 * 20%. This amount can be changed or cancelled by the end customer.

  If this field is left blank, the Shopping Cart Donation process will use the amount entered in the **Default Donation Amount** field that is set up against donation Bookable Product.

Cross Sell Products

- **Display Cross Sell Products.** If a cross sell product is to be used on this channel ensure that this box is set to **Yes.**

Season ticket buy-backs

- **Ticket buyback un-offered period.** If the buyback functionality is to be used enter a number (in minutes) which 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 **Yes** on the Customer Details form, the offered ticket would not appear for general sale until the current time is greater than 14:59.

e) Once the details are complete, select **Save and Close** on the ribbon.
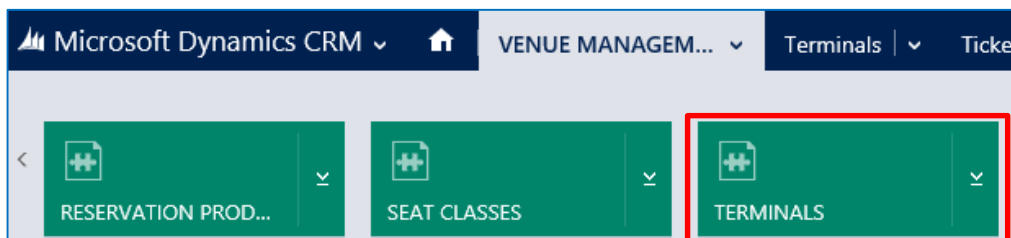
3. TERMINALS

Terminals represent the physical points, such as Tills, which are used to sell products. A Terminal will need to be created for each of these points and even if using the internet to sell tickets, a Web Terminal must also be created.

To create a new Terminal, complete the following.

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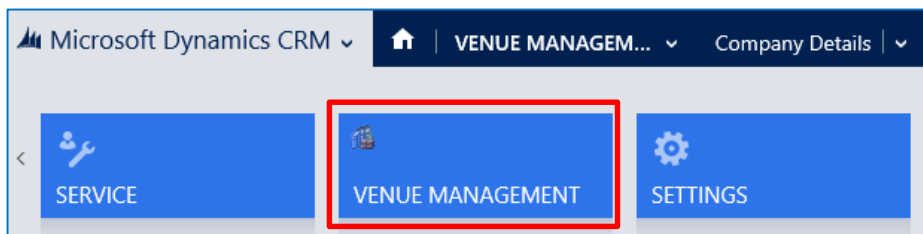
b) Next select the **Venue Management** tab in the navigation bar and from the drop down choose **Terminals.**

c) A list of Active Terminals will be displayed, select **New** on the ribbon.
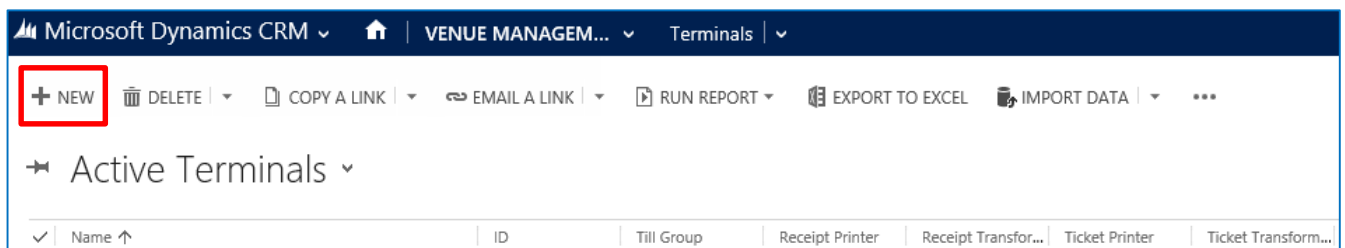
d) A Channel form will be displayed. The following fields will be shown, only those that are relevant to the functionality available to your Go modules will need completing.

General

- **Name.** Enter a name for the Terminal.

- **Owner.** The owner field will be automatically filled with your CRM user name.

- **ID.** Enter an identification number for the till. The ID will be used by the system to identify the Terminal.

- **Till Group.** Use the Look Up to find and add a group of tills for reporting purposes. This is also recommended for easier management of the Terminals, for example all admission terminals may sit under an Admission Till Group.

Default Printer Details

- **Ticket Printer.** Use the Look Up Records dialog to select the printer the Terminal will use to print tickets. Leave blank if the Terminal is not attached to a suitable ticket printer, for example if defining a Terminal for a web site.

- **Receipt Printer.** Use the Look Up Records dialog to select the printer the Terminal will use to print receipts. Leave blank if the Terminal is not attached to a suitable printer, for example if defining a Terminal for a web site.

- **Till Report Printer.** Use the Look Up Records dialog to select the printer the Terminal will use to print till reports. Leave blank if the Terminal is not attached to a suitable printer, for example if defining a Terminal for a web site.

- **Voucher Printer.** Use the Look Up Records dialog to select the printer the Terminal will use to print vouchers. Leave blank if the Terminal is not attached to a suitable printer, for example if defining a Terminal web site.

- **Member Card Printer.** Use the Look Up Records dialog to select the printer the Terminal will use to print members cards. Leave blank if the Terminal is not attached to a suitable printer, for example if defining a Terminal web site.

- **Session Report Printer.** If using the Cash Handling functionality, use the magnifying glass to search and look up the Printer that is going to be used to print out the Cash Handling Session Report

- **Ticket Transform.** Use the Look Up Records dialog to select the print transform (template) the Terminal will use when printing tickets. Leave blank if the Terminal is not attached to a suitable ticket printer, for example if defining a Terminal for a web site.

- **Receipt Transform.** Use the Look Up Records dialog to select the print transform (template) the Terminal will use when printing receipts. Leave blank if the Terminal is not attached to a suitable printer, for example if defining a Terminal for a web site.

- **Till Report Transform.** Use the Look Up Records dialog to select the print transform (template) the Terminal will use when printing till reports. Leave blank if the Terminal is not attached to a suitable ticket printer, for example if defining a Terminal for a web site.

- **Voucher Transform.** Use the Look Up Records dialog to select the print transform (template) the Terminal will use when printing vouchers. Leave blank if the Terminal is not attached to a suitable ticket printer, for example if defining a Terminal for a web site.

- **Member Card Transform.** Use the Look Up Records dialog to select the print transform (template) the Terminal will use when printing members cards. Leave blank if the Terminal is not attached to a suitable ticket printer, for example if defining a terminal for a web site.

- **Session Report Transform.** If using the Cash Handling functionality, use the Look Up Records dialog to select the print transform (template) the Terminal will use when printing Cash Handling Reports.

- **Disable Full Screen Mode.** The Go POS and Kiosk can run in full screen mode preventing the user from editing the screen size or closing the application using the Windows buttons in the top right hand corner. If you wish the terminal to run in full screen mode select **False**.

- **Seat Picker Wide Screen.** Select **Yes** if you want the shopping cart to be hidden when the seat picker screen is displayed. By hiding the shopping cart more space will be available to display the seats available.

- **Menu Board Attached.** Select **Yes** if a menu board is attached to the terminal. The menu board will display offers and products available via the terminal. The use of the menu board is covered in greater detail in the Green 4 Food & Beverage guide.

- **Force Offline.** Select **Yes** to force the terminal into offline mode.

- **Session Timeout (Minutes).** Enter the timeout period of the Terminal. The application will lock if the Terminal is inactive for the timeout period entered. For example, if 10 is entered, the application will lock after 10 minutes of inactivity.

- **Is Till.** Select **Yes** if creating a kiosk terminal. Kiosk terminals are used to sell stock products only and can use a more graphical display of products. The use of the kiosk is covered in greater detail in the Green 4 Food & Beverage guide.

- **Scanned Input Threshold (ms).** Barcode / Wedge scanner configuration setting.

Offline Mode Settings

- **Last Synced.** The date the terminal was last synchronised. This will be blank if the Terminal is not set up to function offline.

- **Offline Till ID.** The terminals offline till ID. This field should be left blank unless using offline working.

- **Archive Days.** Enter the number of days' worth of information which will be archived for offline working.

- **Offline Purchase Window (hours).** Enter the purchase window in hours for offline working.

- **Sync Interval (minutes).** Enter the sync interval for offline working.

- **Days to download.** Enter the number of days' worth of information to download for offline working.

Access Point. For more information on the Access Gate see section 7 The Access Gate.

- **Display Access Gate Tab.** If using the Access gate functionality, select **Yes** for the Access Gate tab to be displayed on the POS. If **No** is selected the Access Gate will not be displayed on the POS.

- **Gate Reader Details.** If using the Access gate functionality, this field is used for the gate reader details to allow details to be entered with cards, for example; ;nPort_Dev1=SMR,COM2.

- **Gate Service Location.** If using the Access gate functionality, enter the Gate Service Location URL.

- **Gate Tab Columns.** This field is currently not applicable.

- **Gate Tab rows.** This field is currently not applicable.

- **Access Points.** If using the Access gate functionality, use the Look Up to select the relevant Access Point for this terminal.

Peripheral Devices

- **Card Reader Attached.** Select **Yes** if a card reader is attached to this Terminal

- **Card Reader Name.** Enter the name of the attached card reader.

Zonal Settings (Note: Utilised by TOBC)

- **Ledger Service Location.** Not currently applicable.

Camera

- **Camera URL.** If a camera is linked to the Terminal, enter the URL.

- **Camera Refresh Rate.** Enter the refresh rate for the attached camera.

Debug

- **Service Proxy Logfile.** Not currently applicable.

e) Upon completing the details, select **Save and Close** in the ribbon.

4. PAYMENT METHODS

Multiple Payment Methods can be added and linked to each Channel that products are sold on. A range of Payment Methods can be created such as Cash, Card, Voucher, Direct Debit and Invoices. Each Payment Method will require different parts of the Payment Method to be completed. A Direct Debit Payment Method also requires additional setup to take place. A single type of Payment Method only needs to be created within the CRM system once.

CREATING A PAYMENT METHOD

Firstly the Payment Method itself must be created, for example Cash, Card or Direct Debit. Only one of each type of Payment Method that is to be used on your system needs to be created.

To create a Payment Method, complete the following:

a) Within CRM, select the **Microsoft Dynamics CRM** tab in the navigation bar before scrolling across and choosing **Venue Management** from the drop down.
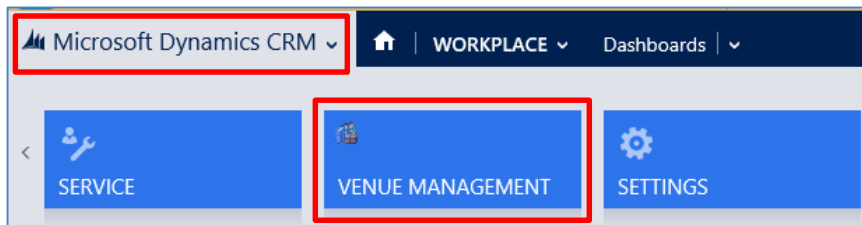
b) Next select the **Venue Management** tab in the navigation bar and from the drop down choose **Payment Methods.**
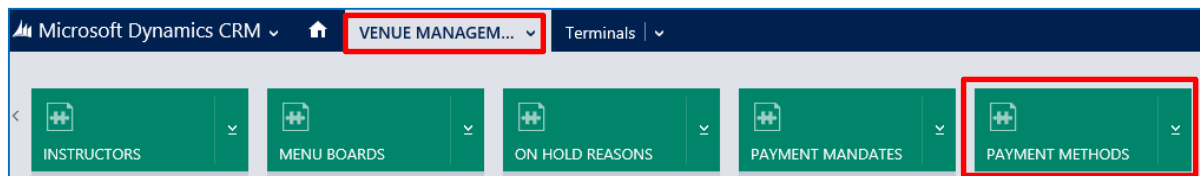
c) The Active Payment Methods view will be displayed, select **New** on the ribbon.
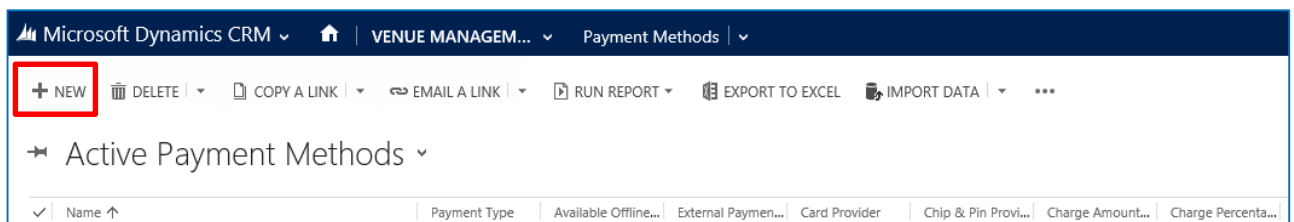
d) A New Payment Method form will be displayed, depending upon the type of Payment Method that is being created, different fields within the form need completing. For information on these fields see the Payment Method Examples section.

General

- **Name.** Enter a name for the Payment Method. The name will be displayed on the Channel when the payment is being made, for example Cash, Card or Direct Debit

- **Payment Type.** Use the drop-down list to select the type of Payment Method that is being created, e.g. Card, Cash, Chip and Pin. For Direct Debit select Finance.

- **External Payment ID.** If applicable, enter the external id for the payment method.

- **Set Amount to Booking Total.** Used in conjunction with Auto Pay field. Set to **Yes** if the payment amount should automatically be set to booking total.

- **Sequence Number.** The sequence number will determine the order in which payment methods are displayed.

- **Post.** If applicable, this can be used as the URL with which to post the initial payment data. Typically a card payment service URL.

- **Error Redirect.** If applicable enter the URL that will acts as a redirect if an error occurs.

- **Auto Advance Days**. For auto payment types, optionally specify the number of days in advance of nominal payment date when the payment should be submitted.

- **Code.** Enter a code for the payment method type if required.

- **Allow optional currency payment.** If using the Cash Handling functionality, select **Yes** for a drop down to appear in the Payment Method area of the POS where it is possible to select a different currency to complete the payment in.

- **Description.** Enter a short description of the Payment Method.

- **Available Offline.** Select **Yes** if the payment method is to be available offline. See section 8 Offline Working for more details.

- **Auto Pay.** Used in conjunction with the Set amount to booking total field. Set to **Yes** if the Payment Method should automatically click the payment button.

- **Provider Version.** Can be passed to the payment gateway if we need to use a certain version of the card payment provider.

- **Redirect.** If applicable, enter the URL to redirect the customer after the initial prepare payment. Typically 'progress.aspx' within the ticketing website**.**

- **Collect Account Data.** Select **Yes** if you would like card details to be collected.

- **Auto Expiry Days**. If applicable, enter the number of expiry days for submitted Auto payments.

- **Update Booking Status.** This field is related to the First Payment & Direct Debit Mandate functionality. If creating a Payment Method of Direct Debit this flag if set to **No** allows the booking to stay in Pending status (or whatever the status was) prior to this payment method. This allows the organisation to force collection of another type of payment after a direct debit mandate has been made. If the flag is set to **Yes** then the booking will progress through to Reserved in the normal manner.

Charges

- **Charge Amount.** Enter the amount that will automatically be added as a charge when this Payment Method is used. For example a card payment method may add a £1.00 charge to use.

- **Charge Percentage.** Enter the percentage of the shopping basket total that will be automatically added as a charge when this Payment Method is used.

Tab Payment

- **Tab Visibility Global.** Select **Yes** if you wish tabs to be available on all Terminals. Only required if tabs are enabled.

Finance Payment (If creating a Direct Debit type Payment Method all of the following fields should be completed)

- **Payment Schedule.** Use the Look Up to select the relevant Payment Schedule. If no payment schedule exists, click on New to create a new one. This is relevant and should be completed when setting up a Direct Debit.

- **Requires Mandate.** Select **Yes** if the payment requires a Mandate. Typically used for the setup of the Direct Debit payment method.

Card (If creating a Card type Payment Method all of the following fields should be completed. Some will also have to be completed when creating a Finance type Payment Method).

- **Card Provider.** Enter the name of the Card Provider accepted.

- **Gateway URL.** Enter the URL users are transferred to when making a payment through the payment gateway.

- **Payer Auth URL.** Enter the URL users are directed to when authorising payments through the payment gateway.

- **ByPass Card Provider.** Select **Yes** to bypass the payment gateway settings (used for testing).

- **Merchant Reference.** Enter your Merchant Reference as supplied by the payment gateway.

- **Account Id.** Enter your Account Number as supplied by the payment gateway.

- **Currency Culture.** Payment provider specific configuration.

- **Refund Password.** Enter the password required when refunds are processed.

- **Currency Code.** Enter the currency code.

- **Customer IP Address.** Payment provider specific configuration.

- **Mail Order.** Select **Yes** if the payment type is used solely for mail order bookings.

- **Merchant Id.** Enter your Merchant Id as supplied by payment gateway.

- **Passcode.** Enter your account Passcode as supplied by the payment gateway.

- **Organisation Id.** Enter your Organisation Id as provided by the payment gateway.

- **3-D Secure.** Select **Yes** if the payment gate utilises the 3-D Secure authentication.

- **Currency Exponent.** Payment provider specific configuration.

Chip & Pin (If creating a Chip and Pin type Payment Method all of the following fields should be completed).

- **Provider.** Enter the name of the chip and pin provider.

- **Account No.** Enter your organisation's Account Number as provided by the chip and pin provider.

- **Port.** Payment provider specific configuration.

- **Keep Alive Message.** Message sent periodically to prevent the chip and pin connection entering into idle mode.

- **Transaction Reference Prefix.** Payment provider specific configuration.

- **Payment Transaction Type Code.** Transaction code used for payments made via chip and pin.

- **Auth Code Required.** Select **Yes** if an authorisation code is required when submitting chip and pin payments.

- **Account Name.** Enter your organisation's Account Name as provided by the chip and pin provider.

- **Host.** Payment provider specific configuration.

- **Cardholder Present.** Indicates if the cardholder is present when using the payment method. For card payments it may be necessary to set up two payment methods: one for when the card holder is present, and one for when the card holder is absent.

- **Merchant ID.** Your organisation's merchant ID as provided by the chip and pin provider.

- **Chip Pin Connection Timeout.** Enter the timeout period for the chip and pin. Transactions will be aborted if a response from the server is not received within the timeout period.

- **Refund Transaction Type Code.** Transaction code used for refunds issued via chip and pin.

- **Auth Code ReadOnly.** Select **Yes** if the authorisation code is to be a read only field.

e) Once the details are correct, select **Save** on the ribbon.

LINKING THE PAYMENT METHOD TO THE CHANNEL

After creating the Payment Method, it will need to be linked to the appropriate Channels that it is going to be used on, and some Channels will require different Payment Methods compared with others. Please note that this section assumes that the Channels have already been created.

To link the Payment Method to the Channel, complete the following:

a) With the Payment Method form open, select the small arrow next to the name of the Payment Method in the navigation bar.
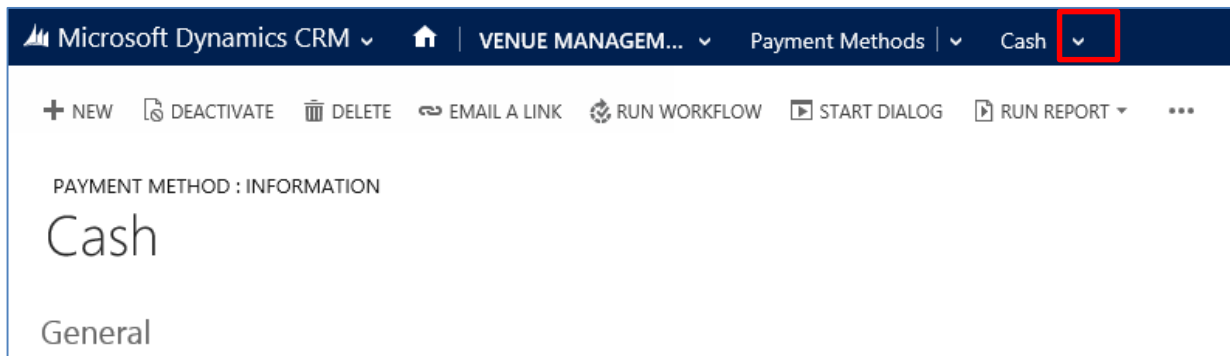
b) From the drop down, scroll across and select **Channels.**
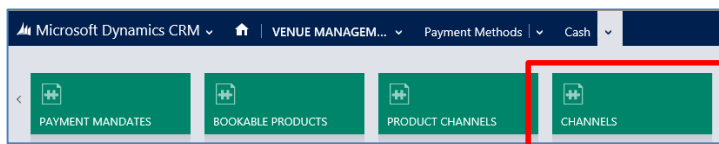
c) The Channel Associated View will be displayed, select the **Add Existing Channel** on the ribbon.
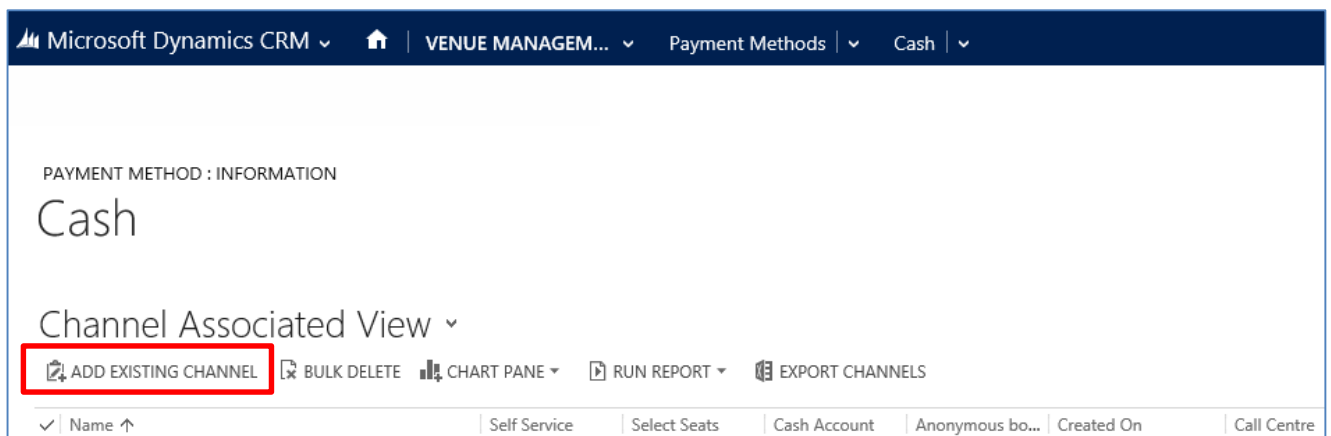
d) Use the search bar to find the relevant Channel or alternatively select the magnifying glass icon to view a list of Channels with the option to Look Up more records.

e) After finding the relevant Channel that the Payment Method will be used on, select it. The Channel will then be added to the Payment Method Channel Associated View.

f) Repeat the above steps for all of the Channels that need to be linked to the Payment Method. When completed select the Save icon in the bottom right hand corner of the screen.

PAYMENT METHOD EXAMPLES

CASH

Below are the mandatory fields that must be completed in order to create a Cash type Payment Method. It must be noted that other fields not listed below within the Payment Method form can be completed to offer additional functionality.

Payment Method Form Fields	
Name	Cash
Payment Type	Cash

CARD

Below are the fields that must be completed when creating a Card type Payment Method. It must be noted that other fields not listed below within the Payment Method form can be completed to offer additional functionality.

Payment Method Form Fields		Account Id	Enter the Account Id
Name	Card	Currency Culture	Enter the Currency Culture for example en-GB
Payment Type	Card	Refund Password	Enter a password that is required when refunds are to be processed
Redirect	Enter a 'progress.aspx' red		
Collect Account Data	Yes	Currency Code	Enter the Currency Code
		Customer IP Address	Enter the IP Address
Card Provider	Enter the Card Provider	Merchant Id	Enter the Merchant ID as supplied by the Payment Gateway
Gateway URL	Enter the Gateway URL		
Payer Auth URL	Enter the Payer Auth URL	Passcode	Enter your account Passcode
Bypass Card Provider	No	3-D Secure	Yes/No if 3D secure is used.
Merchant Reference	Enter the Merchant Reference	Currency Exponent	Enter the Currency exponent.

INVOICE

Below are the mandatory fields that must be completed in order to create an Invoice type Payment Method. It must be noted that other fields not listed below within the Payment Method form can be completed to offer additional functionality.

Payment Method Form Fields	
Name	Invoice
Payment Type	Invoice

DISCOUNT

Below are the mandatory fields that must be completed in order to create a Discount type Payment Method. This can be used so that a Booking Operator can select it at the checkout to apply a discount for the booking if necessary. The Booking Operators form in CRM must be set to **Allow Discounts** - **Yes**, for this functionality to work. The Booking Operator must also enter their pin to apply the discount. It must be noted that other fields not listed below within the Payment Method form can be completed to offer additional functionality.

Payment Method Form Fields	
Name	Discount
Payment Type	Discount

DIRECT DEBIT

Direct Debits are set up as a Finance type Payment Method as shown in the Creating a [Payment Method](#) section. However, a Direct Debit Payment Method must have a Payment Schedule linked to it, the Payment Schedule sets up when each payment for the Direct Debit is to be paid, for example this may be at the start or end of every month. However before creating the Payment Schedule and Payment Schedule Items, the Direct Debit [Payment Method](#) should be created as shown in the previous section.

PAYMENT SCHEDULE

Within the Finance type Payment Method form the Payment Schedule field must be completed with an appropriate schedule. The Payment Schedule will control when the Direct Debit payments are to be taken. Before a Payment Schedule can be added within the Finance type Payment Method form, the schedule must be created.

To create a Payment Schedule, complete the following:

a) Within CRM, select the **Microsoft Dynamics CRM** tab in the navigation bar before scrolling across and choosing **Venue Management** from the drop down.
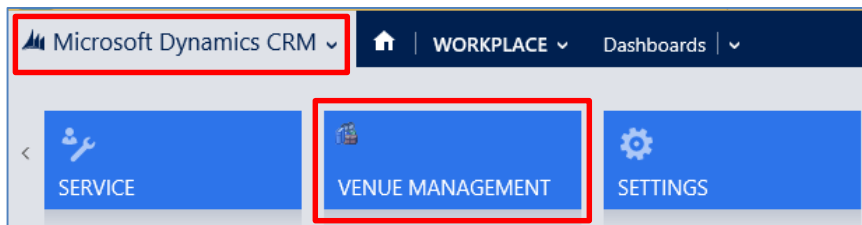
b) Next, select the **Venue Management** tab in the navigation bar and from the drop down choose **Payment Schedule.**
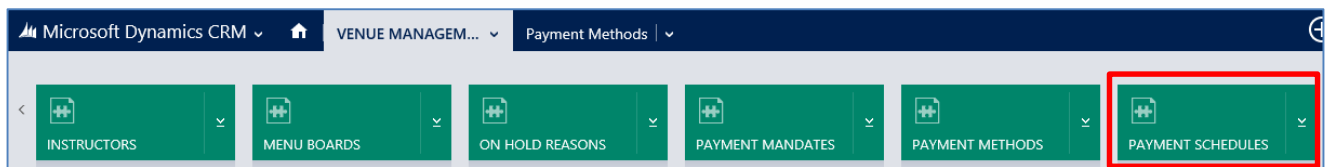
c) The Active Payment Schedules view will be displayed, select **New** on the ribbon.
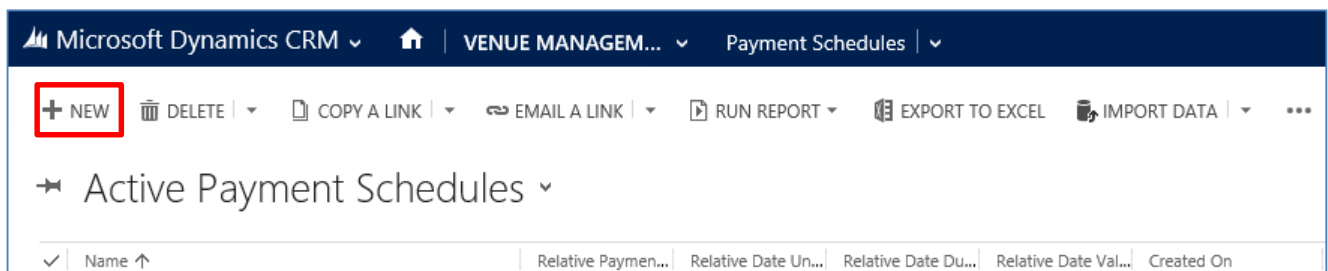
d) A new Payment Schedule form will be displayed, complete the following.

- **Name.** Enter the name of the Payment Schedule.

- **Relative Data Unit.** Only enter if you have selected **Yes** in the **Relative Payment Date** field.

- **Relative Data Valid Days.** Only enter if you have selected **Yes** in the **Relative Payment Date** field**.** Enter with the use of a comma separating the numbers, the days valid for payment to be taken. i.e. 5,20 if monthly payments are defined to be collected on the 5th or 20th of the month.

- **Description.** Enter a description of the Payment Schedule.

- **Relative Payment Date.** Select **Yes** if you would like your payment date to be Relative. Select **No** if you would like your payment dates to be Absolute.

- **Relative Date Duration.** Only enter if you have select **Yes** in the **Relative Payment Date** field. From the drop down list, select on what basis the payment will be taken. Choose from:

    - Week

    - Month

    - Year

e) Select **Save** on the ribbon, the Payment Schedule Items must now be added to the Payment Schedule.

PAYMENT SCHEDULE ITEMS

A Payment Schedule Item represents each of the payments that need to be made to make up the Direct Debit, each Payment Schedule Item is worth a certain percentage of the overall cost of the product purchased via Direct Debit. Multiple Payment Schedule Items will need to be created as each Payment Schedule Item represents one payment. Therefore if I was creating a Direct Debit that was paid across 12 months, 12 Payment Schedule Items should be created.

To add Payment Schedule Items, complete the following:

a) With the Payment Schedule still open, select the small arrow next to the name of the Payment Schedule in the navigation bar and from the drop down select **Payment Schedule Items**.
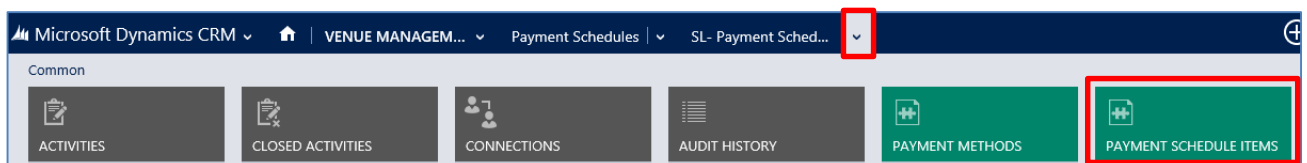
b) The Payment Schedule Item Associated View will be displayed, select **Add New Payment Schedule Items** on the ribbon.

c) A New Payment Schedule Item will be displayed. The following fields should be completed:

.

- **Name.** Enter the name of the payment, i.e. Payment 1.

- **Payment Date.** Enter the date that the payment is to be made, this is used when creating Absolute Payment Schedules. If a Relative Payment Schedule has been created, the date does not need to be entered.

- **Rounding Payment.** Select **Yes** if the payment is to be rounded to the nearest whole number when it is taken.

- **Payment Number.** Enter the number which this payment is, for example this may be the first payment that is to be taken as part of the Direct Debit, therefore enter 1.

- **Payment Percent of Total.** Enter the percentage of the overall value of the product that has been purchased via Direct Debit that this Payment Schedule Item is worth.

d) Select **Save and Close** on the ribbon. This process can then be repeated until the appropriate number of Payment Schedule items making up the overall cost of the product to be paid for have been created.

e) When all Payment Schedule Items have been created select the **Save** icon in the bottom right hand corner of the screen.

The table below gives an example of Payment Schedule Items based on an absolute Direct Debit that runs for 12 months. Therefore 12 Payment Schedule Items have been created and the Payment Percent of Total add up to 100% when added together.

Name	Payment Date	Rounding Payment	Payment Number	Payment Percent of Total
Payment 1	01/01/2015	No	1	20%
Payment 2	01/02/2015	No	2	15%
Payment 3	01/03/2015	No	3	10%
Payment 4	01/04/2015	No	4	10%
Payment 5	01/05/2015	No	5	10%
Payment 6	01/06/2015	No	6	10%
Payment 7	01/07/2015	No	7	5%
Payment 8	01/08/2015	No	8	5%
Payment 9	01/09/2015	No	9	5%
Payment 10	01/10/2015	No	10	5%
Payment 11	01/11/2015	No	11	3%
Payment 12	01/12/2015	No	12	2%

f) The Payment Schedule can now be added to the Finance type Payment Method form. This is done by opening up the Payment Method that represents Direct Debit before finding the Finance Payment section. Use the Look Up to select the Payment Schedule that has previously been created.

g) Select the **Save** icon in the bottom right hand corner of the form.

Note. For a product to be sold via Direct Debit, the Bookable Product form must have the **Payable By** field completed with the Direct Debit Payment Method as well as the **Direct Debit Mandate** field set to **Yes**.

VIEWING A DIRECT DEBIT BOOKING IN CRM

When a booking paid for by Direct Debit is viewed in CRM under the Booking Payments section, all of the Scheduled payments will be listed. As each payment is taken, the payment status will update from **Scheduled** to **Approved.**

FIRST PAYMENT & DIRECT DEBIT MANDATE – CRM SET UP

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

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

 It is assumed that the following have already been created:

- An active **Bookable Product** (such as a Membership) with all the associated features within it such as the **Channels**, **Variants and Pricing** as well as being connected to a valid **Sales Plan** and **Channel Price List**. This Bookable Product should also have the **Payable By** field completed with a **Direct Debit Payment Method.**

- The **Direct Debit Payment Method** should already have been created with a valid **Payment Schedule** linked to it. The Payment Schedule will control when the Direct Debit payment begins and how often it is taken.

To set up the Direct Debit Recurring and First Payment functionality, complete the following:

Step 1: Set the Direct Debit Mandate to 'Required' on the Bookable Product form

For products that are to be sold through the recurring Direct Debit and first payment method, the field **Direct Debit Mandate Required** must be flagged to **Yes** in the Bookable Product form that represents the product that you would like this functionality to relate to.

To do this, complete the following:

a) Select or hover over the **Microsoft Dynamics CRM** tab before scrolling across the drop down list of the navigation bar and selecting **Product Management**.
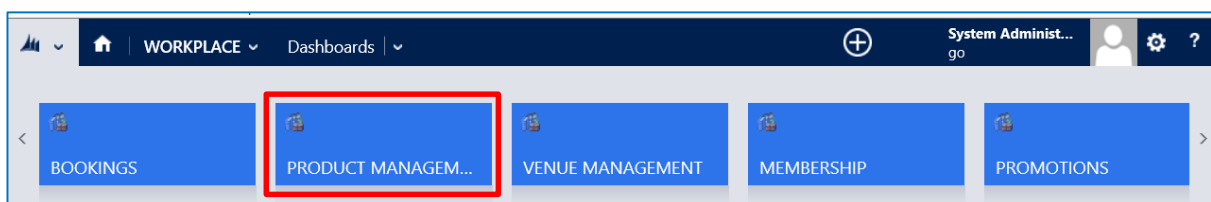
b) Next, in the Product Management area of CRM, select the **Product Management** tab before selecting **Bookable Products** from the drop down.
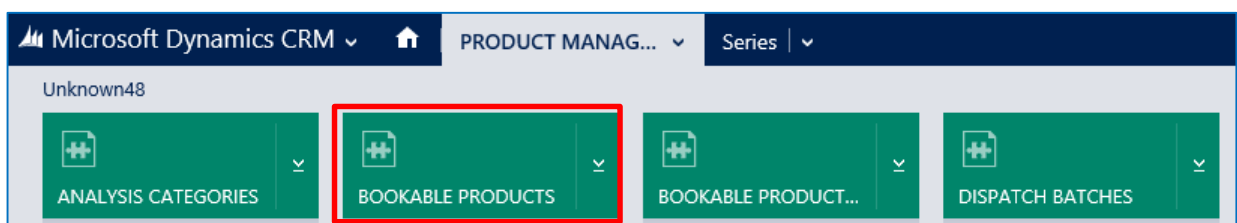
c) A list of the currently active Bookable Products will be displayed. Select the Bookable Product that this functionality is to be added to.

d) In the General Section of the Bookable Product form complete the following:

Direct Debit Mandat: Yes

- **Direct Debit Mandate Required.** Select **Yes**. This flag will indicate that a Direct Debit Mandate is required to purchase the selected Bookable Product. This will force the POS or Web to display the Direct Debit Mandate screen rather than the usual select Payment Method screen.

e) Select the **Save** icon in the bottom right hand corner of the screen.

Step 2: Set the Payment Method form

The Payment Method form must be set to enable another payment method that is not Direct Debit to be collected after a Direct Debit Mandate has been made. This will allow the payment to be taken before the Direct Debit begins. To do this, complete the following:

a) Within CRM, select the **Microsoft Dynamics CRM** tab in the navigation bar before scrolling across and choosing **Venue Management** from the drop down.
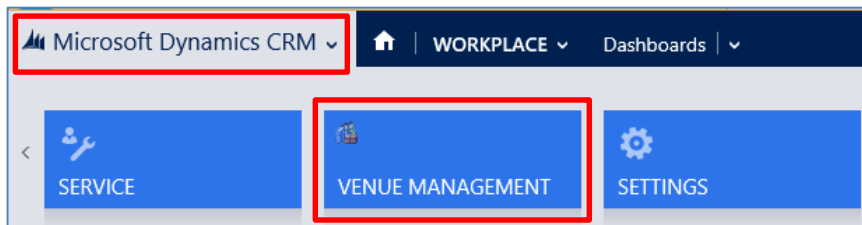
b) Next select the **Venue Management** tab in the navigation bar and from the drop down choose **Payment Methods.**
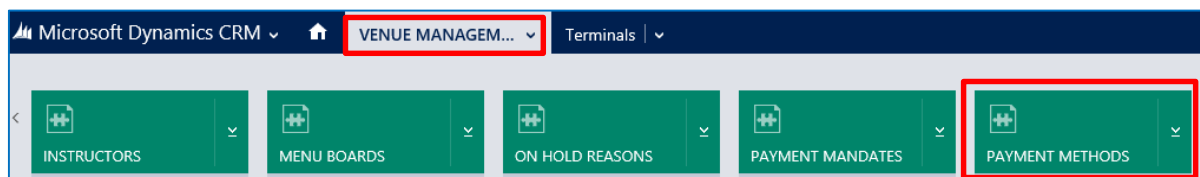
c) The Active Payment Methods view will be displayed, select the Direct Debit Payment Method.

d) With the Payment Method form open, ensure that the following flag has been completed in the General section:

Update Booking Statu   No

- **Update Booking Status.** Set the flag to **No**, this will allow the booking to remain in a Pending Status (Or whatever the status was prior to this Payment Method.) This will force another Payment Method type to be made, after a Direct Debit Mandate has been made. If the flag is set to **Yes** then the booking will progress through to Reserved, in the normal manner and an additional Payment Method cannot be used.

e) Select the **Save** icon in the bottom right hand corner of the screen.

Step 3: Set the Company Details Form

The Company Details form must be set to allow an additional payment to me made against a booking in a reserved state and has pending scheduled payments such as Direct Debit.

To enable this, complete the following:

a) Within CRM, select the **Microsoft Dynamics CRM** tab in the navigation bar before scrolling across and choosing **Venue Management** from the drop down.
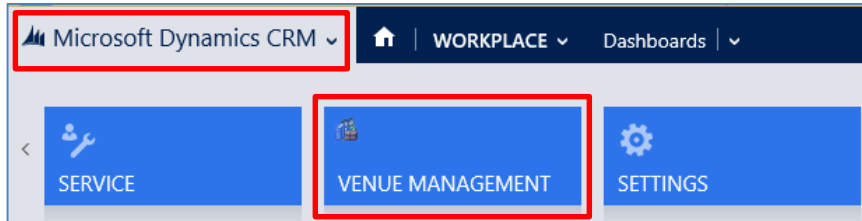
b) Next select the **Venue Management** tab in the navigation bar and from the drop down choose **Company Details.**
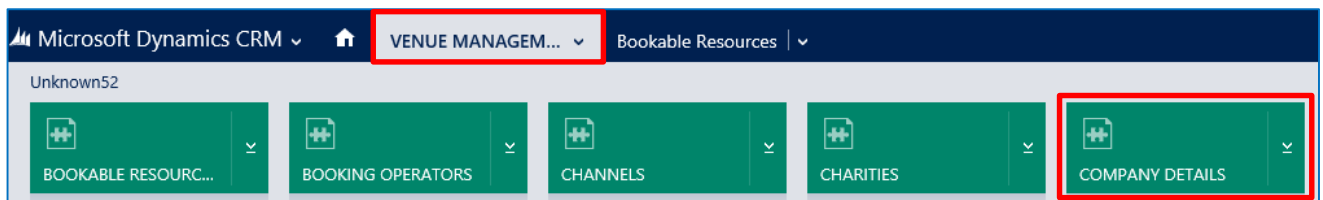
c) The Active Company Details page will be shown, open the Company Details form.

d) Under the Options section of the form, complete the following flag:

e) **Allow Additional Payments After Finance.** Set to **Yes,** this will allow additional payments to be made against a booking that is in the reserved state and has pending scheduled payments such as Direct Debit.

f) Select the **Save** icon in the bottom right hand corner of the screen.

5. PRINTERS

CREATING A PRINTER RECORD

To create a Printer Record, complete the following:

a) Within CRM select the **Microsoft Dynamics CRM** tab on the navigation bar before scrolling across and selecting **Settings** from the drop down.
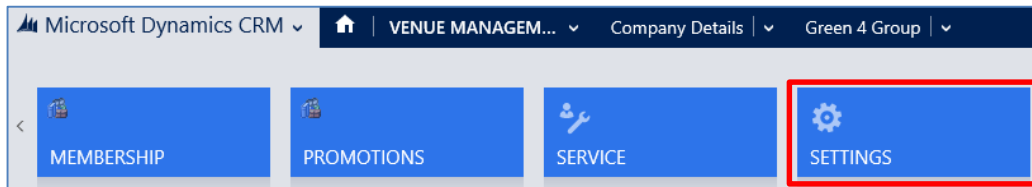
b) Select the Settings tab on the navigation bar and from the drop, choose **Printers**.
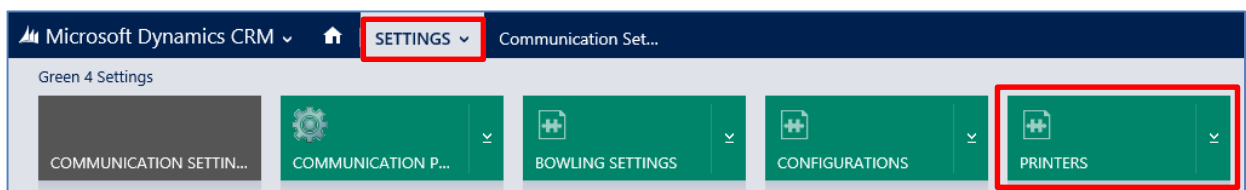
c) The Active Printers view will be displayed, select **New** on the ribbon.
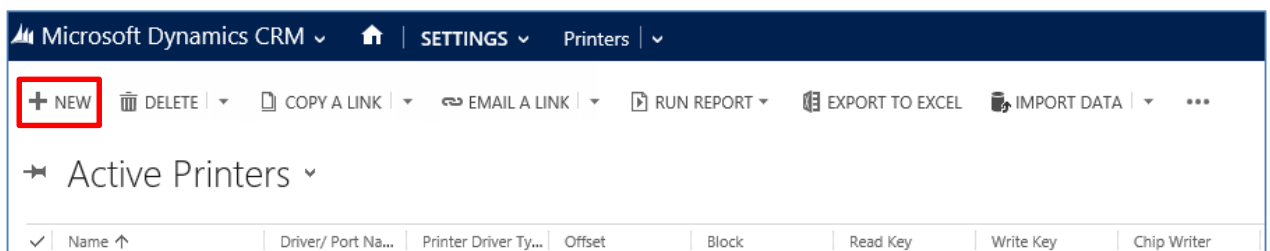
d) A New Printer form will be displayed, complete the following details.

Note. It may not be necessary to complete all the fields as differing Green 4 customers require specific fields to be completed for their required functionality to be enabled. The following gives a broad definition and overview of every field in the Printers form.

General

- **Name.** Enter the name of the Printer. The name may be used by other users to identify the Printer, and therefore should reflect the Printer's name and/or location, e.g. Ticket Printer in Shop.

- **Printer Driver Type.** Use the Look Up Records dialog to select the Printer Driver Type before clicking **OK** to return to the Printers form. The option selected (**Serial** or **Window**s) will determine the information that needs to be entered into the Driver / Port Name field.

- **Open Till Command.** Enter the open till command.

- **Send PostFix Byte.** Printer and contactless card configuration settings. When printing to a parallel port, should a PostFix Byte be sent, select **Yes** if it should and **No** if it should not.

- **Strip BOM**. Printer and contactless card configuration settings. When converting to byte array should the BOM be removed, select **Yes** if it should and **No** if it should not.

- **Batch**. Enter the batch sizes that the data is sent to the printer in.

- **Driver / Port Name.** If the printer is a serial printer, enter the port name. If the printer is a Windows printer enter the Windows driver name.

- **PostFix Byte.** Printer and contactless card configuration settings. This is the byte that is to be sent to the printer at the end of the job, it is used when printing to a Parallel Port.

- **Interval.** Enter the number of seconds that the printer waits before sending batches of data

- **Print Media.** Use the Look Up Records dialog to select the unique identifier for the Print Media before clicking **Ok** to return to the printers form. If none are displayed create a new one by selecting New and completing the relevant fields.

Card Info

- **Block.** Printer and contactless card configuration settings.

- **Offset.** Printer and contactless card configuration settings.

- **Read Key (Key A).** Printer and contactless card configuration settings.

- **Write Key (Key B).** Printer and contactless card configuration settings.

- **Chip Writer.** Printer and contactless card configuration settings.

- **Access Bits.** Printer and contactless card configuration settings.

- **Layout.** Printer and contactless card configuration settings.

- **Length.** Printer and contactless card configuration settings.

- **Trailer Block.** Printer and contactless card configuration settings.

- **Read From Chip.** Printer and contactless card configuration settings.

- **Write to Chip.** Printer and contactless card configuration settings.

e) When the settings are complete click **Save and Close** on the ribbon.

PRINT TRANSFORMS

The Print Transform entity is used to define the templates used when printing tickets, receipts or till reports. To create a Print Transform record complete the following:
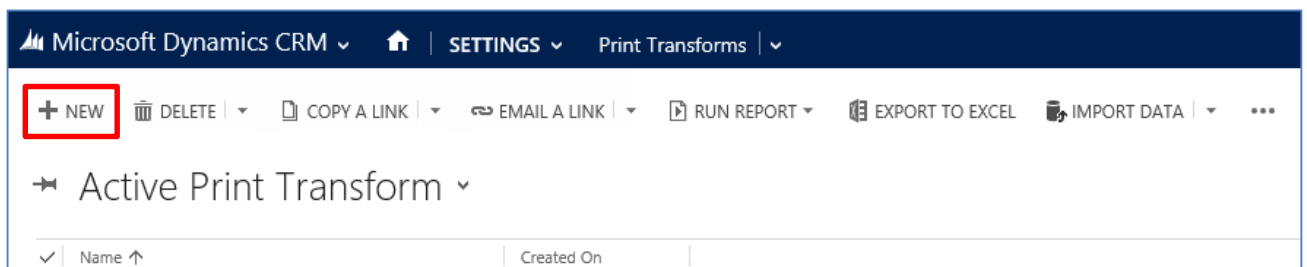
a) Within CRM select the **Microsoft Dynamics CRM** tab on the navigation bar before scrolling across and selecting **Settings** from the drop down.
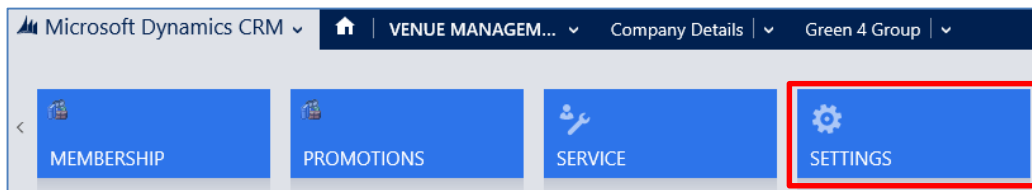
b) Select the Settings tab on the navigation bar and from the drop scroll across and choose Print Transforms.
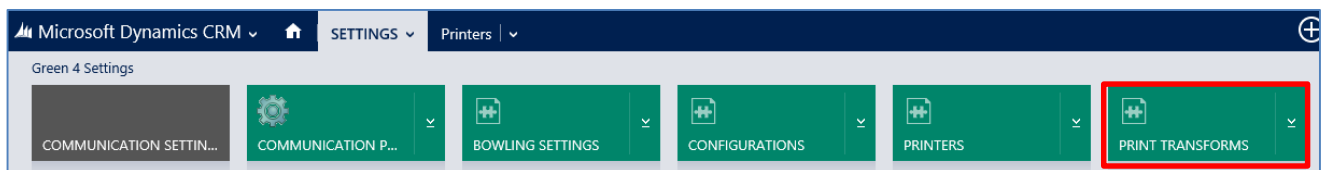
c) A list of any Active Print Transforms will be displayed, select **New** in the ribbon.

d) A New Print Transform form will be displayed, complete the following details:

General

- **Name.** Enter a name for the Transform. The name will be used to identify the purpose of the transform and should therefore reflect the purpose, for example Ticket with Address.

- **Printer Job Type.** Use the Look Up Records dialog to find the appropriate printer job type. If a suitable job type does not exist, select New on the dialog and complete the requested details. Select Save and Close on the ribbon to return to the Look Up Records dialog.

- **Single Print Job.** Set to **Yes** if single print job required, the print job will be sent 1 page at a time.

- **Printer Driver Type.** Use the Look Up Records dialog to select the type of printer the transform can be used with.

- **Use XSLT+.** This field is only used by the new print rendering solution.

XSLT

- **Transform.** Enter the transform details using XML. The transform XML defines the layout of the printout and additionally details the information that will be pulled from the Green 4 Ticketing database and used for printing, for example customer name and product name. The transform XML will determine the information and layout included in the print out.

e) When the details are complete click **Save and Close** in the ribbon.

6. BOOKING OPERATORS, GROUPS AND THIRD PARTY LOGINS

Each Go Ticketing user must be added to the system as a Booking Operator. Booking Operators differ from CRM users as they will be unable to log directly into CRM. Booking Operators are those who control the POS and can also be added to allow Third Party Operators access to a booking site. A number of Booking Operators can be held under one Booking Operator Group. Booking Operator groups are used in Third Party Logins and a Group could be a hotel or local tourism agency that holds Booking Operators within it.

BOOKING OPERATORS

Booking Operators are the individual users of the POS and can also be added to enable access to third party sites. Each Booking Operator will have their own Username and password which will be their login details.

To create a new Booking Operator complete the following:

a) Within CRM, select the **Microsoft Dynamics CRM** tab in the navigation bar before scrolling across and choosing **Venue Management** from the drop down.
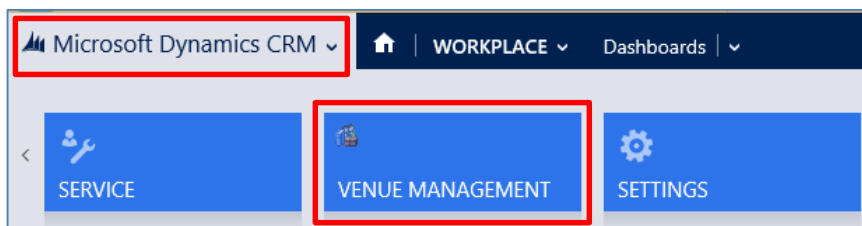
b) Next select the **Venue Management** tab in the navigation bar and from the drop down choose **Booking Operators.**
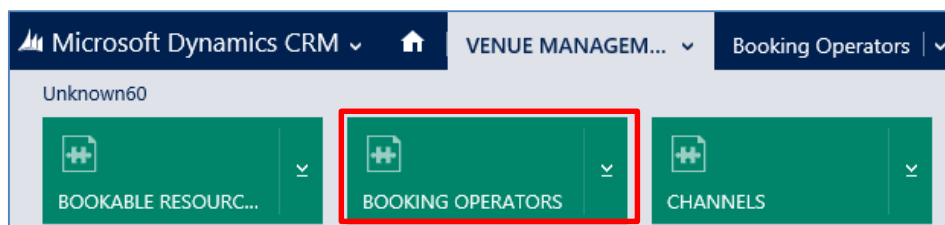
c) The Active Booking Operators view will be displayed, select **New** on the ribbon.
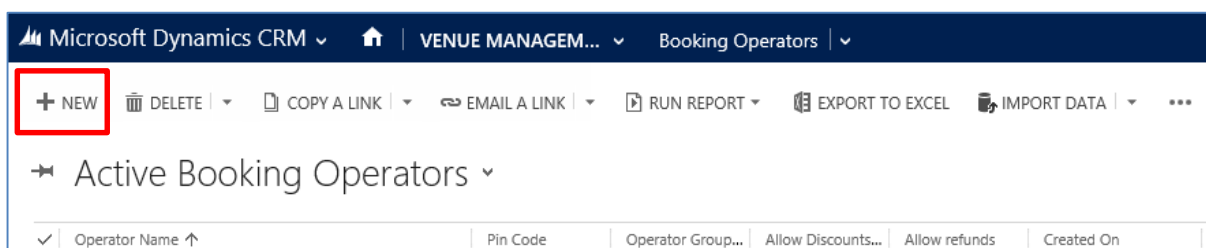
d) A New Booking Operator form will be displayed, complete the following:

- **Operator Name.** Enter the Operator's name.

- **Pin Code.** Enter a pin for the operator. The operator will use the pin to log into the Ticketing application. The pin provided must be unique to all other Pin Codes.

- **Dallas Key Code.** If using Dallas Key fobs to log into the POS, enter the code that is read from the Dallas Key that has been assigned to the operator.

- **Email.** Enter the operator's email address, this will be used as the username for the operator to log into the third party site with.

- **Operator Group.** Select the Operator Group to which the operator belongs. Operator Groups are used to group users into logical subsets. For a third party Booking Operator this would represent the third party site such as a Local Ticketing Agency or Hotel.

> ⚠️ **Note.** If when creating your Company Details the Use Operator group's field was enabled, then the selected Operator Group here will only be able to log into the set Channel that is linked to the selected Operator Group, whereas by default all operators can access all channels.

- **Allow Discounts.** Select **Yes** if the operator is allowed to apply discounts to a purchase, this is used in conjunction with the Discount Payment Method.

- **Zonal Export.** Select **Yes** if the operator is allowed to carry out Zonal exports.

- **Cash Handling Admin.** If using the Cash Handling functionality select **Yes** for the Booking Operator to be able to use their pin as a Witness Pin during the Cash Handling process in the POS.

- **Allow Refunds.** Select **Yes** if the operator is allowed to make refunds to the customer.

- **External ID.** Use the **Find** button to select the user's external Zonal ID. This external ID will link the user's Green 4 Ticketing login details with their Zonal account.

e) When the settings are complete click **Save and Close** on the ribbon. Repeat the above Process for each Booking Operator that needs to be added to the system.

THIRD PARTY LOGINS AND OPERATOR GROUPS

A Third Party sells tickets or passes on behalf of a main attraction, for example a hotel or tourism agency. Third Parties will usually have their own website in which their Booking Operators will be able to log into, to sell products.

The Booking Operators who represent the people selling the tickets from the third party site must be set up. Within the Booking Operator Records section the field Operator Group must be completed. Attached to the Operator Group must be the Channel that represents the third party seller. The instructions below assumes that a Third Party Channel has already been created.

This can be done by completing the following:

a) With the Booking Operator open, go to the **Operator Group** field.

b) Select the Look Up icon and select **New.**

c) A new Operator Group will be displayed, enter the **Name** of the Operator Group, for example Local Ticketing Agency or Hotel.

d) Select **Save** on the ribbon.

e) Next the **Channel** that represents the Third Party must be added to the Operator Group.

f) In the Navigation bar of the Operator Group form select the small arrow next to the name of the Operator Group and from the drop down, choose Channels.
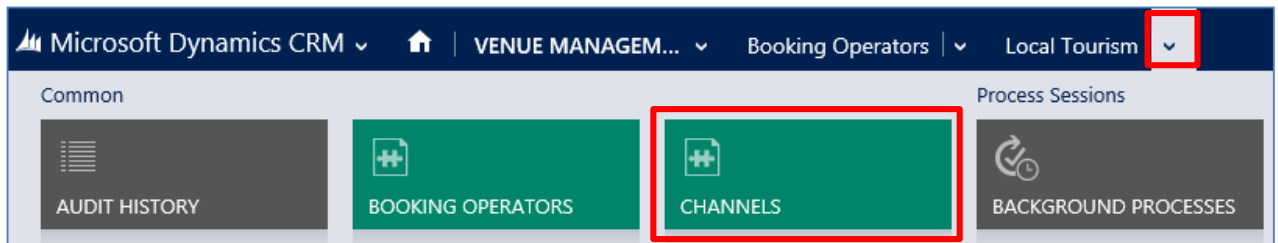
g) A Channel Associated View will be displayed. In the ribbon choose **Add Existing Channel.**
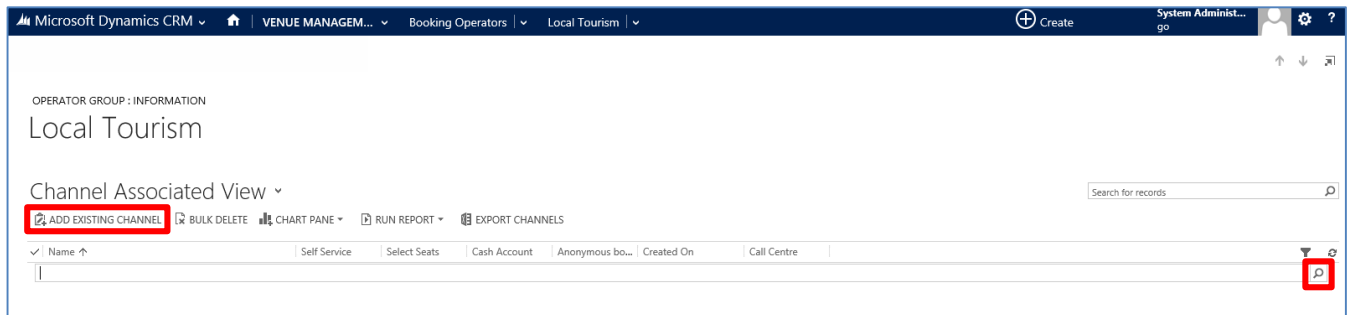
h) Use the Look Up icon to search for the appropriate Third Party Channel. Add the Channel by selecting it.
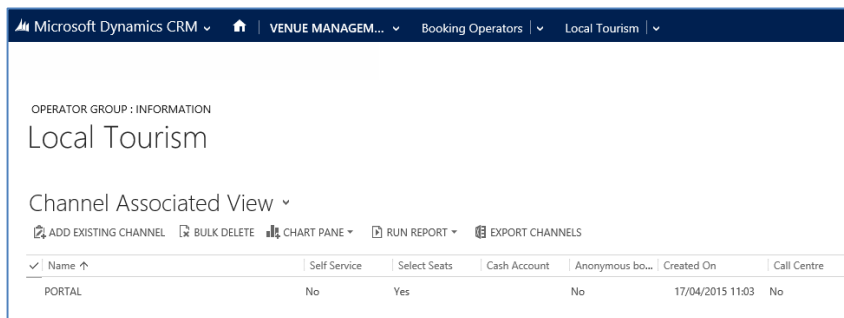
i) The Third Party Channel will now be connected to the Operator Group. All Booking Operators who are linked to this Operator Group will be able to log into the Third Party site using their Booking Operator email and PIN Code. The Operator Group field within each Booking Operator will need to be completed.

7. THE ACCESS GATE

This functionality allows access to be controlled at the POS.

It allows the POS to be used as an access point, allowing entry via a till point with the till operator scanning or entering a ticket or membership number.

Once a number has been entered or scanned into the system, access validation will subsequently take place, showing if entry is allowed or not, depending on the type of pass or membership.

For example, a pass may only allow access to the venue for a specific number of times, if the maximum uses of the pass has been exceeded and access to the venue is attempted, the POS will highlight this and access will be denied.

These instructions assume that the **Terminals** the Access Gate is to be set up on have already been created.

STEP 1 SETTING UP THE COMPANY DETAILS

Settings within the Company Details form control how long the Access Gates Validation or Fail period last for, as well as the Anti-pass back period. To do this, complete the following:

a) Within CRM, select the **Microsoft Dynamics CRM** tab in the navigation bar before scrolling across and choosing **Venue Management** from the drop down.
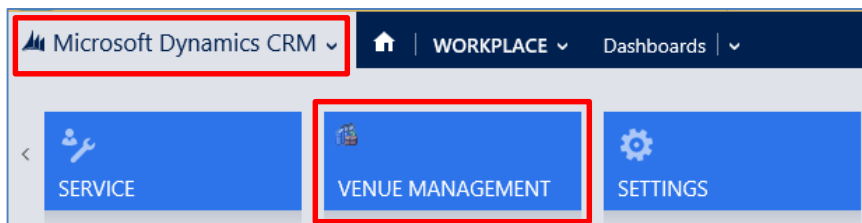
b) Next select the **Venue Management** tab in the navigation bar and from the drop down choose **Company Details.**
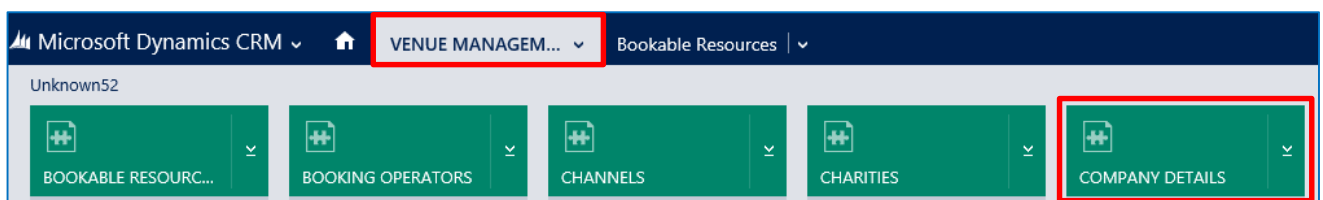
c) The Active Company Details page will be shown, open the Company Details form.

d) Scroll down to the **Access Point** area of the Company Details form and complete the following:

- **Access validation success period.** Enter the number of seconds that the Access Gate will show that validation has been a success.

- **Access validation failed period.** Enter the number of seconds that the Access Gate will show that validation has failed.

- **Anti-pass back period (minutes).** Enter the Anti-pass back period in minutes.

e) Select the **Save** icon in the bottom right hand corner of the screen.

STEP 2. SETTING UP THE TERMINAL

The Access Point settings within the Terminal form must be completed in order for the Access Gate to be fully functional. To do this, complete the following:

a) Within CRM, select the **Microsoft Dynamics CRM** tab in the navigation bar before scrolling across and choosing **Venue Management** from the drop down.
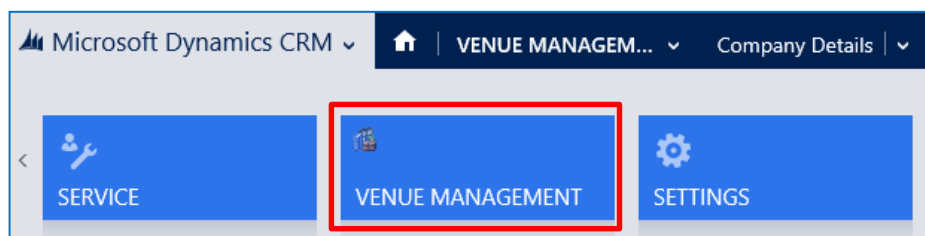
b) Next select the **Venue Management** tab in the navigation bar and from the drop down choose **Terminals.**
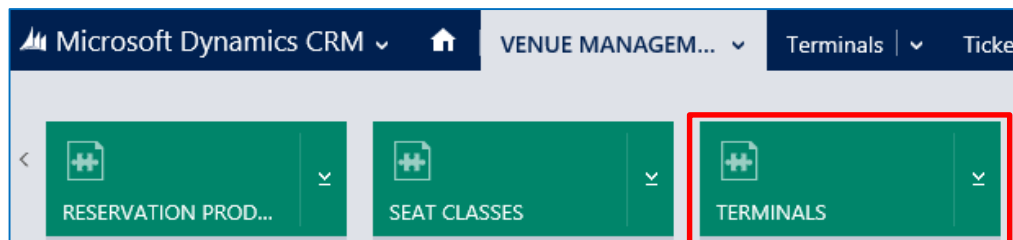
c) A list of Active Terminals will be displayed. Open up the Terminal that the access gate is required to be set up on, and if there are multiple Terminals which require the access gate, the following steps will need to be repeated for each of these Terminals.

d) The Terminal form will be displayed. In the form find the **Access Point** section as displayed below. Complete the following details:

- **Display Access Gate Tab.** Select **Yes** for the Access Gate tab to be displayed on the POS. If **No** is selected the Access Gate will not be displayed on the POS.

- **Gate Service Location.** Enter the URL for the Gate Service Location

- **Gate Reader Details.** Used for the gate reader details to allow details to be entered with cards, for example;

;nPort_Dev1=SMR,COM2

- **Access Point.** Use the Look up to select the access point that is relevant for this terminal. The Access Point selected must have attached Attendance Zones. If an Access Point with an attached Attendance Zone has not been created, complete the instructions in Step 3.

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

e) Select the **Save** icon in the bottom right of the screen.

STEP 3. CREATING THE ACCESS POINT AND ATTENDANCE ZONES

An Access Point must be created and added to the Terminal, the Access Point must also have an Attendance Zone attached to it. The Access Point represents the access to a particular Venue, so therefore one Access Point can be created to represent an entire site that may have multiple entrances.

The Attendance Zones are places within the Venue that is possible to restrict customers entering if they have not bought the appropriate product. For example a Venue may have numerous Attendance Zones, there may be one for the main site and others for different sites within the main venue such as an ice skating rink. It is possible to link attendance zones with a product and setting up attendance zones and product zones also restricts people that have bought one product from using the product to gain access to other areas of a site. For more information on how to set up Product Zones in CRM see Step 4 Product Zones.

To create an Access Point and Attendance Zones, complete the following instructions.

a) Choose the **Look Up icon** next to the **Access Point** field in the Terminal form and select **New**.

b) A New Access Point form will be displayed. Complete the following:


- **Name.** Enter a Name for the Access Point.
- **Gate.** Enter the gate number that this Access Point relates to. This must be completed with the use of numeric characters.

> **Note:** All other fields that are not displayed above do not need to be completed.

c) Upon completing these details, select **Save** in the ribbon.

d) Next, select the small arrow next to the name of the Access Point in the navigation bar. From the drop down, choose **Zones**.
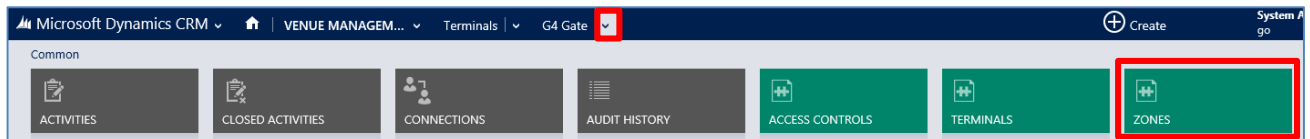
e) The Zone Associated View will be displayed, select **Add Existing Attendance Zone** in the ribbon. The Attendance Zones are places within the Venue where it is possible to restrict customers entering if they have not brought the correct product for it.
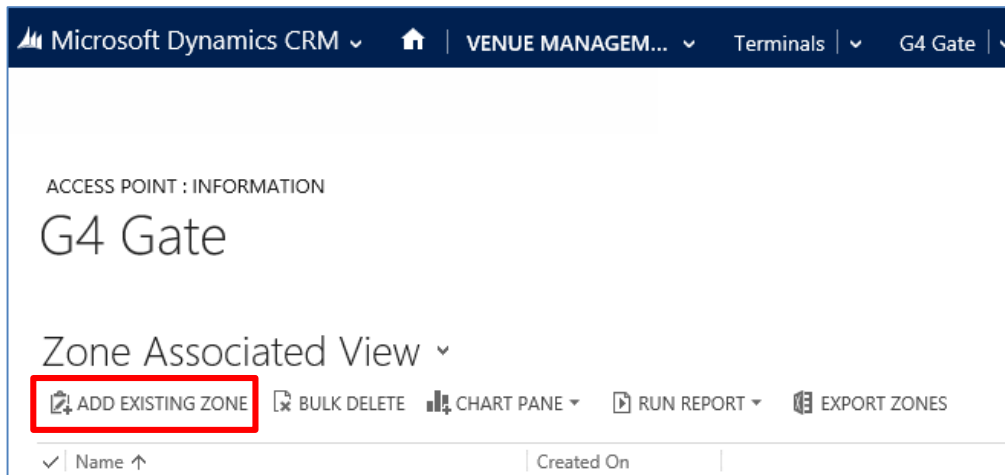
f) A drop down will appear, select the magnifying glass icon before choosing **New.**

g) A new Attendance Zone form will be displayed. Complete the following:

- **Name.** Enter the name of the Attendance Zone. For example Main Site or Ice Skating Rink etc.

- **Description.** Enter a description of the Attendance Zone.

- **Zone Number.** Enter the number of the zone e.g. 1.
- **Grace Minutes.** If applicable enter a number of minutes that entrance to the site can be gained before the session/pass/ticket start time begins. For example if you have an Ice Skating session booked for 15:00 and a Grace Minutes of 15 is entered, this will mean the customer could gain access to the site 15 minutes before it begins at 14:45.

Note: If Grace Minutes is being used in conjunction with a Fixture that has the Access From Offset on the fixture form completed, the minutes entered here will be added together with the number of Grace Minutes that have been entered.

h) Select **Save & Close** in the ribbon.

i) The Attendance Zone will now have been added to the Access Point. Select the **Save** icon in the bottom right hand corner of the screen.

j) Return to the Terminal form and add the Access Point that has been created to the Access Point field before selecting **Save**.
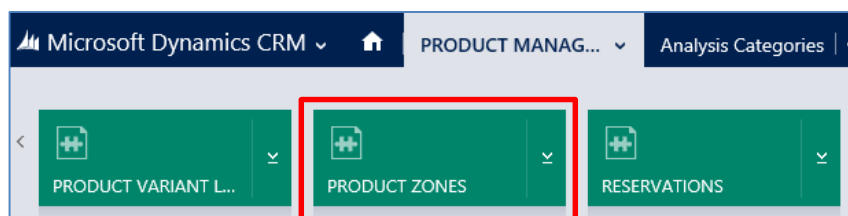
STEP 4. PRODUCT ZONES

It is essential for the Access Gate to work that Attendance Zones have been linked to the product, which is achieved by creating Product Zones. By setting up Product Zones this restricts people that have bought one product from using the product to gain access to other areas of a site. A Product Zone must be created for each Attendance Zone-Bookable Product combination, for access to be gained via the access gate. To do this complete the following instructions:
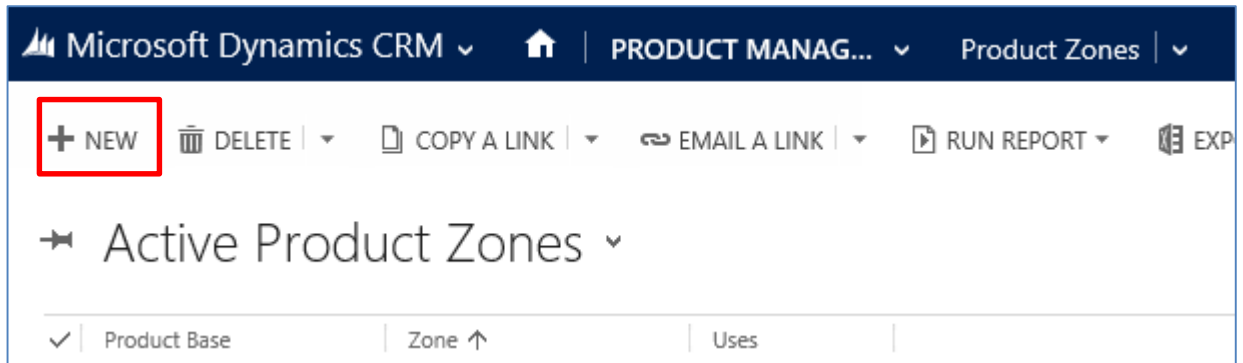
a) Within CRM 2015, select or hover over the **Microsoft Dynamics CRM** tab and from the drop down choose, **Product Management.**
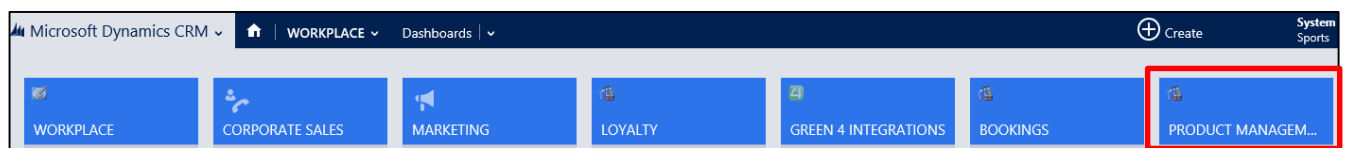
b) Select **Product Management** in the navigation bar and from the drop down scroll across before choosing Product Zones

c) The Active Product Zones view will be displayed, select New on the ribbon.

d) A new Product Zone form will be displayed. Complete the following details:

- **Name.** Enter the name of the Product Zone.

- **Zone.** Use the Look Up to select the Admission Zone that the selected Bookable Product will allow access into.

- **Product Base.** Use the Look Up to select the Product that when purchased will allow entry into the selected Zone.

  For example I may have a Zone of Main Site and a Bookable Product of Open Day Pass. This will mean that the Open Day Pass can be used to enter the main site.

  Alternatively I may have a Zone of Ice Skating Rink and a Bookable Product of Ice Skating Ticket, this would mean entry is allowed to the Ice Skating Rink but no other area of the venue site.

e) Select **Save & Close** in the ribbon. Repeat this process for each Product Zone that is to be set up.

8. OFFLINE WORKING

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

Note: Before setting up offline working for your organisation, it is necessary to install SQL Server Express on all terminals enabled for offline working.
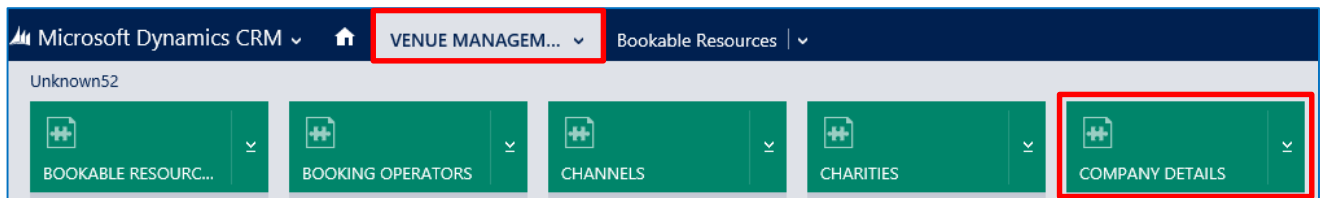
SET THE COMPANY DETAILS TO ALLOW OFFLINE WORKING

A field within the Company Details form must firstly be set to allow Offline Working

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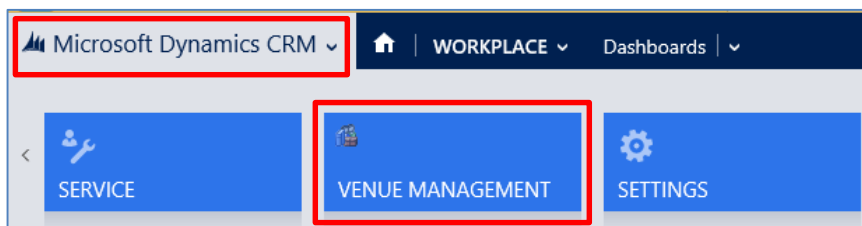
b) Next select the **Venue Management** tab in the navigation bar and from the drop down choose **Company Details.**

c) The Active Company Details page will be shown, open the Company Details form.

d) Within the Company Details form, ensure the **Allow Offline Mode** option is set to **Yes**.

Allow Offline Mode	Yes

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

SET UP OFF LINE TERMINALS

Before a Terminal can be used offline, it must have SQL Server Express installed. To prepare a terminal for offline working:

a) Within CRM, select the **Microsoft Dynamics CRM** tab in the navigation bar before scrolling across and choosing **Venue Management** from the drop down.
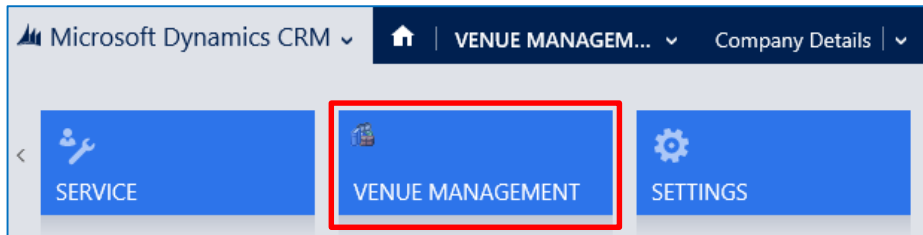
b) Next select the **Venue Management** tab in the navigation bar and from the drop down choose **Terminals.**
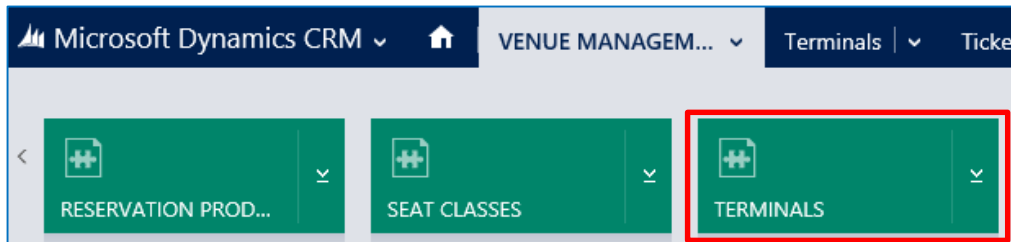
c) A list of Active Terminals will be displayed, open the relevant Terminal that is to be set up to work Offline.

d) Under the Offline Mode Settings section, complete the following details:

- **Last Synced.** The date the terminal was last synchronised will be displayed.

- **Offline Purchase Window (hours).** Enter the offline purchase window.

- **Offline Till Id.** Enter the till ID. Each offline terminal must have a unique id between (1 and 255)

- **Sync Interval (minutes).** Enter the synch interval (in minutes). The sync interval will determine how often the terminal will be synchronised with the local database.

- **Archive Days.** Enter the number of days archived.

- **Days to Download.** Enter the number of day's data to be downloaded to the offline database.

e) Select the Save icon in the bottom right hand corner of the screen. Repeat the above process for each Terminal that is to be used offline.
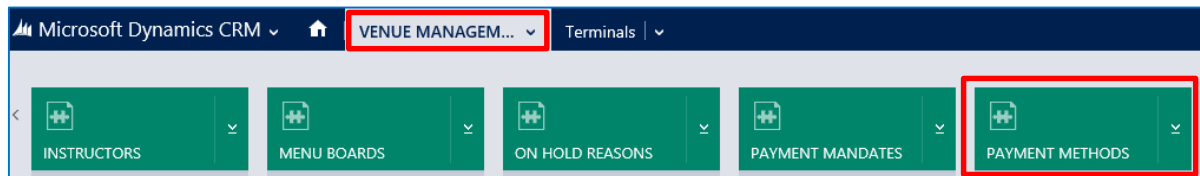
SET UP OFF LINE PAYMENT METHODS

Before offline working can be used, you must define which Payment Methods are to be made available offline:

To create a Payment Method, complete the following:

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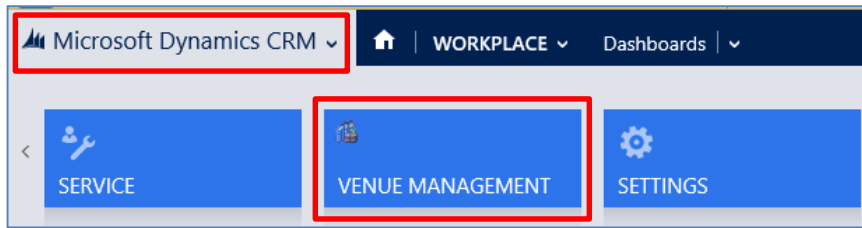
b) Next select the **Venue Management** tab in the navigation bar and from the drop down choose **Payment Methods**.

c) The Active Payment Methods view will be displayed. Select the Payment Method that will be available to use Offline, for example Cash.

d) Within the Payment Method form, select **Yes** alongside the **Available Offline** field.
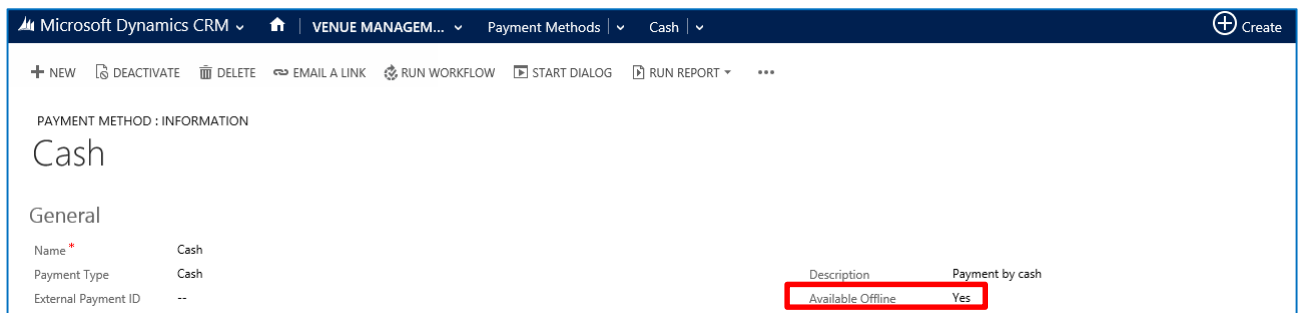
e) Select the Save icon in the bottom right hand corner of the screen. Repeat the above process for each Payment Method that is to be available offline.


⚠️ **Note:** Payment methods requiring an internet connection should not be set to be available offline.
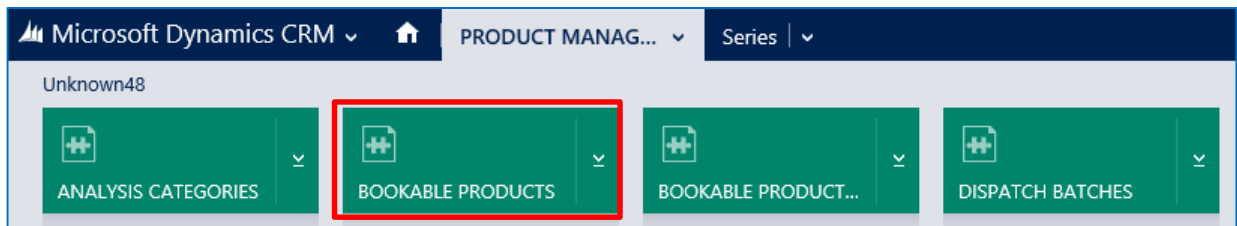

SET UP OFF LINE BOOKABLE PRODUCTS

Only products that have been defined as available for offline bookings will be available to operators when the internet connection to the POS till is lost. To define a product as available offline:

a) Select or hover over the **Microsoft Dynamics CRM** tab before scrolling across the drop down list of the navigation bar and selecting **Product Management**.
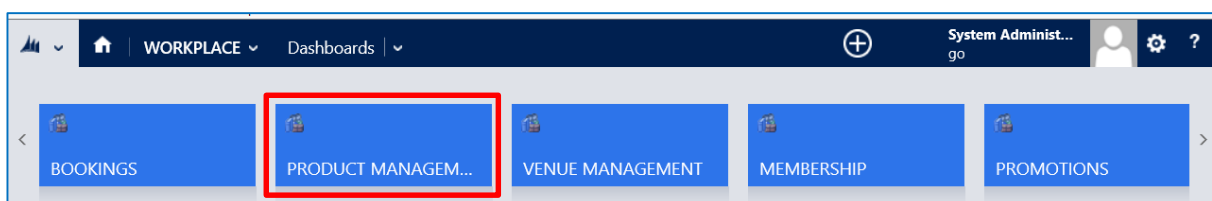
b) Next, in the Product Management area of CRM, select the **Product Management** tab before selecting **Bookable Products** from the drop down.

c) A list of the currently active Bookable Products will be displayed. Select the Bookable Product that is to be made available offline.

d) Within the Bookable Product form, select **Yes** alongside the **Available Offline** option.

e) Select the **Save** icon in the bottom right hand corner of the screen, repeat the above process for each Bookable Product that is to be made available offline.

Note: Bookable Products that require or request a beneficiary will not be available for offline bookings. Seated fixture products cannot be sold in offline mode as there is no method of controlling capacity.

End of Document