CRM DRIVEN SOLUTIONS FOR SPORT & LEISURE

GREEN 4 TICKETING

RESERVATIONS USER GUIDE V3.7

CONTENTS

ABOUT THIS DOCUMENT

This document has been prepared as a User Guide for Reservations.

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DOCUMENT CONTROL

Version	Date	Change	Initials
V1.00	02/09/2014	This is a new document	CP
V1.2	12/09/2014	Updates JW	JW
V1.3	15/09/2014	Updates CP	CP
V1.4	30/09/2014	Updates JW	JW
V1.5	17/10/2014	Updates JW	CP
V1.6	25/06/2015	Updated with Add Discount Percentage & Expiry Time for a reservation	JW

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RESERVATIONS

1. INTRODUCTION

The reservations functionality in Green 4 Ticketing enables you to reserve tickets for a future event for a customer that already holds a ticket. The reservation can be set up with an expiry date and contains:

- **Source Reservation Product (Series):** the existing ticket

- **Target Reservation Product:** the new ticket that is being reserved for the customer

Reservation

Source Reservation → Target Reservation

For example, a reservation can be set up for an existing Season Ticket holder to buy tickets for a cup match. The reservation holds a Cup Match ticket for the Season Ticket holders for the specified period of time and will be released for sale to other purchasers when the expiry date has passed.

A reservation is required for every bookable product that is sold, for example all Season Ticket holder products. As a result of this you will end up with a large list of reservations as is shown in the example below.

To set up a reservation for the example above carry out the following:

Note: Before starting the following process ensure the fixture or season ticket on offer has been created within CRM. However, it is imperative that the product is not offered for general sale until after reservations have closed, as it could result in seating conflicts.

1.1. SET UP THE RESERVATION PAYMENT TYPE

a) In the CRM **Navigation Panel**, select **Venue Management** followed by **Payment Methods**.

b) The Payment Methods view will be displayed:
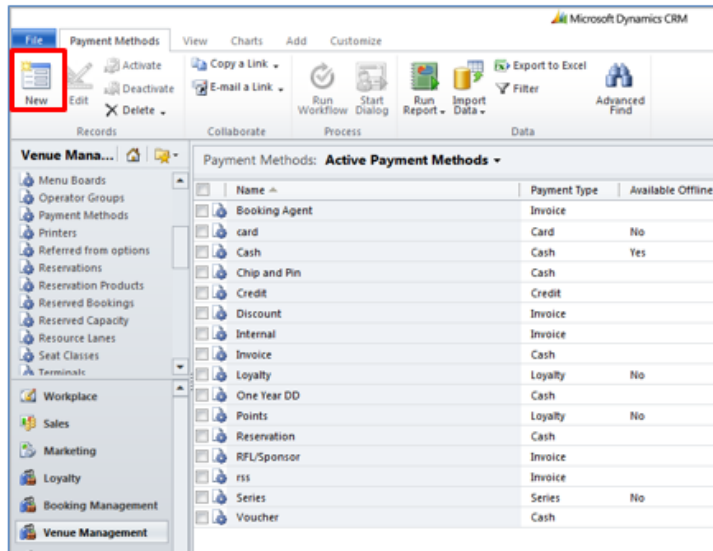
c) To create a new payment method, select **New** on the ribbon (highlighted above). If a payment method for reservations is already set up, there is no need to create a new one.

d) A blank Payment Method form will be displayed:

e) Complete the following details:

- **Name.** Enter a name for the payment type, for example "Reservation".

- **Payment Type.** Select **Reservation** as the Payment Type from the drop-down list.

- **Description.** Enter a description of the payment method.

- No other fields on this form need to be completed, all radio button type fields will default to the appropriate selection

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

> **Note:** As the payment method is going to be used in the background by the system, it is not necessary to link the payment method to a channel.
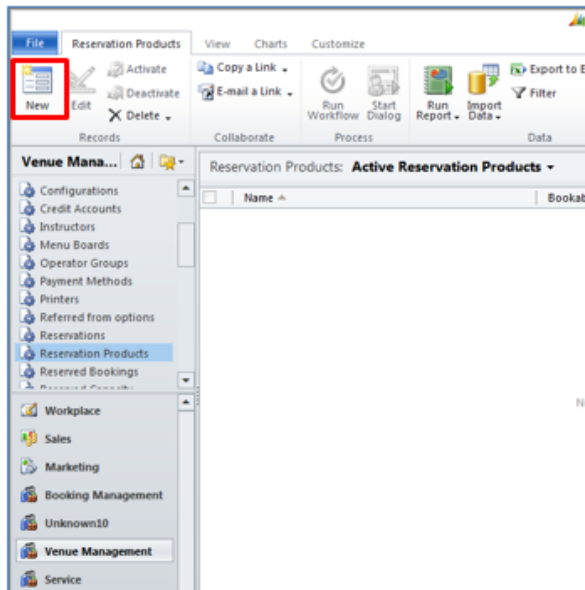
Record Created

Record Type	Name	Payment Type	Channel
Payment Method	Reservation	Reservation	None

1.2 CREATE THE SOURCE RESERVATION PRODUCT

The source reservation product represents the product that customer already holds, for example a season ticket for the current season. To create the source reservation product:

a) In the CRM **Navigation Panel**, select **Venue Management** followed by **Reservation Products**.

b) All Active Reservation products will be displayed:

c) Select **New** on the ribbon (highlighted above).

d) A blank Reservation Product form will be displayed:

e) Complete the following details:

- **Name.** Enter a name for the reservation product.

- **Series or Fixture.** Select whether reservation product relates to a series or a fixture. For example, if the source product held by the customer is a season ticket, select **Series**.

- **Series.** If the reservation product relates to a series, use the Look up Records dialog to search for the series.

- **Fixture.** If the reservation product relates to a fixture, use the Look up Records dialog to search for the fixture.

- **Bookable Product.** Use the Look up Record dialog to select the bookable product held by the customer.

- Once the details are complete select **Save and Close**.

Records Created

Record Type	Name	Series/Fixture	Series	Fixture	Bookable Product
Reservation Product	Source Product	Series	League & Cup Matches	n/a	League & Cup Season Ticket - Standard

1.3. CREATE THE TARGET RESERVATION PRODUCT

The target reservation product represents the product that the reservation will be made for, for example a season ticket for the new season, or a fixture ticket at a preseason friendly. To create the target reservation product:

a) In the CRM **Navigation Panel**, select **Venue Management** followed by **Reservation Products**.

b) The Reservation Products view will be displayed:
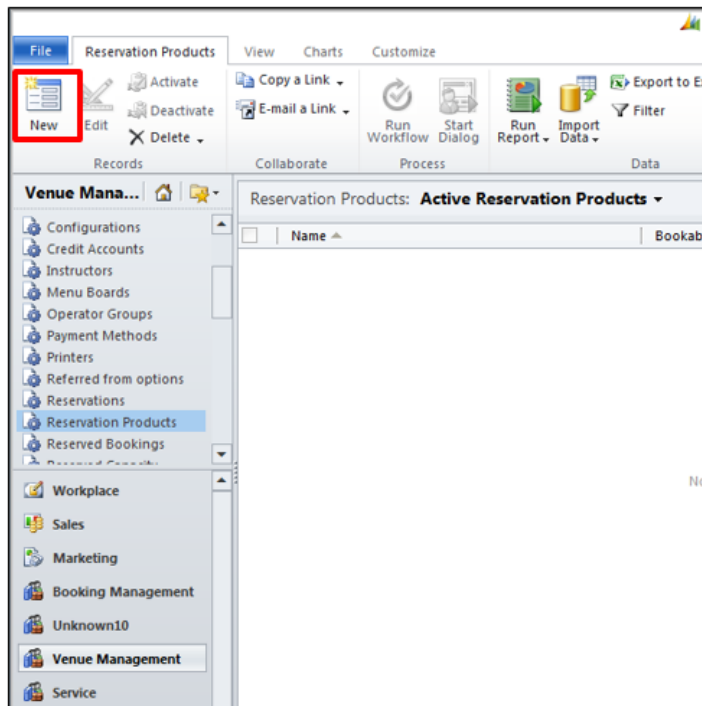
c) Select **New** on the ribbon (highlighted above).

d) A blank Reservation Product form will be displayed:

e) Complete the following details:

- **Name.** Enter a name for the reservation product.

- **Series or Fixture.** Select whether reservation product relates to a series or a fixture. For example, if the target product is a new season ticket, select Series, or alternatively if the reservation is for a friendly match, select Fixture.

- **Series.** If the reservation product relates to a series, use the Look up Records dialog to search for the series.

- **Fixture.** If the reservation product relates to a fixture, use the Look up Records dialog to search for the fixture.

- **Bookable Product.** Use the Look up Record dialog to select the bookable product held by the customer. The Bookable Product must be linked to the same Bookable Resource as the source reservation product so that the seats can be matched.

f) Once the details are complete select **Save and Close**.

Records Created

Record Type	Name	Series/Fixture	Series	Fixture	Bookable Product
Reservation Product	Target Product	Fixture	n/a	Cup Match 2	League & Cup Fixture Ticket - Standard

1.4   CREATE THE RESERVATION

Having created the source and target reservation products, you can create the reservation itself. The reservation effectively joins the source and target products providing that the Bookable Resources match and creates a reservation for each customer holding the source product. To create a reservation:

a)   In the CRM **Navigation Panel**, select **Product Management** followed by **Reservations**.

b)   The Reservations view will be displayed:
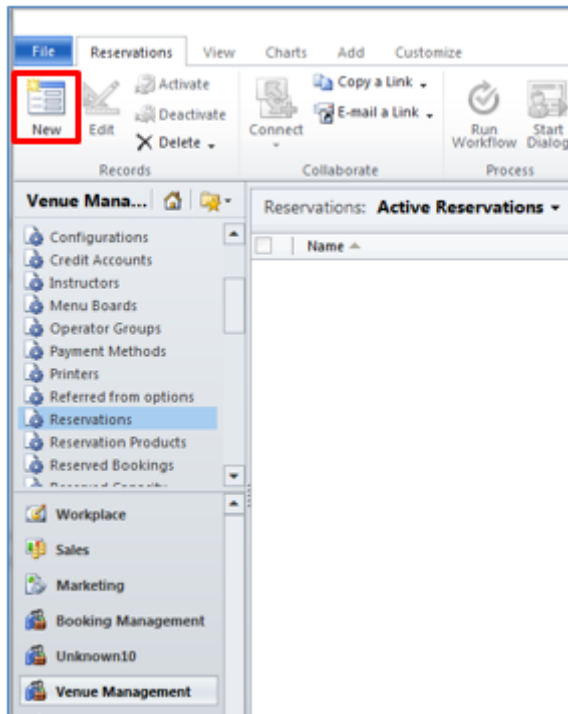
c)   Select **New** on the ribbon (highlighted above).

d)   A blank Reservation form will be displayed:

e)   Complete the following details:

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

- **Expiry Date and Time.** Enter the date and time the reservations will expire. The customer must purchase the reserved tickets on or before the date and time entered. If the reserved ticket is not purchased on or before the expiry date/time the tickets will be returned to general sale.

- **Source Reservation Product (Series).** Select the source reservation product created as shown in section 1.2 creating the Source Reservation Product.

- **Target Reservation Product.** Select the target reservation product created as shown in section 1.3 creating the Target Reservation Product.

- **Sequence.** Enter the sequence number for the reservation. The reservation number determines the priority of reservations when you have different source reservations products feeding into the same target reservation product. For more details see the example below.

- **Discount Percentage.** If applicable enter a Discount Percentage, this will be deducted from the current price of the reservation product. For example, if 50.00 is entered, when the reservation product is added to the basket in the POS or Web it will be displayed with a 50% discount.

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

g)   Once you have saved the reservation record the reservations will be automatically created.

Note: The reservation will only become available to the customer once their source product ticket has been printed.

Records Created

Record Type	Name	Source	Target
Reservation	Cup Match Reservation	Source Product	Target Product

1.5 PURCHASING RESERVED TICKETS

Reservations on the POS:

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

a) Select the **Buy Tickets** option**.**

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

c) To change the Variant of the reserved product, select **Change Variant**.

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

Buying Group reserved tickets on the POS:

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

To buy group reserved tickets:

a) In EPOS open up a customers **Booking Details** before selecting **View Purchaser** and the **Reserved Seats** tab.

b) Select the seats that are to be bought as part of a group by selecting them in the Buy Seats collum of the Reserved Seats form (See below).

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

d) This will open the Select Product Variant Form.

e) Select **Change Variant**. A new form will open where it is possible to choose the group Variant, for example a Family.

f) When the new group variant has been selected, the Select Product Variant form will be displayed again. Select **Ok** to continue to purchase this group of tickets

Reservations on the Web

Reservations also show on the Web. Single and Group Reserved tickets can be purchased on the Web. The example below shows how a reservation is displayed on the web:

2. USING SEQUENCE NUMBER

If you sell two types of season tickets, for example Weekday League Games and Weekend League Games, and you wish for customers with both of these tickets types to be offered a match day ticket for an upcoming cup match.

In this example you could have two people using the same seat, i.e. Susan Jones sits in seat A1 at the weekend (using her weekend season ticket), whereas John Smith sits in seat A1 during the week (using his weekday season ticket). When you set up the reservation, you must therefore decide which source product takes priority. The reserved seat will be offered to the individual holding the priority ticket only. In Green 4 Ticketing priority is set using the sequence number on the reservation.

The table below explains how the sequence numbers could be used:

Customer Name	Season Ticket Type	Season Ticket Priority	Seat Number	Target Seat Reserved?
Susan Jones	Weekend League Games	1	A1	Yes
John Smith	Weekday League Games	2	A1	No
Helen Milton	Weekday League Games	2	A2	Yes

Holders of lower priority source products will only receive a reserved ticket if the seat they usually occupy is not distributed through a higher priority reservation.

To set up reservations for two source products carry out the following:

a) Create a Source Reservation Product for the **Weekend League Games** series

b) Create a Source Reservation Product for the **Weekday League Games** series.

c) Create a Target Reservation Product for the **Cup Match**.

d) Create a reservation to link the **Weekend League Games** reservation product to the **Cup Match**. Ensure that the sequence number is set to 1 (this is the priority)

e) Create a reservation to link the **Weekday League Games** reservation product to the **Cup Match**. Ensure that the sequence number is set to 2.

Note: When creating reservations using a number of source reservation products, it is important that you create the reservations in order of priority, i.e. you create the highest priority reservations first.