

CRM DRIVEN SOLUTIONS FOR SPORT & LEISURE

GREEN 4 TICKETING RESERVATIONS USER GUIDE V3.7



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ABOUT THIS DOCUMENT

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

NON-DISCLOSURE

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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
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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



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.

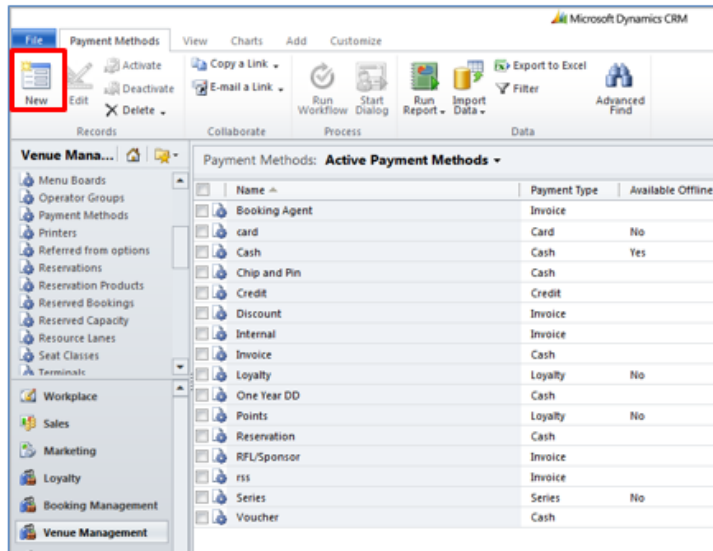
To set up a reservation for the example above carry out the following:



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

- In the CRM **Navigation Panel**, select **Venue Management** followed by **Payment Methods**.
- The Payment Methods view will be displayed:



- 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.
- A blank Payment Method form will be displayed:

Payment Method New

General

Name *

Payment Type Description

External Payment ID Available Offline ☒ No ☐ Yes

Set amount to booking total ☒ No ☐ Yes Auto Pay ☒ No ☐ Yes

Sequence Number Provider Version

Post Redirect

Error Redirect Collect Account Data ☒ No ☐ Yes

Auto Advance Days Auto Expiry Days

Code

Charges

Charge Amount £ Charge Percentage

Tab Payment

Tab Visibility Global ☒ No ☐ Yes

- 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.

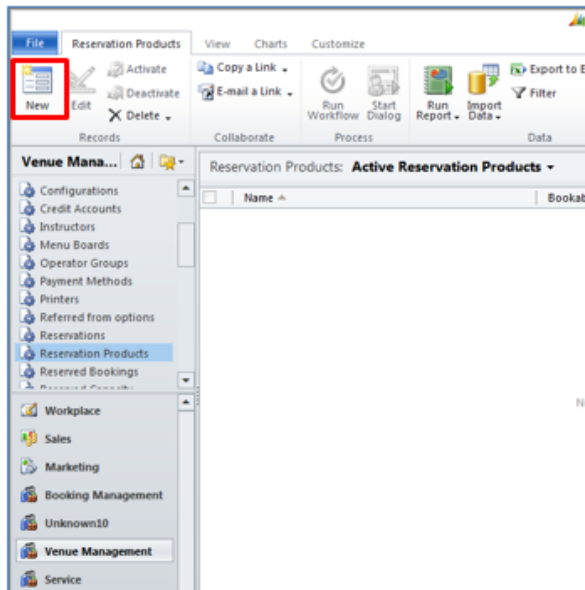
Record Created

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:

- In the CRM **Navigation Panel**, select **Venue Management** followed by **Reservation Products**.
- All Active Reservation products will be displayed:



- Select **New** on the ribbon (highlighted above).
- A blank Reservation Product form will be displayed:

The screenshot shows the 'New Reservation Product' form in Microsoft Dynamics CRM. The title bar indicates 'Microsoft Dynamics CRM' and 'CRM2011 Administrator STADIUM'. The ribbon has tabs for 'File', 'Reservation Product', and 'Customize'. The 'Reservation Product' tab is active, showing buttons for 'Save', 'Save & Close', 'Delete', 'Sharing', 'Copy a Link', 'E-mail a Link', 'Run Workflow', 'Start Dialog', and 'Run Report'. The main area is titled 'Reservation Product New' and contains a 'General' section with the following fields:

- Name ***: Text input field.
- Series or Fixture ***: Dropdown menu.
- Series**: Text input field with a magnifying glass icon.
- Fixture**: Text input field with a magnifying glass icon.
- Bookable Product ***: Text input field with a magnifying glass icon.

On the left side of the form, there is a 'Related' section with links to 'Audit History', 'Reservations', and 'Processes' (Workflows, Dialog Sessions).

- 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**.

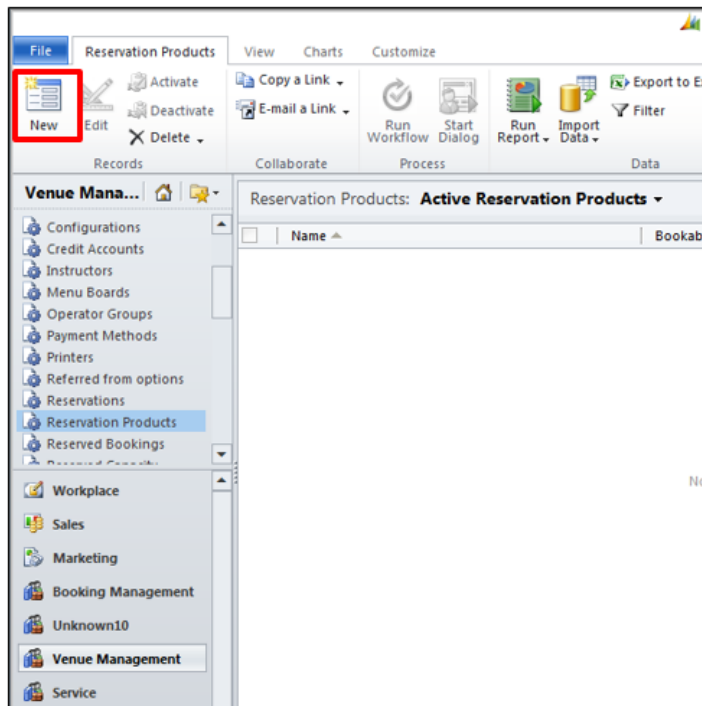
Records Created

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:

- In the CRM **Navigation Panel**, select **Venue Management** followed by **Reservation Products**.
- The Reservation Products view will be displayed:



- Select **New** on the ribbon (highlighted above).
- A blank Reservation Product form will be displayed:

- 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**.

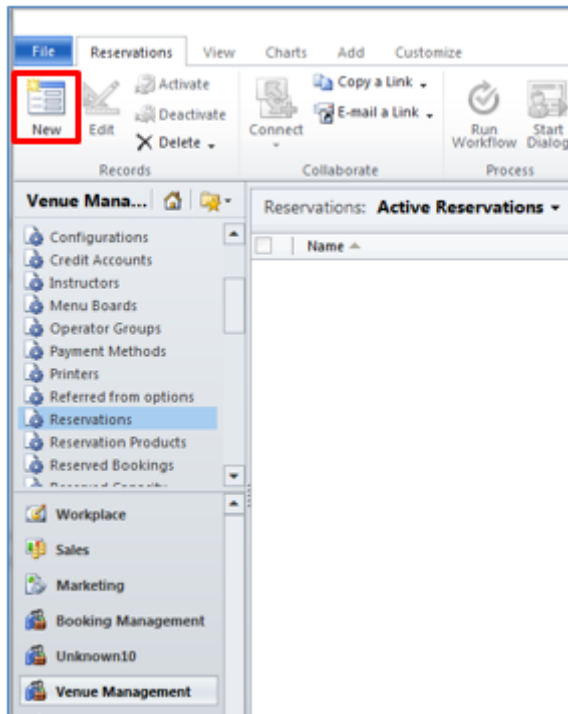
Records Created

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:

- In the CRM **Navigation Panel**, select **Product Management** followed by **Reservations**.
- The Reservations view will be displayed:



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

Event	Product	Orig Variant	Seat	Product User	Buy Seats
Champions League Fixtures	Champions League Series 2	Student	Block A - B3	Joe Walker	
Champions League Fixtures	Champions League Series 2	OAP	Block A - B4	Mum Murphy	
Champions League Fixtures	Champions League Series 2	Junior	Block A - B5	Junior Murphy	
Champions League Fixtures	Champions League Series 2	Adult	Block A - B6	Jenny Murphy	
Champions League Fixtures	Champions League Series 2	Adult	Block A - C3	Jenny Murphy	
Champions League Fixtures	Champions League Series 2	Junior	Block A - C4	Junior Murphy	
Champions League Fixtures	Champions League Series 2	OAP	Block A - C5	Mum Murphy	
Champions League Fixtures	Champions League Series 2	Student	Block A - C6	Joe Walker	
Cup Matches 2014/2015	Cup Match Series 2014/201	Student	Block A - B3	Joe Walker	
Cup Matches 2014/2015	Cup Match Series 2014/201	OAP	Block A - B4	Mum Murphy	
Cup Matches 2014/2015	Cup Match Series 2014/201	Junior	Block A - B5	Junior Murphy	

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

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

Event	Product	Seat	Variant
Champions League Fixtures	Champions League Series 2	JW Block 1 - A	Adult

Variant	Quantity	Select
Adult	1	Select
Junior	1	Select
OAP	1	Select
Student	1	Select

- 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 multiple selection of single reserved tickets into a group ticket, e.g. a family ticket. Note: an appropriate 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:

- In EPOS open up a customers **Booking Details** before selecting **View Purchaser** and the **Reserved Seats** tab.
- Select the seats that are to be bought as part of a group by selecting them in the Buy Seats column of the Reserved Seats form (See below).

Information	Photo	Booking History	Reserved Seats	Addresses	On hold status	Declaration
Event	Product	Orig Variant	Seat	Product User	Buy Seats	
Champions League Fixtures	Champions League Series 2	Adult	JW Block 1 - A	Joseph Walke	<input type="checkbox"/>	
Champions League Fixtures	Champions League Series 2	Adult	JW Block 1 - A	Joseph Walke	<input type="checkbox"/>	
Champions League Fixtures	Champions League Series 2	Adult	JW Block 1 - A	Joseph Walke	<input type="checkbox"/>	
Champions League Fixtures	Champions League Series 2	Adult	JW Block 1 - A	Joseph Walke	<input type="checkbox"/>	

- 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.

Newcastle V Green 4	Away Match	Adult	JW Block 1 - A	Joseph Walke	<input type="checkbox"/>		
Newcastle V Green 4	Away Match	Adult	JW Block 1 - A	Joseph Walke	<input type="checkbox"/>		
		<input type="button" value="Add on-hold"/>	<input type="button" value="Add Address"/>	<input type="button" value="Buy Group"/>	<input type="button" value="Buy Tickets"/>	<input type="button" value="OK"/>	<input type="button" value="Cancel"/>

- This will open the Select Product Variant Form.
- Select **Change Variant**. A new form will open where it is possible to choose the group Variant, for example a Family.
- 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

Select Product Variant

Event	Product	Seat	Variant
Champions League Fixtures	Champions League Series 2	JW Block 1 - A	Change Variant

OK Cancel

Select

Variant	Quantity
Family	4

Cancel

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:

File Edit View Favourites Tools Help

GREEN4 F.C. Shopping basket Your account Logout

Welcome back Joseph Walker

HOME MATCH TICKETS SEASON TICKETS CASHLESS MERCHANDISE OFFERS RESERVATIONS LOYALTY ACCOUNT

Reservations

Champions League Fixtures 2014/2015 - Champions League Series 2014/2015

Product User	Seat
Joseph Walker	JW Block 1 - A14
Joseph Walker	JW Block 1 - A16
Joseph Walker	JW Block 1 - A20
Joseph Walker	JW Block 1 - A6
Joseph Walker	JW Block 1 - A7
Joseph Walker	JW Block 1 - A9
Joseph Walker	JW Block 1 - B20

Buy group Buy tickets

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:

- Create a Source Reservation Product for the **Weekend League Games** series
- Create a Source Reservation Product for the **Weekday League Games** series.
- Create a Target Reservation Product for the **Cup Match**.
- 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)
- 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.