CRM 2015

FOOD & BEVERAGE MEAL DEALS SETUP

USER GUIDE

green4 SOLUTIONS

THE QUEEN'S AWARDS FOR ENTERPRISE: 2014

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ABOUT THIS DOCUMENT

This document has been prepared as a User Guide for the setup of Meal Deals in CRM 2015.

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DOCUMENT CONTROL

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INTRODUCTION

FOOD & BEVERAGE

The Meal Deal functionality from Go has been developed to give the operator the ability to select individual products as part of a Meal Deal. For example a Meal Deal may consist of a Pie, a Pint and a Snack. Now the User will be able to select from a list, the specific components of the Meal Deal, such as the type of Pie, the type of Pint and the type of Snack that they would like to make up their Meal Deal.

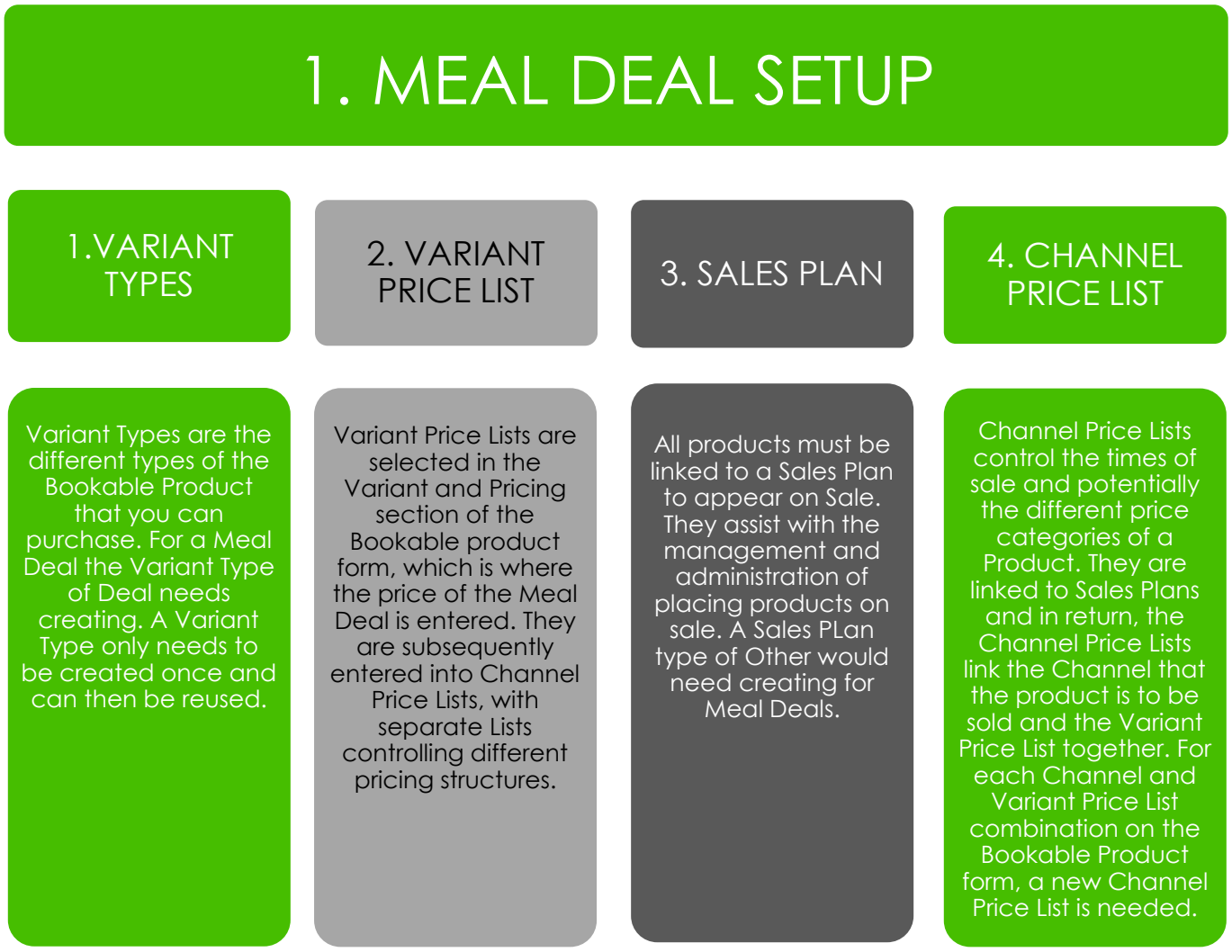
The table below gives an overview of the areas that can be found in this document regarding Meal Deals.

MEAL DEALS

1. MEAL DEAL SETUP	2. MEAL DEAL CONFIG	3. OPTIONAL EXTRAS	4. MEAL DEAL REPORTS
Before Meal Deals can be configured a range of setup requirements must be done. Before any of the Meal Deal Configurations are created, it is important that Variant Types, Variant Price Lists, a Default Sales Plan and Channel Price List have been setup. Some of these may already be setup within the system and therefore will not need creating again.	There are many ways a Meal Deal can be configured within CRM 2015. Each configuration listed in this document will sell the Meal Deal differently. For example Meal Deal 1 will be sold as a standard Bookable Product with no option to select the particular products within the Meal Deal whereas Meal Deal 2 and 3 allow options of products which form Meal Deal.	After configuring a Meal Deal in CRM it is also possible to have Optional Extras displayed which the operator can add to the Meal Deal for an extra cost. For example a customer may have elected to have a Meal Deal, and with this particular Deal for an additional cost it may be possible for the operator to select another product that can be sold with the Meal Deal.	A Meal Deal Report is available within CRM 2015 and can be generated to display the Meal Deals sold and the Meal Deal choices that have been selected. Any optional extras that have been added to the Meal Deal are also shown in the report. This allows the status of certain Meal Deals to be reviewed quickly and easily.

1. MEAL DEAL SETUP

The setup section of this document gives instruction on the initial setup that must take place before it is possible to place a Meal Deal on sale. Before any of the Meal Deal Configurations can be set up, the setup shown below must have taken place.



1.1. VARIANT TYPE- DEAL

VARIANT TYPE- DEAL → VARIANT PRICE LIST → SALES PLAN → CHANNEL PRICE LIST

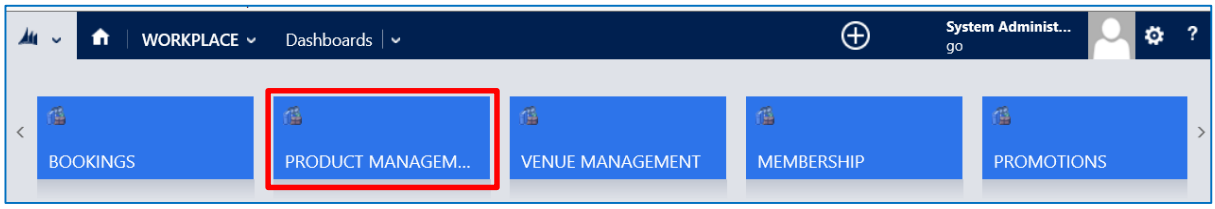
Variant Types describe the type of Bookable Products that can be purchased and for Meal Deals a Variant Type of **Deal** needs creating.

When a Variant Type has been created in the Go system, it can be reused for different product types. Before setting up a new Variant Type, check that it does not already exist, if it does, this step can be skipped.

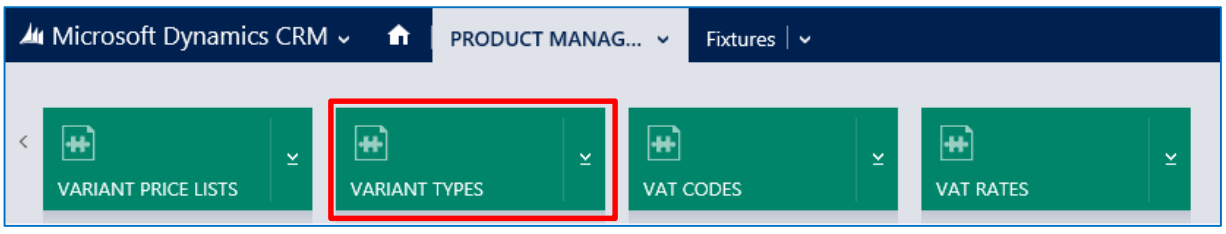
The Variant Types are added in the Variant and Pricing section of the Bookable Product form having been chosen from the drop down list.

To create a new Variant Type record:

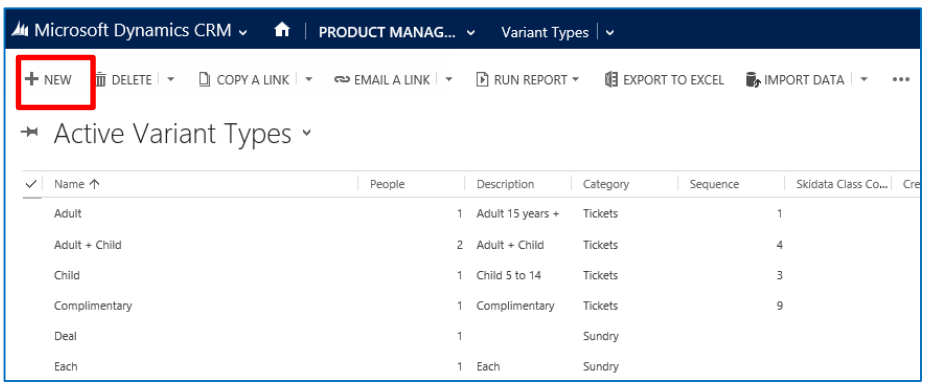
a) Select or hover over the **Microsoft Dynamics CRM** tab before scrolling across the drop down list of the navigation bar and selecting **Product Management**.



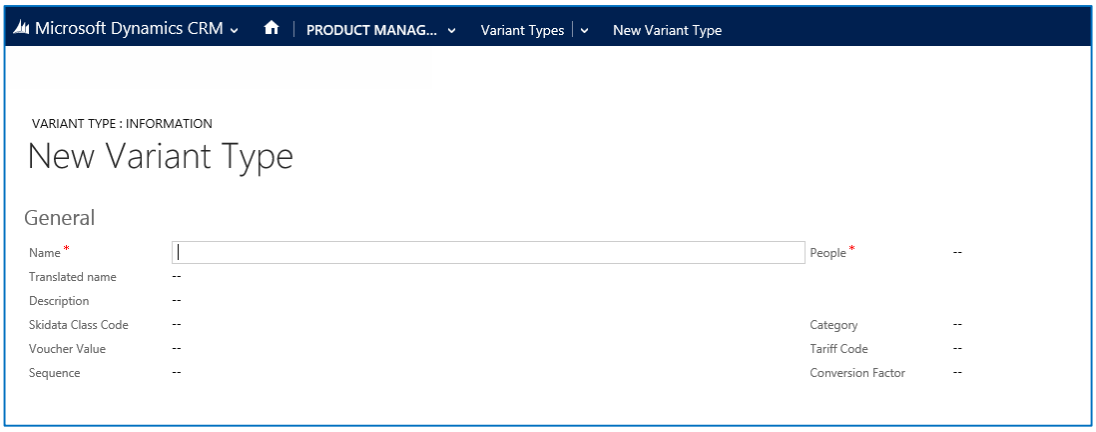
b) Next, in the Product Management area of CRM, select the **Product Management** tab before scrolling across the drop down list of the navigation bar and selecting **Variant Types.**



c) A list of currently Active Variant Types will be displayed, remember that a Variant Type only needs creating once as it can be reused. To create a New Variant Type, choose **New** on the ribbon.



d) A blank Variant Type form will be displayed, complete the following details:



- **Name.** Enter a name for the Variant Type e.g. Deal
- **Translated Name.** This field is only used when the system is being translated into another language.
- **Description.** If applicable, enter a description of the Variant Type.
- **Sequence.** If applicable enter a sequence number for the order the Variant Types are to be displayed in.
- **People.** Enter the number of people included in the Variant Type. For a Variant Type of Deal, enter 1.
- **Category.** If applicable, use the Look Up to find or create a new Category for the Variant Type, for example, a category named Meal Deal could be created. By categorising this it will make it easier to find the appropriate Variant Type when adding them in the Bookable Product.

Note. All other fields in the Variant Type form that have not been described above do not need to be completed/changed.

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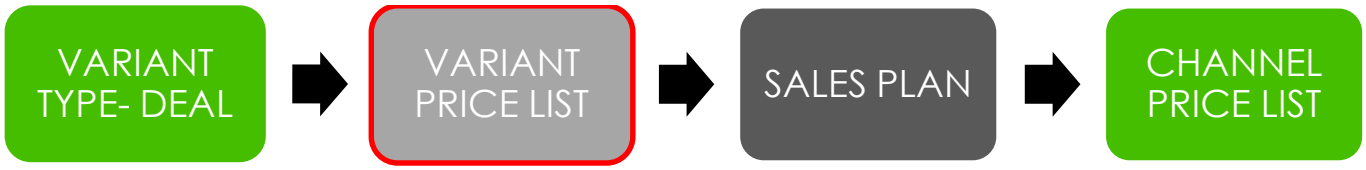
e) Select **Save and Close** on the ribbon to save the Deal Variant Types.

EXAMPLE OF A DEAL VARIANT TYPE RECORDS CREATED

The table below shows the fields that have been completed for the Variant Type of Deal

Record Type	Name	People	Category
Variant Type	Deal	1	Meal Deal

1.2. VARIANT PRICE LISTS

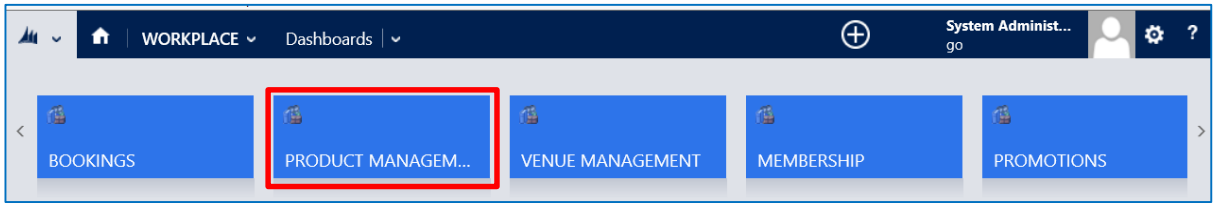


A Variant Price List must be created as this is where the cost of a product is entered into for the Deal Variant Types in the Variant and Pricing section of the Bookable Product form. The Variant Price Lists are also subsequently linked to the Channel using the Channel Price List entity.

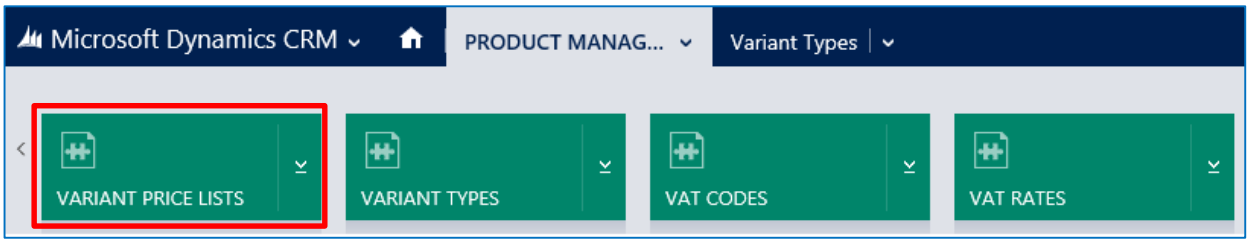
One Variant Price List can be created for all Meal Deal Bookable Products.

To create a new Variant Price List for the Meal Deals, complete the following:

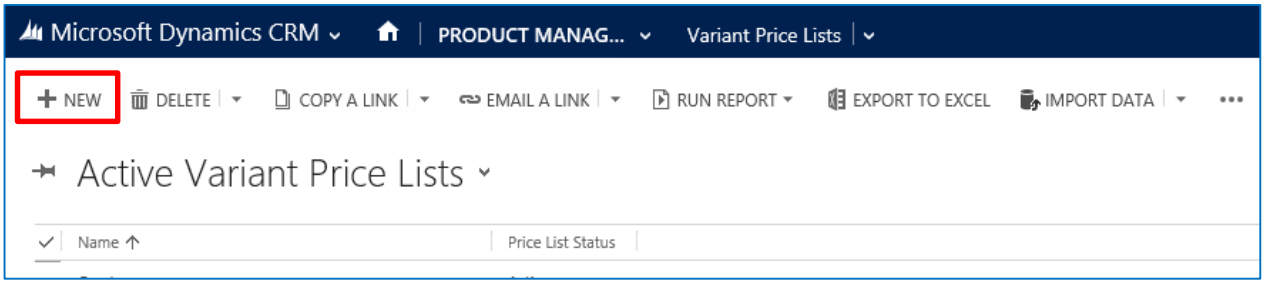
a) Select or hover over the **Microsoft Dynamics CRM** tab before scrolling across the drop down list of the navigation bar and selecting **Product Management**.



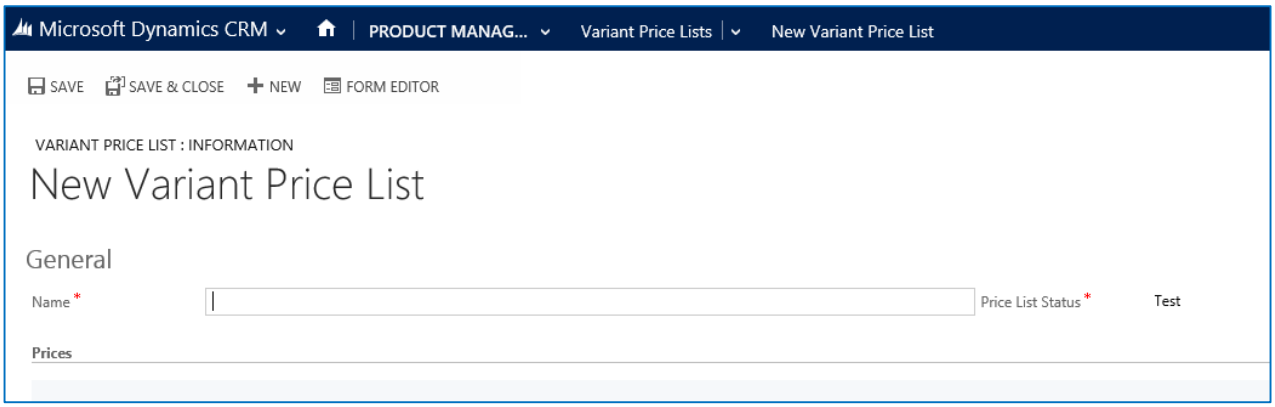
b) Next, in the Product Management area of CRM, select the **Product Management** tab before scrolling across the drop down list of the navigation bar and selecting **Variant Price Lists.**



c) A list of currently active Variant Price List view will be displayed. Select **New** on the ribbon.



d) The Variant Price List form will be displayed. Complete the following details:



- **Name.** Enter a name for the Price List.
- **Price List Status.** Select the Price List status from the drop-down list. Only price lists with a status of **Active** will be used to provide pricing information.

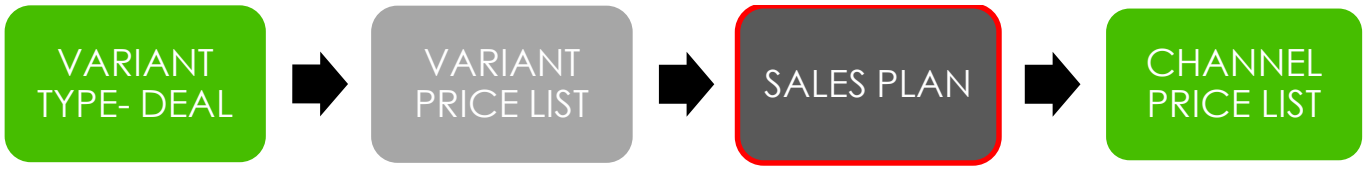
e) Select **Save and Close** on the ribbon, repeat the above process for each Variant Price List that needs to be created.

EXAMPLE OF VARIANT PRICE LIST RECORD CREATED

A Meal Deal Variant Price List has been created as examples for this document and is displayed in the table below.

Record Type	Name	Price List Status	Used for
Variant Price List	Meal Deals	Active	Meal Deal Products

1.3. SALES PLANS

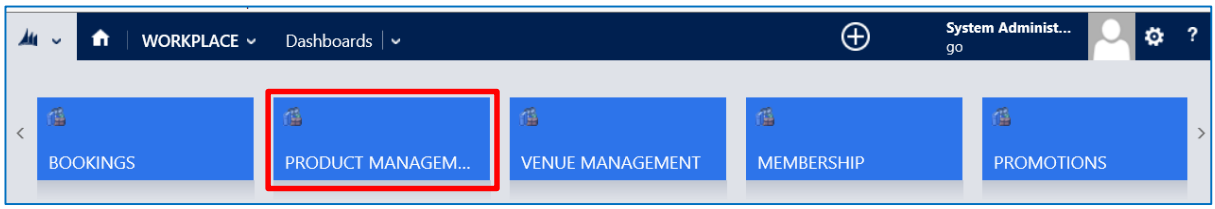


Sales Plan functionality assists with the management and administration of putting products on sale. They are used for all product types.

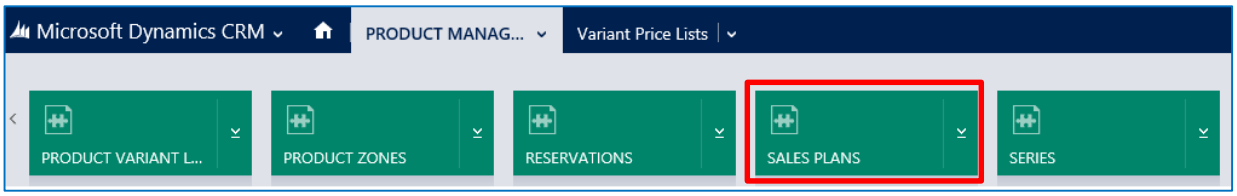
For Meal Deals only one Sales Plan of type Other needs to be created. If a Sales Plan of type Other already exists on the system then this section can be skipped to the Channel price List section.

To create a new Sales Plan of type Other, complete the following:

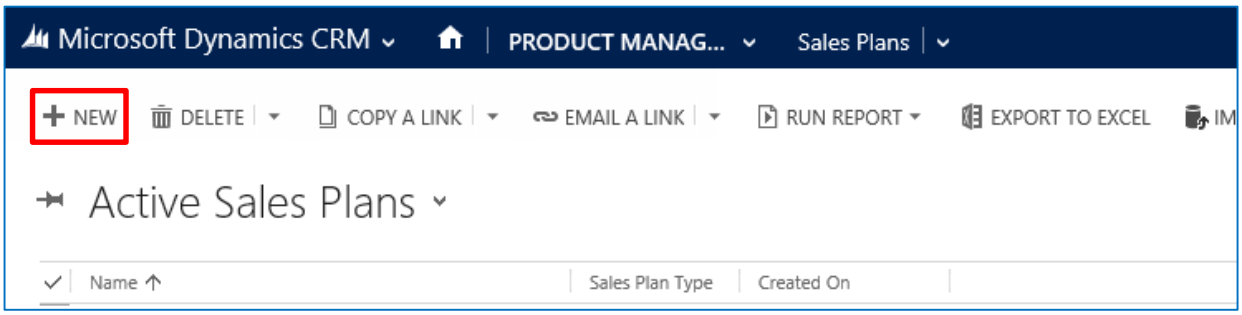
a) Select or hover over the **Microsoft Dynamics CRM** tab before scrolling across the drop down list of the navigation bar and selecting **Product Management**.



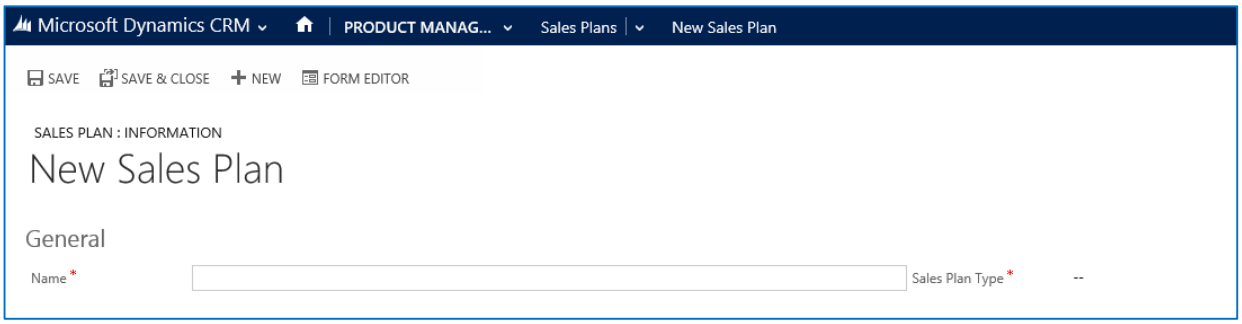
b) Next, in the Product Management area of CRM, select the **Product Management** tab before scrolling across the drop down list of the navigation bar and selecting **Sales Plans.**



c) A list of currently active Sales Plans will be displayed, select **New** in the ribbon.



d) A blank Sales Plan form will be displayed. Complete the following:



- **Name.** Enter a name for the Sales Plan.
- **Sales Plan Type.** From the drop down menu select the Sales Plan Type of **Other.** Please note that only one Sales Plan type of Other needs to be created and it should be added to the **Current Sales Plan** field of the **Company Details** form in CRM.

e) Select **Save and Close** on the ribbon.

EXAMPLE OF SALES PLAN TYPE OTHER RECORDS CREATED

A Sales Plan of type Other has been created as examples for this document and is displayed in the table below. Channel Price Lists must then be linked to the Sales Plan, (shown in the next section).

Record Type	Name	Type
Sales Plan	Default Sales Plan	Other (Linked to the Company Details form)

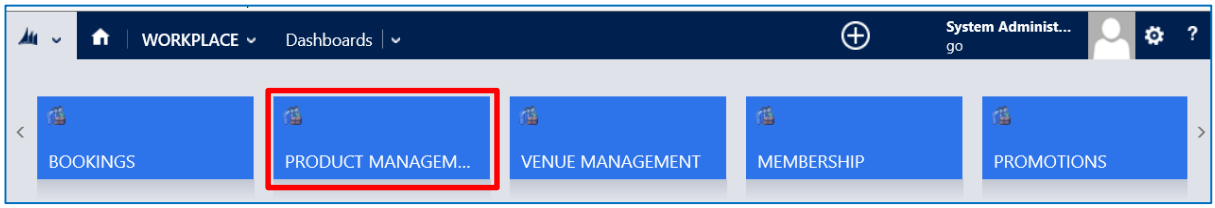
1.4. CHANNEL PRICE LISTS

Linked to Sales Plans are Channel Price Lists. Channel Price Lists link the Channel and Variant Price Lists together, for each Channel and Variant Price List combination in a Bookable Product a new Channel Price List must be created. Furthermore, the Channel Price List controls when a product goes on and off sale.

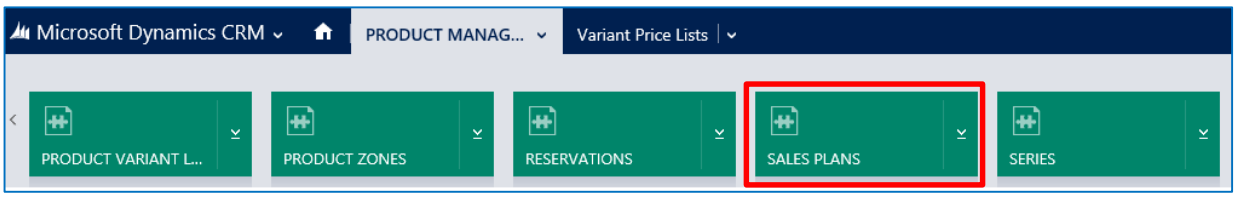
Different fields within the Channel Price List need completing depending on the type of product that is to be placed on sale. The example below show the fields that need completing when creating a Meal Deal.

To create a new Channel Price List 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**.

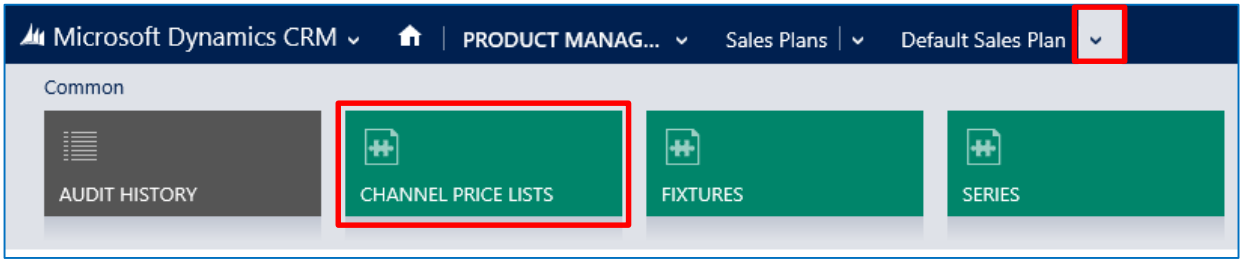


b) Next, in the Product Management area of CRM, select the **Product Management** tab before scrolling across the drop down list of the navigation bar and selecting **Sales Plans.**

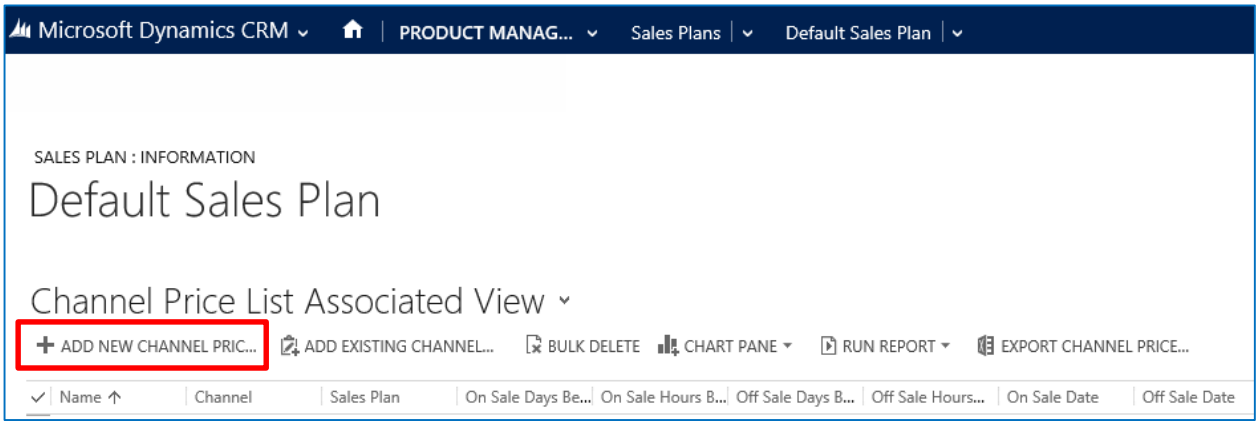


c) A list of Active Sales Plans will be displayed, select the Sales Plan type of Other which the Channel Price List is to be added to.

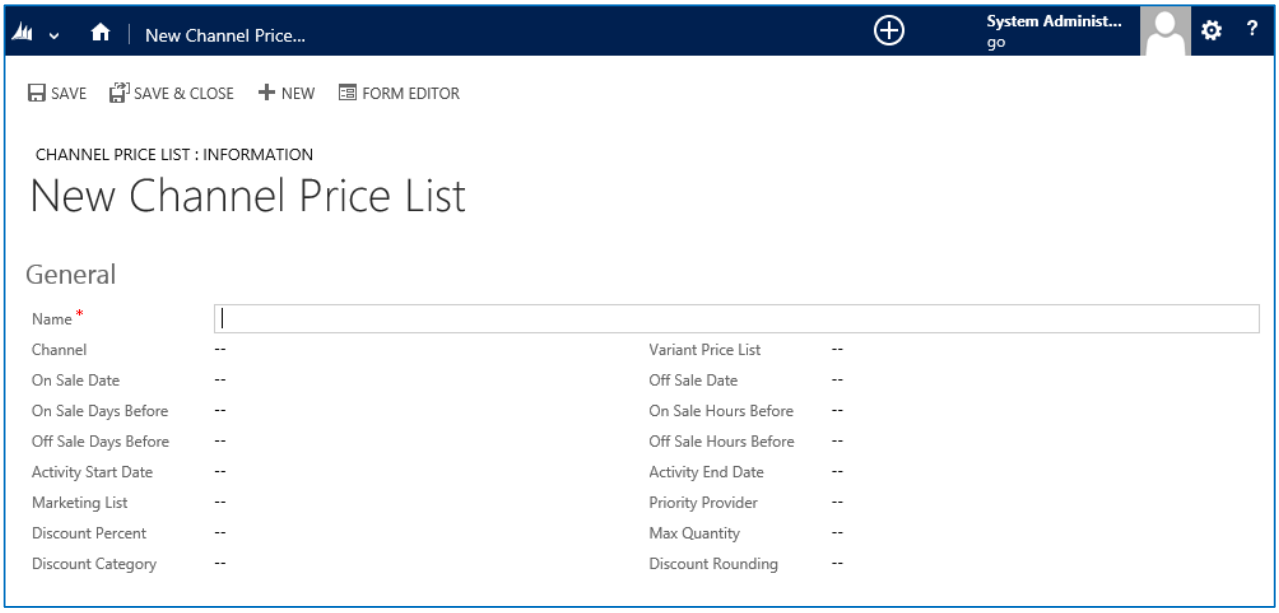
d) With the Sales Plan form open select the small arrow situated next to the name of the Sales Plan in the Navigation bar before choosing **Channel Price List** from the drop down.



e) A list of currently associated Channel Price Lists for that Sale Plan will be displayed, select **Add New Channel Price** List in the ribbon.



f) A blank Channel Price List form will be displayed, complete the following:



- **Name.** Enter a name for the Channel Price List. The name can be anything, but should be meaningful. We recommended including the Channel and Product which the Channel Price List relates to within the name. E.g. POS – Meal Deals
- **Channel.** Use the Look up to select the Channel the Price List applies to. For Meal Deals the POS Channel must be selected.
- **On Sale Date.** Enter a date when the Channel Price List comes into force and Meal Deal appears on sale.
- **Variant Price List.** Use the Look Up to search and find the appropriate Variant Price List that is to be used when selling this product such as the Meal Deal Variant Price List created previously.
- **Off Sale Date.** Enter a date when the Channel Price List expires and the Meal Deal comes off sale.

g) Select **Save and Close** on the ribbon.

Note: All other fields in the Channel Price List form that have not been described above do not need to be completed/changed.

EXAMPLE OF CHANNEL PRICE LIST RECORD CREATED

The example below continues from the Variant Price List and Sales Plan example that were previously created for this document. It shows the Sales Plan type Other that the Meal Deal Channel Price List is linked to.

Sales Plan Type	Channel Price List Name	Variant Price List	Channel	Other fields completed
Other type Sales Plan	POS – Meal Deals	Meal Deals	POS	On Sale Date Off Sale Date

2. MEAL DEAL CONFIGURATIONS

Meal Deals can be set up and configured in a number of ways from a very simple format of a single Bookable product representing the Meal Deal, to allowing the Customer to select specific types of products that make up the Meal Deals. The table below describes the different types of configurations and instructions on setting these up within CRM 2015.

Note. Before each Meal Deal Configuration has begun, it is assumed the Setup has taken place.

2. MEAL DEAL CONFIGURATIONS

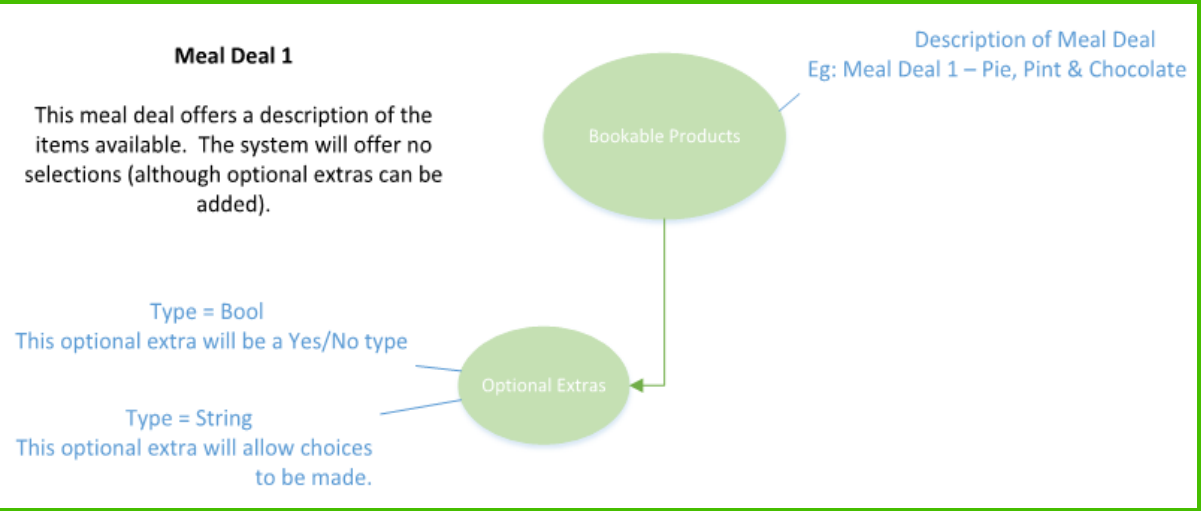
1. The Meal Deal consists of a specific product(s) but no specific variant(s)	2. The Meal Deal is a combination of products with any Variant and product specific Variants	3. The Meal Deal consists of products and specific Variants of all products
For example the Meal Deal could be made up of: 4 Pints of Beer and 4 Pies Or 3 Pints of Beer This is done by creating a standard Bookable Product with one associated Variant (The deal) e.g. A Burger and a Pint Meal Deal	For example the Meal Deal could be made up of: A pint of Carling and a Pie Or A pint of Carling and a Hotdog Or A pint of Carling and a Burger For this type of Meal Deal to be created, the Bookable Product must have a Product Modifier and Option Variants attached to it. The specific type of pint (e.g. a Carling, Fosters or Carlsberg) or pie (chicken, steak or vegetable) or chocolate bar (Snickers, Twix or Kit Kat) cannot be selected with this type of scenario.	This means the end customer will be able to choose each component of the Meal Deal. For example the Meal Deal could be made up of: A Pie, Pint and a Chocolate Bar But the end customer can choose what type of pie, pint or chocolate bar they would like, for example: The pie could be chicken, steak or vegetable The pint could be a Fosters, Carlsberg or Guinness The chocolate bar could be a Kit Kat, Twix or Snickers.

Note: Meal Deals do not reduce the stock of the components that make up the meal deal

2.1. MEAL DEAL 1: CREATING A MEAL DEAL THAT CONSISTS OF A SPECIFIC PRODUCT BUT NO SPECIFIC VARIANTS

This type of Meal Deal does not provide the operator or customer the option to select the specific products which form the Meal Deal, instead it gives a single broad option of a certain Meal Deal.

This type of Meal Deal can be created by setting up a standard Bookable Product, with one associated Variant (Deal) Type. The diagram below demonstrates how this type of Meal Deal can be created.



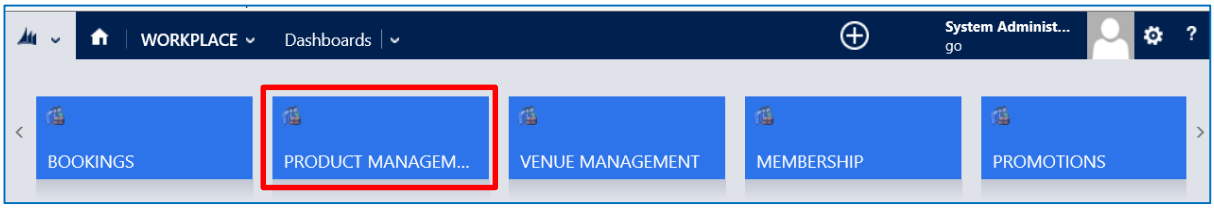
The Setup of the Meal Deal should already have been completed so that there is an appropriate Deal Variant Type, Variant Price List, Sales Plan and linked Channel Price List. If these have not been created, see Section 1 of this document.

STEP 1. CREATE THE MEAL DEAL BOOKABLE PRODUCT

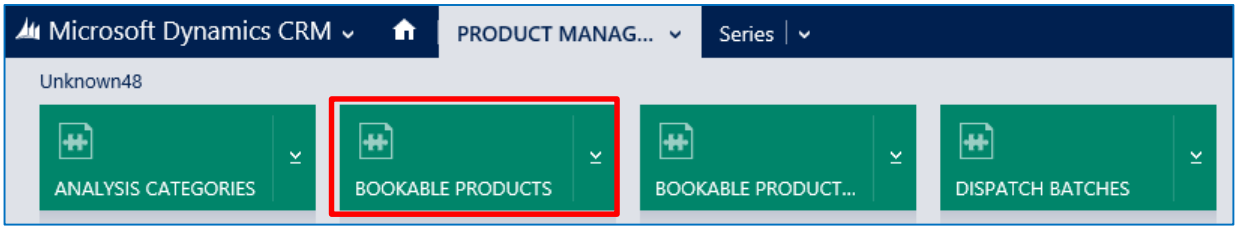
The Bookable Product entity is used to represent products that are sold, for example the Meal Deal is a bookable product. For every Meal Deal configuration you are selling through the system you must create the Bookable Product. For this first Meal Deal configuration, all that is required is a Stock type Bookable Product to be set up.

To do this, complete the following:

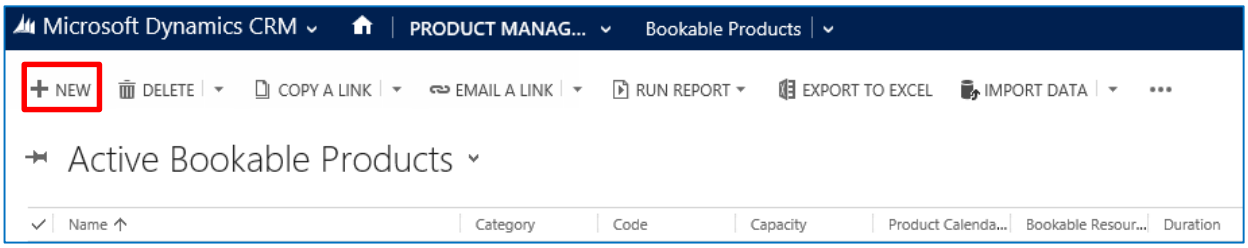
a) Select or hover over the **Microsoft Dynamics CRM** tab before scrolling across the drop down list of the navigation bar and selecting **Product Management**.



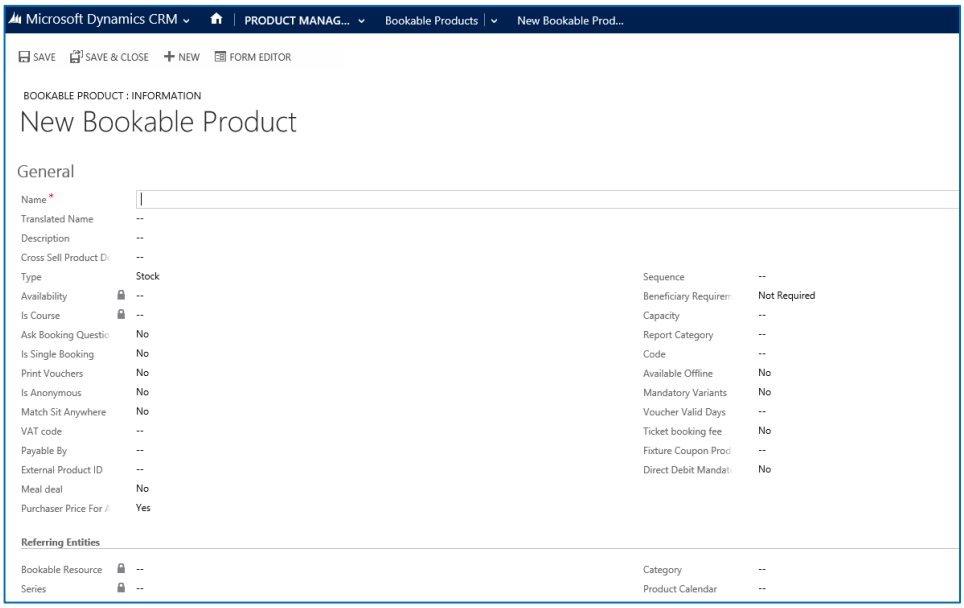
b) Next, in the Product Management area of CRM, select the **Product Management** tab before selecting **Bookable Products** from the drop down.



c) A list of the currently active Bookable Products will be displayed. Select **New** on the ribbon.



d) A blank Bookable Product form will be displayed. Complete the following:



General:

- **Name.** Enter a name for the product. The name will be visible to an operator and should therefore reflect the nature of the product. For example a Burger and a Pint of Fosters Meal Deal
- **Translated Name.** Used for translated implementations.
- **Description.** Enter a description of the product.
- **Type.** Use the drop-down list to select the type of product. In this instance select **Stock** from the list of available values.
- **Sequence.** If applicable, enter a sequence number for the product. The sequence number is used to determine the order in which products are displayed in the POS and Web channels.

- **Beneficiary Requirement.** Use the drop-down list to select if a customer's name is required when the product is purchased. For stock products this option should be set to **Not Required**.
- **Report Category.** Can be used for reporting purposes to categorise the products sold through Green 4 F&B.
- **Code.** Can be used to enter the barcode for products sold through the Green 4 F&B POS.
- **Is Anonymous.** Select **Yes** if the purchaser is not required to provide a name when buying the product. The channel must also be set to anonymous purchases.
- **Available Offline.** Select **Yes** if the bookable product is to be available for purchase through the offline POS. This option cannot be used for products which require capacity to be monitored.
- **Meal deal.** Select **Yes**, to show that this is a Meal Deal product. This is then used for reporting purposes.

Referring Entities:

- **Category.** Use the Look Up Records dialog to select the product category. The category is used to group products, for example Meal Deals.

Note. All other fields in the Bookable Product form that have not been described above do not need to be completed/changed.

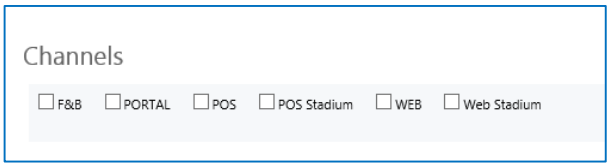
---

e) When the details are complete select **Save** on the ribbon.

f) Next, it is necessary to indicate which **Channels** the product can be bought. To set the Channels carry out the following:

i. Scroll down to the **Channels** section of the Bookable Product form

ii. The Channels that have been set up during the configuration on your system will be listed. Select the checkbox alongside each Channel through which the product will be sold.

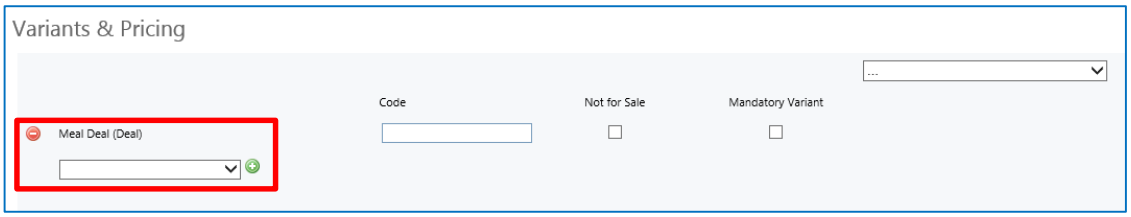


iii. Select **Save** on the ribbon.

g) Next, it is necessary to identify the Product Variants and Prices:

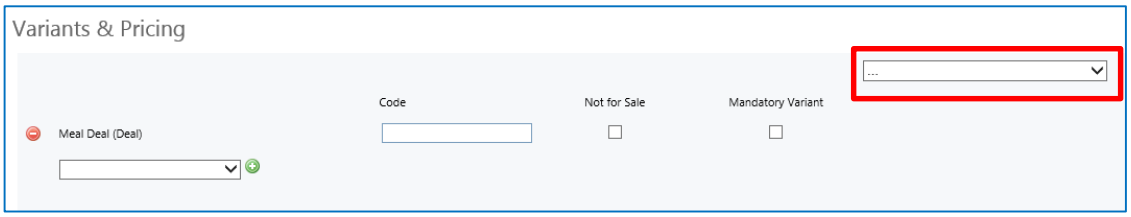
i. Scroll down to the **Variants & Pricing** section of the Bookable Product form.

ii. To select a **Variant**, in the drop-down list on the left hand side (highlighted below), select the appropriate option. All of the variants available in your system will be listed. If you have categorised the variants they will displayed in the relevant categories. For Meal Deals the Variant of **Deal** should be added.

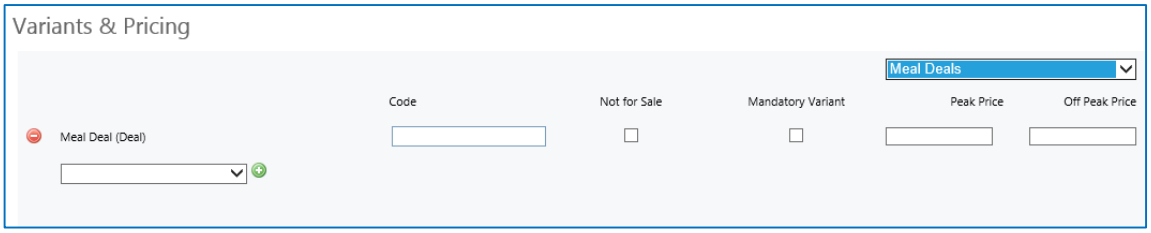


h) Next, the price of the product must be entered, to do this:

i. Select the relevant Meal Deal **Variant Price List** from the drop down at the right hand side of the Variants & Pricing section (highlighted below).



ii. Peak Price and Off Peak Price fields will appear upon selecting the appropriate Variant Price List. In both the Peak Price and Off Peak Pricing fields the same price information should be entered.



i) When the pricing details are complete select **Save** in the bottom right hand corner of the Bookable Product form.

EXAMPLE OF A BOOKABLE PRODUCT RECORD CREATED FOR MEAL DEAL 2

The table below shows the mandatory areas that must be completed in a Bookable Product form for Meal Deal 1. The example below and information entered has been created for this document.

Record Created	Name	Type	Category	Channel	Variant Type	Variant Price List	Pricing
Bookable Product	Burger and a Pint of Fosters	Stock	Meal Deals	F&B	Deal	Meal Deals	5.00

MEAL DEAL 1: OVERVIEW

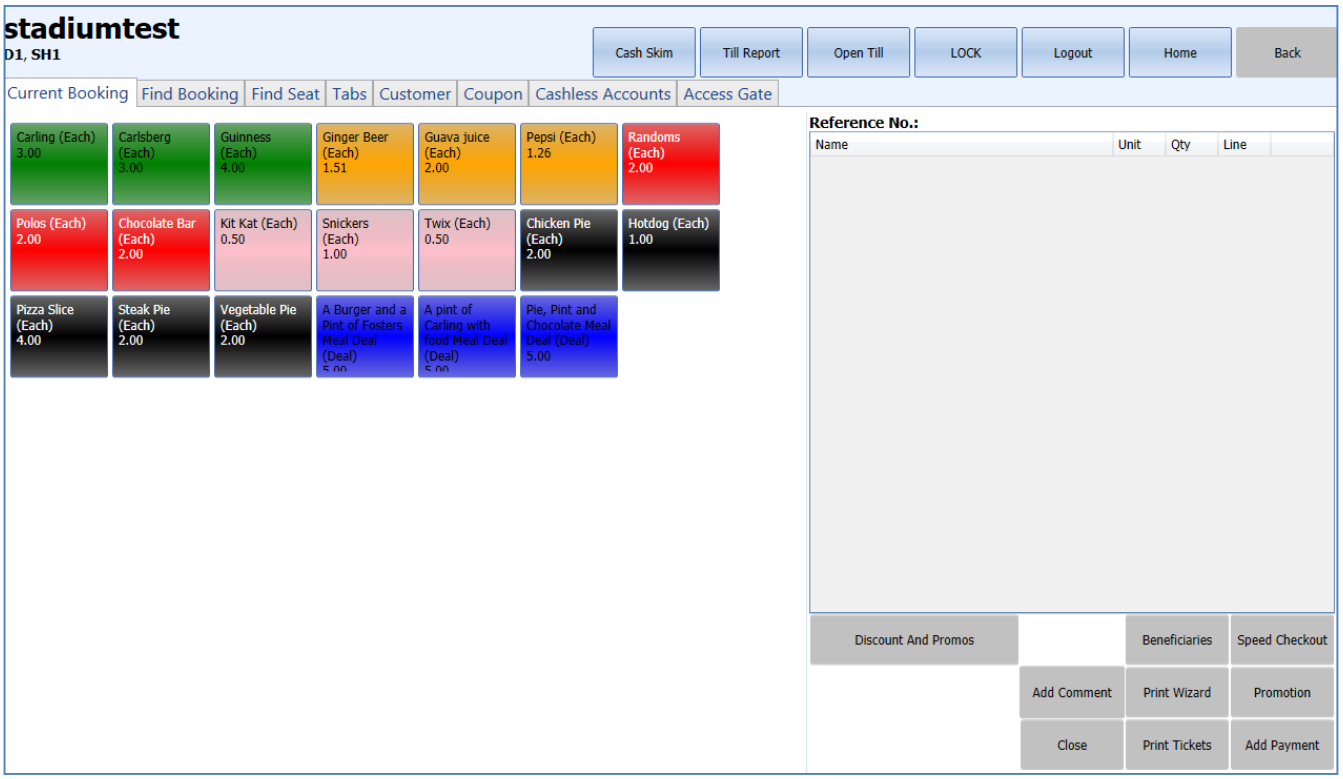
Task	Completed?	Comments
1. Created the Deal Variant Type		Ensure that a Variant Type of Deal has been created in CRM 2015. This Variant Type will only need creating once within the system
2. Created Variant Price Lists		Ensure an active Variant Price List has been created. This is where Prices are defined in the Bookable Product form and is linked to the Channel Price List
3. Created a Channel Price List		The channel price list should be linked to the Sales Plan type of Other. The Channel Price List should link the Channels to the Variant Price List on which prices have been entered. Ensure the Channel Price List dates are valid. A Channel Price List will need to be created for each Variant Price List – Channel combination created.
4. Created a Stock type Bookable Product		Ensure the Bookable Product Type is set as **Stock** Ensure the Meal Deal flag is set to **Yes** Ensure a **Category** for example, Meal Deal, has been entered
5. Assigned Channels to the Bookable Product		Ensure the relevant sale Channel check boxes are ticked.
6. Assigned the Variant (Deal) to the Bookable Product		Ensure the Variant Type (Deal) is listed.
7. Assigned prices to the Bookable Product		Prices should be added to an active Variant Price List that has been linked to a Channel Price List.

MEAL DEAL 1 IN THE POS

Upon completion of setting up this type of Meal Deal within CRM (A Burger and a Pint of Foster Meal Deal in this example) it will be displayed in the POS. Please note that the Meal Deals in this example are coloured in blue, as this is the colour selected for the Category type of Meal Deal.

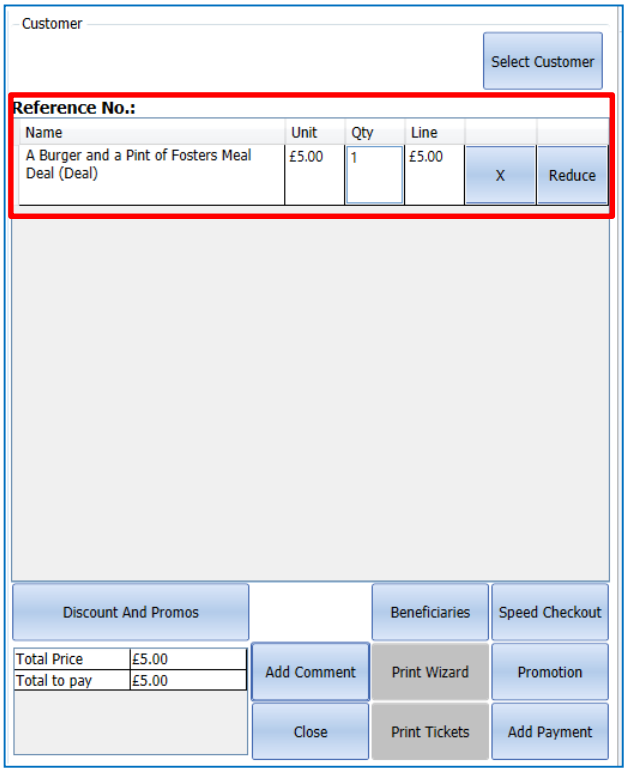
To view and purchase this type of Meal Deal complete the following:

a) Open up the POS, the food and beverage products you are selling will be displayed.



b) Select the Meal Deal previously created, in this example that being, a Burger and a pint of Fosters Meal Deal, as highlighted below. If the Meal Deal is being purchased more than once, repeat the selection of the button the number of times it is being purchased.

c) This will add the Meal Deal directly to the shopping cart area as the operator has no choice in selecting the specific products that are to be part of the Meal Deal.

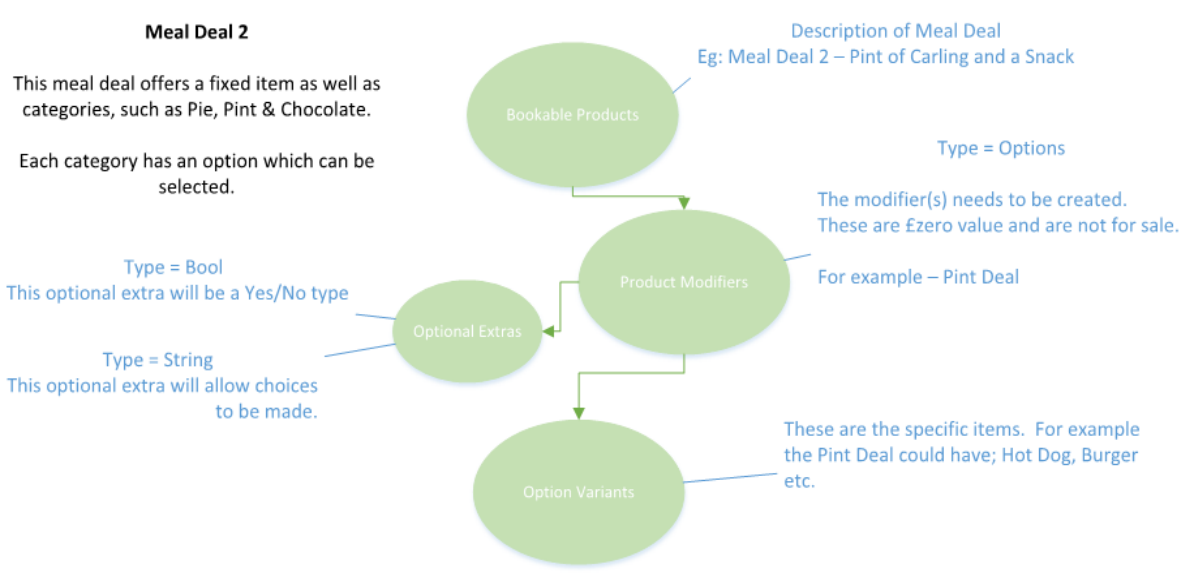


d) Select **Add Payment** to complete the purchase of the Meal Deal.

2.2. MEAL DEAL 2: CREATING A MEAL DEAL THAT CONSISTS OF A COMBINATION OF PRODUCTS WITH ANY VARIANTS AND PRODUCT SPECIFIC VARIANTS

This type of Meal Deal allows the deal to consist of a combination of products that can be chosen by the operator. For example a Meal Deal may consist of a pint of Carling with a choice of food to make up the deal. Therefore there may be a deal of a pint of Carling and a hot dog, a pint of Carling and a burger or a pint of Carling and a pie. For this type of Meal Deal to be created, the bookable product must have a Product Modifier and Option Variants attached to it.

The diagram below demonstrates how this type of Meal Deal can be created.



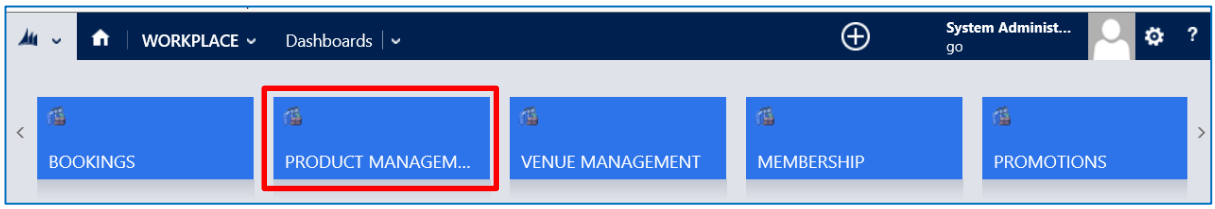
The Setup of the Meal Deal should already have been completed so that there is an appropriate Deal Variant Type, Variant Price List, Sales Plan and linked Channel Price List. If these have not been created, see Section 1 of this document.

STEP 1. CREATE THE MEAL DEALS BOOKABLE PRODUCT

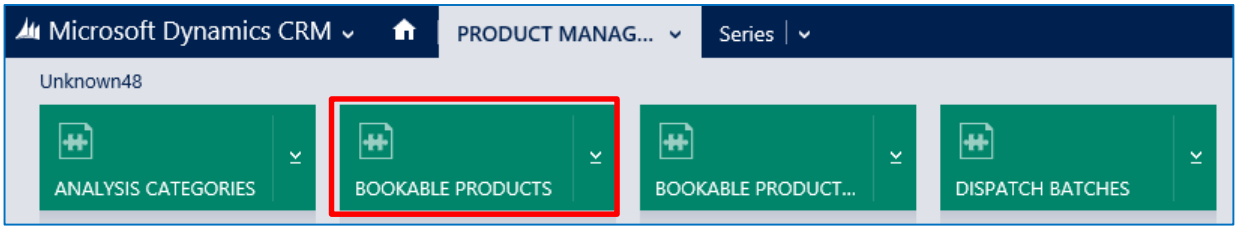
The Bookable Product entity is used to represent products that are sold, for example the Meal Deal. For each Meal Deal you are selling you must create a Bookable Product. In the example being used a Bookable Product of A pint of Carling with food Meal Deal has been created.

To do this, complete the following:

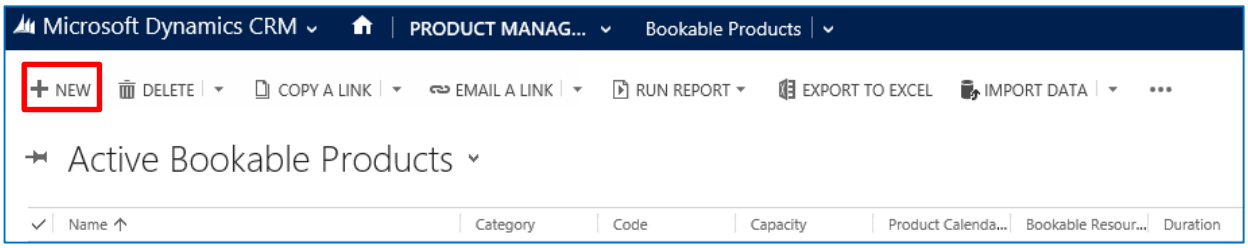
a) Select or hover over the **Microsoft Dynamics CRM** tab before scrolling across the drop down list of the navigation bar and selecting **Product Management**.



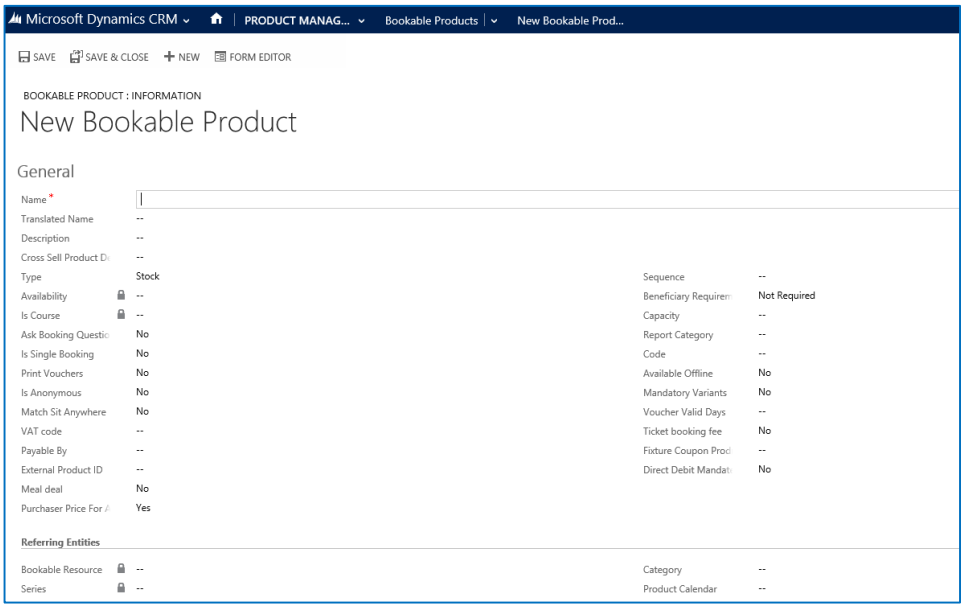
b) Next, in the Product Management area of CRM, select the **Product Management** tab before selecting **Bookable Products** from the drop down.



c) A list of the currently active Bookable Products will be displayed. Select **New** on the ribbon.



d) A blank Bookable Product form will be displayed. Complete the following:



General:

- **Name.** Enter a name for the product. The name will be visible to an operator and should therefore reflect the nature of the product. For example a Burger and a Pint of Fosters Meal Deal
- **Translated Name.** Used for translated implementations.
- **Description.** Enter a description of the product.
- **Type.** Use the drop-down list to select the type of product. In this instance select **Stock** from the list of available values.
- **Sequence.** If applicable, enter a sequence number for the product. The sequence number is used to determine the order in which products are displayed in the POS and Web channels.

- **Beneficiary Requirement.** Use the drop-down list to select if a customer's name is required when the product is purchased. For stock products this option should be set to **Not Required**.
- **Report Category.** Can be used for reporting purposes to categorise the products sold through Green 4 F&B.
- **Code.** Can be used to enter the barcode for products sold through the Green 4 F&B POS.
- **Is Anonymous.** Select **Yes** if the purchaser is not required to provide a name when buying the product. The channel must be set up to anonymous purchases also.
- **Available Offline.** Select **Yes** if the bookable product is to be available for purchase through the offline POS. This option cannot be used for products that require capacity to be monitored.
- **Meal deal.** Select **Yes**, to show that this is a Meal Deal product. This is then used for reporting purposes.

Referring Entities:

- **Category.** Use the Look Up Records dialog to select the product category. The category is used to group products, for example Meal Deals.

Note. All other fields in the Bookable Product form that have not been described above do not need to be completed/changed.

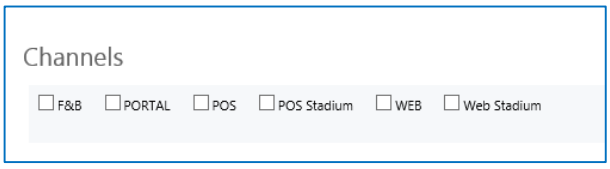
---

e) When the details are complete select **Save** on the ribbon.

f) Next, it is necessary to indicate which **Channels** the product can be bought. To set the Channels carry out the following:

i. Scroll down to the **Channels** section of the Bookable Product form

ii. The Channels that have been set up during the configuration on your system will be listed. Select the checkbox alongside each Channel through which the product will be sold.

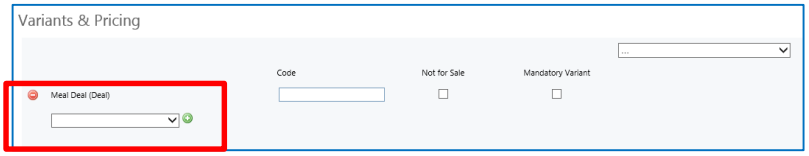


iii. Select **Save** on the ribbon.

g) Next, it is necessary to identify the Product Variants and Prices:

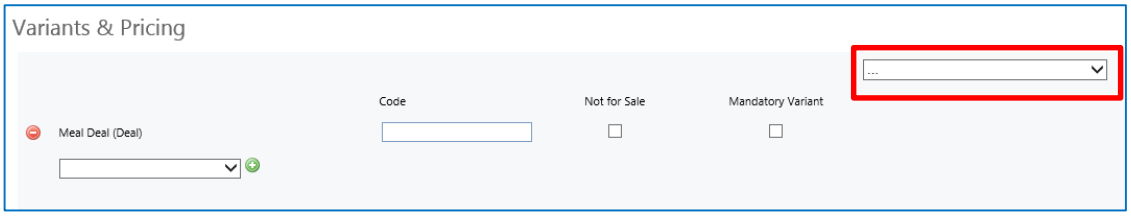
i. Scroll down to the **Variants & Pricing** section of the Bookable Product form.

ii. To select a **Variant**, in the drop-down list on the left hand side (highlighted below), select the appropriate option. All of the variants available in your system will be listed. If you have categorised the variants they will displayed in the relevant categories. For Meal Deals the Variant of **Deal** should be added.

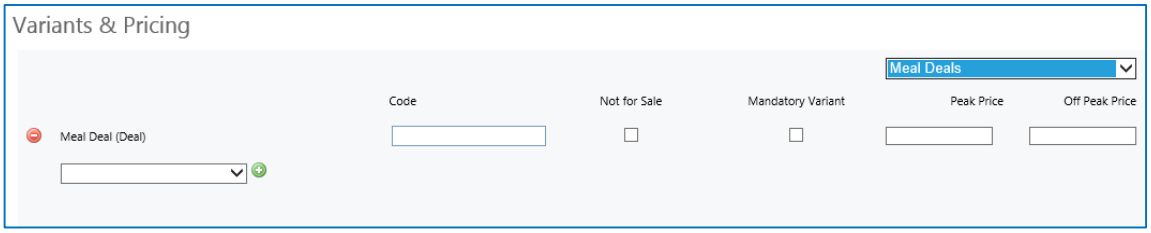


h) Next, the price of the product must be entered, to do this:

i. Select the relevant Meal Deal **Variant Price List** from the drop down at the right hand side of the Variants & Pricing section (highlighted below).



ii. Peak Price and Off Peak Price fields will appear upon selecting the appropriate Variant Price List. In both the Peak Price and Off Peak Pricing fields the same price information should be entered.



i) When the pricing details are complete select **Save** in the bottom right hand corner of the Bookable Product form.

EXAMPLE OF A BOOKABLE PRODUCT RECORD CREATED FOR STEP 1

The table below shows the mandatory areas that must be completed in a Bookable Product form for Step 1 to represent this configuration of a Meal Deal as a whole. The example below and information entered has been created for this document.

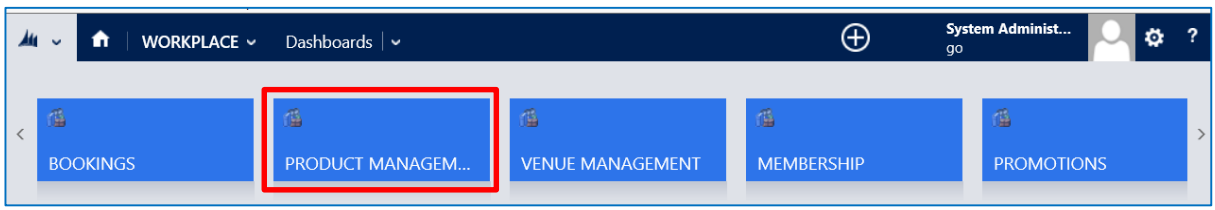
Record Created	Name	Type	Category	Channel	Variant Type	Variant Price List	Pricing
Bookable Product	A pint of Carling with food Meal Deal	Stock	Meal Deals	F&B	Deal	Meal Deals	5.00

STEP 2. CREATE BOOKABLE PRODUCTS THAT ARE TO BE PART OF THE MEAL DEAL

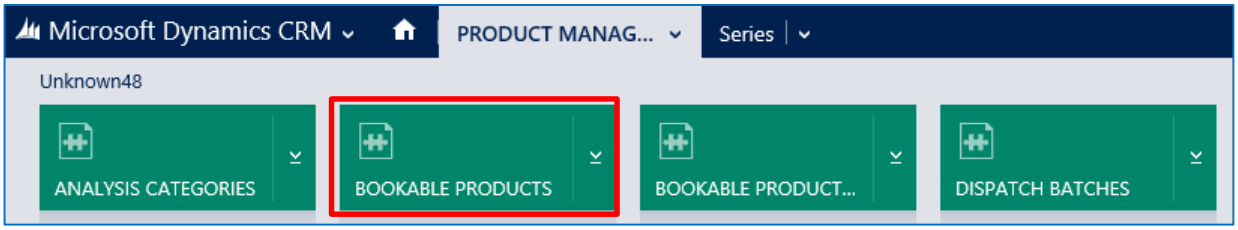
Next, the products that are to be part of the Meal Deal must be created. For example a Bookable Product must be created for the hot dog or pie etc.

To create the products that are to be part of the Meal Deal, complete the following:

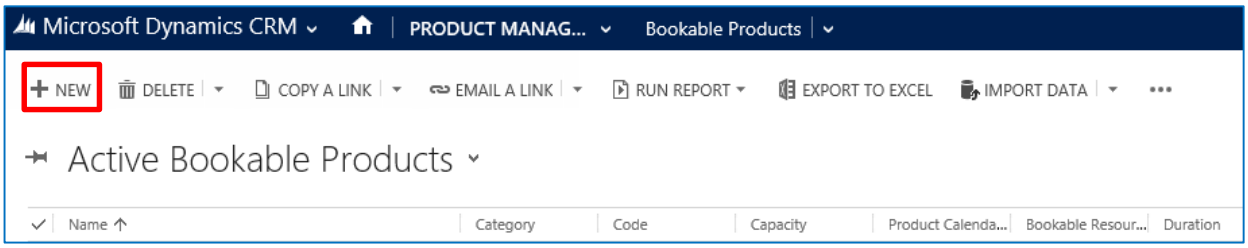
a) Select or hover over the **Microsoft Dynamics CRM** tab before scrolling across the drop down list of the navigation bar and selecting **Product Management**.



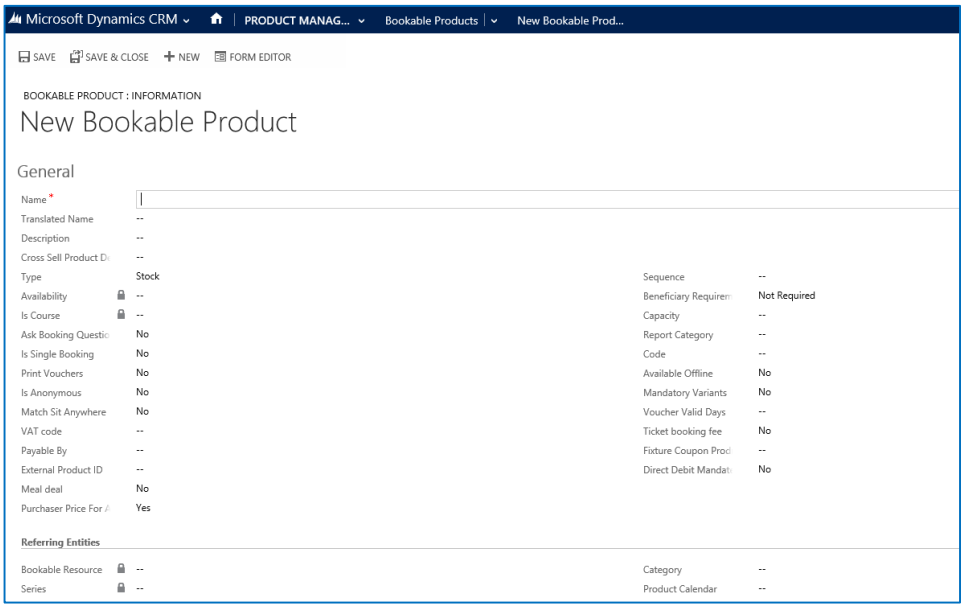
b) Next, in the Product Management area of CRM, select the **Product Management** tab before selecting **Bookable Products** from the drop down.



c) A list of the currently active Bookable Products will be displayed. Select **New** on the ribbon.



d) A blank Bookable Product form will be displayed. Complete the following:



General:

- **Name.** Enter a name for the product. The name will be visible to operator and should therefore reflect the nature of the product. For example, Burger or Hot Dog.
- **Translated Name.** Used for translated implementations.
- **Description.** Enter a description of the product.
- **Type.** Use the drop-down list to select the type of product. In this instance select **Stock** from the list of available values.
- **Sequence.** Enter a sequence number for the product. The sequence number is used to determine the order in which products are displayed in the POS and Web channels.
- **Beneficiary Requirement.** Use the drop-down list to select if a customer's name is required when the product is purchased. For stock products this option should be set to **Not Required**.

- **Report Category.** Can be used for reporting purposes to categorise the products sold through Green 4 F&B.
- **Code.** Can be used to enter the barcode for products sold through the Green 4 F&B POS.
- **Is Anonymous.** Select **Yes** if the purchaser is not required to provide a name when buying the product. The channel must be set up to anonymous purchases also.
- **Available Offline.** Select **Yes** if the bookable product is to be available for purchase through the offline POS. This option cannot be used for products which require capacity to be monitored.

Referring Entities:

- **Category.** Use the Look Up Records dialog to select the product category. The category is used to group products, for example Meal Deals, alcoholic drinks, soft drinks etc.

Note. All other fields in the Bookable Product form that have not been described above do not need to be completed/changed.

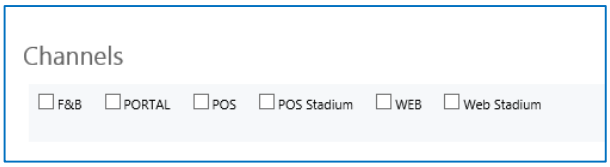
---

j) When the details are complete select **Save** on the ribbon.

k) Next, it is necessary to indicate which **Channels** the product can be bought. To set the Channels carry out the following:

i. Scroll down to the **Channels** section of the Bookable Product form

ii. The Channels that have been set up during the configuration on your system will be listed. Select the checkbox alongside each Channel through which the product will be sold.

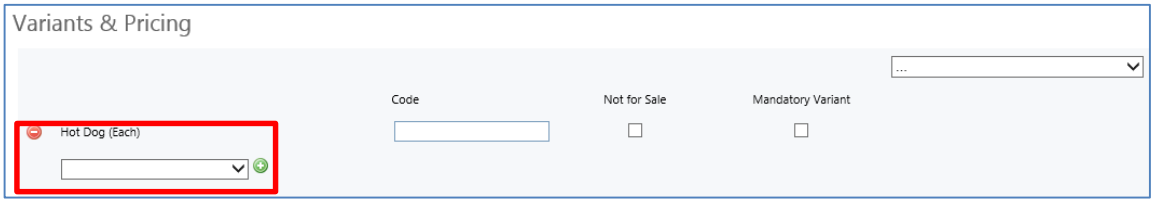


iii. Select **Save** on the ribbon.

l) Next, it is necessary to identify the Product Variants and Prices:

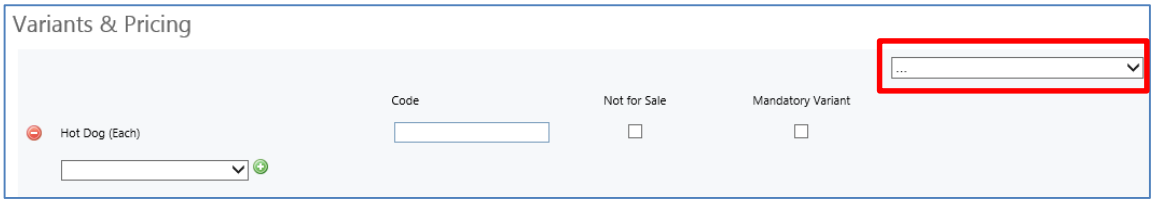
iii. Scroll down to the **Variants & Pricing** section of the Bookable Product form.

iv. To select a **Variant**, in the drop-down list on the left hand side (highlighted below), select the appropriate option. All of the variants available in your system will be listed. If you have categorised the variants they will displayed in the relevant categories. For a product that is to part of a Meal Deal, use the Variant Type of Each.



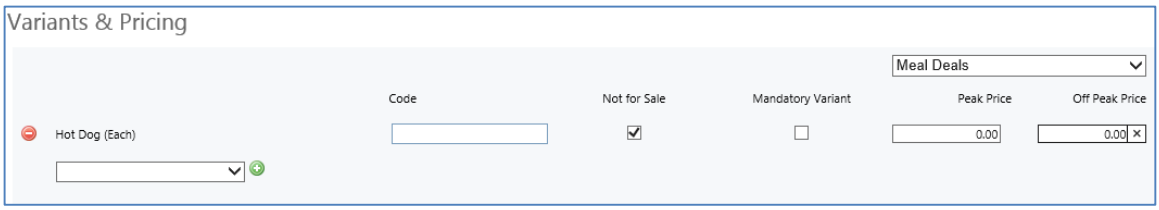
m) Next, the price of the product must be entered, to do this:

i. Select the relevant Meal Deal **Variant Price List** from the drop down at the right hand side of the Variants & Pricing section (highlighted below).



ii. The pricing value entered here should be the price £0.00 as the product is going to be part of a Meal Deal that already has a price associated to it.

iii. Additionally ensure that the **Not For Sale** flag in the Variant and Pricing section is ticked.



n) When the pricing details are complete select **Save & Close** on the ribbon to save the product, repeat this step until all products that are to be part of the Meal Deal have been created.

EXAMPLE OF A BOOKABLE PRODUCT RECORD CREATED FOR STEP 2

The table below shows the mandatory areas that must be completed in a Bookable Product form for Step 2 to represent the Meal Deal. The example below and information entered has been created for this document.

Record Created	Name	Type	Category	Channel	Variant Type	Variant Price List	Pricing
Bookable Product	Hot Dog	Stock	Meal Deals	F&B	Each	Meal Deals	0.00 (Not for Sale flag ticked)
Bookable Product	Pie	Stock	Meal Deals	F&B	Each	Meal Deals	0.00 (Not for Sale flag ticked)

STEP 3. CREATE A BOOKABLE PRODUCT TO LINK TO THE BOOKABLE PRODUCT MODIFIER

Another Bookable product must be created as shown in Step 2 but this time it will represent all of the products that can be added to the Meal Deal, and entered in the Bookable Product Modifier. In this example a bookable product called Carling Deal was created to represent the deal of a pint of Carling and Food.

As shown in Step 2 this Bookable Product must have:

- **Channels selected.** To represent the channel the product is to be available on.
- **Variants Selected.** Use the Variant type of **Deal** here.
- **Prices entered.** The price entered here should be **£0.00** and the flag **Not for Sale** must be ticked.

EXAMPLE OF A BOOKABLE PRODUCT RECORD CREATED FOR STEP 3

The table below shows the mandatory areas that must be completed in a Bookable Product form for Step 3 to represent the Bookable Product that is to be linked to the Bookable Product Modifier. The example below and information entered has been created for this document.

Record Created	Name	Type	Category	Channel	Variant Type	Variant Price List	Pricing
Bookable Product	Carling Deal	Stock	Meal Deals	F&B	Deal	Meal Deals	0.00 (Not for Sale flag ticked)

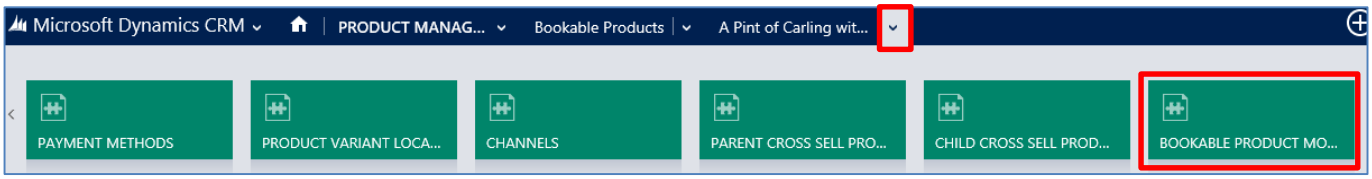
STEP 4. CREATE BOOKABLE PRODUCT MODIFIER

A Bookable Product Modifier must be created to link the Meal Deal Options, for example a burger or hot dog to the Meal Deal itself.

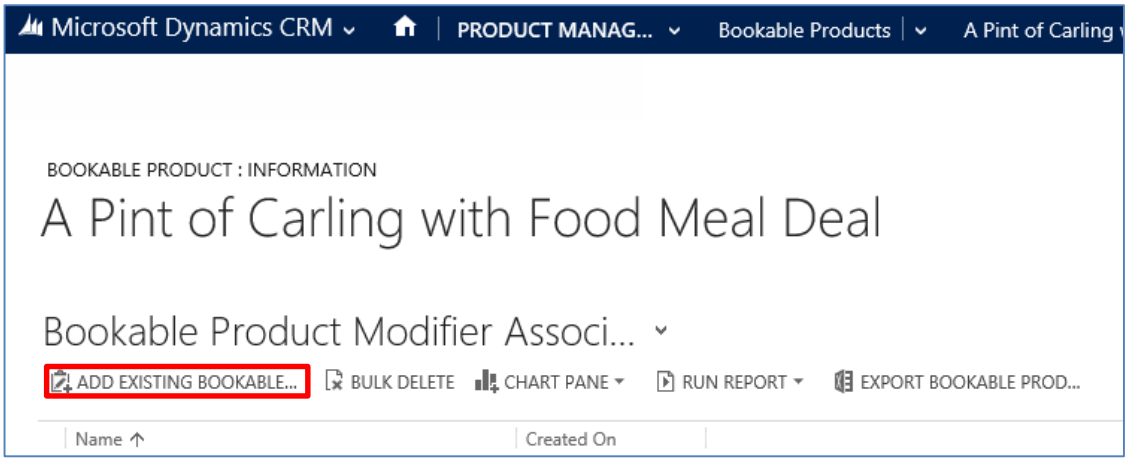
To do this, complete the following:

a) In the navigation bar select **Product Management** before selecting **Bookable Products from the drop down**, and open up the bookable product that is representing the Meal Deal, (this is the Bookable Product that was created in Step 1 of Section 2.2) In this example it would be a pint of Carling with Food Meal Deal Bookable Product.

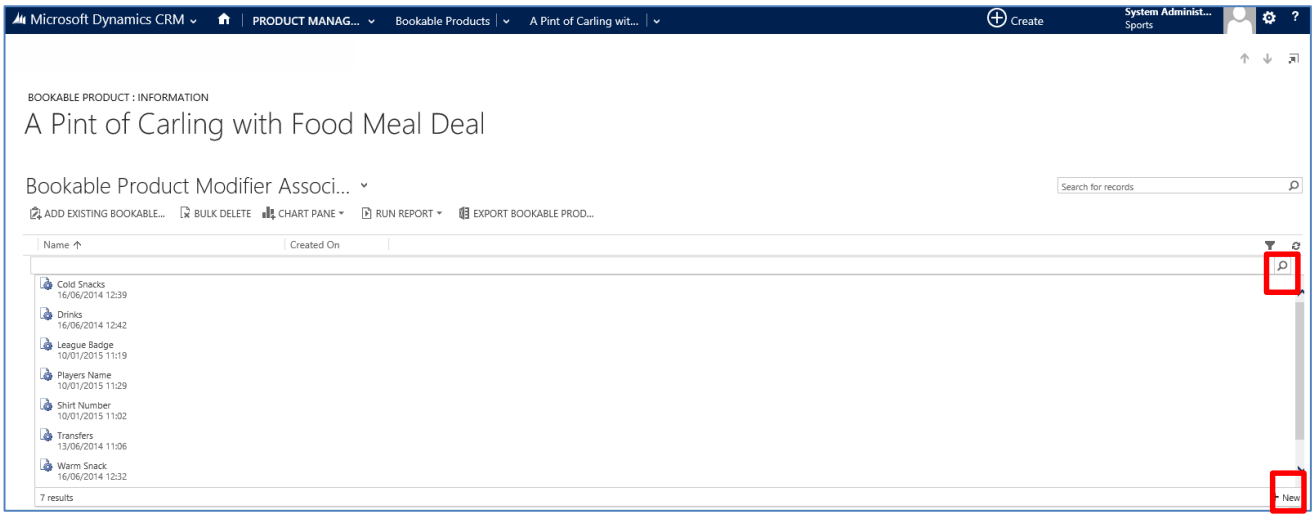
b) With the Bookable Product form open select the small arrow next to the name of the Meal Deal in the navigation bar, from the drop down scroll across and select **Bookable Product Modifiers**.



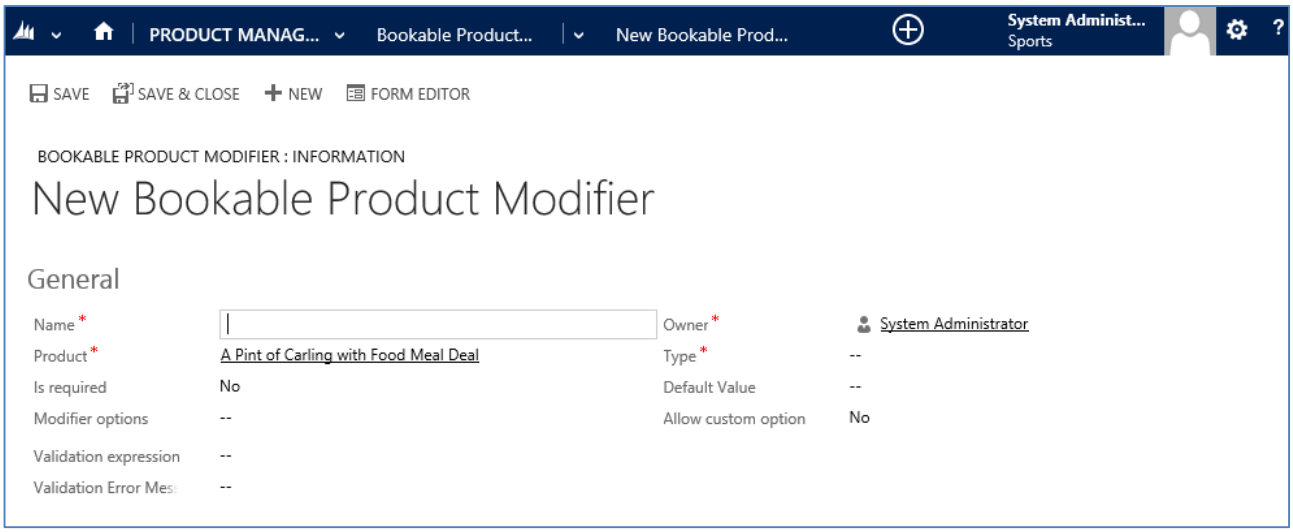
c) The Bookable Product Modifier Associated view will be displayed. Select **Add Existing Bookable Product Modifier** in the ribbon



d) A drop down will appear, select the magnifying glass icon and choose **New.**



e) This will open up a new Bookable Product Modifier form, complete the following:



- **Name**. Enter a name of the Bookable Product Modifier. In this example Carling Pint with food, has been used.
- **Product**. Use the magnifying glass to Look up to find the bookable product that was created in Step 3 of section 2.2. In this example it is Carling Deal.
- **Is required.** Select **No.**
- **Modifier option**. Leave this field blank.
- **Validation expression.** Leave this field blank.
- **Owner.** This field will already be completed.
- **Type.** Select **Options** from the drop down menu.
- **Default Value.** Leave this field blank.
- **Allow custom option.** Select **No.**

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

EXAMPLE OF A BOOKABLE PRODUCT MODIFIER RECORD CREATED FOR STEP 4

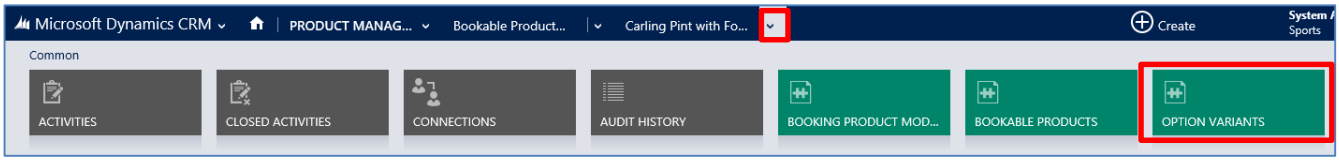
The table below shows the mandatory fields that must be completed in a Bookable Product Modifier form in Step 4. The example below and information entered has been created for this document.

Record Created	Name	Product	Is Required	Owner	Type	Allow custom option
Bookable Product Modifier	Carling Pint with Food	Carling Deal	No	System Administrator	Options	No

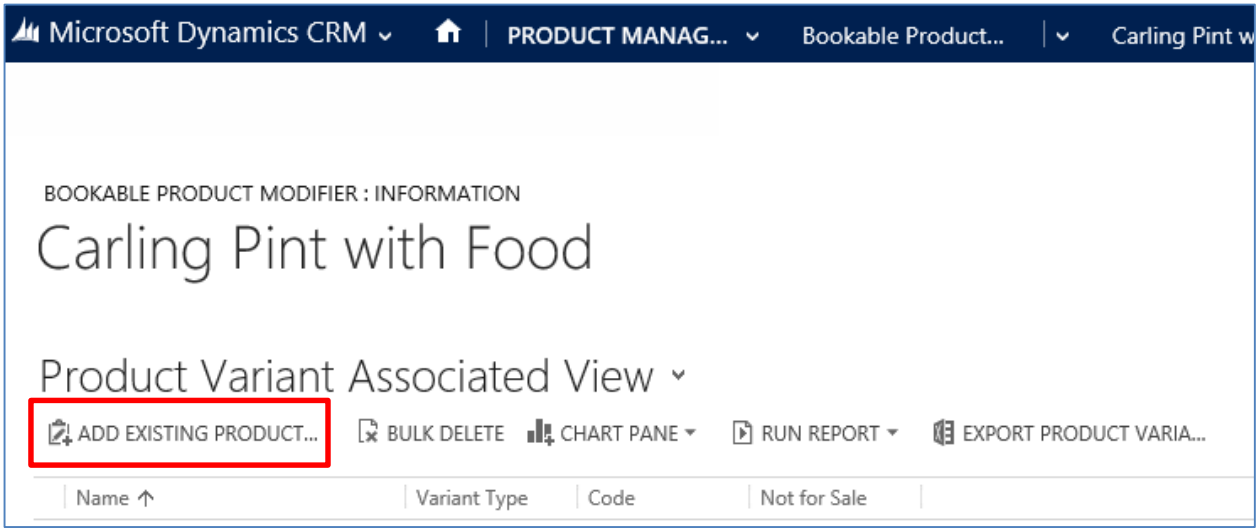
STEP 5. CREATE THE OPTION VARIANTS

The Option Variants link the products which are going to be offered as part of the Meal Deal to the Meal Deal itself. In this example these being the Pie and the Hotdog.

a) With the Product Modifier form still open, select the small arrow next to the name of the Product Modifier in the navigation bar and from the drop down choose **Option Variants**.

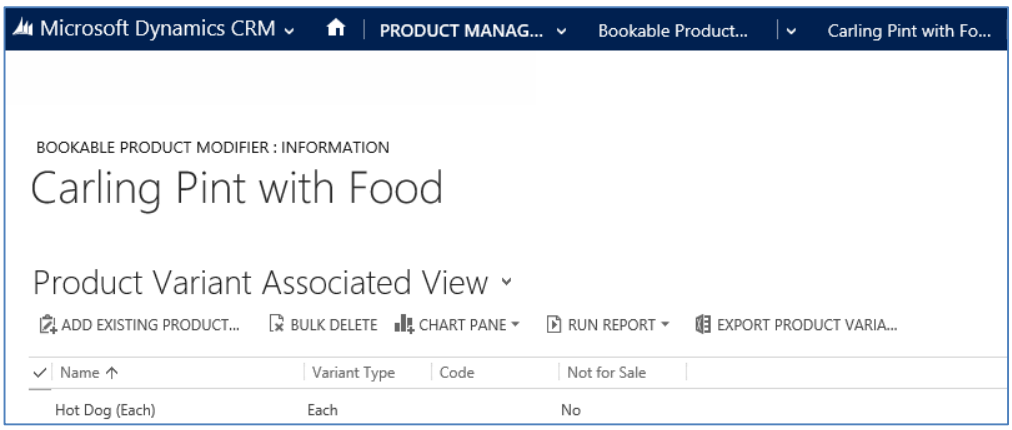


b) The Product Variant Associated View will be displayed, select **Add Existing Product Variant** in the ribbon.



c) A drop down will appear, use the magnifying glass to look up and find the Product Variants that are to be part of the Meal Deal and were previously created in Step 2 of section 2.2. In this example these being a hot dog and pie. If the products cannot be found choose the Look Up More Records from the drop down, this will display a new window to find the products.

d) The Product Variants will be shown in the Product Variant Associated View when they have been added. Upon adding all the Option Variants that will make up the Meal Deal, select the Save icon in the bottom right hand corner of the screen.



MEAL DEAL 2: OVERVIEW

Task	Completed?	Comments
1. Created the Deal Variant Type		Ensure that a Variant Type of Deal has been created in CRM 2015. This Variant Type will only need creating once within the system
2. Created Variant Price Lists		Ensure an active Variant Price List has been created. This is where Prices are defined in the Bookable Product form and is linked to the Channel Price List
3. Created a Channel Price List		The channel price list should be linked to the Sales Plan type of Other. The Channel Price List should link the Channels to the Variant Price List on which prices have been entered. Ensure the Channel Price List dates are valid. A Channel Price List will need to be created for each Variant Price List – Channel combination created.
4. Created the overall Meal Deal Bookable Product. i.e. A pint of Carling with food Meal Deal		Ensure the Bookable Product Type is set as **Stock** Ensure the Meal Deal flag is set to **Yes** Ensure a **Category** for example, Meal Deal, has been entered Ensure the relevant **Channel** check boxes are ticked Ensure the Variant Type (Deal) is listed Enter the price of the Meal Deal using an active Variant Price List that has been linked to a Channel Price List.

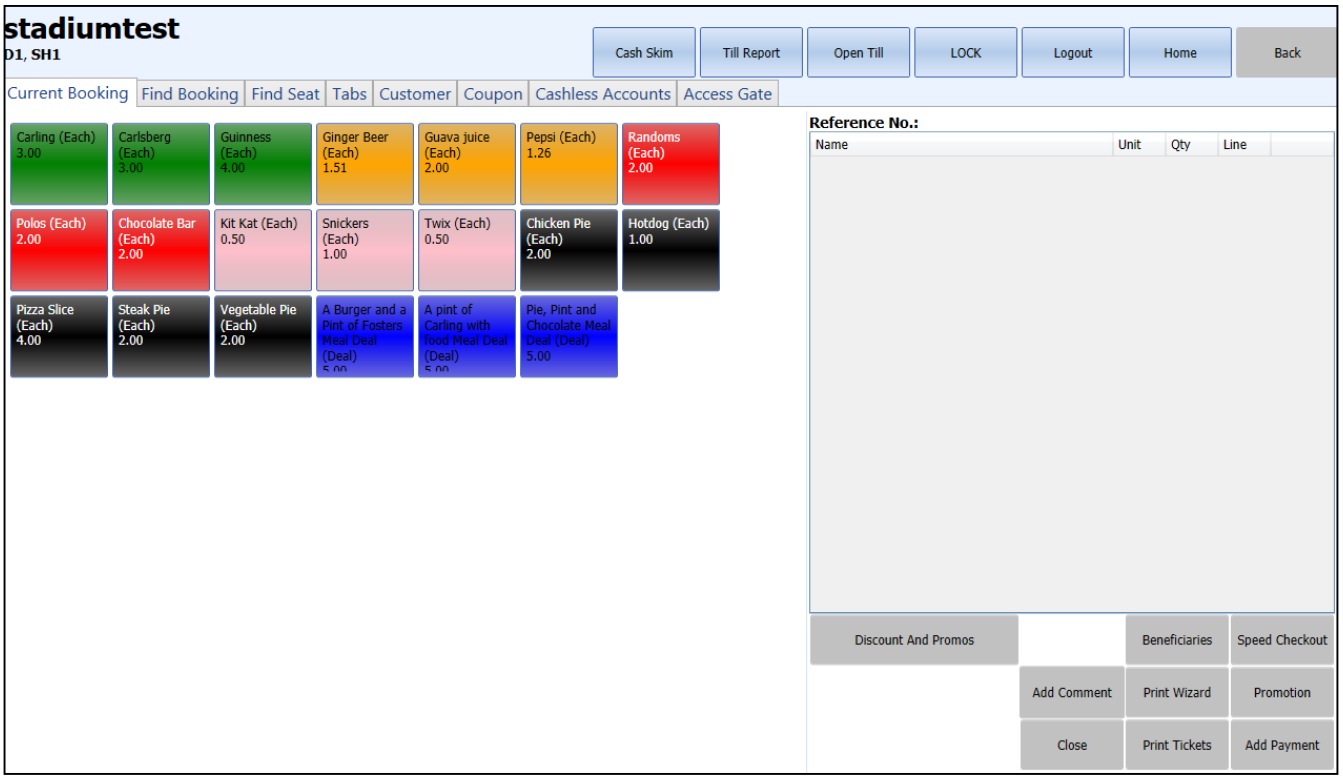
5. Created the Bookable Products that are to be part of the Meal Deal. i.e. The food that makes up the Meal Deal, for example Hot dog and pie		Ensure the Bookable Product Type is set as **Stock** Ensure a **Category**, for example Meal Deal, has been entered Ensure the relevant Channel check boxes are ticked Ensure the Variant Type (Each) is listed Ensure the price of the product entered is £0.00 and that an active Variant Price List has been linked to a Channel Price List. Tick the **Not for Sale flag** in the Variant and Pricing section
6. Created the Bookable Product to link to the Bookable Product Modifier. i.e. Carling Deal		Ensure the Bookable Product Type is set as **Stock** Ensure a **Category**, for example Meal Deal, has been entered. Ensure the relevant **Channel** check boxes are ticked Ensure the Variant Type (Deal) is listed Ensure the price of the product entered is **£0.00** and that an active Variant Price List has been linked to a Channel Price List. Tick the **Not for Sale** flag in the Variant and Pricing section
7. Created the Bookable Product Modifier to link the various Meal Deal options, for example a pie or hot dog, to the Meal Deal itself.		The **Is required** field must be set to **No** The **Type** field must be selected as **Options** The **Product** field should display the Bookable Product that was previously created to link to the Bookable Product Modifier. The **Allow Custom option** field must be set to **No**
8. Created the Option Variants that link the products that are going to be offered as part of the Meal Deal to the Meal Deal itself		Add the products that are going to be offered as part of the Meal Deal, for example a pie, hot dog etc.

MEAL DEAL 2 IN THE POS

Upon completion of setting up this type of Meal Deal within CRM (in this example a Pint of Carling with food Meal Deal) it will be displayed in the POS. Please note that the Meal Deals in this example are coloured in blue, as this is the colour selected for the Category type of Meal Deal.

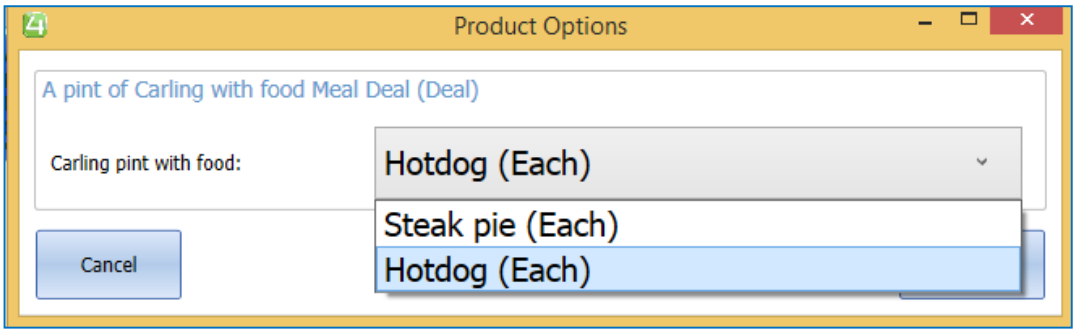
To view and purchase this type of Meal Deal complete the following:

a) Open up the POS, the food and beverage products you are selling will be displayed.

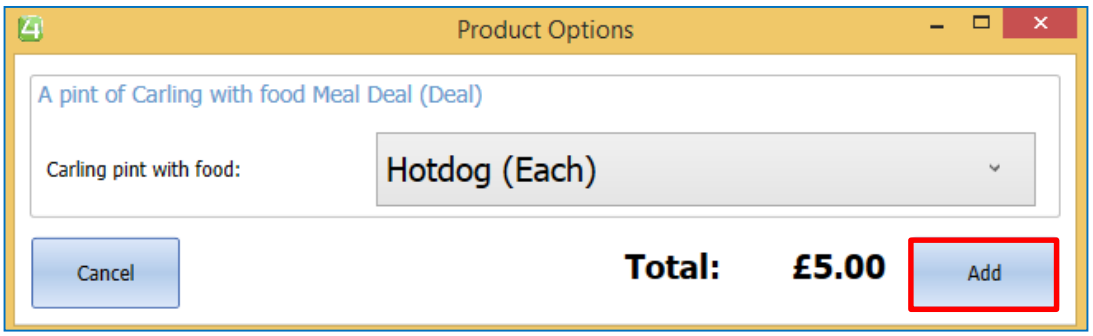


b) Select the Meal Deal you have previously created, in this example it is a pint of Carling with food Meal Deal, as highlighted below.

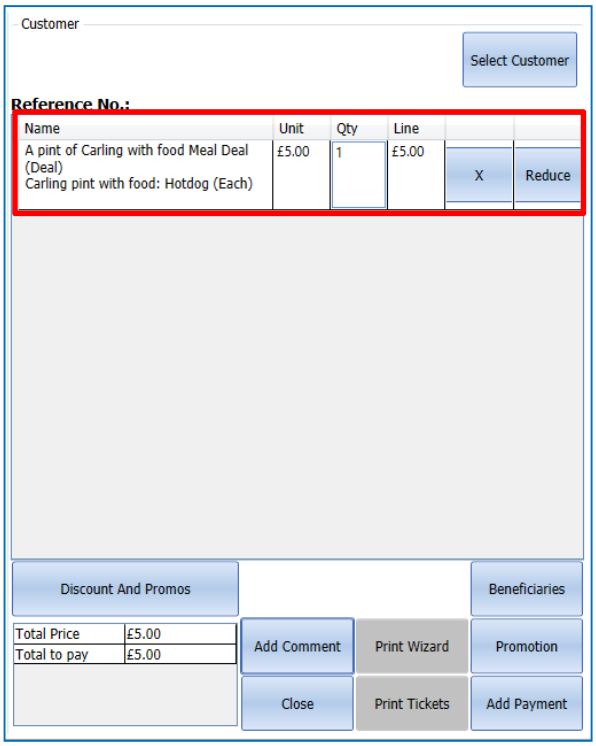
c) A Product Options dialogue will be displayed. Select the drop down to display the Option variants that were created and which can then be chosen to be part of the Meal Deal. In this example the Option Variants are hotdog and steak pie.



d) Upon selecting the option, choose **Add** to add the chosen Meal Deal to the shopping cart.

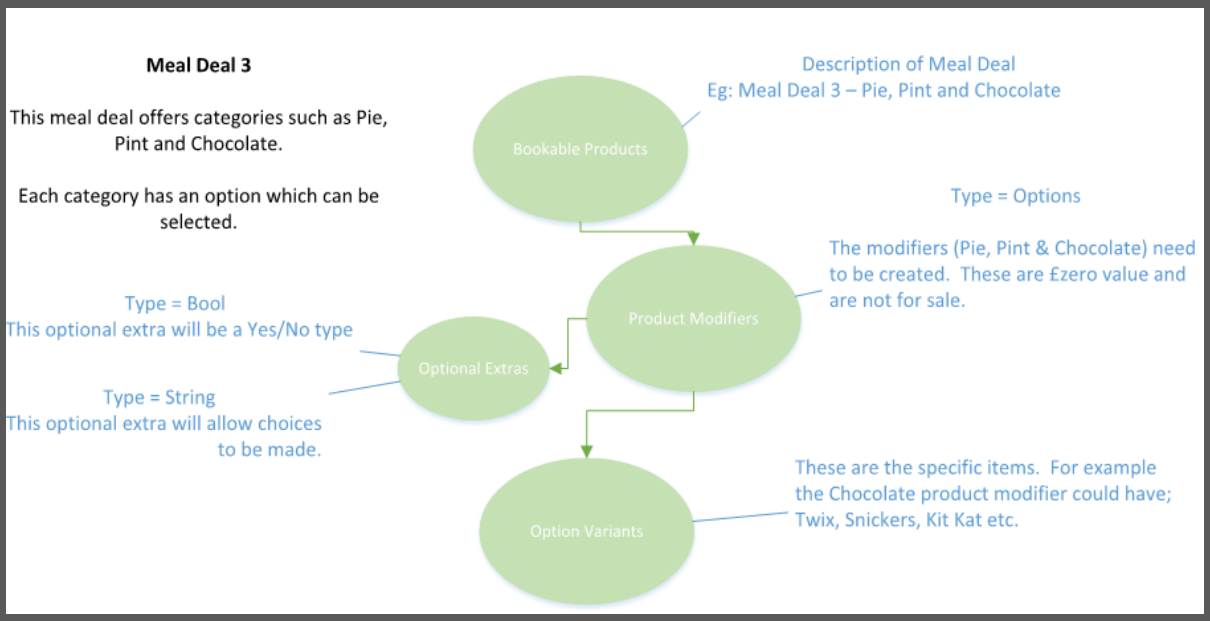


e) The Meal Deal will appear in the shopping cart area as is displayed below. Select **Add Payment** to complete the purchase.



2.3. MEAL DEAL 3. CREATING A MEAL DEAL THAT CONSISTS OF PRODUCTS AND SPECIFIC VARIANTS OF ALL PRODUCTS

This type of Meal Deal allows the deal to consist of a combination of products which can be chosen by the operator as well as specific types of these products. It may be that the Meal Deal for a pint, a pie and a chocolate bar is set up, and the end customer will be able to choose what each component consists of. For example, a pie could be chicken, steak or vegetable; a pint could be a Fosters, Carlsberg or Guinness and a chocolate bar could be a Kit Kat, Twix or Mars Bar. The diagram below shows how this type of Meal Deal can be created.



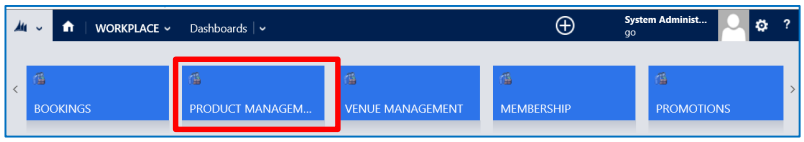
The Setup of the Meal Deal should already have been completed so that there is an appropriate Deal Variant Type, Variant Price List, Sales Plan and linked Channel Price List. If these have not been created, see Section 1 of this document.

STEP 1. CREATE THE MEAL DEALS BOOKABLE PRODUCT

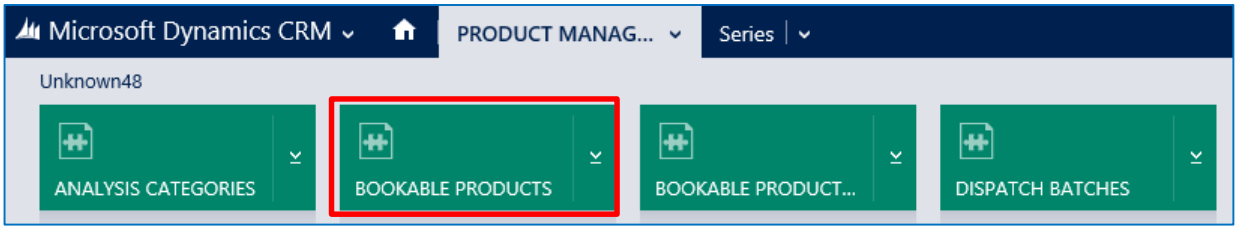
The Bookable Product entity is used to represent products that are sold, in this instance the Meal Deal itself. For each Meal Deal that you are selling through the system you must create a Bookable Product. In the example being used a Bookable Product of a Pie, Pint and Chocolate Meal Deal has been created.

To do this, complete the following:

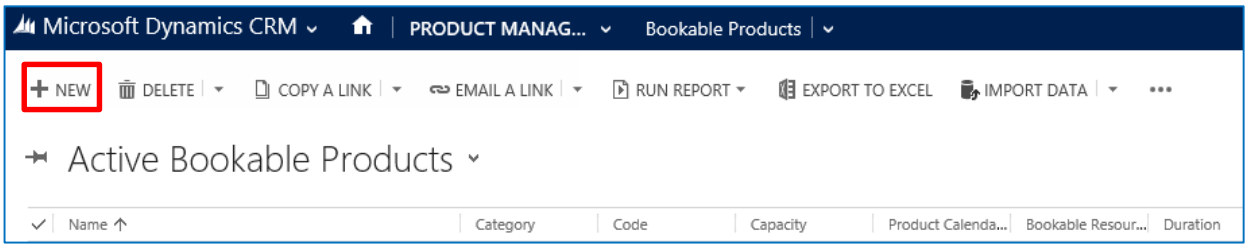
a) Select or hover over the **Microsoft Dynamics CRM** tab before scrolling across the drop down list of the navigation bar and selecting **Product Management**.



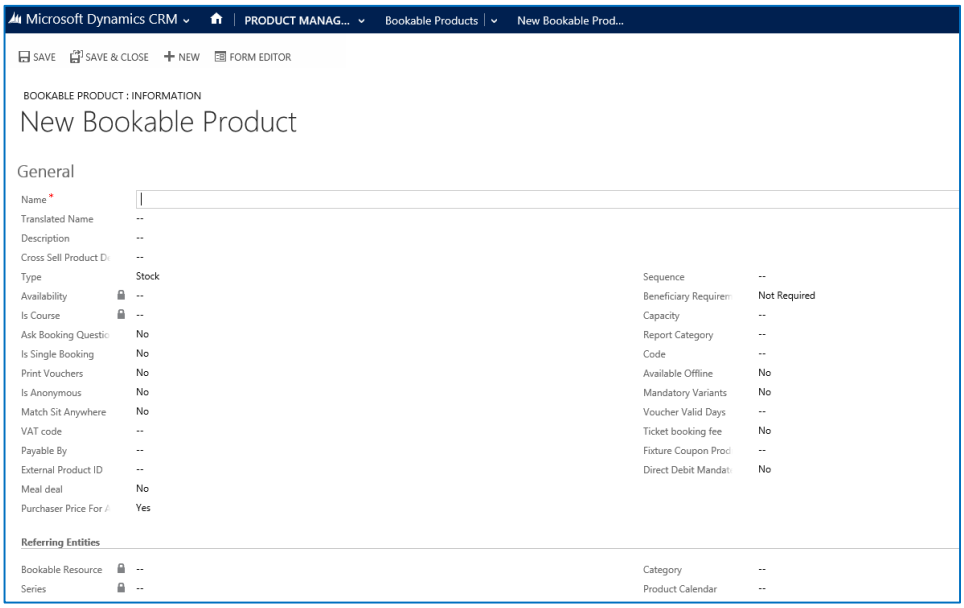
b) Next, in the Product Management area of CRM, select the **Product Management** tab before selecting **Bookable Products** from the drop down.



c) A list of the currently active Bookable Products will be displayed. Select **New** on the ribbon.



d) A blank Bookable Product form will be displayed. Complete the following:



General:

- **Name.** Enter a name for the product. The name will be visible to an operator and should therefore reflect the nature of the product. For example A Pie, Pint and Chocolate Meal Deal.
- **Translated Name.** This field can be used for translated implementations if applicable.
- **Description.** Enter a description of the product.
- **Type.** Use the drop-down list to select the type of product. In this instance select **Stock** from the list of available values.
- **Sequence.** If applicable, enter a sequence number for the product. The sequence number is used to determine the order in which products are displayed in the POS and Web channels.

- **Beneficiary Requirement.** Use the drop-down list to select if a customer's name is required when the product is purchased. For stock products this option should be set to **Not Required**.
- **Report Category.** Can be used for reporting purposes to categorise the products sold through Green 4 F&B.
- **Code.** Can be used to enter the barcode for products sold through the Green 4 F&B POS.
- **Is Anonymous.** Select **Yes** if the purchaser is not required to provide a name when buying the product. The channel must be set up to anonymous purchases also.
- **Available Offline.** Select **Yes** if the bookable product is to be available for purchase through the offline POS. This option cannot be used for products that require capacity to be monitored.
- **Meal Deal.** Select **Yes**, to show that this is a Meal Deal product. This is then used for reporting purposes.

Referring Entities:

- **Category.** Use the Look Up Records dialog to select the product category. The category is used to group products, for example Meal Deals, alcoholic drinks, soft drinks etc.

Note. All other fields in the Bookable Product form that have not been described above do not need to be completed/changed.

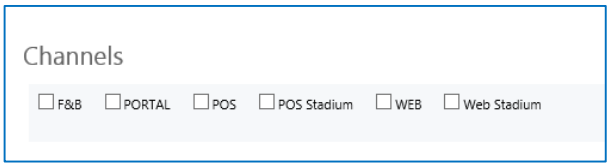
---

e) When the details are complete select **Save** on the ribbon.

f) Next, it is necessary to indicate which **Channels** the product can be bought. To set the Channels carry out the following:

i. Scroll down to the **Channels** section of the Bookable Product form

ii. The Channels that have been set up during the configuration on your system will be listed. Select the checkbox alongside each Channel through which the product will be sold.

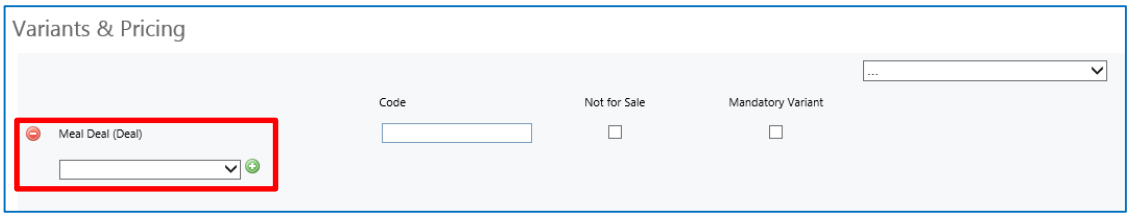


iii. Select **Save** on the ribbon.

g) Next, it is necessary to identify the Product Variants and Prices:

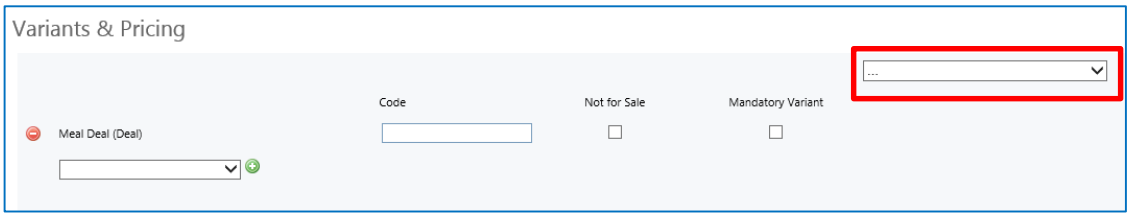
i. Scroll down to the **Variants & Pricing** section of the Bookable Product form.

ii. To select a **Variant**, in the drop-down list on the left hand side (highlighted below), select the appropriate option. All of the variants available in your system will be listed. If you have categorised the variants they will displayed in the relevant categories. For Meal Deals the Variant of **Deal** should be added.

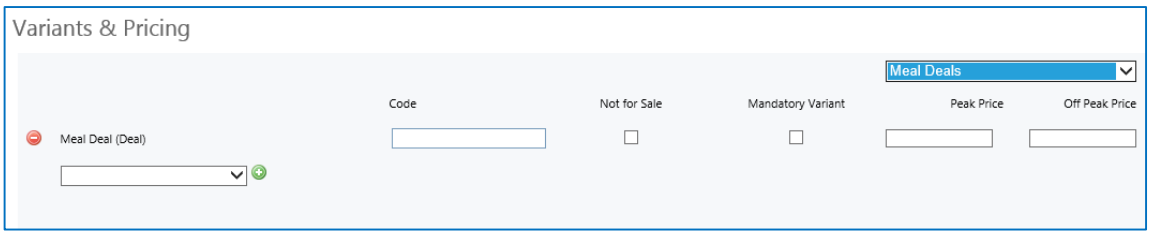


h) Next, the price of the product must be entered, to do this:

i. Select the relevant Meal Deal **Variant Price List** from the drop down at the right hand side of the Variants & Pricing section (highlighted below).



ii. Peak Price and Off Peak Price fields will appear upon selecting the appropriate Variant Price List. In both the Peak Price and Off Peak Pricing fields the same price information should be entered.



i) When the pricing details are complete select **Save** in the bottom right hand corner of the Bookable Product form.

EXAMPLE OF A BOOKABLE PRODUCT RECORD CREATED FOR STEP 1

The table below shows the mandatory areas that must be completed in a Bookable Product form for Step 1 to represent this configuration of a Meal Deal as a whole. The example below and information entered has been created to show for this document.

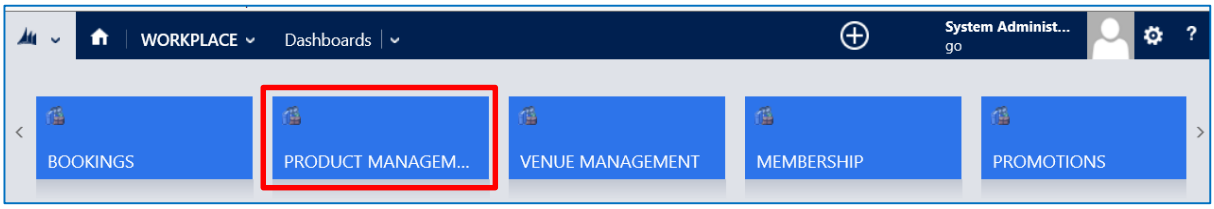
Record Created	Name	Type	Category	Channel	Variant Type	Variant Price List	Pricing
Bookable Product	Pie, Pint and Chocolate Meal Deal	Stock	Meal Deals	F&B	Deal	Meal Deals	5.00

STEP 2. CREATE BOOKABLE PRODUCTS THAT ARE TO BE PART OF THE MEAL DEAL

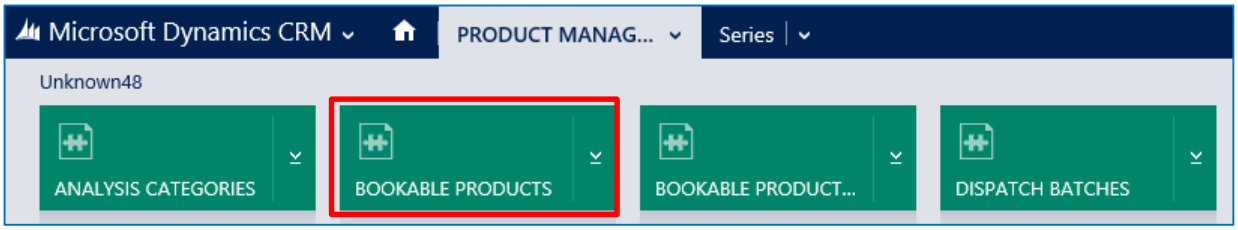
Next, the products which form part of the Meal Deal must be created. For example a Bookable Product must be created for the pie, pint and chocolate that are to be part of the Pie, Pint and Chocolate Meal Deal in this example.

To create the products that are to be part of the Meal Deal, complete the following:

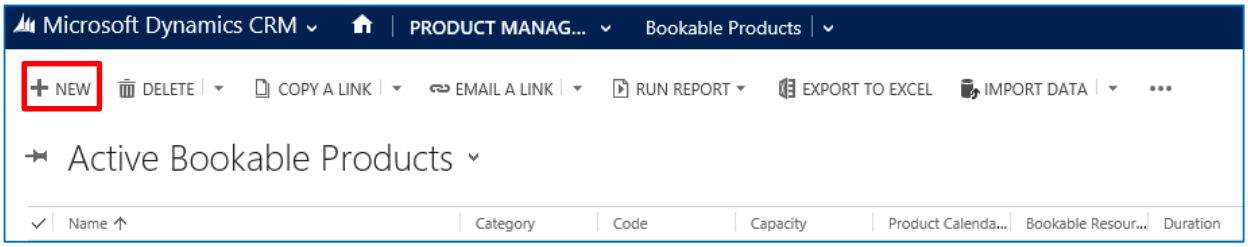
a) Select or hover over the **Microsoft Dynamics CRM** tab before scrolling across the drop down list of the navigation bar and selecting **Product Management**.



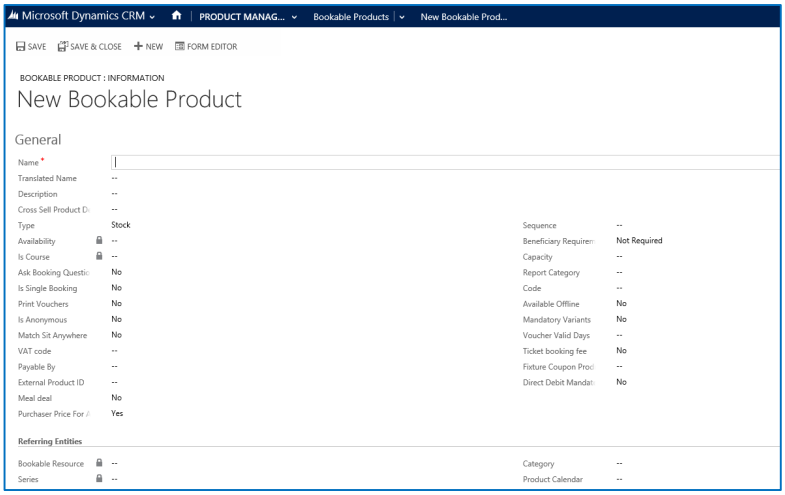
b) Next, in the Product Management area of CRM, select the **Product Management** tab before selecting **Bookable Products** from the drop down.



c) A list of the currently active Bookable Products will be displayed. Select **New** on the ribbon.



d) A blank Bookable Product form will be displayed. Complete the following:



General:

- **Name.** Enter a name for the product. The name will be visible to an operator and should therefore reflect the nature of the product. For example, Burger or Hot Dog.
- **Translated Name.** Used for translated implementations.
- **Description.** Enter a description of the product.
- **Type.** Use the drop-down list to select the type of product. In this instance select **Stock** from the list of available values.
- **Sequence.** Enter a sequence number for the product. The sequence number is used to determine the order in which products are displayed in the POS and Web channels.
- **Beneficiary Requirement.** Use the drop-down list to select if a customer's name is required when the product is purchased. For stock products this option should be set to **Not Required**.
- **Report Category.** Can be used for reporting purposes to categorise the products sold through Green 4 F&B.
- **Code.** Can be used to enter the barcode for products sold through the Green 4 F&B POS.
- **Is Anonymous.** Select **Yes** if the purchaser is not required to provide a name when buying the product. The channel must be set up to anonymous purchases also.
- **Available Offline.** Select **Yes** if the bookable product is to be available for purchase through the offline POS. This option cannot be used for products which require capacity to be monitored.

Referring Entities:

- **Category.** Use the Look Up Records dialog to select the product category. The category is used to group products, for example Meal Deals, alcoholic drinks, soft drinks etc.

Note. All other fields in the Bookable Product form that have not been described above do not need to be completed/changed.

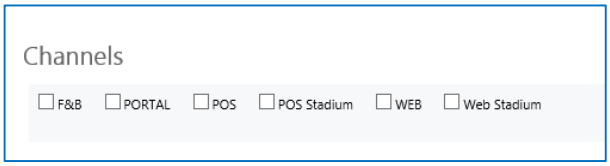
---

e) When the details are complete select **Save** on the ribbon.

f) Next, it is necessary to indicate which **Channels** the product can be bought. To set the Channels carry out the following:

i. Scroll down to the **Channels** section of the Bookable Product form

ii. The Channels that have been set up during the configuration on your system will be listed. Select the checkbox alongside each Channel through which the product will be sold.

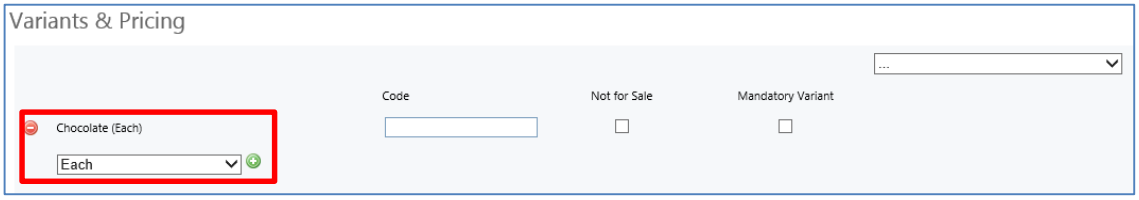


iii. Select **Save** on the ribbon.

g) Next, it is necessary to identify the Product Variants and Prices:

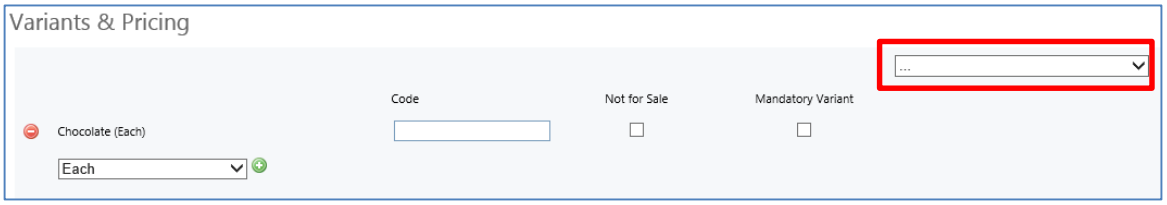
i. Scroll down to the **Variants & Pricing** section of the Bookable Product form.

ii. To select a **Variant,** in the drop-down list on the left hand side (highlighted below), select the appropriate option. All of the variants available in your system will be listed. If you have categorised the variants they will displayed in the relevant categories. For a product that is to part of a Meal Deal, use the Variant Type of Each.



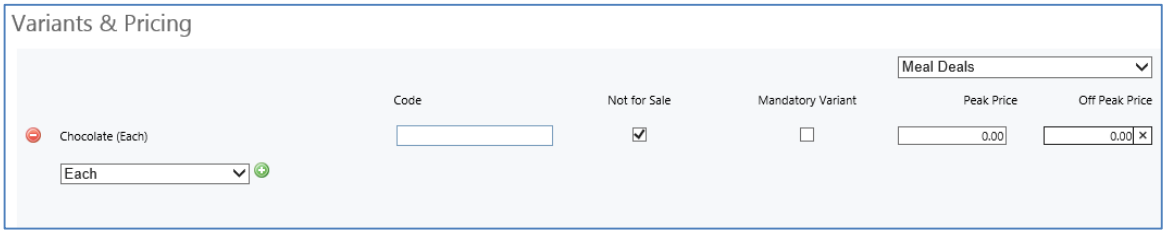
h) Next, the price of the product must be entered, to do this:

i. Select the relevant Meal Deal **Variant Price List** from the drop down at the right hand side of the Variants & Pricing section (highlighted below).



ii. The pricing value entered here should be the price **£0.00** as the product is going to be part of a Meal Deal that already has a price associated to it.

iii. Additionally ensure that the **Not For Sale** flag in the Variant and Pricing section is ticked.



i) When the pricing details are complete select **Save & Close** on the ribbon to save the product, repeat this step until all products that are to be part of the Meal Deal have been created.

EXAMPLE OF A BOOKABLE PRODUCT RECORDS CREATED FOR STEP 2

The table below shows the mandatory areas that must be completed in a Bookable Product form for Step 2 to represent the Meal Deal. The example below and information entered has been created for this document.

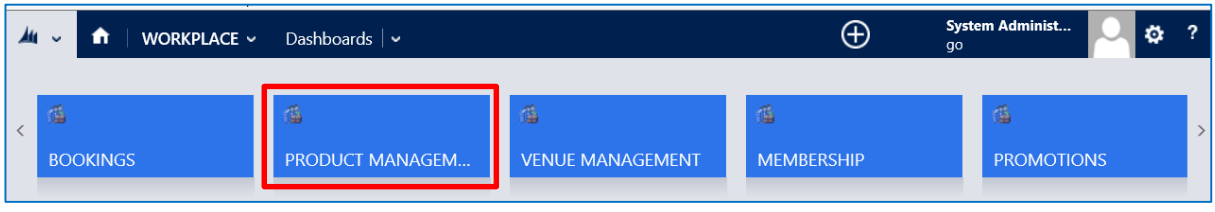
Record Created	Name	Type	Category	Channel	Variant Type	Variant Price List	Pricing
Bookable Product	Chocolate	Stock	Meal Deals	F&B	Each	Meal Deals	0.00 (Not for Sale flag ticked)
Bookable Product	Pie	Stock	Meal Deals	F&B	Each	Meal Deals	0.00 (Not for Sale flag ticked)
Bookable Product	Pint	Stock	Meal Deals	F&B	Each	Meal Deals	0.00 (Not for Sale flag ticked)

STEP 3. CREATE THE BOOKABLE PRODUCTS TYPES

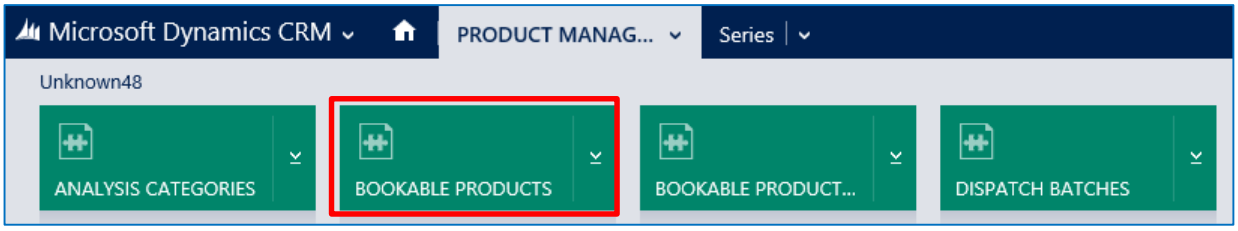
Next a Bookable Product must be created to represent each type of the product that is going to be included in the Meal Deal. For example, although a Bookable Product has been made to represent the product as a whole, e.g. Chocolate, Pie and Pint, the specific types of these also need creating. Therefore in this example the different types of chocolate bars (Twix, Snickers, and Kit Kat), Pints (Fosters, Carlsberg, Guinness) and Pies (steak, chicken, vegetable) will all need creating as separate bookable products.

If the different types of products (i.e. chicken pie, vegetable pie, steak pie) do not already exist on your system, complete the following, however if they do skip to Step 4.

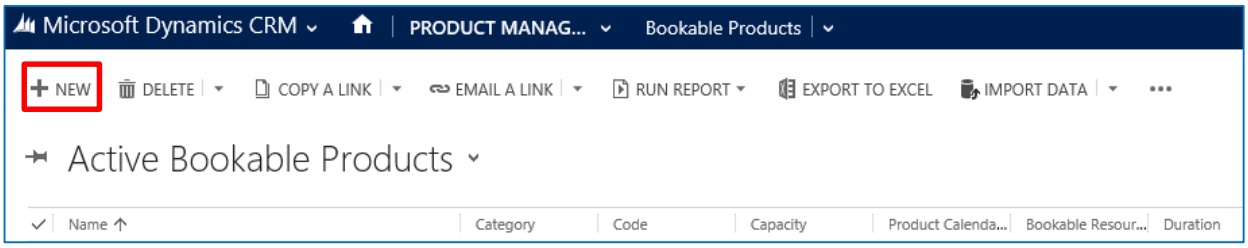
a) Select or hover over the **Microsoft Dynamics CRM** tab before scrolling across the drop down list of the navigation bar and selecting **Product Management**.



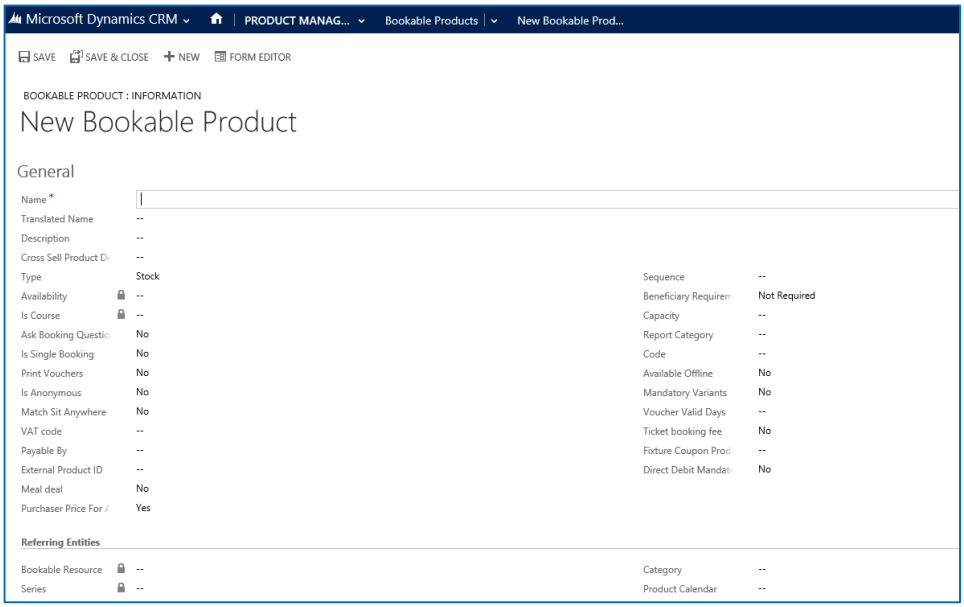
b) Next, in the Product Management area of CRM, select the **Product Management** tab before selecting **Bookable Products** from the drop down.



c) A list of the currently active Bookable Products will be displayed. Select **New** on the ribbon.



d) A blank Bookable Product form will be displayed. Complete the following:



General:

- **Name.** Enter a name for the product. The name will be visible to an operator and should therefore reflect the nature of the product. For example, Burger or Hot Dog.
- **Translated Name.** Used for translated implementations.
- **Description.** Enter a description of the product.
- **Type.** Use the drop-down list to select the type of product. In this instance select **Stock** from the list of available values.
- **Sequence.** Enter a sequence number for the product. The sequence number is used to determine the order in which products are displayed in the POS and Web channels.
- **Beneficiary Requirement.** Use the drop-down list to select if a customer's name is required when the product is purchased. For stock products this option should be set to **Not Required**.
- **Report Category.** Can be used for reporting purposes to categorise the products sold through Green 4 F&B.
- **Code.** Can be used to enter the barcode for products sold through the Green 4 F&B POS.
- **Is Anonymous.** Select **Yes** if the purchaser is not required to provide a name when buying the product. The channel must be set up to anonymous purchases also.
- **Available Offline.** Select **Yes** if the bookable product is to be available for purchase through the offline POS. This option cannot be used for products that require capacity to be monitored.

Referring Entities:

- **Category.** Use the Look Up Records dialog to select the product category. The category is used to group products, for example Meal Deals, alcoholic drinks, soft drinks etc.

Note. All other fields in the Bookable Product form that have not been described above do not need to be completed/changed.

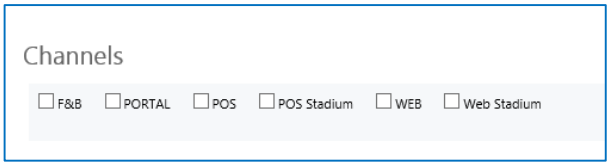
---

e) When the details are complete select **Save** on the ribbon.

f) Next, it is necessary to indicate which **Channels** the product can be bought. To set the Channels carry out the following:

i. Scroll down to the **Channels** section of the Bookable Product form

ii. The Channels that have been set up during the configuration on your system will be listed. Select the checkbox alongside each Channel through which the product will be sold.

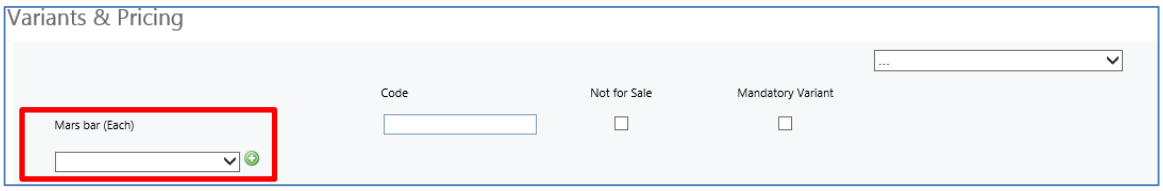


iii. Select **Save** on the ribbon.

g) Next, it is necessary to identify the Product Variants and Prices:

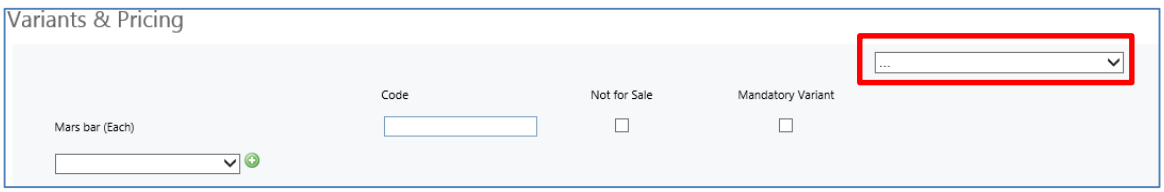
i. Scroll down to the **Variants & Pricing** section of the Bookable Product form.

ii. To select a **Variant**, in the drop-down list on the left hand side (highlighted below), select the appropriate option. All of the variants available in your system will be listed. If you have categorised the variants they will displayed in the relevant categories. For a product that is to part of a Meal Deal, use the Variant Type of Each.

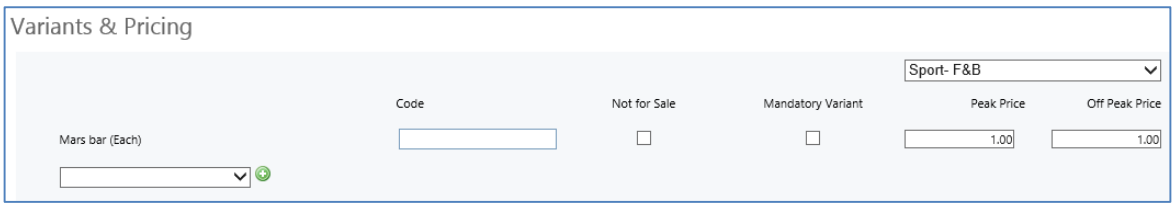


h) Next, the price of the product must be entered, to do this:

i. Select the relevant **Variant Price List** from the drop down at the right hand side of the Variants & Pricing section (highlighted below).



ii. If the product can also be sold separately you must enter price information for the individual price of the product on its own, select the relevant price list from the drop down at the top of the Variants & Pricing section.



i) Select **Save and Close** on the ribbon. Repeat the above process for each of the product types that are to be part of the Meal Deal, for example a Kit Kat, Mars Bar, Dairy Milk etc.

EXAMPLE OF A BOOKABLE PRODUCT RECORD CREATED FOR STEP 3

The table below shows specific types of Chocolate, Pies and Pints that have been created as Bookable Products and the mandatory areas that must be completed within the forms. The examples below and information entered has been created for this document.

Record Created	Name	Type	Category	Channel	Variant Type	Variant Price List	Pricing
Bookable Product	Mars Bar	Stock	Cold Snacks	F&B	Each	F&B	1.00
Bookable Product	Kit Kat	Stock	Cold Snacks	F&B	Each	F&B	1.00
Bookable Product	Twix	Stock	Cold Snacks	F&B	Each	F&B	1.00
Bookable Product	Chicken Pie	Stock	Warm Food	F&B	Each	F&B	3.50
Bookable Product	Steak Pie	Stock	Warm Food	F&B	Each	F&B	3.50
Bookable Product	Vegetable Pie	Stock	Warm Food	F&B	Each	F&B	3.50
Bookable Product	Carlsberg	Stock	Drink	F&B	Each	F&B	3.20
Bookable Product	Fosters	Stock	Drink	F&B	Each	F&B	3.20
Bookable Product	Guinness	Stock	Drink	F&B	Each	F&B	3.20

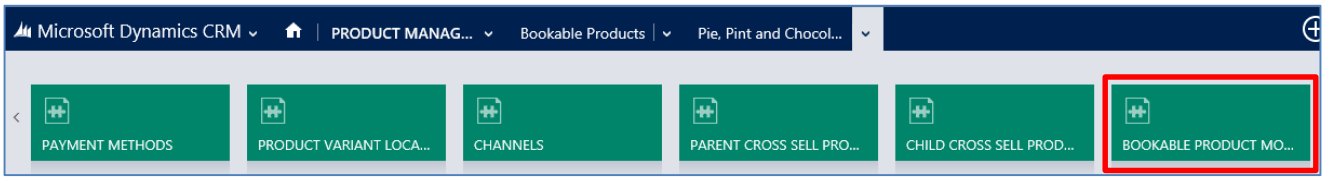
STEP 4. CREATE BOOKABLE PRODUCT MODIFIERS

Bookable Product Modifiers must be created to link the Meal Deal Options created in Step 2, for example Pie, Pint and Chocolate to the Meal Deal (Step1).

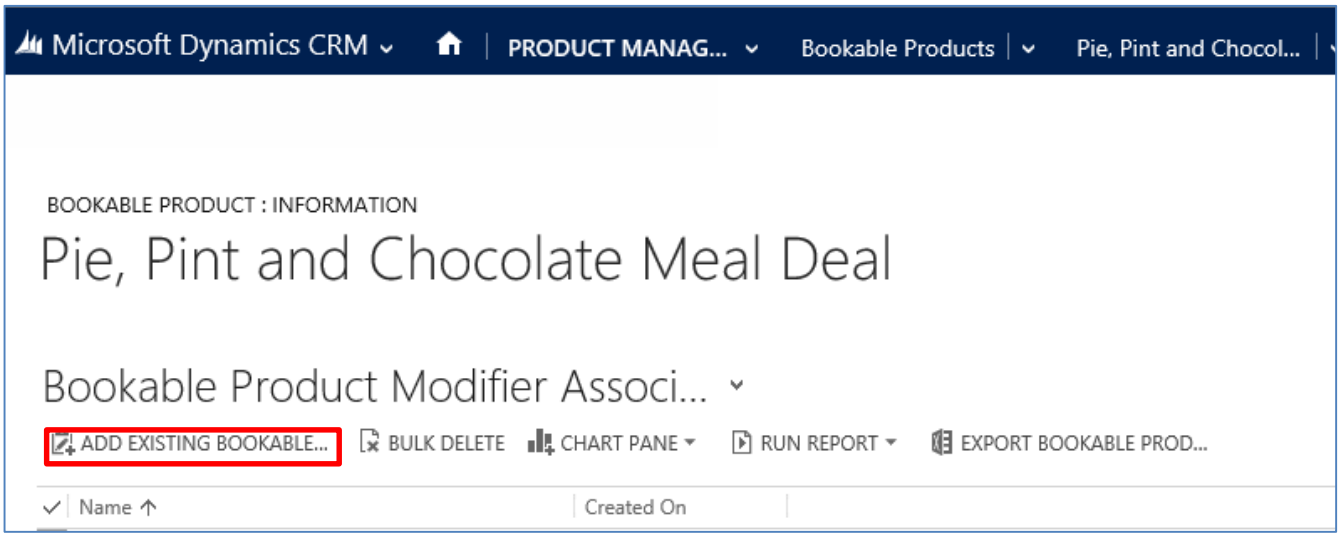
To do this, complete the following:

a) In the navigation bar select **Product Management** before selecting **Bookable Products** from the Product Management drop down. Then open up the Bookable Product that is representing the Meal Deal, in this example it would be the Pie, Pint and Chocolate Meal Deal Bookable Product that was created in Step 1 of Section 2.3.

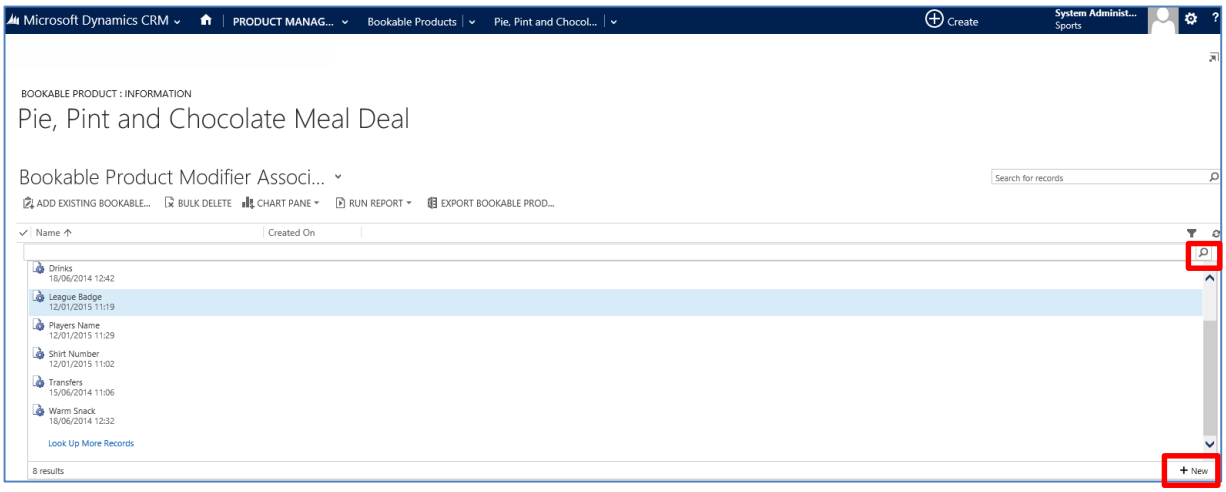
b) With the Bookable Product form open, select the small arrow next to the name of the Bookable Product in the navigation bar and from the drop down, select **Bookable Product Modifiers**.



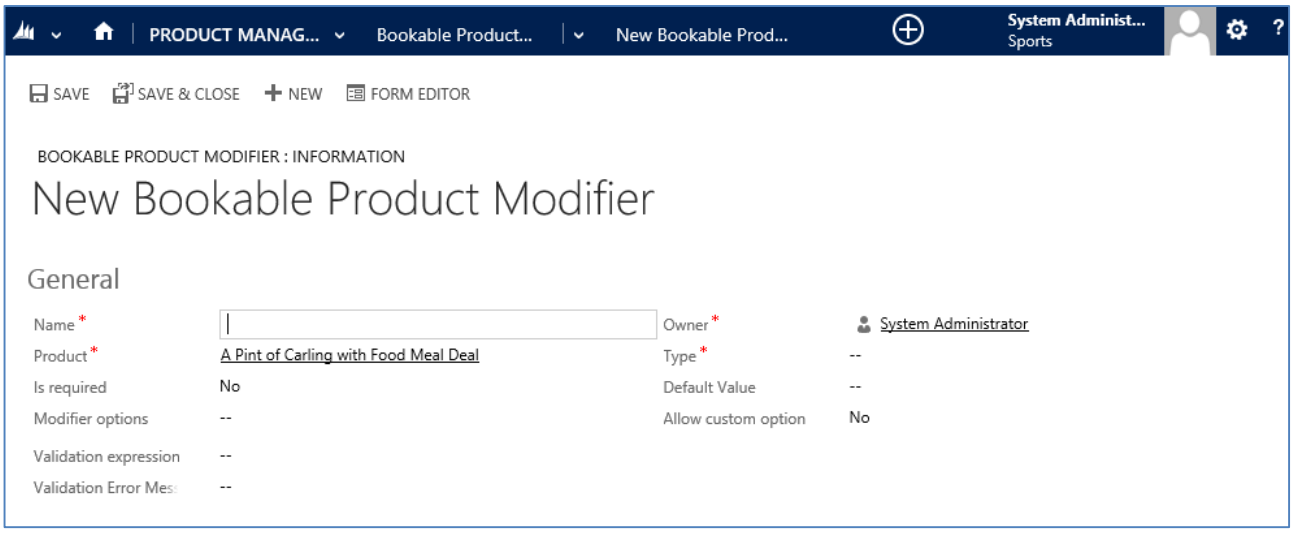
c) The Bookable Product Modifier Associated view will be displayed. Select **Add Existing Bookable Product Modifier** in the ribbon.



d) A drop down will appear, select the magnifying glass icon and choose **New.**



e) This will open up a new Bookable Product Modifier form, complete the following:



- **Name**. Enter a name of the Bookable Product Modifier.
- **Product**. Use the magnifying glass to Look up to find the Bookable Product that was created in Step 2 of section 2.3. In this example that could be Pint, Pie or Chocolate.
- **Is required.** Select **No.**
- **Modifier option**. Leave this field blank.
- **Validation expression.** Leave this field blank.
- **Owner.** This field will already be completed.
- **Type.** Select **Options** from the drop down menu.
- **Default Value.** Leave this field blank.
- **Allow custom option.** Select **No.**

f) Select **Save** in the ribbon.

EXAMPLE OF A BOOKABLE PRODUCT MODIFIER RECORD CREATED FOR STEP 4

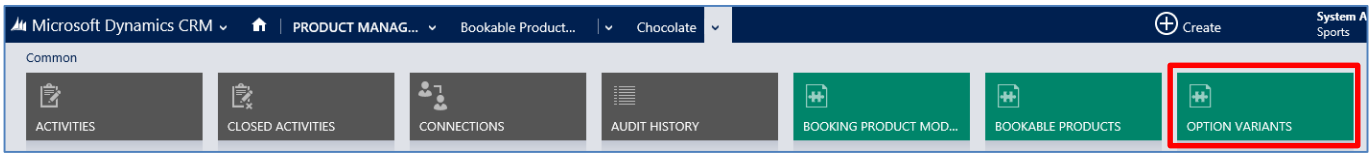
The table below shows the three different Bookable Product Modifiers that have been created for the example of a Pint, Pie and Chocolate Meal Deal. The examples below and information entered has been created for this document.

Record Created	Name	Product	Is Required	Owner	Type	Allow custom option
Bookable Product Modifier	Pint	Pint	No	System Administrator	Options	No
Bookable Product Modifier	Pie	Pie	No	System Administrator	Options	No
Bookable Product Modifier	Chocolate	Chocolate	No	System Administrator	Options	No

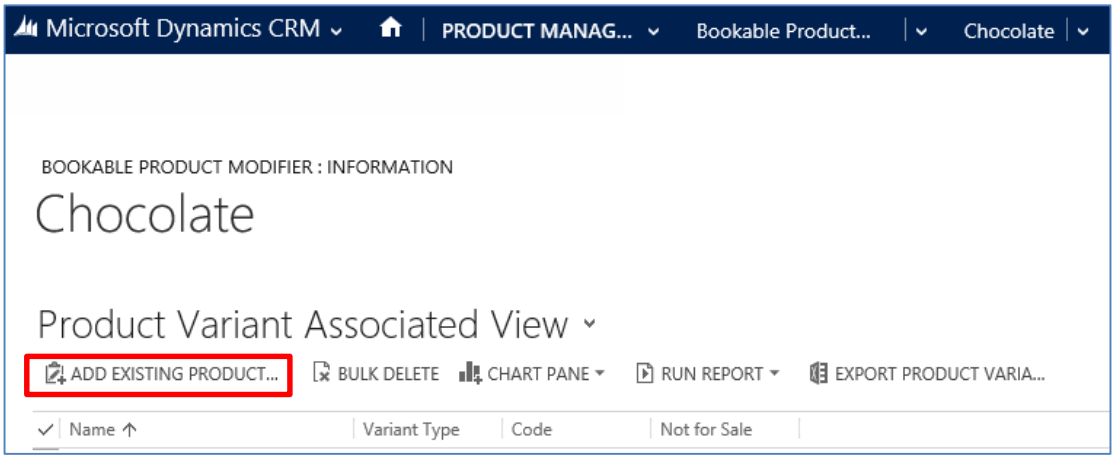
STEP 5. CREATE THE OPTION VARIANTS

The Option Variants link the specific type of products created in Step 3 of section 2.3 that are going to be offered as part of the Meal Deal. In this example these are the options of a Carlsberg, Fosters, Guinness, Mars Bar, Twix, Kit Kat, Steak pie, Chicken pie and Vegetable pie.

a) With the Product Modifier form still open, select the small arrow next to the name of the Product Modifier in the navigation bar and from the drop down choose **Option Variants**.



b) The Product Variant Associated View will be displayed, select **Add Existing Product Variant** on the ribbon.



c) Select **Add Existing Product Variant** in the ribbon.

d) A drop down will appear, use the magnifying glass to look up and find the Product Variants that are to be part of the Meal Deal and were previously created in Step 3 of section 2.3, these should match the same category of products in the bookable Product Modifier. In this example the Bookable Product Modifier is Chocolate, the option variants that need to be found are the Chocolate type products that were previously created, these being the Twix, Mars Bar and Kit Kat.

e) The Product Variants will be shown in the Product Variant Associated View when they have been added. After adding all the Option Variants that will make up the Meal Deal, select the Save icon in the bottom right hand corner of the screen.

f) From here repeat Steps 4 and Step 5 of section 2.3 for each of the Modifiers and Option Variants that you need to create for your Meal Deal. In this example a further two Product Modifiers would have to be created as seen in the Example of Step 4, these being Pint and Pie whilst the Option Variants available on the Meal Deal (The specific types of Pints and Pies) would need to be added.

EXAMPLE OF OPTION VARIANT RECORDS CREATED FOR STEP 5 BEING LINKED TO THE RELEVANT PRODUCT MODIFIERS

The table below shows the three different Bookable Product Modifiers that have been created for the example of a Pint, Pie and Chocolate and the Option Variants that are linked to each Bookable Product Modifier. The examples below and information entered has been created to show for this document.

Bookable Product Modifier	Option Variants
Pint	Carlsberg (Each) Guinness (Each Fosters (Each)
Pie	Chicken (Each) Steak (Each) Vegetable (Each)
Chocolate	Mars Bar (Each) Twix (Each) Kit Kat (Each)

MEAL DEAL 3: OVERVIEW

Task	Completed?	Comments
1. Created the Deal Variant Types		Ensure that a Variant Type of Deal has been created in CRM 2015. This Variant Type will only need creating once within the system.
2. Created Variant Price Lists		Ensure an active Variant Price List has been created. This is where Prices are defined in the Bookable Product form and is linked to the Channel Price List.
3. Created a Channel Price List		The channel price list should be linked to the Sales Plan type of Other. The Channel Price List should link the Channels to the Variant Price List on which prices have been entered. Ensure the Channel Price List dates are valid. A Channel Price List will need to be created for each Variant Price List – Channel combination created.

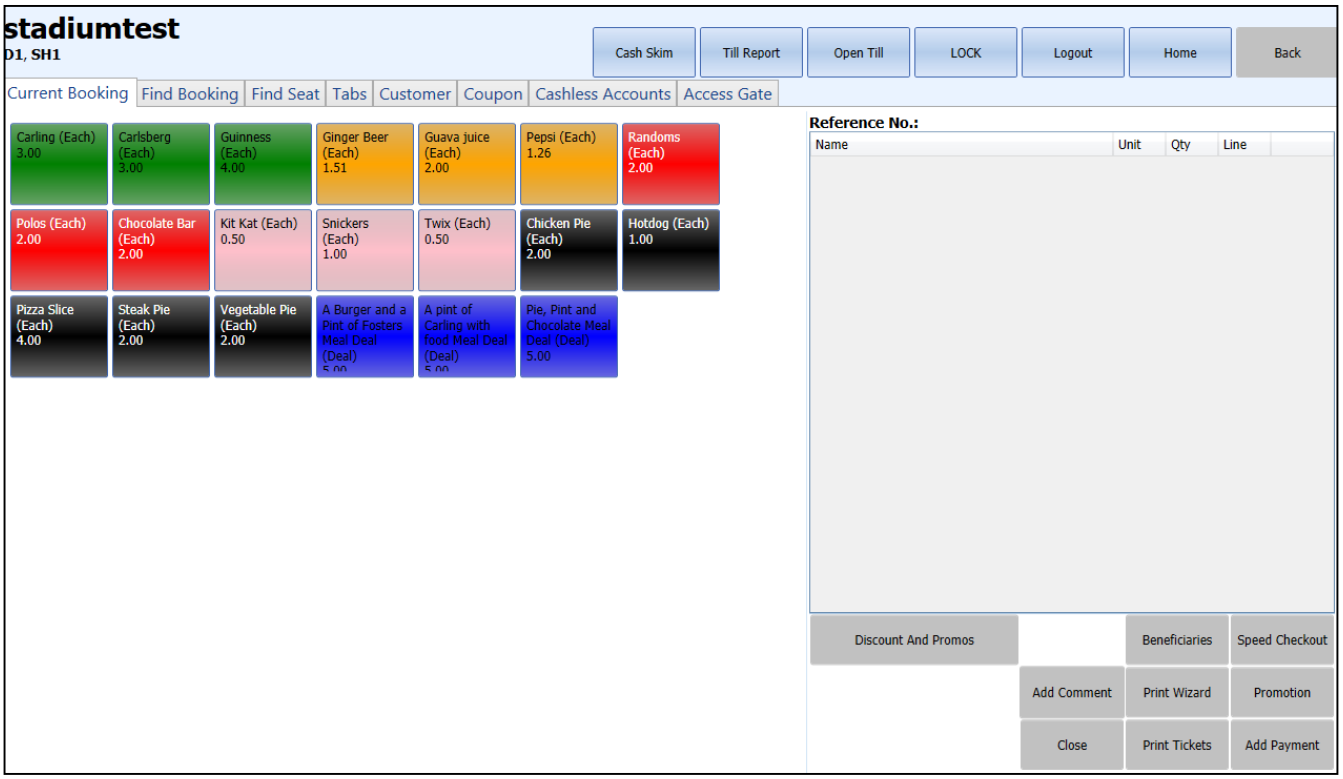
4. Created the overall Meal Deal Bookable Product. i.e. A Pie, Pint and Chocolate Meal Deal		Ensure the Bookable Product Type is set as **Stock** Ensure the Meal Deal flag is set to **Yes** Ensure a **Category** for example, Meal Deal, has been entered Ensure the relevant **Channel** check boxes are ticked Ensure the Variant Type (Deal) is listed Enter the price of the Meal Deal using an active Variant Price List that has been linked to a Channel Price List.
5. Created the Bookable Products that are to be part of the Meal Deal. i.e. The food in the Meal Deal, for example; Pie, Pint and Chocolate.		Ensure the Bookable Product Type is set as **Stock** Ensure a **Category**, for example Meal Deal, has been entered Ensure the relevant **Channel** check boxes are ticked Ensure the Variant Type (Each) is listed Ensure the price of the product entered is **£0.00** and that an active Variant Price List has been linked to a Channel Price List. Tick the **Not for Sale flag** in the Variant and Pricing section
6. Created the Bookable Product types- A Bookable Product must be created for each specific type of product that is included in the Meal Deal. For example the type of pies on offer could be steak, chicken or vegetable		Ensure the Bookable Product Type is set as **Stock** Ensure a **Category**, for example Meal Deal, has been entered Ensure the relevant **Channel** check boxes are ticked Ensure the Variant Type (Each) is listed If the product can be sold separately ensure the price of the product entered represents the price of the product when sold on its own and that an active Variant Price List has been linked to a Channel Price List.
7. Created the Bookable Product Modifier to link the various Meal Deal options. For example linking the Pie, Pint and Chocolate to the Meal Deal itself.		The **Is required** field must be set to **No** The **Type** field must be selected as **Options** The **Product** field should display one of the Bookable Products that were created to be a part of the Meal Deal to link to the Bookable Product Modifier. The **Allow Custom option** field must be set to **No**
8. Created the Option Variants that link the products types that are going to be offered as part of the Meal Deal to the Meal Deal itself. For example the option of a steak, chicken or vegetable pie.		Add the product types that are going to be offered as part of the Meal Deal, for example a steak, chicken and vegetable pie

MEAL DEAL 3 IN THE POS

Upon completion of setting up this type of Meal Deal within CRM (Pie, Pint and Chocolate Meal Deal in this example) it will be displayed in the POS. Please note that the Meal Deals in this example are coloured in blue, as this is the colour selected for the Category type of Meal Deal.

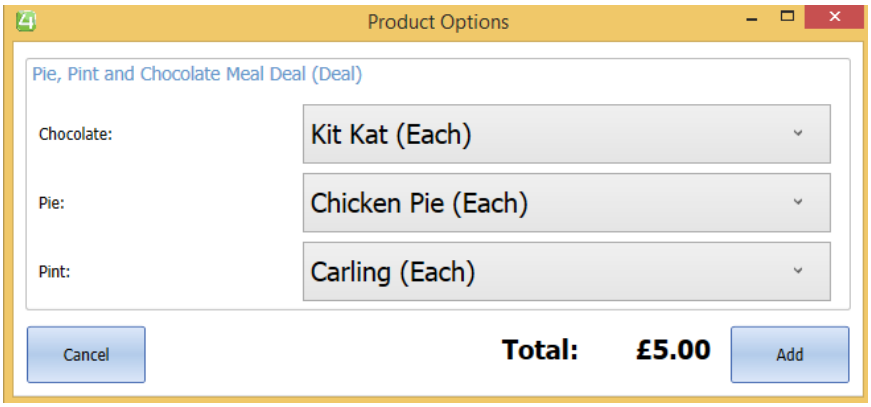
To view and purchase this type of Meal Deal complete the following:

a) Open up the POS, the food and beverage products that you are selling will be displayed.



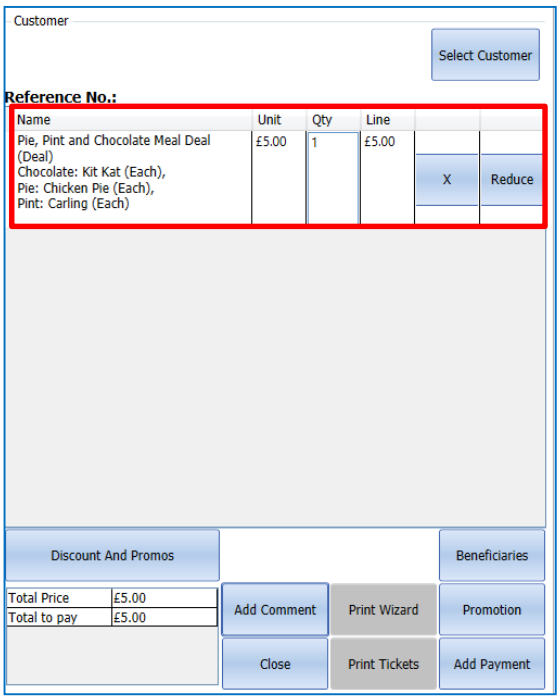
b) Select the Meal Deal that you have previously created, in this example that being, Pie, Pint and Chocolate Meal Deal, as highlighted below.

c) A Product Options dialogue will be displayed, from here it will be possible to select the specific types of the products that are part of the Meal Deal from the drop downs.



d) After selecting each drop down to display the correct Meal Deal combination, choose **Add**.

e) The Meal Deal will appear in the shopping cart area as is displayed below. Select **Add Payment** to complete the purchase.



3. OPTIONAL EXTRAS

After creating a Meal Deal in CRM it is possible to have optional extras displayed which the operator can add to the Meal Deal for an extra cost. For example a customer may have elected to have the pie, pint and chocolate Meal Deal, and with this Meal Deal for an additional cost it may be possible for the operator to select another product for example a slice of pizza or packet of crisps.

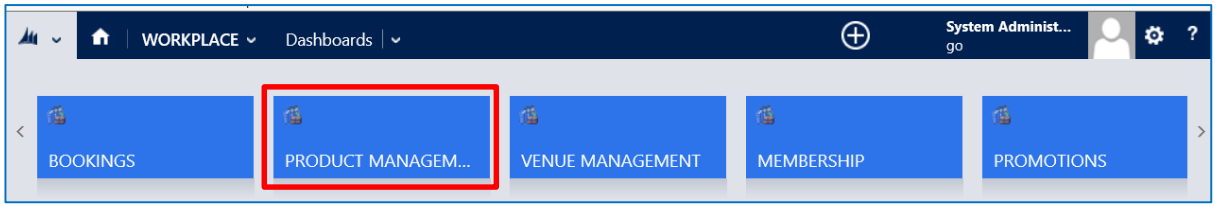
To create Optional Extras for a Meal Deal complete the following steps:

STEP 1. CREATE THE OPTIONAL EXTRA AS A BOOKABLE PRODUCT

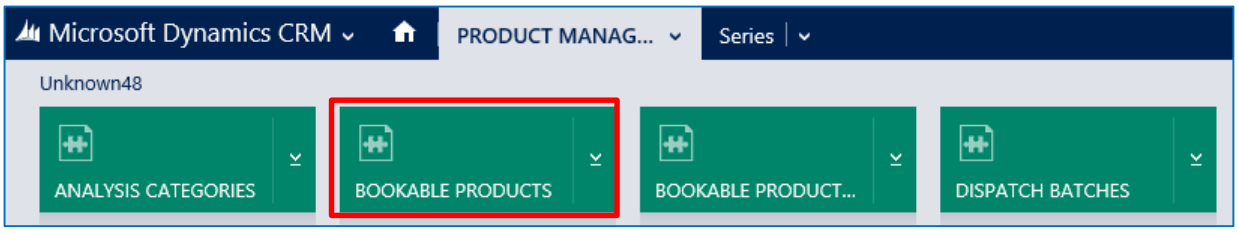
Note. This section assumes that Variant Types, valid Variant Price Lists and Sales Plan/Channel Price List have been created for the Bookable Product.

If the Optional Extra to be added to the Meal Deal does not already exist as a Bookable Product, it will need to be created, for example the Pizza Slice or Packet of Crisps. If a Bookable Product that represents the Optional Extra already exists, skip to Step 2 of section 3

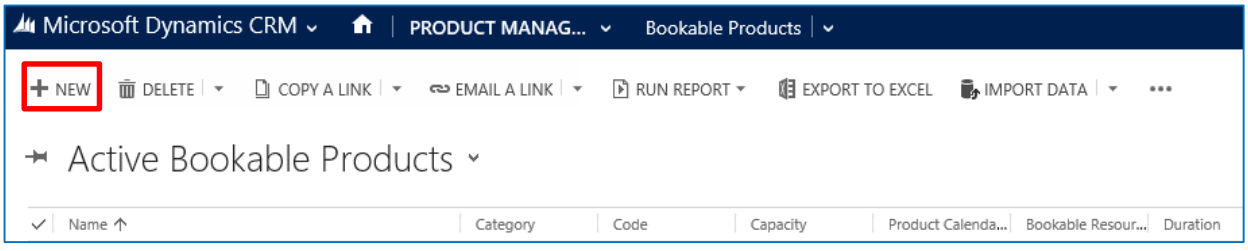
a) Select or hover over the **Microsoft Dynamics CRM** tab before scrolling across the drop down list of the navigation bar and selecting **Product Management**.



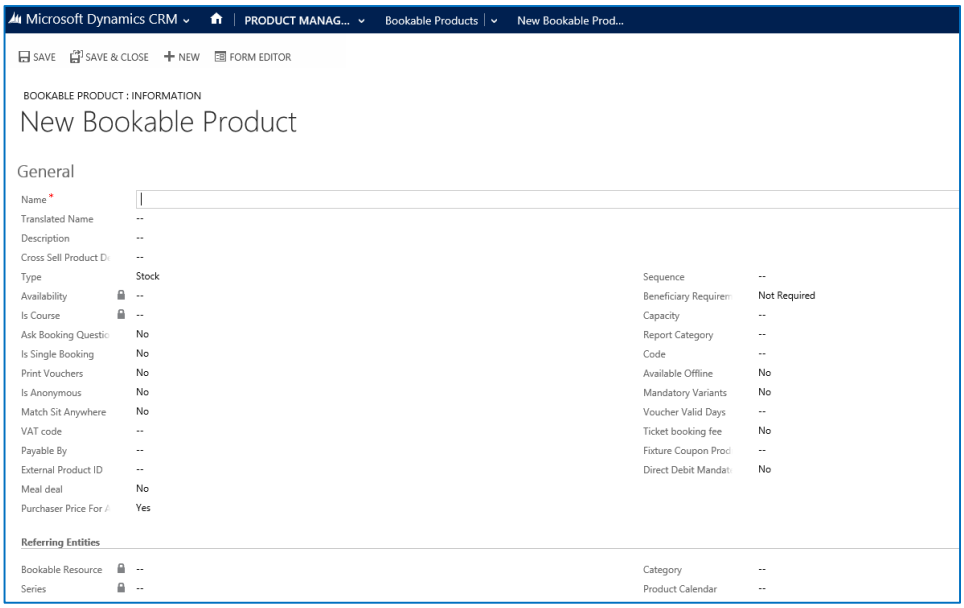
b) Next, in the Product Management area of CRM, select the **Product Management** tab before selecting **Bookable Products** from the drop down.



c) A list of the currently active Bookable Products will be displayed. Select **New** on the ribbon.



d) A blank Bookable Product form will be displayed. Complete the following:



General:

- **Name.** Enter a name for the product. The name will be visible to the operator and should therefore reflect the nature of the product. For example, a slice of Pizza or packet of sweets.
- **Translated Name.** Used for translated implementations.
- **Description.** Enter a description of the product.
- **Type.** Use the drop-down list to select the type of product. In this instance select **Stock** from the list of available values.
- **Sequence.** Enter a sequence number for the product. The sequence number is used to determine the order in which products are displayed in the POS and Web channels.
- **Beneficiary Requirement.** Use the drop-down list to select if a customer's name is required when the product is purchased. For stock products this option should be set to **Not Required**.
- **Report Category.** Can be used for reporting purposes to categorise the products sold through Green 4 F&B.
- **Code.** Can be used to enter the barcode for products sold through the Green 4 F&B POS.
- **Is Anonymous.** Select **Yes** if the purchaser is not required to provide a name when buying the product. The channel must be set up to anonymous purchases also.
- **Available Offline.** Select **Yes** if the bookable product is to be available for purchase through the offline POS. This option cannot be used for products that require capacity to be monitored.

Referring Entities:

- **Category.** Use the Look Up Records dialog to select the product category. The category is used to group products, for example Meal Deals, alcoholic drinks, soft drinks etc.

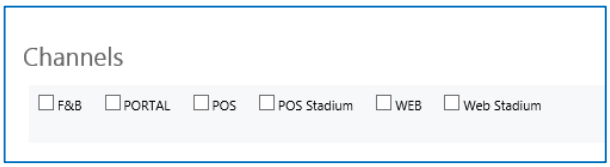
Note. All other fields in the Bookable Product form that have not been described above do not need to be completed/changed.

e) When the details are complete select **Save** on the ribbon.

f) Next, it is necessary to indicate which **Channels** the product can be bought. To set the Channels carry out the following:

i. Scroll down to the **Channels** section of the Bookable Product form

ii. The Channels that have been set up during the configuration on your system will be listed. Select the checkbox alongside each Channel through which the product will be sold.

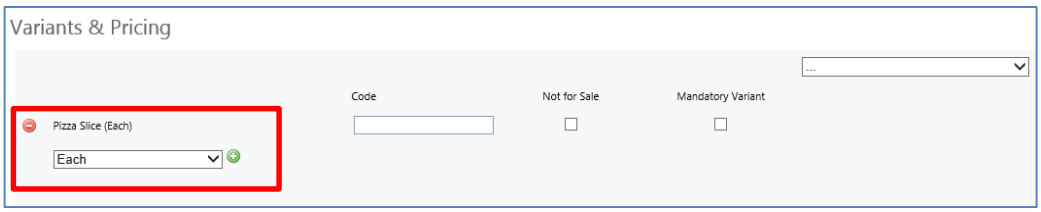


iii. Select **Save** on the ribbon.

g) Next, it is necessary to identify the Product Variants and Prices:

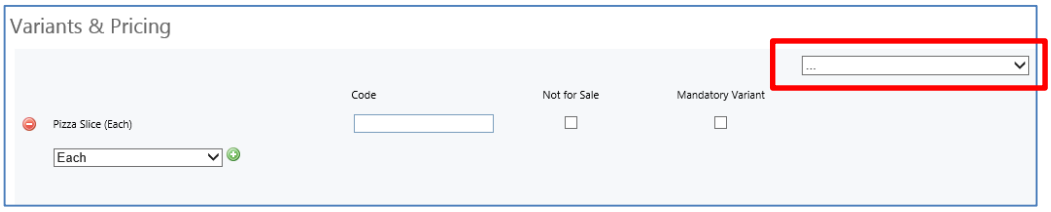
i. Scroll down to the **Variants & Pricing** section of the Bookable Product form.

ii. To select a **Variant**, in the drop-down list on the left hand side (highlighted below), select the appropriate option. All of the variants available in your system will be listed. If you have categorised the variants they will displayed in the relevant categories. For an Optional Extra, use the Variant Type of Each.



h) Next, the price of the product must be entered, to do this:

i. Select the relevant **Variant Price List** from the drop down at the right hand side of the Variants & Pricing section (highlighted below).



ii. If the product can also be sold separately you must enter price information for the individual price of the product on its own, select the relevant price list from the drop down at the top of the Variants & Pricing section.

i) Select **Save and Close** on the ribbon. Repeat the above process to create each of the Optional Extra product types that can be added when a Meal Deal is selected.

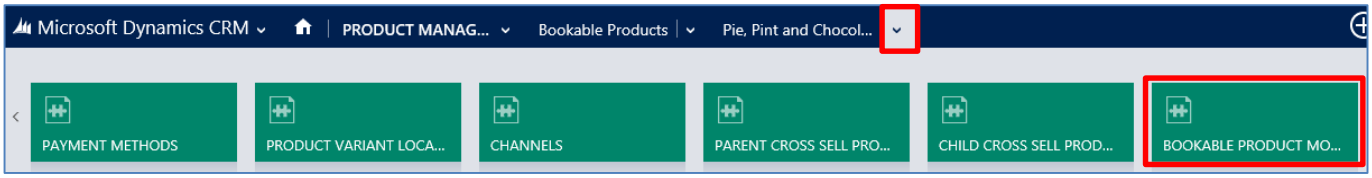
STEP 2. LINKING THE OPTIONAL EXTRA TO THE MEAL DEAL AS A BOOKABLE PRODUCT MODIFIER

Next it is essential to link the Optional Extra Bookable Product created in Step 1 of section 3 (or which may already exist), to the Meal Deal Bookable Product itself using a Bookable Product Modifier. In the example being used this is where the Pizza Slice or Crisps are linked to a Pie, Pint and Chocolate Meal Deal.

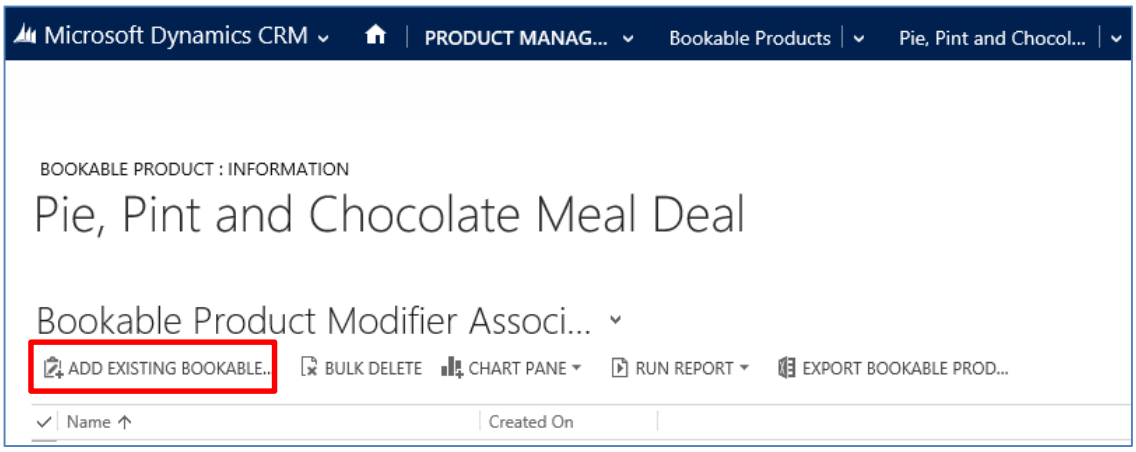
a) In the navigation bar select **Product Management** before again selecting Product Management and choosing **Bookable Products** from the drop down.

b) A list of Active Bookable Products will be displayed. Find the Meal Deal which the Optional Extras are to be added to and open it. In this example this is the Pie, Pint and Chocolate Meal Deal.

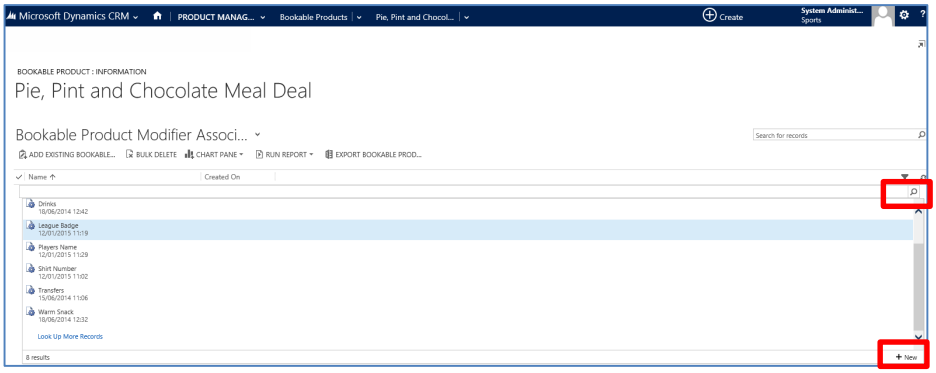
c) In the opened Meal Deals Bookable Product Form, select the small arrow on the navigation bar next to the name of the Bookable Product and from the drop down choose **Bookable Product Modifiers**



d) The Bookable Product Modifier Associated View will be displayed, select **Add Existing Bookable Product Modifier** on the ribbon.



e) A drop down will appear, select the magnifying glass icon and choose **New.**

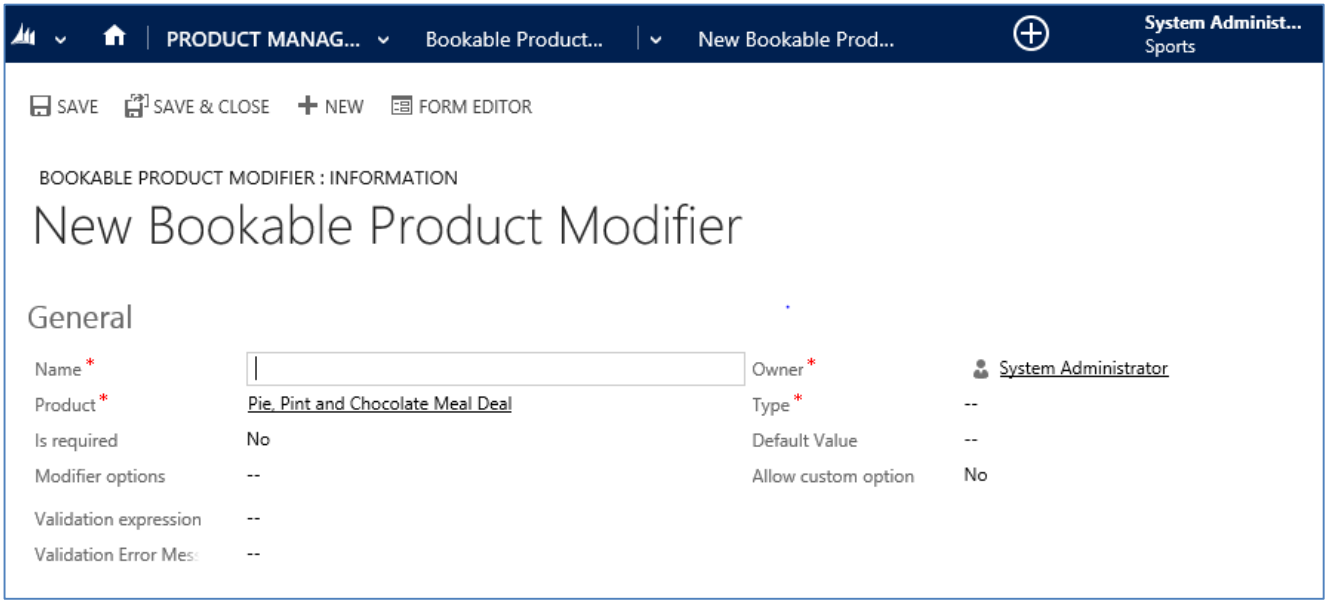


f) A new Bookable Product Modifier form will be displayed. From here it is possible to either create a Bookable Product Modifier type of **String** or **Bool.**

- **String.** Select the type **String** if the Optional Extra has a number of types you can select from. For example this could be used if the Optional Extra is a Pizza Slice, as there may be different types of Pizzas that can be selected such as BBQ, Margherita or Meat Feast.

  Additionally **String** will need to be selected if there is an option to customise the Optional Extra. For example the operator will be able to enter the type of Pizza that the customer is having as a blank custom option field can be displayed.

- **Bool.** Select the type **Bool** if the Optional Extra does not have differing types and is either selected by a single button to add it to the Meal Deal or is left unselected and therefore not added. For example this could be used if the Optional Extra is a single specific packet of crisps or sweets.



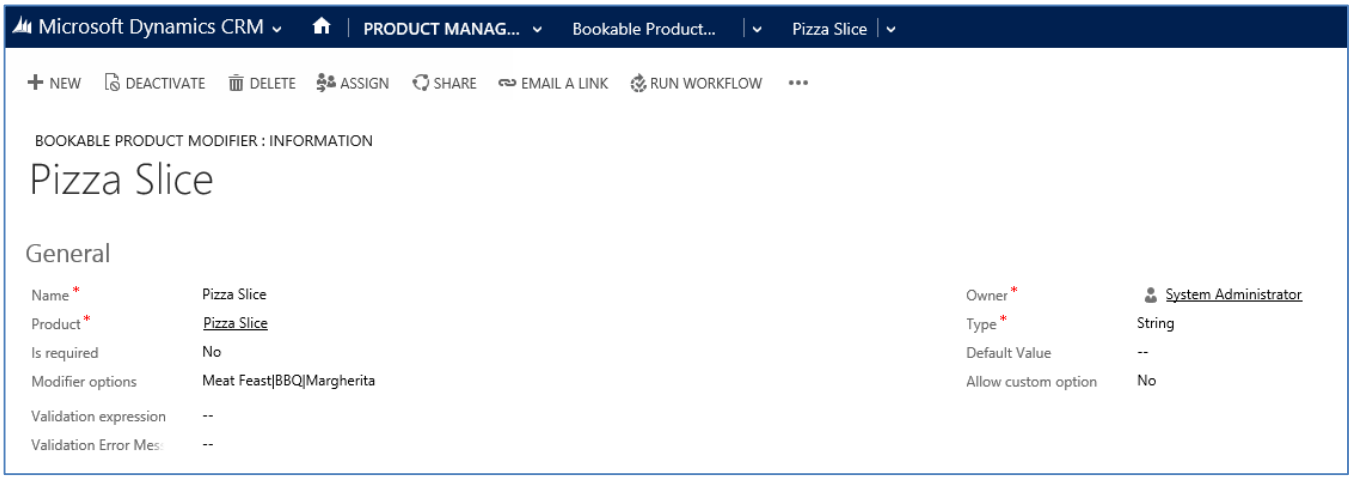
Creating an Optional Extra Bookable Product Modifier Type- String

A Bookable Product Modifier type of String is used if the Optional Extra has a number of types you can select from. For example this could be used if the Optional Extra is a Pizza Slice, as there may be different types of Pizzas that can be selected such as BBQ, Margherita or Meat Feast.

a) With the Bookable Product Modifier form open, complete the following:

- **Name.** Enter a name of the Bookable Product Modifier. In this example Pizza Slice
- **Product.** Use the Look Up to find the Optional Extra Bookable Product. This would be the Bookable Product that was created in Step 1 of section 3 or already exists in the system. In this example that being a Pizza Slice.
- **Is required.** Select **No.**
- **Modifier options**. Enter the differing types of the Optional Extra that are available, these must be entered and separated with a pipe (|) character. For example for a Pizza slice where different types of pizza can be selected, each type of pizza would need to be entered here with a pipe (|) separating each name: Meat Feast|BBQ|Margherita
- **Validation expression.** This field can be left blank

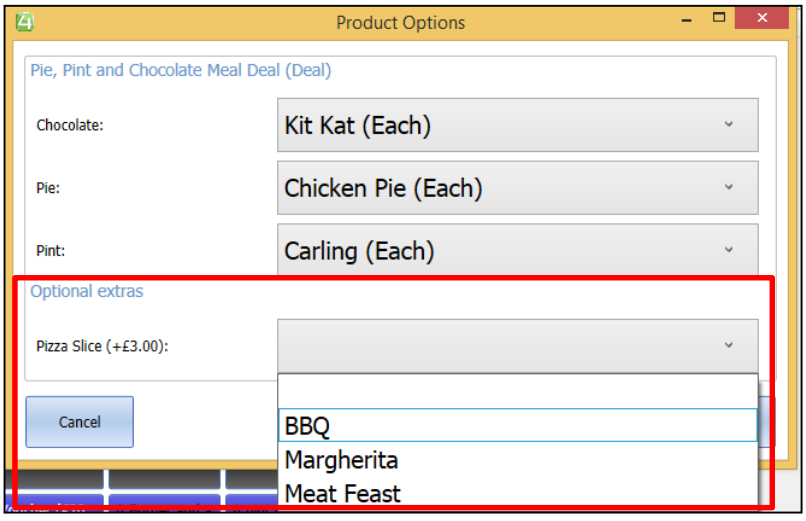
- **Owner.** This field will already be completed.
- **Type.** Select the type **String.**
- **Default Value.** If applicable, enter the Value which will be displayed in the POS before any other option.
- **Allow custom option.** Select **No.**



b) Select **Save and Close** on the ribbon.

c) The Bookable Product Modifier will have been added. Repeat the instructions for any other Bookable Product Modifiers Optional Extras that are of the type **String.**

d) In the POS after selecting a Meal Deal that has had Optional Extras added to it which were created with a Bookable Product Modifier type of **String**, the POS will display the Optional Extra with a drop down menu to show the differing types of the product. This can be seen in the example below.



The appropriate type of the product can then be selected before confirming all of the contents of the Meal Deal and Optional Extras. Select **Add** to add the Meal Deal and any Optional extras to the shopping cart where it can then be paid for in the usual way. The additional cost of any selected Optional Extras will be added on top of the cost of the Meal Deal.

Creating an Optional Extra Bookable Product Modifier Type- String- Custom Option

A Bookable Product Modifier type of **String** can also be used if the Optional Extra can be customised for the operator to enter their own description into a field. For example the operator will be able to enter the type of Pizza that the customer wants if it is not displayed in the drop down list.

a) Enter the following into the Bookable Product Modifier form:

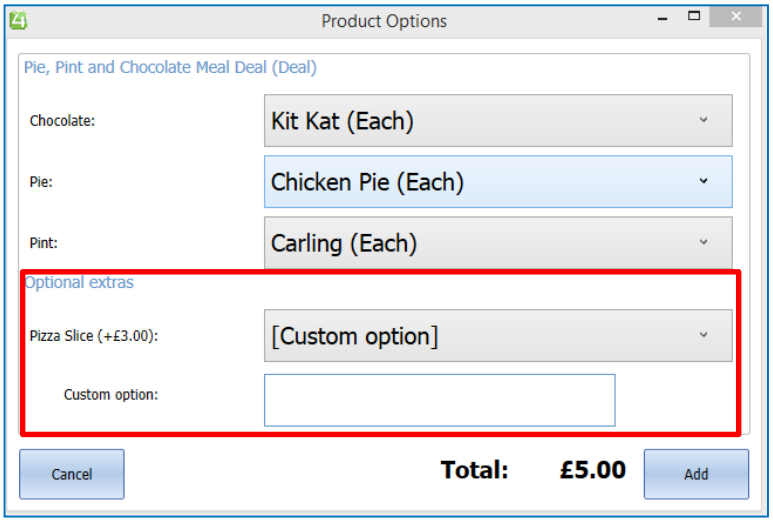
- **Name.** Enter a name of the Bookable Product Modifier. In this example Pizza Slice.
- **Product.** Use the Look Up to find the Optional Extra Bookable Product. This would be the Bookable Product that was created in Step 1 of Section 3 or already exists in the system. In this example that being a Pizza Slice.
- **Is required.** Select **No.**
- **Modifier options**. Enter the differing types of the Optional Extras available, these must be entered and separated with a pipe (|) character. For example for a Pizza slice where different types of pizza can be selected, each type of pizza would need to be entered here with a pipe (|) separating each name: Meat Feast | BBQ | Margherita.

  It is also possible to leave this field blank which will also leave an appropriate blank field in the POS so that an operator can enter the product into it.
- **Validation expression.** This field can be left blank.
- **Owner.** This field will already be completed.
- **Type.** Select the type **String.**
- **Default Value.** If applicable, enter the Value that will be displayed in the POS before any other option.
- **Allow custom option.** Select **Yes.**

b) Select **Save and Close** in the ribbon.

c) The Bookable Product Modifier will have been added. Repeat the instructions for any other Bookable Product Modifier optional Extras that are of the type String and allow a Custom Option.

d) In the POS after selecting a Meal Deal that has had Optional Extras added to it which were created with a Bookable Product Modifier type of String and the **Allow Custom Option** flag set to **Yes,** as described above, the POS will display the Optional Extra with a Custom Option field, where the operator can enter text. This is shown in the example below.



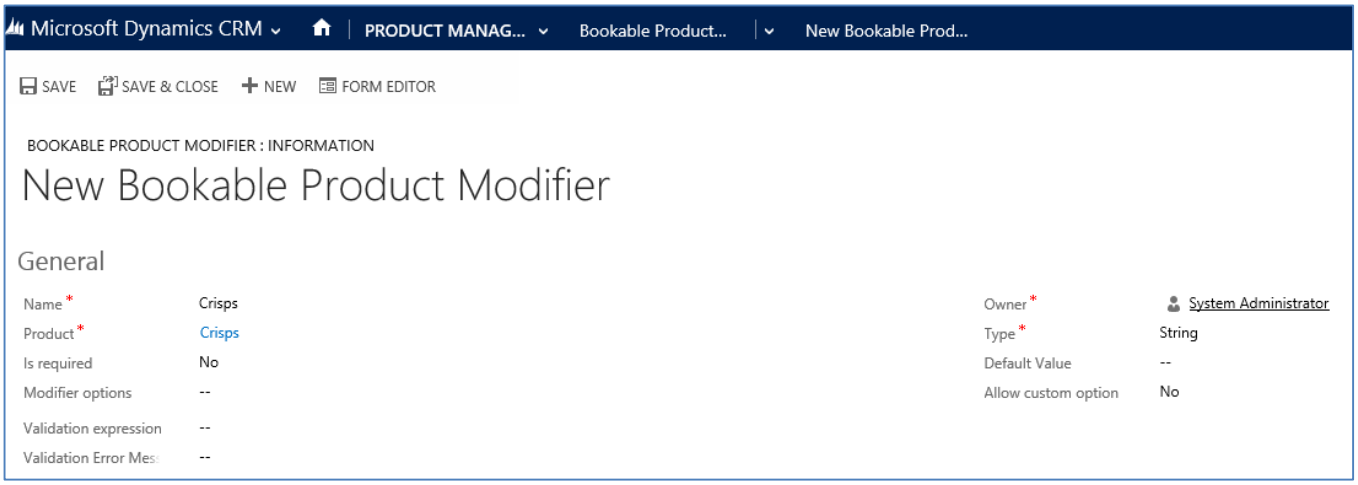
If necessary Text can then be added before confirming all of the contents of the Meal Deal and Optional Extras. Select **Add** to add the Meal Deal and any Optional extras to the shopping cart where it can then be paid for in the normal way. The additional cost of the Optional Extra will be added on top of the cost of the Meal Deal.

Creating an Optional Extra Bookable Product Modifier Type- Bool

A Bookable Product Modifier type of **Bool** is used if the Optional Extra does not have differing types and is either selected by a single button to add it as an Optional Extra or is simply not selected and is not added. For example this could be used if the Optional Extra is a single specific packet of crisps or sweets.

a) Enter the following into the Bookable Product Modifier form.

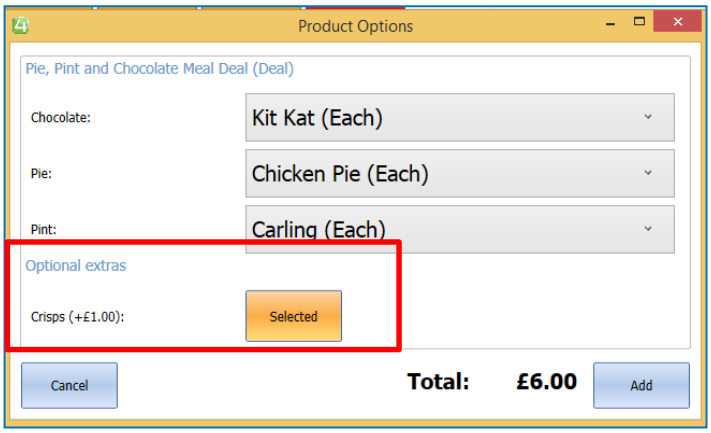
- **Name.** Enter a name of the Bookable Product Modifier, for example Crisps.
- **Product.** Use the Look Up to find the Optional Extra Bookable Product. This would be the Bookable Product that was created in Step 1 of Section 3 or which already exists in the system. In this example that being Crisps.
- **Is required.** Select **No.**
- **Modifier options**. This field can be left blank.
- **Validation expression.** This field can be left blank.
- **Owner.** This field will already be completed.
- **Type.** Select the type **Bool.**
- **Default Value.** This field can be left blank.
- **Allow custom option.** Select **No.**



b) Select **Save and Close** in the ribbon.

c) The Bookable Product Modifier will have been added. Repeat the instructions for any other Bookable Product Modifiers Optional Extras that are of the type Bool.

d) In the POS after selecting a Meal Deal that has had Optional Extras added to it which were created with a Bookable Product Modifier type of Bool, as described above, the POS will display the Optional Extra with a button. This is shown in the example below.



If the Optional extra is to be added to the Meal Deal, the button which can be selected will turn orange and the wording will change from **Not Selected** to **Selected**. Select **Add** to add the Meal Deal and the Optional Extras to the shopping cart where it can then be paid for in the usual way. The additional cost of any selected Optional Extras will be added on top of the cost of the Meal Deal.

OPTIONAL EXTRA OVERVIEW

Task	Completed?	Comments
1. Created Variant Types		Create the type of Bookable Product you can purchase. For example an Optional Extra may have a Variant Type of **Each**
2. Created Variant Price Lists		Prices are defined using Variant Price Lists in the Bookable Product form and is linked to the Channel Price List
3. Created a Channel Price List		The Channel Price List should be linked to the default Sales Plan The Channel Price List should link the Channels to the Variant Price List on which prices have been entered. Ensure the Channel Price List dates are valid. A channel price list will need to be created for each Variant Price List – Channel combination created.
4. Created the Optional Extra as a Bookable Product		Ensure the Bookable Product Type is set as **Stock** Ensure a **Category** for example, has been entered Ensure the relevant **Channel** check boxes are ticked Ensure the Variant Type is listed, usually **Each** with Optional Extras. Enter the price of the Optional Extra using an active Variant Price List that has been linked to a Channel Price List.

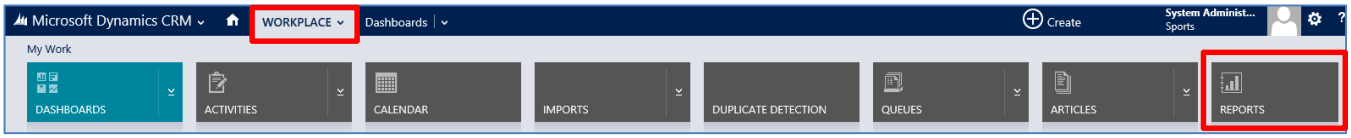
5. Linked the Optional Extra to the Meal Deal as a Bookable Product Modifier		Ensure the Meal Deal Bookable Product has a Bookable Product Modifier Create a Bookable Product Modifier type of either **String** or **Bool**
6. If creating a Bookable Product Modifier type of String		Ensure **Is Required** is set to **No** Ensure the **Type** selected is **String** Ensure the appropriate **Product** has been selected Ensure the **Modifier Options** have been completed, separated with a Pipe (|) Ensure **Allow Custom Option** is set to **No**
7. If creating a Bookable Product type of String- Custom Option		Ensure **Is Required** is set to **No** Ensure the **Type** selected is **String** Ensure the appropriate **Product** has been selected Ensure **Allow Custom Option** is set to **Yes**
8. If creating a Bookable Product type of Bool		Ensure **Is Required** is set to **No** Ensure the **Type** selected is **Bool** Ensure the appropriate **Product** has been selected Ensure **Allow Custom Option** is set to **No**

4. MEAL DEAL REPORTS

A Meal Deal Report is available and can be generated to display what Meal Deals have been sold and the Meal Deal choices that have been selected. Any optional extras that have been added to the Meal Deal are also shown in the report.

To generate the report complete the following in CRM:

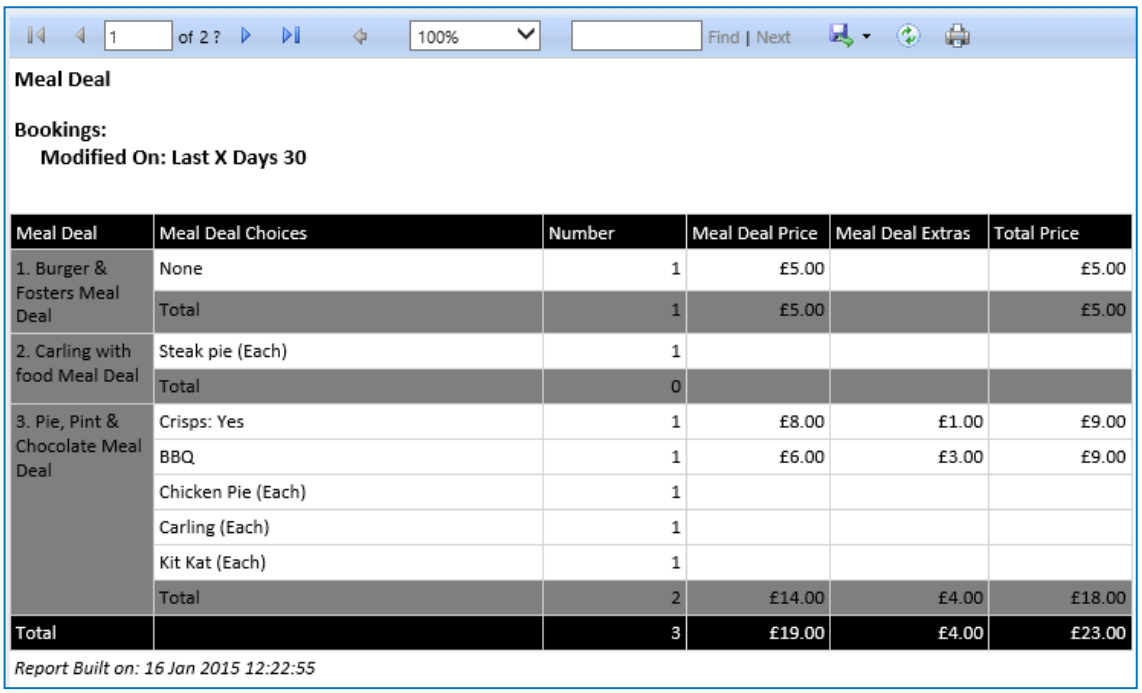
a) On the home page of CRM, select **Workplace** on the navigation area before choosing **Reports** from the drop down.



b) A list of Available Reports will be shown, find the **Meal Deal** report and double click on it for the Report Viewer screen to open.

c) Select the **Run Report** button.

d) The Meal Deal report will be generated. The example below shows the layout of a Meal Deal report. Please note there are 2 pages of the report with the second page displaying more detailed information:



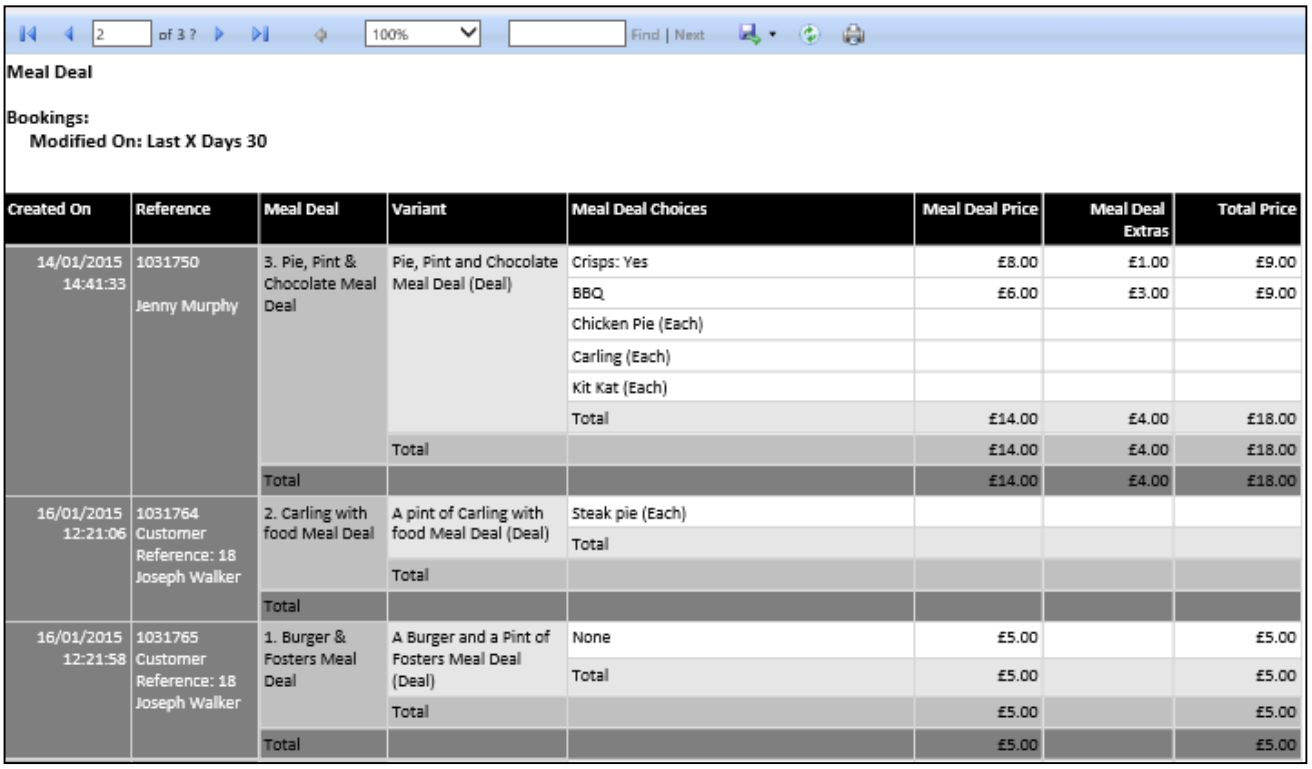
1 of 2 ? 100% Find | Next

Meal Deal

Bookings:
Modified On: Last X Days 30

Meal Deal	Meal Deal Choices	Number	Meal Deal Price	Meal Deal Extras	Total Price
1. Burger & Fosters Meal Deal	None	1	£5.00		£5.00
	Total	1	£5.00		£5.00
2. Carling with food Meal Deal	Steak pie (Each)	1			
	Total	0			
3. Pie, Pint & Chocolate Meal Deal	Crisps: Yes	1	£8.00	£1.00	£9.00
	BBQ	1	£6.00	£3.00	£9.00
	Chicken Pie (Each)	1			
	Carling (Each)	1			
	Kit Kat (Each)	1			
	Total	2	£14.00	£4.00	£18.00
Total		3	£19.00	£4.00	£23.00

Report Built on: 16 Jan 2015 12:22:55



2 of 3 ? 100% Find | Next

Meal Deal

Bookings:
Modified On: Last X Days 30

Created On	Reference	Meal Deal	Variant	Meal Deal Choices	Meal Deal Price	Meal Deal Extras	Total Price
14/01/2015 14:41:33	1031750 Jenny Murphy	3. Pie, Pint & Chocolate Meal Deal	Pie, Pint and Chocolate Meal Deal (Deal)	Crisps: Yes	£8.00	£1.00	£9.00
				BBQ	£6.00	£3.00	£9.00
				Chicken Pie (Each)			
				Carling (Each)			
				Kit Kat (Each)			
				Total	£14.00	£4.00	£18.00
			Total		£14.00	£4.00	£18.00
		Total			£14.00	£4.00	£18.00
16/01/2015 12:21:06	1031764 Customer Reference: 18 Joseph Walker	2. Carling with food Meal Deal	A pint of Carling with food Meal Deal (Deal)	Steak pie (Each)			
				Total			
			Total				
		Total					
16/01/2015 12:21:58	1031765 Customer Reference: 18 Joseph Walker	1. Burger & Fosters Meal Deal	A Burger and a Pint of Fosters Meal Deal (Deal)	None	£5.00		£5.00
				Total	£5.00		£5.00
			Total		£5.00		£5.00
		Total			£5.00		£5.00

Note: Meal Deal Components are also available for detailing on a receipt that can be printed as is displayed on the below example:

Petes FB Company Ltd

1031795

Pie, Pint and Chocolate 1 @ £5.00
Chocolate: Kit Kat (Each)
Pie: Chicken Pie (Each)
Pint: Carling (Each)

TOTAL (Inc. VAT) £5.00
(VAT) £0.74

NET (PAID) £5.00

VAT Number:845542123
Sold subject to standard terms and conditions.

End of Document