

CRM 2015

FOOD & BEVERAGE MEAL DEALS SETUP

USER GUIDE





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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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CONTACT

Any correspondence should be addressed to:

Product Development

Green 4 Solutions Limited 16-17 Midland Court Central Park Lutterworth Leicestershire LE17 4PN UK

Phone: +44 (0) 845 508 8149

Email: support@green4solutions.com

Web: www.green4solutions.com



FOOD &

BEVERAGE

INTRODUCTION

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

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.

4. MEAL DEAL REPORTS

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.

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.



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 <u>Meal Deal Configurations</u> can be set up, the setup shown below must have taken place.



1.1. VARIANT TYPE- DEAL









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.**

Microsoft Dynamics	CRM	∽ ≜	PRODUCT MANA	G ¥	Fixtures	~		
<	¥	VARIANT	YPES ⊻	++ VAT	CODES	¥	H VAT RATES	×

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.

≜ ∎ M	41 Microsoft Dynamics CRM 🗸 🔺 PRODUCT MANAG 🗸 Variant Types 🗸								
+ 1	🕇 NEW 🗴 DELETE 💌 🗋 COPY A LINK 🖙 🖘 EMAIL A LINK 🖙 🕑 RUN REPORT 👻 🕼 EXPORT TO EXCEL 🔹 IMPORT DATA 🖙 🚥								
+	Active Variant Types 🗸								
~	Name 个	People	Description	Category Sequence	Skidata Class Co Cre				
	Adult	1	Adult 15 years +	Tickets	1				
	Adult + Child	2	Adult + Child	Tickets	4				
	Child	1	Child 5 to 14	Tickets	3				
	Complimentary	1	Complimentary	Tickets	9				
	Deal	1		Sundry					
	Each	1	Each	Sundry					



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

Microsoft Dyna	nics CRM 🗸 🏦 PRODUCT MANAG 🗸 Variant Types 🗸 New Variant Type		
VARIANT TYPE : INFO			
	iant Type		
INCW Val	iant Type		
General			
Name *		People *	
Translated name	-		
Description	-		
Skidata Class Code	-	Category	
Voucher Value	-	Tariff Code	
Sequence	-	Conversion Factor	

- 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.

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



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

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**.

	Dashboards 🗸		(+)	System Administ	?
K BOOKINGS	A PRODUCT MANAGEM	M VENUE MANAGEMENT	MEMBERSHIP	14 PROMOTIONS	>

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**.

▲ Microsoft Dynamics CRM ~	♠ PRODUCT MANAG ~	Variant Types 🛛 🗸	
<	RIANT TYPES	codes 🛛 🗠	¥ VAT RATES

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:



M Microsoft Dynamics CRM マ 🍵 PRODUCT MANAG マ Variant Price Lists マ New Variant Price List		
🗔 SAVE 🛱 SAVE & CLOSE 🕂 NEW 🗐 FORM EDITOR		
variant price list : INFORMATION New Variant Price List		
General		
Name*	Price List Status *	Test
Prices		

- 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



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**.

		Dashboards \mid 🗸		(+)	System Administ
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	BOOKINGS	PRODUCT MANAGEM	VENUE MANAGEMENT	MEMBERSHIP	PROMOTIONS

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**.

🚈 Microsoft Dynamics CRM 🗸 👘				PRODUCT	MANAG	i v 🔹	/ariant Price	Lists 🗸				
<	FRODUCT VARIANT L	¥	H PRODUCT	ZONES	×	H RESERV	ATIONS	×	H SALES PLANS	⊻	H SERIES	×

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:

🏄 Microsoft Dynamics CRM 🗸 📫 PRODUCT MANAG 🖌 Sales Plans 🗸 New Sales Plan	
금 SAVE 같 ¹ SAVE & CLOSE ╋ NEW	
sales plan : Information New Sales Plan	
General	
Name *	Sales Plan Type *

- 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	Туре
Sales Plan	Default Sales Plan	Other (Linked to the Company Details form)



1.4. CHANNEL PRICE LISTS

Linked to <u>Sales Plans</u> 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**.

4		Dashboards 🛛 🛩		\oplus	System Administ
<	۵.	ı ه	ß	^d	1
	BOOKINGS	PRODUCT MANAGEM	VENUE MANAGEMENT	MEMBERSHIP	PROMOTIONS

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**.

4	Microsoft Dynamics C	CRM	~ f t	PRODUCT N	IANAG	i 🗸 V	ariant Price List	s 🗸				
<	PRODUCT VARIANT L	¥	PRODUCT	ZONES	¥	++ RESERVA	TIONS	¥	H SALES PLANS	×	H SERIES	×

- 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.

Microsoft Dynamics CRM	1 🗸 📫 product mana	G マ Sales Plans │ マ I	Default Sales Plan 🗸
Common			
	#	#	+
AUDIT HISTORY	CHANNEL PRICE LISTS	FIXTURES	SERIES



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.

🏜 Microsoft Dynamics CRM 🗸 📫 PRODUCT MANAG 🗸 Sales Plans 🗸 Default Sales Plan 🗸
SALES PLAN : INFORMATION
Default Sales Plan
Channel Price List Associated View 👻
🕂 ADD NEW CHANNEL PRIC 🛱 ADD EXISTING CHANNEL 🕞 BULK DELETE 📲 CHART PANE 👻 🗈 RUN REPORT 👻 🗐 EXPORT CHANNEL PRICE
✓ Name ↑ Channel Sales Plan On Sale Days B On Sale Hours B Off Sale Days B Off Sale Hours On Sale Date Off Sale Date

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

🏄 🗸 🏦 New C	hannel Price		\oplus	System Administ go	0	۵	?
🕞 SAVE 🛱 SAVE & C	CLOSE + NEW 🗐 FORM EDITOR						
CHANNEL PRICE LIST	: INFORMATION						
New Cha	annel Price List						
General							
Name *	1						
Channel		Variant Price List					
On Sale Date		Off Sale Date					
On Sale Days Before		On Sale Hours Before					
Off Sale Days Before		Off Sale Hours Before					
Activity Start Date		Activity End Date					
Marketing List		Priority Provider					
Discount Percent		Max Quantity					
Discount Category		Discount Rounding					

- 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 <u>Variant Price List</u> 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 <u>Variant Price List</u> and <u>Sales Plan</u> 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 <u>Setup</u> has taken place.

2. MEAL DEAL CONFIGURATIONS

 The Meal Deal consists of a specific product(s) but no specific variant(s)

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 2. The Meal Deal is a combination of products with any Variant and product specific Variants

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. 3. The Meal Deal consists of products and specific Variants of all products

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 <u>Variant (Deal) Type</u>. The diagram below demonstrates how this type of Meal Deal can be created.



these have not been created, see <u>Section 1</u> 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**.

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K BOOKINGS	C	C VENUE MANAGEMENT	MEMBERSHIP	PROMOTIONS



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

Microsoft Dynamics CRM	·	PRODUCT MA	NAG.	🗸 🛛 Series 🛛 🗸			
Unknown48			_				
Image: Analysis categories ≚	BOOKABL	E PRODUCTS	¥	BOOKABLE PRODUCT	×	H DISPATCH BATCHES	×

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:

🊈 Microsoft Dynam	nic	cs CRM 🗸 👘	PRODUCT MA	NAG 🗸	Bookable Product	s 🗸	New Bookable Prod			
🖬 SAVE 🗳 SAVE & C	CLC	SE 🕂 NEW 💷	FORM EDITOR							
BOOKABLE PRODUCT : INFORMATION										
New Boc	٦l	ahla Dr	oduct							
INEW DUC	יו		ouuci							
General										
General										
Name *		1								
Translated Name										
Description										
Cross Sell Product De										
Туре		Stock						Sequence	-	
Availability								Beneficiary Requirem	Not Required	
Is Course								Capacity	-	
Ask Booking Questio		No						Report Category	-	
Is Single Booking		No						Code		
Print Vouchers		No						Available Offline	No	
Is Anonymous		No						Mandatory Variants	No	
Match Sit Anywhere		No						Voucher Valid Days		
VAT code								Ticket booking fee	No	
Payable By								Fixture Coupon Proci	-	
External Product ID								Direct Debit Mandate	No	
Meal deal		No								
Purchaser Price For A		Yes								
D. C										
Referring Entities										
Bookable Resource								Category	-	
Series 🔒								Product Calendar		

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 <u>Variant</u>, 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.



Variants & Pricing				
	Code	Not for Sale	Mandatory Variant	···· v
	Code	NOT IOF SHE	wandatory variant	
Meal Deal (Deal)				

- h) Next, the price of the product must be entered, to do this:
 - i. Select the relevant Meal Deal <u>Variant Price List</u> from the drop down at the right hand side of the Variants & Pricing section (highlighted below).

Variants & Pricing				
	6-4-	Nat for Cala		···· v
Meal Deal (Deal)	Code	Not for Sale	Mandatory Variant	

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.

Variants & Pricing					
				Meal Deals	~
	Code	Not for Sale	Mandatory Variant	Peak Price	Off Peak Price
Meal Deal (Deal)					

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	Туре	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 <u>Variant Type</u>		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 <u>Variant Price Lists</u>		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 <u>Channel Price List</u>		The channel price list should be linked to the <u>Sales Plan type of Other.</u> The Channel Price List should link the Channels to the <u>Variant Price List</u> 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 <u>Stock type Bookable</u> <u>Product</u>		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 <u>Variant Type (Deal)</u> is listed.
7. Assigned prices to the Bookable Product		Prices should be added to an active <u>Variant</u> <u>Price List</u> 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.

						Cash Skim	Till Report	Open Till	LOCK	Logout	Home	Back
urrent Booki	ing Find Boo	king Find Sea	at Tabs Cust	omer Coupoi	n Cashless	Accounts Acc	cess Gate					
Carling (Each)	Carlsberg	Guinness	Ginger Beer	Guava juice	Pepsi (Each)	Randoms		Reference No Name		1	Jnit Qty I	Line
3.00	(Each) 3.00	(Each) 4.00	(Each) 1.51	(Each) 2.00	1.26	(Each) 2.00		Hume			sine Qey i	Line
Polos (Each) 2.00	Chocolate Bar (Each) 2.00	Kit Kat (Each) 0.50	Snickers (Each) 1.00	Twix (Each) 0.50	Chicken Pie (Each) 2.00	Hotdog (Each 1.00)					
Pizza Slice (Each) 4.00	Steak Pie (Each) 2.00	Vegetable Pie (Each) 2.00	A Burger and a Pint of Fosters Meal Deal (Deal)	A pint of Carling with food Meal Deal (Deal) 5 00	Pie, Pint and Chocolate Mer Deal (Deal) 5.00	ai	-					
						_						
								Discount	And Promos		Beneficiaries	Speed Chec
								Discount	And Promos	Add Comment	Beneficiaries Print Wizard	Speed Chec Promotic

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.

Carling (Each) 3.00	Carlsberg (Each) 3.00	Guinness (Each) 4.00	Ginger Beer (Each) 1.51	Guava juice (Each) 2.00	Pepsi (Each) 1.26	Randoms (Each) 2.00
Polos (Each) 2.00	Chocolate Bar (Each) 2.00	Kit Kat (Each) 0.50	Snickers (Each) 1.00	Twix (Each) 0.50	Chicken Pie (Each) 2.00	Hotdog (Each) 1.00
Pizza Slice (Each) 4.00	Steak Pie (Each) 2.00	Vegetable Pie (Each) 2.00	A Burger and a Pint of Fosters Meal Deal (Deal)	A pint of Carling with food Meal Deal (Deal) 5.00	Pie, Pint and Chocolate Meal Deal (Deal) 5.00	



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.

– Customer –					Select	Customer
Reference No	.:					
Name		Unit	Qty	Line		
A Burger and a Deal (Deal)	Pint of Fosters Meal	£5.00	1	£5.00	х	Reduce
Discount	And Promos		Be	eneficiaries	Speed	l Checkout
Total Price Total to pay	£5.00 £5.00	Add Commen	t Pr	int Wizard	Pro	omotion
		Close	Pr	int Tickets	Add	Payment

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 <u>Product Modifier</u> and <u>Option</u> <u>Variants</u> attached to it.

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



The <u>Setup</u> 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 <u>Section 1</u> 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.

Microsoft Dynamics CRM	 ↑ 	PRODUCT MANA	AG ~	Series 🗸			
Unknown48							
↔ ANALYSIS CATEGORIES	H BOOKABLE	PRODUCTS	++ BOOH	ABLE PRODUCT	×	H DISPATCH BATCHES	×

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:

🊈 Microsoft Dynam	nic	cs CRM 🗸 👘	PRODUCT MA	NAG 🗸	Bookable Product	s 🗸	New Bookable Prod		
🖬 SAVE 🗳 SAVE & C	CLC	SE 🕂 NEW 💷	FORM EDITOR						
BOOKABLE PRODUCT	: 17	NFORMATION							
New Boc	٦l	ahla Dr	oduct						
INEW DUC	יו		ouuci						
General									
General									
Name *		1							
Translated Name									
Description									
Cross Sell Product De									
Туре		Stock						Sequence	-
Availability								Beneficiary Requirem	Not Required
Is Course								Capacity	-
Ask Booking Questio		No						Report Category	-
Is Single Booking		No						Code	
Print Vouchers		No						Available Offline	No
Is Anonymous		No						Mandatory Variants	No
Match Sit Anywhere		No						Voucher Valid Days	
VAT code								Ticket booking fee	No
Payable By								Fixture Coupon Proci	-
External Product ID								Direct Debit Mandate	No
Meal deal		No							
Purchaser Price For A		Yes							
D. C									
Referring Entities									
Bookable Resource								Category	-
Series 🔒								Product Calendar	

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 <u>Variant</u>, 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.

Variants & Pricing				
	Code	Not for Sale	Mandatory Variant	
 Meal Deal (Deal) Solution 				



- h) Next, the price of the product must be entered, to do this:
 - i. Select the relevant Meal Deal <u>Variant Price List</u> from the drop down at the right hand side of the Variants & Pricing section (highlighted below).

Variants & Pricing				
				···· v
Meal Deal (Deal)	Code	Not for Sale	Mandatory Variant	
v				

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.

Variants & Pricing					
				Meal Deals	~
	Code	Not for Sale	Mandatory Variant	Peak Price	Off Peak Price
Meal Deal (Deal)					

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	Туре	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**.

		Dashboards 🗸	\oplus	go System Administ 📿 🏚 ?	
<	<u>گ</u>	<u>a</u>	a and a second s	A	<u>ه</u> >
	BOOKINGS	PRODUCT MANAGEM	VENUE MANAGEMENT	MEMBERSHIP	PROMOTIONS



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

Microsoft Dynamics CRM	 ↑ 	PRODUCT MANA	AG ~	Series 🗸			
Unknown48							
↔ ANALYSIS CATEGORIES	H BOOKABLE	PRODUCTS	++ BOOH	ABLE PRODUCT	×	H DISPATCH BATCHES	×

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:

🚈 Microsoft Dynan	nic	cs CRM 🗸 📫	PRODUCT MANAG V	Bookable Products 🗸	New Bookable Prod					
🕞 SAVE 🗳 SAVE & C	CLC	DSE 🕂 NEW 🗉 FC	DRM EDITOR							
BOOKABLE PRODUCT : INFORMATION										
New Bookable Product										
General										
Name *		1								
Translated Name										
Description										
Cross Sell Product De										
Туре		Stock				Sequence				
Availability						Beneficiary Requirem	Not Required			
Is Course						Capacity				
Ask Booking Questio		No				Report Category				
Is Single Booking		No				Code				
Print Vouchers		No				Available Offline	No			
Is Anonymous		No				Mandatory Variants	No			
Match Sit Anywhere		No				Voucher Valid Days				
VAT code						Ticket booking fee	No			
Payable By						Fixture Coupon Prod				
External Product ID						Direct Debit Mandate	No			
Meal deal		No								
Purchaser Price For A		Yes								
Referring Entities										
Bookable Resource						Category				
Series 🔒						Product Calendar				

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.

Channe	ls					
□ F&B	PORTAL	POS	POS Stadium	U WEB	Web Stadium	

- iii. Select **Save** on the ribbon.
- I) 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 <u>Variant</u>, 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.

Variants & Pricing				
				···· v
	Code	Not for Sale	Mandatory Variant	
Hot Dog (Each)				



- m) Next, the price of the product must be entered, to do this:
 - i. Select the relevant Meal Deal <u>Variant Price List</u> from the drop down at the right hand side of the Variants & Pricing section (highlighted below).

Variants & Pricing				
	Code	Not for Sale	Mandatory Variant	
😑 Hot Dog (Each)				

- ii. The pricing value entered here should be the price $\pounds 0.00$ 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.

Variants & Pricing					
				Meal Deals	~
	Code	Not for Sale	Mandatory Variant	Peak Price	Off Peak Price
Hot Dog (Each)		\checkmark		0.00	0.00 ×

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	Туре	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 <u>Step 2</u> 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 <u>Step 2</u> 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	Туре	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 <u>Meal Deal Options</u>, for example a burger or hot dog to the <u>Meal Deal</u> 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 <u>Step 1 of Section 2.2</u>) 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**.

4	Microsoft Dynamics CRM	✓	🗸 🛛 Bookable Products 🛛 🗸	A Pint of Carling wit 🗸		Ð
<	PAYMENT METHODS	PRODUCT VARIANT LOCA	CHANNELS	PARENT CROSS SELL PRO	HILD CROSS SELL PROD	H BOOKABLE PRODUCT MO

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.



i Microsoft Dynamics CRM 🗸 🍵 PRODUCT MANAG 👻 Bookable Products 🗸 🛛 A Pint of Carling wit 🗸	🕀 Create	System Administ Sports		\$	
			\uparrow	\downarrow	
BOOKABLE PRODUCT : INFORMATION					
A Pint of Carling with Food Meal Deal					
Bookable Product Modifier Associ 👻	s	earch for records			
🛱 ADD EXISTING BOOKABLE 🔓 BULK DELETE 📲 CHART PANE * 🕑 RUN REPORT * 📲 EXPORT BOOKABLE PROD					
Name 🛧 Created On				T	
🖓 Cold Snacks					2
16/06/2014 12:39 Iop Drinks 16/06/2014 12:42				-	
↓ League Badge 100/12/05/15119					
Players Name 10/07/2015 11:29					
Shirt Number 10/01/2015 11:02					
Transfers 13/06/2014 11:06					
Warm Snack 16/06/2014 1232				1	_
7 results					- 1

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

🊈 🧹 🏦 prod	UCT MANAG 🗸 Bookable Product	│ ✔ New Bookable Prod	\oplus	System Administ Sports	\sim	۵	?
🔒 SAVE 🛱 SAVE & C	CLOSE 🕂 NEW 🗐 FORM EDITOR						
BOOKABLE PRODUCT	MODIFIER : INFORMATION						
New Boo	okable Product Mo	difier					
General							
Name *		Owner *	System Adminis	trator			
Product *	A Pint of Carling with Food Meal Deal	Type *					
ls required	No	Default Value					
Modifier options		Allow custom option	No				
Validation expression							
Validation Error Mess							

- **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 <u>Step 3 of section 2.2.</u> 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	Туре	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**.

Microsoft Dynamics CRM 🗸	🗸 🏦 PRODUCT MANAG	👻 Bookable Product	✓ Carling Pint with Fo	v l	(System / Sports
Common							
Ê	Ê	4]		#	#	#	
ACTIVITIES	CLOSED ACTIVITIES	CONNECTIONS	AUDIT HISTORY	BOOKING PRODUCT MOD	BOOKABLE PRODUCTS	OPTION VARIANTS	

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

Microsoft Dynamics CR	KM 🗸 🏦 pro	DDUCT MANAG.	🗸 Bookable	Product 🛛 🗸	Carling Pint w
BOOKABLE PRODUCT MODIFIE Carling Pint		bd			
Product Variant	Associated	View ~			
ADD EXISTING PRODUCT	🛱 BULK DELETE 📲	🖡 CHART PANE 🔻	🖹 RUN REPORT 🔻	🕼 EXPORT PROL	DUCT VARIA
Name 🛧	Variant Type	Code	Not for Sale		

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 <u>Step 2 of section 2.2</u>. 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.

BOOKABLE PRODUCT MODIFIER : INFORMATION Carling Pint with Food	
Product Variant Associated View -	Search for records
🕼 ADD EXISTING PRODUCT 🕼 BULK DELETE 📲 CHART PANE 👻 🖻 RUN REPORT 👻 📵 EXPORT PRODUCT VARIA	
Name 🛧 Variant Type Code Not for Sale	Ŧ
	٩



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.

Microsoft Dynamics CR	KM 🗸 📫 product manag	🗸 🛛 Bookable F	Product 🛛 🗸	Carling Pint with Fo
BOOKABLE PRODUCT MODIFI				
Carling Pint	with food			
Product Variant	Associated View 🕤			
🛱 ADD EXISTING PRODUCT	🕏 BULK DELETE 📲 CHART PANE 🔻	🖹 RUN REPORT 🔻	🕼 EXPORT PROD	UCT VARIA
✓ Name ↑	Variant Type Code	Not for Sale		
 Hot Dog (Each)	Each	No		

MEAL DEAL 2: OVERVIEW

Task	Completed?	Comments
1. Created the <u>Deal Variant Type</u>		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 <u>Variant Price Lists</u>		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 <u>Channel Price List</u>		The channel price list should be linked to the <u>Sales Plan type of Other.</u>
		The Channel Price List should link the Channels to the <u>Variant Price List</u> 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		Ensure the Bookable Product Type is set as Stock
Bookable Product. i.e. A pint of Carling with food Meal Deal		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 <u>Variant Type (Deal)</u> is listed
		Enter the price of the Meal Deal using an active <u>Variant Price List</u> that has been linked to a <u>Channel Price List.</u>

5. Created the <u>Bookable Products</u> <u>that are to be part of the Meal</u> <u>Deal.</u> 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 <u>Variant Type (Each)</u> is listed Ensure the price of the product entered is £0.00 and that an active <u>Variant Price List</u> has been linked to a <u>Channel Price List</u> . Tick the Not for Sale flag in the Variant and Pricing section
6. Created the <u>Bookable Product to</u> <u>link to the Bookable Product</u> <u>Modifier</u> . 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 <u>Variant Type (Deal)</u> is listed Ensure the price of the product entered is £0.00 and that an active <u>Variant Price List</u> has been linked to a <u>Channel Price List</u> . Tick the Not for Sale flag in the Variant and Pricing section
7. Created the <u>Bookable Product</u> <u>Modifier</u> 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 <u>Option Variants</u> 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.

1, SH1	ntest					Cash Skim	Till Report	Open Till	LOCK	Logout	Home	Back
urrent Book	ing Find Boo	king Find Sea	at Tabs Cust	omer Coupoi	n Cashless A	ccounts Acce	ess Gate					
Carling (Each) 3.00	Carlsberg (Each) 3.00	Guinness (Each) 4.00	Ginger Beer (Each) 1.51	Guava juice (Each) 2.00	Pepsi (Each) 1.26	Randoms (Each) 2.00		Reference No Name		ι	Init Qty I	Line
Polos (Each) 2.00	Chocolate Bar (Each) 2.00	Kit Kat (Each) 0.50	Snickers (Each) 1.00	Twix (Each) 0.50	Chicken Pie (Each) 2.00	Hotdog (Each) 1.00						
Pizza Slice (Each) 4.00	Steak Pie (Each) 2.00	Vegetable Pie (Each) 2.00	A Burger and a Pint of Fosters Meal Deal (Deal) 5 on	A pint of Carling with food Meal Deal (Deal)	Pie, Pint and Chocolate Meal Deal (Deal) 5.00							
								Discount	And Promos		Beneficiaries	Speed Chec
										Add Comment	Print Wizard	
										Add Comment	Philic Wizaru	Promotio

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.

Carling (Each) 3.00	Carlsberg (Each) 3.00	Guinness (Each) 4.00	Ginger Beer (Each) 1.51	Guava juice (Each) 2.00	Pepsi (Each) 1.26	Randoms (Each) 2.00
Polos (Each) 2.00	Chocolate Bar (Each) 2.00	Kit Kat (Each) 0.50	Snickers (Each) 1.00	Twix (Each) 0.50	Chicken Pie (Each) 2.00	Hotdog (Each) 1.00
Pizza Slice (Each) 4.00	Steak Pie (Each) 2.00	Vegetable Pie (Each) 2.00	A Burger and a Pint of Fosters Meal Deal (Deal)	A pint of Carling with food Meal Deal (Deal)	Pie, Pint and Chocolate Meal Deal (Deal) 5.00	

c) A Product Options dialogue will be displayed. Select the drop down to display the <u>Option variants</u> 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.


. 🙆	Product Options – 🗖 🗙								
A pint of Carling with food Meal	Deal (Deal)								
Carling pint with food:	Hotdog (Each)		Ŷ						
	Steak pie (Each)			Т					
Cancel	Hotdog (Each)								

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

4		Product Options – 🗖							
A pir	nt of Carling with food Meal E	Deal (Deal)							
Carli	ing pint with food:	Hotdog (Each)		\$					
C	Cancel	Total:	£5.00	Add					

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

– Customer				Select	Customer
Reference No.:					
Name	Unit	Qty	Line		
A pint of Carling with food Meal De (Deal)	eal £5.00	1	£5.00	~	Reduce
Carling pint with food: Hotdog (Ea	ch)			х	Reduce
Discount And Promos				Ber	eficiaries
Total to pay £5.00	Add Comm	ient	Print Wizard	d Pr	omotion
	Close		Print Ticket	s Add	Payment



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 <u>Setue</u> 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 <u>Section 1</u> 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.

Microsoft Dynamics CRM	 ↑ 	PRODUCT MANA	AG ~	Series 🗸			
Unknown48							
↔ ANALYSIS CATEGORIES	H BOOKABLE	PRODUCTS	++ BOOH	ABLE PRODUCT	×	H DISPATCH BATCHES	×

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:

🊈 Microsoft Dynam	nic	cs CRM 🗸 📫 pr	RODUCT MANAG 🗸	Bookable Products 🗸	New Bookable Prod		
🖬 SAVE 🛱 SAVE & C	CLC	DSE 🕂 NEW 💷 FORM	EDITOR				
BOOKABLE PRODUCT	: 17	VFORMATION					
New Roc	h	kable Prod	luct				
INCW DOC			act				
General							
General							
Name *							
Translated Name							
Description							
Cross Sell Product De							
Туре		Stock				Sequence	
Availability						Beneficiary Requirem	Not Required
Is Course						Capacity	
Ask Booking Questio		No				Report Category	
Is Single Booking		No				Code	
Print Vouchers		No				Available Offline	No
Is Anonymous		No				Mandatory Variants	No
Match Sit Anywhere		No				Voucher Valid Days	
VAT code						Ticket booking fee	No
Payable By						Fixture Coupon Prod	
External Product ID						Direct Debit Mandate	No
Meal deal		No					
Purchaser Price For A		Yes					
Referring Entities							
Bookable Resource						Category	
Series 🔒						Product Calendar	

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 <u>Variant</u>, 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.



Variants & Pricing				
				···· v
	Code	Not for Sale	Mandatory Variant	
Meal Deal (Deal)				
✓ ○				

- h) Next, the price of the product must be entered, to do this:
 - i. Select the relevant Meal Deal <u>Variant Price List</u> from the drop down at the right hand side of the Variants & Pricing section (highlighted below).

Variants & Pricing				
	Code	Not for Sale	Mandatory Variant	···· ··
Meal Deal (Deal)				

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.

Variants & Pricing					
				Meal Deals	~
	Code	Not for Sale	Mandatory Variant	Peak Price	Off Peak Price
G Meal Deal (Deal)					
✓ ۞					

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	Туре	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**.

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	BOOKINGS	PRODUCT MANAGEM	VENUE MANAGEMENT	MEMBERSHIP	PROMOTIONS

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

Microsoft Dynamics CRM	 ↑ 	PRODUCT MANA	\G ∽	Series 🗸			
Unknown48							
ANALYSIS CATEGORIES	BOOKABLE		++ воо	KABLE PRODUCT	¥	H DISPATCH BATCHES	≚

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:

雄 Microsoft Dynam	nics C	RM 🗸 👘	PRODUCT	MANAG 🗸	Bookable Prod	ucts 🗸	New Bookable Prod			
🗔 SAVE 🛱 SAVE & CI	LOSE	+ NEW 🗔	FORM EDITOR							
BOOKABLE PRODUCT : INFORMATION										
New Boo	ka	hle Pr	oduct							
TACW DOO	nu		ouuci							
General										
Name *										
Translated Name										
Description Cross Sell Product D										
Type	Stock							Sequence		
Availability								Beneficiary Requirem	Not Required	
· · · · ·								Capacity		
Ask Booking Questio	No							Report Category		
Is Single Booking	No							Code		
Print Vouchers	No							Available Offline	No	
Is Anonymous	No							Mandatory Variants	No	
Match Sit Anywhere	No							Voucher Valid Days		
VAT code								Ticket booking fee	No	
Payable By								Fixture Coupon Proci		
External Product ID								Direct Debit Mandata	No	
Meal deal	No									
Purchaser Price For A	Yes									
Referring Entities										
Bookable Resource								Category		
Series 🔒								Product Calendar		



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.

Chann	els					
🗌 F&B		POS	POS Stadium	U WEB	UWeb Stadium	

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 <u>Variant</u>, 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.

/ariants & Pricing				
				🗸
	Code	Not for Sale	Mandatory Variant	
Chocolate (Each)				
Each 🗸 📀				

- h) Next, the price of the product must be entered, to do this:
 - i. Select the relevant Meal Deal <u>Variant Price List</u> from the drop down at the right hand side of the Variants & Pricing section (highlighted below).

Variants & Pricing				
				🗸
	Code	Not for Sale	Mandatory Variant	
Chocolate (Each)				
Each 🗸 📀				

- 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.

Variants & Pricing					
				Meal Deals	~
	Code	Not for Sale	Mandatory Variant	Peak Price	Off Peak Price
Chocolate (Each)		\checkmark		0.00	0.00 ×
Each 🗸 🛇					

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	Туре	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 <u>Step 4</u>.

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**.

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<	6	۵.	a -	A	a.	>
	BOOKINGS	PRODUCT MANAGEM	VENUE MANAGEMENT	MEMBERSHIP	PROMOTIONS	

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

Microsoft Dynamics	CRM	~ 🟦	PRODUCT N	IANAG	i v	Series 🗸			
Unknown48									
ANALYSIS CATEGORIES	×	H BOOKABL	E PRODUCTS	×	# BOOR	(ABLE PRODUCT	≚	H DISPATCH BATCHES	≚



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:

👍 Microsoft Dynam	nic	is CRM 🗸 📫 🕴	PRODUCT MANAG 🗸	Bookable Products 🗸	New Bookable Prod				
🕞 SAVE 🗳 SAVE & C	:LO	SE 🕂 NEW 💷 FC	ORM EDITOR						
BOOKABLE PRODUCT	: 11	FORMATION							
New Boc	١k	cable Pro	oduct						
11011 200			addet						
General									
Name*		1							
Translated Name									
Description Cross Sell Product De		-							
Type		Stock				Sequence			
Availability						Beneficiary Requirem	Not Required		
Is Course		-				Capacity			
Ask Booking Questio		No				Report Category			
Is Single Booking		No				Code			
Print Vouchers	1	No				Available Offline	No		
Is Anonymous	1	No				Mandatory Variants	No		
Match Sit Anywhere	1	No				Voucher Valid Days			
VAT code		-				Ticket booking fee	No		
Payable By		-				Fixture Coupon Prod			
External Product ID						Direct Debit Mandate	No		
Meal deal	1	No							
Purchaser Price For A	1	/es							
Referring Entities									
Bookable Resource						Category			
Series 🔒						Product Calendar	-		

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.

Chann	els					
□ F&B	PORTAL	POS	POS Stadium	WEB	UWeb Stadium	

- 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 <u>Variant</u>, 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.

Variants & Pricing				
				🗸
	Code	Not for Sale	Mandatory Variant	
Mars bar (Each)				

- h) Next, the price of the product must be entered, to do this:
 - i. Select the relevant <u>Variant Price List</u> from the drop down at the right hand side of the Variants & Pricing section (highlighted below).

Variants & Pricing				
				🗸
	Code	Not for Sale	Mandatory Variant	
Mars bar (Each)				



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.

Variants & Pricing					
				Sport- F&B	~
	Code	Not for Sale	Mandatory Variant	Peak Price	Off Peak Price
Mars bar (Each)				1.00	1.00
✓ ۞					

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	Туре	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 <u>Step 2</u>, for example Pie, Pint and Chocolate to the Meal Deal <u>(Step1)</u>.

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 <u>Step 1 of Section 2.3.</u>
- 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**.

Microsoft Dynamics CRN	/I → 📫 PRODUCT MANAG	5 🗸 🛛 Bookable Products 🛛 🗸	Pie, Pint and Chocol 🗸		Ð
<	H PRODUCT VARIANT LOCA	++ CHANNELS	H PARENT CROSS SELL PRO	HILD CROSS SELL PROD	H BOOKABLE PRODUCT MO

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

// Microsoft Dynamics CRM ↓	🏦 🕴 PRODUCT MANAG 🗸	Bookable Pr	oducts 🗸	Pie, Pint and Chocol
BOOKABLE PRODUCT : INFORMATION Pie, Pint and Ch		Deal		
Bookable Product M	1odifier Associ 👻			
🛃 ADD EXISTING BOOKABLE	.K DELETE 📲 CHART PANE 👻 🗈	RUN REPORT 🔻	🕼 EXPORT BO	OKABLE PROD
✓ Name ↑	Created On			

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

M Microsoft Dynamics CRM 🗸 🏠 PRODUCT MANAG 🗸 Bookable Products 🗸 Pie, Pint and Chocol 🗸 🕀 Create	System Administ Sports	💛 🗘 ?
		21
BOOKABLE PRODUCT : INFORMATION		
Pie, Pint and Chocolate Meal Deal		
Bookable Product Modifier Associ *	Search for records	Q
😰 ADD EXISTING BOOKABLE 🖟 BULK DELETE 📲 CHART PANE 🐐 🕑 RUN REPORT 👻 📵 EXPORT BOOKABLE PROD		
✓ Name ↑ Created On		T 0
Dinis.		Q
U Dhnis 10/06/2014 12:42		^
Lague Bage 1207/02151119		
By Reyers Name 12/01/2015 11:29		
Shirt Number 120/0215 11:02		
(a) Transfers 15/06/2014 11:06		
Warm Snack 18/06/2014 1232		
Look Up More Records		~
8 results		+ New



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

🌆 🗸 🏦 prod	UCT MANAG 🗸 Bookable Product	 New Bookable Prod 	\oplus	System Administ Sports	ø	?
🔒 SAVE 🛱 SAVE & C	CLOSE 🕂 NEW 🗐 FORM EDITOR					
	modifier : INFORMATION Kable Product Mod	difier				
General						
Name *		Owner*	🌡 System Adminis	strator		
Product *	A Pint of Carling with Food Meal Deal	Type *				
ls required	No	Default Value				
Modifier options		Allow custom option	No			
Validation expression						
Validation Error Mess						

- 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 <u>Step 2 of section 2.3</u>. 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	Туре	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 <u>Step 3 of section 2.3</u> 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**.

4	Microsoft Dynamics CRM	🗸 🏦 PRODUCT MANA	G 🗸 Bookable Product	🗸 Chocolate 🗸		(-		System A Sports
Γ	Common							
	Ŝ	Ê,	4]		Ŧ	Ŧ	#	
	ACTIVITIES	CLOSED ACTIVITIES	CONNECTIONS	AUDIT HISTORY	BOOKING PRODUCT MOD	BOOKABLE PRODUCTS	OPTION VARIANTS	

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

Microsoft Dynamics CR	M 🗸 🔒 📋	PRODUCT MANAG	🗸 🛛 Bookable F	Product 🛛 🗸	Chocolate 🗸
bookable product modifie Chocolate	R : INFORMATIO	Ν			
Product Variant	Associate	ed View 🖌			
ADD EXISTING PRODUCT	🔓 BULK DELETE	CHART PANE -	▶ RUN REPORT ▼	🕼 EXPORT PROD	UCT VARIA
✓ Name ↑	Variant Ty	pe Code	Not for Sale		

- 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 <u>Step 3 of section 2.3</u>, 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.

BOOKABLE PRODUCT MODIFIER : INFORMATION Carling Pint with Food Product Variant Associated View Search for records R BULK DELETE IL CHART PANE* IN REPORT * IL CHART PRODUCT VARIA	s.
Name ↑ Variant Type Code Not for Sale	

- 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 <u>Steps 4</u> and <u>Step 5</u> 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 <u>Step 4</u>, 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 <u>Deal Variant Types</u>		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 <u>Variant Price Lists</u>		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 <u>Channel Price List</u>		The channel price list should be linked to the Sales Plan type of Other. The Channel Price List should link the Channels to the <u>Variant Price List</u> 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 <u>Meal Deal</u>	Ensure the Bookable Product Type is set as Stock
Bookable Product. i.e. A Pie, Pint and Chocolate Meal Deal	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 <u>Variant Price List</u> that has been linked to a <u>Channel Price List.</u>
5. Created the <u>Bookable Products</u>	Ensure the Bookable Product Type is set as Stock
that are to be part of the Meal <u>Deal</u> . i.e. The food in the Meal Deal, for example; Pie, Pint and	Ensure a Category , for example Meal Deal, has been entered
Chocolate.	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 <u>Variant Price List</u> has been linked to a <u>Channel Price List.</u>
	Tick the Not for Sale flag in the Variant and Pricing section
6. Created the Bookable Product	Ensure the Bookable Product Type is set as Stock
<u>types</u> - A Bookable Product must be created for each specific type of product that is included in the Meal	Ensure a Category , for example Meal Deal, has been entered
Deal. For example the type of pies on offer could be steak, chicken or	Ensure the relevant Channel check boxes are ticked
vegetable	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 <u>Variant Price List</u> has been linked to a <u>Channel Price List</u> .
7. Created the <u>Bookable Product</u>	The Is required field must be set to No
Modifier to link the various Meal Deal options. For example linking	The Type field must be selected as Options
the Pie, Pint and Chocolate to the Meal Deal itself.	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 <u>Option Variants</u> 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.

1, SH1	ntest					Cash Skim	Till Report	Open Till	LOCK	Logout	Home	Back
urrent Book	ing Find Boo	king Find Sea	at Tabs Cust	omer Coupo	n Cashless A	ccounts Acce	ess Gate					
Carling (Each) 3.00	Carlsberg (Each) 3.00	Guinness (Each) 4.00	Ginger Beer (Each) 1.51	Guava juice (Each) 2.00	Pepsi (Each) 1.26	Randoms (Each) 2.00		Reference No Name		ι	Init Qty I	ine
Polos (Each) 2.00	Chocolate Bar (Each) 2.00	Kit Kat (Each) 0.50	Snickers (Each) 1.00	Twix (Each) 0.50	Chicken Pie (Each) 2.00	Hotdog (Each) 1.00						
Pizza Slice (Each) 4.00	Steak Pie (Each) 2.00	Vegetable Pie (Each) 2.00	A Burger and a Pint of Fosters Meal Deal (Deal) 5.00	A pint of Carling with food Meal Deal (Deal)	Pie, Pint and Chocolate Meal Deal (Deal) 5.00		•					
								Discount	And Promos		Beneficiaries	Speed Chec
										Add Comment	Print Wizard	Promotio

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

Carling (Each) 3.00	Carlsberg (Each) 3.00	Guinness (Each) 4.00	Ginger Beer (Each) 1.51	Guava juice (Each) 2.00	Pepsi (Each) 1.26	Randoms (Each) 2.00
Polos (Each) 2.00	Chocolate Bar (Each) 2.00	Kit Kat (Each) 0.50	Snickers (Each) 1.00	Twix (Each) 0.50	Chicken Pie (Each) 2.00	Hotdog (Each) 1.00
Pizza Slice (Each) 4.00	Steak Pie (Each) 2.00	Vegetable Pie (Each) 2.00	A Burger and a Pint of Fosters Meal Deal (Deal)	Carling with	Pie, Pint and Chocolate Meal Deal (Deal) 5.00	

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.



4	Product Options –	x
Pie, Pint and Chocolat	Meal Deal (Deal)	
Chocolate:	Kit Kat (Each)	
Pie:	Chicken Pie (Each)	
Pint:	Carling (Each)	
Cancel	Total: £5.00 Add	

- 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.

Customer				Select Customer
eference No.:				
Name Pie, Pint and Cho (Deal) Chocolate: Kit Ka Pie: Chicken Pie (Pint: Carling (Eac	colate Meal Deal t (Each), (Each),	Unit Q £5.00 1	2ty Line £5.00	X Reduce
Discount Ar	nd Promos			Beneficiaries
otal Price	nd Promos £5.00 £5.00	Add Comment	Print Wizard	



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 <u>Variant Types</u>, valid <u>Variant Price Lists</u> and <u>Sales</u> <u>Plan/Channel Price List</u> 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 <u>Step 2 of section 3</u>

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**.

4		Dashboards \mid 🗸	(System Administ Q 🔅 ? go	
<	1	đ	6	4	6 >
	BOOKINGS	PRODUCT MANAGEM	VENUE MANAGEMENT	MEMBERSHIP	PROMOTIONS

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

Microsoft Dynamics CRM	~ f	PRODUCT MAN	NAG	🗸 Series 🛛 🗸			
Unknown48			_				
ANALYSIS CATEGORIES	H) BOOKABL	E PRODUCTS	-	BOOKABLE PRODUCT	¥	H DISPATCH BATCHES	×

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

Microsoft Dynamics CRM - 💼 PRODUCT MANAG Bookable Products -									
🕂 NEW 🛅 DELETE 🖙 🛛 COPY A LINK 🗠	email a link 🔹	🖹 RUN REPORT 🔻	EXPORT TO EXCEL	🐌 IMPORT DATA 👻 🚥					
➡ Active Bookable Prod	ucts ×								
✓ Name ↑	Category	Code	apacity Product	Calenda Bookable Resour Duration					



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

🍐 Microsoft Dynam	cs CRM 🗸 🏦 PRODUCT MANAG 🗸 Bookable Products 🗸 New Bookable Prod		
🕞 SAVE 🗳 SAVE & C	SE ╋ NEW 国 FORM EDITOR		
BOOKABLE PRODUCT :			
New Boo	kable Product		
General			
Name *			
Translated Name			
Description	**		
Cross Sell Product De			
Туре	Stock	Sequence	
Availability	**	Beneficiary Requirem	Not Required
Is Course		Capacity	
Ask Booking Questio	No	Report Category	-
Is Single Booking	No	Code	
Print Vouchers	No	Available Offline	No
Is Anonymous	No	Mandatory Variants	No
Match Sit Anywhere	No	Voucher Valid Days	
VAT code		Ticket booking fee	No
Payable By	-	Fixture Coupon Prod	-
External Product ID	-	Direct Debit Mandate	No
Meal deal	No		
Purchaser Price For A	Yes		
Referring Entities			
Bookable Resource		Category	
Series		Product Calendar	
5010		rioduct calenual	

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 <u>Variant</u>, 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.

Variants & Pricing				
	Code	Not for Sale	Mandatory Variant	
Pizza Slice (Each)				
Each V 3				

- h) Next, the price of the product must be entered, to do this:
 - i. Select the relevant <u>Variant Price List</u> from the drop down at the right hand side of the Variants & Pricing section (highlighted below).

Variants & Pricing				
				🗸
	Code	Not for Sale	Mandatory Variant	
Pizza Slice (Each)				
Each V 3				

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.

Variants & Pricing					
				Sport- F&B	~
	Code	Not for Sale	Mandatory Variant	Peak Price	Off Peak Price
Pizza Slice (Each)				3.50	3.50 ×
Each 🗸 📀					



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 <u>Step 1 of section 3</u> (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**

4	Microsoft Dynamics CRM	V 🏦 PRODUCT MANAG	5 🗸 🛛 Bookable Products 🛛 🗸	 Pie, Pint and Chocol 			
<		FRODUCT VARIANT LOCA	++ CHANNELS	H PARENT CROSS SELL PRO	HILD CROSS SELL PROD	BOOKABLE PRODUCT MO	

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

¼ Microsoft Dynamics CRM ∽	PRODUCT MANAG.	🗸 🛛 Bookable P	Products \mid \checkmark Pie, Pint and Chocol \mid \checkmark
BOOKABLE PRODUCT : INFORMATION Pie, Pint and Cl	nocolate Me	al Deal	
Bookable Product M	Iodifier Associ	Ŷ	
🛱 ADD EXISTING BOOKABLE	K DELETE 📲 CHART PANE 🔻	🖹 RUN REPORT 🔻	EXPORT BOOKABLE PROD
✓ Name ↑	Created On		

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

🅼 Microsoft Dynamics CRM 🗸 👘 PRODUCT MANAG 🤟 Bookable Products 🗸 Pie, Pint and Chocol 🗸	① Create	System Administ Sports	• ¢: ?
			R
BOOKABLE PRODUCT : INFORMATION			
Pie, Pint and Chocolate Meal Deal			
Bookable Product Modifier Associ *		for records	٥
DOOKADIE PTOQUEL IVIOUITET ASSOEL * Ø add existing bookable ♀ bulk delete 📲 chart pane + 🕞 run report + 📵 export bookable prod	Search	tor records	ر
2 ADD EXISTING BOOKABLE L¥ BULK DELETE ₩ CHART PANE * L9 RUN REPORT * LE EXPORT BOOKABLE PROD			
✓ Name ↑ Created On			
Drinks 18/05/2014 1242			P
Regulation inter-			<u> </u>
Reversion Name 12/01/2015 11:29			
Shirt Number 12/01/2015 11:02			
A Transfers 15/06/2014 11:06			
Warm Snick 18/06/2014 12:22			
Look Up More Records			~
8 results			+ 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.

🌆 🗸 🏦 prod	UCT MANAG 👻 Bookable Product	│ マ New Bookable Prod	\oplus	System Administ Sports
日 SAVE 🛱 SAVE & (CLOSE 🕂 NEW 🗐 FORM EDITOR			
	modifier : INFORMATION Nable Product Mo	odifier		
General				
Name *		Owner*	🌡 System Admir	nistrator
Product *	Pie, Pint and Chocolate Meal Deal	Type *		
ls required	No	Default Value		
Modifier options		Allow custom option	No	
Validation expression				
Validation Error Mess				

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 <u>Step 1 of section 3</u> 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.

雄 Microsoft Dynan	nics CRM 🗸	n PRO	DUCT MAN	AG ~ Booka	able Product 🛛 🗸	Pizza Slice 🛛 🗸		
+ NEW 🔓 DEACTIVA	ATE <u> </u>	දුම් ASSIGN	🗘 SHARE	🖘 EMAIL A LINK	🔅 RUN WORKFLOW	•••		
BOOKABLE PRODUCT	MODIFIER : INFO	RMATION						
Pizza Slic	ce							
General								
Name *	Pizza Slice						Owner*	System Administrator
Product *	Pizza Slice						Type *	String
ls required	No						Default Value	
Modifier options	Meat Feast BBQ	Margherita					Allow custom option	No
Validation expression								
Validation Error Mess								

- 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.

Product Options – 🗆 🗙						
Pie, Pint and Chocolate Meal	Deal (Deal)					
Chocolate:	Kit Kat (Each)	~				
Pie:	Chicken Pie (Each)	~				
Pint:	Carling (Each)	Ŷ				
Optional extras						
Pizza Slice (+£3.00):		Ŷ				
Cancel	BBQ					
	Margherita					
	Meat Feast					

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 <u>Step 1 of Section 3</u> 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.

(Product Options -						
Pie, Pint and Chocolate Meal De	al (Deal)						
Chocolate:	Kit Kat (Each)	Ŷ					
Pie:	Chicken Pie (Each)	v					
Pint:	Carling (Each)	v					
Optional extras							
Pizza Slice (+£3.00):	[Custom option]	Ŷ					
Custom option:							
Cancel	Total:	£5.00 Add					



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 <u>Step 1 of Section 3</u> 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.

🌆 Microsoft Dyna	mics CRM 🗸 📫 PRODUCT MANAG 🗸 Bookable Product 🗸 New Bookable Prod		
🕞 SAVE 🗳 SAVE &	CLOSE + NEW I FORM EDITOR		
BOOKABLE PRODUC	T MODIFIER : INFORMATION		
New Bo	okable Product Modifier		
General			
Name *	Crisps	Owner *	System Administrator
Product *	Crisps	Type *	String
ls required	No	Default Value	
Modifier options	-	Allow custom option	No
Validation expression			
Validation Error Mess			

- 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.



8	Product Options						
Pie, Pint and Chocolate M	Pie, Pint and Chocolate Meal Deal (Deal)						
Chocolate:	Kit Kat (Each)	¥					
Pie:	Chicken Pie (Each)	~					
Pint:	Carling (Each)	~					
Optional extras							
Crisps (+£1.00):	Selected						
Cancel	Total: £6.00	Add					

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



5. Linked the Optional Extra to the Meal Deal as a <u>Bookable Product</u> <u>Modifier</u>	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 <u>Bookable Product</u> <u>Modifier type of String</u>	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 <u>Bookable Product</u> <u>type of String- Custom Option</u>	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 <u>Bookable Product</u> type of Bool	Ensure Is Required is set to No Ensure the Type selected is Bool

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:

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eal	BRQ			1	£6.00		£3.00	£9.00
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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 Chocolate: Kit Kat (Each) Pie: Chicken Pie (Each) Pint: Carling (Each)	@ £5.00
TOTAL (Inc. VAT) (VAT)	£5.00 £0.74
NET (PAID)	£5.00
VAT Number:8455 Sold subject to standard term	

End of Document