CRM 2015 USER GUIDES OVERVIEW

green4
SOLUTIONS

GO CRM 2015 Documentation – User Guides Available

Green 4 Solutions has a range of User Guides available to ensure that users can set up their CRM 2015 system appropriately to operate our functionality. This document gives an overview of each User Guide that is available, offering detail on what can be found within each of them.

The current readily available Green 4 User Guides are:

POS User Guides:

GO POS 3.7 User Guide

The Basics of CRM:

GO Basics of CRM 2015

Infrastructure Setup

GO CRM 2015 Infrastructure Setup User Guide V3.7

Venue Management

GO CRM 2015 Venue Management User Guide

Product and Booking Management

GO CRM 2015 Product Management User Guide V3.7.

GO CRM 2015 Booking Management User Guide

Promotions, Coupons and Vouchers

GO CRM 2015 Promotions, Coupons & Vouchers Setup User Guide

Delivery Options, Charges and Additional Charges

GO CRM 2015 Delivery Options, Charges & Additional Charges Setup User Guide V3.7

Gift Aid and Donations

GO CRM 2015 Gift Aid and Donations Setup User Guide

Retail

GO CRM 2015 Retail Setup User Guide

eCommunications

GO CRM 2015 E-Communications 5 & Flows User Guide

GO eCommunications Portal User Guide

GO eCommunications Ticketing Portal User Guide

Food and Beverage

GO CRM 2O15 Food and Beverage User Guide

GO CRM 2015 Food and Beverage- Meal Deals Setup User Guide.

Loyalty

GO CRM 2015 Loyalty Setup User Guide

Reporting and the Data Cube

GO Reporting and the Data Cube

Corporate Sales

GO CRM 2015 Corporate Sales Cycle User Guide

Multi-Currency & Cash Handling

GO CRM 2015 Multi-Currency & Cash Handing User Guide

User Guide:	Content:	Version:
	POS User Guide	
GO POS 3.7 User Guide	**How to use the POS for Version 3.7:** o Logging In o Booking Screen - Tab Headings - Menu - Shopping Cart o Making a Booking - Selecting the Ticket/ Product Option - Making a Booking for An Away Game - Cross Selling a Product at Time of Sale - Making a Booking for an Auto-Scheduled and a Scheduled Product - Selling a Donation Product Flagged for Gift Aid ▪ Gift Aid Mandatory and Completion of a Gift Aid Declaration ▪ Gift Aid Optional- Gift Aid Declarations Exist ▪ Cancelling a Declaration - Shopping Cart Donation Process - Entering the Customers Details ▪ Using a Barcode Scanner ▪ Using an Existing Customer ▪ Creating a New Customer - Entering the beneficiary details ▪ Capturing the Membership Numbers ▪ Adding a Family Member on the Edit Beneficiaries Screen - Taking Payments ▪ Edit Purchaser Dialog	3.7

- Select Delivery Address Dialog
- Additional Charges
- Payment Methods
- Direct Debit

- Using Tabs
  - Adding Items to a new Tab in the POS
  - Adding Items to an Existing Tab in the POS
  - Setting a Tab in the POS
  - Amending a Tab in the POS
- Speed Checkout
- Printing Tickets
- Batch Printing
- Shopping Cart- Additional Functionality
  - Deleting Items from the Shopping Cart
  - Adding Promotions
  - Adding Beneficiaries

- Managing Bookings
  - Finding a Booking
  - Amending a Bookings
  - Viewing a Bookings Details
  - Finding a Booking Using the Seat or Ticket Number
  - Searching for a Customer
    - Creating a New Customer
    - Putting a Customer On Hold
- Customer Details Dialog
    - Information Tab
    - Photo Tab
    - Booking History Tab
    - Reserved Seats Tab
    - Addresses Tab
    - On Hold Status Tab
    - Declaration Tab
  - Reservations
  - Capturing a Photo
    - Capturing a Photo on the Customer Details
    - Capturing a Photo on the Beneficiaries Screen

- Season Tickets
    - Upgrade
    - Move
    - Print fixture ticket
  - Using Season Ticket Buy-Back on the POS
    - Step 1: Offering a Ticket on the POS
    - Step 2: Reclaiming a Ticket on the POS
    - Upgrading and Moving an Offered-Up Season Ticket
  - Adding Fixtures to a Season Ticket Card on the POS
    - Adding a Fixture to a Season Ticket- Alternative Seat
    - Adding a Fixture to a Season Ticket- The Season Ticket Holders Usual Seat
    - Booking Details
  - Partial series sales
- Using the Access Gate
  - Validating a Ticket or Membership Number
  - Finding a Booking to Validate on the Access Gate
  - Amending a Booking and Editing the Beneficiaries in the Access Gate
- Miscellaneous Tasks
  - Locking the Terminal
  - Logging Out
  - Producing a Till Report
  - Opening the Till
  - Record a Cash Skim
  - Shopping Cart
  - Coupons
- Offline Working
  - Switching to Offline Mode
  - Switching to Online Mode

The Basics of CRM

Go Basics of CRM 2015	**A basic introduction to CRM 2015**	3.7

- Introduction
  - What is CRM?
  - Why CRM?
- Using CRM
  - Outlook Client Vs Internet Explorer Client
  - Outlook Client
  - Internet Explorer Client
- CRM Navigation
  - Work Area
  - Ribbon
  - Navigation Bar
  - Views
  - Forms
  - Saving in CRM
- Account and Contact management
  - What is a Contact?
  - What is an Account?
  - Building Relationships
- Activities
  - My Activities
- Advanced Find
  - Running an Advanced Find
  - Examples of Advanced Find Searches
  - Saving and Sharing an Advanced Find
- Marketing Lists
  - Creating a Marketing List
- Reporting
  - Accessing Reports
- Dashboards
  - Creating a new Dashboard

Infrastructure Set Up

Go CRM 2015 Infrastructure Setup User Guide V3.7	Contents	Version
	- Infrastructure- Overview - Company Details - Channels - Terminals - Payment Methods - Creating a Payment Method - Linking the Payment Method to the Channel - Payment Method Examples - Cash - Card - Invoice - Discount - Direct Debit - Payment Schedule - Payment Schedule Items - Viewing a Direct Debit Booking in CRM - First Payment & Direct Debit Mandate- CRM Set Up - Printers - Creating a Printer Record - Print Transforms - Booking Operators, Groups and Third Party Logins - Booking Operators - Third Party Logins and Operator Groups - The Access Gate - Step 1. Setting Up the Company Details - Step 2. Setting Up the Terminal - Step 3. Creating the Access Point and Attendance Zones - Step 4. Produce Zones - Offline Working - Set the Company Details to Allow Offline Working - Set Up Off Line Terminals - Set Up Off Line Payment Methods - Set Up Off Line Bookable Products	3.7

Go CRM 2015 Venue Management User Guide

- Examples: Using Sales Plans and Channel Price Lists to set up a Series and Fixtures
  - Example 1- Pricing schedule for Home Fixtures
  - Example 2- Season Ticket Pricing Using Sales Plans
  - Example 3- Season Ticket Pricing Using Sales Plans
  - Example 4- Season Ticket Pricing Using Sales Plans
- Setting Up Stock Type Bookable Products
  - Creating the Stock type Bookable Product
  - Stock Product On-Sale Check List
- Setting up Auto-Scheduled Type Bookable Product
  - Creating the Auto-Scheduled Type Bookable Product
  - Auto Scheduled Product On-Sale Check List
- Setting Up Scheduled Bookable Products
  - Step 1. Creating the Scheduled Type Bookable Product
  - Step 2. Schedule the Sessions
  - Scheduled Product On Sale Check List
- Setting Up Products as Memberships
  - Create the Membership Bookable Product
  - Membership On-Sale Check List
- Setting Up Pass Type Products
  - Creating the Pass Type Bookable Product
  - Pass type Products On-Sale Checklist
- Examples- Pass and Membership Settings Scenarios
  - Pass Product Scenarios
  - Membership Product Scenarios

- Functionality and Usage
  - Delayed Purchase
  - Upselling Products (Additional Products)

	- Setting Up Reserve Capacity (Reducing the Capacity)
	- Setting Up Negative Reserved Capacity (Increasing the Capacity)
	- Capturing a Photo for a Membership product
	- Membership Number Set Up
	- Entitlements
	   ▪ Entitlements and the Channel Price List
	   ▪ Entitlements and the Channels
	- Cross Selling Products
	   ▪ Setting up the Cross Sell Products
	   ▪ Setting the Channel for Cross Selling
	   ▪ Setting the Cross Sell Header and Sub Header
	- Setting Up the Season Ticket Buy-Back functionality in CRM
	   ▪ Step 1. Enabling Buy-back in the Company Details form
	   ▪ Step 2. Setting the Ticket Buy-Back Unoffered Period on the Channel
	   ▪ Step 3. Setting the Buy-Back on the Fixture
	   ▪ Step 4. Setting a Loyalty Increment to the Block
	   ▪ Season Ticket Buy-Back Report
	   ▪ Season Ticket Buy-Back Checklist
	- Adding Fixtures to Season Ticket Cards
	   ▪ Step 1. Setting the Company Details form
	   ▪ Step 2. Setting the Season Ticket (Series Type) Bookable Product form
	   ▪ Adding Fixtures to a Season Ticket Cards- CRM Setup Checklist
	- Placing a Customer on Hold
	   ▪ Creating On Hold Reasons in CRM
	   ▪ On Hold Audits in CRM
	   ▪ Contacts on Hold Report
	- Reservations
	   ▪ Step 1. Setting up the Reservation Payment Method	

- Step 2. Creating the Source Reservation Product
- Step 3. Creating the Target Reservation Product
- Step 4. Creating the Reservation
- Using Sequence Numbers with Reservations

- Allowing Ticket Moves/Upgrades
  - Step 1. Create the Series type Payment Method
  - Step 2. Set Channel to Accept Upgrades/Moves
  - Step 3. Set the Credit Percentage for Fixtures
  - Allowing Ticket Moves/Upgrades Checklist
- Printing Individual Fixture Tickets for a Series
  - Step 1. Set Channel to Accept Upgrades/Moves
  - Step 2. Create a Bookable Resource
  - Step 3. Add the Venue Configuration Blocks
  - Step 4. Create a new Bookable Product
  - Printing Individual Fixture Tickets for a Series Checklist
- Allowing Partial Series Sales
  - Step 1. Allow Partial Series on the Channel
  - Step 2. Set Company Details to Accept Coupons
  - Step 3. Set up the Coupon Category
  - Step 4. Set up the Coupon Type
  - Step 5. Creating the Coupon Product
  - Step 6. Create the Bookable Product
  - Step 7. Update the Series Product
  - Allowing Partial Series Sales Checklist
- Priority Providers
  - Priority Provider CRM Setup
  - Step 1. Create the Priority Provider

	▪ Step 2. Associate the Priority Provider to one or more Channel Price Lists ▪ Priority Providers on the POS o Miscellaneous ▪ The Bulk Set Up of Many Products ▪ Set up for Multi Lingual using the Translation Field ▪ Product Calendars ▪ Adding an Image to a Bookable Product	

- Booking Management Introduction
- Finding a Booking
  - Searching for a Booking using the Booking Reference
  - Searching for a Booking that is linked to a Contact
- Booking Form
  - Summary
  - Discount
  - Payment
  - Delivery Address
  - Ticket Collection
  - Operation
  - Linked Booking
- Related Items
  - Booking Payments
  - Booking Products
  - Booking Tickets
  - Seat Allocations

Go CRM 2015 Promotions, Coupons & Vouchers Setup User Guide

- Step 3. Create the Voucher type Bookable Product
    - Example of a Voucher type Bookable Product Record Created
- Step 4. Create the Voucher Payment Method
    - Adding the Payment Method to the Channels
    - Example of a Coupon Payment Method Record Created
- Step 5. Reviewing the Voucher Availability in CRM
- Voucher Check List

Delivery Options, Charges and Additional Charges

Go CRM 2015 Delivery Options, Charges & Additional Charges Setup User Guide V3.7	- Introduction - Setting Up the Delivery Options on the Channel - Delivery Option type Bookable Products - Example of Delivery Type Option type Bookable Product - Bookable Product Delivery Option Requirement - Print at Home Delivery option - Step 1. Create the Print at Home Delivery Option Product - Step 2. Setting Print at Home on the Channel - Step 3. Setting Print at Home for the Venue - Additional Charges - Setting the Channel for a Booking Charge - Setting up an Event (Fixture or Series) for an Additional Charge - Step 1. Create the Additional Charge on the Channel. - Step 2. Set the Bookable Product form - Step 3. Set the Fixture form - How Additional Charges are displayed in the POS - Using Multiple Addresses	3.7

GO CRM 2015 Gift Aid and Donations Setup User Guide

How to setup the Gift Aid and Donations functionality in CRM 2015.

- 1. Collecting Gift Aid
  - Step 1. Setting up a Charity and Associated Fund(s)
    - Setting up a Charity
    - Associating Funds to the Charity
    - Example of a Charity and Associated Fund
  - Step 2. Flag the Bookable Products for Gift Aid
  - Step 3. Declarations
  - Step 4. Creating Batches for Submission to HMRC
- 2. Donations
  - 2.1. Setting up a Donation Type Bookable Product
    - Using the Donations Type Bookable Product- End customer defines Donation Amount
    - Using Stock type Bookable Products- The Donation Amount is Predefined
  - 2.2. Shopping Basket Donation Process
  - 2.3. Payment Methods

3.7

Retail

GO CRM 2015 Retail Setup User Guide

	• Example of Stock Movement Record Created - Creating Stock Transaction • Example of Stock Transaction Record created - Product Variant Location Stock Levels o Picking and Dispatching - Booking Created - Dispatch Batch Created - Picking - Goods Dispatched	

GO CRM 2015 E-Communications 5 & Flows User Guide

User Guide on the latest E-Communication module from Go.

- eCommunications 5- An Introduction
- Communication Audiences
- Marketing Lists
- Communication Settings
- Comm Creator- Creating the Communication
    - Navigation
    - 1. General
        - Example of completed Comm Creator- General Section
    - 2. Audience
        - Example of a completed Comm Creator- Audience Section
    - 3. Set Up
        - Example of a completed Comm Creator- Set Up Section
    - 4. Layout
    - 5. Design
        - Structure and Content
        - Style
        - Editing
        - Previewing the Communication
        - Testing the Communication
        - Saving the Layout
        - Completing the Design Section
    - 6. Publish
    - 7. Review
        - Heatmaps
        - Statistics
        - Stopping a Communication
- Flows
    - 1. Creating a Comm Flow
        - Flow Example

	- 2. Tags and Product Groups o Appendix - 1. Configuration of message queue - 2. Link configuration - 3. Loyalty Auction bid made	
GO eCommunications Portal User Guide	o Introduction - Sign Up - Sign In - Temporary Access - Managing Subscriptions - Update Details	
GO eCommunications Ticketing Portal User Guide	o The eCommunication Ticketing Portal - Registering - Sin In - Forgotten Password - The 'Your Account' Section	
Food and Beverage		
GO CRM 2015 Food and Beverage User Guide	o Introduction o F&B Infrastructure - Setting up the F&B Channel - Setting up the Terminals - Setting up the Booking Operators - Setting up the Payment Methods o Tabs - Tab Channel Settings - Creating a Tab Payment Method • Linking the Tab type Payment Method to the F&B/Kiosk Channel - Adding Items to a new Tab in the POS - Adding Items to an Existing Tab in the POS - Making Payment for a Tab in the POS	

	- Amending a tab in the POS o Product Categories - Creating an Analysis Category o Setting Up F&B Products o F&B Stock Handling - Enabling Stock Handling- Channel Settings - Creating a Stock Movement • Example of Stock Movement Record created - Creating Stock Transaction • Example of Stock Transaction Record created - Product Variant Location Stock Levels o Purchasing Products when in Till Mode	
GO CRM 2015 Food and Beverage- Meal Deals Setup User Guide	o Introduction o Meal Deal Setup - Variant Type- Deal - Variant Price List • Example of Variant Price List Record Created - Sales Plans • Example of Sales Plans type Other Records Created - Channel Price Lists • Example of Channel Price List Record Created o Meal Deal Configurations - Meal Deal 1: Creating a Meal Deal that consist of a Specific Product but no Specific Variants • Step 1. Create the Meal Deal Bookable Product • Example of a Bookable Product Record Created for Meal Deal 1 • Meal Deal 1: Overview • Meal Deal 1 in the POS - Meal Deal 2: Creating a Meal Deal that consists of a combination of products with any Variants and Product specific Variants	3.7

	- Step 1. Create the Meal Deal Bookable Product - Example of a Bookable Product Created for Step 1 - Step 2. Create Bookable Products that are to be part of the Meal Deal - Example of Bookable Product Record Created for Step 2 - Step 3. Create a Bookable Product to link to the Bookable Product Modifier - Example of a Bookable Product Record Created for Step 3 - Step 4. Create Bookable Product Modifier - Example of a Bookable Product Modifier Record created for Step 4 - Step 5 Create the Option Variants - Meal Deal 2: Overview - Meal Deal 2 in the POS - Meal Deal 3. Creating a Meal Deal that consist of products and specific Variants of all Products - Step 1. Create the Meal Deals Bookable Product - Example of a Bookable Product Record created for Step 1 - Step 2. Create Bookable Products that are to be part of the Meal Deal - Example of a Bookable Product Records created for Step 2 - Step 3. Create the Bookable Product Types - Example of a Bookable Product Record Created for Step 3 - Step 4. Create Bookable Product Modifiers - Example of a Bookable Product Modifier Record Created for Step 4 - Step 5. Create the Option Variants	

Loyalty

GO CRM 2015 Loyalty Setup User Guide

            - Example of a Loyalty Level Records Created
    - Setting Up Loyalty Rules
        - Loyalty Transaction Source
        - Loyalty Point Rules
            - Examples of Loyalty Point Rules Records Created
        - Loyalty Bonus Rules
            - Example of Loyalty Bonus Rules Record Created
    - Loyalty Rewards
            - Adding an Image to a Loyalty Reward
            - Example of Loyalty Reward Records Created
    - Season Ticket Buy-Back. Loyalty Set Up in CRM
        - Step 1. Create Two Loyalty Transaction Source records
            - Example of Loyalty Transaction Source Records Created for Season Ticket Buy-Back
        - Step 2. Create Two Loyalty Point Rules
            - Example of Loyalty Point Rule Records Created for Season Ticket Buy-Back
        - Step 3. Run the Loyalty Transaction Generation process
        - Step 4. Creating a Loyalty Points Update
            - Example of Loyalty Point Update Record created for Season Ticket Buy-Back
    - Auction Items
            - Example of an Auction Item Record Created
    - Loyalty Codes
        - Example of a Loyalty Code Record Created

Reporting and the Data Cube

GO Reporting and the Data Cube

- Introduction
- Advanced Find
  - Running an Advanced Find
  - Examples of Advanced Find Searches
  - Saving and Sharing Advanced Find Searches
- Reporting
  - Accessing Reports
  - Setting the Filters of a Report
  - Generating a Report
- The Data Cube
  - Connecting to the Data Cube
  - Basic Concepts
  - Example Reports
    - Contacts in the Database
    - Viewing the data as a Chart
    - Contacts by Gender
    - Contacts by Age

	- Payments Taken per Channel - Ticket Sales per Fixture - Food and Beverage Sales per Terminal per Fixture (Number of Products) - Food and Beverage Sales per Terminal and Operator (Revenue)	
Corporate Sales		
GO CRM 2015 Corporate Sales Cycle User Guide	o Introduction - Application Layout - Forms o Contact and Account Management - Create a Contact - Create an Account - Building relationships between a Contact and Account • Creating a link between a Contact and an Account • Creating a link between an Account and a Primary Contact o Activities - Viewing your Activities - Viewing Open Activities linked to a Contact or an Account - Creating an Activity - Creating an Activity from a Contact or Account	3.7

	- Set regarding for an Activity - Assigning an Activity to another User - Completing an Activity - Breaking Contact and Account relationships o Creating Products o Creating Price Lists o Corporate Sales Cycle: Lead> Quote> Won Opportunity> Invoice - Step 1. Create a Lead - Step 2. Qualify the Lead and create the Opportunity - Step 3. Creating a Quote from an Opportunity - Step 4. Fulfilling an Order and creating an Invoice from an Order	
Multi-Currency & Cash Handling		
GO CRM 2015 Multi Currency & Cash Handling User Guide	**Describes the Setup and POS use of the Multi Currency & Cash Handling functionality** o Multi-Currency o Multi-Currency CRM Setup - Step 1. Create the Application Currency and Transaction Currency - Step 2. Set the Application Currencies to the Company Details - Step 3. Set the Change Paid Currency in the Company Details - Step 4. Variant Price Lists - Step 5. Payment Methods and Multi-Currency - Step 6. Booking Payments and Multi-Currency o The POS and Multi-Currency Use - Step 1. Selecting the Currency on the POS - Step 2. Completing Payment and receiving Change.	3.7

- Cash Handling
- Cash Handling CRM Setup
  - Step 1. Setting the Operator and Witness Pin in the Company Details
  - Step 2. Select the Booking Operators who can act as a Witness
  - Step 3. Setting the Till Pod Limit in the Channel.
  - Step 4. Cash Handling Session Report Print Transform.
  - Step 5. Terminal Float Sessions
- The POS and Cash Handling Use
  - Step 1. Starting a Terminal Float Session
  - Step 2. Till Loft/Till Drop/ Exchange
  - Step 3. Cash Handling Report
  - Step 4. Ending a Terminal Float Session
  - Till Pod Limit.

End of Document