



GREEN 4 INVOICING

green4
SOLUTIONS



CONTENTS

| | |
|--|---|
| Contents | 2 |
| About this Document | 2 |
| Non-Disclosure..... | 2 |
| Copyright | 2 |
| Document Control | 2 |
| Contact..... | 2 |
| Setting Up an Invoice type Payment Method in CRM..... | 3 |
| Step 1. Creating the Invoice type Payment Method | 3 |
| Step 2. Linking the Invoice type Payment Method to The CHannel | 4 |
| Invoicing on the POS..... | 6 |
| Invoices and Booking Payments within CRM | 7 |

ABOUT THIS DOCUMENT

This document has been prepared as a User Guide for creating an Invoice type Payment Method and using it on the POS.

NON-DISCLOSURE

All information contained in this document is to be treated as confidential information provided for the purpose of using Green 4 Solutions modules.

COPYRIGHT

© Green 4 Solutions Ltd

While every effort has been made to ensure the accuracy of the information contained in this publication, the information is supplied without representation or warranty of any kind, is subject to change without notice and does not represent a commitment on the part of Green 4 Solutions Limited. Green 4 Solutions Limited therefore, assumes no responsibility and shall have no liability, consequential or otherwise, of any kind arising from this material or any part thereof, or any supplementary materials subsequently issued by Green 4 Solutions Limited. Green 4 Solutions Limited has made every effort to ensure the accuracy of this material.

DOCUMENT CONTROL

| Version | Date | Change | Initials |
|---------|------------|------------------------|----------|
| V1.0 | 21/09/2015 | This is a new document | JW |

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

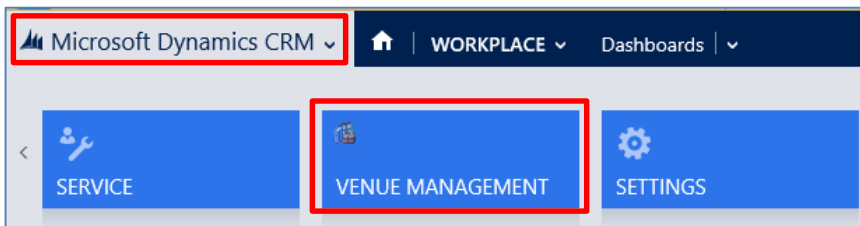
SETTING UP AN INVOICE TYPE PAYMENT METHOD IN CRM

The steps below describe how it is possible to set up an Invoice type Payment Method within CRM 2015 to use on the POS sales Channel.

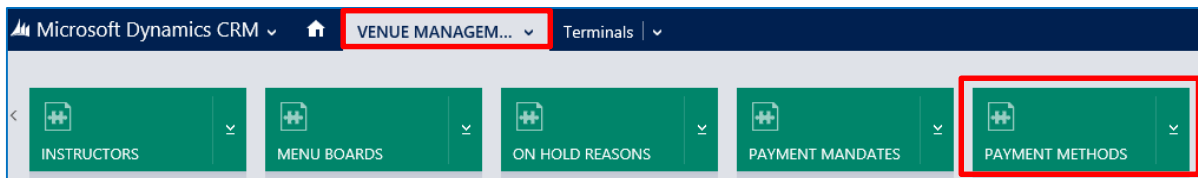
STEP 1. CREATING THE INVOICE TYPE PAYMENT METHOD

Firstly the Payment Method itself must be created, to do this with CRM 2015 open, complete the following:

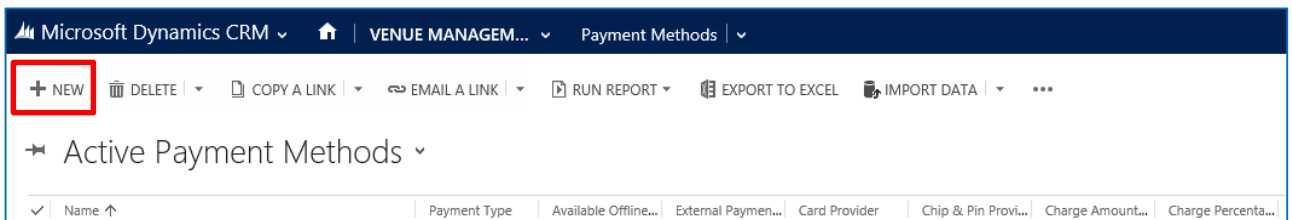
- a) Select the **Microsoft Dynamics CRM** tab in the navigation bar before scrolling across and choosing **Venue Management** from the drop down.



- b) Next select the **Venue Management** tab in the navigation bar and from the drop down choose **Payment Methods**.



- c) The Active Payment Methods view will be displayed, select **New** on the ribbon.



- d) A New Payment Method form will be displayed, complete the following details within the form:

Microsoft Dynamics CRM | VENUE MANAGEM... | Payment Methods | New Payment Meth...

SAVE SAVE & CLOSE + NEW FORM EDITOR

PAYMENT METHOD : INFORMATION

New Payment Method

General

| | | | |
|----------------------|----|----------------------|-----|
| Name * | -- | Description | -- |
| Payment Type | -- | Available Offline | No |
| External Payment ID | -- | Auto Pay | No |
| Set amount to bookin | No | Provider Version | -- |
| Sequence Number | -- | Redirect | -- |
| Post | -- | Collect Account Data | No |
| Error Redirect | -- | Auto Expiry Days | -- |
| Auto Advance Days | -- | Update Booking Statu | Yes |
| Code | -- | | |

Charges

| | | | |
|---------------|----|-------------------|----|
| Charge Amount | -- | Charge Percentage | -- |
|---------------|----|-------------------|----|

Tab Payment

| | |
|-----------------------|----|
| Tab Visibility Global | No |
|-----------------------|----|

Finance Payment

| | | | |
|------------------|----|------------------|----|
| Payment Schedule | -- | Requires Mandate | No |
|------------------|----|------------------|----|

Card

General

- **Name.** Enter a name for the Payment Method. The name will be displayed on the Channel when the payment is being made, for example Invoice.
- **Payment Type.** Use the drop-down list to select **Invoice**.

e) Once the details are correct, select **Save** on the ribbon.

STEP 2. LINKING THE INVOICE TYPE PAYMENT METHOD TO THE CHANNEL

After creating the Invoice type Payment Method, it will need to be linked to the appropriate Channels that it is going to be used on such as the POS Channel.

To link the Invoice type Payment Method to the Channel, complete the following:

- With the Invoice type Payment Method form open, select the small arrow next to the name of the Payment Method (Invoice) in the navigation bar.

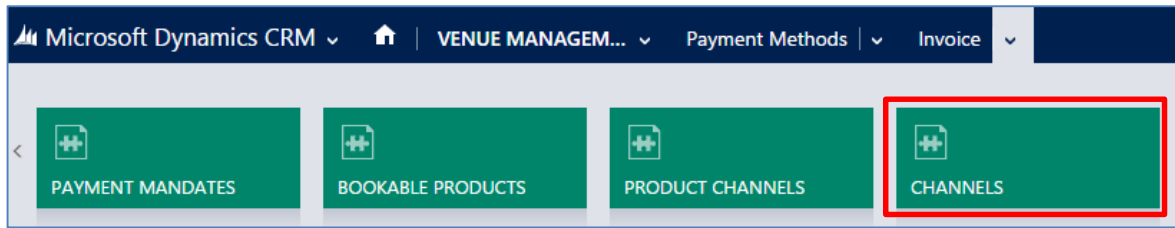
Microsoft Dynamics CRM | VENUE MANAGEM... | Payment Methods | Invoice

+ NEW DEACTIVATE DELETE EMAIL A LINK RUN WORKFLOW START DIALOG RUN REPORT

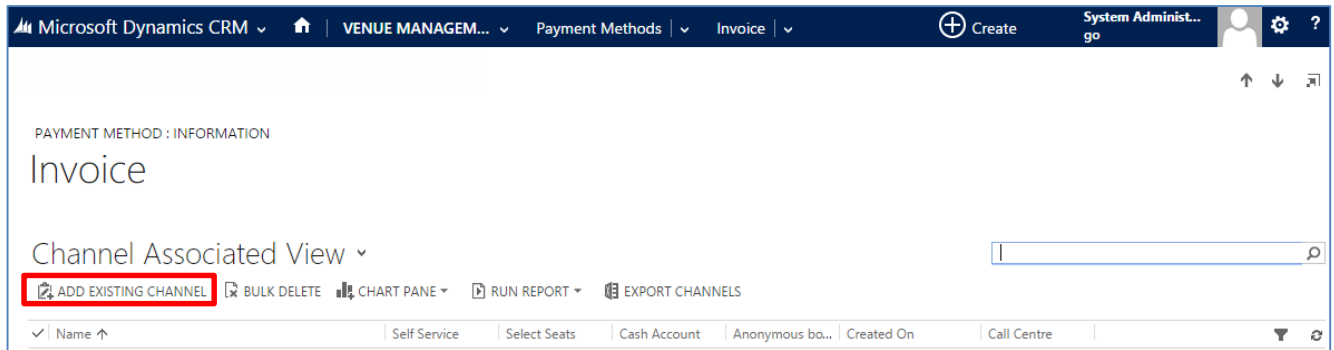
PAYMENT METHOD : INFORMATION

Invoice

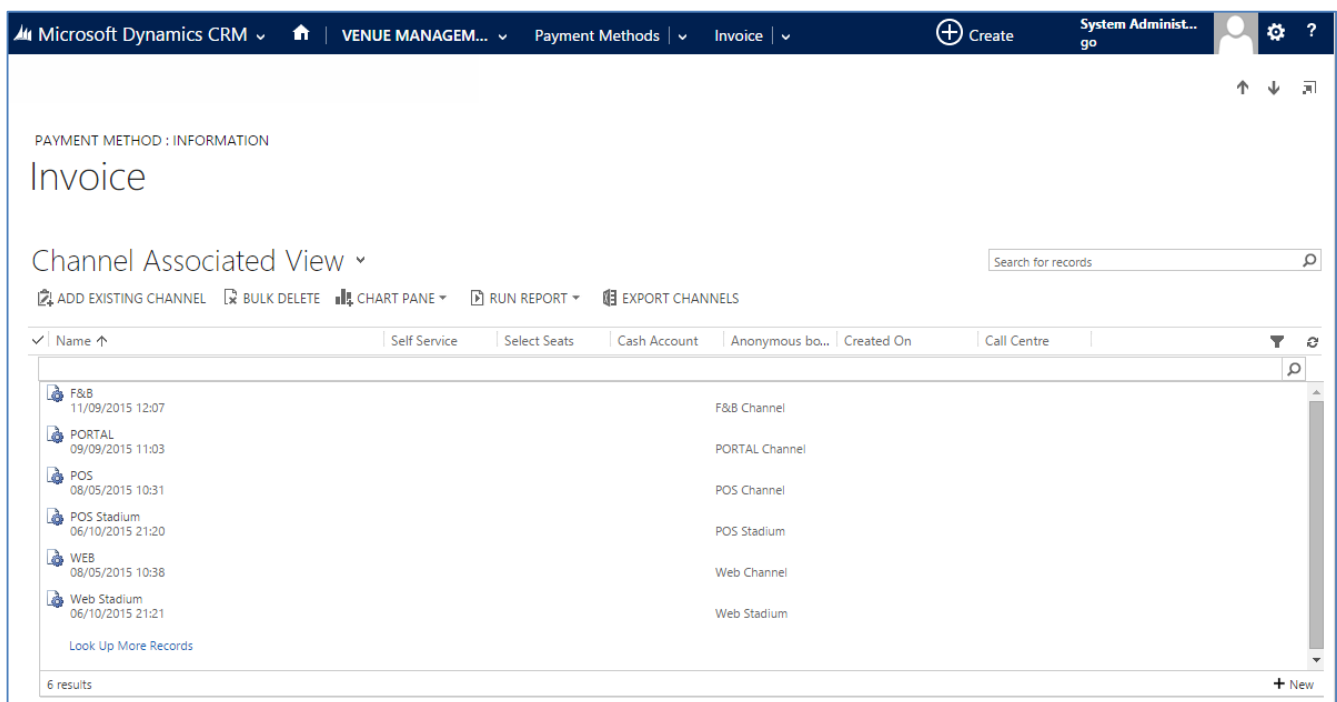
- From the drop down, scroll across and select **Channels**.



- c) The Channel Associated View will be displayed, select the **Add Existing Channel** on the ribbon.



- d) A search bar will drop down. Use the search bar to find the relevant Channel such as POS or alternatively select the magnifying glass icon to view a list of Channels with the option to Look Up more records.



- e) After finding the relevant Channel that the Payment Method will be used on, select it (e.g. the POS Channel). The Channel will then be added to the Payment Method Channel Associated View.

Microsoft Dynamics CRM | VENUE MANAGEM... | Payment Methods | Invoice | Create | System Administrat... go

PAYMENT METHOD : INFORMATION

Invoice

Channel Associated View ▾

ADD EXISTING CHANNEL | BULK DELETE | CHART PANE ▾ | RUN REPORT ▾ | EXPORT CHANNELS

Search for records

| ✓ Name ↑ | Self Service | Select Seats | Cash Account | Anonymous bo... | Created On | Call Centre |
|----------|--------------|--------------|--------------|------------------|------------|-------------|
| POS | No | Yes | Yes | 08/05/2015 10:31 | No | |

- f) When completed select the **Save** icon in the bottom right hand corner of the screen.

INVOICING ON THE POS

Upon creating the Invoice type Payment Method and associating it to the POS Channel, the Invoice Payment Method option will appear when making a payment on the POS.

To use the Invoice Payment Method complete the following:

- a) After adding a product to the shopping cart select the **Add Payment** button.

Customer
Joseph Walker (green4tom@gmail.com)
33 Hardwicke Road, Narborough, Leicester

Edit Details

Reference No.:

| Name | Unit | Qty | Line | | |
|---------------------------|--------|-----|--------|---|---------|
| Lift Pass - Daily (Adult) | £10.00 | 1 | £10.00 | X | Upgrade |

Discount And Promos

| | |
|--------------|--------|
| Total Price | £10.00 |
| Total to pay | £10.00 |

Add Comment

Close

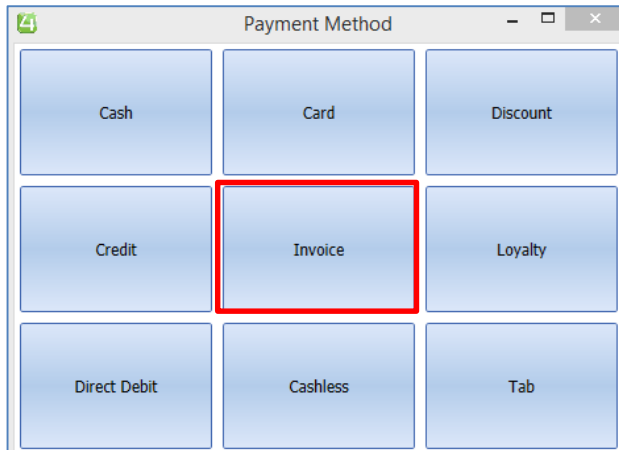
Print Wizard

Beneficiaries

Promotion

Add Payment

- b) The Payment Method window will open displaying all Payment Methods associated to the POS Channel. Select the **Invoice** option.



- c) The Invoice Payment Method window will open, within it an **Invoice Number** must be entered.

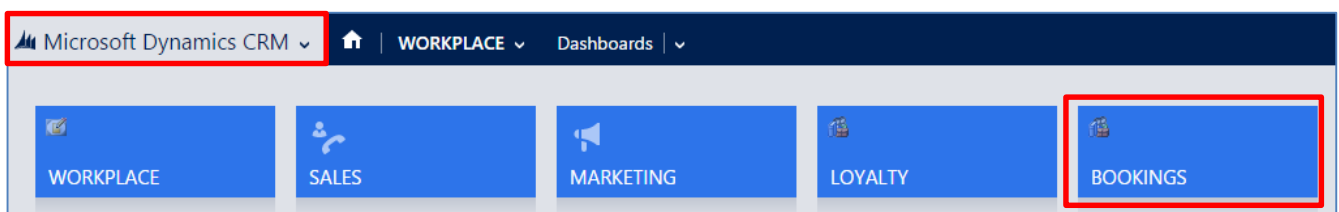
- d) Select the **Pay** button to complete the payment using the Invoice.

INVOICES AND BOOKING PAYMENTS WITHIN CRM

Each time a product is paid for using the Invoice type Payment Method, a Booking Payment is created within CRM. This will display the Invoice number that was entered in the POS and is linked to the Booking.

To view a Booking Payment, complete the following:

- a) Select the **Microsoft Dynamics CRM** tab in the navigation bar before choosing **Bookings** from the drop down.



- b) The Active Bookings view will be displayed, use the Search for records text box to find a Booking that has been paid for using the Invoice type Payment Method.

Microsoft Dynamics CRM | BOOKINGS | Bookings | Create | System Administ... go

+ NEW | DELETE | EMAIL A LINK | RUN REPORT | EXPORT TO EXCEL | IMPORT DATA | ADVANCED FIND

Active Bookings

Booking Referen... | Total Price | Booking Status | Parent Booking | Booking Referen... | Channel | Unrefunded Val... | Refund Value | Voucher Value | Discount Value | Paid

- c) Select and open the appropriate Booking in form view. With the Booking form open, select the small arrow in the navigation bar next to the name of the Booking. From the drop down choose **Booking Payments**.

Microsoft Dynamics CRM | BOOKINGS | Bookings | order 21/09/2015 1... |

PRINT JOBS | BOOKINGS | BOOKING CHARGES | BOOKING PAYMENTS

- d) The Booking Payment Associated View will open displaying all Booking Payments associated to the Booking. Select and open a Booking Payment.

Microsoft Dynamics CRM | BOOKINGS | Bookings | order 21/09/2015 1... | Create | System Administ... go

BOOKING : INFORMATION

order 21/09/2015 12:40:06

Booking Payment Associated View

ADD NEW BOOKING PAY... | ADD EXISTING BOOKING ... | BULK DELETE | CHART PANE | RUN REPORT

| Name | Payment Metho... | Payment Amou... | Booking Operat... | Payment Status | Card Authorisati... | Terminal | Card Number | Discount Code | Voucher No. | Payment Dat... |
|-----------------|------------------|-----------------|-------------------|----------------|---------------------|----------|--------------------|---------------|-------------|-----------------|
| Invoice Paym... | Invoice | \$10.00 | Green 4 | Approved | | | Ticket Office Till | | | 21/09/2015 1... |

- e) The Booking Payment form will display the Payment Method that was used to complete the Booking such as an Invoice, as well as the Payment Amount and Date. Additionally the **Invoice Number** that was entered into the POS will be stored here.

Microsoft Dynamics CRM | BOOKINGS | Bookings | Invoice Payment

+ NEW | DEACTIVATE | DELETE | EMAIL A LINK | RUN WORKFLOW | START DIALOG | RUN REPORT

BOOKING PAYMENT : INFORMATION

Invoice Payment

General

| | | | |
|--------------------|----------------------------------|-------------------------|---------------------------|
| Payment Method | <u>Invoice</u> | Payment Amount | \$10.00 |
| Booking | <u>order 21/09/2015 12:40:06</u> | Payment Date | 21/09/2015 12:53 |
| Name * | Invoice Payment | Payment Status | Approved |
| Booking Operator | <u>Green 4</u> | Terminal | <u>Ticket Office Till</u> |
| Loyalty Redemption | -- | Charge Amount (Base) | -- |
| Provider Reference | -- | | |
| Card Type | -- | Card Authorisation Code | -- |
| Card Number | -- | Card Start | -- |
| Card Holder Name | -- | Card Expiry | -- |
| | | Card Issue No. | -- |
| Payment Service | -- | Service Reference | -- |
| Payment Reference | -- | | |

Other

| | | | |
|-----------------|-------------|-------------|----|
| Discount Code | -- | | |
| Discount Reason | -- | | |
| Invoice Number | 2468 | Voucher No. | -- |

End of Document