



# Office - 2.18.19 Release

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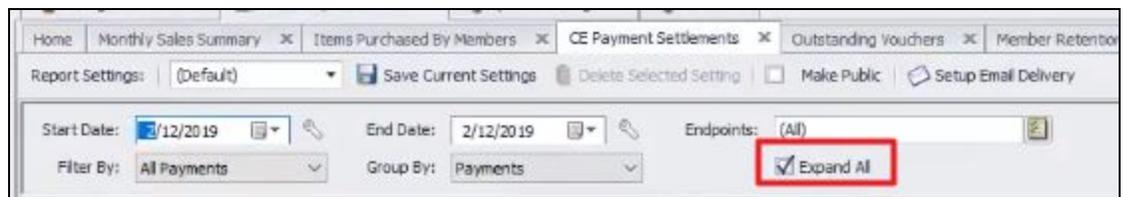
# Enhancements

## Interactive Reporting

### CE Payment Settlements Report

- Added an “Expand All” option to the CE Payments Settlements report.

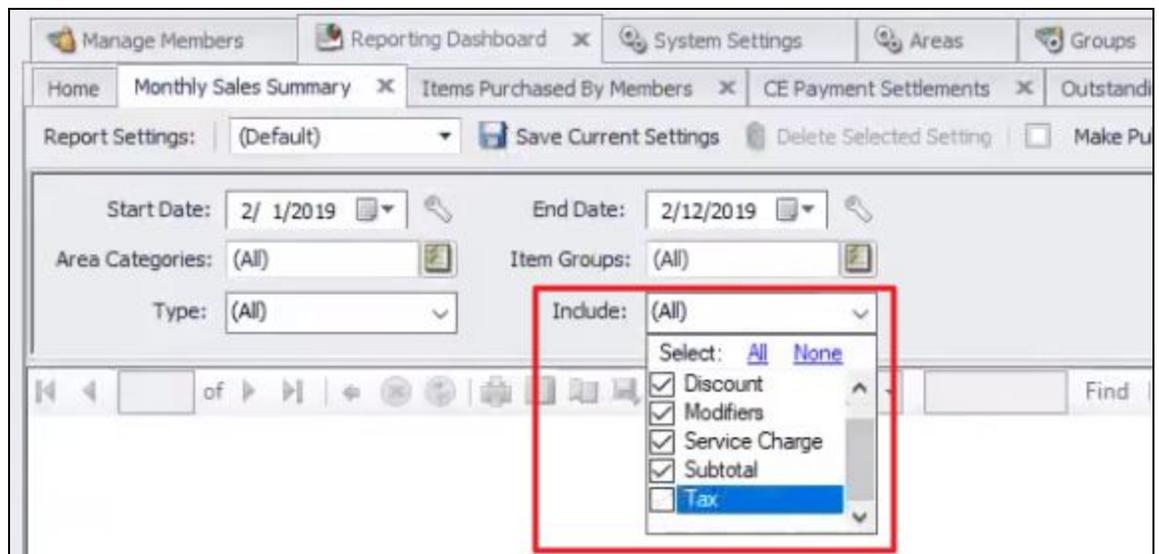
Use Case: Previously, users had to expand batches one at a time on the report to view all details within the report. Now, users can easily select Expand All to see all details upon initial view.



### Monthly Sales Summary Report

- Updated the Monthly Sales Summary report to make the Grand Total include/exclude taxes.

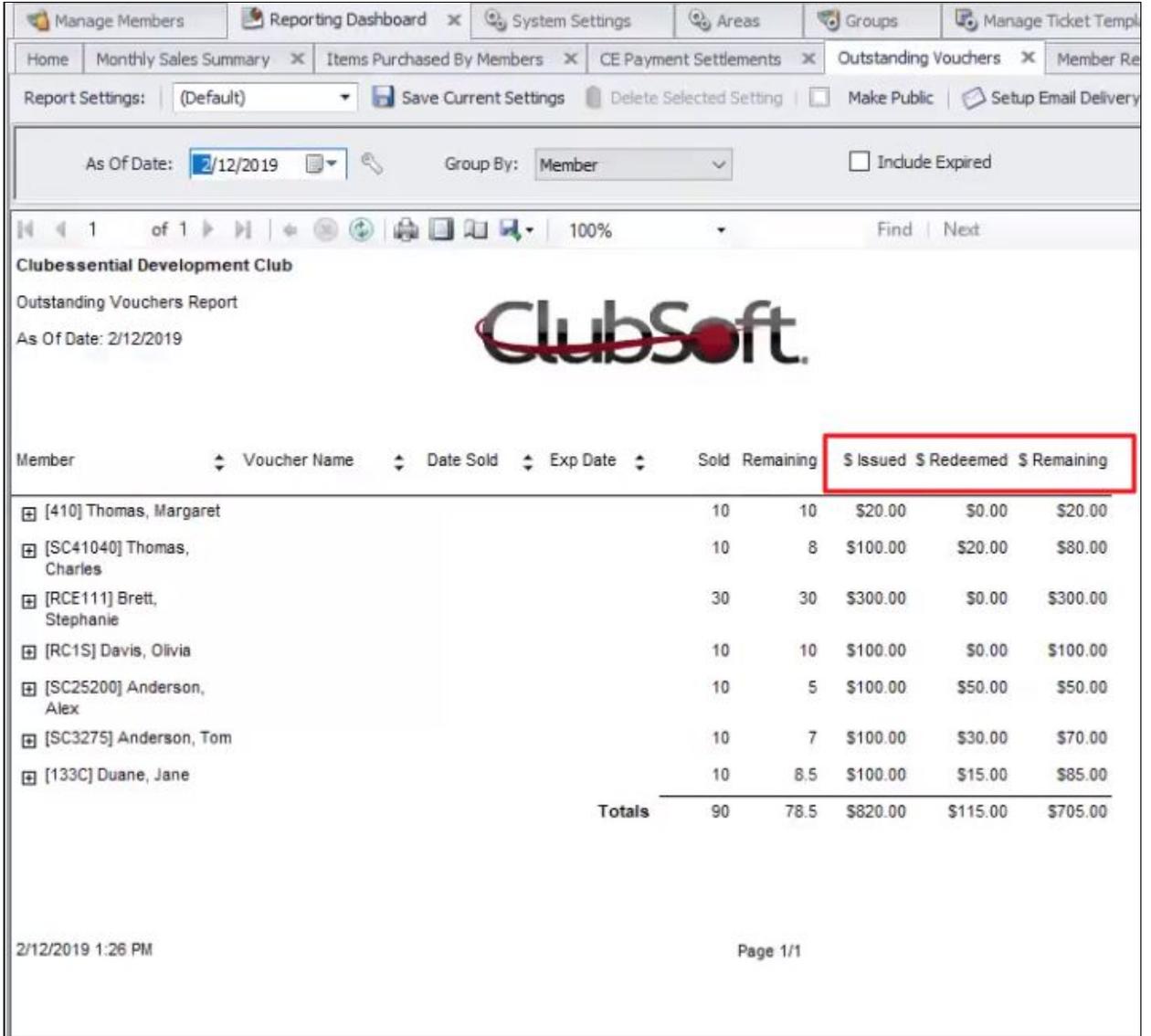
Use Case: Users can now run a Monthly Sales Summary Report and choose to include or exclude Taxes, Service Charges, and other fees or modifiers.



## Outstanding Vouchers Report

- **Added dollars Issued, dollars Redeemed, and dollars Remaining fields to the Outstanding Vouchers Report.**

Use Case: Previously, the Outstanding Vouchers Report only showed Sold and Remaining columns. Now, this report includes dollar amount issued, redeemed, and remaining to facilitate g/l reconciliation.



Clubessential Development Club  
Outstanding Vouchers Report  
As Of Date: 2/12/2019

| Member                    | Voucher Name | Date Sold | Exp Date | Sold | Remaining | \$ Issued | \$ Redeemed | \$ Remaining |
|---------------------------|--------------|-----------|----------|------|-----------|-----------|-------------|--------------|
| [410] Thomas, Margaret    |              |           |          | 10   | 10        | \$20.00   | \$0.00      | \$20.00      |
| [SC41040] Thomas, Charles |              |           |          | 10   | 8         | \$100.00  | \$20.00     | \$80.00      |
| [RCE111] Brett, Stephanie |              |           |          | 30   | 30        | \$300.00  | \$0.00      | \$300.00     |
| [RC1S] Davis, Olivia      |              |           |          | 10   | 10        | \$100.00  | \$0.00      | \$100.00     |
| [SC25200] Anderson, Alex  |              |           |          | 10   | 5         | \$100.00  | \$50.00     | \$50.00      |
| [SC3275] Anderson, Tom    |              |           |          | 10   | 7         | \$100.00  | \$30.00     | \$70.00      |
| [133C] Duane, Jane        |              |           |          | 10   | 8.5       | \$100.00  | \$15.00     | \$85.00      |
| <b>Totals</b>             |              |           |          | 90   | 78.5      | \$820.00  | \$115.00    | \$705.00     |

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## Membership

### Member Payment Wizard

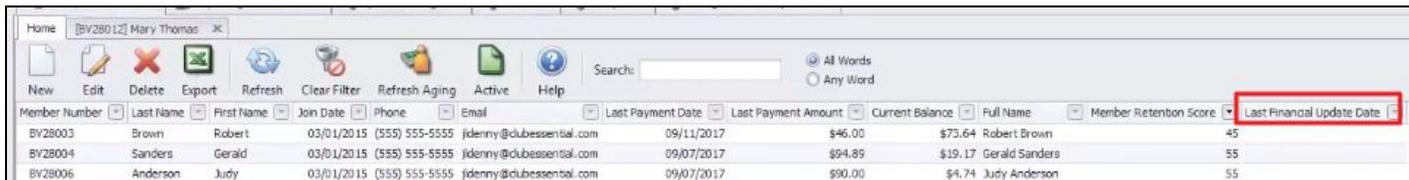
- Updated the logic system uses when automatically creating cash receipts in the Member Payments Wizard.

Use Case: Previously, Clubs that are Multi AR companies, would post a batch and the system would error, saying that it could not post this batch because there is an account tied to a department that isn't linked. Now, when cash receipts are created, the system will acknowledge that the cash receipts created should only tie to linked accounts/departments.

### Manage Members

- Added a "Last Financial Update Date" column to the Manage Members grid.

Use Case: The new Last financial Update Date column in the Manage Members grid shows the last time a Member's financial/aging information was updated to ensure users understand the date the financial data/dates showing on the grid is reflecting. To add this column, right click, select customize columns, and choose to display this field.

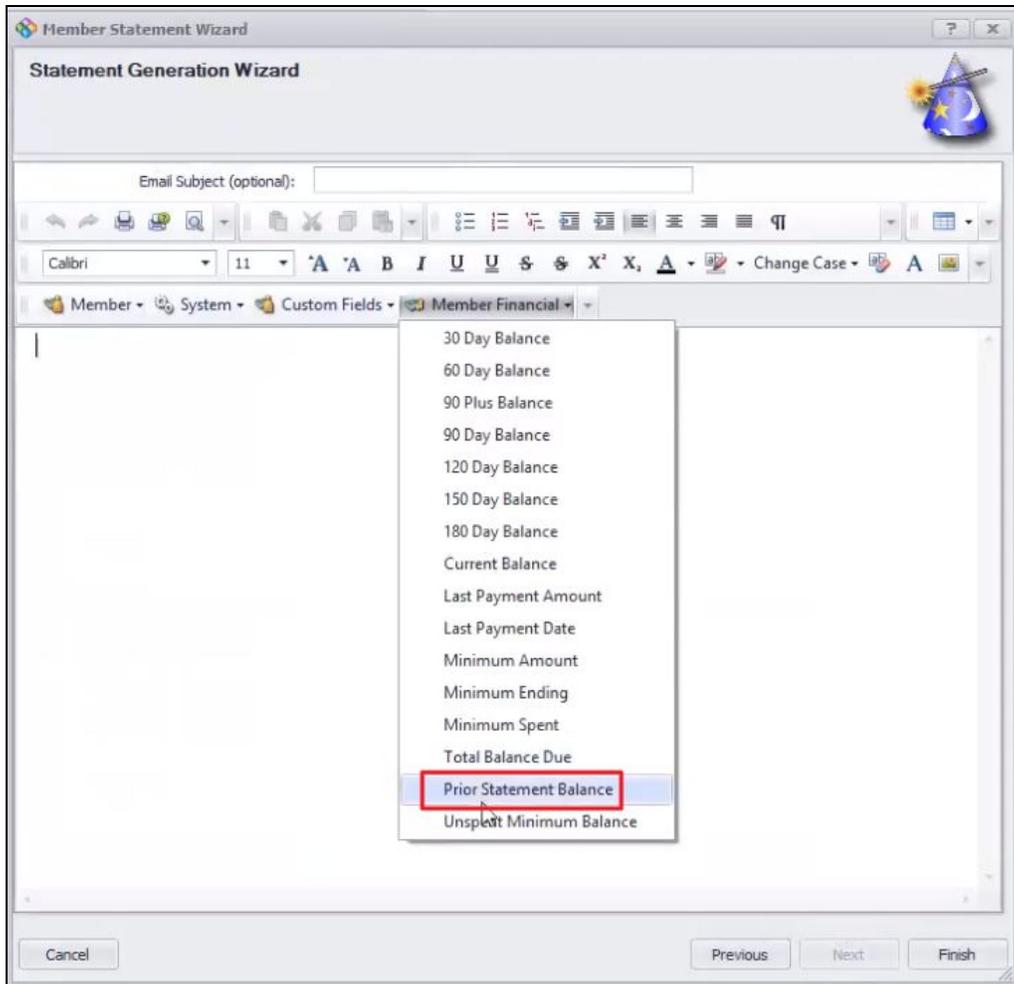


| Member Number | Last Name | First Name | Join Date  | Phone          | Email                    | Last Payment Date | Last Payment Amount | Current Balance | Full Name      | Member Retention Score | Last Financial Update Date |
|---------------|-----------|------------|------------|----------------|--------------------------|-------------------|---------------------|-----------------|----------------|------------------------|----------------------------|
| BV28003       | Brown     | Robert     | 03/01/2015 | (555) 555-5555 | jdenny@clubessential.com | 09/11/2017        | \$46.00             | \$73.64         | Robert Brown   | 45                     |                            |
| BV28004       | Sanders   | Gerald     | 03/01/2015 | (555) 555-5555 | jdenny@clubessential.com | 09/07/2017        | \$94.89             | \$19.17         | Gerald Sanders | 55                     |                            |
| BV28006       | Anderson  | Judy       | 03/01/2015 | (555) 555-5555 | jdenny@clubessential.com | 09/07/2017        | \$90.00             | \$4.74          | Judy Anderson  | 55                     |                            |

### Member Statement Wizard

- Updated name, and changed how the Prior Statement Balance snippet is calculated.

Use Case: Previously, this snippet was called Total Statement Balance, from the Statement Generation Wizard. Now, renamed Prior Statement Balance, it calculates the Member's balance as it was for the previous month.



## Mobile POS (Pilot Clubs Only)

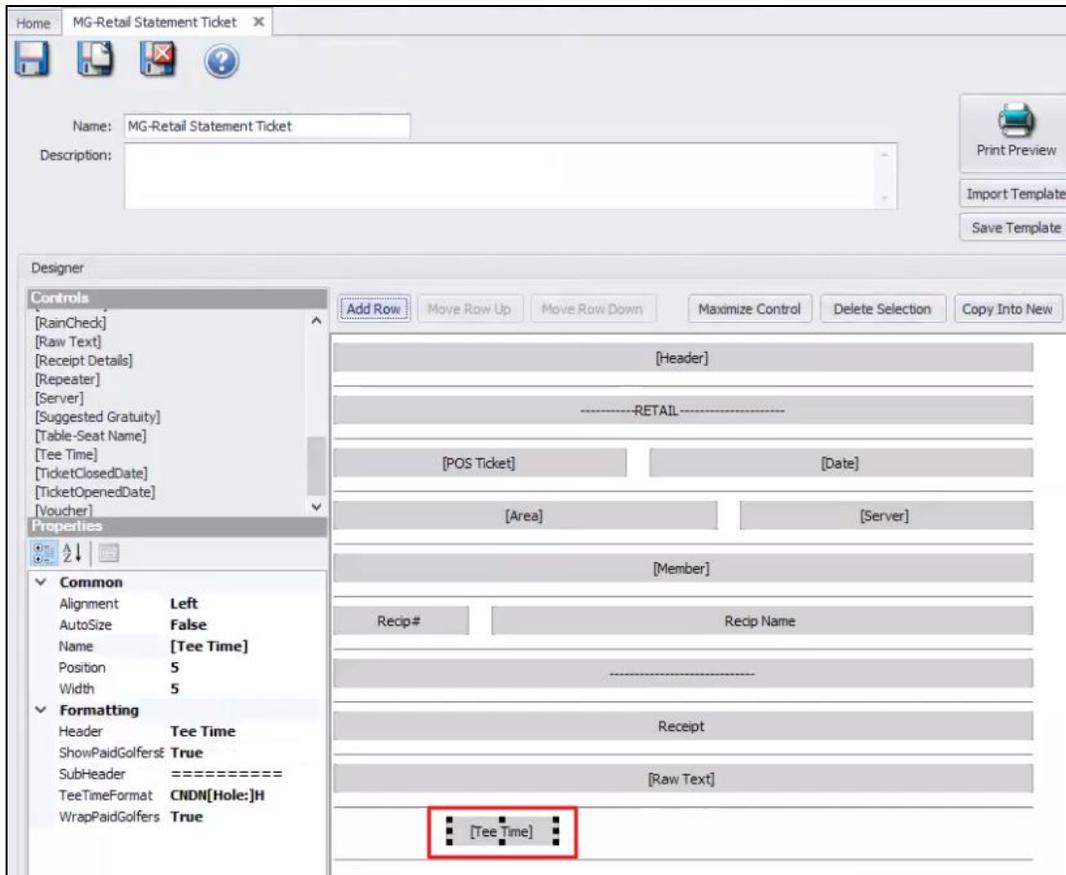
**Please Note:** These changes only affect Clients **piloting the Mobile POS program.**

- **A full redesign of Mobile POS has been completed.**

Use Case: Mobile POS Users will notice a distinct difference in the look and feel of Mobile POS. The User Design has been upgraded to be more visually pleasing and User friendly. Please refer to [this guide](#) for a more detailed look at specific changes.

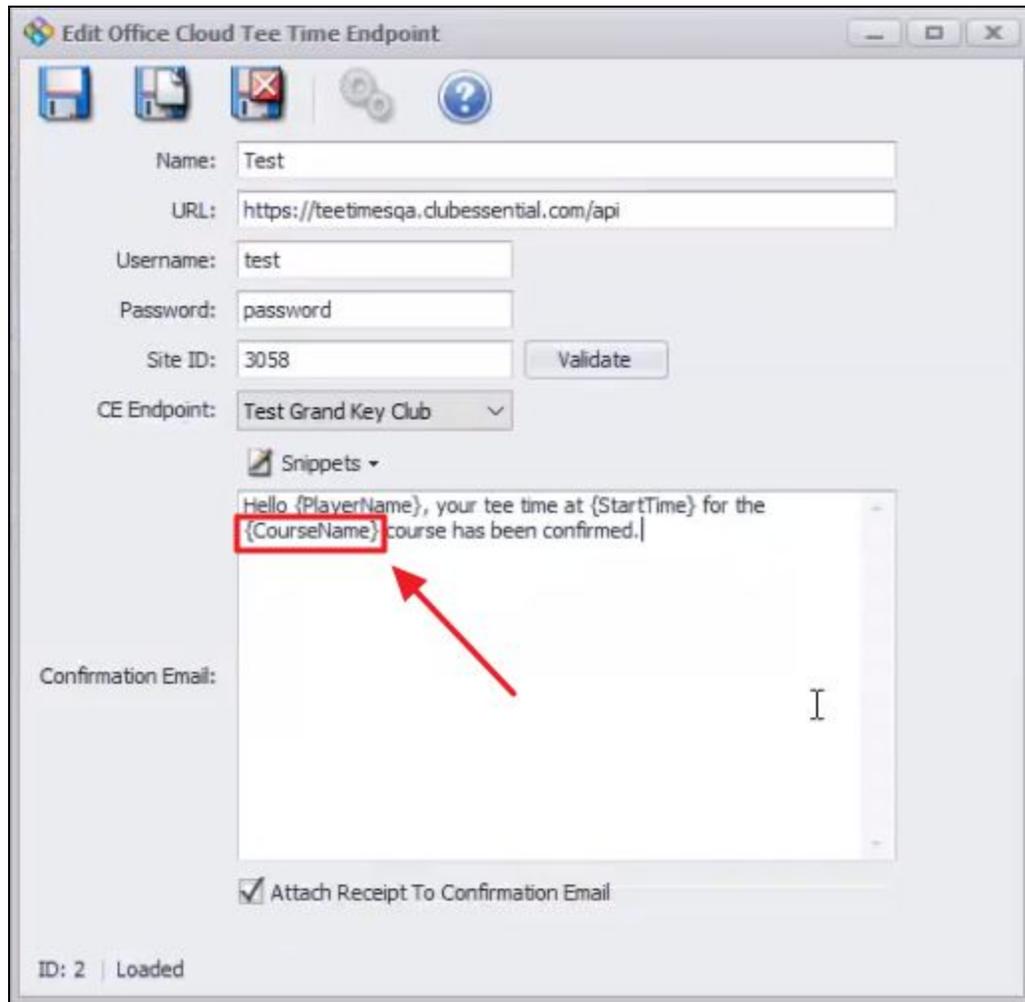
- **Added support for Tee Times ticket template element.**

Use Case: Previously, the Tee Times Ticket Template element was only available in Classic POS. Now, a Tee Times ticket template element can be added and will show on Mobile POS tickets as well. Editing template settings remains the same, from Manage Ticket Templates in Office under POS, as seen below.



- **Added a Snippet for Course Name to the Tee Time Confirmation email template for Mobile POS.**

Use Case: Previously, Users were only able to include snippets for Player Name and Start Time in confirmation emails. Now, when a User is checked in for a Tee Time through Mobile POS Users can set an email confirmation to go to the Member, including the Course name as well as Player Name and Start Time.



- **Added an area-level setting to include the use of Seating, called “Use Seating in Mobile POS”.**

Use Case: Previously, there was no setting available to toggle between being able to use Seating in Mobile POS and not. Now, Users can uncheck Use Seating in Mobile POS and will then **not** be prompted to select a seat for each item entered. Unchecking this setting would be ideal for a beverage cart or something similar where there are no ‘seats’. See setting location and Mobile POS popup menu below.

**Area Information**

Name:  POS Type:  FnB  Retail

Description:  Department:

Screen Group:  Area Category:

Active Layout:  Manager:

Tab Payment:  Display Order:  [Schedule Overrides \(0\)](#)

Cloud SG:  Cloud Quick CC:

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Allow Clock In/Out  Require Comp/Discount Selection  Use Seat Type

Allow Clock Out with Open Tickets  Require PIN and Swipe Card for Login  Use Seating in Mobile POS

Allow Employees To Change Display Order in POS  Require Ticket Cover Count  Prompt for Cover Before Send

Default POS to Guest Member  Prompt for Cover Before Table Select

Disable Gratuity Button on Settlement  Require Void Selection  Send with Quick Settlement

Disable Gratuity Prompt with Credit Card  Show all Open Tickets in POS

Do Not Require Send Before Exit  Show Company Toggle on Member Lookup in POS

Draw Member Favorites Button  Show Meal Period Name on Statement

Enable Mobile Ordering  Show Member Preferences

Gratuity Override:   Show POS Check-In

Group Like Items in POS  Member Check-In Item:

Hide Dependents in POS  Guest Check-In Item:

Hide Quick Cash  Allow Family Check-In

Hide Quick Member Charge  Show Print Preview on Pay/Settle in POS

Hide the Gift Card Balance Button in POS  Show Print Preview on Send in POS

Hide the 'Labor' Tab in POS  Show Tee Time as Read-Only in POS

Prompt for Member on Seat in POS  Show Summary Breakout on Statement

Prompt for Send on Re-Order  Item Group  Item Category

Request Member Email on POS Ticket  Use Coursing

Print Email on Same Receipt  Use Firing

Require a Send Before Printing Receipt



## Member Relationship Management Module (Beta Release)

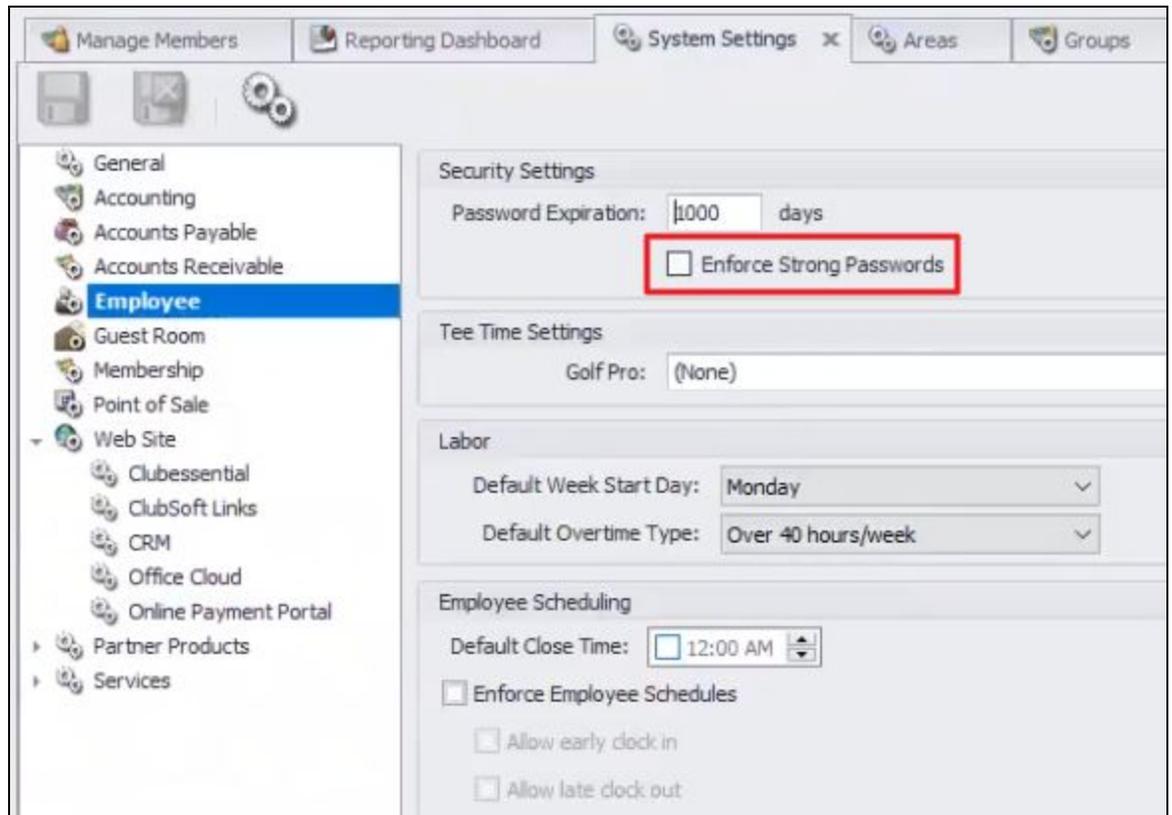
- Enhanced reporting, graphical score display for Members and dynamic group creation.
- For more information on this program, please contact [education@clubessential.com](mailto:education@clubessential.com).

## System Settings

### Employee

- **Added additional security for clubs using the “Enforce Strong Passwords” option.**

Use Case: Passwords must be at least 7 characters long, passwords must contain one numeric and one alphabetic character, Employees cannot re-use one of their last four passwords. Also, if an Employee enters the wrong password five times within two minutes, they are locked out of the system for thirty minutes.



## PayCloud

- Updated the logic for handling how Office pushes AR statement breakout data to PayCloud.

*Use Case:* Previously, the system would error when certain statement breakout data was pushed to PayCloud because it was not labeled as an AR account and the push would not succeed. Now, updates to the logic for this process remove repeated system errors and succeed in pushing the statement data.

## Bug Fixes

- Updated the Items Purchased by Members Report so that Hide Zero Balance Purchases setting applies more consistently.
- Fixed an issue with Mobile Ordering ticket batching occurring on date order was initiated (which was sometimes days or weeks prior to actual order occurring) rather than when order was actually placed.

- Fixed an issue with the End of Shift report in Mobile POS including not-yet-placed mobile orders.
- Fixed an issue with the employee lookup in Mobile POS being case-sensitive.
- Fixed an issue when adding a note to a batch and then immediately trying to post it.
- Fixed an issue where POS tickets closed with credit card using ETS stayed in a PreApproved state when the area was set to just capture credit cards.
- Fixed an issue when closing multiple Mobile POS tickets at once and some invoices not getting created correctly in CMA.
- Fixed an issue when trying to do a Create Ticket in Mobile POS for a tee time reservation when there was no member on the tee time.
- Added a file name extension to the attachment for Tee Time confirmation emails in Mobile POS to ensure ease of opening on the Member end.
- Fixed an issue when doing a return for a tax inclusive item with a price schedule discount.
- Fixed an issue in Classic POS when re-ordering an Ask for Quantity item with a quantity greater than one that has a price schedule discount.
- Fixed an issue where users could not void a check if it contained a comment line item.
- Fixed an issue when multiple areas are configured for Mobile Ordering and use the same terminal device and that device appears multiple times on the Mobile POS device selection page.
- Fixed an issue where vouchers that had never been redeemed but were adjusted did not show up in the Member Voucher Transactions report.
- Fixed an issue when expanding a Mobile POS charge batch's details and only seeing settlement information for one ticket.
- Fixed an issue where a vendor's balance due did not match the aging balance when there was a charge exactly 30, 60, or 90 days previous.
- Fixed an issue where Guest Room Confirmation Emails were getting sent to the wrong employee.

- Fixed an issue when attempting to save an existing scheduled task.