

# Office (9.24.18) Release

Office - Release Notes

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## Enhancements

### Credit Book - Expiration Wizard

- **Enhanced Credit Book Expiration process by giving Users the ability to Expire Negative Credit Books.**

*Use Case:* Approximately a year ago, the Credit Book Expiration Wizard was introduced, eliminating the ability to issue negative credit book (which was sometimes using to offset positive credit book balances). Since then, however, eliminating aged negative credit book balances has been a challenge. With this enhancement, Clubs looking to reconcile and clean up their offsetting Credit Book balances in Office have the ability to expire negative credit book (as well as positive credit book). Once expired, Credit Books will no longer populate in the Credit Book Expiration Wizard as active.

**Please Note:** Best Practice is to adjust the expiration date, and expire both the positive and negative offsetting credit book balances at the same time.

**Credit Book Expiration Wizard**  
Enter a date in the 'Expire Date' column to change the expiration date

Issued To	Description	Amount	Remaining	Expire Date	New Expire Date
Members, Michael [2/18/18]	Golf Credit Book	\$60.00	\$45.53	2/8/2018	2/8/2018
Members, Michael [2/18/18]	Extension	\$256.24	\$211.20	2/28/2018	2/28/2018
Members, Mike [2/18/18]	Golf Credit Book	\$3,260.00	\$620.72	3/21/2018	3/21/2018
Members, Mike [2/18/18]	Season Opening Event	\$80.00	\$80.00	3/25/2018	3/25/2018
Members, Mike [2/18/18]	Season Opening Event	\$80.00	\$80.00	3/25/2018	3/25/2018
Members, Joe [2/18/18]	Season Opening Event	\$50.00	\$43.33	3/25/2018	3/25/2018
Members, Bob [2/18/18]	Season Opening Event	\$50.00	\$31.84	3/25/2018	3/25/2018
Members, Fran [2/18/18]	Golf Credit Book	\$15.00	\$13.04	4/9/2018	4/9/2018
Members, Martha, J. [2/18/18]	Golf Credit Book	\$125.00	\$25.00	4/11/2018	4/11/2018
Members, Ray [2/18/18]	Golf Credit Book	\$25.00	\$25.00	4/11/2018	4/11/2018
Members, Martha, J. [2/18/18]	Golf Credit Book	(\$25.00)	(\$25.00)	4/11/2018	4/11/2018
Members, Mike [2/18/18]	Member/Member/Mem...	\$200.00	\$161.76	4/22/2018	4/22/2018
Members, J. [2/18/18]	Member/Member/Mem...	\$30.00	\$26.31	4/22/2018	4/22/2018
Members, John [2/18/18]	Member/Member/Mem...	\$200.00	\$2.42	4/22/2018	4/22/2018
Members, Mike [2/18/18]	Member/Member/Mem...	\$270.00	\$97.26	4/22/2018	4/22/2018
Members, Michael [2/18/18]	Member/Member/Mem...	\$120.00	\$120.00	4/22/2018	4/22/2018
Members, Joe [2/18/18]	Member/Member/Mem...	\$120.00	\$120.00	4/22/2018	4/22/2018
Members, Mike [2/18/18]	Member/Member/Mem...	\$200.00	\$200.00	4/22/2018	4/22/2018
Members, Mike [2/18/18]	Member/Member/Mem...	\$200.00	\$57.30	4/22/2018	4/22/2018
Members, John [2/18/18]	Member/Member/Mem...	\$270.00	\$177.24	4/22/2018	4/22/2018
Members, Michael [2/18/18]	Member/Member/Mem...	\$270.00	\$21.88	4/22/2018	4/22/2018
Members, David [2/18/18]	Icebreaker	\$83.33	\$57.21	4/29/2018	4/29/2018
Members, Michael [2/18/18]	Icebreaker	\$83.33	\$38.80	4/29/2018	4/29/2018
Members, Fran [2/18/18]	Icebreaker	\$170.00	\$141.23	4/29/2018	4/29/2018

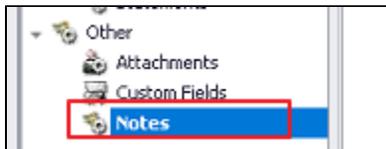
Buttons: Cancel, Previous, Next, Finish

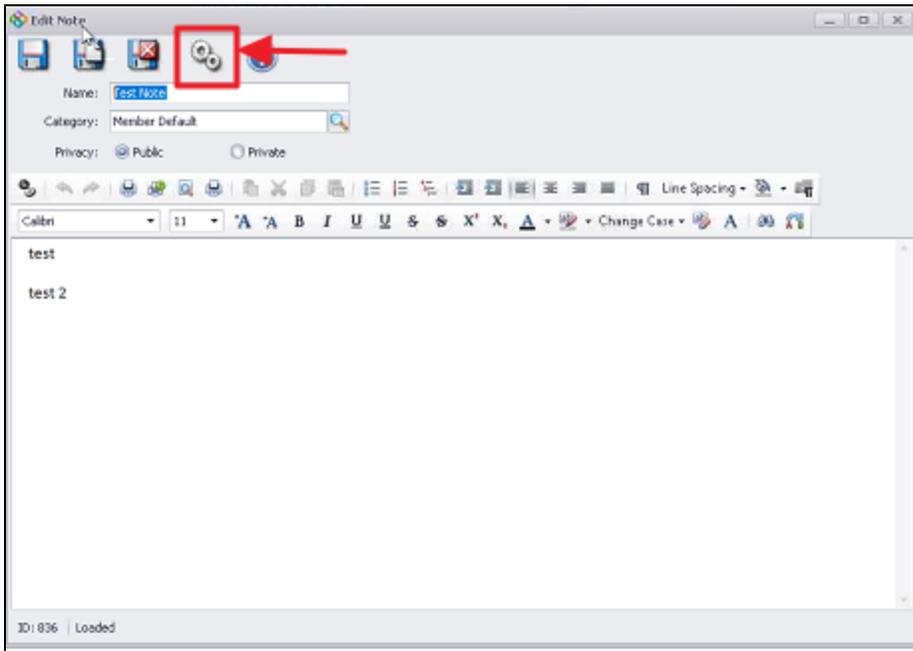
## Notes - Change Log

Enhanced User experience by adding a Change Log for any area that allows Notes.

Use Case: Previously, when any Notes section (available in Members, Vendors, Guests, etc.) was edited (including

making a note Public or Private), no log of changes was available. Now, Users can view who changed the note and when they did so, in the newly added Change Log.





Date	Module	Type	Relationship	Field	Old Value	New Value	Changed By
9/18/2018 2:13 PM	Notes	Added	Test Note			Test Note	User, Administrative
9/18/2018 2:13 PM	Notes	Changed	[561] Davis, Jeffrey ...	Note	Changed	Changed	User, Administrative

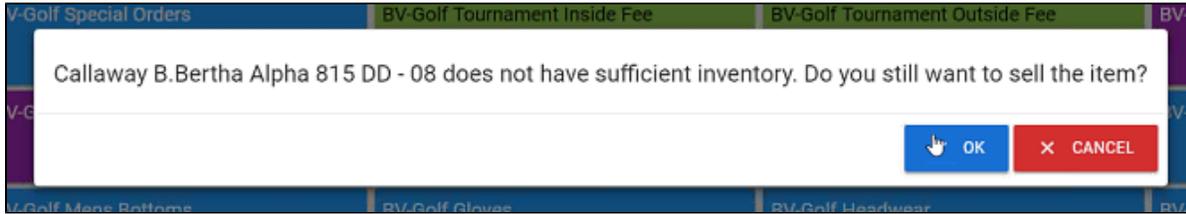
## Mobile POS (Pilot Clubs Only)

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

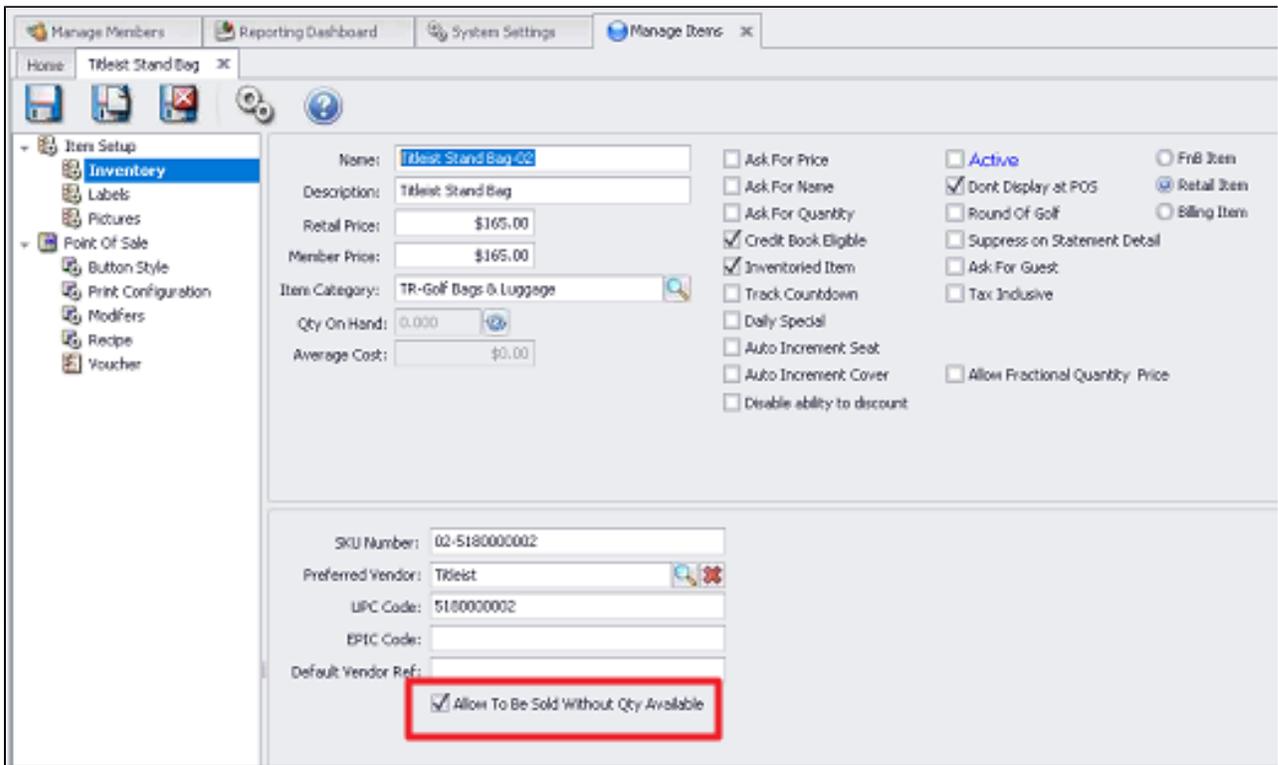
## Inventory Support

- For Inventoried Items, enhanced User experience by showing a warning when attempting to sell an Item with zero quantity in inventory, and preventing sale of item where permissions are not sufficient.

Use Case: In Mobile POS, a User is processing a sale of a new golf club, with an inventory of zero. Within the transaction, User will receive a warning message “[Item] does not have sufficient inventory. Do you still want to sell the item?”. Now, within Mobile POS the User with the correct security level can select OK, enter their credentials, and the sale can be processed.



**Please Note:** The warning message will only populate when “Allow Item to be Sold without Quantity Available” is NOT checked in CMA.



- Inventoried items sold from Mobile POS now update CMA to properly reflect reduction in Inventory Quantities.

## Gift Card Support

- Enhanced User experience by allowing the use, sale, and balance checks/details of Gift Cards.

Use Case: Previously, Mobile POS did not support gift card usage. Users can now sell Gift Cards to Members and Guests, allow for automatic numbering of Gift Cards (which syncs with CMA/Classic POS), complete a sale with Gift Card as payment, and check the remaining balance or issuance details of a Gift Card on Mobile POS, as seen below.

Sales of gift cards can be issued to Guests or Members. Once gift card item has been chosen, and issuance amount has been entered, gift card specifics may be populated. If auto increment has been turned on in Classic, gift card number (113 below) will auto-populate.



**Select a Gift Card**

TRACK  ✕  Show Invalid  Show Expired

**Details**

Assigned To	Number	Issued	Balance
<input type="checkbox"/> Davis Fisher	G6113	\$50.00	\$19.67
<input checked="" type="checkbox"/> John Anderson	113	\$50.00	\$50.00

```

Total:                $31.03
Gift Certificate:     -$31.03
-----
Due:                  $0.00
  
```

Users can check the balance and details of a Gift Card from the main menu by selecting Gift Card Balance and then entering the Gift Card Number, as shown below.

**Open Tickets**

OPEN TICKETS

Member No.	Member Name	Area	Table
...	...	...	...

- Member Lookup
- + New Ticket
- End Of Shift Report
- End Of Shift Report - All
- Gift Card Balance**

**Gift Card Balances**

TRACK  ✕  Show Invalid  Show Expired

Assigned To	Number	Issued	Balance
<input type="checkbox"/> Davis Fisher	G6113	\$50.00	\$19.67
<input type="checkbox"/> John Anderson	113	\$50.00	\$50.00

### Gift Card Details

Purchased By: Alex Anderson

Issued Amount: \$50.00

Balance: \$50.00

Expiration Date: Monday, September 18, 2021

Date Issued: Tuesday, September 18, 2021

Card Number: 113

Track: 113

Assigned To: John Anderson

Description: New gift card

## Security

- Added employee security role support for Tax Exempt/Service Charge Exempt in Mobile POS.

*Use Case:* To make a POS ticket Tax or Service charge exempt, the Employee security in the POS Terminal Category must be checked for Service Charge Exempt and Tax Exempt. Now Mobile POS respects this rule set from CMA to either allow or disallow employee from making ticket tax or service charge exempt.

Employee Information

First:  Middle:  Last:

Email:  Phone:   Salaried Employee

Inherited from group  Insufficient permission

Category:

Name	Category	View	Edit	Create	Delete
Allow Login Override	POS Terminal	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Allow Negative Quantity and Returns	POS Terminal	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Allow Negative When Asking For Price	POS Terminal	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Allow Schedule Override	POS Terminal	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Allow System Tools	POS Terminal	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Change Other Servers Tickets	POS Terminal	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Comp Ticket	POS Terminal	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Create Ticket	POS Terminal	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Delete Closed Ticket	POS Terminal	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Discount Ticket	POS Terminal	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Manage Events POS	POS Terminal	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Manage Timekeeping	POS Terminal	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Override Sell Below Zero Inventory	POS Terminal	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Reopen Tickets	POS Terminal	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Service Charge Exempt	POS Terminal	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Skip credit card processing in POS	POS Terminal	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Tax Exempt	POS Terminal	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Transfer Ticket	POS Terminal	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

## Bug Fixes

- Fixed an issue with the CE Payments Settlements report including settlements that occurred outside of the Start/End Date of the report.
- Fixed an issue when viewing the Settle Chit for a Mobile POS ticket in CMA and the chit did not display properly.

- Fixed an issue when using Deferred billing schedules with combo billing and the journal batch not breaking out the settlement amounts by the billing frequency.
- Fixed an issue with the General Ledger Dashboard's Consolidated Rolling Net Profit/Loss displaying incorrectly.
- Fixed an issue with the Hour of Day field in the Golf Play view of the Data Genie not displaying properly/always displaying a 0.
- Fixed an issue when setting up a club for Mobile POS and Mobile Ordering and Area data not syncing properly.

## **Downloadable Guide**