

# Office - Modules and Topics

[Office Help Home](#)

Explore the various Office Modules and Topics. Find How-To's, Best Practices, and Downloadable Guides to assist you with mastering these tools.

## Office - CMA (Clubessential Management Application)

- Office - General
  - Office - Navigating CMA
  - Office - Grids
  - Office - Area Groups
  - Office - Area Categories
  - Office - Website Sync Guide (Admin Use Only)
  - Office - System Videos
- Office - Accounts Payable
  - Office - Managing and Entering Vendor Invoices
  - Office - Manage Vendors
  - Office - Vendor Categories
  - Office - Vendor Payment Terms
  - Office - Manage Item Receipts
  - Office - Manage Credit Memos
  - Office - Approved Vendor Invoice and Payment Batches
  - Office - Pay Bills and Print Checks
  - Office - CSI Global VCard User Guide
  - Office - Void Checks
  - Office - Billing Reciprocal Charges to Members
  - Office - Refund Check to Member
  - Office - 1099 Wizard
  - Office - Creating Vendor Labels
  - Office - Accounts Payable Videos
- Office - Club Intelligence
  - Office - Club Intelligence - Manage Dashboard Layouts - Custom Dashboards
- Office - Employees
  - Office - Manage Employees - Employee Management
  - Office - Employees - Groups
  - Office - Employees - Job Codes
  - Office - Employees - Troubleshooting Area and Departmental Rights
  - Office - Employees - Timekeeping
  - Office - Employee Videos
- Office - Events
  - Office - Event Calendar Videos
- Office - General Ledger
  - Office - General Ledger Overview
  - Office - General Ledger - Creating / Opening General Ledger Periods
  - Office - General Ledger - Budgets - Budget Management
  - Office - General Ledger - Bank Reconciliation Wizard
  - Office - End of Year Instructions - Year End Wizard
  - Office - General Ledger Videos
- Office - Guest Rooms
  - Office - Guest Rooms Module Version 5.5
  - Guest Rooms - Confirmation Email - Images
  - Guest Rooms - Settling Folio Card/Reciprocal Account
- Office - Interactive Reports
  - Office - Financial Report Writer
  - Office - Data Genie
  - Office - Dashboard & Interactive Reports
  - Office - Accounts Payable-Vendor Reports
  - Office - Exporting Addresses to Excel: Mail Merge
- Office - Items
  - Office - Manage Items - Create an Item
  - Office - Manage Item Modifiers - Item Modifier Controls
  - Office - Manage Item Categories - Create an Item Category
  - Office - Vouchers
  - Office - Items Manual
  - Office - Tax and Service Charge Guide
  - Office - Inventory Adjustment Wizard
  - Office - Inventory Physical Count Wizard
  - Office - Items Videos

- Office - Marketing
  - Office - Marketing Module
  - Office - Web(Links) - Videos
  - Office - Classic Editor
  - Office - Hosted Editor
- Office - Membership
  - Office - Manage Members - Membership Management
  - Office - Member Types
  - Office - Member Groups
  - Office - Membership - End of Month - Month End Wizard
  - Office - Adding Additional Documents to Statement Email
  - Office - Cash/Check - Member Payments
  - Office - Bank ACH - Member Payments
  - Office - Credit Card - Member Payments
  - Office - Cash Receipt Wizard - NACHA Payments
  - Office - Cash Receipt Wizard - Non-Member Payments
  - Office - Credit Book
  - Office - POS Batch Processing
  - Office - Member Charges
  - Office - Invoice Transfer Wizard
  - Office - Billing Schedules
  - Office - Installment Billings
  - Office - Rentals
  - Office - Minimums
  - Office - Late Fees
  - Office - Member Payment Transfer Wizard
  - Office - Bulk Maintenance Notification Types
  - Office - Custom Fields
  - Office - Membership Videos
- Office - Templates

## Office - Point of Sale

- Office - Mobile POS
  - Office - Mobile POS - User Guide
  - Office - Mobile POS - Mobile Tee Times Check-In/Settlement
- Office - Manage Areas - POS F&B Areas
- Office - Manage Areas - POS Retail Areas
- Office - Manage POS Devices - POS Terminal/Workstation Device Setup
- Office - Manage POS Devices - POS Receipt Printer Setup
- Office - POS Retail Manual
- Office - POS F&B Manual
- Office - POS System Tools
- Office - POS Gift Cards
- Office - POS Charge Settlement Types
- Office - POS ETS Credit Card Transactions
- Office - POS Openedge Credit Card Transactions
- Office - POS Rain Checks
- Office - POS - Setting Terminal Value (ETS)
- Office - POS Split Ticket Manual
- Office - POS Messages
- Office - POS - Kiosk - Member Self-Service Options
  - Office - Kiosk Mode - Configuration
  - Office - Kiosk Mode - Member Check-In
  - Office - Kiosk Mode - Tee Times Integration
- Office - POS - Screen Group Designer
- Office - Point of Sale Setup Videos
- Office - Retail Point of Sale Videos
- Office - Wait Staff Training Videos

## Office - IT

- Office - Installing Office (CMA/POS) on Local Workstations - Onsite Server
- Office - RDP Setup - Hosted Server
- Office - Uninstalling CMA/POS
- Important Notification - Windows 10 Update to Version 1803
- Setting Up ETS in Office and POS

## Office - PayCloud

- [Office - PayCloud Admin Guide](#)
- [Office - PayCloud - Gofer Administration](#)
- [Office - PayCloud Member Guide](#)