

# Office (12.17.18) Release

Office - Release Notes

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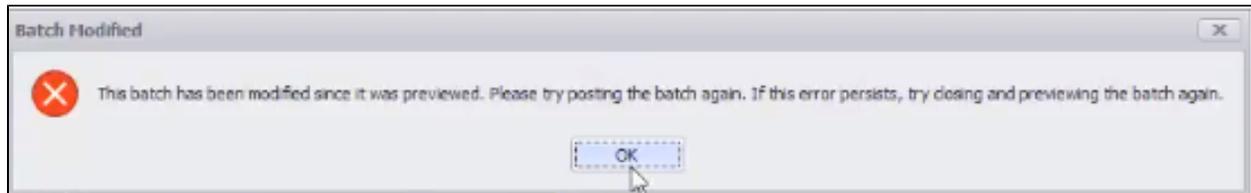
## Enhancements

### Accounts Payable

#### Batch Preview

- **Added additional consistency checks when previewing and posting Batches in CMA.**

Use Case: Previously, Users were able to preview a Batch, then make changes, but the changes would not be posted. Now, if Users leave a Batch in preview mode, make changes that impact the batch and then try to post it, they are prevented from doing so, with a working message, until the batch is updated and previewed again.



### Interactive Reporting

#### Guest Room Housekeeping Report

- **New Guest Room Housekeeping Report has been added that details New Arrivals, Departures, Turnover, and Stay Overs for any given day.**

Use Case: Previously, the Reporting Dashboard did not include a detailed breakdown of the New Arrivals, Departures, Turnovers, and Stay Overs for Guest Rooms. Now, with the new Guest Room Housekeeping Report, Users can see when Members arrive, depart, or if there are changes in the length of their stay, for any given period of time.

Manage Members Reporting Dashboard System Settings Guest Room Dashboard Approve Charge Batches

Home Housekeeping

Report Settings: (Default) Save Current Settings Delete Selected Setting Make Public Setup Email Delivery

Report Date: 12/11/2018  Enable Turnovers  Enable Stay Overs  
 Show Notes  Enable New Arrivals  Enable Departures

Clubessential Development Club  
Housekeeping Report  
Report Date: 12/11/2018

### Turnover

Room	Arrival Date	Arriving Occupants	Departure Date	Departing Occupants	Notes
04-ROW	12/11/2018	[M]Thomas, Steven	12/11/2018	[M]Anderson, Shepherd	*Arrival Notes: * - *Departure Notes: *

### New Arrivals

Room	Arrival Date	Arriving Occupants	Departure Date	Notes
04-MOR	12/11/2018	[M]Thomas, Margaret	12/12/2018	

### Stay Overs

Room	Arrival Date	Arriving Occupants	Departure Date	Notes
04-MON	12/10/2018	[M]Williams, Dave	12/13/2018	

### Departures

Room	Arrival Date	Arriving Occupants	Departure Date	Notes
04-CHA	12/10/2018	[M]Anderson, Jeff	12/11/2018	

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## Outstanding Voucher Report

- **New Outstanding Vouchers Report has been added that shows all outstanding Vouchers as of a specific date.**

Use Case: Previously, the functionality did not exist to see a report of all outstanding Vouchers. Now, the new Outstanding Vouchers Report shows all outstanding Vouchers as of a date chosen by the User. This report functions similarly to the Outstanding Credit Book Report and the Outstanding Gift Card Report. This report can be grouped by Member or by Voucher, as seen below.

### Member:

When viewing Vouchers by Member, the Member will be listed and the line can be expanded to see all Vouchers associated with that Member.

Manage Members Reporting Dashboard System Settings Guest Room Dashboard Approve Charge Batches

Home Housekeeping Outstanding Vouchers

Report Settings: (Default) Save Current Settings Delete Selected Setting Make Public Setup Email Delivery

As Of Date: 12/11/2018 Group By: Member Include Expired

1 of 1 100% Find Next

**Clubessential Development Club**

Outstanding Vouchers Report

As Of Date: 12/11/2018



Member	Voucher Name	Date Sold	Expiration Date	Sold Quantity	Remaining Quantity
[SC41040] Thomas, Charles				10	5
[RCE111] Brett, Stephanie				30	30
[RC15] Davis, Olivia				10	10
[SC25200] Anderson, Alex				10	5
[SC3275] Anderson, Tom				10	7
[133C] Duane, Jane				10	8.5
<b>Totals</b>				<b>80</b>	<b>65.5</b>

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Voucher:

When viewing by Voucher, the line can be expanded to show each Member that has that specific Voucher

Manage Members Reporting Dashboard System Settings Guest Room Dashboard

Home Housekeeping Outstanding Vouchers

Report Settings: (Default) Save Current Settings Delete Selected Setting Make Public

As Of Date: 12/11/2018 Group By: Voucher Include

1 of 1 100% Find

**Clubessential Development Club**

Outstanding Vouchers Report

As Of Date: 12/11/2018



Voucher Name	Member	Sold Quantity	Remaining Quantity
[Voucher Pack]		80	65.5
<b>Totals</b>		<b>80</b>	<b>65.5</b>

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## Marketing - Templates

- **Enhanced features in the Marketing Template Editor allows for Users to add a Total Statement Snippet.**

Use Case: Previously, Total Statement snippets were unavailable when sending a Statement Email to a Member. Now, a new snippet has been added for Users to include in the Statement Email to the Member that will show the Member their Total Statement Balance.

## Mobile POS (Pilot Clubs Only)

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

## Tee Sheet Integration

- **Enhanced Tee Sheet Integration; displaying the Reserver of the group, differentiating between Guests and Members by font color, and various other changes.**

**Please Note:** This only affects clients piloting the Mobile POS Admin Tee Times Check In feature.

Use Case: Tee times made in the Clubessential Tee Sheet can now display in Mobile POS for Staff to Member charge or open a ticket from their tablet and email the Member a receipt if they choose, facilitating check in/charging from the 1st tee.

The screenshot displays the 'Tee Times' interface in Mobile POS. At the top, there are three tabs: 'OPEN TICKETS', 'TEE TIMES', and 'CLOSED TICKETS'. Below these is a navigation bar with days of the week: 'TODAY Dec 13', 'FRIDAY Dec 14', 'SATURDAY Dec 15', 'SUNDAY Dec 16' (selected), 'MONDAY Dec 17', 'TUESDAY Dec 18', and 'WEDNESDAY Dec 19'. The main content area is titled 'North - Sunday, Dec 16' and shows a grid of tee times. The grid has columns for different groups and rows for different tee time slots. Each cell in the grid contains a name, a tee time, and a fee. For example, at 7:50 AM, Dave A is in the first column with a fee of \$22.00, and three 'Guest TBA' entries are in the other columns. At 8:00 AM, John Abbott is in the first column with a fee of \$22.00, Sara Abbott is in the second column with a fee of \$22.00, and Stephanie Leli, David Leli, and Norman Leli are in the first, second, and third columns respectively, with fees of \$22.00, \$22.00, and \$22.00. At the bottom of the screen, there is a '+ NEW TICKET' button and an 'EXIT' button.

## Advanced Split

- **Enhanced Advance Split capabilities for Tickets in Mobile POS.**

Use Case: Previously, when a ticket had no items, it would need to be deleted. Now, the system recognizes when a Ticket has no items (a zero balance), and will delete the Ticket automatically.

The first Ticket shown below, ticket #387, no longer has any items left after the split.

CHANGE MEMBER	Q	Name	Price	S	C	Ticket #387	New Ticket	New Ticket
Split by Multiplier 2 SPLIT ITEM SPLIT TICKET Split DOLLAR SEAT	1	Apple Pie	\$5.25	1	3	Anderson, Alex [SC25200] Sub: \$0.00	Anderson, Alex [SC25200] 1 Apple Pie 1 Apple Pie Sub: \$9.46	Anderson, Alex [SC25200] 1 Apple Pie Sub: \$4.73
		- Apple Pie	(\$0.52)					
	Subtotal: \$4.73							

When reviewing the Tickets to close or cash out, Ticket #387 no longer exists, it has been deleted due to a zero balance.

Anderson, Alex Table: BV-36, BV-0716	
389 - Anderson, Alex	
389 - Anderson, Alex	
390 - Anderson, Alex	\$5.25 >
- Discount: Apple Pie	(\$0.52)
1 Apple Pie	\$5.25 >
- Discount: Apple Pie	(\$0.52)
<b>Tip</b>	<b>\$0.00</b>
<b>Subtotal</b>	<b>\$9.46</b>

## Bug Fixes

- Fixed an issue with Approving Payment Batches occurring when the transaction date was changed, the Vendor Invoice paid date remained the same.
- Fixed an issue where statement data would not appear in PayCloud for clubs with a unique Statement Month Ending Day.
- Fixed an issue where the quick Cash settlement button in Mobile POS would not respect area-level settings.
- Fixed an issue when overpaying for a ticket with cash in Mobile POS and the settle chit was not properly showing the Change Due.

## Downloadable Guide