Troubleshooting Synchronization to Office

Overview

Learn to troubleshoot **Events** syncing into **Office** and **closing events** in **Banquets** by reviewing these areas in **Banquets: Market Type, Contacts, Payment, Importing an Event, and checking Corrections After Closing.**

Content

Batches With Charges Going to Incorrect Accounts

Market Type

Use the **Market Type** to denote if the **event** is a **Member** or **Non-Member event.** This will add the event to the correct Office **Area.** The Office **Area** is used to send the charges to **Item Group Overrides.**

To access the **Market Type** navigate to **System > System Settings > Partner Products > Reserve Gateway**. Once in the **Gateway** settings, the **Revenue Centers** lists the **Market Type tab**, which will show the areas being used for the various **Market Types** in **Banquets.** Those areas will follow the **group override settings** for the **Items** listed in the **Revenue Centers Tab**. Keep this setting in mind when troubleshooting any **batches** that **show charges going to incorrect accounts.**

Contact Missing Financial Data in Office

Contacts

 If the **contact** is **not a member in Office**, the **financial data** from the **event will not push into Office**.

Check for a **membership number** in the **contact record** by **clicking** on your **contact** > **scroll down** to the **Membership line.** If there is **no membership number** in the **Membership line,** then the contact is not a member and **financial data** will **not push over.**

To verify if a member is in Office go to the **Contact**, then **click** on the **member's name** to access their **profile.** If the **owner** says **your club name followed by GATEWAY_AGENT,** and there is a **member number under Membership #,** then the contact's **financial data** was **pushed** from **Office.**

 If these settings are correct, please contact support to troubleshoot further.
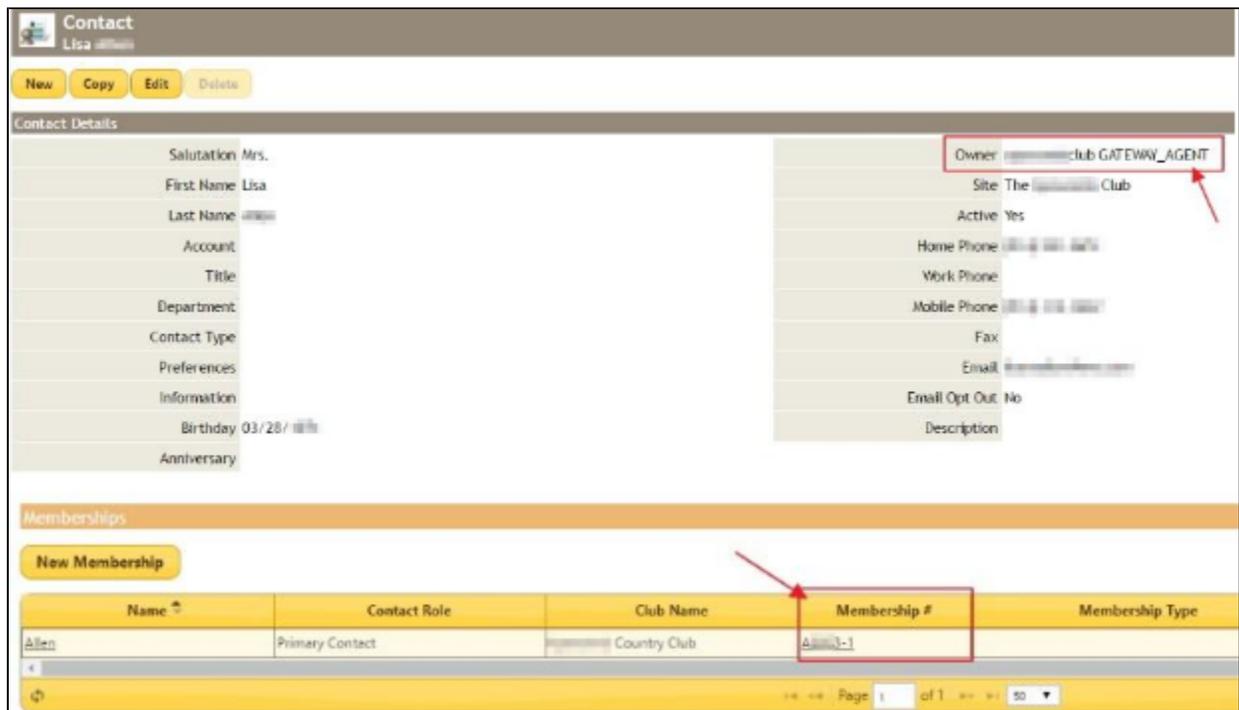
Verify Payments Are Syncing to Office

Payment

You can determine if **payments sync to Office** when you **record a payment.** To do this **click on Event > View Financial Details > Record Payment.**

Payments can be set up using: **Cash, Checks, Credit Cards, or a Member Charge.**

1. **Cash -** check your club's procedure for cash handling before enabling the **cash** method.
2. **Check -** if you're recording a **check**, be sure to put the **check number** in the **Payment Description box.**
3. **Credit Card -** you will NOT be able to **process a credit card in Banquets.** Using the **Credit Card** feature in **Banquets** just marks the **payment** as received by **credit card** for **record keeping**. In order to **charge** a **Credit Card**, you must first speak with your Controller to verify your club's process. Some clubs may **run cards in the back office**, while others will **process** the **credit card** u sing a **POS**.
4. **Member Charge -** this is a way to indicate in **Banquets** that **payment** has been charged to the **member account** in **Office.**

Missing Imported Payments

Importing a Payment

If you have an **payment** listed in the **Reserve Gateway Transaction Log**, but you DO NOT see it flagged as **imported** or in **Approv ed Payment Batches**, you will need to **manually import** the **payment**. To do this, **select** the **event** then **click** the **blue arrow** for **Sy nchronize Selected**. This will create the the **payment batch** in **Office**.

Missing Imported Events

Importing an Event

If you have an **event** listed in the **Reserve Gateway Transaction Log,** but you **DO NOT** see it **flagged as imported** or in **Approved Charge Batches**, you will need to **manually import the event**. To do this, **select** the **event** then **click** the **blue arrow** for **Synchron**

ize Selected. This will create a **charge batch** for the **event** in **Office.**
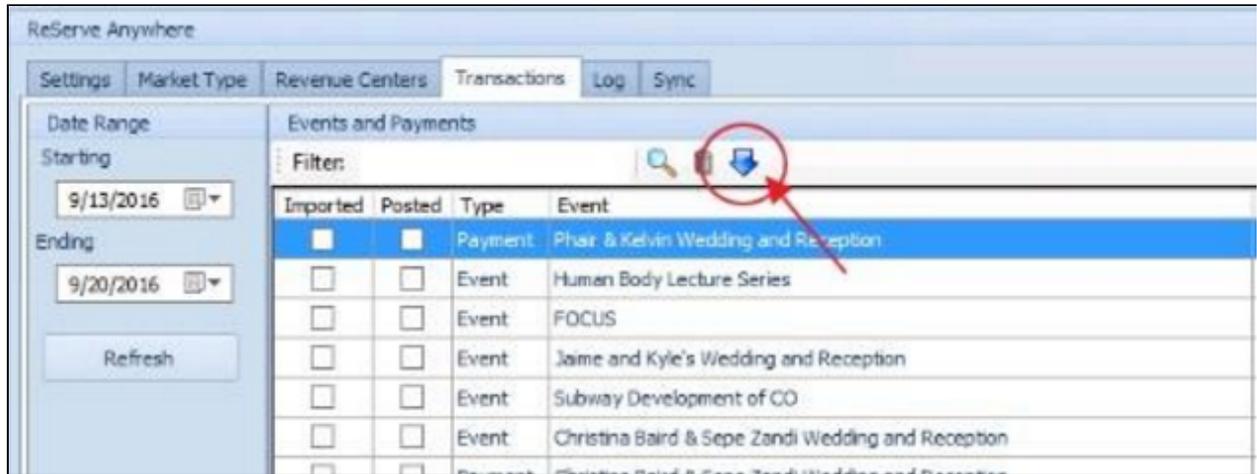
Making Corrections After Closing

Corrections

You can make changes to a **closed event** at any time.To do this, access the **closed event** and make updates as needed. Once the changes are made, the **event** will need to be **re-imported into Office.**

Posted Events in the Gateway

Events Flagged as Posted

If the **event** is **flagged as posted** in the **gateway**, your **Accounting** team will need to **un-post** it.

To **delete** the **event** from the **gateway**, click on **System > System Settings > Partner Products > Reserve Gateway > Transactions tab > Select the event > Click the gray trashcan**. This will cause the **check** in the **imported box** to disappear (the event will still be in the list). After making the needed changes in **Banquets**, **re-import the event** (follow above directions for importing). This will **create** a **new batch** for the **event.**

Events With Multiple Functions

Check for Accurate Billing

If your event has multiple functions you will see multiple listings for your event in the Gateway Transactions. Make sure to check each to ensure that each function is billed correctly.
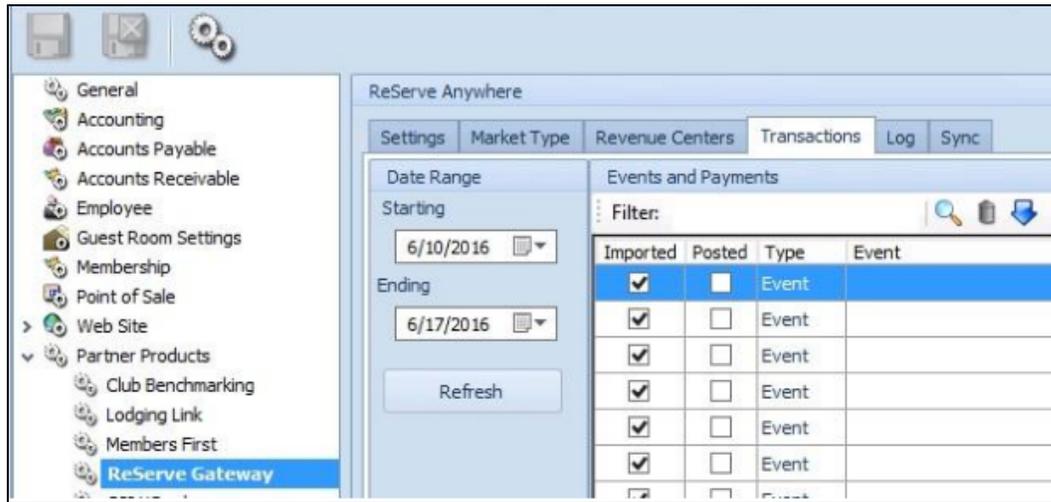
Private Events vs. Club Events

Charging Multiple Payees

The **Banquets & Catering** system is used for **events** that **charge** to **one member account in Office**, such as a **Corporate Event** or **Wedding**.

To **charge** for **Club Events** with **multiple attendees/payees**, such as a **New Year's Eve Gala** or a **Mother's Day Brunch**, **servers** would **create POS tickets** for the **individual member charges** or you could **set up an event in Event Manager** on your Clubessential **website calendar** and **individual POS tickets** would be **automatically created for each attendee.**

It is still recommended to use the **Banquets & Catering software** to **schedule Club Events** on your **calendar, add service details** to the **event,** and to **produce internal event orders.**