



# Area Groups

2017 - Spring Edition

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# Overview

Although Area Groups are set up during Implementation, it is good to have an understanding of their functionality. Primarily, Area Groups are used to group Areas for POS Batch Reporting purposes. This keeps POS Batch Reporting clean and easy to track. For instance, by creating a Food & Beverage Area Group that is linked to all F&B Areas, the user will only have one batch to post at the end of the day, rather than numerous batches. As you will see, the Area Group shows as the Batch Location within Approved Charge Batches.

Furthermore, Area Groups are also applied within Credit Book Types. This tells the system which Areas Credit Book can be redeemed at the POS. Please see our [Credit Book](#) manual for more information on Credit Book Types.

Most Clubs will have a Food & Beverage Area Group along with a separate Area Group for each of their Retail Areas. This helps the client separate out Credit Book if they want separate Credit Book Types for each Area.

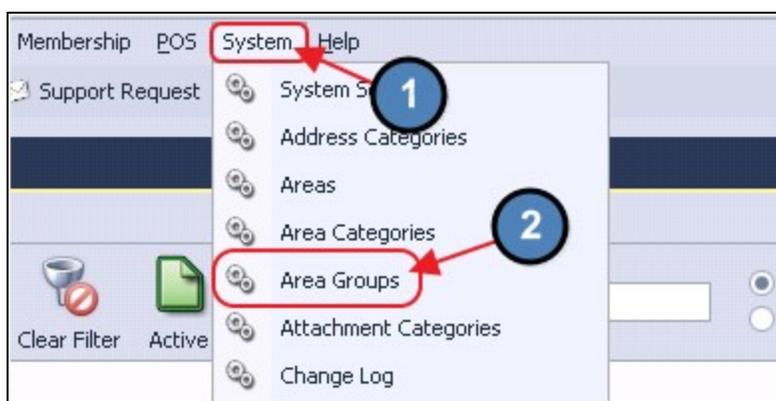
## Use Case(s)

- A Club set up a Food & Beverage Area, a Golf Shop Area, and a Courts Area when they originally went live a few years ago. Since then, they have opened a Spa, and due to the nature of the change, decided to set up a new Area Group for the Spa.

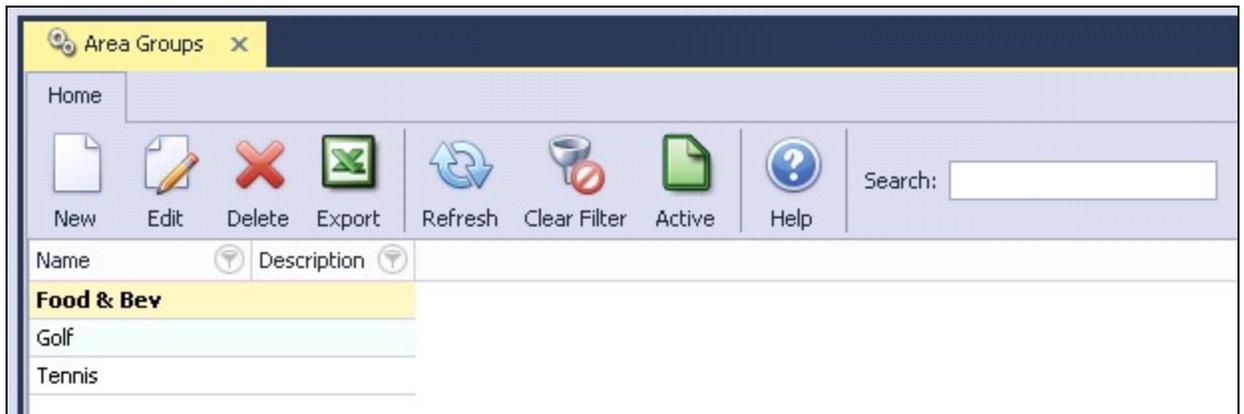
## Accessing the Tool

To access **Area Groups**,

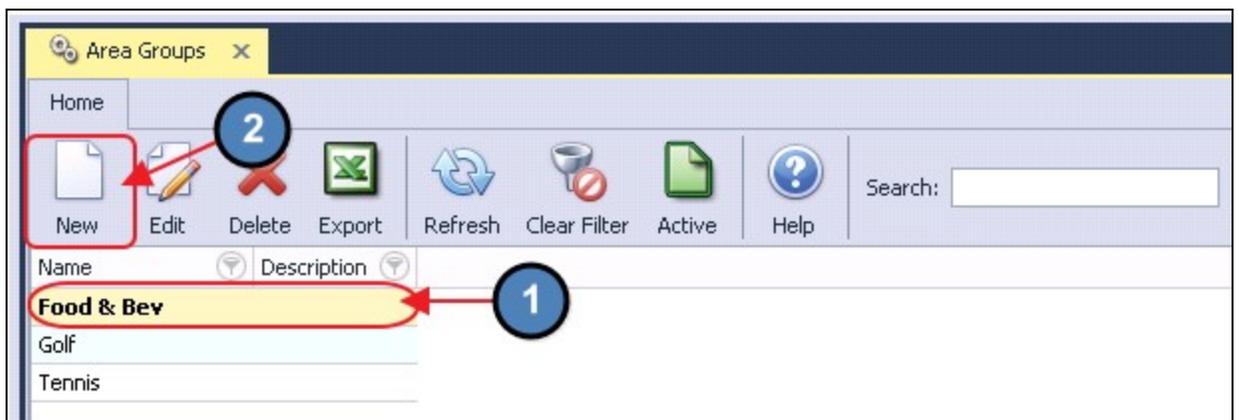
- 1) Navigate to **System** across the top toolbar and select **Area Groups**.



- 2) The **Area Groups Grid** will launch.

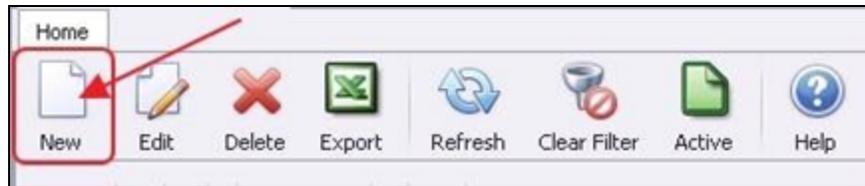


- 3) The primary functions associated with managing Area Groups are embedded in the Member Type setup screen, which can be accessed by double-clicking on an existing Group, or clicking the **New** button.

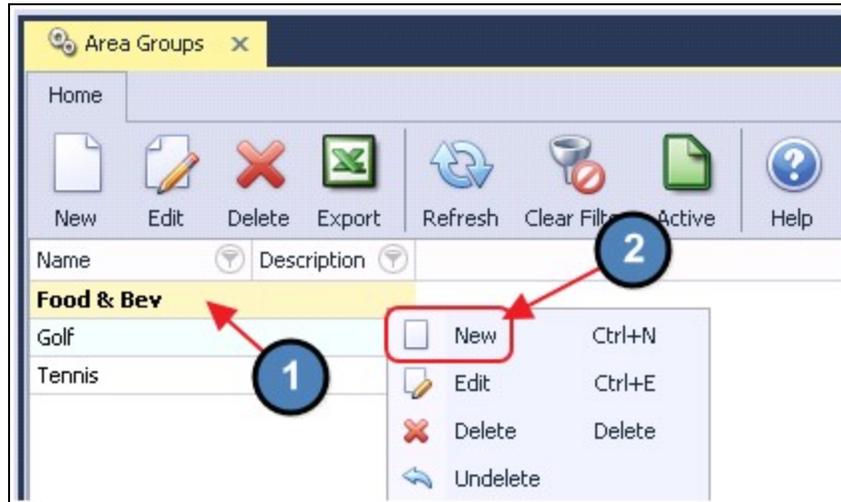


## Creating a New Area Group

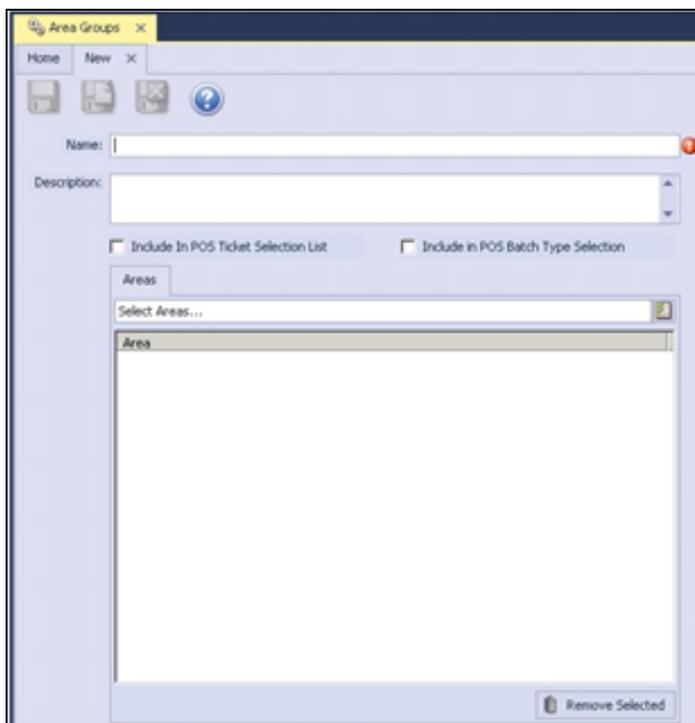
- 1) Navigate to the **Area Groups Grid** and perform either of the following to launch the Area Group setup screen:
  - a) Click the **New** icon on the toolbar.



b) Right-click anywhere on the Member Types Grid and select **New**.

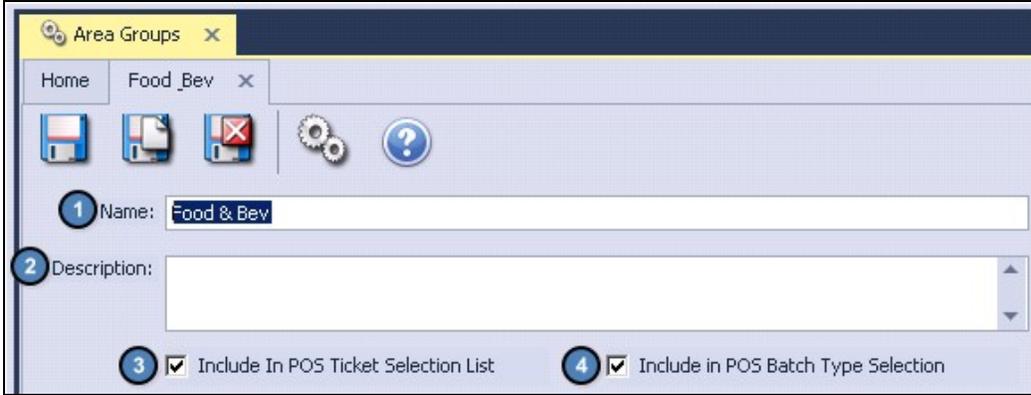


2) The **Area Groups** setup screen will launch.



## General Information

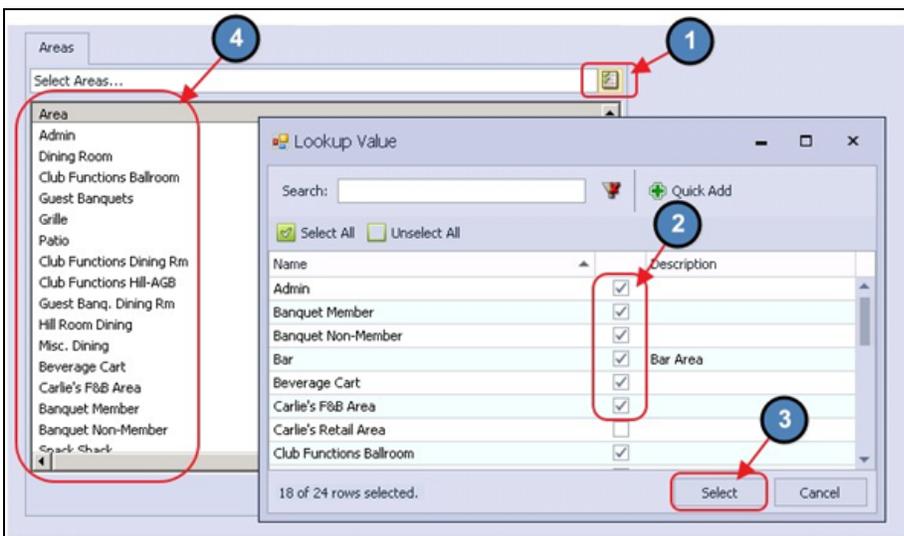
To set up an Area Group, begin by entering the following info/settings:



- 1) **Name** - Give the Area Group a name.
- 2) **Description** - An optional description can be added to the Area Group for internal purposes.
- 3) **Include in POS Ticket Selection List** - Must be checked for tickets completed through the Areas selected in the Area Group to show within the Open Tickets, and Closed Tickets section of System Tools in the POS.
- 4) **Include in POS Batch Type Selection** - Must be checked for the Area Group to group transactions completed through the Areas selected in the Area Group into one batch.

## Areas

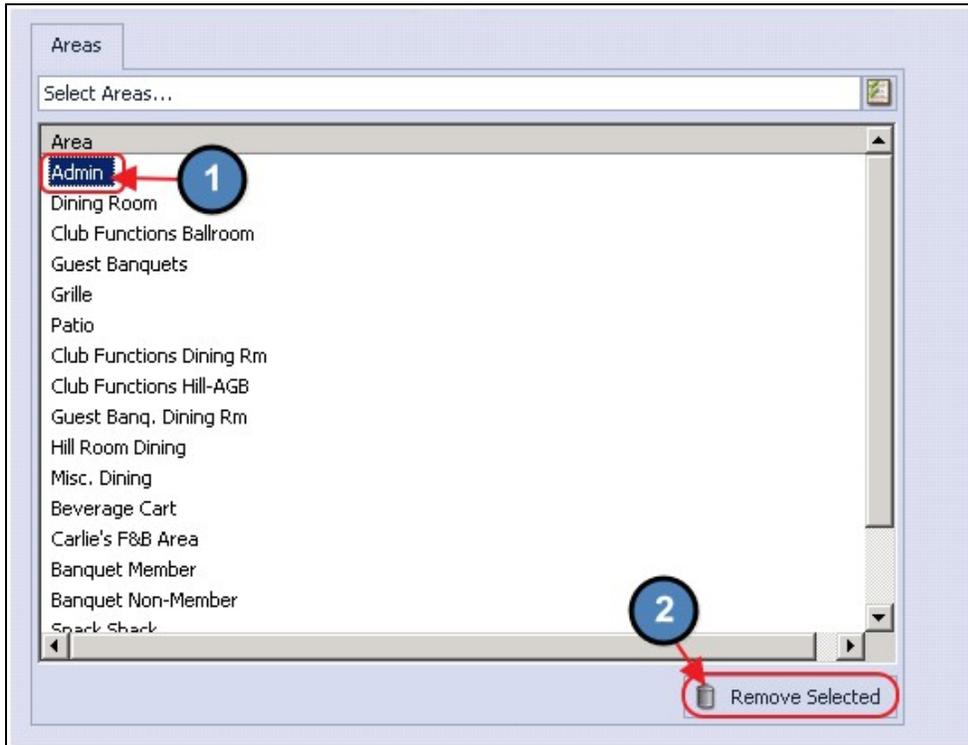
To add **Areas** to the **Area Group**:



Name	Description
Admin	<input checked="" type="checkbox"/>
Banquet Member	<input checked="" type="checkbox"/>
Banquet Non-Member	<input checked="" type="checkbox"/>
Bar	<input checked="" type="checkbox"/> Bar Area
Beverage Cart	<input checked="" type="checkbox"/>
Carlie's F&B Area	<input checked="" type="checkbox"/>
Carlie's Retail Area	<input type="checkbox"/>
Club Functions Ballroom	<input checked="" type="checkbox"/>

- 1) Click the **Lookup Value**.
- 2) Select the **Areas** that should be included in the Area Group.
- 3) When the appropriate Areas are selected, click **Select** at the bottom of the lookup value.
- 4) Selected Areas will then show within the Areas section.

To Remove an Area from the Area Group:



- 1) Highlight the Area from the selected Areas section.
- 2) Select **Remove Selected**.

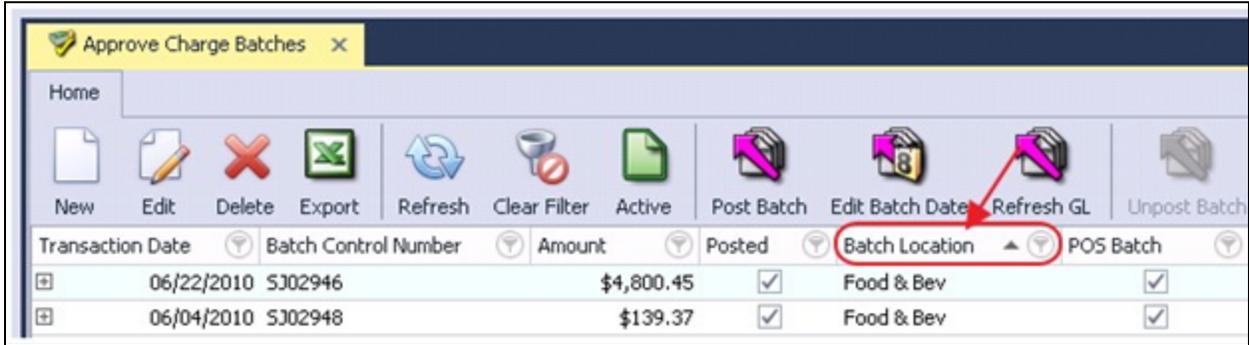
## Save & Close

When finished, click **Save & Close**.



## Approved Charge Batches

As mentioned, Area Groups are used to group POS transactions from multiple Areas into a single batch. For instance, if an Area Group titled Food & Bev has all F&B Areas selected within it, all POS transactions completed within F&B Areas will group into one batch for the day. The Area Group will show as the **Batch Location** within Approved Charge Batches.



Transaction Date	Batch Control Number	Amount	Posted	Batch Location	POS Batch
06/22/2010	SJ02946	\$4,800.45	<input checked="" type="checkbox"/>	Food & Bev	<input checked="" type="checkbox"/>
06/04/2010	SJ02948	\$139.37	<input checked="" type="checkbox"/>	Food & Bev	<input checked="" type="checkbox"/>

## Best Practices

- When determining whether or not to set up a new Area Group, determine whether a new Group is required to perform reconciliations easier, to allow better flow for Management review of transactions, and/or to enable a separate Credit Book from being established. If these answers are yes, it is likely that a new Area Group should be established.

## Frequently Asked Questions

### Can I consolidate Area Groups?

As long as the area is uniquely assigned to an Area Group, Areas may be re-assigned and/or consolidated to a different Group Area in an effort to accommodate Management or other Club changes since the original implementation.