

Office - 5.20.19 Release

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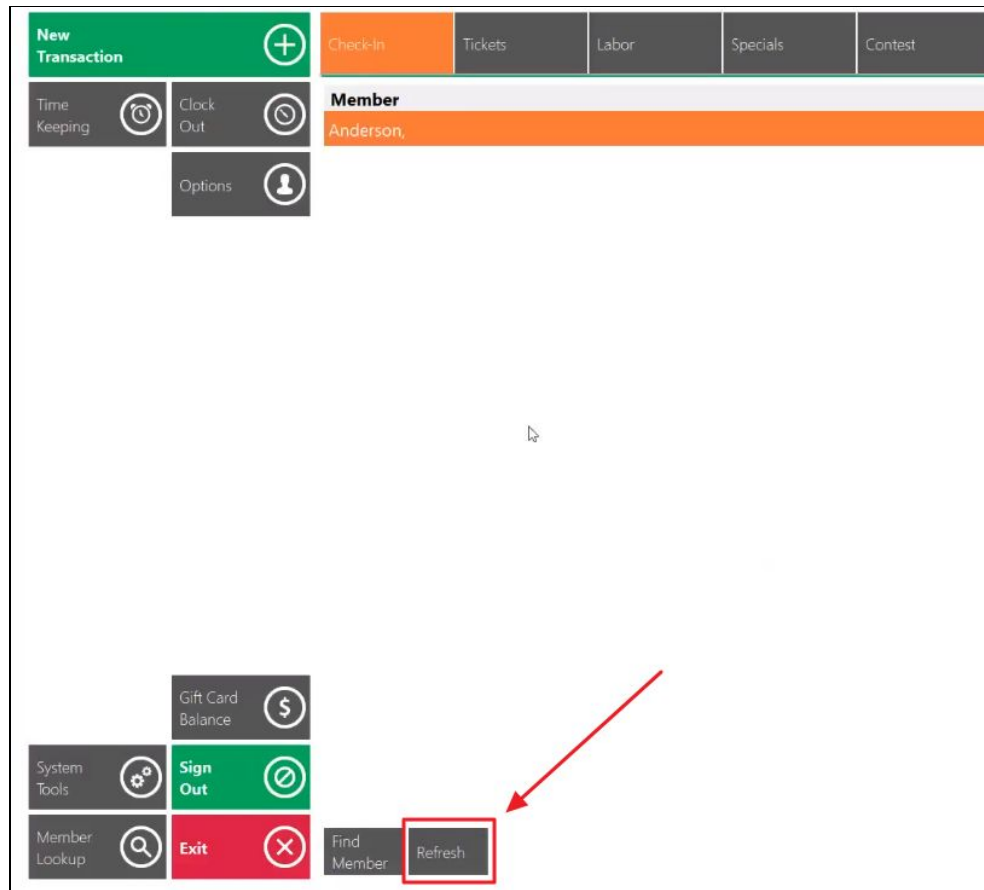
Enhancements

Classic POS

Member Check-In

- **Added a Refresh button to the Check-In tab in Classic POS.**

Use Case: Clubs who have a member facing check-in screen as well as a staff facing screen, can now easily Refresh the Member Check-In tab view for the staff facing screen, can now easily Refresh the Member Check-In tab view for the staff to see an up to the minute view of the latest activity generated by members checking in to club locations such as a fitness center.

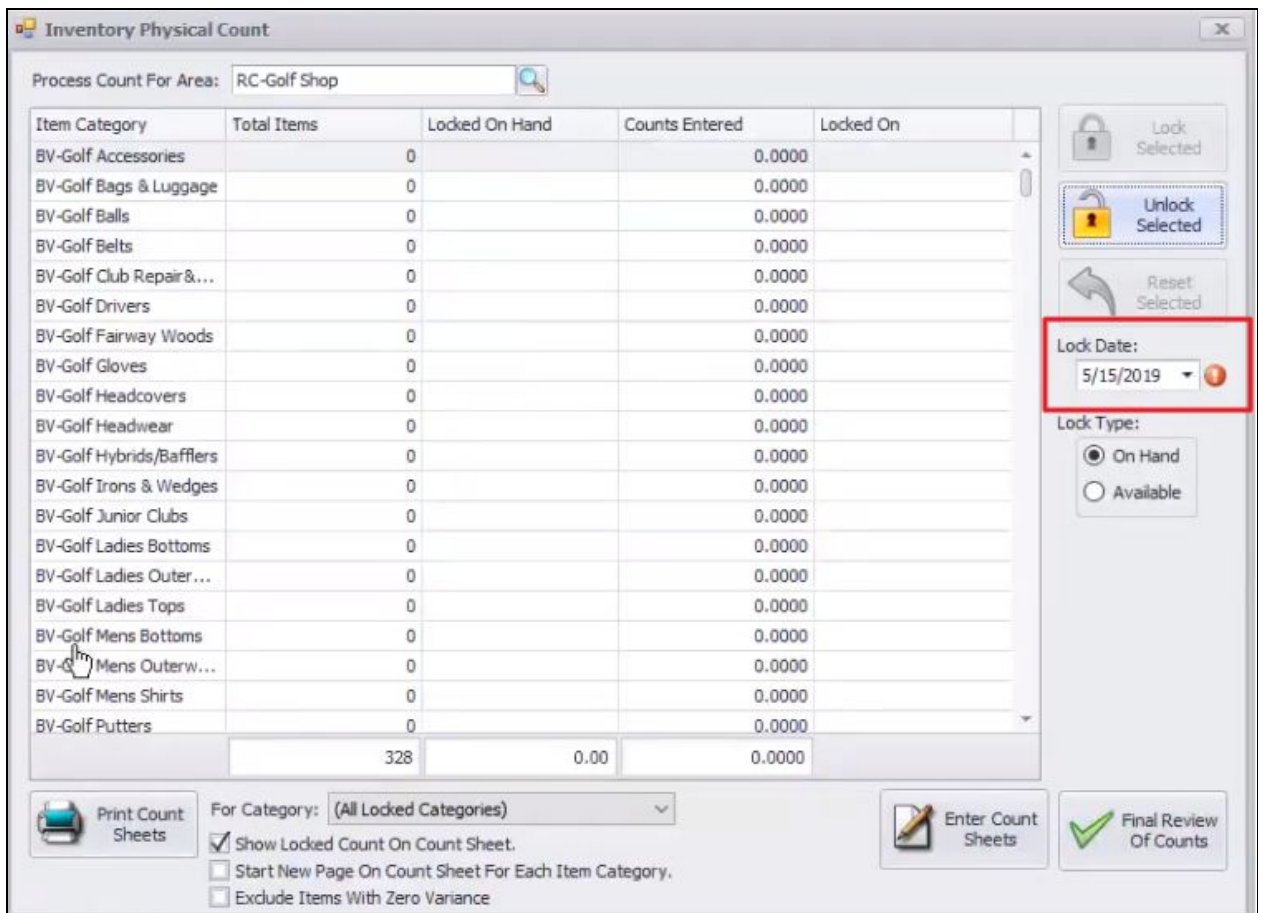


Items

Inventory Count Wizard

- Updated functionality now sets the Batch transaction date to the Lock Date specified.

Use Case: When running the Inventory Count Wizard in CMA and generating inventory Adjustment Batches, the system will now set the Batch's transaction date to match the Lock Date specified. Previously, the system used the current date as the Batch transaction date.



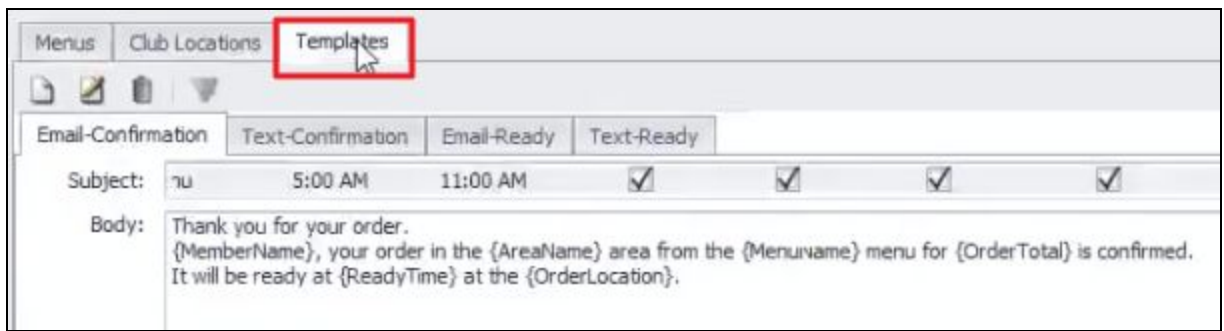
Item Category	Total Items	Locked On Hand	Counts Entered	Locked On
BV-Golf Accessories	0		0.0000	
BV-Golf Bags & Luggage	0		0.0000	
BV-Golf Balls	0		0.0000	
BV-Golf Belts	0		0.0000	
BV-Golf Club Repair &...	0		0.0000	
BV-Golf Drivers	0		0.0000	
BV-Golf Fairway Woods	0		0.0000	
BV-Golf Gloves	0		0.0000	
BV-Golf Headcovers	0		0.0000	
BV-Golf Headwear	0		0.0000	
BV-Golf Hybrids/Bafflers	0		0.0000	
BV-Golf Irons & Wedges	0		0.0000	
BV-Golf Junior Clubs	0		0.0000	
BV-Golf Ladies Bottoms	0		0.0000	
BV-Golf Ladies Outer...	0		0.0000	
BV-Golf Ladies Tops	0		0.0000	
BV-Golf Mens Bottoms	0		0.0000	
BV-Golf Mens Outerw...	0		0.0000	
BV-Golf Mens Shirts	0		0.0000	
BV-Golf Putters	0		0.0000	
	328	0.00	0.0000	

Mobile Ordering

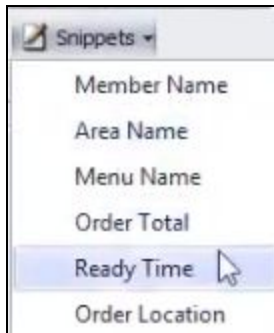
Custom Confirmations

- **Added ability for Users to customize the Confirmation and Ready Emails and/or text Messages for Mobile Ordering.**

Use Case: Within Area Information under POS Options then Mobile Ordering, there is a newly added tab called **Templates**. This houses Email and Text Message templates to be used for Confirmations during the Mobile Ordering process.



In addition to the pre-made Templates, Users can also add Snippets to further customize the experience.

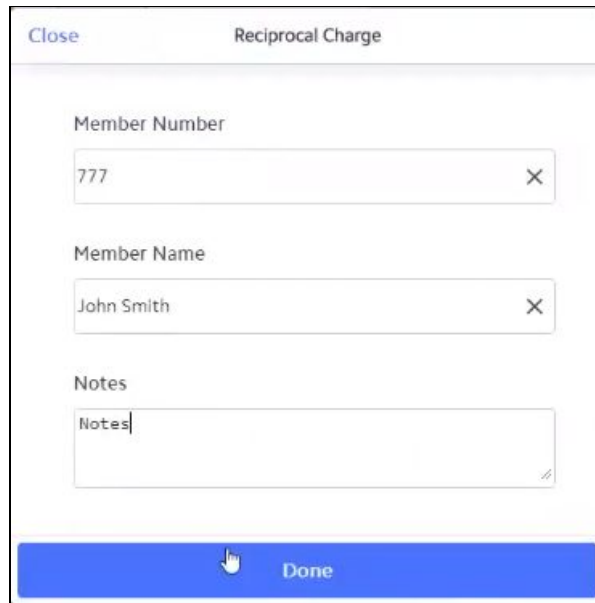


Mobile POS

Reciprocal Charge Support

- **Mobile POS now supports charges for Reciprocal Members.**

Use Case: Previously, Reciprocal Member information could not be entered in Mobile POS to charge. Now, upon selecting a Reciprocal Member to charge, Users will be prompted to enter their information.



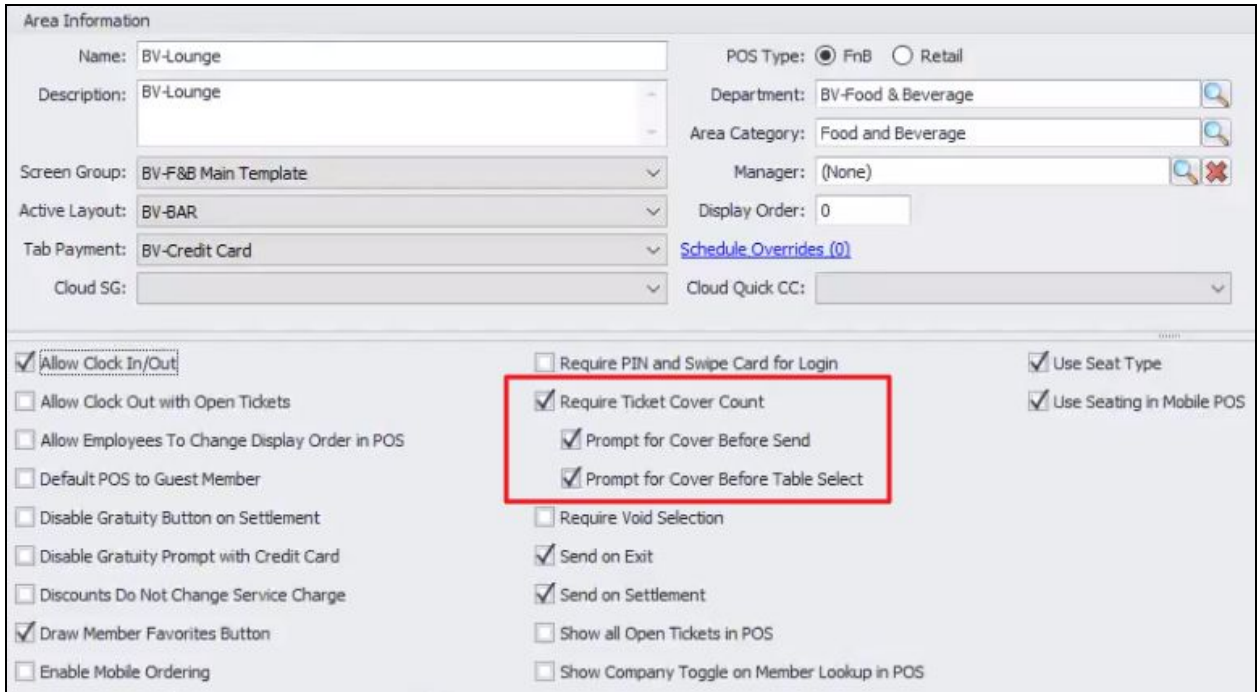
When the invoice is generated in CMA, Users will see all Reciprocal information entered in Mobile POS when viewing the Batch, as seen in the example below for Mr. John Smith.

100309		05/15/2019		SJ100395		\$13.26		BV-F&B		2 OfficeCloud		
ID	POS Ticket ID	Open	Billed Date	Description	Total	Amount Paid	Member Number	Settlement Type	Member Name	Table Name	Office Cloud Ticket Shared Key	Mobile POS Ticket Number
3680416		<input type="checkbox"/>	05/15/2019	[123] Laurel	\$6.63	\$0.00	CAP1124	BV-Cash	Thomas, Laurel Ridge		13276	755
3680...		<input type="checkbox"/>	05/15/2019	[777] John Smith	\$6.63	\$0.00	CAP1128	BV-Cash	Brett, Kenmore		13279	758
					SUM=\$13.26							

Require Cover Count

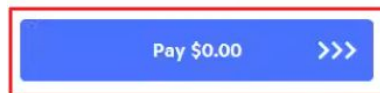
- **Added support for Require Cover Count prompt in Mobile POS.**

Use Case: Area settings in CMA now include options for Requiring Ticket Cover Count when in Mobile POS.

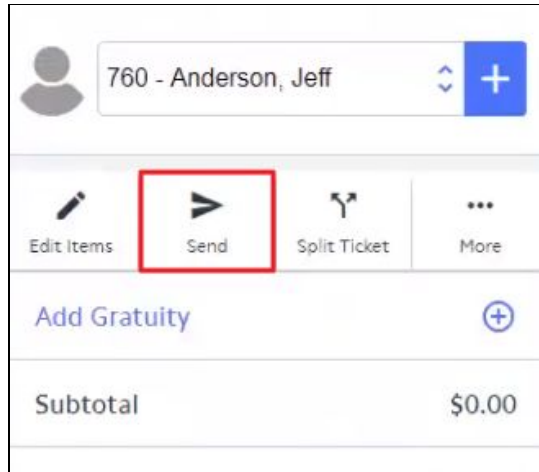


The screenshot shows the 'Area Information' configuration page for 'BV-Lounge'. The 'Require Ticket Cover Count' checkbox is checked and highlighted with a red box. Below it, the sub-options 'Prompt for Cover Before Send' and 'Prompt for Cover Before Table Select' are also checked. Other settings include 'Allow Clock In/Out', 'Require PIN and Swipe Card for Login', 'Use Seat Type', and 'Use Seating in Mobile POS'.

- **Require Ticket Cover Count** - Cover Count Prompt shows upon selecting **Pay**.



- **Prompt for Cover Before Send** - Cover Count Prompt shows upon selecting **Send**, when sending items to the kitchen.



- **Prompt for Cover Before Table Select** - Cover Count Prompt shows when selecting a **Table** to begin an order.

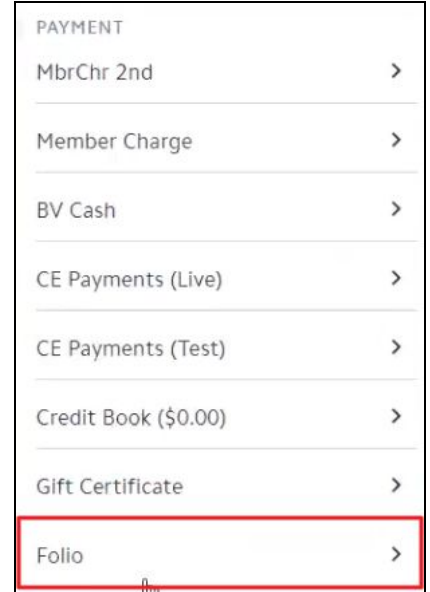


Settle to Folio

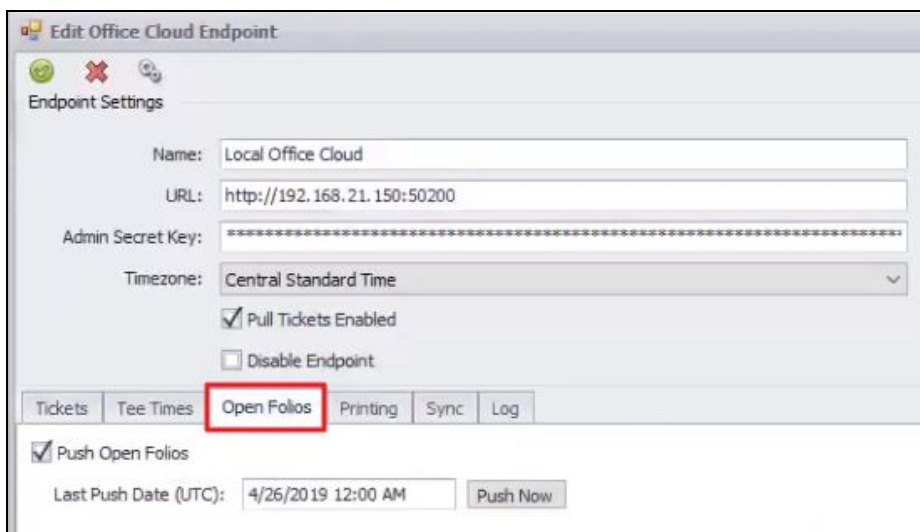
- **Added the ability to Settle to Folio in Mobile POS.**

Use Case: New functionality allows Users to settle a Member Charge to a Folio from Mobile POS.

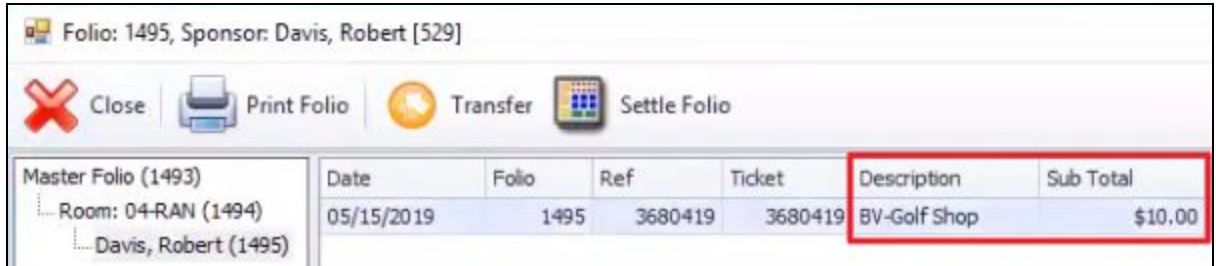
Please Note: *Mobile POS Syncs with Guest Rooms every two hours, in order to see current Folios before that window, please use the Reload Folios button at the top right of the Search for a Folio window, as seen below.*



Clubs utilizing the Rooms feature who wish to have this data integrated into the Mobile POS solution will need to have system settings turned on appropriately. To turn on the setting within CMA to allow for the push of fresh Folio Data, access **System Settings**, Office Cloud, and open the Endpoint. Select the **Open Folios** tab and ensure **Push Open Folios** is selected. Users can also use the **Push Now** setting from this menu to update the current Folio listing.



Folio charges from Mobile POS will show just like they would in Classic POS when viewing the Occupant in the Folio, all charges will show, as seen below for our example Mr. Robert Davis.

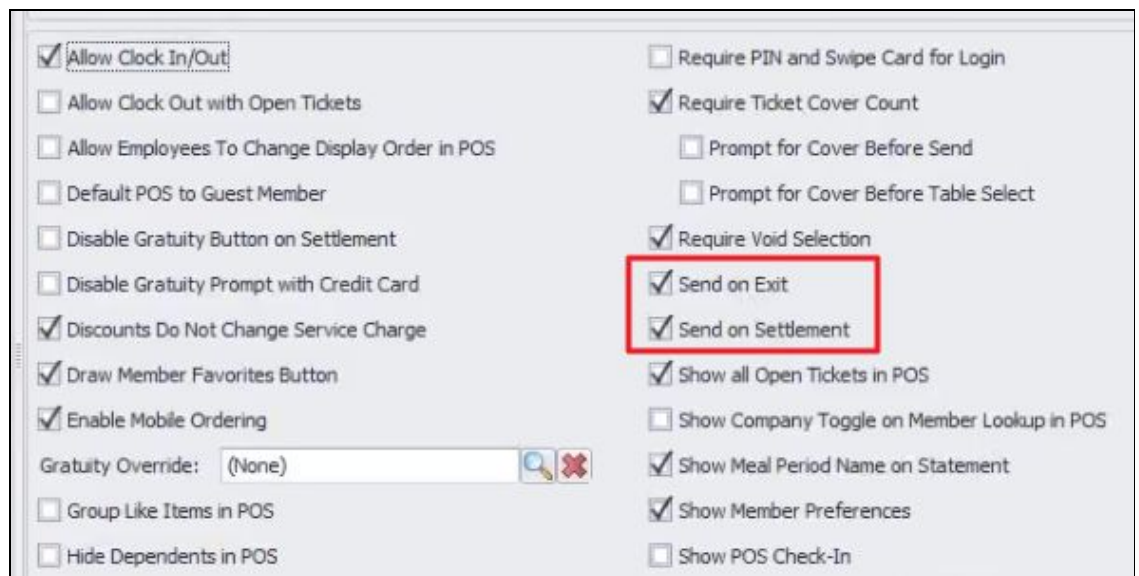


Master Folio (1493)		Date	Folio	Ref	Ticket	Description	Sub Total
Room: 04-RAN (1494)		05/15/2019	1495	3680419	3680419	BV-Golf Shop	\$10.00
Davis, Robert (1495)							

Send on Settlement

- **Added support for Send on Settle and Send on Exit features in Mobile POS.**

Use Case: Previously, when editing an Area within POS Options, Users were able to select **Do Not Require Send on Exit** which, when selected, would not prompt a popup to alert Users there were unsent Items on a ticket. Now, the verbiage reads **Send on Exit**, and when checked, Items will send automatically on exit with **no** prompt in Mobile POS. In Classic POS, settings will be adjusted appropriately by Clubessential for the change in verbiage. (If previously, unchecked, will now be checked with change in verbiage, and alert will still pop prior to being sent). In addition, the Send on Settle option is also available to send any remaining unfired items when the User settles the ticket.



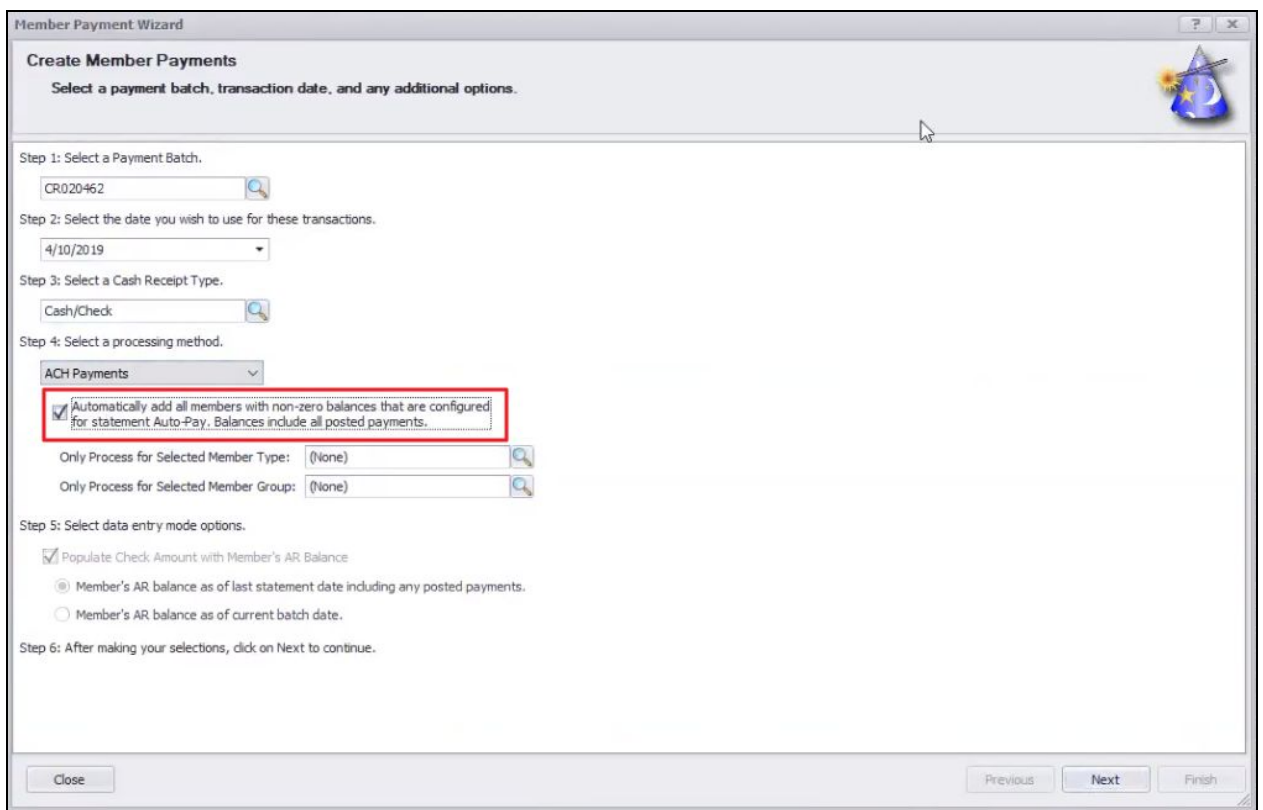
<input checked="" type="checkbox"/> Allow Clock In/Out	<input type="checkbox"/> Require PIN and Swipe Card for Login
<input type="checkbox"/> Allow Clock Out with Open Tickets	<input checked="" type="checkbox"/> Require Ticket Cover Count
<input type="checkbox"/> Allow Employees To Change Display Order in POS	<input type="checkbox"/> Prompt for Cover Before Send
<input type="checkbox"/> Default POS to Guest Member	<input type="checkbox"/> Prompt for Cover Before Table Select
<input type="checkbox"/> Disable Gratuity Button on Settlement	<input checked="" type="checkbox"/> Require Void Selection
<input type="checkbox"/> Disable Gratuity Prompt with Credit Card	<input checked="" type="checkbox"/> Send on Exit
<input checked="" type="checkbox"/> Discounts Do Not Change Service Charge	<input checked="" type="checkbox"/> Send on Settlement
<input checked="" type="checkbox"/> Draw Member Favorites Button	<input checked="" type="checkbox"/> Show all Open Tickets in POS
<input checked="" type="checkbox"/> Enable Mobile Ordering	<input type="checkbox"/> Show Company Toggle on Member Lookup in POS
Gratuity Override: (None)	<input checked="" type="checkbox"/> Show Meal Period Name on Statement
<input type="checkbox"/> Group Like Items in POS	<input checked="" type="checkbox"/> Show Member Preferences
<input type="checkbox"/> Hide Dependents in POS	<input type="checkbox"/> Show POS Check-In

Member Payment Wizard - PayCloud AutoDraft Integration

AutoDraft

- **Added support for Auto Draft in PayCloud.**

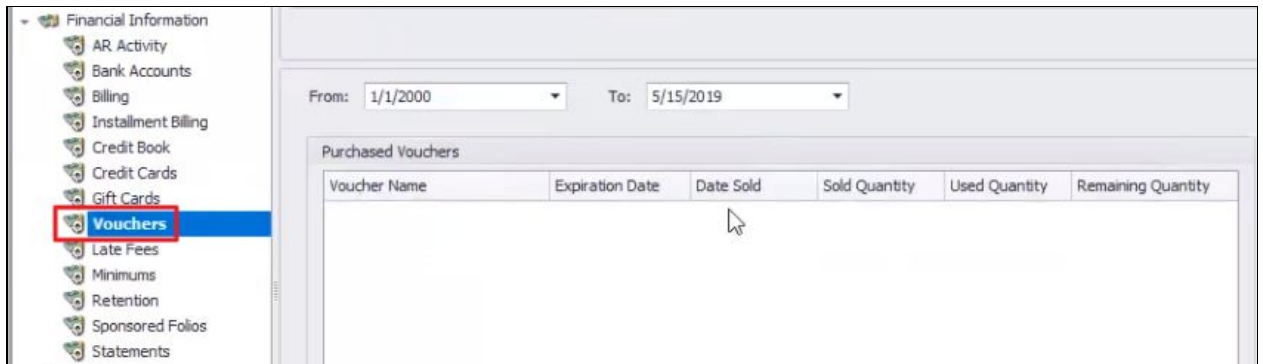
Use Case: Added support for Auto Draft in PayCloud. If a Member sets up Auto Draft in PayCloud then the Club runs the Member Payments Wizard in CMA and selects the option to automatically create payments for Members with an outstanding balance, Members who are set to Auto Draft in PayCloud will **NOT** have a payment created.



Vouchers

- **Added support for Office to sync voucher data to PayCloud.**

Use Case: Voucher details are now included in the information that syncs to PayCloud, including detail on Voucher Name, Expiration, Date Sold, Quantity Sold, Quantity Used, and Quantity Remaining, as seen below. This will allow for future display of Voucher data in Paycloud.



Bug Fixes/Other

- Fixed an issue when clicking on a category button in Mobile POS and the items in that category were not displaying on the Screengroup.
- Fixed an issue where credit book transactions in Mobile POS were not showing up properly in the Credit Book Transaction report in CMA.
- Fixed an issue where assigning a gift card to another member/guest in Mobile POS was not flowing back into CMA/Classic POS.
- Fixed an issue where send tickets in Mobile POS were not printing in the same order as they appeared on the screen.
- Fixed an issue where the lookup parameters in the Member Roster Export report in CMA were not saving.
- Enhanced settlement reporting integration for CE payments Clients.