Mobile POS: Tee Times Check-In/Settlement

2019 - Winter Edition

User Guide - Table of Contents

Overview

Tee Times can now be accessed via the new Mobile POS as well as in Classic POS. These options allow Staff the freedom to Settle Tee Time charges from anywhere at the club, even at the first tee, with seamless integration across platforms. This guide covers how Check-In and Payments works for both Mobile POS and Classic POS.

Please Note: *Classic POS is the main POS program; tickets created in either Mobile or Classic can be edited, closed, or reopened in Classic POS. Whereas Mobile POS tickets can only be accessed, closed, edited, or reopened **only** in Mobile POS.*

Use Case(s)

- Golf Staff wants to check in and settle Members at the first tee, creating a smoother more unified experience for Members and the Club.
- Golf Staff would like to continue to check in and settle Members from Classic POS in the Golf Shop.
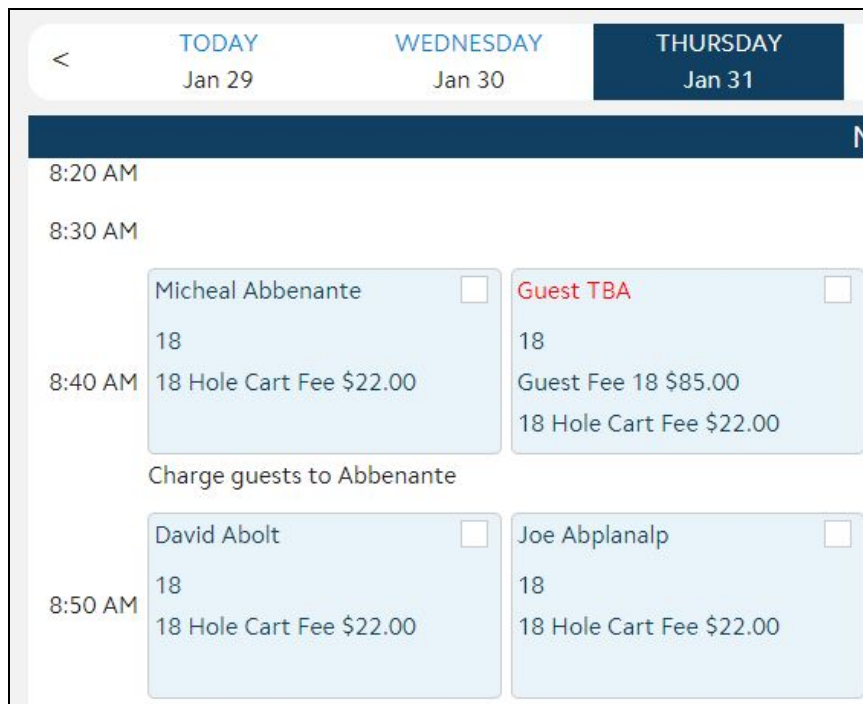
Mobile POS

To access **Tee Times** on **Mobile POS**, Users will click on the newly added **Tee Times** tab, as seen below in a retail Sales area. If you use the **Clubessential Tee Sheet** and you do not see this option, please contact us.

The **Tee Times** tab will open the weekly view of the Tee Sheet. Upcoming booked Tee Times will show here with all pertinent Reservation details. Click a day to switch dates. The tee time or individuals can be tapped to show the menu options to Create a Ticket or to Member Charge, as shown below.

Tee Time booking details include the Member or Guest Name, Round Length, Course Transportation Fees, and any Greens Fees or Guest Fees, as seen below.

Tee Times shown in **blue** mean that they have not been charged yet.

Please Note: *While Classic POS knows which reservations were paid for in Mobile POS, previewing a ticket that was generated in Mobile POS, must be done through Mobile POS itself.*

## Check-In and Charge

To **check-in and charge** a Member or Guest, Staff has two options:

1. Select individual players by tapping the **checkbox** to the right of the Player's name.
2. Tap the **time** listed on the left, which will select all Players for that specific tee time.

Payments

Payments can be handled by **Member Charge** or **Creating a Ticket**.

Member Charge - This option will allow the User to select multiple Members, select Member Charge, and the system will then create a ticket for each Member and charge the ticket to the corresponding accounts.

Create Ticket - This option will create one ticket for each Tee Time and assign it to the reserving Member or first Member on the Tee Time. The Member can be changed from Mobile POS Payment screen. To change the member, click the + sign and choose Change Member.
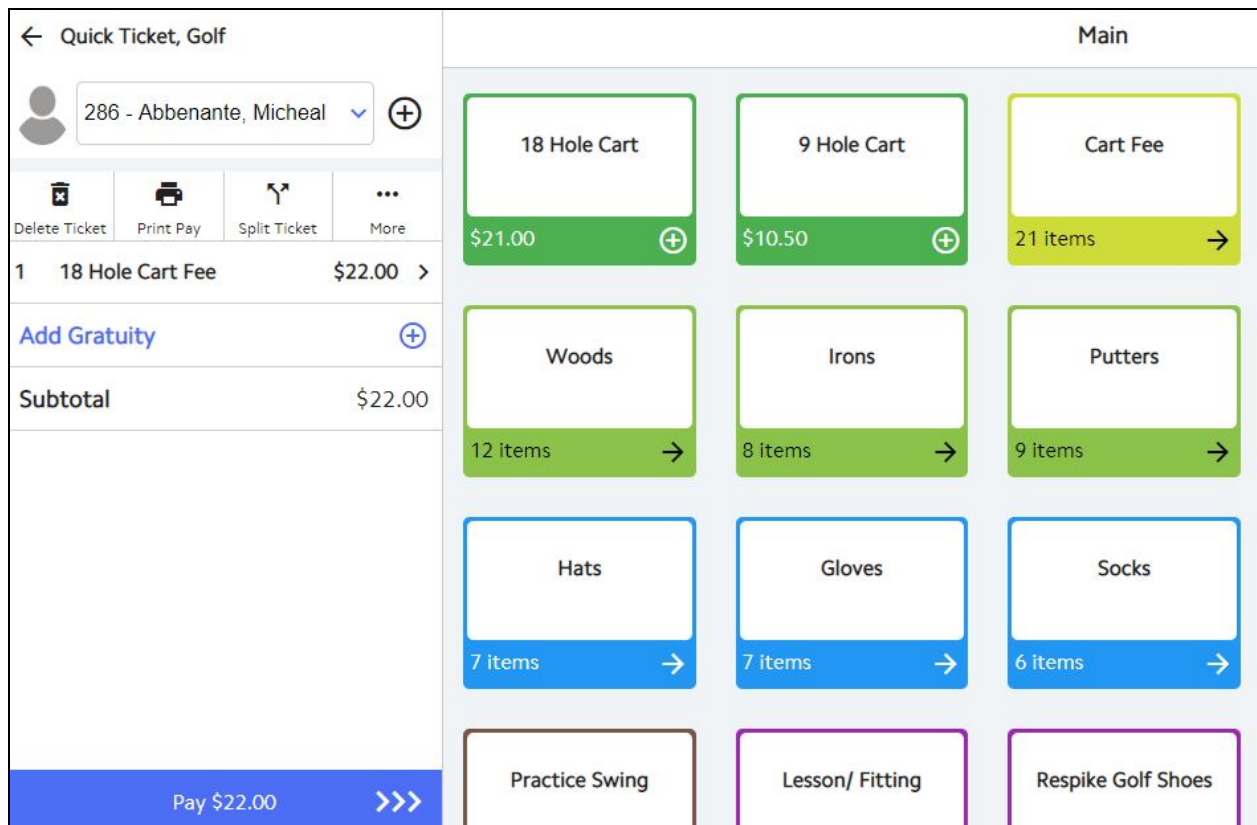
Once Members are Paid in Mobile POS, their booking will now appear in **yellow** on the Tee Times

tab. If the booking has not yet been paid it will reflect in **blue** here.

Tickets that have been paid in Classic POS will show here in **gray**. There is no check box for these as you are not permitted to take action on these within the Mobile POS-only in Classic POS where it was settled.
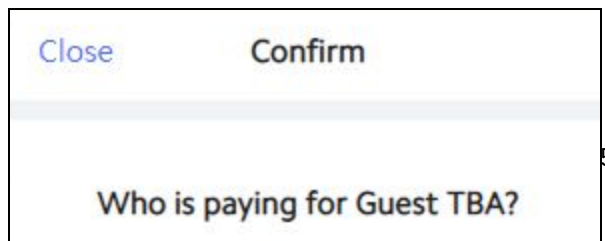

All settled Tee Times are reflected on the Full Site Tee Sheet with a green dollar sign showing they have been paid, as seen below.

Please Note: *Tee Times that have not been settled will show the red dollar sign.*

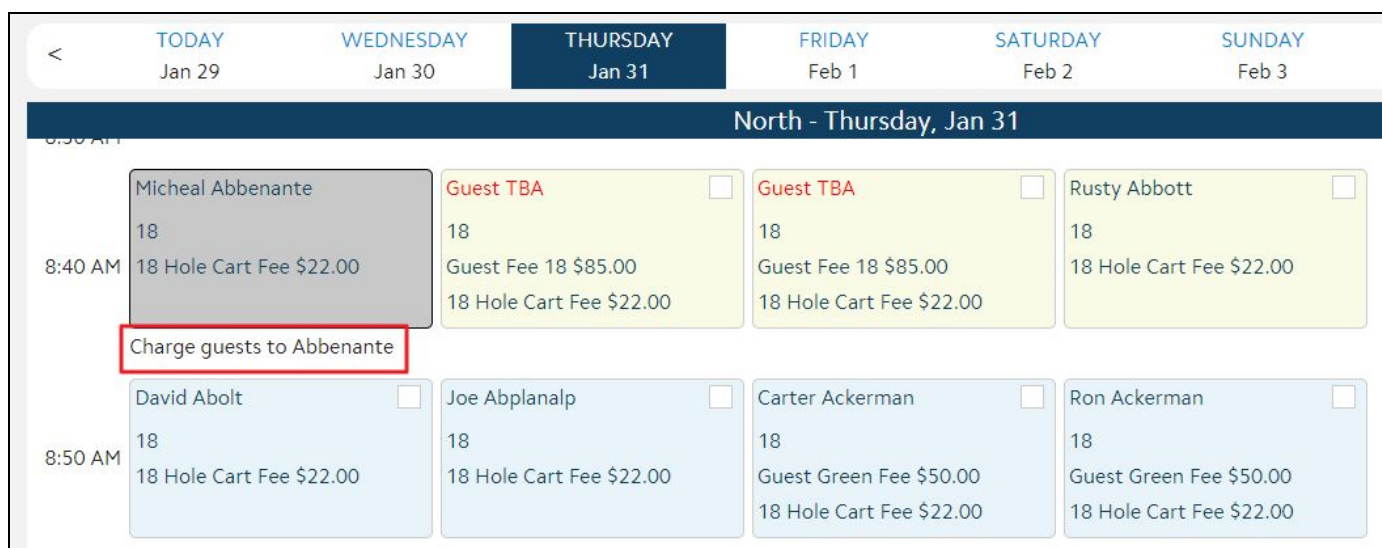## Guest Charges

When in Mobile POS and using the **Member Charge** functionality with a mixed booking of Members and Guests, the system will clarify who is paying for each guest, as seen below.

Admin Notes

When Admin Notes are added for a tee time, they will display beneath the booking, as seen here.

Classic POS

Tee Times are visible in the Classic POS under the **Tee Times** tab.

All Tee Times are listed here by Date and can be filtered by Course as well. Tee Times that have been fully paid for show in darker green and those that have been partially paid show in yellow. You can use the Filter dropdown to remove those groups that have fully paid by clicking **Filter** and choosing **Not Paid**.

To settle a Tee Time booking within Classic POS, select the Tee Time from the main tab; this will begin to create a ticket.

Create Ticket allows the User to select which Member is responsible for charges and for who. Once that is selected, the User can then settle the ticket within Classic POS.

Settlements remain the same for Classic POS. Member Charge and Create Ticket both function as normal and will automatically sync and show as Paid in the Mobile POS Tee Times tab.

CMA/Classic/Mobile POS

All systems work together synchronously. Mobile POS and Classic POS both reflect all charges upon Settlement.

If a reservation is paid for in Mobile POS, Classic POS will show that the next time the grid refreshes. If you pay for a reservation in Classic POS, Mobile POS will show that the next time the tee sheet refreshes.

For example, when a Member is checked-in and settled via Mobile POS, Classic POS will also reflect those changes highlighting the paid Member(s) in green and listing them under the paid column, shown here.

Further, when the Tee Time is clicked, Classic POS will provide information on where the ticket came from, who paid, and allow the User to view, re-open, or delete the ticket.

Please Note: *Classic POS is the main POS program; tickets created in either Mobile or Classic can be deleted or reopened in Classic POS. Whereas Mobile POS tickets can only be deleted or reopened **only** in Mobile POS.*
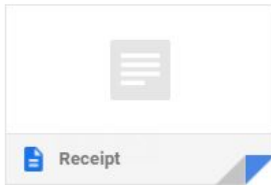
Email Confirmation

Members can receive a **confirmation email** upon check-in with an attached receipt if you would like.

From: <support@clubessential.com>
Date: Tue, Feb 5, 2019 at 11:02 AM
Subject: Tee Time Checked In
To: <sleli@clubessential.com>

Hello Micheal Abbenante, your tee time at 8:40 AM has been checked in. Your receipt is attached to this email. Thank you- The Grand Key Club Pro Shop

...

Receipt

```
-----------------------------------
           Vineyard Golf Club
-----------------------------------
Tkt #: 338          02/05/19 11:02 AM
Golf               Table: Quick Ticket
Covers: 0          Staff:Administrative
                                     U.
(#27730487) Micheal Abbenante
-----------------------------------
1 18 Hole Cart Fee              $22.00

                    Sub Total: $22.00
              Service Charge:   $4.40
         Additional Gratuity:   $0.00
                   Sales Tax:   $1.91

                       Total: $28.31

               Member Charge: $28.31
                  Change Due:  $0.00


_____
   (#27730487) Micheal Abbenante
Credit Book Balance: $0
Service charge remains property of
the Club, not the employee
```

The email template, snippets, and content can be edited within CMA. accessible under **System Settings, Web Site - Office Cloud, Edit Office Cloud Endpoint**, then **Tee Times tab**, as seen here.
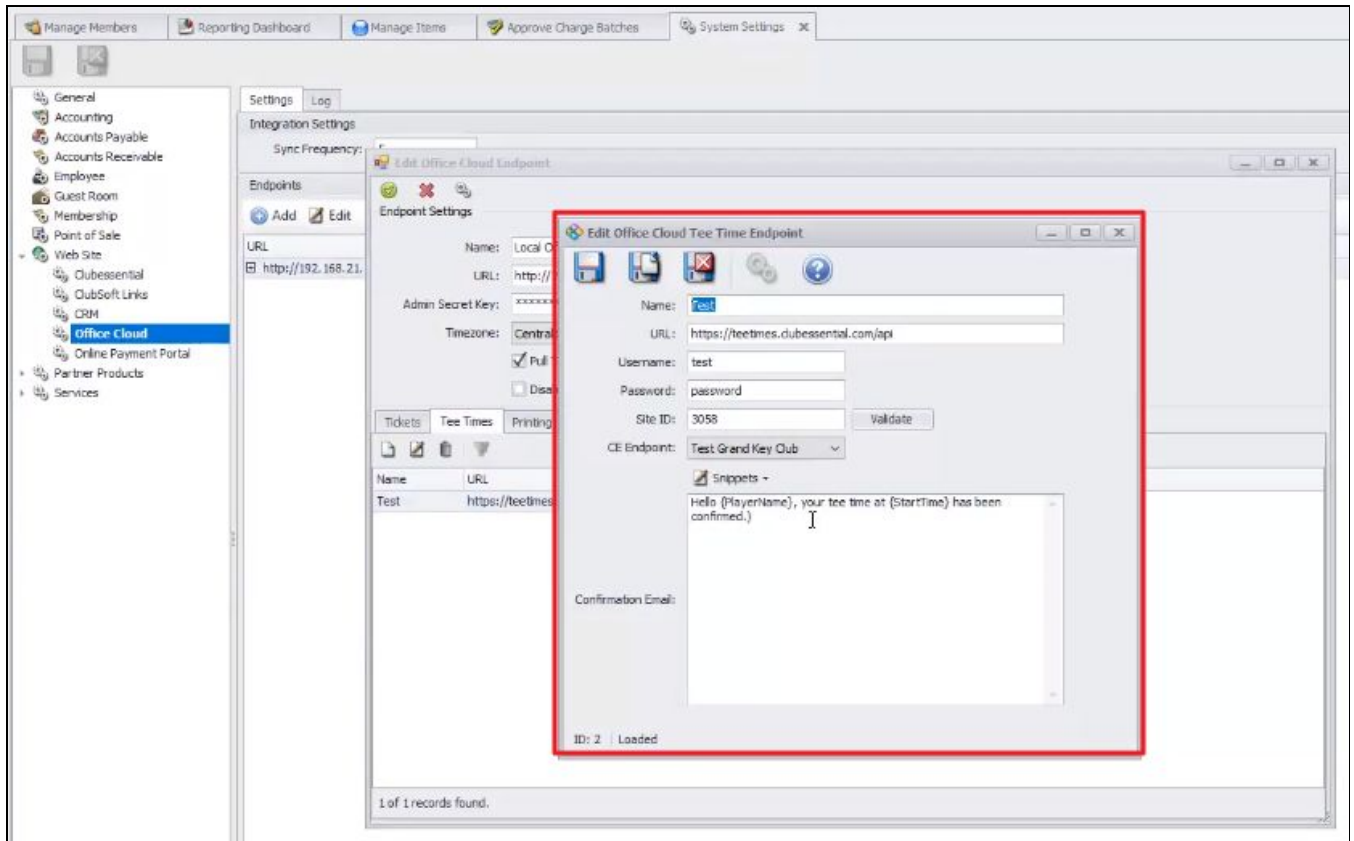
Common Questions and Concerns

Q: How often does the Mobile POS Tee Times page refresh? Are my changes automatic?

A: The Mobile POS Tee Times will refresh on its own every three minutes. You can manually refresh to see changes before that three minute mark by changing dates and then reverting back. We will also be adding a "Refresh" button.

Q: What if we have a Card present transaction instead of a Member Charge?

A: Currently Member Charge is active and we have compatibility with Square on iPads for credit card transactions.

Q: How can I switch the view between courses when using Mobile POS Tee Times?

A: Users can toggle between Courses by the Tee icon in the top right corner of the screen, shown below.
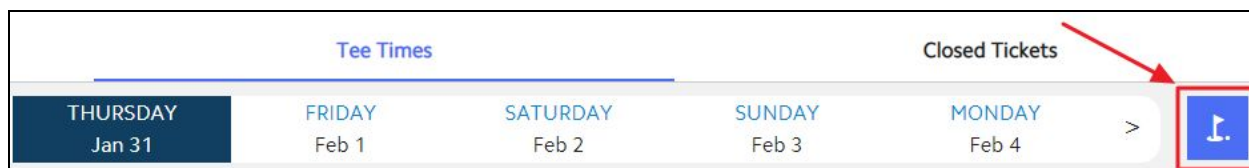
Best Practices

- In order to immediately refresh the Tee Times page on Mobile POS, the User can select the next day and then reselect the current day. This will pull in the most up to date data. The tee sheet will also automatically refresh every 3 minutes.