Office - 3.18.19 Release

User Guide - Table of Contents

Enhancements

General Ledger

Accounts

- **Added Control setting in addition to an Employee Role to restrict posting/unposting Journal Entry Batches that impact Control Accounts.**

  *Use Case***:** To enhance security around allowing journal entries to certain accounts (A/R, AP), etc., a Control setting option has been added to the account setup. When checked, only users with Post to Control Account are allowed to create and post/unpost journal batches to the account.
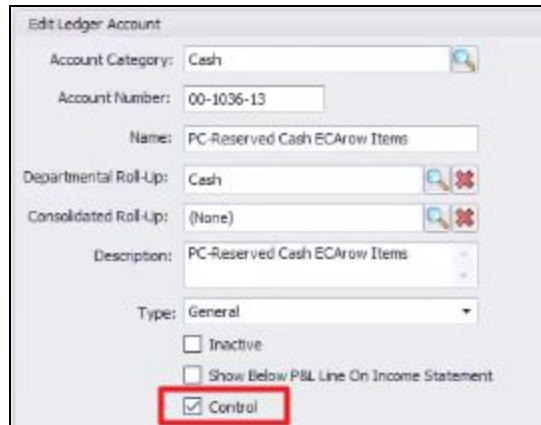
General Ledger Transactions

- **Quick toggle capability added to GL Transactions Grids**.

  Use Case: Users can now navigate through multiple periods in the GL Transactions Grid with the newly added quick toggle arrows, as shown below. This allows navigation through more than one period, if selected in the date picker. Arrows will disappear if only viewing one calendar month in the range.
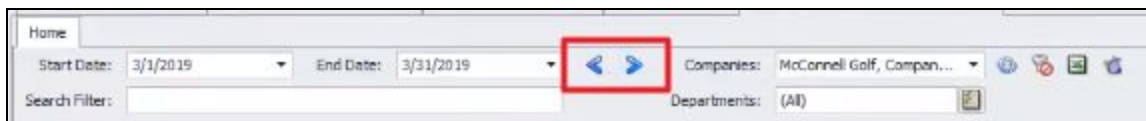
Membership

Installment Billings

- **Increased control on Installment Billings by no longer allowing Users to delete Installment Billings once the installment billings have begun.**

    Use Case: Previously, Users could enter a Member Profile and delete the Member's Installment Billing before it was complete. Now, the option to delete (highlighted below) is disabled once an Installment Billing has begun..
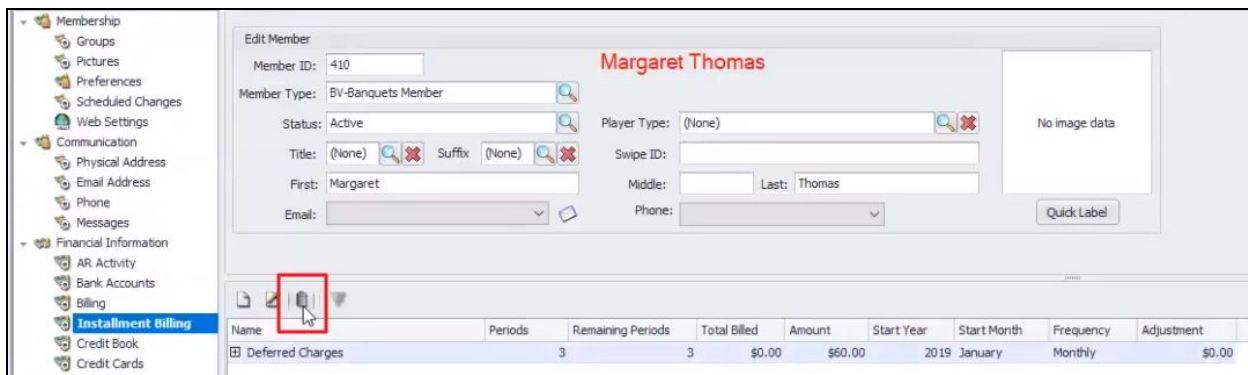
Manage Members Grid

- **Clarified functionality with the Autopay column in the Manage Members Grid.**

    Use Case: Previously, the checkmark for Autopay shown in the Member Grid was not clear as to whether the Member was enrolled in Autopay or not. Now, a clear and definitive checkmark indicates if the Member is enrolled in Autopay, as shown below.

Mobile POS

- **Additional Design work has been completed on Mobile POS.**

    Use Case: The Mobile POS User Design has had additional upgrades to make it more visually pleasing, touch and User friendly. See examples below of the Select a Device screen and Order Entry screen, new changes reflected on the left.
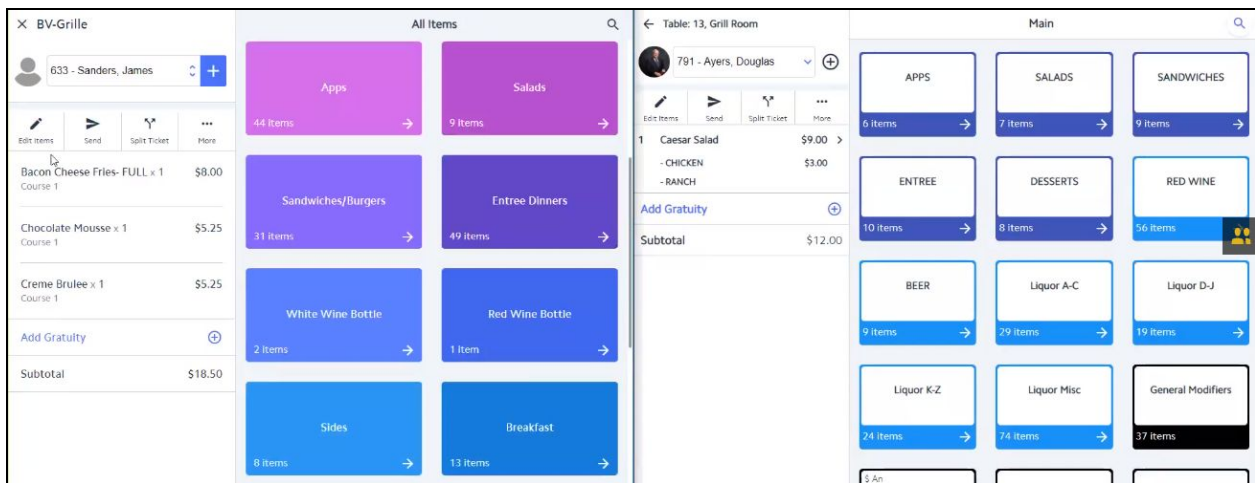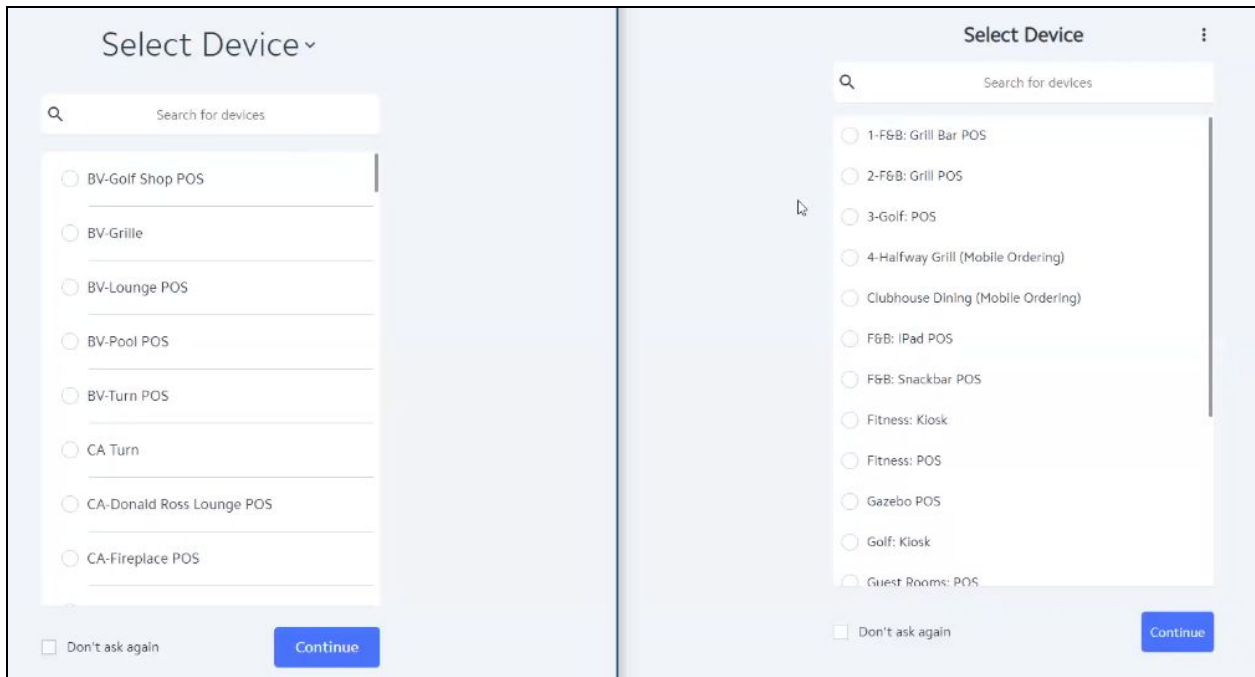
- **Screen Group color palette mapping for Mobile POS has been updated for enhanced tablet viewing.**

  <u>Use Case</u>: When creating a screen group in CMA, colors will be reflected exactly in Classic POS. Mobile POS redesign has opted for colors that stand out well when viewing on a tablet. See example below, Office Screen Group Designer on the right, and the tablet-ready colors that translates to on the left.

  <u>Please Note:</u> *Text color will **always** show as white or black on buttons. In addition, Item buttons will **always** be white.*
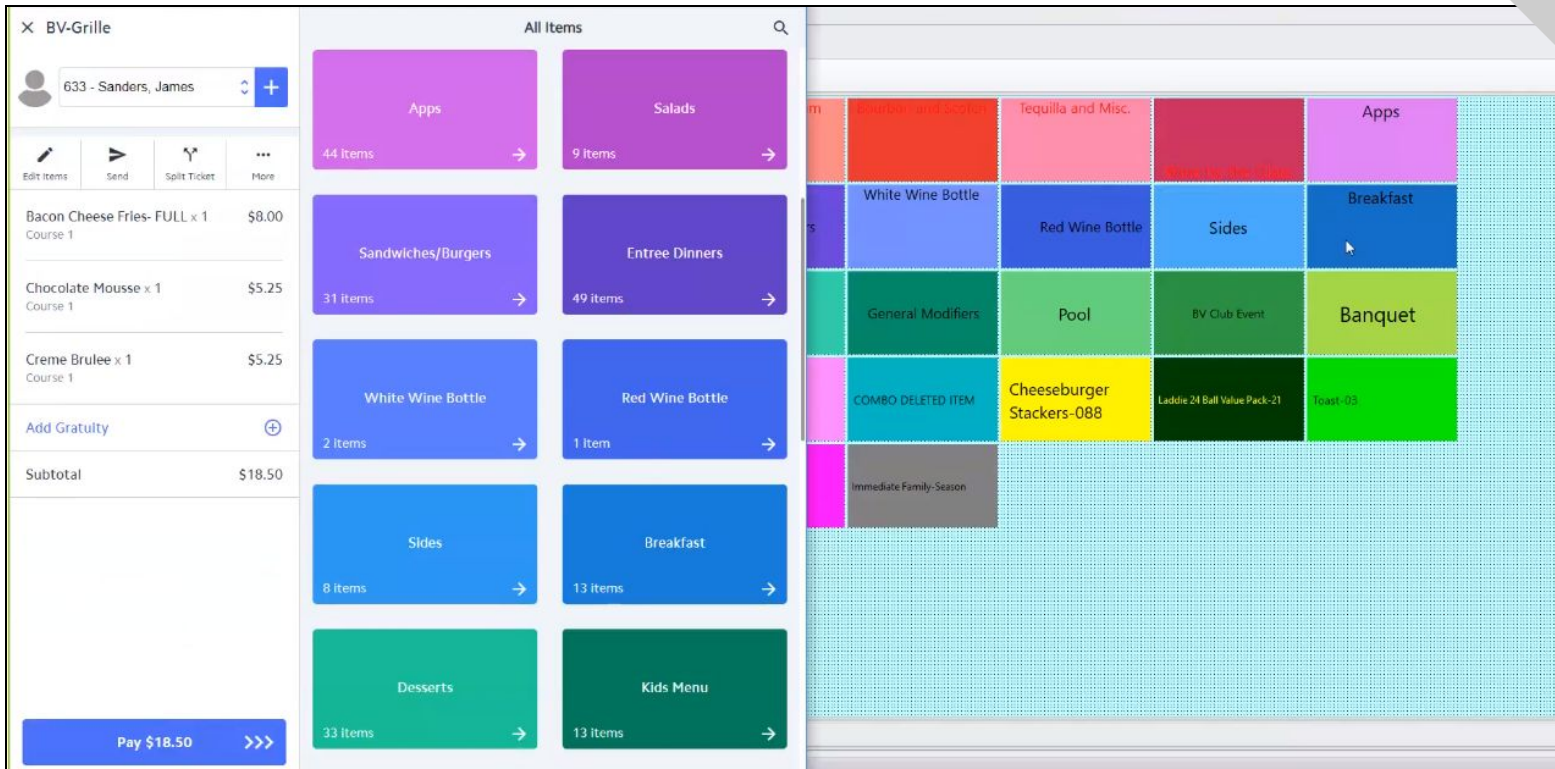
- **Multi-edit Item support has been added to Mobile POS**.

  Use Case: New Multi-edit Item support has been added to the Order Entry/Settlement screen by selecting Edit Items. This allows for multiple Items to be discounted, comped, deleted, etc. all at once. Previously, Items had to be individually selected and the action then performed for each Item. See Edit Items button and new checkboxes below.
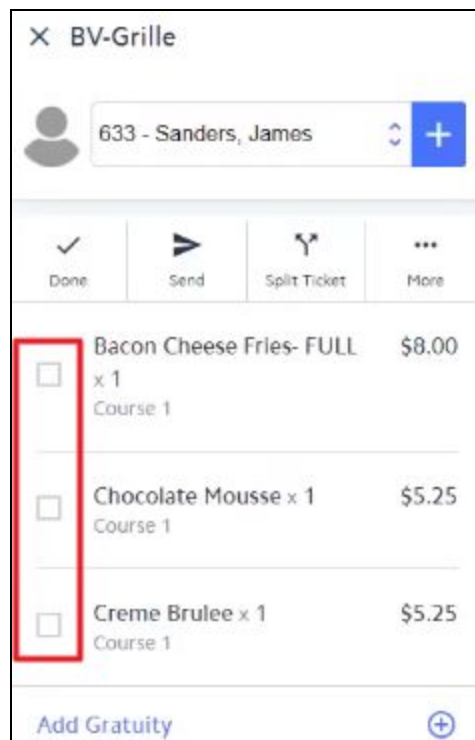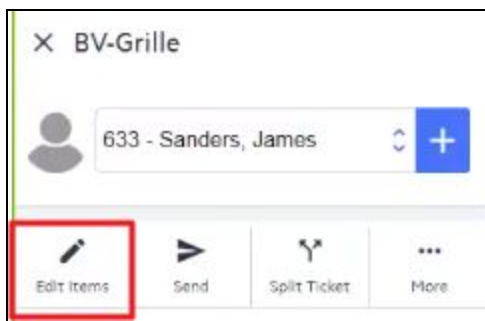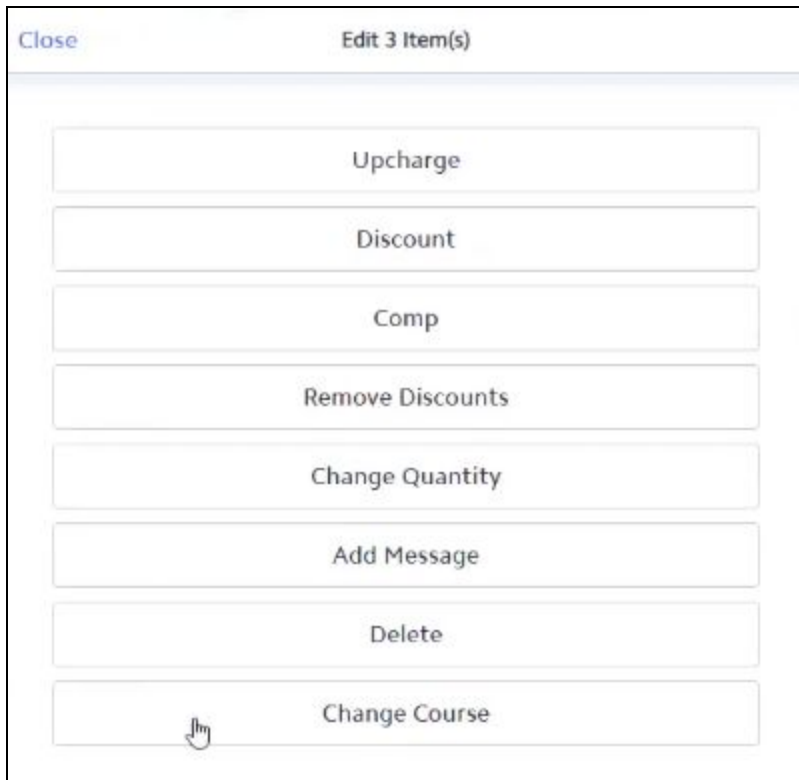
- **Mobile POS Edit Ticket feature now shows Item Course and Seat information for each item on the ticket.**

  Use Case: Previously, each item had to be selected to view the Item Course and Seat information. Now, new functionality shows this information directly under each Item on a ticket in the Order Entry screen. See example of Course labeling below.
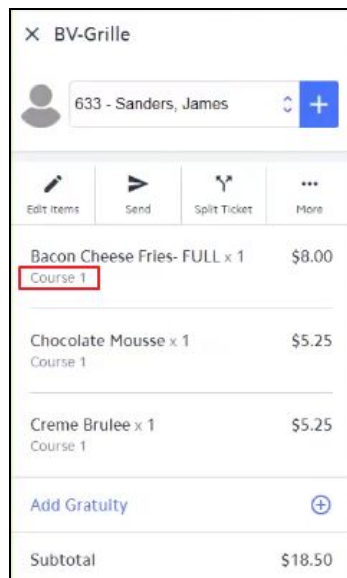
Membership Analytics Predictor - MAP (Beta Release)

Member Retention Summary Report

- **Modified Member Retention Score Summary Report percentage change search criteria to show results greater than, less than, or equal to a certain percentage.**
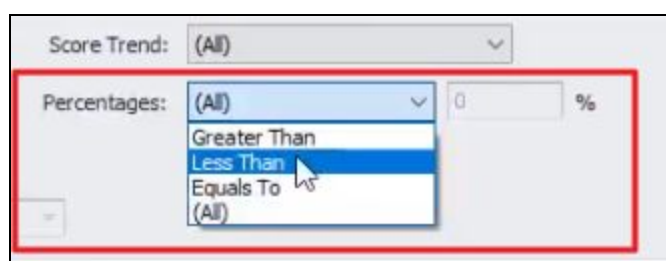
  Use Case: Previously, Users needed to enter a number to search for the percentage change. Now, Users can search for a change greater than, less than, or equal to a certain percentage change.

- *For more information on this program, please contact education@clubessential.com.*

Bug Fixes

- Fixed an issue with Opt In/Opt Out Groups between Office and Axis where Members who would Opt In or Out would then be overwritten in Office upon the next Member coming in or out of the Group. A new API call has been added to remedy the overwriting.

- Fixed an issue with orphaned Credit Card payments in Mobile POS via Square where the payment does not appear processed. Users can access the payment in Mobile POS within the ticket, select Pay, the Square payment should appear, then select done and the ticket will reconcile and close.

- Fixed an issue when clubs would automatically enroll credit cards/bank accounts while capturing funds in the Member Payments wizard and those credit cards/bank accounts would become un-openable/uneditable.

- Fixed an issue with Mobile POS tickets that contain a combo not successfully processing the items in the combo when creating the invoice.

- Fixed an issue with Mobile POS when users add a tip from within the Square app and the ticket not closing successfully.

- Fixed an issue with Mobile POS where a penny was being added to the total because of rounding issues between Mobile POS and Square.

- Fixed an issue with Mobile POS when searching the Open Tickets and Closed Tickets grids would error due to invalid member names.

- Fixed an issue with Mobile POS where the Continue button would not appear on the Sign In page on older iPads running iOS v10 or older.

- Fixed an issue in Mobile POS when doing a Split Ticket and tickets from other areas that share the same table layout would appear.

- Fixed a bug where, when adding a note to an inventory adjustment batch in CMA, the G/L impact would double.

- Fixed an issue when editing a dynamic member group in CMA where users could enter any number possible for the "Years of Membership" MAP criteria.

- Fixed an issue where the Items Purchased by Member report would show gratuities for filtered-out tickets based on item category.

- Fixed an issue when using the Payment Transfer wizard and the system would error because of bad data on the Check Number field.

- Fixed an issue where a blank minimum or the wrong minimum would appear in the member file because a member group had been deleted.