

# Calendar Utilization Webinar



# Ask a Question at Any Time!

Questions will be addressed throughout of the webinar.

**Please note:** This webinar is being recorded. The recording will be sent out after the webinar.



**Josh Morrison**



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# Agenda



- Creating Event Items in Back Office/CMA
- Accessing Your Calendar & Reviewing Its Various View Options
- Creating Single & Multi-Day Events
- Setting-up Online Registration
- Assigning Fees for Events
- Using Event Notifications
- Member Payment Options for Events
- Mobile POS Check-in for Events
- Managing Interest Areas and Plugins
- Managing Events through Event Manager
- Questions & Answers

# The Importance of Your Club Calendar

Your **Club Calendar** is an extremely effective tool for advertising club events and keeping your members engaged and involved in Club activities. When members can quickly see what's going on at the Club, ascertain the details, and conveniently register themselves and their guests for an event, they're more likely to consider participating in events they may have otherwise glossed over in the past. Members love being autonomous and in control of their commitments; having your **Club Calendar** and **Event Registration** at their fingertips satisfies a big market demand.



CALENDAR						
SUN	MON	TUE	WED	THU	FRI	SAT
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

*Join us for our Monthly Wine Tasting Event  
First Friday of Every Month  
In the Grill Room  
From 7:00 - 9:00 PM*



*Appetizers Only - \$20 a person  
Apps + 1 Flight of Wine - \$40 a person  
Apps + 3 Flights of Wine - \$60 a person*

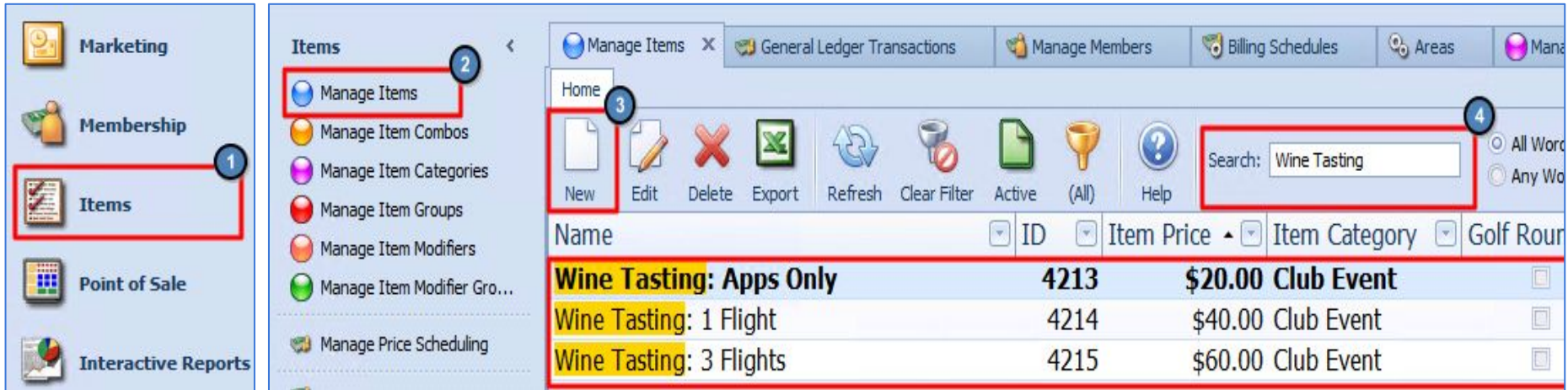
## Plan Your Event & Define Your Items

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- Determine the unique price points for your event
- Define each unique price point as an Item in CMA
- Creating your Items in CMA will allow you to integrate your Event throughout your entire Product Suite

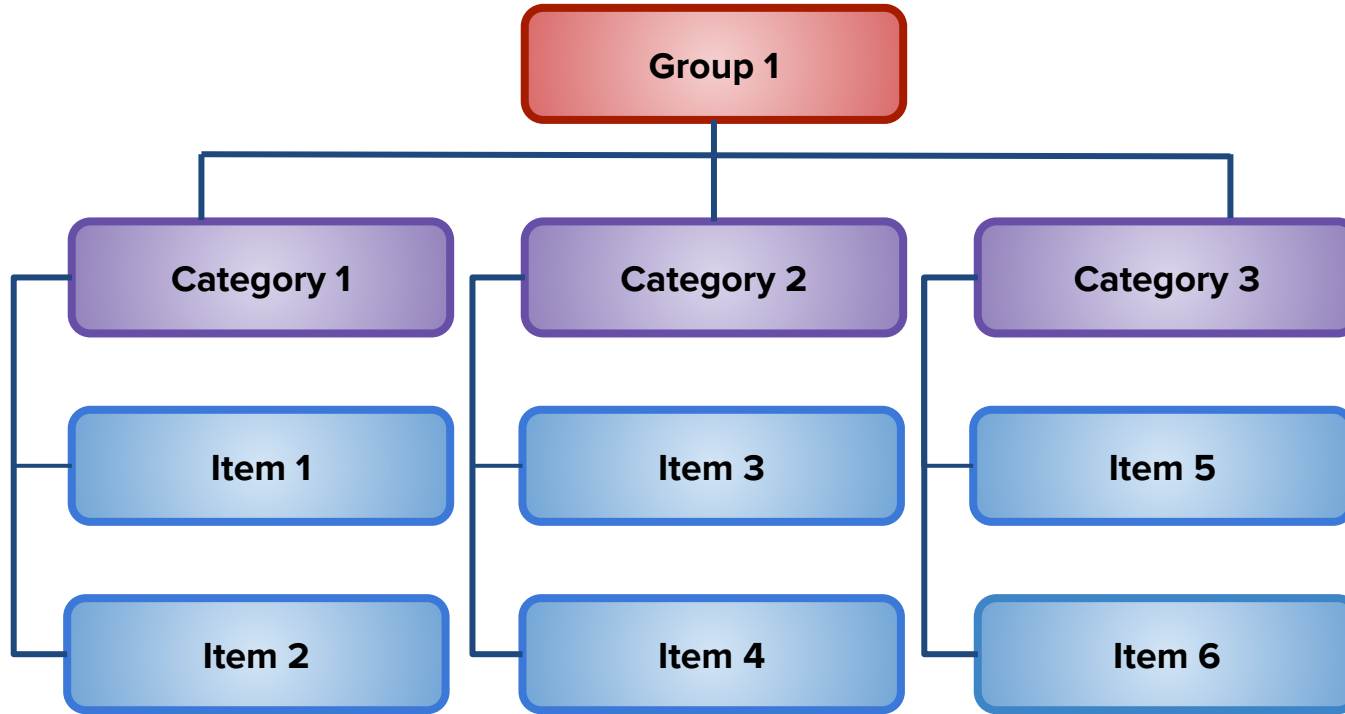
## Create Your Items in CMA

- Click on the **Items** Module in CMA
- Select **Manage Items** within the Module
- Use the **New** icon to create new items; Use **Search** to search for existing items



The screenshot displays the CMA software interface. On the left, the 'Items' module is highlighted with a red box and a callout '1'. Within the 'Items' module, the 'Manage Items' option is highlighted with a red box and a callout '2'. The main window shows the 'Manage Items' screen with a toolbar containing icons for 'New', 'Edit', 'Delete', 'Export', 'Refresh', 'Clear Filter', 'Active', and 'Help'. The 'New' icon is highlighted with a red box and a callout '3'. The search bar is highlighted with a red box and a callout '4', containing the text 'Wine Tasting'. Below the toolbar, a table lists items with columns for Name, ID, Item Price, Item Category, and Golf Round.

Name	ID	Item Price	Item Category	Golf Round
<b>Wine Tasting: Apps Only</b>	4213	\$20.00	Club Event	
Wine Tasting: 1 Flight	4214	\$40.00	Club Event	
Wine Tasting: 3 Flights	4215	\$60.00	Club Event	







## Review Your Items Within the Item Category

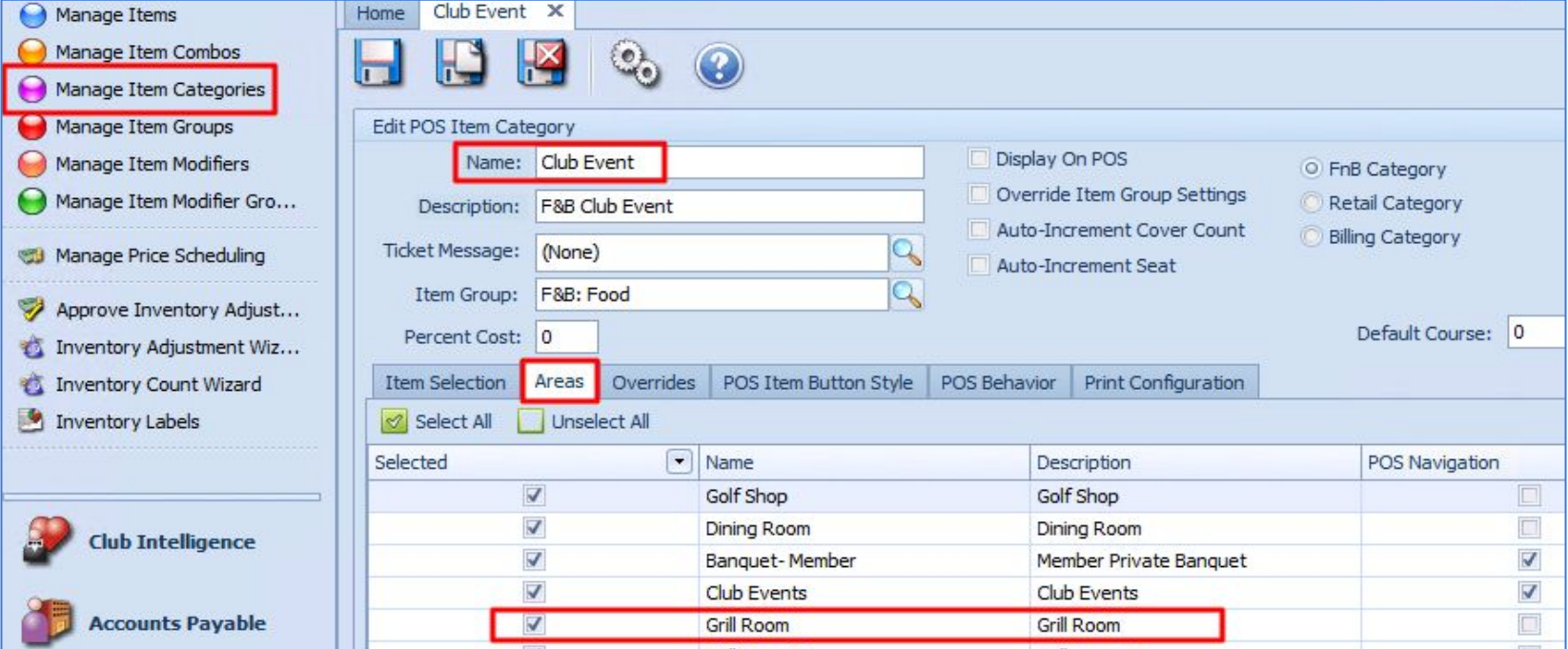
- Select **Manage Categories** within the Items Module
- Find your specific **Item Category** within the list of Categories and double click on it to open the Category details.
- Validate that your items appear within the **Item Selection** tab.

The screenshot displays the software interface for managing items. On the left, the 'Items' menu is expanded, with 'Manage Item Categories' highlighted in red. The main window shows the 'Edit POS Item Category' form for 'Club Event'. The 'Item Selection' tab is active, showing a table of items. The 'Wine Tasting: Apps Only' item is highlighted in red in the table.

Name	Type	Hide In ...	Description
Tennis Calcutta Dinner	Item	<input type="checkbox"/>	Tennis C...
Tennis Calcutta	Item	<input type="checkbox"/>	Tennis C...
Tennis Holiday Luncheon	Item	<input type="checkbox"/>	Tennis H...
Test Club Event Adult	Item	<input type="checkbox"/>	Test Clu...
Thanksgiving - Adult	Item	<input type="checkbox"/>	Thanksgi...
Thanksgiving - Child	Item	<input type="checkbox"/>	Thanksgi...
The Cancellation Fee	Item	<input checked="" type="checkbox"/>	The Can...
Tom Montague Domino Dinner	Item	<input type="checkbox"/>	Tom Mon...
Tree Lighting - Adult	Item	<input type="checkbox"/>	Tree Ligh...
Tree Lighting - Child	Item	<input type="checkbox"/>	Tree Ligh...
Valentine's Day	Item	<input type="checkbox"/>	Valentine...
Vientine's	Item	<input type="checkbox"/>	Vientine's
Western Party	Item	<input type="checkbox"/>	Western ...
Wimbledon Buffet	Item	<input type="checkbox"/>	Wimble...
Wine Dinner	Item	<input type="checkbox"/>	Wine Din...
Wine Tasting: 1 Flight	Item	<input type="checkbox"/>	Wine Tas...
Wine Tasting: 3 Flights	Item	<input type="checkbox"/>	Wine Tas...
Wine Tasting: Apps Only	Item	<input type="checkbox"/>	Wine Tas...
Wooha	Item	<input type="checkbox"/>	Wooha
Wooha - Child	Item	<input type="checkbox"/>	Wooha - ...
Xmas Eve - Child	Item	<input type="checkbox"/>	Xmas Ev...
Xmas Eve - Adult	Item	<input type="checkbox"/>	Xmas Ev...

## Review Your Event Area Within the Item Category

- Navigate to the **Areas** tab within your **Item Category** details and ensure that the Area that will be used to host your Event is selected.



The screenshot shows the 'Edit POS Item Category' window for 'Club Event'. The left sidebar has 'Manage Item Categories' highlighted. The main area shows the 'Areas' tab selected, with a table listing available areas. The 'Grill Room' row is highlighted with a red box.

Selected	Name	Description	POS Navigation
<input checked="" type="checkbox"/>	Golf Shop	Golf Shop	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Dining Room	Dining Room	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Banquet- Member	Member Private Banquet	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Club Events	Club Events	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Grill Room	Grill Room	<input type="checkbox"/>



## Sync Your Items from CMA to Your Website

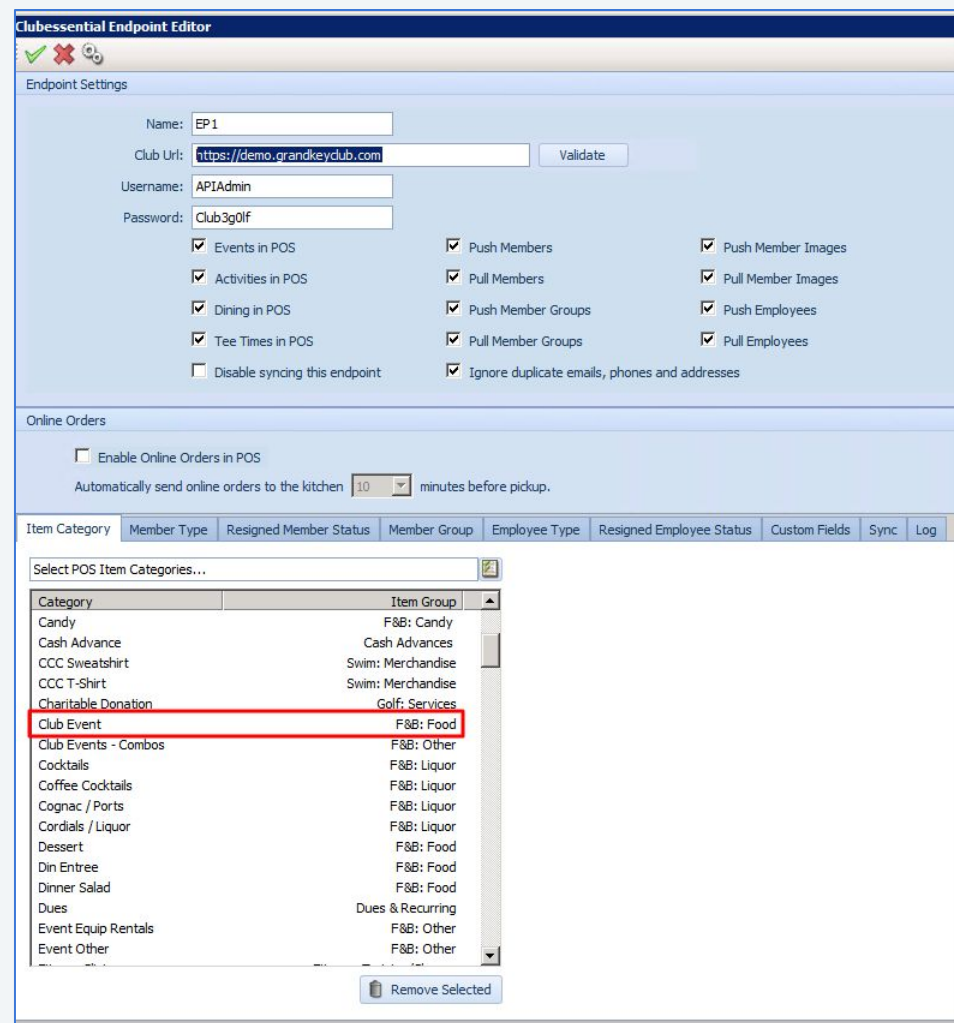
- Navigate to **System**, then **System Settings**
- Select **Web Site** from the System Settings dropdown
- Select your **Club Web Site**
- Double click on the **URL** of your Club's Site to open the Endpoint Editor

A screenshot of the 'Web Site' settings page. The left sidebar shows a list of categories, with 'Web Site' selected and circled '3'. Under 'Web Site', 'Clubessential' is selected and circled '4'. The main content area has tabs for 'Settings' and 'Log'. Under 'Integration Settings', there is a 'Sync Frequency' field with the value '3' and a checkbox for 'Hide Web Visibility Option'. Under 'Endpoints', there is a table with columns 'Name' and 'ClubUrl'. The table contains one row: 'EP1' with the URL 'https://demo.grandkeyclub.com', which is circled '5'.

Name	ClubUrl
EP1	https://demo.grandkeyclub.com

## Validate Your Endpoint Settings

- Ensure that the **Item Category** for your Event is included in the Item Categories set to sync to your Website.
- Here you can see that our **Club Events Item Category** is already included in the Categories syncing to our Grand Key Club Demo Site.

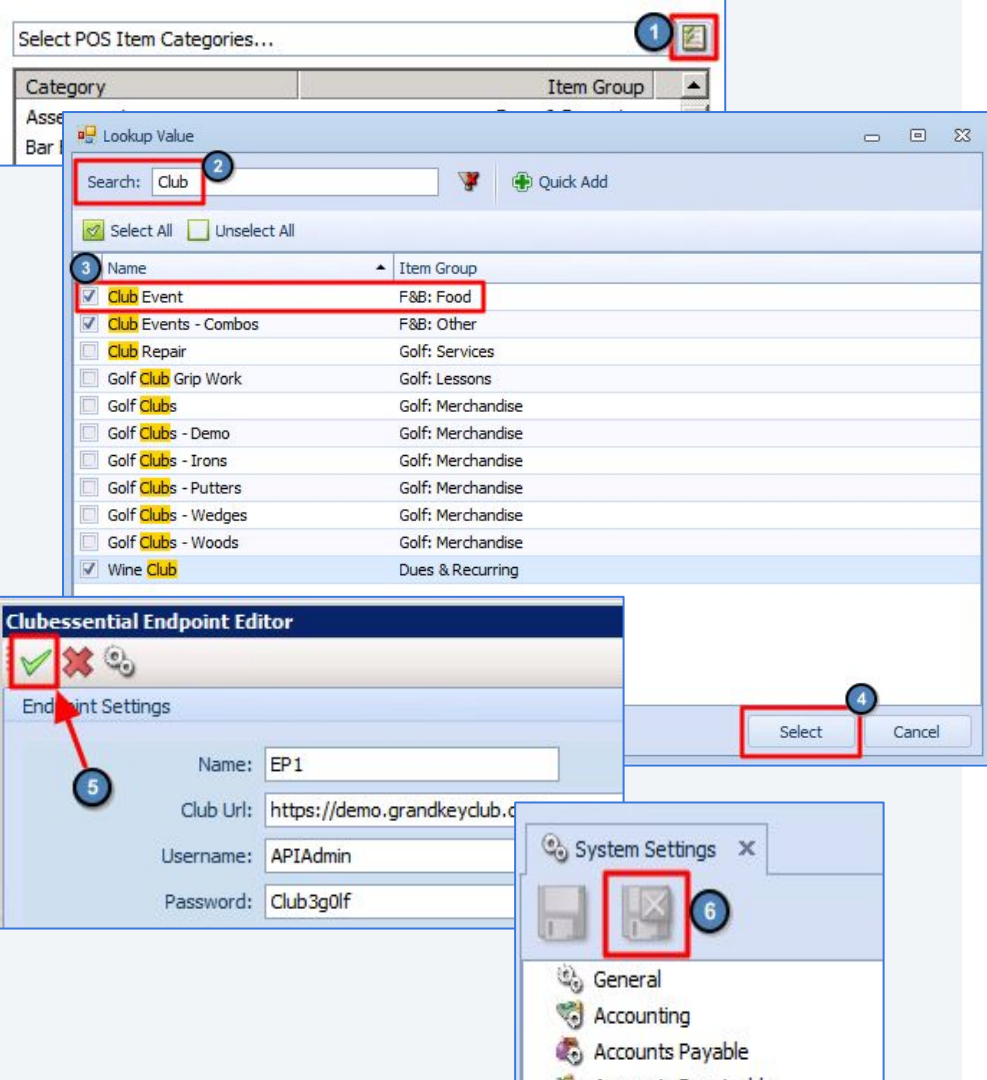


The screenshot displays the 'Clubessential Endpoint Editor' interface. The 'Endpoint Settings' section includes fields for Name (EP1), Club Url (https://demo.grandkeyclub.com), Username (APIAdmin), and Password (Club3g0lf). A 'Validate' button is present. Below these are several checkboxes for syncing data, all of which are checked: Events in POS, Activities in POS, Dining in POS, Tee Times in POS, Push Members, Pull Members, Push Member Groups, Pull Member Groups, Push Member Images, Pull Member Images, Push Employees, Pull Employees, and Ignore duplicate emails, phones and addresses. There is also an unchecked checkbox for 'Disable syncing this endpoint'.

The 'Online Orders' section has an unchecked checkbox for 'Enable Online Orders in POS' and a dropdown menu set to '10' minutes before pickup.

At the bottom, there is a navigation bar with tabs: Item Category, Member Type, Resigned Member Status, Member Group, Employee Type, Resigned Employee Status, Custom Fields, Sync, and Log. Below this is a 'Select POS Item Categories...' dialog box with a table of categories and item groups. The 'Club Event' row is highlighted with a red box.

Category	Item Group
Candy	F&B: Candy
Cash Advance	Cash Advances
CCC Sweatshirt	Swim: Merchandise
CCC T-Shirt	Swim: Merchandise
Charitable Donation	Golf: Services
<b>Club Event</b>	<b>F&amp;B: Food</b>
Club Events - Combos	F&B: Other
Cocktails	F&B: Liquor
Coffee Cocktails	F&B: Liquor
Cognac / Ports	F&B: Liquor
Cordials / Liquor	F&B: Liquor
Dessert	F&B: Food
Din Entree	F&B: Food
Dinner Salad	F&B: Food
Dues	Dues & Recurring
Event Equip Rentals	F&B: Other
Event Other	F&B: Other

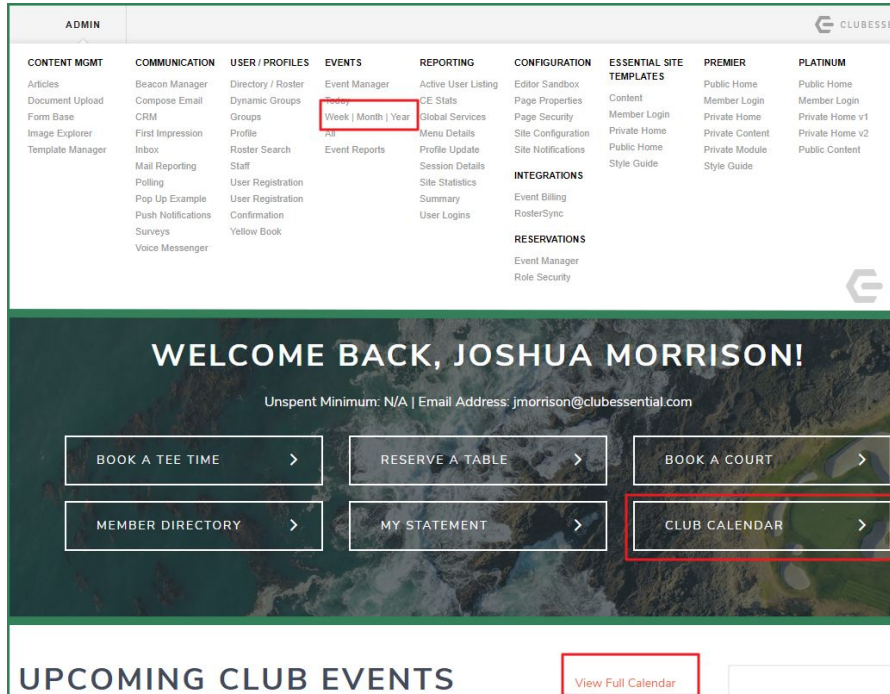


## ➤ Add Categories to be Synced

- If your **Item Category** is not already syncing, add it by clicking the **List Icon** next to Select POS Item Categories.
- **Search** for your Item Category
- Click the **Checkbox** next to your Item Category
- Click **Select** to apply your changes
- Save your changes by clicking **Accept Changes** (the green checkmark) within the Endpoint Editor
- Save and Close **System Settings**

# Viewing & Accessing Club Calendar

Accessible from a variety of locations. Under Events in the Admin Toolbar, within the site navigation, and even links on the home page.



The image shows a screenshot of the Clubessential system interface. At the top, there is an 'ADMIN' toolbar with a grid of menu items. The 'EVENTS' column is highlighted with a red box, and the 'Week | Month | Year' option is selected. Below the toolbar, a user welcome banner for 'JOSHUA MORRISON!' is displayed, including a 'WELCOME BACK, JOSHUA MORRISON!' message and a 'View Full Calendar' link. Below the banner, a row of navigation buttons is shown, with the 'CLUB CALENDAR' button highlighted by a red box. At the bottom, the 'UPCOMING CLUB EVENTS' section is visible, also featuring a 'View Full Calendar' link.

ADMIN	CONTENT MGMT	COMMUNICATION	USER / PROFILES	EVENTS	REPORTING	CONFIGURATION	ESSENTIAL SITE TEMPLATES	PREMIER	PLATINUM
	Articles Document Upload Form Base Image Explorer Template Manager	Beacon Manager Compose Email CRM First Impression Inbox Mail Reporting Polling Pop Up Example Push Notifications Surveys Voice Messenger	Directory / Roster Dynamic Groups Groups Profile Roster Search Staff User Registration User Registration Confirmation Yellow Book	Event Manager Today Week   Month   Year Menu Event Reports	Active User Listing CE Stats Global Services Menu Details Profile Update Session Details Site Statistics Summary User Logins	Editor Sandbox Page Properties Page Security Site Configuration Site Notifications  INTEGRATIONS Event Billing RosterSync  RESERVATIONS Event Manager Role Security	Content Member Login Private Home Public Home Style Guide	Public Home Member Login Private Home Private Content Private Module Style Guide	Public Home Member Login Private Home v1 Private Home v2 Public Content

WELCOME BACK, JOSHUA MORRISON!  
Unspent Minimum: N/A | Email Address: jmorrison@clubessential.com

BOOK A TEE TIME > RESERVE A TABLE > BOOK A COURT >  
MEMBER DIRECTORY > MY STATEMENT > CLUB CALENDAR >

UPCOMING CLUB EVENTS [View Full Calendar](#)



## Calendar Options

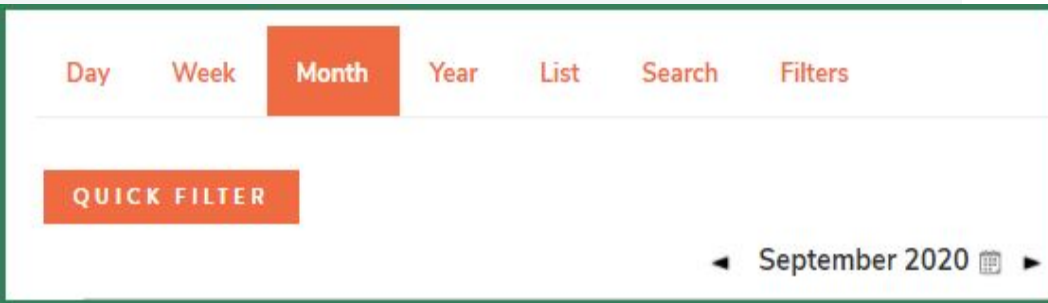
- **Help** -
- **Add Single Day Event** - Single and recurring events will be created here.
- **Add Multi Day Event** - Create an event that spans multiple days such as a Golf Tournament. One registration for the entire event.
- **Add Personal Event** - This allows members to create a reminder that only they will see on the website calendar
- **Export Calendar** - Export events and sync with one of your personal calendars.
- **Printable Version** - Print entire calendar. Opens new tab with print options.





## Changing views and filters

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- **Calendar Views** - List, Day, Month, Year. Ability to view Calendar in different formats
- **Search Tab** - Search for specific events using the event title and date range.
- **Filters** - Create your own filter for viewing specific groups of events based on interest area.
- **Quick Filter** - Available when viewing the main club calendar. Use to narrow down which events are shown





## Additional Calendar Notes of Interest

- **No icon** - Registration is not available for an event.
- **Red Icon (not filled)** - Registration is not yet open.
- **Red Icon (filled)** - Event is closed. Either registration has passed or the event has passed.
- **Green Icon (not filled)** - Available to register.
- **Green Icon (filled)** - Event that you (from the members point of view) have registered for.
- **Yellow Icon** - currently on the waitlist.

4	5	6	7	8	9	10
Children's Golf Clinic	Aqua Bones and Joints Test Yoga Yin Stretch Zumba	Core Strength Tennis Clinic - Intermediate Zumba Lite Tacos & Tequila Yoga Pilates	Aqua Tennis Clinic - Advanced Zumba Lite Test Yoga Family Style Pasta Night Pilates Tai Chi	Core Strength Body Sculpt Pilates	Lobster Bake Lobster Bake Aqua Bones and Joints Test Zumba	Core Strength Tennis Clinic - Beginner/Intermediate PowerRyde Class Zumba Body Sculpt
<p>● Not Yet Open ● Available ● Reserved ● Wait Listed ● Sold Out ● Closed</p>						



## Creating Single Day Event Details

- **Event Title** - Name of the event.
- **Event Color** - Color that your event will appear as on the calendar.
- **Event Summary** - Short description of the event
- **Event Area** - Area where the event will take place. Used with Billing.
- **Visibility Dropdown** - Hide your event until ready.
- **Clickable Event** - keep checked if the event is one that a member may register for.
- **Allows Members to Email Event** - Members can email Admins on event
- **Title Position** - Where title is on event flyer

**Add Event**

Step 1 - Event Detail

Event Title

Event Color

Event Summary

Event Area

Event Status

Title Position

Clickable Event  Allow Public View?

Allow Members to Email Event?

Categories  
Please enter at least one

- Select All
- Calendar
- Fitness
- Golf
- Golf Leagues
- Jr Camp

External Event Flyer

Event Thumbnail

All day Event  Has End Time?

Start Time

September, 2020

	S	M	T	W	T	F	S
36	30	31	1	2	3	4	5
37	6	7	8	9	10	11	12
38	13	14	15	16	17	18	19
39	20	21	22	23	24	25	26
40	27	28	29	30	1	2	3
41	4	5	6	7	8	9	10

Save and Continue | Save and Close



## Additional Event Details

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Categories  
Please enter at least one

- Select All
- Calendar
- Fitness
- Golf
- Golf Leagues
- Jr Camp
- ...

External Event Flyer

Event Thumbnail

**Categories** - The interest areas that your event will fit under. Can be a single interest area or multiple.

**External Event Flyer** - Only used if you want members redirected to a page outside of the website.

**Event Thumbnail** - Controls which picture will be displayed in a calendar plugin. (Such as homepage)



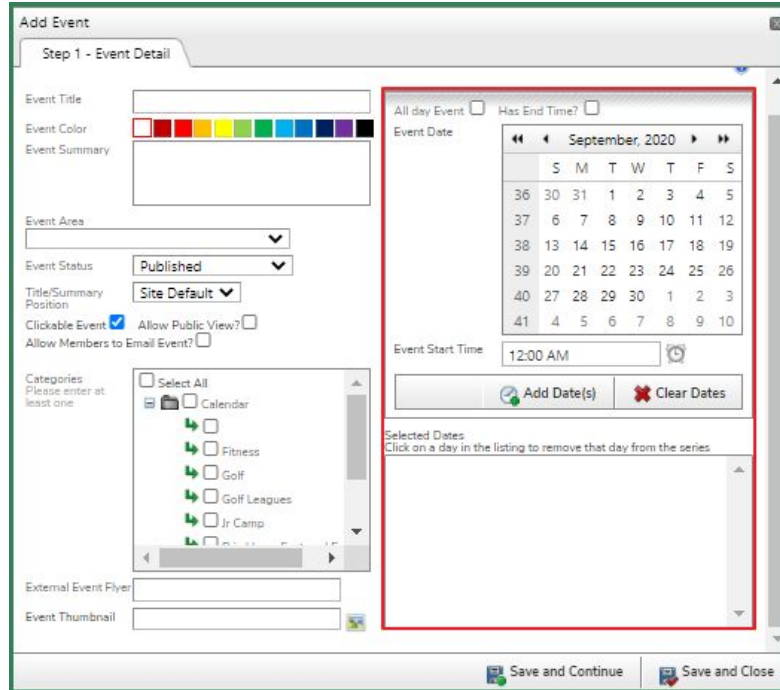
## Selecting Date and Time

The screenshot shows an event creation interface. At the top, there are two checkboxes: "All day Event" (marked with a blue circle 1) and "Has End Time?" (marked with a blue circle 2). Below these is a "Start Time" input field containing "12:00 AM" and a clock icon (marked with a blue circle 3). Below the form is a calendar for "September, 2020" with the date "22" selected (marked with a blue circle 4).

	S	M	T	W	T	F	S
36	30	31	1	2	3	4	5
37	6	7	8	9	10	11	12
38	13	14	15	16	17	18	19
39	20	21	22	23	24	25	26
40	27	28	29	30	1	2	3
41	4	5	6	7	8	9	10

1. **All day Event** - Removes end time since the event will be “all day”.
2. **End Time** - Select when the event will end.
3. **Clock Icon** - Select the start and end times or simply type in the box manually.
4. **Calendar** - Select a date for your event. In the event of a recurring event, simply select the first date.

When creating, you must select multiple days. Remember, there is only **ONE** registration for the entire event.



**Add Event**

Step 1 - Event Detail

Event Title

Event Color

Event Summary

Event Area

Event Status

Title/Summary Position

Clickable Event  Allow Public View?

Allow Members to Email Event?

Categories: Please enter at least one

- Select All
- Calendar
- Fitness
- Golf
- Golf Leagues
- Jr Camp

External Event Flyer

Event Thumbnail

All day Event  Has End Time?

Event Date

September, 2020						
S	M	T	W	T	F	S
36	30	31	1	2	3	4
37	6	7	8	9	10	11
38	13	14	15	16	17	18
39	20	21	22	23	24	25
40	27	28	29	30	1	2
41	4	5	6	7	8	9

Event Start Time

Selected Dates

Click on a day in the listing to remove that day from the series



## Additional Event Details After Saving

All day Event  Has End Time?

Start Time

End Time

Update Event Dates for this linked group of events

This event is part of a linked group of single day events. Would you like to edit all of the events that are part of this linked group, or just this single event?

Edit This Event Only

Edit This Event Only and Unlink it from Other Events

Edit All Event Dates

October, 2020							
	S	M	T	W	T	F	S
40	27	28	29	30	1	2	3
41	4	5	6	7	8	9	10
42	11	12	13	14	15	16	17
43	18	19	20	21	22	23	24
44	25	26	27	28	29	30	31
45	1	2	3	4	5	6	7

10/2/2020

11/6/2020

12/4/2020

2/5/2021

3/5/2021

4/2/2021

5/7/2021

**Event Times**

▶ 10/2/2020 7:00 PM-9:00 PM - Monthly Wine Tasting (30/100 Booked) X  
See More Dates and Time

- **Clone the Single Day Events** - recurring event such as a fitness class, or golf lessons.
- **Radio Buttons** - determine whether an edit you are making will only affect:
  - specific event
  - all events
  - specific event and unlink it



## Enabling Registration & Registration Options

- **Allow Online Registration** - causes the rest of the options to appear
- **Flyer Location Dropdown** - Above, below, or both
- **Max Number of People** - For the whole event
- **Max Party Size**
- **Days and Hours** - Set the time when reservations can be made and when those reservations can be cancelled.
- **Allow Registration After Event Starts?** - for both members and admins
- **Custom Confirmation Page** - Custom page upon registering

**Event Times**

Allow Online Registration

▶ 10/2/2020 9:30 PM-11:30 PM - Wine Tasting

**Registration Setup**

Registration Position

Max Number of People

Max Party Size

Reservations Begin  days  hours prior to event

Reservations End  days  hours prior to event

Cancellation Cutoff  days  hours prior to event

Allow Registration After Event Starts?

Allow Party Size Change After Cutoff?

Custom Confirmation Page



## Registration Details & Additional Options

**Email Notification** - Email(s) that submissions will be sent to

**Form Integration** - After registering, members are taken to one of your Formbase forms.

**Custom Questions - Optional** - Allows for up to 5 custom questions that may be used for specific needs for an event.

The image shows a screenshot of a web interface for event registration setup. It is divided into two main sections: 'Registration Setup' and 'Email Notification / Custom Questions'.

**Registration Setup**

- Registration Position: Site Default (dropdown)
- Max Number of People: 0 (input with up/down arrows)
- Max Party Size: 0 (input with up/down arrows)
- Reservations Begin: 0 days 0 hours prior to event
- Reservations End: 0 days 0 hours prior to event
- Cancellation Cutoff: 0 days 0 hours prior to event
- Allow Registration After Event Starts?
- Allow Party Size Change After Cutoff?
- Custom Confirmation Page Edit

**Email Notification**

- Email Address: [input field] ⚠

**Form Integration**

**Custom Questions – Optional**

- Question 1: [input field]
- Question 1 Required?
- Question 2: [input field]
- Question 2 Required?



Event Options	
Enable Wait List	<input type="checkbox"/>
Show Registered Member List to Members	<input type="checkbox"/>
Allow Proxy	<input type="checkbox"/>
Default to Proxy	<input type="checkbox"/>
Allow Spouse	<input checked="" type="checkbox"/>
Allow Children	<input checked="" type="checkbox"/>
Allow Guests	<input checked="" type="checkbox"/>
Allow TBA	<input checked="" type="checkbox"/>



## Who Can Register?

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- **Enable Wait List** - Sign up for the event even after it is full.
- **Allow Proxy**
- **Default to Proxy** - Members can register other members for the event and remove themselves from the reservation.
- **Allow Spouse**
- **Allow Children** - Must be clicked in order for members with those relationship designations to be registered
- **Allow Guests** - Members can register non-members to events.
- **Allow TBA** - Sign up for an event with placeholder spots for their party.

# Enabling Billing and Adding Fee Types

**1** Event

Event Detail | Registration | **Billing** | Notifications

**2** Enable Billing

**Event Times**

- ▶ 12/4/2020 7:00 PM-9:00 PM - Monthly Wine Tasting
- 10/2/2020 7:00 PM-9:00 PM - Monthly Wine Tasting
- 11/6/2020 7:00 PM-9:00 PM - Monthly Wine Tasting
- 2/5/2021 7:00 PM-9:00 PM - Monthly Wine Tasting
- 3/5/2021 7:00 PM-9:00 PM - Monthly Wine Tasting
- 4/2/2021 7:00 PM-9:00 PM - Monthly Wine Tasting
- 5/7/2021 7:00 PM-9:00 PM - Monthly Wine Tasting
- Hide Additional Dates and Times

**8** Load From Template

Event Detail | Registration | **Billing** | Notifications

Template: No Template

**Existing Fee Types**

Name	Value	Inventory
X Wine Tasting: 1 Flight	\$40.00	-
X Wine Tasting: Apps Only	\$20.00	-

**Fee Assignment**

Primary	No Fee Assigned	<input type="checkbox"/>
Spouse	No Fee Assigned	<input type="checkbox"/>
Child	No Fee Assigned	<input type="checkbox"/>
Adult Guest	No Fee Assigned	<input type="checkbox"/>
Child Guest	No Fee Assigned	<input type="checkbox"/>
TBA	No Fee Assigned	<input type="checkbox"/>

Check the box at right to allow members to select fee type when making a reservation

**Event Times**

Enable Billing

▶ 12/4/2020 7:00 PM-9:00 PM - Monthly Wine Tasting

See More Dates and Time

**Add New Fee Type**

Group: F&B: Food

Category: Club Event

Item: Wine Tasting: 1 Flight

Inventory: 0

Value: \$40.00

**9** F&B: Food

**10** Club Event

**11** Wine Tasting: 1 Flight

**12** Save Cancel

**3** Load From Template

Event Detail | Registration | **Billing** | Notifications

Template: No Template

**Existing Fee Types**

Name	Value	Inventory
X Wine Tasting: Apps Only	\$20.00	-

**Fee Assignment**

Primary	No Fee Assigned	<input type="checkbox"/>
Spouse	No Fee Assigned	<input type="checkbox"/>
Child	No Fee Assigned	<input type="checkbox"/>
Adult Guest	No Fee Assigned	<input type="checkbox"/>
Child Guest	No Fee Assigned	<input type="checkbox"/>
TBA	No Fee Assigned	<input type="checkbox"/>

Check the box at right to allow members to select fee type when making a reservation

**Event Times**

Enable Billing

▶ 12/4/2020 7:00 PM-9:00 PM - Monthly Wine Tasting

See More Dates and Time

**Add New Fee Type**

Group: F&B: Food

Category: Club Event

Item: Wine Tasting: Apps Only

Inventory: 0

Value: \$20.00

**4** F&B: Food

**5** Club Event

**6** Wine Tasting: Apps Only

**7** Save Cancel

**13** Load From Template

Event Detail | Registration | **Billing** | Notifications

Template: No Template

**Existing Fee Types**

Name	Value	Inventory
X Wine Tasting: 1 Flight	\$40.00	-
X Wine Tasting: 3 Flights	\$60.00	-
X Wine Tasting: Apps Only	\$20.00	-

**Fee Assignment**

Primary	No Fee Assigned	<input type="checkbox"/>
Spouse	No Fee Assigned	<input type="checkbox"/>
Child	No Fee Assigned	<input type="checkbox"/>
Adult Guest	No Fee Assigned	<input type="checkbox"/>
Child Guest	No Fee Assigned	<input type="checkbox"/>
TBA	No Fee Assigned	<input type="checkbox"/>

Check the box at right to allow members to select fee type when making a reservation

**Event Times**

Enable Billing

▶ 12/4/2020 7:00 PM-9:00 PM - Monthly Wine Tasting

See More Dates and Time

**Add New Fee Type**

Group: F&B: Food

Category: Club Event

Item: Wine Tasting: 3 Flights

Inventory: 0

Value: \$60.00

**14** F&B: Food

**15** Club Event

**16** Wine Tasting: 3 Flights

**17** Save Cancel

## Setting Up an Event with Member Fee Selection

- There are two types of Fee Assignments:
  - Type #1: Allowing members to select their fee type when making a reservation
  - Type #2: Automatically assigning fees to members when they register
- Type #1 is applicable to our Wine Tasting Event because we want members to select either Appetizers Only, 1 Flight of Wine, or 3 Flights of Wine.
- For Type #1:
  - Select the “No Fee Assigned” option from the dropdown for ALL attendee types (Primary, Spouse, Child, Adult Guest, Child Guest and TBA)
  - Select the checkbox next to the attendee types that you want to allow to register.
    - Since our Monthly Wine Tasting Event is an adult only event, we will not check the Child or Child Guest boxes since we don’t want children to be registered however, we do want to allow all other attendee types so we will check the Primary, Spouse, Adult Guests and TBA boxes.

### Edit Event

Event Detail | Registration | Billing | Payments

**Load From Template**

Template:

**Existing Fee Types**

Name	Value	Inventory
X Wine Tasting: 1 Flight	\$40.00	-
X Wine Tasting: 3 Flights	\$60.00	-
X Wine Tasting: Apps Only	\$20.00	-

**Fee Assignment**

Primary	<input type="text" value="No Fee Assigned"/>	<input checked="" type="checkbox"/>
Spouse	<input type="text" value="No Fee Assigned"/>	<input checked="" type="checkbox"/>
Child	<input type="text" value="No Fee Assigned"/>	<input type="checkbox"/>
Adult Guest	<input type="text" value="No Fee Assigned"/>	<input checked="" type="checkbox"/>
Child Guest	<input type="text" value="No Fee Assigned"/>	<input type="checkbox"/>
TBA	<input type="text" value="No Fee Assigned"/>	<input checked="" type="checkbox"/>

Check the box at right to allow members to select fee type when making a reservation

1

**Event Registration**

Logged in as Monroe Pace g

Date Friday, October 02, 2020 7:00 PM

Confirmation New Registration

Party Size 4

**Name**

× Pace, Monroe

No Fee Selected

<tba>

No Fee Selected

<tba>

No Fee Selected

<tba>

No Fee Selected

2

**Name**

× Pace, Monroe

No Fee Selected

No Fee Selected

Wine Tasting: 1 Flight (\$40.00)

Wine Tasting: 3 Flights (\$60.00)

Wine Tasting: Apps Only (\$20.00)

3

**Event Registration**

Logged in as Monroe Pace g

Date Friday, October 02, 2020 7:00 PM

Confirmation New Registration

Party Size 4

**Name**

× Pace, Monroe

Wine Tasting: 3 Flights (\$60.00)

× Pace, Monroe - Spouse

Wine Tasting: 3 Flights (\$60.00)

× Fitzgerald, Suzanne

Wine Tasting: 1 Flight (\$40.00)

× Fitzgerald, John

Wine Tasting: Apps Only (\$20.00)



## Registering for an Event with Member Fee Selection

- Using member Monroe Pace as an example, he is registering for the Monthly Wine Tasting Event for himself, his wife and 2 Guests
- Each attendee is defaulted to “No Fee Selected” when initially added
- A selection then needs to be made for each attendee using the Fee Dropdown
- The system will require a selection for each attendee in order to complete the reservation



## Setting Up an Event with Automatic Fee Assignment

- Here we are demonstrating how to set-up Fee Assignment Type #2: Automatically assigning fees to members when they register
- Type #2 is applicable to our Lobster Bake Event that has 2 items tied to the Event; an Adult Attendee item for \$50.00 and a Child Attendee item for \$25.00
- For Type #2:
  - For each attendee type listed under Fee Assignment, assign the item that should automatically be assigned to them when they register. Do this for Primary, Spouse, Child, Adult Guest, Child Guest and TBA.
  - DO NOT select any of the checkboxes next to the attendee types.
    - Since we are automatically assigning a fee to each attendee type, checking the box to allow fee selection would negate the automatic fee assignment therefore, never use the checkboxes for Automatic Fee Assignment.

Edit Event

Event Detail | Registration | Billing | Payments

Load From Template

Template: No Template

Existing Fee Types

Name	Value	Inventory
X Lobster Night- Adult	\$50.00	-
X Lobster Night- Child	\$25.00	-

Fee Assignment

Primary	Lobster Night- Adult	<input type="checkbox"/>
Spouse	Lobster Night- Adult	<input type="checkbox"/>
Child	Lobster Night- Child	<input type="checkbox"/>
Adult Guest	Lobster Night- Adult	<input type="checkbox"/>
Child Guest	Lobster Night- Child	<input type="checkbox"/>
TBA	Lobster Night- Adult	<input type="checkbox"/>

Check the box at right to allow members to select fee type when making a reservation

**Event Registration** 1

Logged in as **Joey Mac**

Date Friday, October 02, 2020

Time 6:30 AM [199 Available] ▼

Confirmation New Registration

Party Size 5 ▼

Name
X Mac, Joey Lobster Night- Adult \$50.00
<none selected>
<none selected>
<none selected>
<none selected>

**Event Registration** 2

Logged in as **Joey Mac**

Date Friday, October 02, 2020

Time 6:30 AM [199 Available] ▼

Confirmation New Registration

Party Size 5 ▼

Name
X Mac, Joey Lobster Night- Adult \$50.00
X Mac, Joey - Spouse Lobster Night- Adult \$50.00
X Mac, Joey - Child Lobster Night- Child \$25.00
X Mac, Joey - Child Lobster Night- Child \$25.00
X Stone, Sam Lobster Night- Adult \$50.00

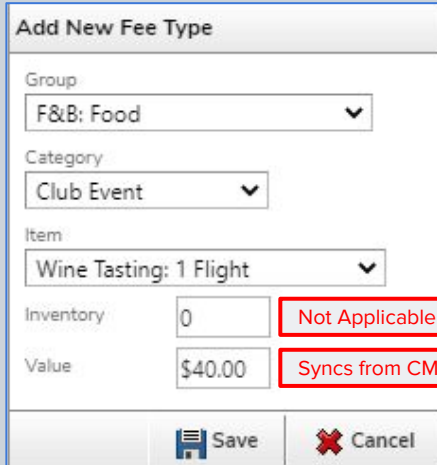
## Registering for an Automatic Fee Assignment Event

- Using member Joey Mac as an example, he is registering 5 attendees for the Lobster Bake; himself, his wife, 2 children and an Adult Guest
- As each attendee is added to the reservation, their fee is automatically populated based their attendee type
- The system does not allow the fee amount to be changed

## Using the Billing Item Inventory Option

### When Adding New Fee Types to an Event for Clubs with **Website + CMA**

- The Inventory option **cannot** be used because it does not sync from CMA to Website.
- The Value option (Item Price) syncs from CMA to Website therefore, the price set in CMA will automatically be populated in Website. The price should never be changed/adjusted in Website.



**Add New Fee Type**

Group  
F&B: Food

Category  
Club Event

Item  
Wine Tasting: 1 Flight

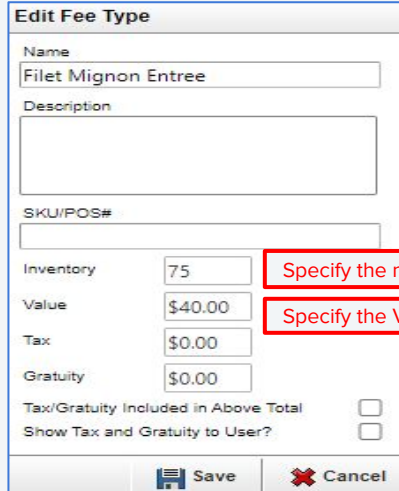
Inventory: 0

Value: \$40.00

Save Cancel

### When Adding New Fee Types to an Event for Clubs with **Website Only**

- The Inventory option can be used to control the number of attendees that you want to allow to register for a specific item. Example: If you only want to allow 75 attendees to order the Filet Mignon, set the Inventory count to 75. Once 75 attendees have registered for the Filet Mignon, it will no longer appear as an option.
- The default Inventory count is 0 which means there is no limit.
- The Value option (Item Price) must be set in Website.



**Edit Fee Type**

Name  
Filet Mignon Entree

Description

SKU/POS#

Inventory: 75

Value: \$40.00

Tax: \$0.00

Gratuity: \$0.00

Tax/Gratuity Included in Above Total

Show Tax and Gratuity to User?

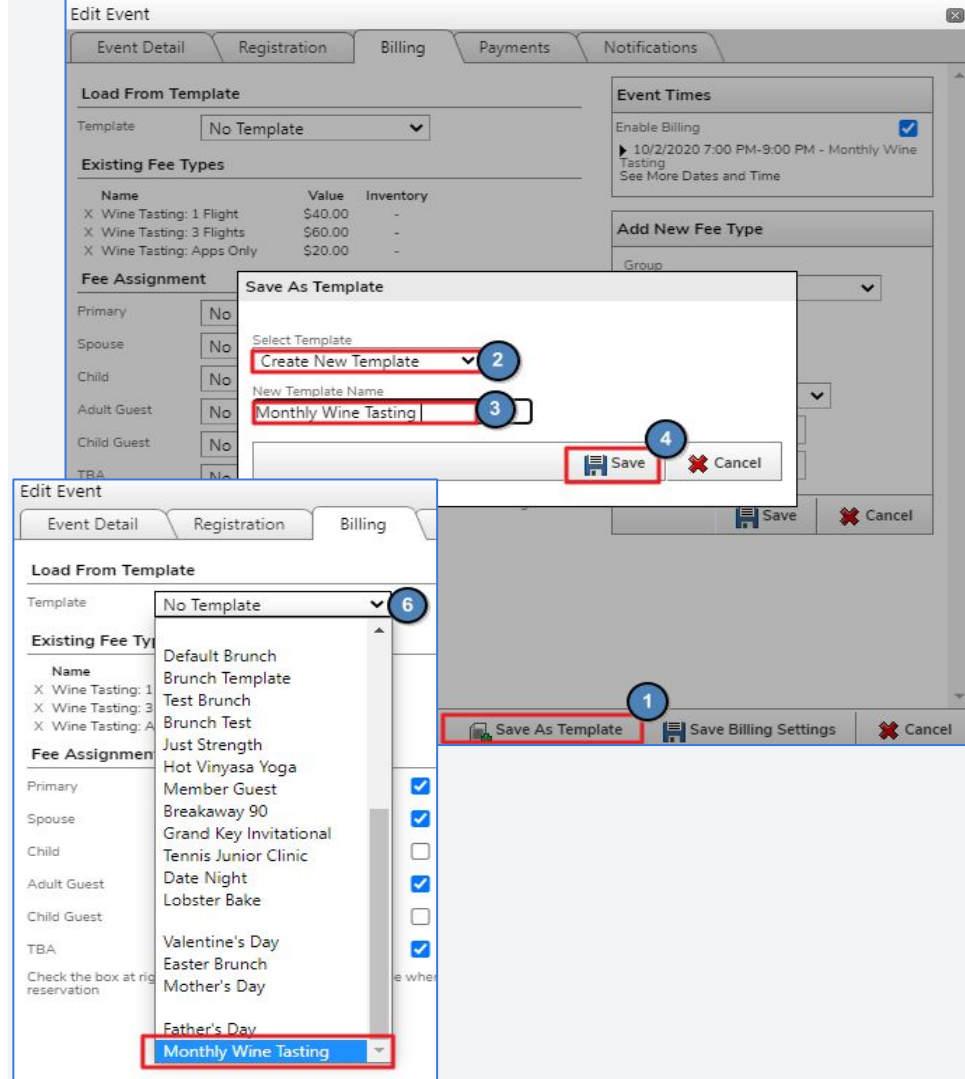
Save Cancel

### Existing Fee Types

Name	Value	Inventory
X Filet Mignon Entree	\$40.00	75
X Lobster Tail Entree	\$45.00	50
X Roasted Chicken Entree	\$30.00	-
X Salmon Entree	\$32.00	-

## Billing Templates

- If you anticipate using your Fee Types and Fee Assignments for future Events, you can save them as a Template instead of having to re-create them from scratch
- To do this, use the **Save As Template** option at the bottom of the modal
- Select **Create New Template** under the **Select Template** dropdown
- Give your template a name and click **Save**
- The next time you are setting up an Event with similar Billing Settings, use the **Load From Template** option instead of adding each item one by one



The screenshot displays the 'Edit Event' interface with the 'Billing' tab selected. The 'Load From Template' section shows a dropdown menu for 'Template' set to 'No Template'. Below this is a table of 'Existing Fee Types' and a 'Fee Assignment' section with checkboxes for various roles. A 'Save As Template' modal is open, showing a 'Select Template' dropdown with 'Create New Template' selected (marked with a red box and a blue circle '2'). The 'New Template Name' field contains 'Monthly Wine Tasting' (marked with a red box and a blue circle '3'). At the bottom of the modal, the 'Save' button is highlighted with a red box and a blue circle '4'. In the background, the 'Save As Template' button at the bottom of the modal is also highlighted with a red box and a blue circle '1'. The 'Template' dropdown in the 'Load From Template' section is also highlighted with a red box and a blue circle '6', showing a list of templates including 'Monthly Wine Tasting' at the bottom, which is highlighted with a red box.

Name	Value	Inventory
X Wine Tasting: 1 Flight	\$40.00	-
X Wine Tasting: 3 Flights	\$60.00	-
X Wine Tasting: Apps Only	\$20.00	-

Role	Assignment
Primary	No
Spouse	No
Child	No
Adult Guest	No
Child Guest	No
TBA	No

Template
No Template
Default Brunch
Brunch Template
Test Brunch
Brunch Test
Just Strength
Hot Vinyasa Yoga
Member Guest
Breakaway 90
Grand Key Invitational
Tennis Junior Clinic
Date Night
Lobster Bake
Valentine's Day
Easter Brunch
Mother's Day
Father's Day
Monthly Wine Tasting



## Introduction to Notifications Tab

---

### Type

Registration Received (Site Default)

Registration Updated (Site Default)

Registration Cancelled (Site Default)

Wait List Registration Received (Site Default)

Admin Registration Received (Global Default)

Admin Registration Updated (Global Default)

Admin Registration Cancelled (Global Default)

Admin Wait List Registration Received (Global Default)

- **Site Default** - Default notifications for every event. Can be changed via Admin bar
- **Registration Received** - Email sent when registration is made.
- **Registration Changed** - Sent when party size or questions are updated.
- **Registration Cancelled** - Sent when reservation is cancelled.
- **Waitlisted** - Sent to members when registering and placed on waitlist.
- **Click on Type name to edit.**

# Updating Event Specific Notifications

Update Subject line, View Preview, and edit the email from this window. Select **Create Notification** to change to **Event Specific** notification. Use **Click To Edit** to use the legacy editor or **Click To Edit - New** to utilize the New Editor.

The image displays two screenshots of the 'Edit Event' interface, illustrating the process of updating a notification.

**Left Screenshot:** The 'Notifications' tab is active. The 'Notification Type' is 'Registration Updated (Site Default)'. The 'Message Subject' is 'Reservation Updated'. The 'Send From Name' and 'Send From Email' are both set to '##DEFAULTNOTIFICATIONEMAIL##'. The 'HTML\_Version' is selected. The preview shows the 'GRAND KEY CLUB' logo and the text: 'Dear ##MEMNAME##, Your ##RESSTATUS## has been updated. EVENT INFORMATION Event: ##EVENTTITLE## Date: ##EVENTDATE## Adults: ##EVENTADULTS## Children: ##EVENTCHILDREN## ##EVENTCUSTOMQ1TEXT## ##EVENTCUSTOMQ1RESPONSE## ##EVENTCUSTOMQ2TEXT## ##EVENTCUSTOMQ2RESPONSE## ##EVENTCUSTOMQ3TEXT## ##EVENTCUSTOMQ3RESPONSE## ##EVENTCUSTOMQ4TEXT## ##EVENTCUSTOMQ4RESPONSE## ##EVENTCUSTOMQ5TEXT## ##EVENTCUSTOMQ5RESPONSE## Comments: ##EVENTCOMMENTS##'. The 'Create Notification' button is highlighted.

**Right Screenshot:** The 'Text Version' of the notification is displayed. The text includes: 'Children: ##EVENTCHILDREN## ##EVENTCUSTOMQ1TEXT## ##EVENTCUSTOMQ1RESPONSE## ##EVENTCUSTOMQ2TEXT## ##EVENTCUSTOMQ2RESPONSE## ##EVENTCUSTOMQ3TEXT## ##EVENTCUSTOMQ3RESPONSE## ##EVENTCUSTOMQ4TEXT## ##EVENTCUSTOMQ4RESPONSE## ##EVENTCUSTOMQ5TEXT## ##EVENTCUSTOMQ5RESPONSE## Comments: ##EVENTCOMMENTS## We look forward to seeing you, Grand Key Club staff'. Below the text is a preview of a promotional banner for 'BOOK AN ONLINE TEE TIME TODAY' featuring a golf ball. The 'Click To Edit - New' button is highlighted. The 'Update Notification' button is also visible.



# Member and Administrator Registration

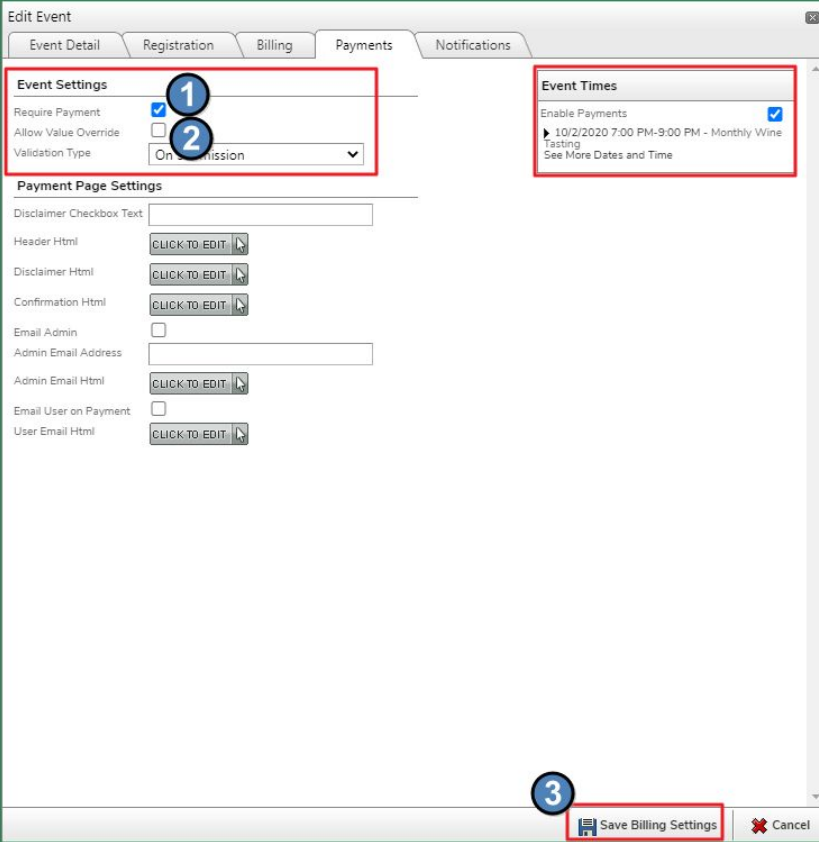
Access via Calendar or through Event Manager.

Reservations can be made as an admin or by impersonating a member

1. Update Party Size
2. Remember to remove your own account
3. Search for desired members
4. Add Child or Spouse if enabled
5. Save Registration

The screenshot shows the 'Event Registration' interface for a 'Monthly Wine Tasting' event on Friday, October 02, 2020 at 7:00 PM. The form is divided into 'Confirmation' and 'New Registration' tabs. A search bar at the top right is labeled 'Search by Last Name or Member #'. The main form area includes a 'Party Size' dropdown set to 4 (callout 1), a 'Name' field with 'Adkins, Robert M.' (callout 2), and a '+spouse | +guests' checkbox (callout 3). Below are four rows for adding guests, each with a 'Name' field and a 'No Fee Selected' dropdown. A 'Total Fees Due' of \$0.00 is shown. At the bottom, there are fields for 'Registration Owner Email' (sleli@clubessential.com) and 'Table Number'. A 'Next Step' button (callout 5) and a 'Close' button are at the bottom right. A list of members is visible on the right side of the screen.

## Enabling Payments



**Edit Event**

Event Detail | Registration | Billing | **Payments** | Notifications

**Event Settings**

Require Payment  1  
Allow Value Override  2  
Validation Type On Admission

**Event Times**

Enable Payments   
▶ 10/2/2020 7:00 PM-9:00 PM - Monthly Wine Tasting  
See More Dates and Time

**Payment Page Settings**

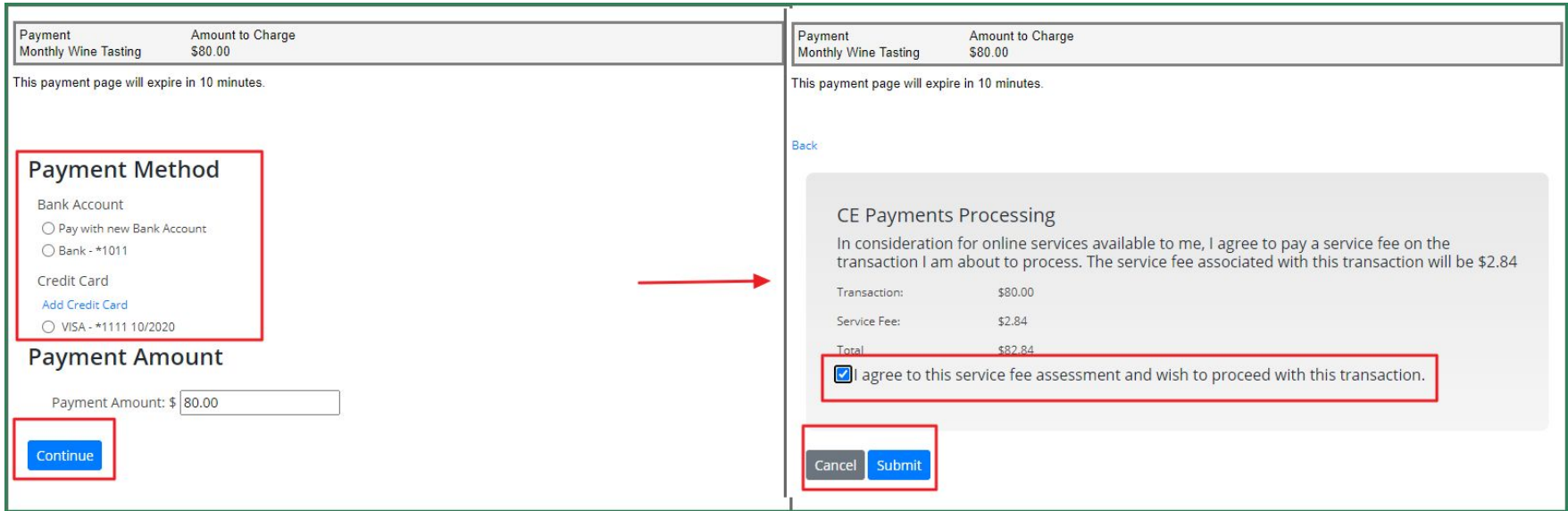
Disclaimer Checkbox Text   
Header Html  CLICK TO EDIT  
Disclaimer Html  CLICK TO EDIT  
Confirmation Html  CLICK TO EDIT  
Email Admin   
Admin Email Address   
Admin Email Html  CLICK TO EDIT  
Email User on Payment   
User Email Html  CLICK TO EDIT

3 Save Billing Settings Cancel

1. Payments can be made required upon submission. This can prevent members from registering for an event without payment.
2. There is an option to allow members to override the event amount when making a payment however I would normally not recommend this option.
3. Select Save Billing Settings to fully enable payments.

## Member Payment Experience

With Payments enabled, members will be taken to a Paycloud portal where they can use an existing account they have already added or even add a new ACH or CC account to pay.



The image shows two side-by-side screenshots of a payment portal. The left screenshot shows the initial payment selection screen, and the right screenshot shows the payment processing screen. A red arrow points from the 'Continue' button in the left screenshot to the 'Submit' button in the right screenshot.

**Left Screenshot: Payment Method Selection**

Payment	Amount to Charge
Monthly Wine Tasting	\$80.00

This payment page will expire in 10 minutes.

**Payment Method**

Bank Account

- Pay with new Bank Account
- Bank - \*1011

Credit Card

[Add Credit Card](#)

- VISA - \*1111 10/2020

**Payment Amount**

Payment Amount: \$

[Continue](#)

**Right Screenshot: CE Payments Processing**

[Back](#)

**CE Payments Processing**

In consideration for online services available to me, I agree to pay a service fee on the transaction I am about to process. The service fee associated with this transaction will be \$2.84

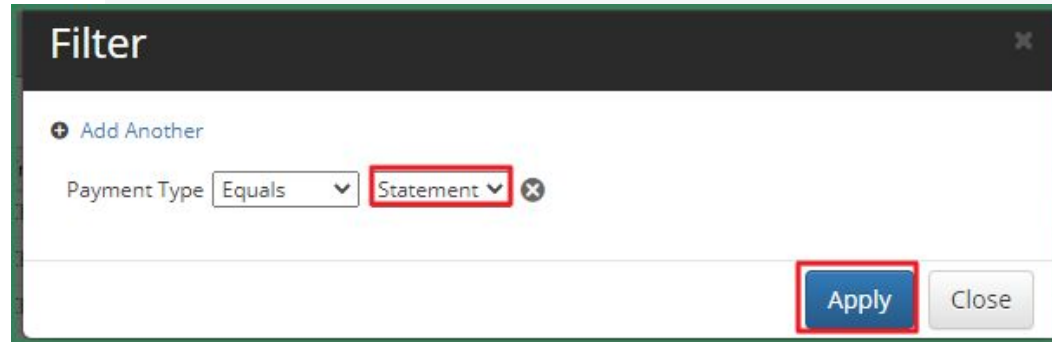
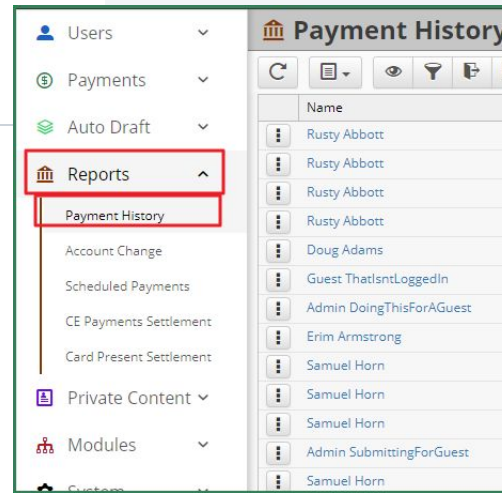
Transaction:	\$80.00
Service Fee:	\$2.84
<b>Total</b>	<b>\$82.84</b>

I agree to this service fee assessment and wish to proceed with this transaction.

[Cancel](#) [Submit](#)

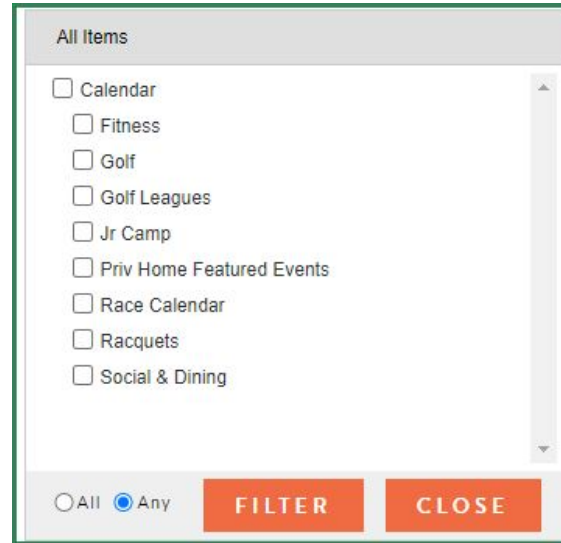
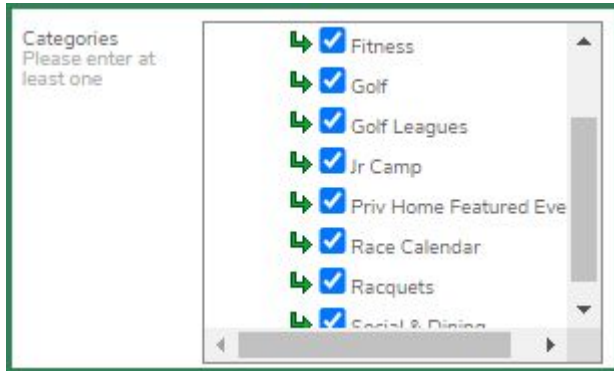
## Paycloud Reporting

- Sign into Paycloud
- Select Reports
- View Payment History
- Use Payment Type filter
- Change dropdown “Payment Type Equals” to Event
- Select Apply



## Interest Area functionality

Interest areas can be subjects like Golf, Tennis, Boating, etc. However they can be absolutely anything such as Public Events, Private Homepage Events, Book Club, etc. Calendars and plugins use filters to only display events based on interest areas.







## How Interest Areas Affect Plugins

---

Calendar plugins located on private home pages and other pages can be set to show specific events based on interest areas. Contact Support if you would like more plugins, or to update any existing plugin

### UPCOMING CLUB EVENTS [View Full Calendar](#)

-  Thursday, September 24th  
Happy Hour!
-  Friday, September 25th  
Pub Night
-  Saturday, September 26th  
Monthly Wine Tasting
-  Sunday, September 27th  
Member-Guest Tournament



# Event Manager Overview

- Accessible via Admin Bar
- Filter Options
  - Date Range
  - Title
  - Member Name
  - Email Address
  - Member Number
- Adjustable Columns
- Click event name for details

## Event Manager

Filters

Date Range: 9/22/2020 to 11/21/2020

Event Title:  Member Name, Email, or #:

Status: All Registration Allowed: Yes

Categories: All

Columns:  Status  Registration Allowed  Registration Numbers  Type  Categories

[REFRESH](#)

[Click here to Perform Action\(s\)](#) [Custom Reports](#) | [Export Event Listing](#) | [Export All Guests](#) | [Print](#) | [Help](#)

<input type="checkbox"/>	Title	Adults	Children	Total	Incomplete	Allowed	Date
<input type="checkbox"/>	Core Strength	0	0	0	0	25	9/22/2020 8:00 AM
<input type="checkbox"/>	Tennis Clinic - Intermediate	1	0	1	0	20	9/22/2020 9:00 AM-10:00 AM
<input type="checkbox"/>	Zumba Lite	0	0	0	0	25	9/22/2020 10:00 AM
<input type="checkbox"/>	Tacos & Tequila	0	0	0	0	75	9/22/2020 3:00 PM-6:00 PM
<input type="checkbox"/>	Yoga	1	0	1	0	25	9/22/2020 4:00 PM
<input type="checkbox"/>	Pilates	0	0	0	0	25	9/22/2020 5:30 PM
<input type="checkbox"/>	Tennis Clinic - Advanced	0	0	0	0	20	9/23/2020 9:00 AM-10:30 AM
<input type="checkbox"/>	Aqua	0	0	0	0	3	9/23/2020 9:00 AM
<input type="checkbox"/>	Zumba Lite	0	0	0	0	25	9/23/2020 10:00 AM
<input type="checkbox"/>	Yoga	0	0	0	0	25	9/23/2020 4:00 PM
<input type="checkbox"/>	Pilates	0	0	0	0	25	9/23/2020 5:30 PM
<input type="checkbox"/>	Tai Chi	0	0	0	0	25	9/23/2020 7:00 PM
<input type="checkbox"/>	Core Strength	0	0	0	0	25	9/24/2020 8:00 AM
<input type="checkbox"/>	Body Sculpt	0	0	0	0	25	9/24/2020 11:00 AM



## Viewing Event Details and Toolbar

### Event Details

« Event List

[Edit Event](#) | [Event Notifications](#) | [View Event](#) | [Email Registrants](#) | [Send Voice Message](#) | [Print](#)

Event Lobster Bake

Date Friday, September 25, 2020

Time 6:00 PM-9:00 PM

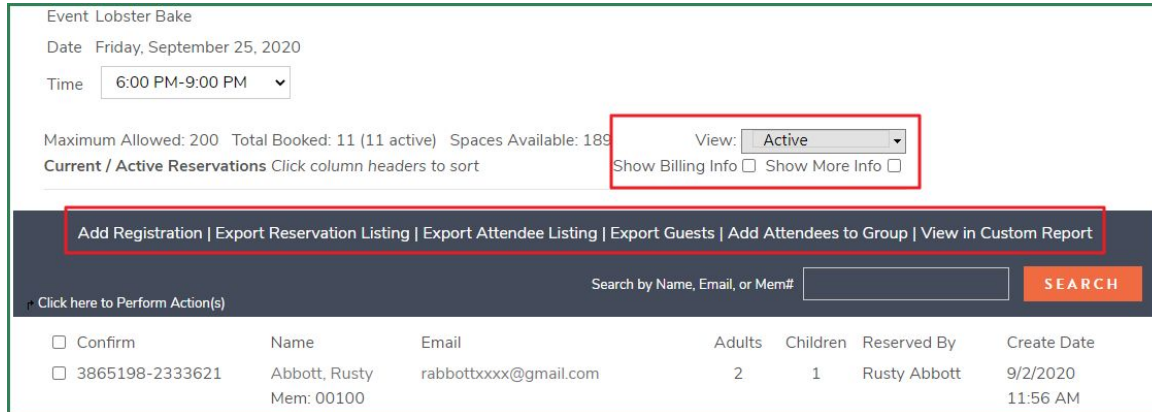
Maximum Allowed: 200 Total Booked: 11 (11 active) Spaces Available: 189 View: Active

Current / Active Reservations Click column headers to sort Show Billing Info  Show More Info

- **Edit Event** - Open event interface
- **Event Notifications** - Opens event notifications tab
- **View Event** - Open event flyer
- **Email Registrants** - Compose email with registrants added to recipients list
- **Send Voice Message** - add-on service
- **Print** - Print event details page from web tab

# The Registration Menu

- **Add Registration** - Add members to events.
- **Export Reservation Listing** - Create CSV file with details per reservation
- **Export Attendee Listing** - CSV with each attendee on individual rows
- **Export Guests** - CSV with lists of guests if enabled
- **Add Attendees to Group** - Create Static group with event attendees
- **View in Custom Report** - View event details in Custom Report
- **Show More Info** - Display extra information such as Administrator notes



Event Lobster Bake  
Date Friday, September 25, 2020  
Time 6:00 PM-9:00 PM

Maximum Allowed: 200 Total Booked: 11 (11 active) Spaces Available: 189  
View: Active  
Show Billing Info  Show More Info

[Add Registration](#) | [Export Reservation Listing](#) | [Export Attendee Listing](#) | [Export Guests](#) | [Add Attendees to Group](#) | [View in Custom Report](#)

Click here to Perform Action(s) Search by Name, Email, or Mem#

<input type="checkbox"/> Confirm	Name	Email	Adults	Children	Reserved By	Create Date
<input type="checkbox"/> 3865198-2333621	Abbott, Rusty Mem: 00100	rabbottxxxx@gmail.com	2	1	Rusty Abbott	9/2/2020 11:56 AM

## Custom Reports Overview

Occasionally the standard reports of reservation and attendee listing might not meet your clubs needs. Custom reports allow administrators to create as simple or as complex reports as desired.

### Event Report Listing

Filters

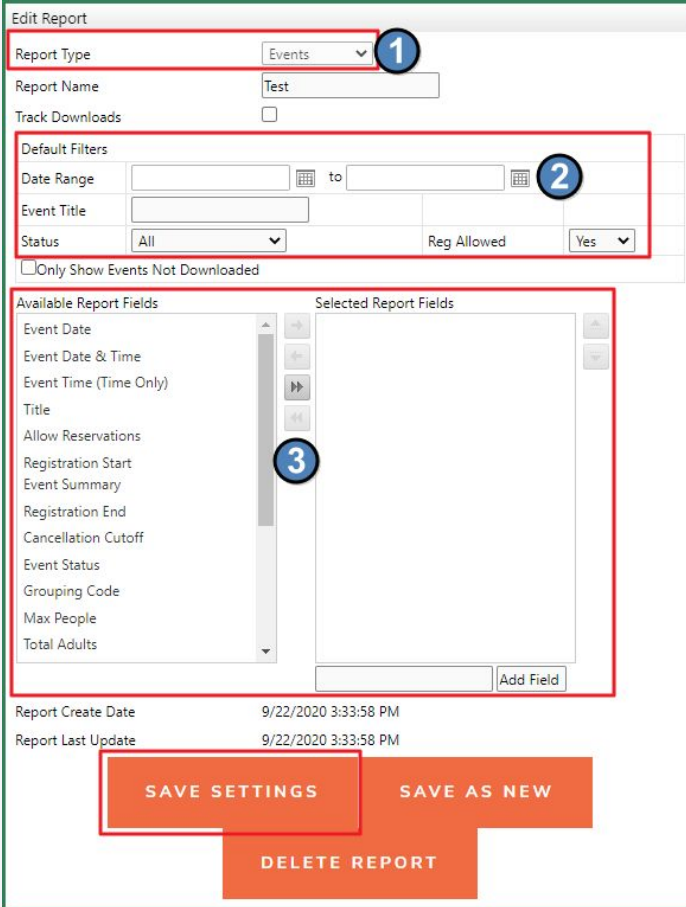
Report Title  Report Type Show All REFRESH

[Create New Report](#) [Return to Event Manager](#)

Local Reports

Name	Report Type	Created	Last Updated
<a href="#">View</a>   <a href="#">Edit</a>   <a href="#">Delete</a>	Registration	9/11/2015 1:05:35 PM	9/11/2015 1:05:35 PM
<a href="#">View</a>   <a href="#">Edit</a>   <a href="#">Delete</a>	Event	3/24/2016 12:45:29 PM	3/24/2016 12:45:29 PM
<a href="#">View</a>   <a href="#">Edit</a>   <a href="#">Delete</a>	Registration	3/24/2016 12:45:43 PM	3/24/2016 12:45:43 PM
<a href="#">View</a>   <a href="#">Edit</a>   <a href="#">Delete</a>	Registration	5/24/2016 1:52:44 PM	5/24/2016 1:53:53 PM
<a href="#">View</a>   <a href="#">Edit</a>   <a href="#">Delete</a>	Registration	5/24/2016 1:54:08 PM	5/24/2016 1:54:08 PM
<a href="#">View</a>   <a href="#">Edit</a>   <a href="#">Delete</a>	Attendee	5/24/2016 1:54:28 PM	5/24/2016 1:54:28 PM

## Creating New Custom Reports



Edit Report

Report Type: Events **1**

Report Name: Test

Track Downloads:

Default Filters

Date Range: [ ] to [ ] **2**

Event Title: [ ]

Status: All Reg Allowed: Yes

Only Show Events Not Downloaded

Available Report Fields

Selected Report Fields

Event Date

Event Date & Time

Event Time (Time Only)

Title

Allow Reservations

Registration Start

Event Summary

Registration End

Cancellation Cutoff

Event Status

Grouping Code

Max People

Total Adults

Add Field

Report Create Date: 9/22/2020 3:33:58 PM

Report Last Update: 9/22/2020 3:33:58 PM

SAVE SETTINGS SAVE AS NEW

DELETE REPORT

- Report Types**
  - Event Report** - Listing of events that meets selected criteria.
  - Registration Report** - Each party will occupy a separate line in the export.
  - Attendee Report** - Attendees will be displayed separately.
- Dates** - Generally used for Event Reports.
- Report Fields** - Use the arrows to add the desired fields to the custom report.



## How to Control Events Showing on Your Mobile POS Device

- The Event must be assigned to the same Area that the Mobile POS device is assigned to
- Per the below set-up, the Monthly Wine Tasting Event will show on Grand Key Club's POS device named: 2-F&B: Grill POS

The Website Event Area equals Grill Room.

Event Title: Monthly Wine Tasting

Event Area: Grill Room

The Grill POS Terminal in CMA is assigned to the Grill Room Area.

Point of Sale

Terminals

ID: Grill POS

Area: Grill Room

The 2-F&B: Grill POS Device in CMA is assigned to the Grill POS Terminal.

Point of Sale

Devices

Name: 2-F&B: Grill POS

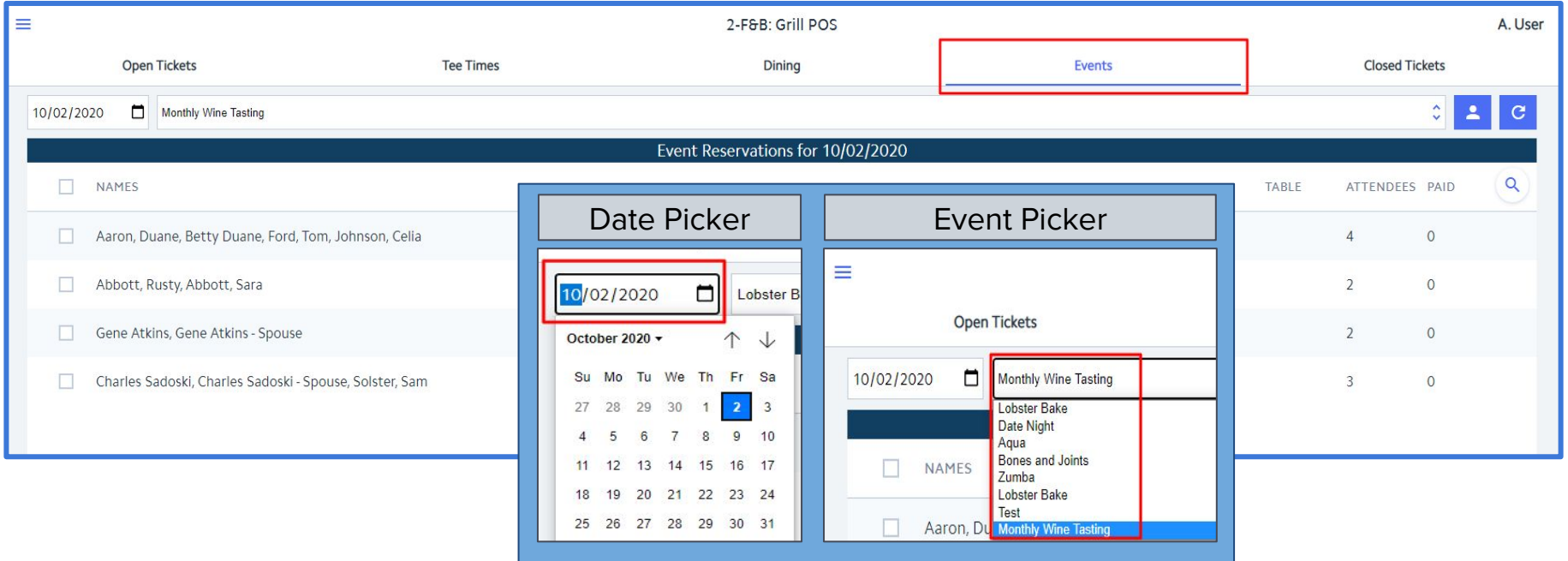
Device Type: Terminal

Terminal Information

Terminal: Grill POS

## Finding Your Events On Your Mobile POS Device

- Events will appear as an option across the top of your Mobile POS device
- The date will always default to the current date; use the Date Picker to select a different date
- Use the Event Picker to select other Events occurring on that date for the Area



The screenshot shows the mobile POS interface for a restaurant named "2-F&B: Grill POS". The user is logged in as "A. User". The "Events" tab is selected and highlighted with a red box. The interface displays a date picker and an event picker for the date 10/02/2020. The event picker shows a list of events, with "Monthly Wine Tasting" selected. The interface also shows a list of attendees and a table of reservations.

**Date Picker**

10/02/2020

October 2020

Su	Mo	Tu	We	Th	Fr	Sa
					2	3
27	28	29	30	1		
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

**Event Picker**

Open Tickets

10/02/2020

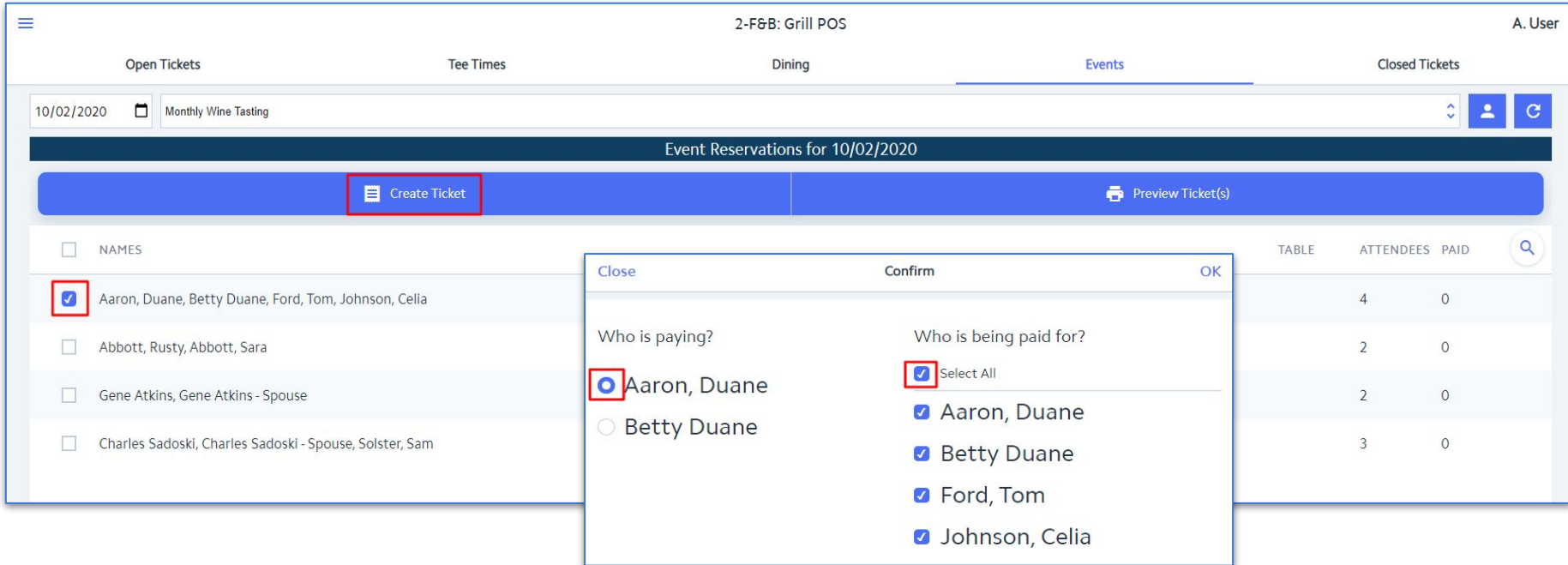
- Monthly Wine Tasting
- Lobster Bake
- Date Night
- Aqua
- Bones and Joints
- Zumba
- Lobster Bake
- Test
- Monthly Wine Tasting

**Event Reservations for 10/02/2020**

NAMES	TABLE	ATTENDEES	PAID
<input type="checkbox"/> Aaron, Duane, Betty Duane, Ford, Tom, Johnson, Celia		4	0
<input type="checkbox"/> Abbott, Rusty, Abbott, Sara		2	0
<input type="checkbox"/> Gene Atkins, Gene Atkins - Spouse		2	0
<input type="checkbox"/> Charles Sadoski, Charles Sadoski - Spouse, Solster, Sam		3	0

## Checking In Event Registrants

- Click on the Member Registration you want to check-in
- Click Create Ticket
- Select Who is paying and Who is being paid for



The screenshot displays the Clubessential interface for checking in event registrants. The top navigation bar includes 'Open Tickets', 'Tee Times', 'Dining', 'Events', and 'Closed Tickets'. The current view is for '10/02/2020' under the 'Monthly Wine Tasting' event. A modal dialog box titled 'Create Ticket' is open, showing a list of registrants and a confirmation screen.

**Registrants List:**

NAME	TABLE	ATTENDEES	PAID
<input checked="" type="checkbox"/> Aaron, Duane, Betty Duane, Ford, Tom, Johnson, Celia	4	0	
<input type="checkbox"/> Abbott, Rusty, Abbott, Sara	2	0	
<input type="checkbox"/> Gene Atkins, Gene Atkins - Spouse	2	0	
<input type="checkbox"/> Charles Sadoski, Charles Sadoski - Spouse, Solster, Sam	3	0	

**Create Ticket Dialog:**

Who is paying?

- Aaron, Duane
- Betty Duane

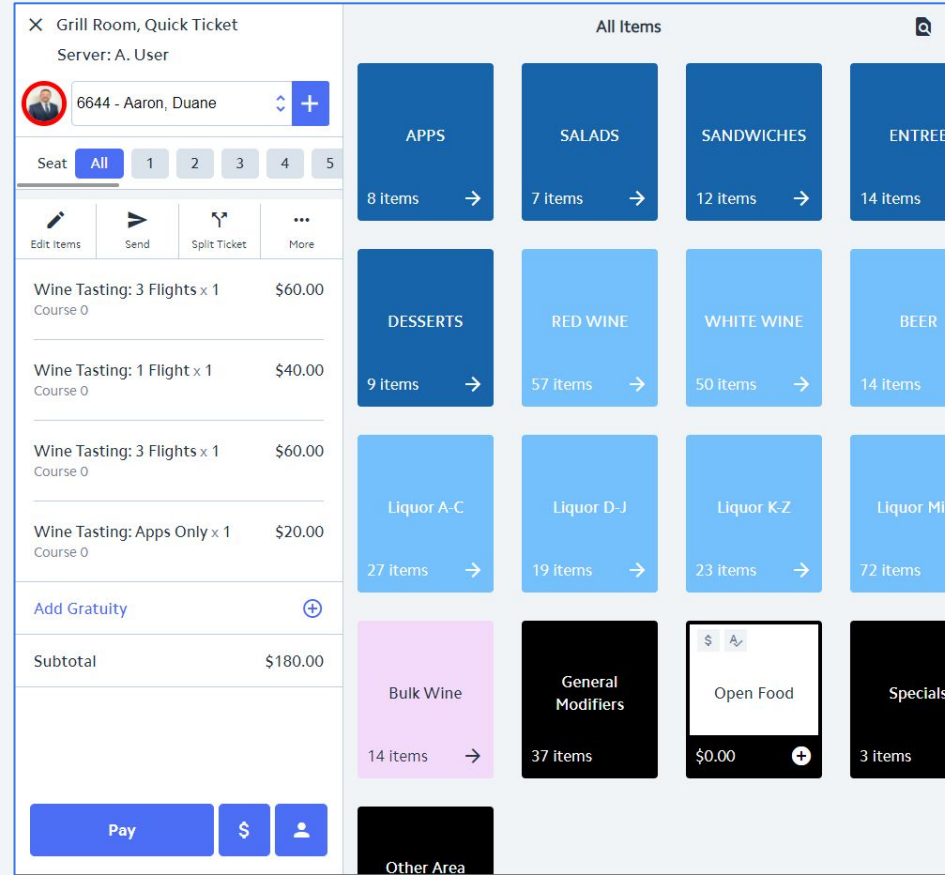
Who is being paid for?

- Select All
- Aaron, Duane
- Betty Duane
- Ford, Tom
- Johnson, Celia



## Automatic Ticket Creation

- A ticket is automatically created for Duane with all 4 Event items he registered for and their associated price
- You have the option of charging Duane out immediately for the ticket or leaving it open for additional purchases and settling at the end of the Event



The screenshot displays a POS interface for a 'Grill Room, Quick Ticket' created by server 'A. User'. The ticket is for '6644 - Aaron, Duane' at 'Seat All 1'. The order includes four wine tasting items: 'Wine Tasting: 3 Flights x 1 Course 0' (\$60.00), 'Wine Tasting: 1 Flight x 1 Course 0' (\$40.00), 'Wine Tasting: 3 Flights x 1 Course 0' (\$60.00), and 'Wine Tasting: Apps Only x 1 Course 0' (\$20.00). The subtotal is \$180.00. The interface also features a grid of menu categories: APPS (8 items), SALADS (7 items), SANDWICHES (12 items), ENTREE (14 items), DESSERTS (9 items), RED WINE (57 items), WHITE WINE (50 items), BEER (14 items), Liquor A-C (27 items), Liquor D-J (19 items), Liquor K-Z (23 items), Liquor M (72 items), Bulk Wine (14 items), General Modifiers (37 items), Open Food (\$0.00), and Specials (3 items). A search icon is visible in the top right of the menu grid.



# Event Tab Appearance After Ticket Creation

- Event registrations that are completely settled/closed are highlighted in green on the Events tab

2-F&B: Grill POS

Open Tickets Tee Times Dining **Events** Closed Tickets

10/02/2020 Monthly Wine Tasting

Event Reservations for 10/02/2020

<input type="checkbox"/> NAMES	TABLE	ATTENDEES	PAID
<input checked="" type="checkbox"/> Aaron, Duane, Betty Duane, Ford, Tom, Johnson, Celia		4	4
<input type="checkbox"/> Abbott, Rusty, Abbott, Sara		2	0

- Event registrations for which tickets have been opened but are not yet closed are highlighted in yellow

2-F&B: Grill POS

Open Tickets Tee Times Dining **Events** Closed Tickets

10/02/2020 Monthly Wine Tasting

Event Reservations for 10/02/2020

<input type="checkbox"/> NAMES	TABLE	ATTENDEES	PAID
<input type="checkbox"/> Aaron, Duane, Betty Duane, Ford, Tom, Johnson, Celia		4	0
<input type="checkbox"/> Abbott, Rusty, Abbott, Sara		2	0

Close Confirm OK

Who is paying?

- Gilbert Davis
- Donald E. Dillard
- Kathryn Dillard
- Gilbert Davis - Spouse

Who is being paid for?

- Select All
- Gilbert Davis
- Donald E. Dillard
- Kathryn Dillard
- Gilbert Davis - Spouse

X Grill Room, Quick Ticket  
Server: A. User

6656 - Davis, Gilbert

Seat All 1 2 3 4 5

Edit Items Send Split Ticket More

Wine Tasting: 1 Flight x 1 Course 0	\$40.00
Wine Tasting: 1 Flight x 1 Course 0	\$40.00
<a href="#">Add Gratuity</a>	
<b>Subtotal</b>	<b>\$80.00</b>

Close **Ticket #6656** Print

Print To  
Grill Bar POS Receipt

Tkt #: 6656 09/15/20 09:56 AM  
Grill Room Tbl: Quick Ticket  
Covers: 0 Staff:Administrative U.  
(00138) Davis, Mr. Gilbert

2 Wine Tasting: 1 Flight \$80.00

Sub Total: \$80.00  
Service Charge: \$16.00  
No Tax: \$0.00  
Sales Tax 7%: \$6.86

Total: \$102.86

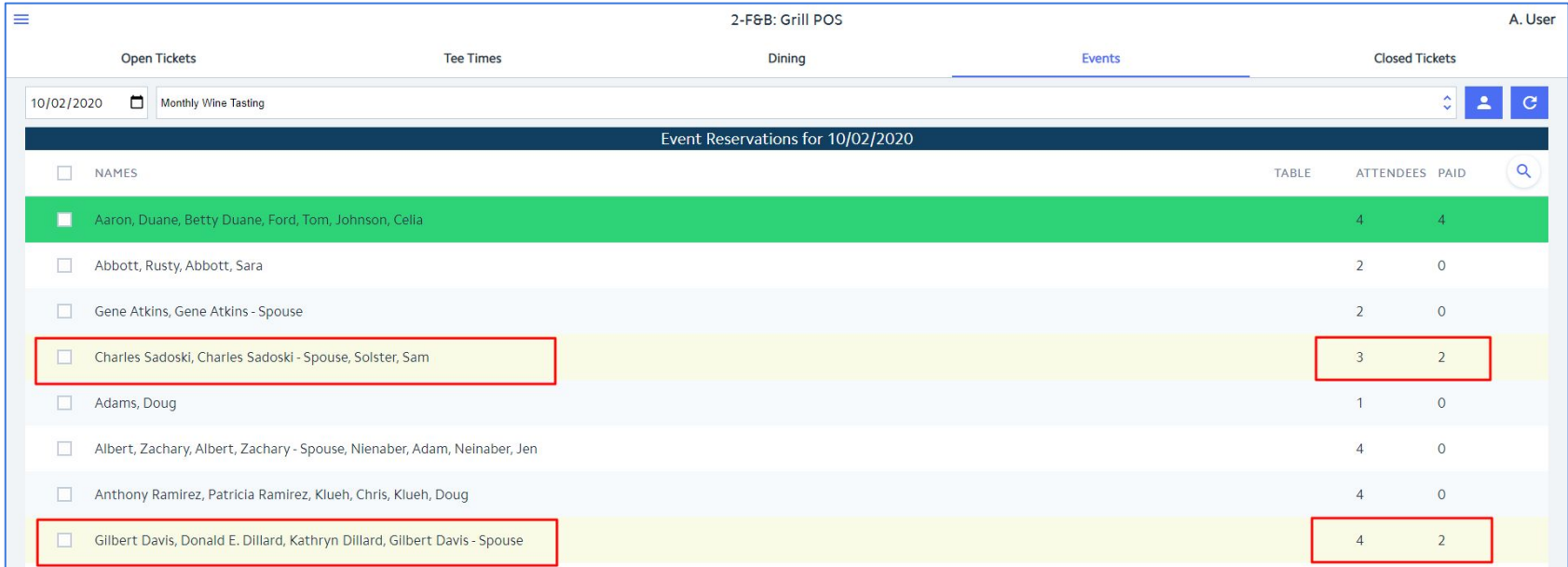
**Member Charge: \$102.86**

## Opting to Pay for Part of the Attendees but not All Attendees

- In this example, Gilbert Davis has made a reservation for the Monthly Wine Tasting event for 4 attendees but is opting to pay for only he and his wife and not for Donald Dillard and his wife
- After clicking OK, a ticket is created for Gilbert containing only the items that he and his wife registered for
- For the sake of this example, we will settle and close Gilbert's ticket immediately

## Attendees vs. Paid Counts

- Registrations that include a combination of paid attendees and unpaid attendees will be highlighted in yellow. The Attendee Count and Paid Count can be used to determine how many attendees still need to pay.



2-F&B: Grill POS A. User

Open Tickets Tee Times Dining Events Closed Tickets

10/02/2020 Monthly Wine Tasting

Event Reservations for 10/02/2020

<input type="checkbox"/> NAMES	TABLE	ATTENDEES	PAID
<input checked="" type="checkbox"/> Aaron, Duane, Betty Duane, Ford, Tom, Johnson, Celia		4	4
<input type="checkbox"/> Abbott, Rusty, Abbott, Sara		2	0
<input type="checkbox"/> Gene Atkins, Gene Atkins - Spouse		2	0
<input type="checkbox"/> Charles Sadoski, Charles Sadoski - Spouse, Solster, Sam		3	2
<input type="checkbox"/> Adams, Doug		1	0
<input type="checkbox"/> Albert, Zachary, Albert, Zachary - Spouse, Nienaber, Adam, Neinaber, Jen		4	0
<input type="checkbox"/> Anthony Ramirez, Patricia Ramirez, Klueh, Chris, Klueh, Doug		4	0
<input type="checkbox"/> Gilbert Davis, Donald E. Dillard, Kathryn Dillard, Gilbert Davis - Spouse		4	2



## Opening Another Ticket for a Partially Paid Registration

- Clicking on the checkbox next to Gilbert's registration on the Events tab will present the "Who is paying?" and "Who us being paid for?" options
- All registered Members are always listed as "Who is paying?" options
- Only attendees that have not yet been accounted for via an open or closed ticket will be listed as "Who is being paid for?" options
- In this example, Donald Dillard will pay for he and his wife
- After clicking OK, a ticket is created for Donald containing only the items that he and his wife registered for
- For the sake of this example, we will settle and close Donald's ticket immediately and can now see that Gilbert's registration is paid in full

**1** Close Confirm OK

Who is paying?

- Gilbert Davis
- Donald E. Dillard
- Kathryn Dillard
- Gilbert Davis - Spouse

Who is being paid for?

- Select All
- Donald E. Dillard
- Kathryn Dillard

**2** Grill Room, Quick Ticket  
Server: A. User

6657 - Dillard, Donald E. +

Seat All 1 2 3 4 5

Edit Items Send Split Ticket More

Wine Tasting: 3 Flights x 1 \$60.00  
Course 0

Wine Tasting: 3 Flights x 1 \$60.00  
Course 0

Add Gratuity +

Subtotal \$120.00

**3** Ticket #6657 Print

Print To  
Grill Bar POS Receipt

Tkt #: 6657 09/15/20 10:01 AM  
Grill Room Tbl: Quick Ticket  
Covers: 0 Staff: Administrative U.  
(01652) Dillard, Mr. Donald E.

2 Wine Tasting: 3 Flights \$120.00

Sub Total: \$120.00  
Service Charge: \$24.00  
No Tax: \$0.00  
Sales Tax 7%: \$10.28

Total: \$154.28

Member Charge: \$154.28

**4** Gilbert Davis, Donald E. Dillard, Kathryn Dillard, Gilbert Davis - Spouse 4 4



## Ticket Status Changes Will Impact the Registration Status

- As indicated below, Duane's registration is paid in full. Duane paid for all 4 attendees himself on 1 ticket: Ticket #6644

Aaron, Duane, Betty Duane, Ford, Tom, Johnson, Celia

4

4

- If Ticket #6644 is Re-Opened, Duane's Event Registration Status will change to being highlighted in yellow indicating that a ticket has been opened but not yet settled.

Aaron, Duane, Betty Duane, Ford, Tom, Johnson, Celia

4

0

- If Ticket #6644 is Deleted, Duane's Event Registration Status will change to being unhighlighted indicating that a ticket has not yet been created for this Event Registration.

Aaron, Duane, Betty Duane, Ford, Tom, Johnson, Celia

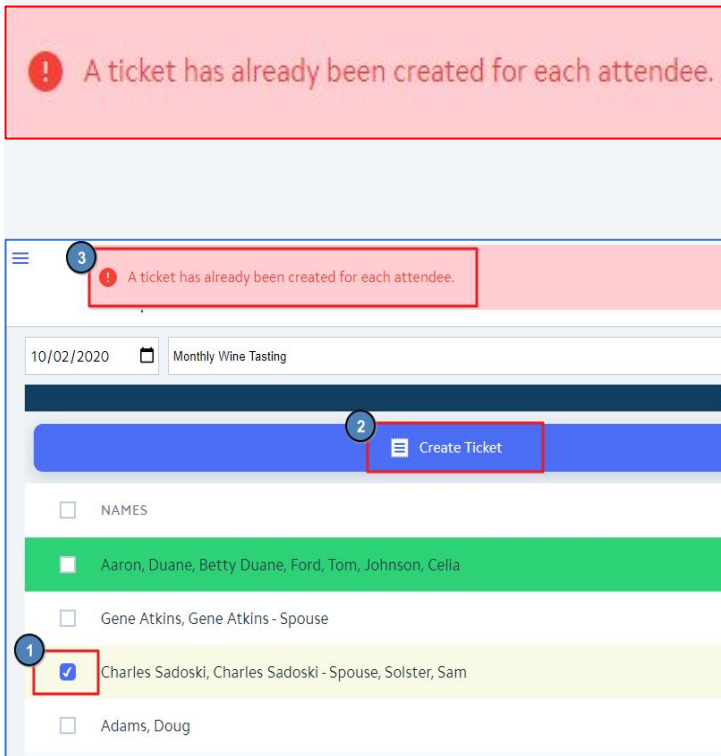
4

0



## Trying to Create a Ticket When All Attendee Tickets Have Been Created

- If tickets have already been created for all attendees included in an Event registration, trying to generate any additional tickets for the registration will result in an error being displayed on the POS device stating “A ticket has already been created for each attendee.”
- This is important to note since a yellow highlighted row only tells you that at least 1 attendee ticket has been created, but does not tell you if there are remaining attendees that still need tickets.
- The warning message will prevent you from creating unnecessary/duplicate tickets and alert you to navigate to the Open Tickets tab to find the already created tickets.



## Previewing Tickets from the Event Tab

- When previewing tickets for a reservation consisting of multiple tickets, clicking the Close option on each ticket will walk you through the series of tickets within the reservation.

Event Reservations for 10/02/2020

Create Ticket Preview Ticket(s)

NAMES

- Aaron, Duane, Betty Duane, Ford, Tom, John
- Gene Atkins, Gene Atkins - Spouse
- Charles Sadoski, Charles Sadoski - Spouse, S
- Adams, Doug
- Albert, Zachary, Albert, Zachary - Spouse, N
- Anthony Ramirez, Patricia Ramirez, Klueh, C
- Gilbert Davis, Donald E. Dillard, Kathryn Dill

**Close** Ticket #6656 Print To

Print To  
Grill Bar POS Receipt

Club at Grand Key  
(800) 487-1617  
grandkeyclub.com

Tkt #: 6656 09/15/20 09:56 AM  
Grill Room Tbl: Quick Ticket  
Covers: 0 Staff: Administrative U.  
(00138) Davis, Mr. Gilbert

2 Wine Tasting: 1 Flight \$80.00

**Close** Ticket #6657 Print To

Print To  
Grill Bar POS Receipt

Club at Grand Key  
(800) 487-1617  
grandkeyclub.com

Tkt #: 6657 09/15/20 10:01 AM  
Grill Room Tbl: Quick Ticket  
Covers: 0 Staff: Administrative U.  
(01652) Dillard, Mr. Donald E.

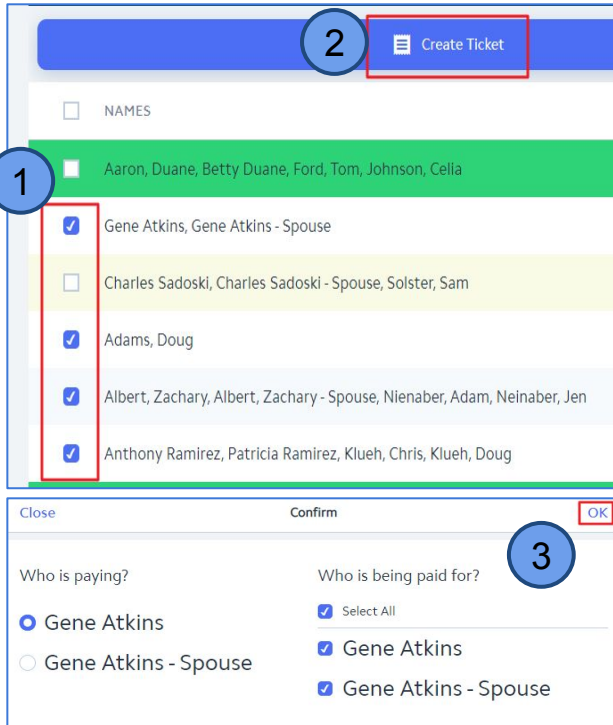
2 Wine Tasting: 3 Flights \$120.00

TABLE	ATTENDEES	PAID
	4	4
	2	0
	3	2
	1	0
	4	0
	4	0
	4	4



# Bulk Ticket Creation for All/Many Event Registrants

You have the option of creating tickets for all (or many) registrants at one time; Bulk Check-in. Select the registrations you want to include in Bulk Check-in and click Create Ticket. The system will walk you through each registration sequentially until tickets have been created for each of the selected registrations. Once complete, you will be taken to the last ticket opened.



2

1  NAMES

Aaron, Duane, Betty Duane, Ford, Tom, Johnson, Cella

Gene Atkins, Gene Atkins - Spouse

Charles Sadoski, Charles Sadoski - Spouse, Solster, Sam

Adams, Doug

Albert, Zachary, Albert, Zachary - Spouse, Nienaber, Adam, Neinaber, Jen

Anthony Ramirez, Patricia Ramirez, Klueh, Chris, Klueh, Doug

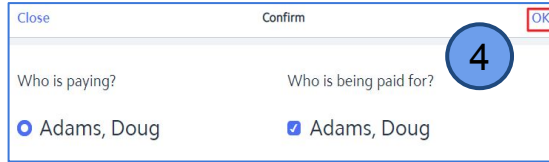
Close Confirm

Who is paying? Who is being paid for?

Gene Atkins  Select All

Gene Atkins - Spouse  Gene Atkins

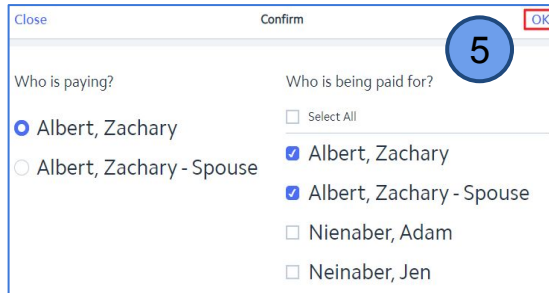
Gene Atkins - Spouse



Close Confirm

Who is paying? Who is being paid for?

Adams, Doug  Adams, Doug



Close Confirm

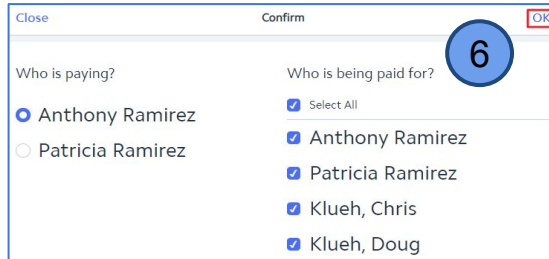
Who is paying? Who is being paid for?

Albert, Zachary  Select All

Albert, Zachary - Spouse  Albert, Zachary

Nienaber, Adam  Albert, Zachary - Spouse

Neinaber, Jen



Close Confirm

Who is paying? Who is being paid for?

Anthony Ramirez  Select All

Patricia Ramirez  Anthony Ramirez

Patricia Ramirez

Klueh, Chris

Klueh, Doug



Grill Room, Quick Ticket

Server: A. User

6684 - Ramirez, Anthony

Seat **All** 1 2 3 4 5

Edit Items Send Split Ticket More

Wine Tasting: 3 Flights x 1 \$60.00  
Course 0

Wine Tasting: 3 Flights x 1 \$60.00  
Course 0

Wine Tasting: 3 Flights x 1 \$60.00  
Course 0

Wine Tasting: 3 Flights x 1 \$60.00  
Course 0

Add Gratuity

Subtotal \$240.00



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# Q&A

