



Golf Reporting

October 6th 2:00 PM EST



Ask a Question at Any Time!

Questions will be addressed at the end of the webinar.

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



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Josh Morrison

Agenda

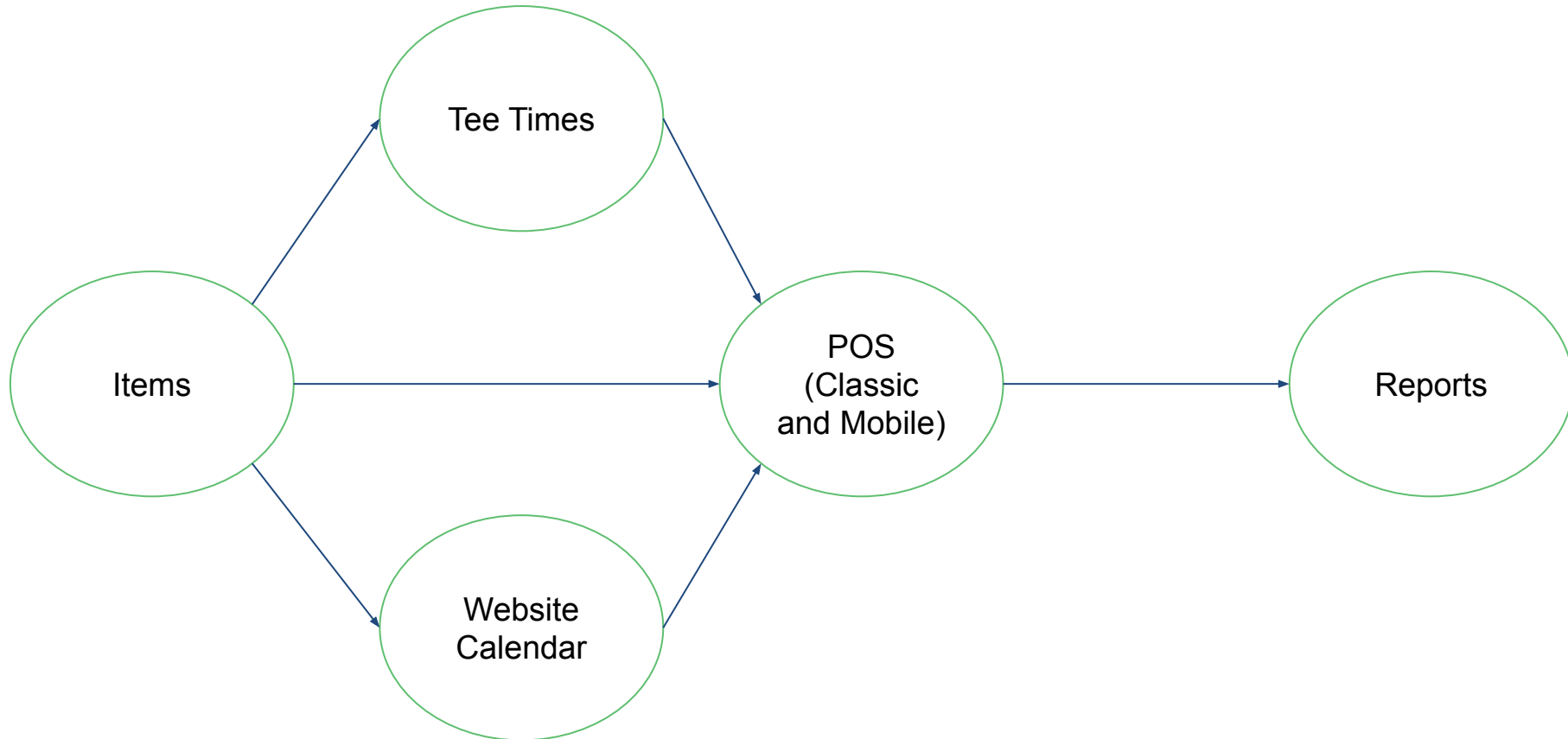


- Why Quality Golf Rounds Reporting is Vital to Your Club
- Understanding how the rounds are built
- Connecting the Rounds items to the Tee Sheet
- The various ways to build and charge a Tee time
- Where to find the Golf Round and other Tee time related Reports
- Understanding the information provided in the reports
- Questions & Answers

Why Golf Rounds are Vital

- Cognizance of Course Utility
- Track sales and revenue based on usage
- Understand what transportation options members prefer
- Motivate less frequent players
- Engage members who frequent the courses
- Determine any prospects from guest play







Ensure Accuracy

How to set up data to flow into your reports

Building Golf Round Items in Office

Prior to saving...

1. Turn on **Round of Golf**
2. Select the toggle for **Retail Item**
3. If applicable, select the checkmark for **Credit Book Eligible**
4. The **Item Category** will come into play in a later step
5. Click **Save**

The screenshot shows the 'Manage Items' window with the following details:

- Item Setup** (Left Panel):
 - Inventory
 - Labels
 - Pictures
 - Point Of Sale
 - Button Style
 - Print Configuration
 - Modifiers
 - Recipe
 - Voucher

Main Form Fields:

- Name: Member Hole 18 Round
- Description: Member Hole 18 Round
- Retail Price: \$37.00
- Member Price: \$37.00
- Item Category: Golf Green Fees
- Qty On Hand: 0
- Average Cost: \$0.00

Checkboxes and Toggles:

- Ask For Price
- Ask For Name
- Ask For Quantity
- Credit Book Eligible
- Inventoried Item
- Track Countdown
- Daily Special
- Auto Increment Seat
- Auto Increment Cover
- Disable ability to discount
- Active
- Dont Display at POS
- Round Of Golf
- Suppress on Statement Detail
- Ask For Guest
- Tax Inclusive
- Allow Fractional Quantity Price

Radio Buttons:

- FrnB Item
- Retail Item
- Billing Item

Account Selections:

- Sales Account: (None)
- Comp Account: (None)
- Discount Account: (None)
- Rewards Account: (None)
- Asset Account: (None)
- Asset Adjustment Account: (None)
- COGS Account: (None)
- COGS Adjustment Account: (None)

Customizing Golf Rounds in Office

Manage Items x

Home Member 18 Hole Round x

Item Setup

- Golf Rounds Setup**
- Inventory
- Labels
- Pictures
- Point Of Sale
 - Button Style
 - Print Configuration
 - Modifiers
 - Recipe
 - Voucher

1 Name: Member 18 Hole Round

Description: Member 18 Hole Round 2065

Retail Price: \$37.00

Member Price: \$37.00

Golf Fee Category: Full Round

Time of Week: Everyday

Golf Fee Type: Everyday

2 Golf Fee Category: Full Round

3 Time of Week: Everyday

4 Golf Fee Type: Member

Lookup Value

Name	Description	Golf Fee Category Type	Multiplier
Full Round	Full Round	Round	1.00
Half Round	Half Round	Round	0.50
Full Cart	Full Cart	Cart	1.00
Half Cart	Half Cart	Cart	0.50
Other	Other	Other	1.00

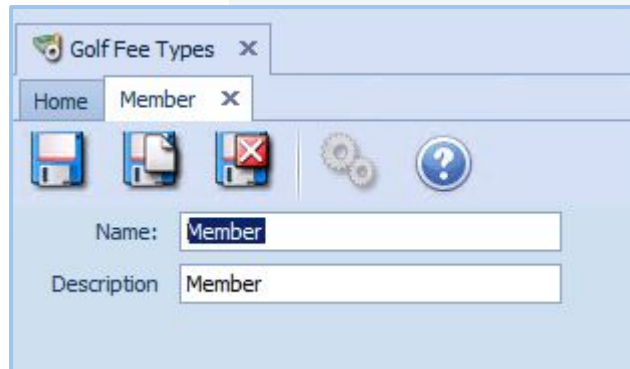
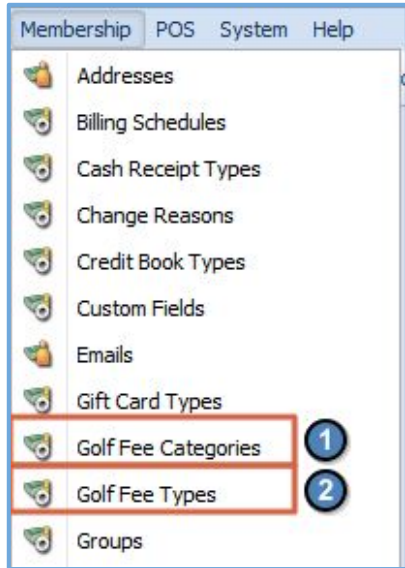
Quick Add

Name	Description
Member	Member
Guest	Guest
Junior	Junior
Tournament	Tournament
Comp	Comp
Outside Tournament	Outside Tournament
Member Event	Member Event
PGA	PGA
School	School
League	League
Other	Other

Important Items to Note After Saving

1. Customizing the Golf Round for reporting
2. Choose a Category
3. Choose a Time
4. Choose a Type

SAVE



Finding The Breakdown

1. Membership>Golf Fee Categories
2. Membership>Golf Fee Types

Category

3. Determines the type of category
4. Determines how much weight each round is worth.

Type

Golf Fee type is a string value for reporting.

Adding the Item to the Tee Sheet

1. Ensure the items are syncing to the website.
2. Build a spreadsheet of all new items based on the template provided
 - a. Item Name
 - b. ID
 - c. Price
 - d. Type (Green, Guest, Option)
 - e. Parameters (member type, season, round length, Etc.)
 - f. Synced to website (Checkbox)
3. Send an email to support@clubessential.com

Office Grid View

Name	ID	Item Price	Item Category	Golf Round
Member 18 Hole Round	4211	\$37.00	Golf Green Fees	<input checked="" type="checkbox"/>

Excel Sheet Template with example

A	B	C	D	E	F
Item Name	ID	Price	Type (Green, Guest, Option)	Parameters (member type, season, round length, Etc.)	Synced to the website
Member 18 Hole Round	4211	37	Green	All members when they play 18 holes	<input checked="" type="checkbox"/>

Connecting Items to the Tee Sheet

1. Click on system
2. Click on system settings
3. Choose the Web Site drop down
4. Select Clubessential
5. Double-click web URL

General Ledger Guests Guest Rooms Membership **System** Help

Go To Club Website Support Request

Club Intelligence Dashboard System Settings

Settings Log

Integration Settings

Sync Frequency

Endpoints

Web Site

- Clubessential
- ClubSoft Links
- CRM

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

General Ledger Guests Guest Rooms Membership POS System Help

Go To Club Website Support Request Select Theme

Club Intelligence Dashboard System Settings

Settings Log

Integration Settings

Sync Frequency: 3

Hide Web Visibility Options

Endpoints

Web Site

- Clubessential
- ClubSoft Links
- CRM
- Office Cloud

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

🏠 Navigating the Endpoint Editor

1. The Item Category Tab
2. Adding New Categories to the Sync (See next Slide)
3. Removing Categories from the Sync
4. Saving the endpoint

Clubessential Endpoint Editor

Endpoint Settings

Name: EP1

Club Url: <https://demo.grandkeyclub.com> Validate

Username: APIAdmin

Password: Club3g0f

- Events in POS
- Activities in POS
- Dining in POS
- Tee Times in POS
- Disable syncing this endpoint
- Push Members
- Pull Members
- Push Member Groups
- Pull Member Groups
- Ignore duplicate emails, phones and addresses
- Push Member Images
- Pull Member Images
- Push Employees
- Pull Employees

Online Orders

Enable Online Orders in POS

1 Automatically send online orders to the kitchen 10 minutes before pickup.

Item Category Member Type Resigned Member Status Member Group Employee Type Resigned Employee Status Custom Fields Sync Log

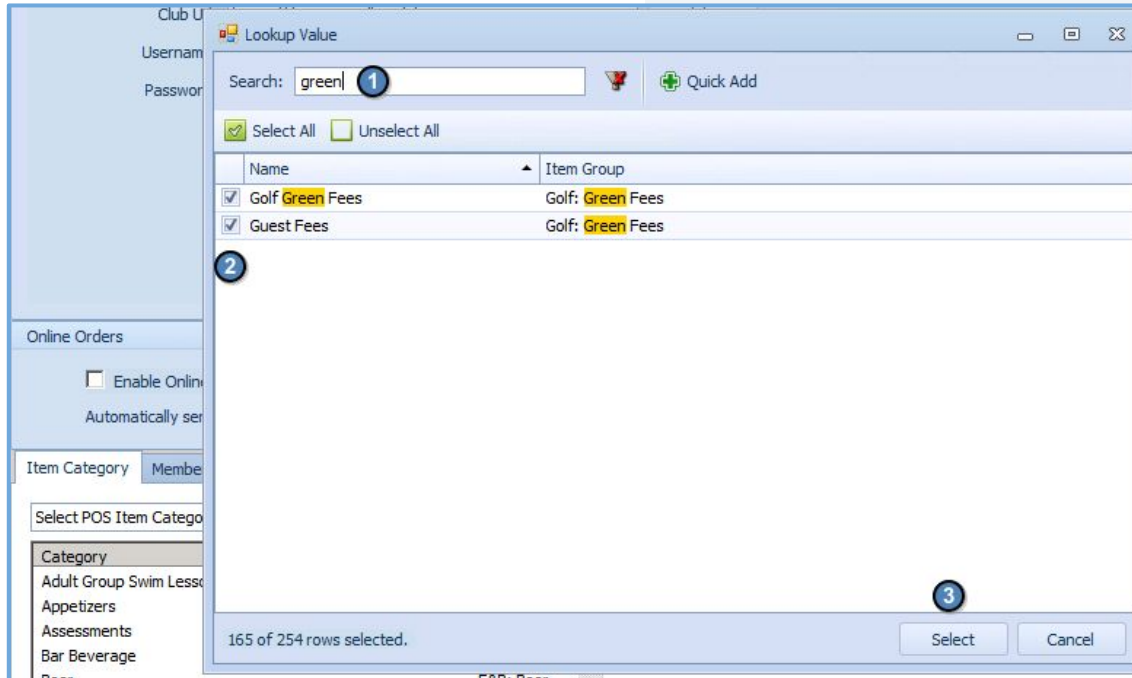
Select POS Item Categories... 2

Category	Item Group
Adult Group Swim Lesson	Swim: Lessons/Clinics
Appetizers	F&B: Food
Assessments	Dues & Recurring
Bar Beverage	F&B: Bar Beverage
Beer	F&B: Beer
Beer-Bqt	F&B: Beer
Beverage	F&B: Bar Beverage
Brk Entree	F&B: Food

Remove Selected 3

*Always save the system settings after the endpoint to ensure your updates are fully saved.

How to Add a New Category



1. Search for the category
2. Check the box
3. Choose select to add it to the list of synced categories.

7 Most Commonly Used Parameters in Fee Defaults

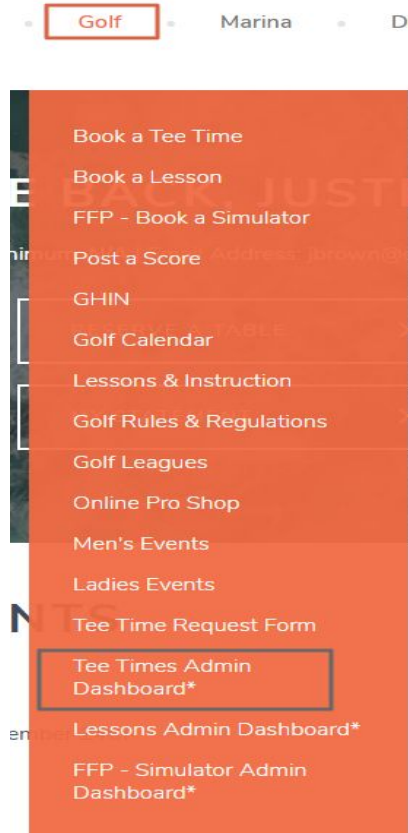
1. Member Type
2. Guest Type
3. Season
4. Round Length (9/18)
5. Time of Day
6. Day of the Week
7. Transportation Option



Employ Process

Creating and Charging out a Tee Time

↳ Navigating to the Admin Tee Sheet on the Website



This will vary based on club website build. It is not only admin bookings, but any member booking will count toward the total rounds reporting if they meet the parameters of the Fee Default rules.

Navigating to The Admin Tee sheet in Classic POS

Clubessential Office: Club at Grand Key 3-Golf: POS: Administrative User: F&B

New Transaction (+)

Tickets Labor Specials Contest Messages Activities **Tee Times** Events

Time Keeping Clock Out
Recipe Options
Open Drawer

< Today > Grand Key Club No Filter Multi-Select Off

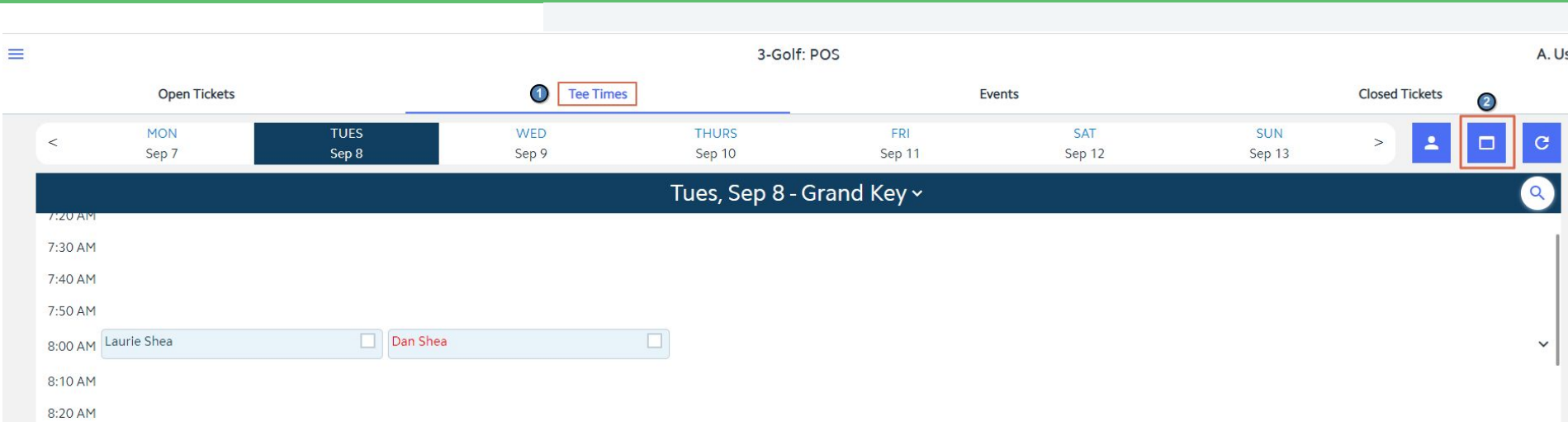
1 2 Show Admin Dashboard Refresh

Time	Description	Golfers	Paid
------	-------------	---------	------

Navigate to a Golf POS in Classic

1. Tee Times Tab
2. Show Admin Dashboard

Navigating to The Admin Tee sheet in Mobile POS



Log Into a Golf relate POS device

1. Tee times tab
2. Admin dashboard Icon

This will open a new tab that is very similar in appearance and function to the website view of the Admin Dashboard

Building a Tee Time in Classic POS

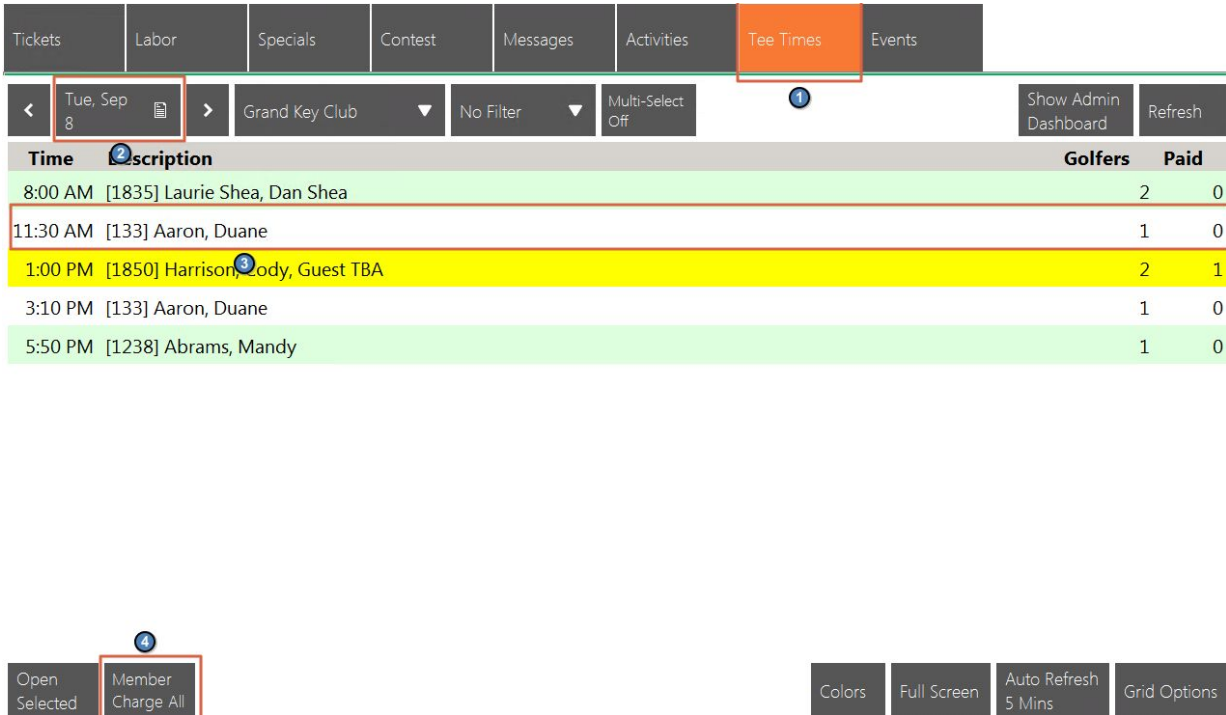
The screenshot displays the Classic POS interface. At the top, there's a navigation bar with a date selector (Tue, Sep 8), a club selector (Grand Key Club), a filter selector (No Filter), and a multi-select option (Multi-Select Off). A 'Hide Admin Dashboard' button is located in the top right corner. Below the navigation bar is a calendar view showing time slots from 10:30 AM to 11:20 AM. A time slot at 11:30 AM is highlighted, and an edit icon is visible next to it. The 'Edit Tee Time' modal window is open, showing the following fields: Date (09/08/2020), Time (11:30 AM), Start Off (1st Tee), Round (Eighteen Holes), Party Size (Single), Send Confirmations (checked), Reserve As A Person (unchecked), Player (Aaron, Duane), and Transportation (4-Bagger). The 'Make Tee Time' button is highlighted in the bottom right corner of the modal.

1. It will change to Hide Admin Dash
2. Click the time block to create a new tee time
3. Or the edit icon to edit it
4. Choose round length
5. Choose transportation option
6. Choose member(s) Guest(s)
7. Save

Note: Building a tee time in Mobile and on the website is identical to these steps other than step 1.

Pulling the Reservation in as a POS Ticket (Classic)

1. Navigate to the Tee Times Tab
2. Select the date of the Tee Time
3. Select the Reservation
4. (Optional) Click Member Charge All to charge every reservation for the current day



The screenshot displays the 'Tee Times' interface. At the top, a navigation bar includes tabs for Tickets, Labor, Specials, Contest, Messages, Activities, Tee Times (highlighted in orange), and Events. Below this, a date selector shows 'Tue, Sep 8' with a calendar icon, a club dropdown for 'Grand Key Club', a filter dropdown for 'No Filter', and a 'Multi-Select Off' button. A table lists tee times with columns for Time, Description, Golfers, and Paid. The 1:00 PM reservation for Harrison, Cody, Guest TBA is highlighted in yellow. At the bottom left, a 'Member Charge All' button is highlighted with a red box and a blue callout '4'. At the bottom right, there are buttons for Colors, Full Screen, Auto Refresh (5 Mins), and Grid Options.

Time	Description	Golfers	Paid
8:00 AM	[1835] Laurie Shea, Dan Shea	2	0
11:30 AM	[133] Aaron, Duane	1	0
1:00 PM	[1850] Harrison, Cody, Guest TBA	2	1
3:10 PM	[133] Aaron, Duane	1	0
5:50 PM	[1238] Abrams, Mandy	1	0

Charging in Classic

Create Ticket

Who is paying? ①

[133] Aaron, Duane

Other Member

Who is '[133] Aaron, Duane' paying for? ②

Select All ③

[133] Aaron, Duane

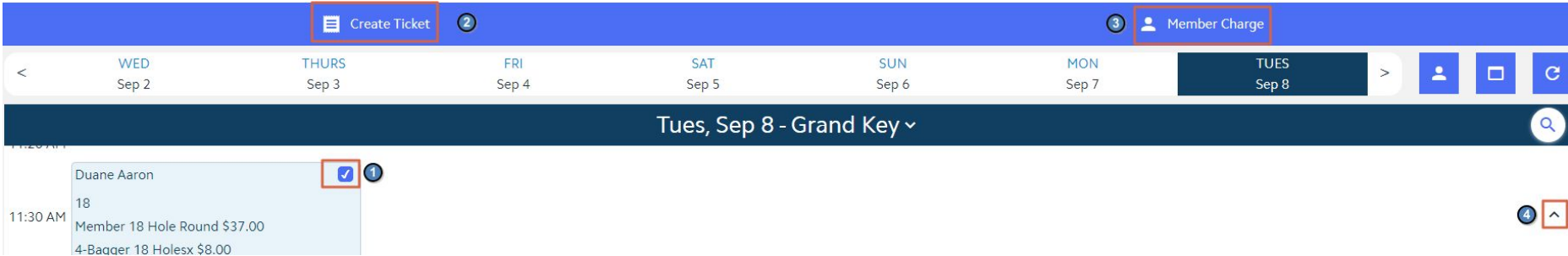
④

OK

Cancel

1. Who is paying (single selection)
2. Who is the selected member paying for
3. If all then this option
4. OK moves to the ticket portion where the ticket is run like normal

Pulling the Reservation in as a POS Ticket (Mobile)



The screenshot displays the Golf Mobile POS interface. At the top, a blue navigation bar contains a 'Create Ticket' button (marked with a circled '2') and a 'Member Charge' button (marked with a circled '3'). Below this is a date selector showing 'TUES Sep 8' (marked with a circled '3'). A dark blue header bar indicates the current date and location: 'Tues, Sep 8 - Grand Key'. A reservation card for 'Duane Aaron' is shown, with a checked checkbox (marked with a circled '1') and a dropdown menu (marked with a circled '4') displaying the following details:

- 11:30 AM
- 18
- Member 18 Hole Round \$37.00
- 4-Baqaer 18 Holesx \$8.00

Navigate to the tee times tab in a Golf Mobile POS device

1. This checkbox triggers the blue bar option set (can be done on multiple tee times)
2. This will build a ticket for each tee time selected and import any fees the club can then run the ticket like normal
3. (Optional) This will Member charge all tee times selected without the need to manually build individual tickets
4. This drop down shows any fees associated with the tee time. These will be the fee defaults that Club Essential added at the club's request



Posting the Charge Batch

The screenshot shows a software interface titled "Approve Charge Batches". It features a "Home" tab and a toolbar with the following icons and labels: New, Edit, Delete, Export, Refresh, Clear Filter, Active, and Post Batch. Below the toolbar is a table with three columns: "Transaction Date", "Batch Control Number", and "Amount". The first row of data contains the values "09/24/2020" and "SJ014131".

Transaction Date	Batch Control Number	Amount
09/24/2020	SJ014131	

Disclaimer: No matter where the ticket comes from it will enter a charge batch for the day it was closed and will need to be posted. Only after this will it show in any reporting in office.



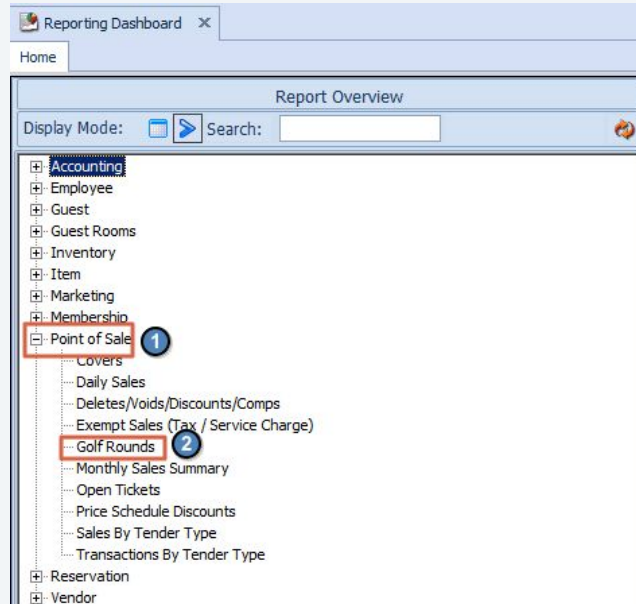
Extrapolate Data

Utilizing Reports in CMA and Reservations

Accessing and Manipulating Reports: OFFICE Interactive Reports

Interactive Reports

1. Point of Sale
2. Golf Rounds



Accessing and Manipulating Reports: OFFICE Interactive Reports

Reporting Dashboard x

Home Golf Rounds x

Report Settings: (Default) Save Current Settings Delete Selected Settings

Start Date: 9/ 8/2020 End Date: 9/ 8/2020

Member Types: (All) Golf Fee Categories: (All)

Days: (All) Golf Fee Types: (All)

Genders: (All) Exclude Guest Member

1 of 1 100%

Clubessential Office: Club at Grand Key

Golf Rounds Report

Member Type: <All>

Gender: <All>

Days: <All>

Date	Guest	Member		Total
	Full Cart	Full Cart	Full Round	
9/8/2020	0	0	2	2
Total	0	0	2	2

9/24/2020 9:14 AM Page 1/1

Lookup Value

Search: Quick Add

Select All Unselect All

	Name	Description	Golf Fee Category Type	Multiplier
<input checked="" type="checkbox"/>	Full Round	Full Round	Round	1.00
<input checked="" type="checkbox"/>	Half Round	Half Round	Round	0.50
<input checked="" type="checkbox"/>	Full Cart	Full Cart	Cart	1.00
<input checked="" type="checkbox"/>	Half Cart	Half Cart	Cart	0.50
<input checked="" type="checkbox"/>	Other	Other	Other	1.00

Lookup Value

Search: Quick Add

Select All Unselect All

	Name	Description
<input checked="" type="checkbox"/>	Member	Member
<input checked="" type="checkbox"/>	Guest	Guest
<input checked="" type="checkbox"/>	Junior	Junior
<input checked="" type="checkbox"/>	Tournament	Tournament
<input checked="" type="checkbox"/>	Comp	Comp
<input checked="" type="checkbox"/>	Outside Tournament	Outside Tournament
<input checked="" type="checkbox"/>	Member Event	Member Event
<input checked="" type="checkbox"/>	PGA	PGA
<input checked="" type="checkbox"/>	School	School
<input checked="" type="checkbox"/>	League	League
<input checked="" type="checkbox"/>	Other	Other

Accessing and Manipulating Reports: OFFICE Data Genie

Data Genie X

Golf Play Detail 1 Layouts Save Save As New Reset Layout Add Filter Add Field Bar Chart Pie Chart Line Chart Options Print Preview Schedule Email Settings

Start Date: 9/ 8/2020 End Date: 9/ 8/2020 2 Load Data Make Layout Public Expand All

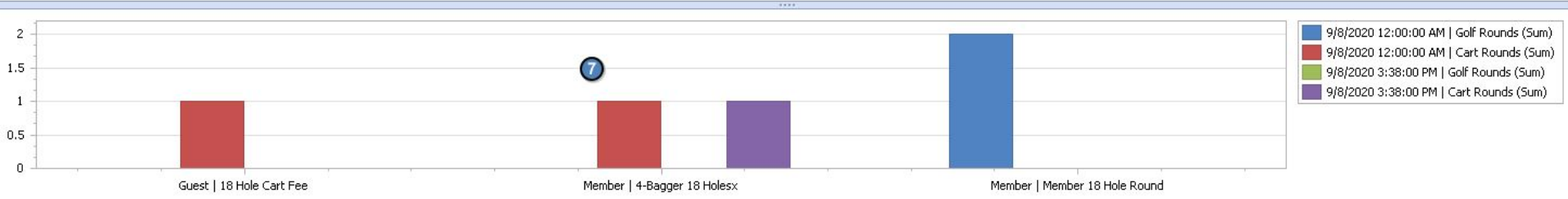
Age Age Demo Billing Member Type Area Area Category 3 Employee Year Month Round Classification Item Category Item Group Round Day Of Week Day of Week Member Type Member

Golf Rounds ... 4 Cart Rounds... Date 6 Billing Member

		9/8/2020 12:00:00 AM		9/8/2020 3:38:00 PM		Grand Total	
Round Type 5 Item		Golf Rounds (Sum)	Cart Rounds (S...	Golf Rounds (Sum)	Cart Rounds (S...	Golf Rounds (Sum)	Cart Rounds (S...
Guest	18 Hole Cart Fee	0.00	1.00	0	0	0.00	1.00
Member	4-Bagger 18 Hol...	0.00	1.00	0.00	1.00	0.00	2.00
	Member 18 Hole...	2.00	0.00	0	0	2.00	0.00
Member Total		2.00	1.00	0.00	1.00	2.00	2.00
Grand Total		2.00	2.00	0.00	1.00	2.00	3.00

- 4. Totaling Options
- 5. Add Row field headers
- 6. Add Column field headers
- 7. Basic graph of highlighted cells.

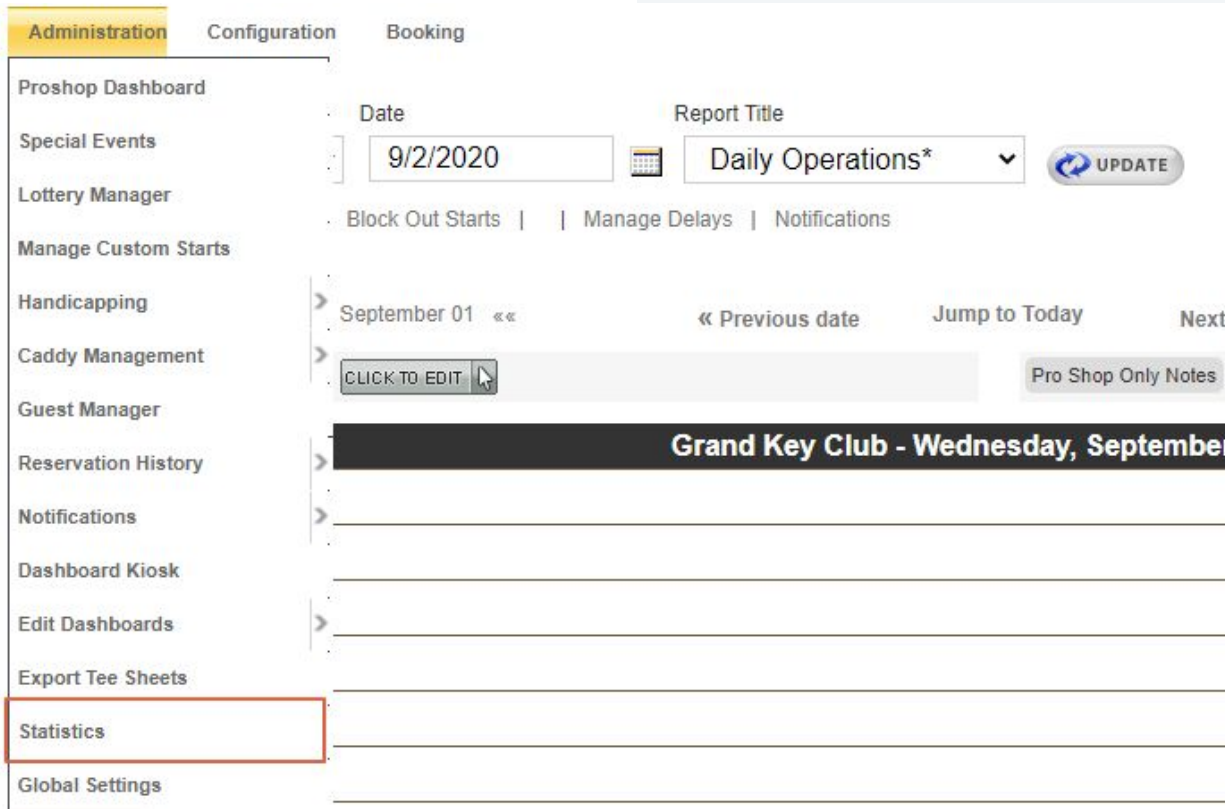
- 1. This report is the Golf Play detail view.
- 2. Choose a date range and click "Load Data"
- 3. Field Headers list



Notes about How to Read these Reports

1. The half/full rounds are based on the multiplier given to it in the type settings.
2. If a new fee default is added to the system any tee time already created will not see that new item when they are brought into the POS ticket therefore will not report in Office (they will need rebuilt).
3. Anytime a tee time based ticket is closed on a different day from the tee time it will report on the day the ticket is closed and batch posted in office.

Navigating to Tee Times Reports



The screenshot displays the Proshop Administration interface. The top navigation bar includes 'Administration', 'Configuration', and 'Booking'. The left sidebar lists various management tools, with 'Statistics' highlighted by a red box. The main content area shows a report configuration for 'Daily Operations*' on '9/2/2020'. Below this, there are navigation options for 'September 01' and a 'CLICK TO EDIT' button. A prominent black banner reads 'Grand Key Club - Wednesday, September'.

In the Admin Dashboard hover over Administration then select Statistics.

Running Reports on the Tee Sheet



Member Rounds By Membership Level



Comparison of member rounds by membership level with summary, monthly, weekly, daily, hourly, and day of the week views. Report filters include course, membership level, gender, status group, date range, time of day, and day of week.



Total Rounds Summary



At a glance view of total rounds, 18 hole rounds, 9 hole rounds, and combined rounds on a course or group of courses. Includes breakout summary for member rounds, guest rounds, and no-shows.

The two reports will allow to view the most detailed information via the Tee Sheet. It can help the club check what the reports in office say and find any discrepancies.

Total Rounds Summary

Total Rounds Summary



Select Course: From: To: [UPDATE](#)

[Export to Excel](#) | [Export to PDF](#)

Grand Key Club

Period	From 9/8/2020 to 9/8/2020	
Total Rounds Played	10	
18 Hole Rounds	10	100%
9 Hole Rounds	0	0%
Combined Rounds	10	
Member Rounds	5	50%
18 Hole Rounds	5	100%
9 Hole Rounds	0	0%
Combined Rounds	5	
by Member Type		
Primary Male 18 Hole Rounds	3	100%
Primary Male 9 Hole Rounds	0	0%
Primary Male Combined Rounds	3	

Primary Female 18 Hole Rounds	2	100%
Primary Female 9 Hole Rounds	0	0%
Primary Female Combined Rounds	2	

<u>by Membership Level</u>		
18 Hole Rounds	5	100%
9 Hole Rounds	0	0%
Combined Rounds	5	

<u>by Gender</u>		
Male 18 Hole Rounds	3	100%
Male 9 Hole Rounds	0	0%
Male Combined Rounds	3	
Female 18 Hole Rounds	2	100%
Female 9 Hole Rounds	0	0%
Female Combined Rounds	2	

<u>by Relationship</u>		
Member 18 Hole Rounds	5	100%
Member 9 Hole Rounds	0	0%
Member Combined Rounds	5	

<u>Guest/TBD Rounds</u>		
18 Hole Rounds	5	100%
9 Hole Rounds	0	0%
Combined Rounds	5	



Member Rounds By Membership Level

Member Rounds By Membership Level

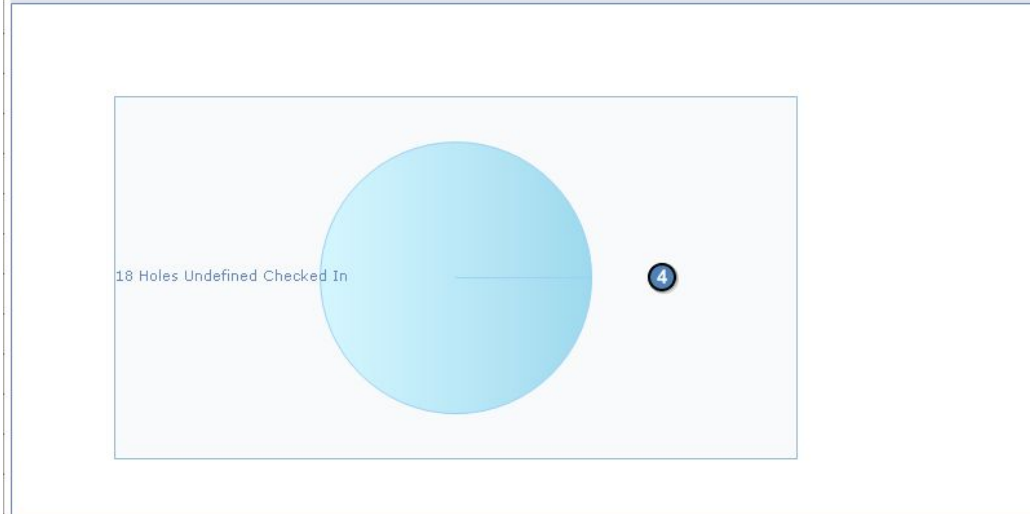


Select Course: **Grand Key Club** From: **9/8/2020** To: **9/8/2020** 1

Select Membership Level: **Mens/Ladies** Earliest: **12:00 AM** Latest: **11:59 PM**

No Filter **No Filter** Booked SU MO Lotto Requests TU WE Event Requests TH FR Cancellations SA

Rounds: **All Rounds** Report: **Summary** 3



[Export to Excel](#) | [Export to PDF](#)

Membership Level	Play Type	Status Type	Rounds
	18 Holes	Checked In	5

1. Date Range
2. Reservation Statuses to Exclude from report
3. What Type of Report
4. A simple pie chart to easily see the various statuses.



Useful Knowledge

[Golf Rounds](#)

[Data Genie](#)

[Mobile Tee Times Check in Settlement](#)

[Reservations Statistics and Reporting](#)

Q&A

