

# Mobile Ordering

March 2020



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# Ask a Question at Any Time!

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 Meet your Host

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Jen Montano  
&  
Justin Brown



## Use Case Scenario / Agenda

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Mobile Ordering empowers your members to quickly and conveniently order food from your Club's Mobile App, for pick-up or delivery (optional) at Club locations.

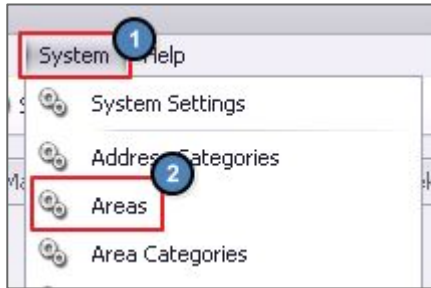
In this webinar, we will discuss:

- Area Set-up
- Menu Creation
- Member Access-Mobile Ordering on the App
- How your club can utilize this feature for Holiday Menus, Catering or To-Go Orders.



# Office Configuration-Enable Area For Mobile Ordering

To Configure Mobile Ordering for an Area, go to **System**, then **Areas**.



**Areas** are used to specifically configure the menus shown in the Mobile Ordering tool.

The purpose of creating a new Area for each location accepting Mobile Orders is to enable the Club to obtain sales demographics, based on all orders coming from the Mobile Ordering Tool.

Select the designated Area to configure your menus.

A screenshot of a software configuration window titled 'Areas'. The 'Clubhouse Dining (Mobile Ordering)' area is selected and highlighted with a red box. To the right, the 'POS Options' section is expanded, and the 'Enable Mobile Ordering' checkbox is checked and highlighted with a red box. Other visible settings include 'Allow Clock In/Out', 'Allow Clock Out with Open Tickets', 'Allow Employees To Change Display Order in POS', 'Default POS to Guest Member', 'Disable Gratuity Button on Settlement', 'Disable Gratuity Prompt with Credit Card', 'Discounts Do Not Change Service Charge', and 'Draw Member Favorites Button'. The 'Area Information' section shows details for 'Clubhouse Dining (Mobile Ordering)'.

**Please Note:** The Mobile Ordering setting must be enabled in POS Options. This step will have been checked during Implementation. To verify this setting is configured, go to POS options, and enable (check) the Mobile Ordering setting.

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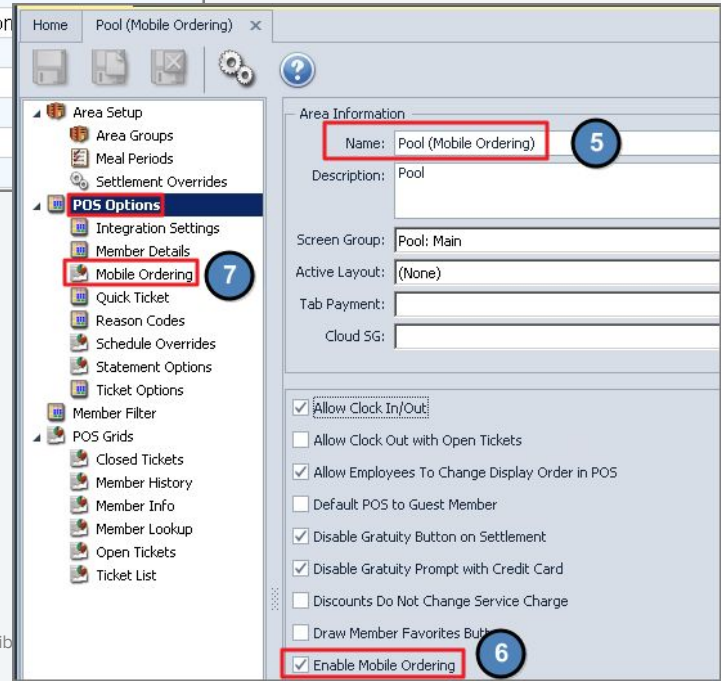
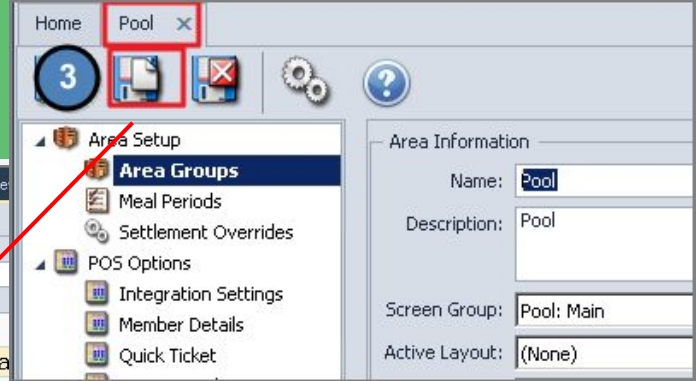
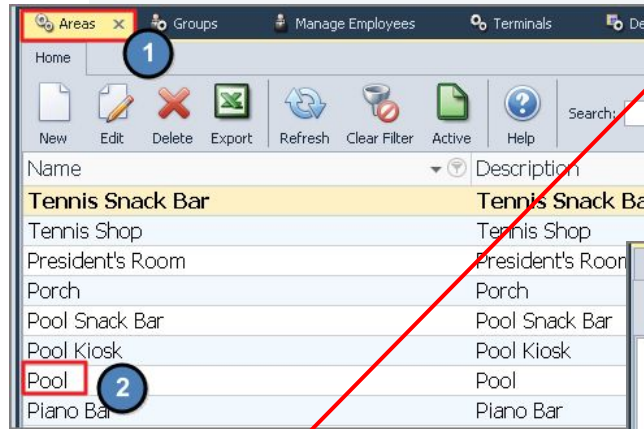
# ↳ Create a New Area-Save and New

To create a **New Area**, go to **Areas**, select the original area and utilize the **Save and New** option to create the new Mobile Ordering Area.

This method reduces the amount of steps and provides the options to carry over important settings from the original area.

Provide a **Name** for the new Mobile Ordering area.

Don't forget to enable **Mobile Ordering** Under POS Options, this will add a new section for **Mobile Ordering**.



# Area Permissions-Step 1

When a new Area is created, the Area must be enabled in that Admin's Employee record, before the admin can grant access to other employees who will need access to the Area.

1. Go to the **Employee** Module.
2. Open the Employee Record (who created the Area).
3. Navigate to the **Security Tab** and go to **Areas**.
4. Place a **check** next to the newly created Mobile Area.
5. **Save and Close** the Employee Record.

The screenshot shows the 'Manage Employees' interface. The 'User, Administrative' record is selected. The 'Security' tab is active, and the 'Areas' sub-tab is selected in the left-hand navigation pane. The 'Employee Information' section shows the user's details: First: Administrative, Middle: (empty), Last: User, Email: (empty), Phone: (empty), and Salaried Employee: . Below this is a table of areas with a legend for 'Inherited from group' (blue) and 'Insufficient permission' (grey). The table lists various areas, with 'Pool (Mobile Ordering)' highlighted in blue and circled with a red box and a blue '4'.

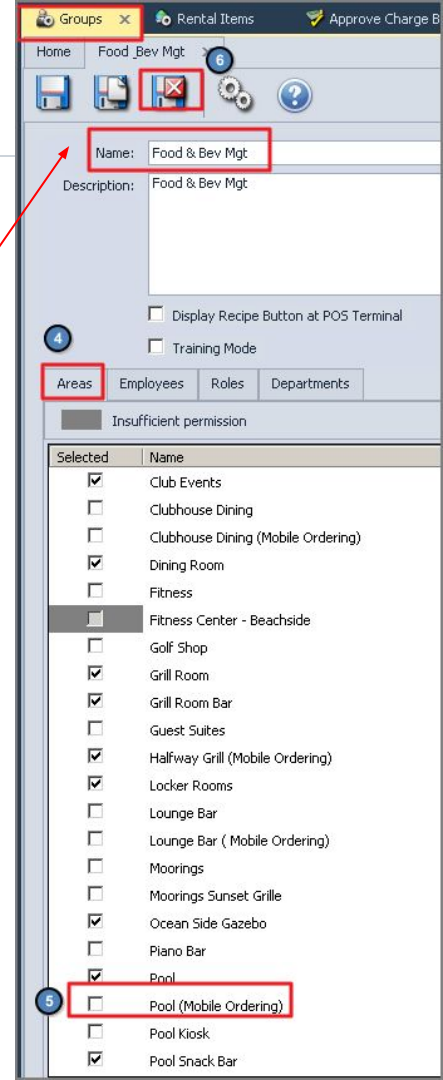
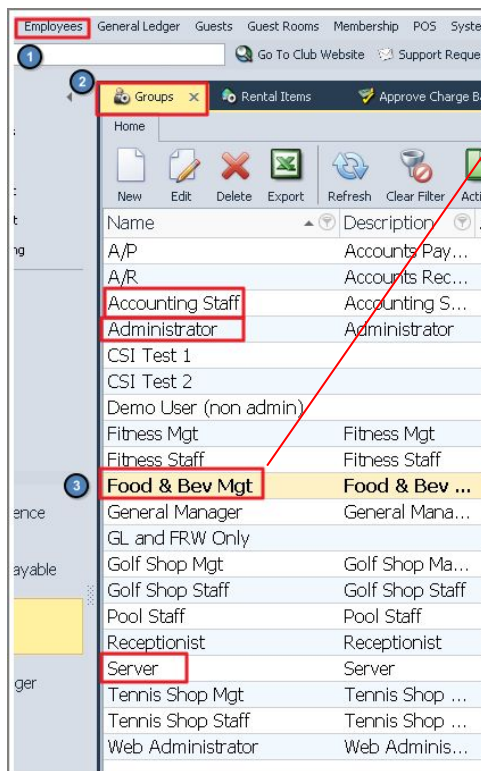
Selected	Name	Description
<input type="checkbox"/>	Fitness Center - Beachside	Fitness Center - Beachside
<input checked="" type="checkbox"/>	Golf Shop	Golf Shop
<input checked="" type="checkbox"/>	Grill Room	Grill Room
<input checked="" type="checkbox"/>	Grill Room Bar	Grill Room Bar
<input checked="" type="checkbox"/>	Guest Suites	Guest Suites
<input checked="" type="checkbox"/>	Halfway Grill (Mobile Ordering)	Halfway Grill (Mobile Ordering)
<input checked="" type="checkbox"/>	Locker Rooms	Locker Rooms
<input checked="" type="checkbox"/>	Lounge Bar	Lounge Bar
<input checked="" type="checkbox"/>	Lounge Bar ( Mobile Ordering)	Lounge Bar
<input checked="" type="checkbox"/>	Moorings	Moorings Sample POS
<input checked="" type="checkbox"/>	Moorings Sunset Grille	Moorings Sunset Grille
<input checked="" type="checkbox"/>	Ocean Side Gazebo	Ocean Side Gazebo
<input checked="" type="checkbox"/>	Piano Bar	Piano Bar
<input checked="" type="checkbox"/>	Pool	Pool
<input type="checkbox"/>	Pool (Mobile Ordering)	Pool
<input checked="" type="checkbox"/>	Pool Kiosk	Pool Kiosk
<input checked="" type="checkbox"/>	Pool Snack Bar	Pool Snack Bar



# Area Security Permissions-Employee Groups

To assign **Area Security Permissions** to An **Employee Group**:

1. Go to **Employees** across the top.
2. Select **Groups**.
3. Select any applicable F&B Group, Server, Admin or Accounting Group.
4. Under the **Areas** tab, place a check next to the new Mobile Ordering Area.
5. **Save and Close**.

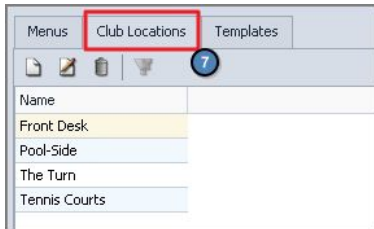




# Area Set Up-Mobile Ordering

On the **Mobile Ordering** tab, configure the following settings.

1. **Name**
2. **Pick Up Interval**
  - a. **Orders Per Interval**
3. **Server Employee**
4. **Terminal Device**
5. **Admin Notification Email**
6. **Allow Carry Out**
7. **Allow Delivery to Club Location**
8. **Allow Gratuity on Checkout**
9. **Allow Message on Checkout**
10. **Allow Cover on Checkout**



Home Clubhouse Dining (Mobile Ordering) x

Area Setup

- Area Groups
- Meal Periods
- Settlement Overrides
- POS Options
  - Integration Settings
  - Member Details
  - Mobile Ordering**
  - Quick Ticket
  - Reason Codes
  - Schedule Overrides
  - Ticket Options
- Member Filter
- POS Grids
  - Closed Tickets
  - Member History
  - Member Info
  - Member Lookup
  - Open Tickets
  - Ticket List

Area Information

Name: Clubhouse Dining (Mobile Ordering) POS Type:  FnB  Retail

Description: Clubhouse Dining (Mobile Ordering) Department: Food & Beverage

Screen Group: Gazebo Dining Mobile Area Category: Food & Beverage

Active Layout: Grill Manager: (None)

Tab Payment: Credit Card-F&B Display Order: 7

Cloud SG: Gazebo Dining Mobile Cloud Quick CC: Mobile POS CC

Name: Clubhouse Dining 1

Pick Up Interval: 5 Minutes 2

Allow up to 5 orders per interval (0 - unlimited)

Server Employee: Administrative User 3

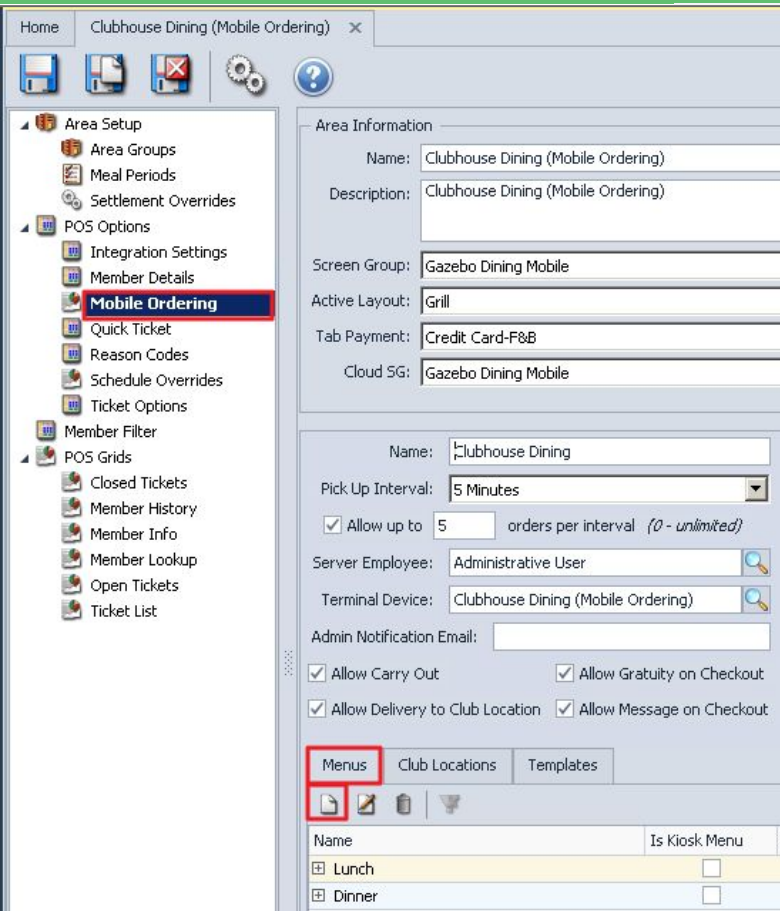
Terminal Device: Clubhouse Dining (Mobile Ordering) 4

Admin Notification Email: 5

Allow Carry Out 6  Allow Gratuity on Checkout 8  Allow Cover on Checkout 10

Allow Delivery to Club Location 7  Allow Message on Checkout 9

# Add a Menu



Home Clubhouse Dining (Mobile Ordering) x

Area Setup

- Area Groups
- Meal Periods
- Settlement Overrides
- POS Options
  - Integration Settings
  - Member Details
  - Mobile Ordering**
  - Quick Ticket
  - Reason Codes
  - Schedule Overrides
  - Ticket Options
- Member Filter
- POS Grids
  - Closed Tickets
  - Member History
  - Member Info
  - Member Lookup
  - Open Tickets
  - Ticket List

Area Information

Name: Clubhouse Dining (Mobile Ordering)

Description: Clubhouse Dining (Mobile Ordering)

Screen Group: Gazebo Dining Mobile

Active Layout: Grill

Tab Payment: Credit Card-F&B

Cloud SG: Gazebo Dining Mobile

Name: Clubhouse Dining

Pick Up Interval: 5 Minutes

Allow up to 5 orders per interval (0 - unlimited)

Server Employee: Administrative User

Terminal Device: Clubhouse Dining (Mobile Ordering)

Admin Notification Email:

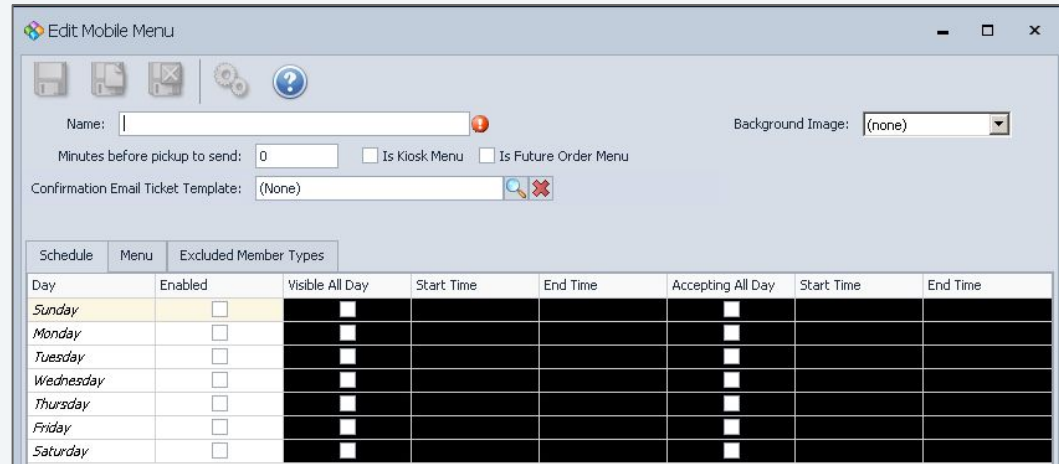
Allow Carry Out  Allow Gratuity on Checkout

Allow Delivery to Club Location  Allow Message on Checkout

Menus Club Locations Templates

Name	Is Kiosk Menu
Lunch	<input type="checkbox"/>
Dinner	<input type="checkbox"/>

Now it's time to create the **Menu(s)**. Click the **New** icon and a Menu Configuration screen will appear. Menu examples can be Lunch or Dinner.



Edit Mobile Menu

Name: [ ] Background Image: (none)

Minutes before pickup to send: 0  Is Kiosk Menu  Is Future Order Menu

Confirmation Email Ticket Template: (None)

Schedule	Menu	Excluded Member Types					
Day	Enabled	Visible All Day	Start Time	End Time	Accepting All Day	Start Time	End Time
Sunday	<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>		
Monday	<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>		
Tuesday	<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>		
Wednesday	<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>		
Thursday	<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>		
Friday	<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>		
Saturday	<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>		

## Complete the Menu Screen






1. Name
2. Minutes before pickup to send
3. Is Kiosk Menu




Checking this setting will remove this menu visibility from the mobile app and this menu will only be available on Mobile Ordering kiosk devices.





**Edit Mobile Menu**

1 Name:

2 Minutes before pickup to send:  3  Is Kiosk Menu 4  Is Future Order Menu 6 Background Image: 

Confirmation Email Ticket Template:    5

Schedule	Menu	Excluded Member Types				
Day	Enabled	Visible All Day	Start Time	End Time	Accepting All Day	Start Time
Sunday	<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>	
Monday	<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>	
Tuesday	<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>	
Wednesday	<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>	
Thursday	<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>	
Friday	<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>	
Saturday	<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>	

## 4. Is Future Order Menu

The screenshot shows the 'Edit Mobile Menu' interface. At the top, there are icons for save, print, delete, settings, and help. Below these are several configuration fields:

- 1 Name: [Text Input]
- 2 Minutes before pickup to send: [0] [Input]
- 3  Is Kiosk Menu
- 4  Is Future Order Menu
- 6 Background Image: [(none) Dropdown]
- Confirmation Email Ticket Template: [(None) Dropdown]

Below the configuration fields is a table with columns: Schedule, Menu, Excluded Member Types, Day, Enabled, Visible All Day, Start Time, End Time, Accepting All Day, Start Time, End Time.

Schedule	Menu	Excluded Member Types	Day	Enabled	Visible All Day	Start Time	End Time	Accepting All Day	Start Time	End Time
			Sunday	<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>		
			Monday	<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>		
			Tuesday	<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>		
			Wednesday	<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>		
			Thursday	<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>		
			Friday	<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>		
			Saturday	<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>		

At the bottom, there is a zoomed-in view of the configuration fields:

- Minutes before pickup to send: [0] [Input]
- Future order hours to prep: [24] [Input]
- Is Kiosk Menu
- Is Future Order Menu
- Confirmation Email Ticket Template: [Mobile Ordering Confirmation] [Dropdown]

Future Ordering Menus can now be configured to automatically print with a **Minutes Before Pickup to Send** Setting.

Users will now see two options when a menu is configured to be Is Future Order Menu:

- 1) **Minutes Before Pickup to Send**
- 2) **Future Order Hours to Prep.**

## 5. Confirmation Email Ticket Template

## 6. Background Image



Edit Mobile Menu

1 Name:  2 Minutes before pickup to send:  3  Is Kiosk Menu 4  Is Future Order Menu

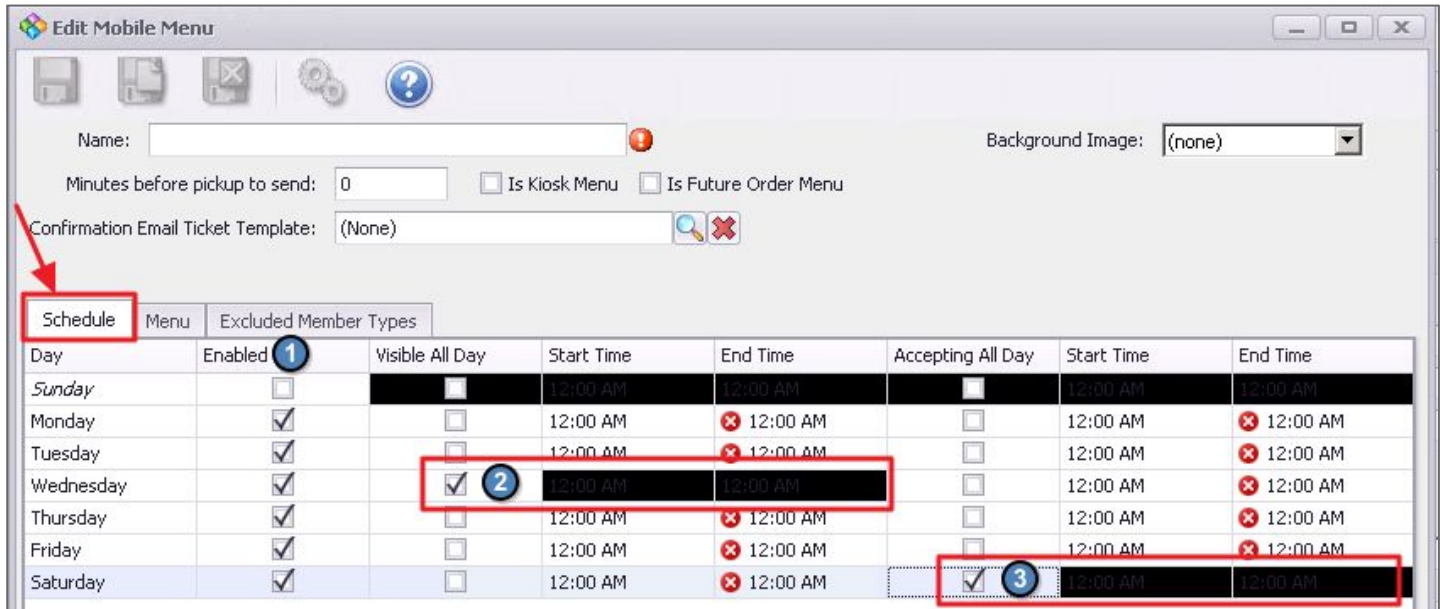
6 Background Image:

Confirmation Email Ticket Template:  5

Schedule	Menu	Excluded Member Types	Day	Enabled	Visible All Day	Start Time	End Time	Accepting All Day	Start Time	End Time
			Sunday	<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>		
			Monday	<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>		
			Tuesday	<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>		
			Wednesday	<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>		
			Thursday	<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>		
			Friday	<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>		
			Saturday	<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>		

1. Enabled
2. Visible All Day\*
3. Accepting All Day\*

*\*This will disable the Start/End time for that specific day*



The screenshot shows the 'Edit Mobile Menu' window with a table of menu items. The table has the following columns: Day, Enabled, Visible All Day, Start Time, End Time, and Accepting All Day. The rows represent the days of the week. Red boxes and numbers 1, 2, and 3 highlight the 'Enabled', 'Visible All Day', and 'Accepting All Day' checkboxes for Sunday, Wednesday, and Saturday respectively.

Day	Enabled	Visible All Day	Start Time	End Time	Accepting All Day	Start Time	End Time
Sunday	<input type="checkbox"/>	<input checked="" type="checkbox"/>	12:00 AM	12:00 AM	<input type="checkbox"/>	12:00 AM	12:00 AM
Monday	<input checked="" type="checkbox"/>	<input type="checkbox"/>	12:00 AM	✗ 12:00 AM	<input type="checkbox"/>	12:00 AM	✗ 12:00 AM
Tuesday	<input checked="" type="checkbox"/>	<input type="checkbox"/>	12:00 AM	✗ 12:00 AM	<input type="checkbox"/>	12:00 AM	✗ 12:00 AM
Wednesday	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	12:00 AM	12:00 AM	<input type="checkbox"/>	12:00 AM	✗ 12:00 AM
Thursday	<input checked="" type="checkbox"/>	<input type="checkbox"/>	12:00 AM	✗ 12:00 AM	<input type="checkbox"/>	12:00 AM	✗ 12:00 AM
Friday	<input checked="" type="checkbox"/>	<input type="checkbox"/>	12:00 AM	✗ 12:00 AM	<input type="checkbox"/>	12:00 AM	✗ 12:00 AM
Saturday	<input checked="" type="checkbox"/>	<input type="checkbox"/>	12:00 AM	✗ 12:00 AM	<input checked="" type="checkbox"/>	12:00 AM	12:00 AM

## Future Order Menu -Accepting Orders and Visibility

### Ability to Define “Visible” or “Accepting” Only Days

- Users will now have the following 3 options for both **Visibility** and **Accepting** within the "Edit Mobile Menu" Grid:
  - None
  - Timed
  - All Day
- This will allow Clubs to make a menu visible and allow future orders for a given day without accepting orders for that same day and vice versa.

The screenshot shows the 'Edit Mobile Menu' interface for 'Halfway House'. It includes fields for 'Name', 'Minutes before pickup to send', 'Is Kiosk Menu', 'Is Future Order Menu', 'Future order hours to prep', and 'Confirmation Email Ticket Template'. Below these is a table with columns: Schedule, Menu, Excluded Member Types, Day, Enabled, Visible Type, Start Time, End Time, Accepting Type, Start Time, and End Time. The 'Visible Type' and 'Accepting Type' columns are highlighted with red boxes, and red arrows point from these boxes to a callout box.

Day	Enabled	Visible Type	Start Time	End Time	Accepting Type	Start Time	End Time
Sunday	<input checked="" type="checkbox"/>	Timed	8:00 AM	11:00 PM	None		
Monday	<input checked="" type="checkbox"/>	Timed	8:00 AM	11:00 PM	Timed	8:00 AM	11:00 PM
Tuesday	<input checked="" type="checkbox"/>	Timed	8:00 AM	11:00 PM	Timed	8:00 AM	11:00 PM
Wednesday	<input checked="" type="checkbox"/>	Timed	8:00 AM	11:00 PM	Timed	8:00 AM	11:00 PM
Thursday	<input checked="" type="checkbox"/>	Timed	8:00 AM	11:00 PM	Timed	8:00 AM	11:00 PM
Friday	<input checked="" type="checkbox"/>	Timed	8:00 AM	11:00 PM	Timed	8:00 AM	11:00 PM
Saturday	<input checked="" type="checkbox"/>	Timed	8:00 AM	11:00 PM	Timed	8:00 AM	11:00 PM

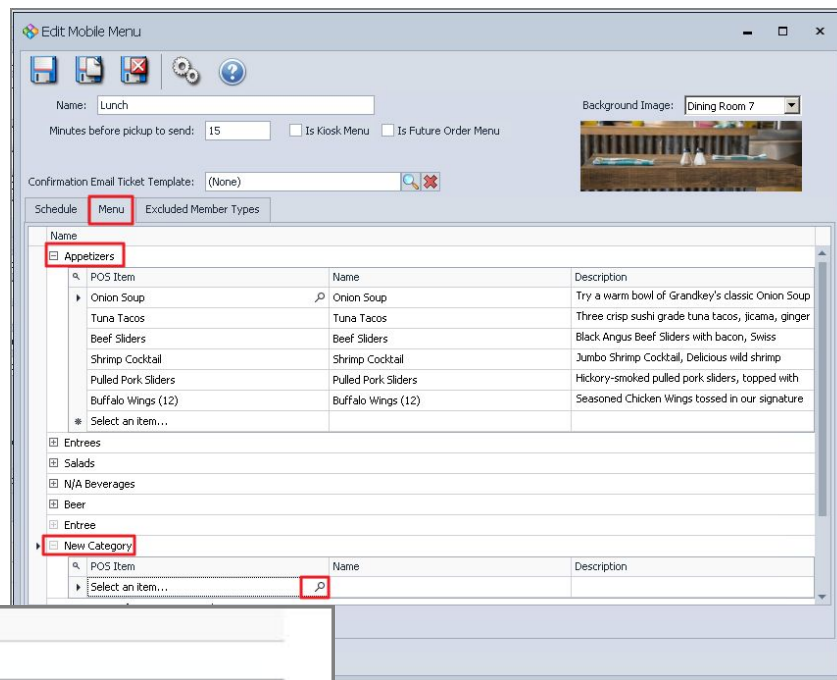
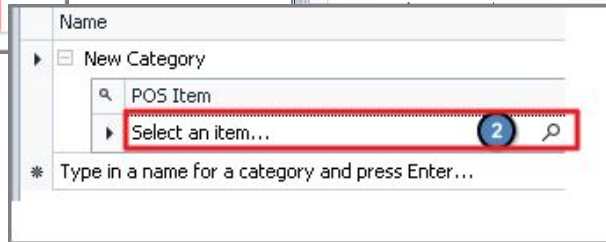
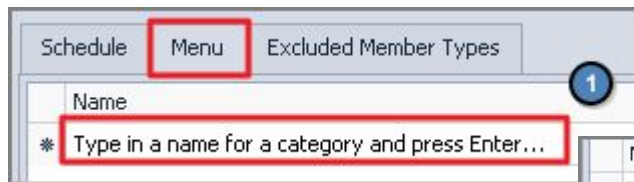
Drop down options are now:  
**All Day**  
**None**  
**Timed**



## Menu-Create Categories and Search Items

Establish the **Categories** such as Appetizers, Salads, Entrees, that will house the Menu Items.

Once the **Category** has been created, search for an Item (from a list of existing items) by clicking the search icon to launch the item selector.



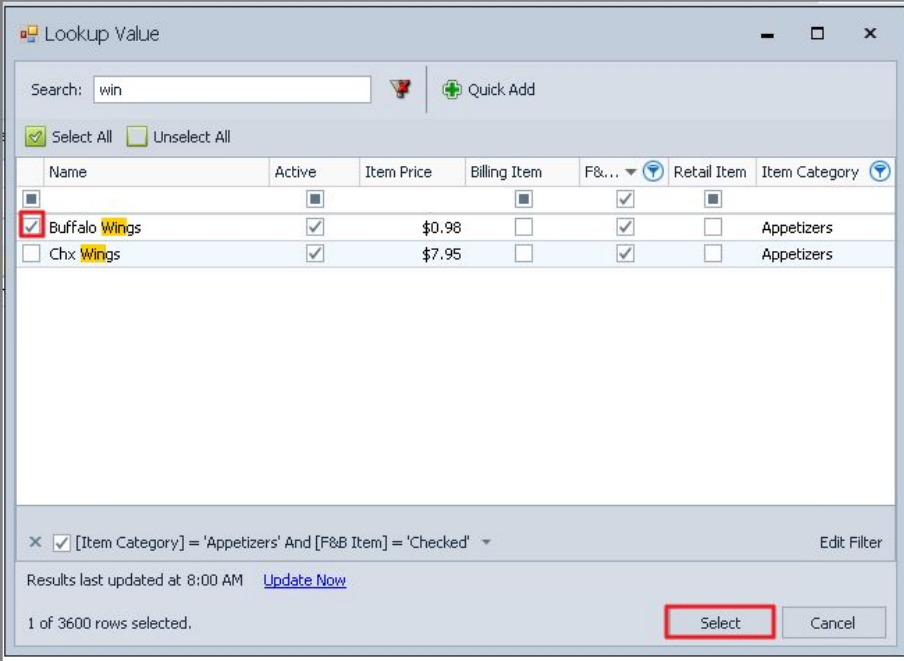
# Menu Search Options

Tips when Searching for an Item:

1. Start by Typing the name of item.
2. To simplify search, limit results to F&B Items, Remove Columns that are not useful and apply Item Category Filter.

The screenshot shows the 'Lookup Value' window with a search bar containing 'win'. Below the search bar are 'Select All' and 'Unselect All' checkboxes. A table displays search results with columns: Name, Active, Item Price, Billing Item, F&B It..., Retail Item, and Item Category. The 'F&B It...' column is highlighted with a red box. A context menu is open over the 'Retail Item' column, with 'Remove This Column' highlighted in red. At the bottom, a filter is applied: '[Item Category] = 'Appetizers''. The status bar shows 'Results last updated at 8:00 AM' and '0 of 3600 rows selected'.

Name	Active	Item Price	Billing Item	F&B It...	Retail Item	Item Category
Buffalo Wings	<input checked="" type="checkbox"/>	\$0.98	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Appetizers
Chx Wings	<input checked="" type="checkbox"/>	\$7.95	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Appetizers
Buffalo Wings (12)	<input checked="" type="checkbox"/>	\$11.95	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	



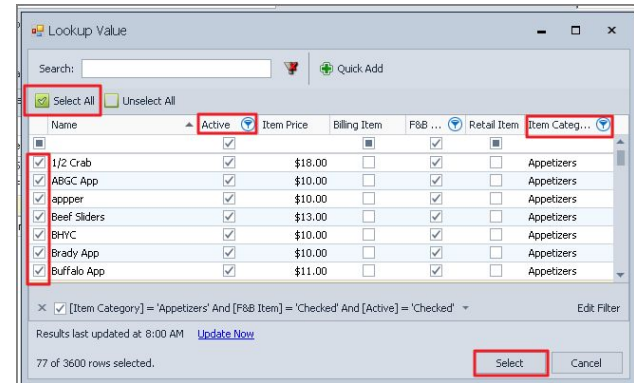
## Select Item

Place a check in the box to select the item.

Click **Select** to add to the Grid. **Optional: Rename the Item and add description for mobile ordering.**

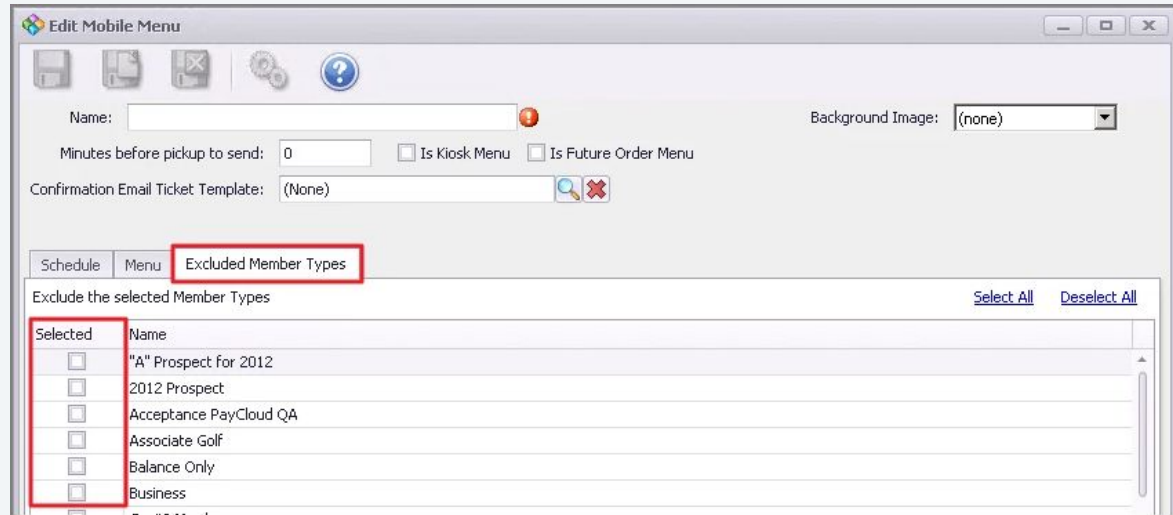
**Multiple Items** can be added at once by selecting the item category, filter by Active Items and then click Select All to add all items at once if appropriate.

Once all items are added, **Save and Close** the Area.



## Excluded Member Type

If you wish to exclude a particular member type from seeing the menu, select the member types on this tab.



## To edit/manage modifiers for Mobile Menu:

1. Go To **Manage Items**.
2. Select the item with modifier.
3. Select **Modifiers**.
4. Click **Override Mobile Ordering Modifier Groups** Option.
5. Create New Modifier Group by clicking Lookup.
6. Select desired Modifier Groups to show.
7. When complete, Modifier Group showing on the right will be for Mobile Ordering only.
8. Save and Close.

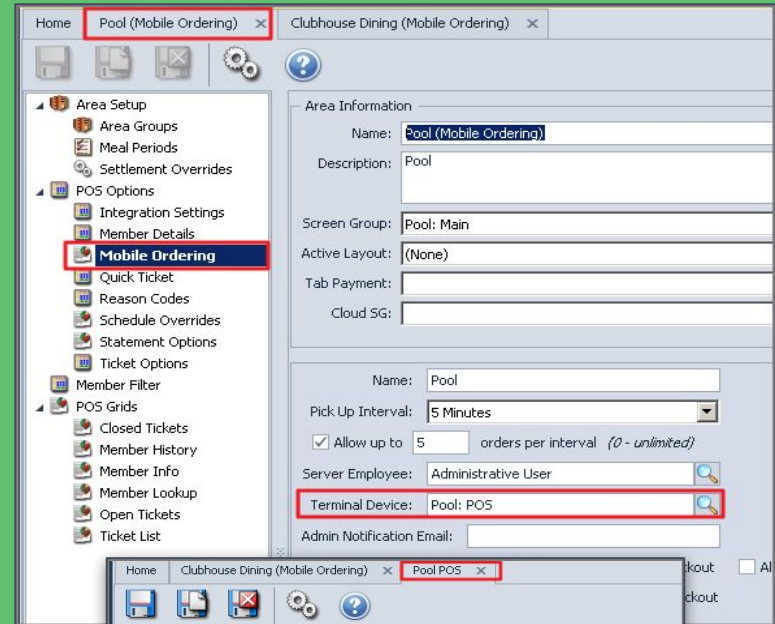
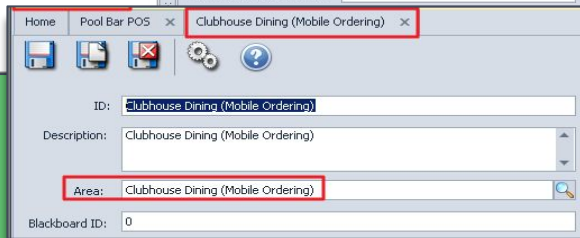
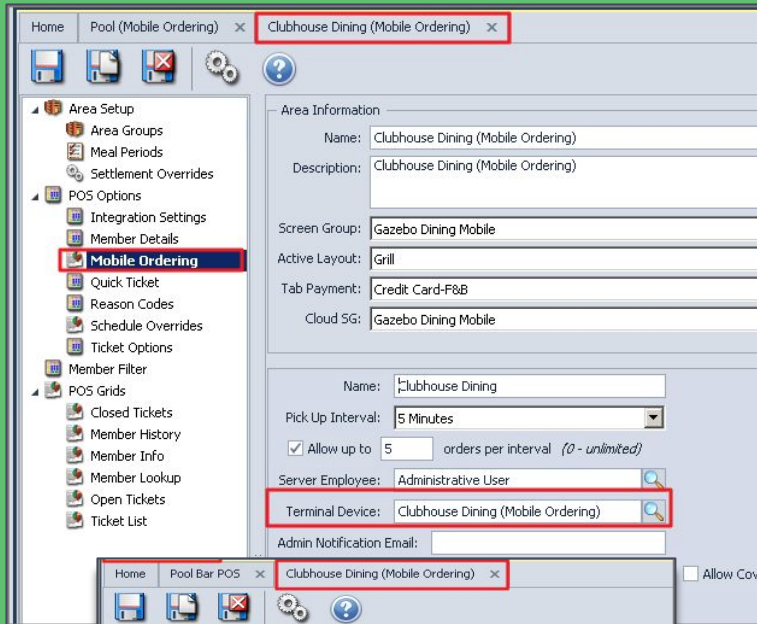
The screenshot displays the 'Manage Items' interface for a 'Burger' item. The left sidebar shows the navigation menu with 'Modifiers' selected. The main area shows item details and various options. A red box highlights the 'Override Mobile Ordering Modifier Groups' checkbox, which is checked. Below this, two windows are shown: the left one lists modifier groups like 'Burger Toppings', 'Cheese', and 'Dinner Sides'; the right one shows a list with 'Temp' selected. Red arrows and numbered circles (1-7) indicate the sequence of actions: 1. Manage Items, 2. Burger item, 3. Modifiers, 4. Override checkbox, 5. Lookup icon, 6. Temp selection, 7. Save/Close button.

# Device Settings



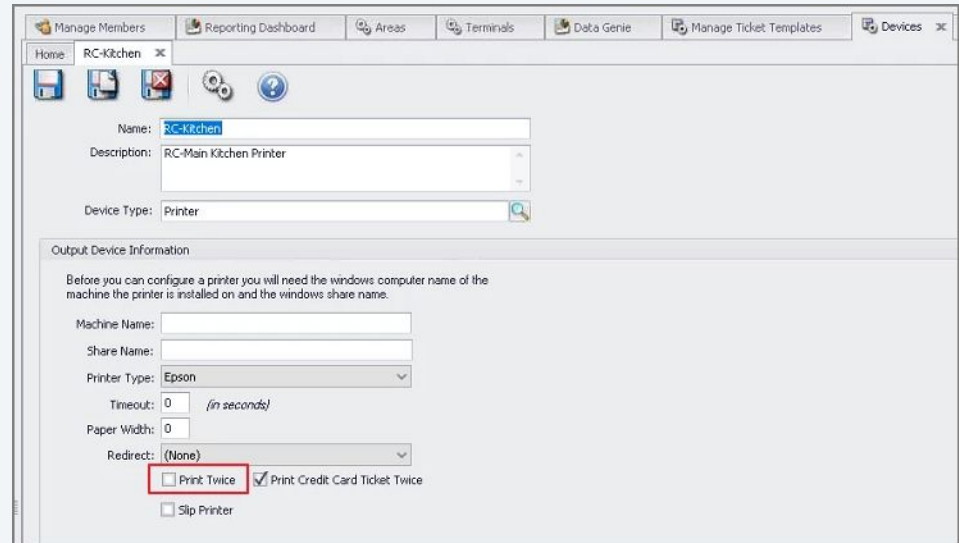
# Terminal Devices

Each Mobile Ordering Area should be assigned to a corresponding Terminal Device, when several Areas exist.



## Ticket Printing (Mobile Ordering)

Printer settings can be enabled to allow tickets to print twice.



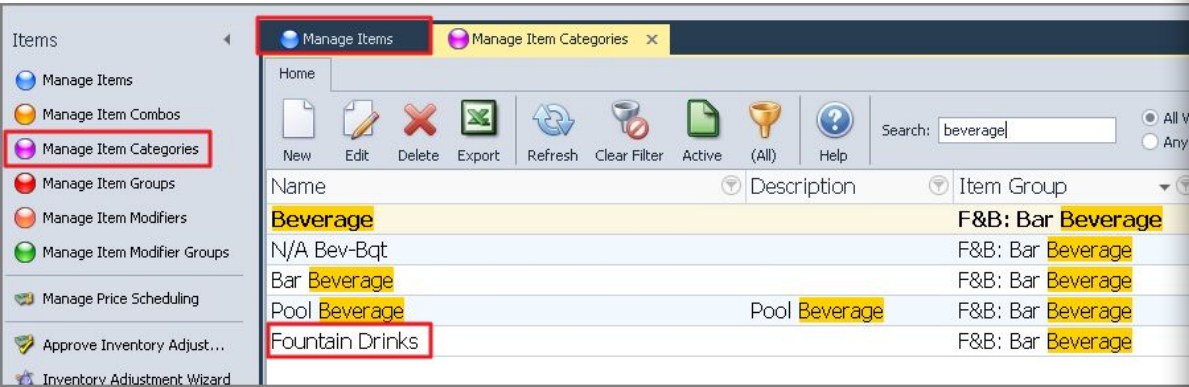


## Item Categories/Non-Alcoholic Beverages

### To access your Item Categories:

1. Navigate to the **Items Module** (Manage Items).
2. Select **Manage Item Categories** (purple dot).
3. Search for commonly named Item Categories such as Beverage, Fountain Drinks, or N/A Beverages.
4. Double Click on the **Item Category** to open.

The **Item Selection** tab will display all the Items in that category.



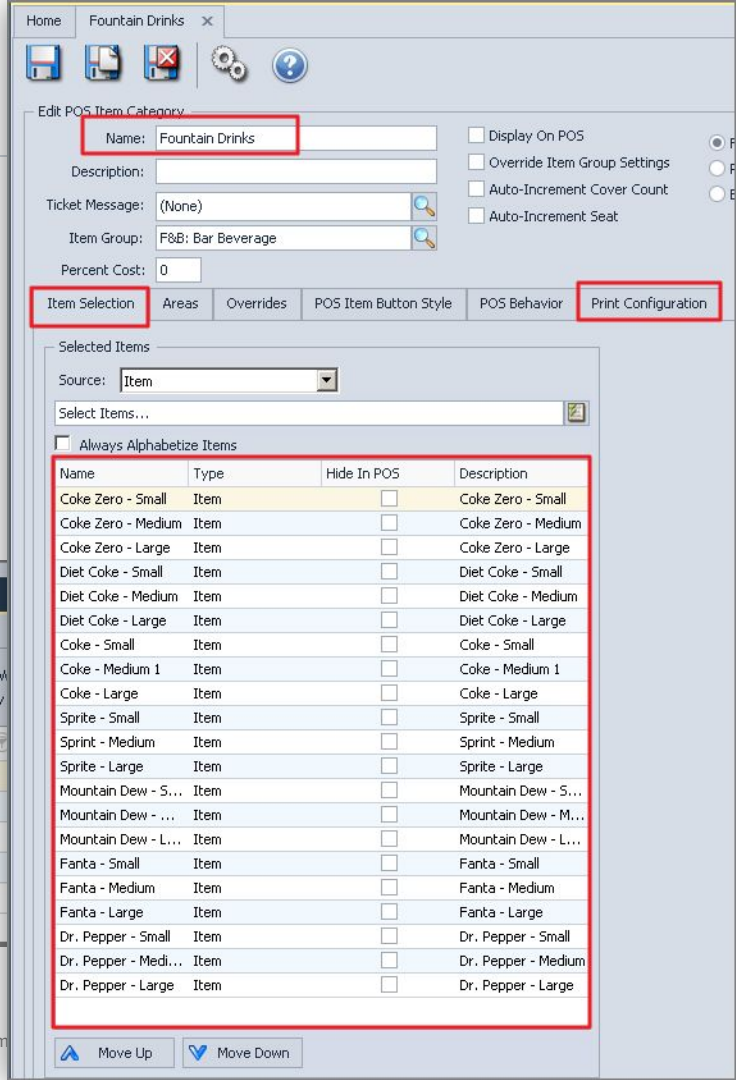
Home

Manage Items Manage Item Categories

New Edit Delete Export Refresh Clear Filter Active (All) Help

Search: beverage

Name	Description	Item Group
Beverage		F&B: Bar Beverage
N/A Bev-Bqt		F&B: Bar Beverage
Bar Beverage		F&B: Bar Beverage
Pool Beverage	Pool Beverage	F&B: Bar Beverage
Fountain Drinks		F&B: Bar Beverage



Home Fountain Drinks

Edit POS Item Category

Name: Fountain Drinks

Description:

Ticket Message: (None)

Item Group: F&B: Bar Beverage

Percent Cost: 0

Display On POS  
Override Item Group Settings  
Auto-Increment Cover Count  
Auto-Increment Seat

Item Selection Areas Overrides POS Item Button Style POS Behavior Print Configuration

Selected Items

Source: Item

Select Items...

Always Alphabetize Items

Name	Type	Hide In POS	Description
Coke Zero - Small	Item	<input type="checkbox"/>	Coke Zero - Small
Coke Zero - Medium	Item	<input type="checkbox"/>	Coke Zero - Medium
Coke Zero - Large	Item	<input type="checkbox"/>	Coke Zero - Large
Diet Coke - Small	Item	<input type="checkbox"/>	Diet Coke - Small
Diet Coke - Medium	Item	<input type="checkbox"/>	Diet Coke - Medium
Diet Coke - Large	Item	<input type="checkbox"/>	Diet Coke - Large
Coke - Small	Item	<input type="checkbox"/>	Coke - Small
Coke - Medium 1	Item	<input type="checkbox"/>	Coke - Medium 1
Coke - Large	Item	<input type="checkbox"/>	Coke - Large
Sprite - Small	Item	<input type="checkbox"/>	Sprite - Small
Sprint - Medium	Item	<input type="checkbox"/>	Sprint - Medium
Sprite - Large	Item	<input type="checkbox"/>	Sprite - Large
Mountain Dew - S...	Item	<input type="checkbox"/>	Mountain Dew - S...
Mountain Dew - ...	Item	<input type="checkbox"/>	Mountain Dew - M...
Mountain Dew - L...	Item	<input type="checkbox"/>	Mountain Dew - L...
Fanta - Small	Item	<input type="checkbox"/>	Fanta - Small
Fanta - Medium	Item	<input type="checkbox"/>	Fanta - Medium
Fanta - Large	Item	<input type="checkbox"/>	Fanta - Large
Dr. Pepper - Small	Item	<input type="checkbox"/>	Dr. Pepper - Small
Dr. Pepper - Medi...	Item	<input type="checkbox"/>	Dr. Pepper - Medium
Dr. Pepper - Large	Item	<input type="checkbox"/>	Dr. Pepper - Large

Move Up Move Down

# Item Category/Print Configuration

Navigate to the **Print Configuration** tab.

Here you will assign **where the Items are coming from** (Area/Select Which Mobile Area) and **where they are going to** (POS Device/ select which POS prep printer).

This is only needed on **Mobile orders** for Beverage Item Categories.

**Start/End Times**-can be left blank or broken down into segments that equal 24 hours.

**Day of Week**-generally left blank.

**Message**-Defaults to Show the Name of the actual item ordered (Coke, Sprite, Fanta).

Home Fountain Drinks x

Edit POS Item Category

Name: Fountain Drinks

Description:

Ticket Message: (None)

Item Group: F&B: Bar Beverage

Percent Cost: 0

Default Course: 0

Display On POS

Override Item Group Settings

Auto-Increment Cover Count

Auto-Increment Seat

FnB Category

Retail Category

Billing Category

Item Selection	Areas	Overrides	POS Item Button Style	POS Behavior	Print Configuration	Start Time	End Time	Day Of W...	Message
I	Area	Clubhouse Dining (Mobile ...	POS Device	Lounge Bar Prep Printer				Any	sNameOnOrder
*									

Item Selection	Areas	Overrides	POS Item Button Style	POS Behavior	Print Configuration	Start Time	End Time	Day Of W...	Message
	Area	Clubhouse Dining (Mobile ...	POS Device	Lounge Bar Prep Printer		8:00 AM	5:00 AM	Any	sNameOnOrder
	Area	Clubhouse Dining (Mobile ...	POS Device	Grill Bar Prep Printer		5:01 PM	7:59 AM	Any	sNameOnOrder

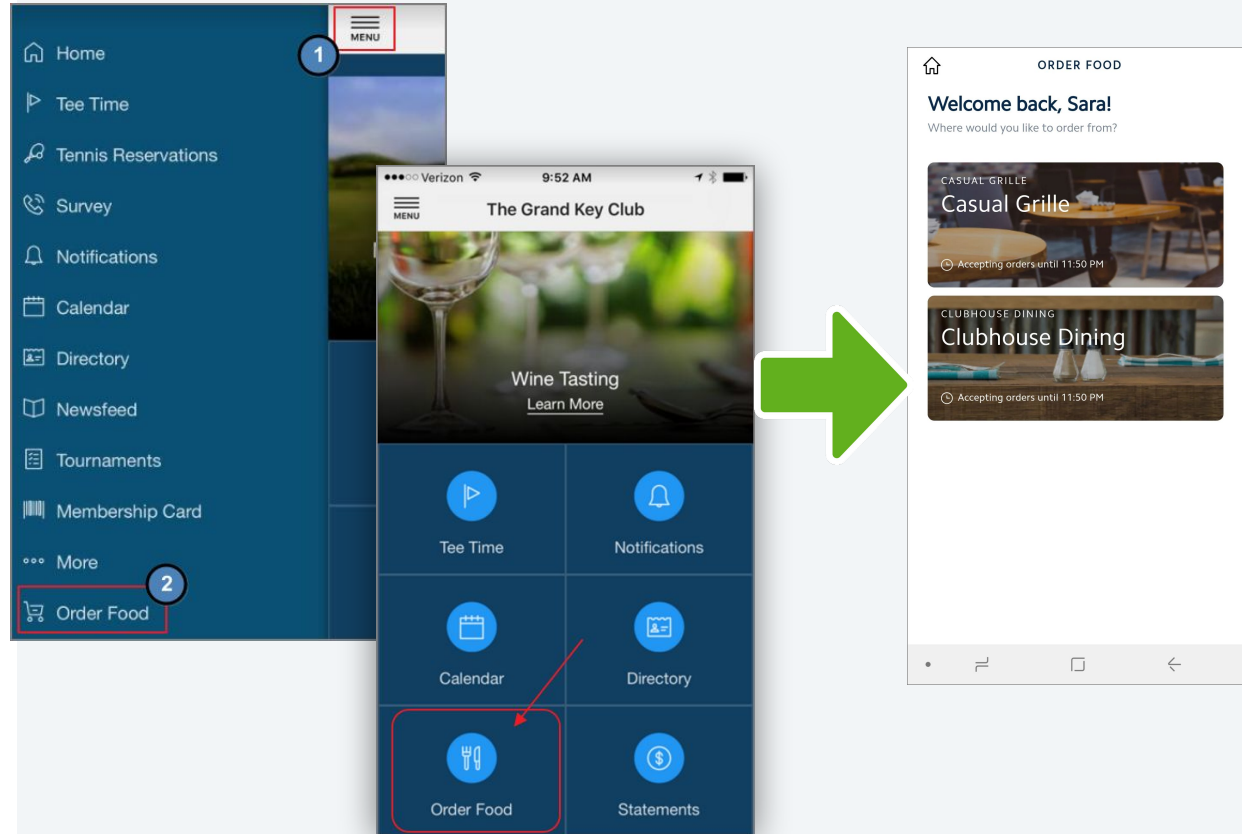


# Member Access

# Mobile Ordering on the App

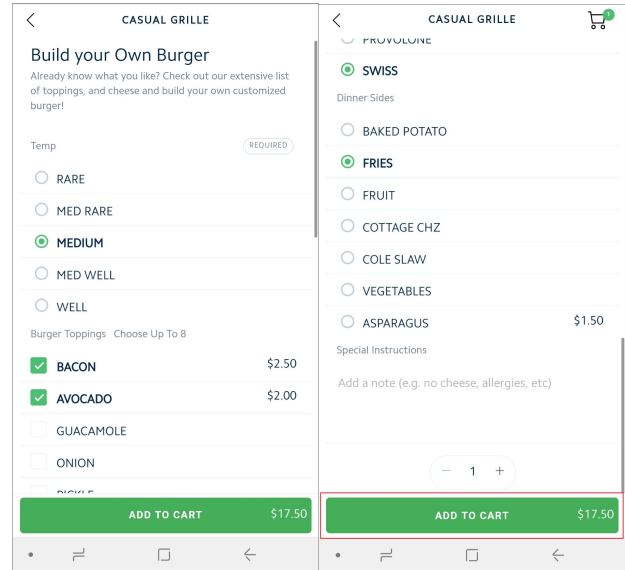
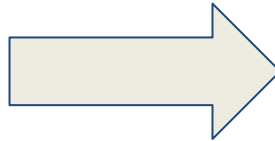
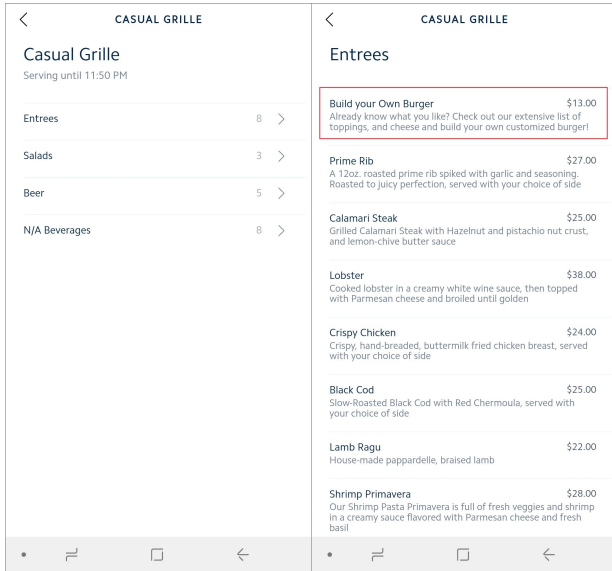
## Two ways to Order:

1. Members can click **Order Food** from the main navigation
2. Click **Menu** and Choose **Order Food**.



# Placing an Order

- Main Screen>Select Menu/Location to Order from.
- Top Level Menu Categories Display.
- Tap Category to see list of items.



- Modifier selections are made.
- Special instructions added.
- Add To Cart.

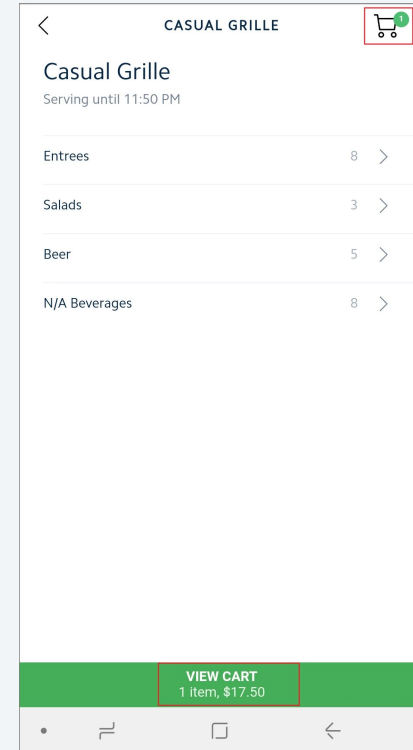
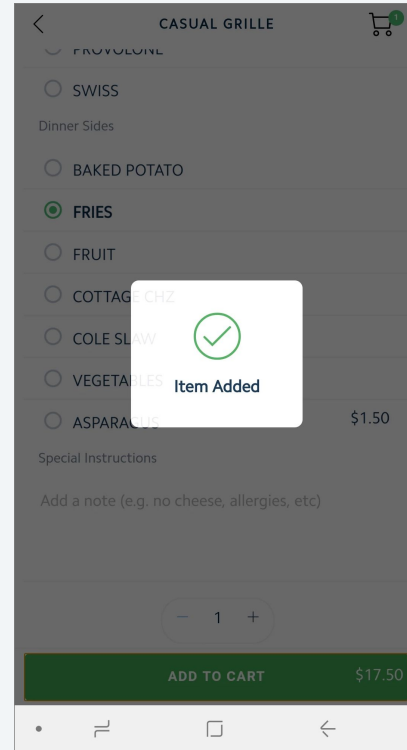
## Order Confirmation

Once the Item has been added to cart, Member will receive a **confirmation** the item was added.

The Screen will return to the **main menu** for additional selections.

The **number of items** in the cart will display in the upper-right hand corner.

Once all items have been selected, member may tap the **Cart icon** or the **View Cart** button to review and finalize order details.

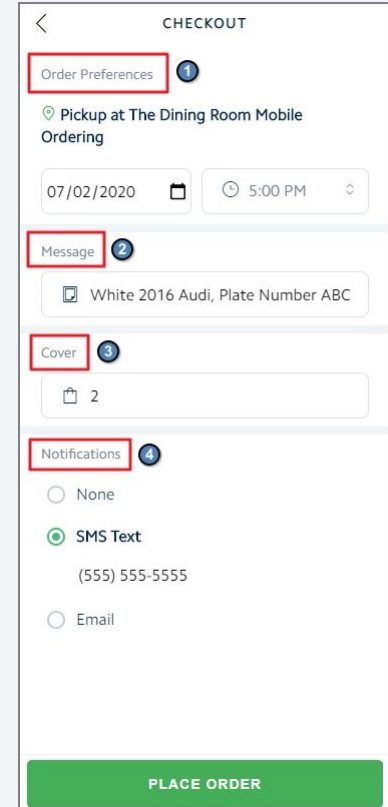
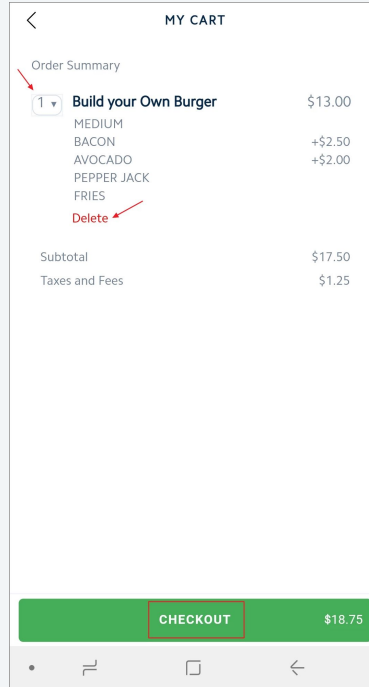


## Checking Out

Tap the **Quantity Box** to edit the quantity of the item.

Tap **Delete** to remove an item from the order.

When order is complete, tap **Checkout** to continue.

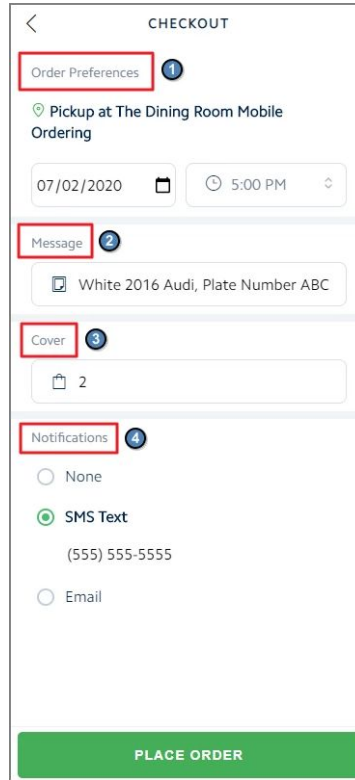




## Order Preferences

(Based on CMA settings)

- Pickup or Delivery (if enabled)
- Date/Time
- Message
- Cover (if enabled)
- Notifications



CHECKOUT

Order Preferences ①

Pickup at The Dining Room Mobile Ordering

07/02/2020 5:00 PM

Message ②

White 2016 Audi, Plate Number ABC

Cover ③

2

Notifications ④

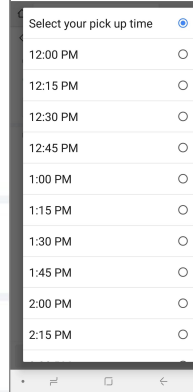
None

SMS Text

(555) 555-5555

Email

PLACE ORDER



Select your pick up time

12:00 PM

12:15 PM

12:30 PM

12:45 PM

1:00 PM

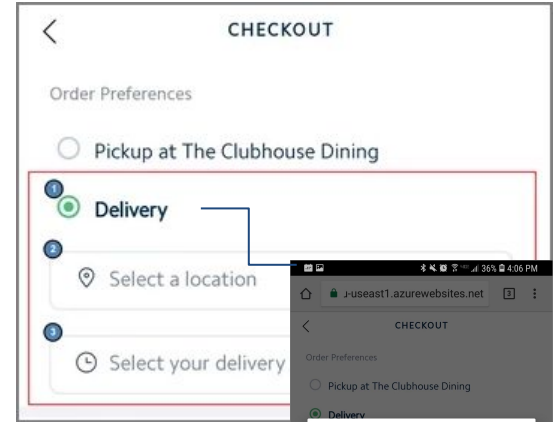
1:15 PM

1:30 PM

1:45 PM

2:00 PM

2:15 PM



CHECKOUT

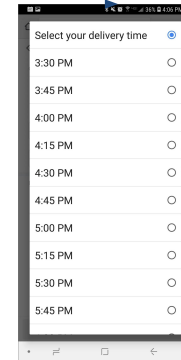
Order Preferences

Pickup at The Clubhouse Dining

① Delivery

② Select a location

③ Select your delivery



Select your delivery time

3:30 PM

3:45 PM

4:00 PM

4:15 PM

4:30 PM

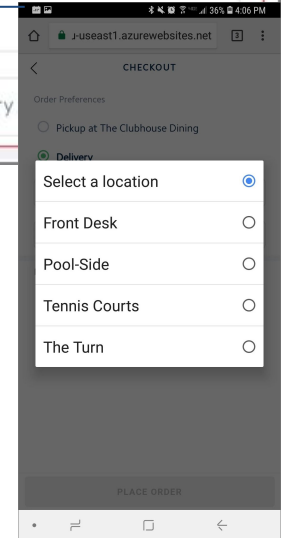
4:45 PM

5:00 PM

5:15 PM

5:30 PM

5:45 PM



CHECKOUT

Order Preferences

Pickup at The Clubhouse Dining

① Delivery

② Select a location

Front Desk

Pool-Side

Tennis Courts

The Turn

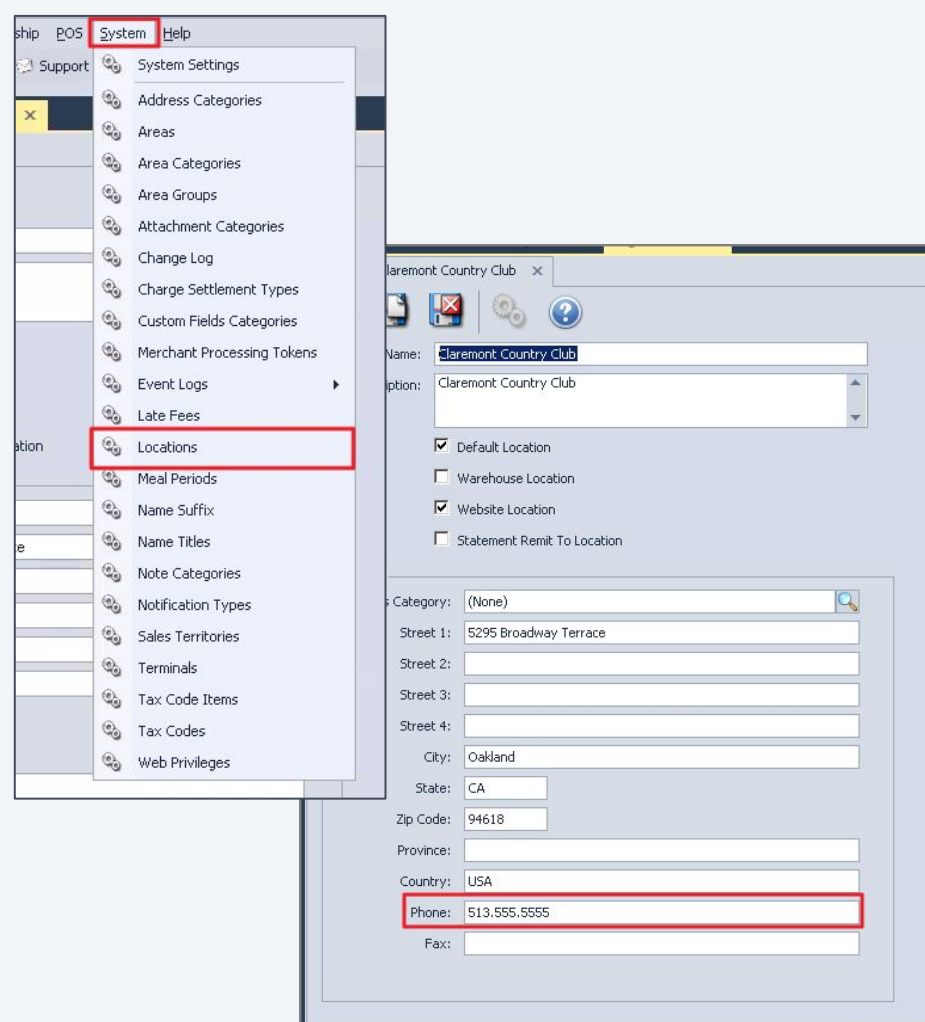
PLACE ORDER

## Location Settings

When using the **Text Option**, a phone number must be configured in your **CMA Location** settings.

To access this, go to **System>Locations>Phone**.

This number will be used to send a text **FROM**.



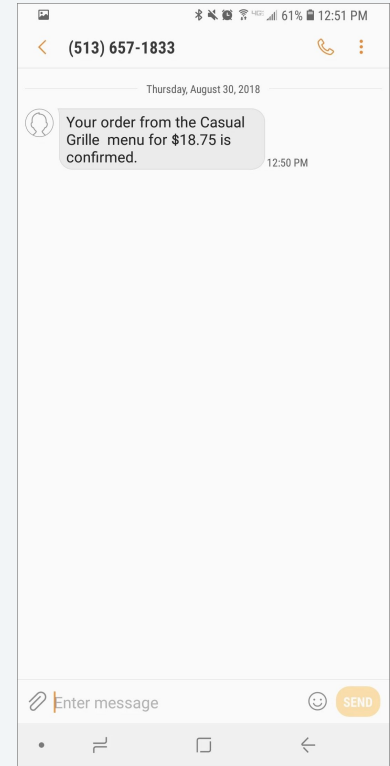
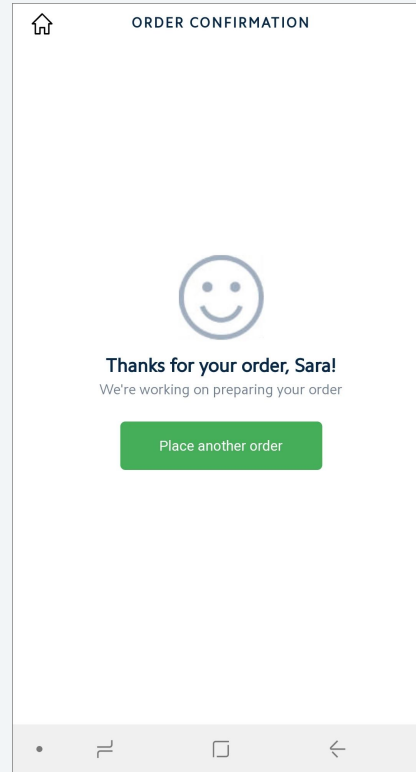
The screenshot displays the Clubessential software interface. On the left, a navigation menu is open, showing the path **System > Locations > Phone**. The **System** menu item is highlighted at the top, and the **Locations** item is highlighted in red. The **Phone** item is also highlighted in red. On the right, the configuration form for a location named "Claremont Country Club" is visible. The form includes fields for Name, Option, and various checkboxes (Default Location, Warehouse Location, Website Location, Statement Remit To Location). Below these are fields for Category, Street 1 through 4, City, State, Zip Code, Province, Country, Phone, and Fax. The **Phone** field is highlighted in red and contains the value "513.555.5555".

## Confirmation Complete

Once the order has been placed, a **Confirmation** on the ordering screen will appear.

An option to **Place another order** will appear.

Member's will also receive a **notification** the order has been received.



# Mobile POS (Terminal Device)

Clubessential Office: Club at Grand Key

## Select Device ▾

🔍 mobile ✕

Clubhouse Dining (Mobile Ordering)

Halfway Grill (Mobile Ordering)

Lounge Bar (Mobile Ordering)

Once the Member completes their order, servers will be able to view the order immediately in [Mobile POS](#).

Clubs may have different terminals based on each Mobile Ordering area. Once logged into Clubhouse Dining Mobile POS>go to Mobile Orders.

Servers will be able to open the ticket and make updates to the order if needed.

\*For additional information on Mobile POS, please visit our [Knowledge Base](#).

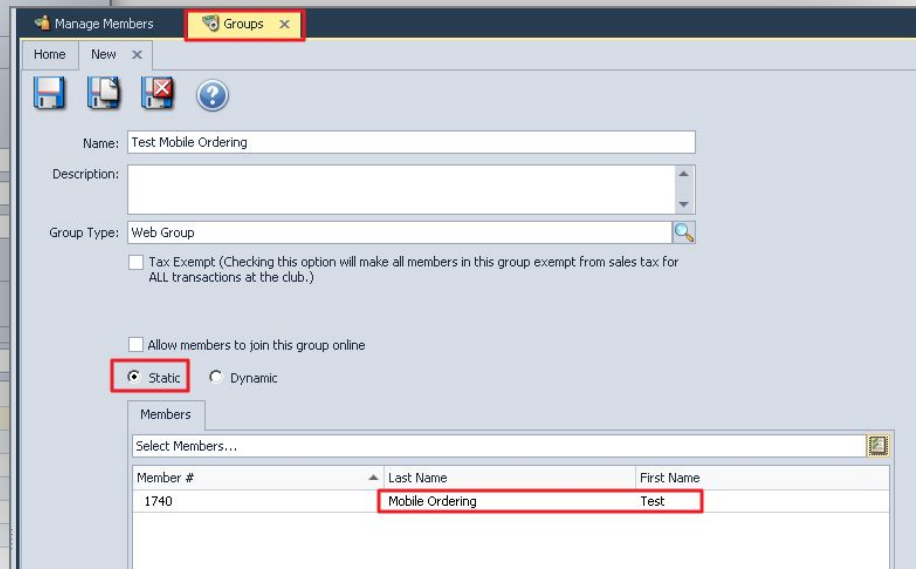
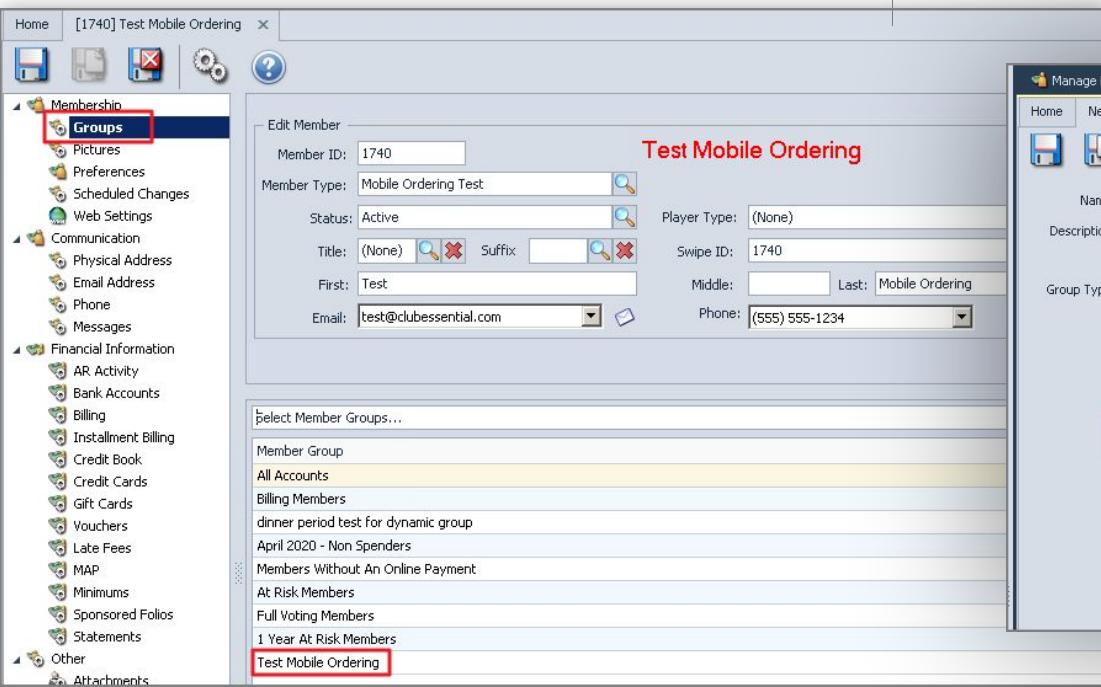
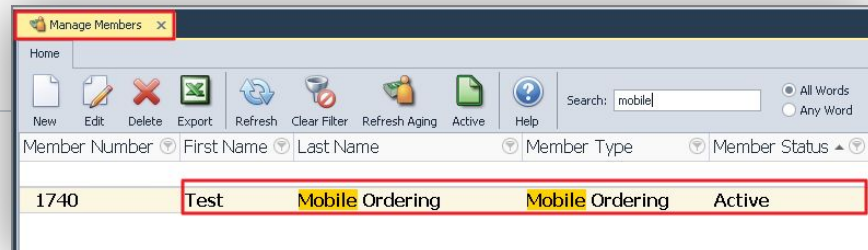
Clubhouse Dining (Mobile Ordering)							A. User
Open Tickets	Mobile Orders			Tee Times	Dining	Events	Closed Tickets
<input type="checkbox"/>	TICKET #	MEMBER #	MEMBER NAME	DELIVERY	TIME		<input type="checkbox"/>
<input type="checkbox"/>	7943	00776-B	Adkins, Megan	Pickup	3:05 PM		<input type="checkbox"/>

# Testing Mobile Ordering

# Mobile Order Test Member & Group

During Setup of Mobile Ordering, Clubessential will create a **Test Member** as well as a **Test Group** specific to Mobile Ordering.

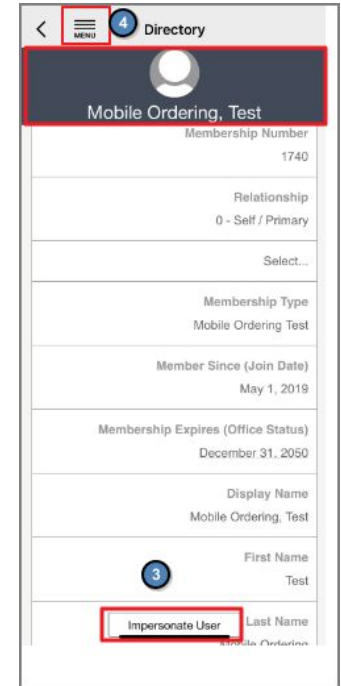
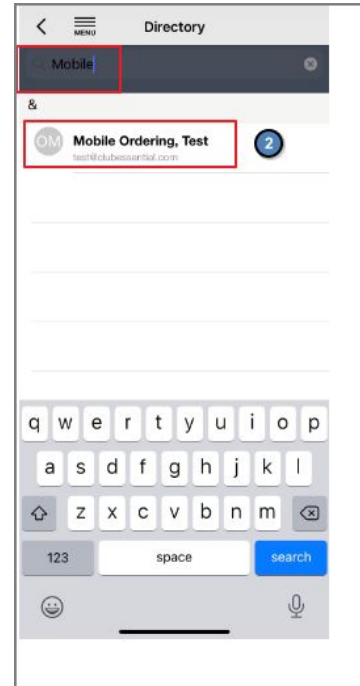
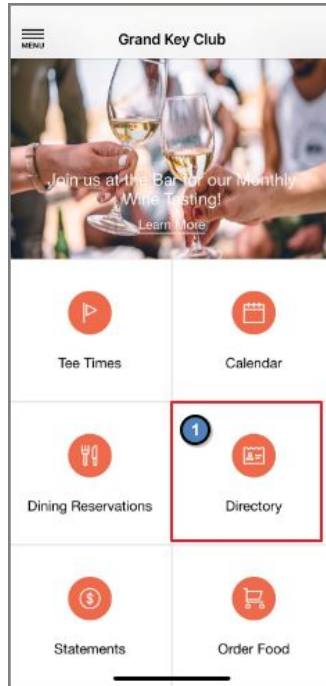
\*Additional members can be added to the test group if needed.



# App-Impersonate Test Member

Login to the App using your staff account (you must have admin rights).

1. Click the **Directory** tile.
2. Search “**Mobile**” to find the **Mobile Ordering Test** member.
3. Open the profile, click the button **To Impersonate User**.
4. Click the **Menu** icon at the top.

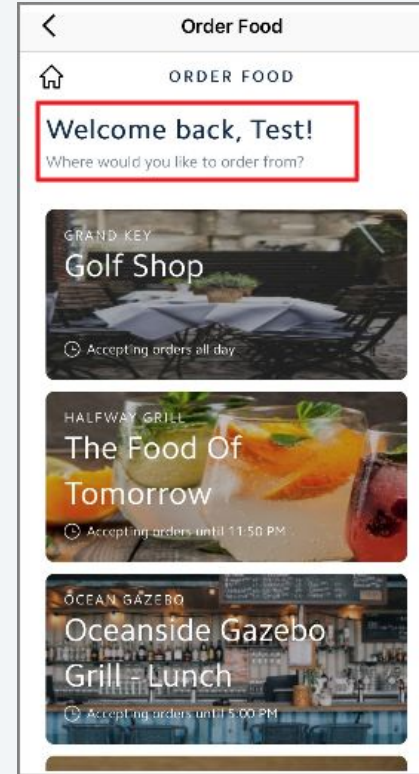
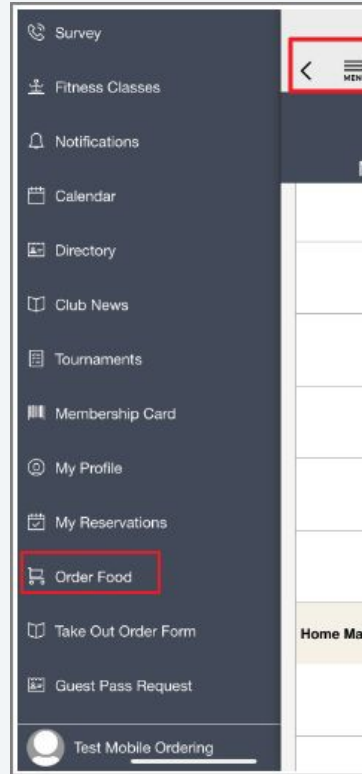




## Test Mobile Ordering

From the **Menu bar**, select **Order Food** (Cart Icon).

Mobile Ordering Options for your club will appear. Select the location and continue through the Member Experience.



# Future Orders- Holiday Menus

Create a **Mobile Menu** specifically for **Catering Options** to fit the needs of a gathering of family or friends!

Customize your menu dates, times and items offered!

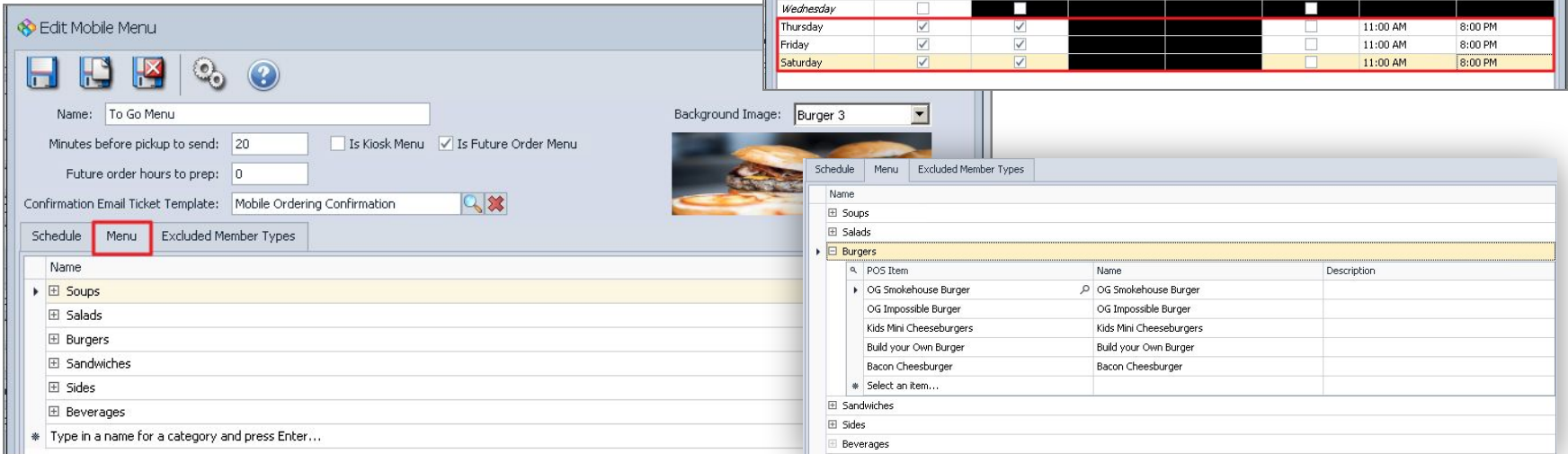
The screenshots illustrate the configuration of a mobile menu for catering. The top window shows the 'Schedule' tab with a table of days and times. The middle window shows the 'Menu' tab with a category tree. The bottom window shows the 'Entrees' category selected, displaying a list of menu items.

Day	Enabled	Visible All Day	Start Time	End Time	Accepting All Day	Start Time	End Time
Sunday	<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>		
Monday	<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>		
Tuesday	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			<input type="checkbox"/>	9:00 AM	9:00 PM
Wednesday	<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>		
Thursday	<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>		
Friday	<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>		
Saturday	<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>		

POS Item	Name	Description
	Filet Of Beef Asada Tacos	Filet Of Beef Asada Tacos
	Chicken Enchiladas	Spicy Chicken Enchiladas
	Tuna Tacos	Tuna Tacos
	Seared Salmon	Pan Seared Salmon
	Roasted Duck	Roasted Duck
	Ravioli	Fresh Made Spinach and Cheese Ravioli
	Pork Tenderloin	Roasted Pork Tenderloin
	Select an item...	

Can't dine in? No Problem!

Provide your members with To-Go Options!



The screenshot displays the 'Edit Mobile Menu' interface. The main window shows the menu configuration for 'To Go Menu'. The 'Name' field is 'To Go Menu'. The 'Minutes before pickup to send' is set to 20. The 'Is Future Order Menu' checkbox is checked. The 'Background Image' is set to 'Burger 3'. The 'Confirmation Email Ticket Template' is 'Mobile Ordering Confirmation'. The 'Schedule' tab is active, showing a table of days and their availability.

Day	Enabled	Visible All Day	Start Time	End Time	Accepting All Day	Start Time	End Time
Sunday	<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>		
Monday	<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>		
Tuesday	<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>		
Wednesday	<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>		
Thursday	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			<input type="checkbox"/>	11:00 AM	8:00 PM
Friday	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			<input type="checkbox"/>	11:00 AM	8:00 PM
Saturday	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			<input type="checkbox"/>	11:00 AM	8:00 PM

The 'Menu' tab is also visible, showing a list of menu items under the 'Burgers' category:

POS Item	Name	Description
OG Smokehouse Burger	OG Smokehouse Burger	
OG Impossible Burger	OG Impossible Burger	
Kids Mini Cheeseburgers	Kids Mini Cheeseburgers	
Build your Own Burger	Build your Own Burger	
Bacon Cheesburger	Bacon Cheesburger	

# Q&A

