CLUBESSENTIAL

Mobile Ordering

March 2020

Ask a Question at Any Time!

Questions will be addressed at the end of the webinar.

Visit our Knowledge Base at **kb.clubessential.com**

Meet your Host

Jen Montano
&
Justin Brown

Use Case Scenario / Agenda

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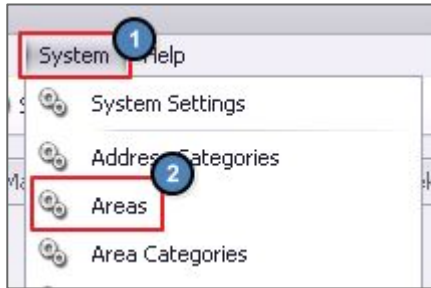
In this webinar, we will discuss:
- Area Set-up
- Menu Creation
- Member Access-Mobile Ordering on the App
- How your club can utilize this feature for Holiday Menus, Catering or To-Go Orders.

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.

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.*

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**.
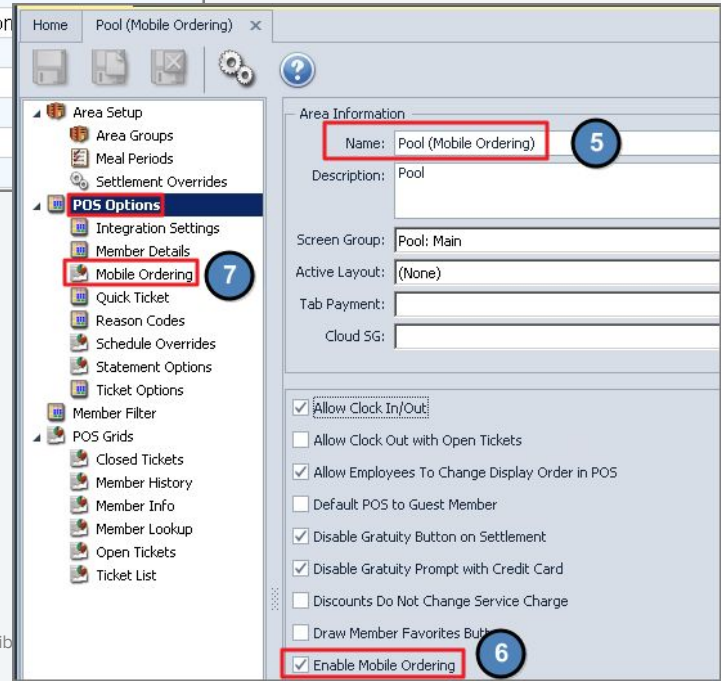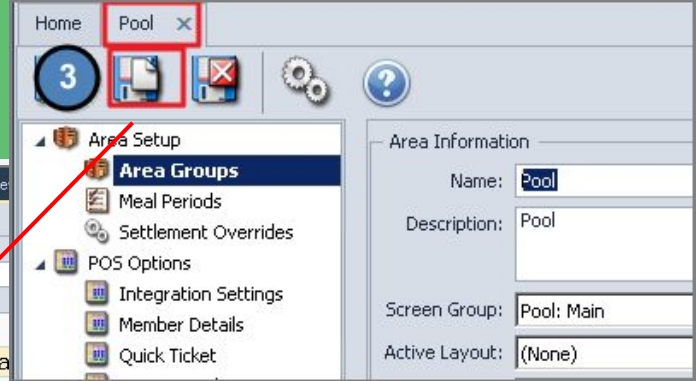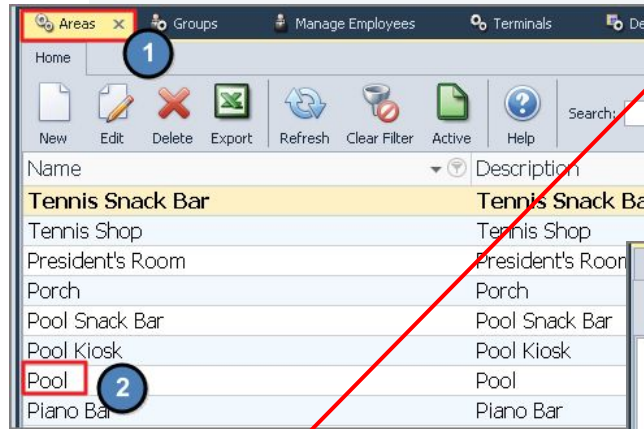
Area Permissions-Step 1

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.

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.**
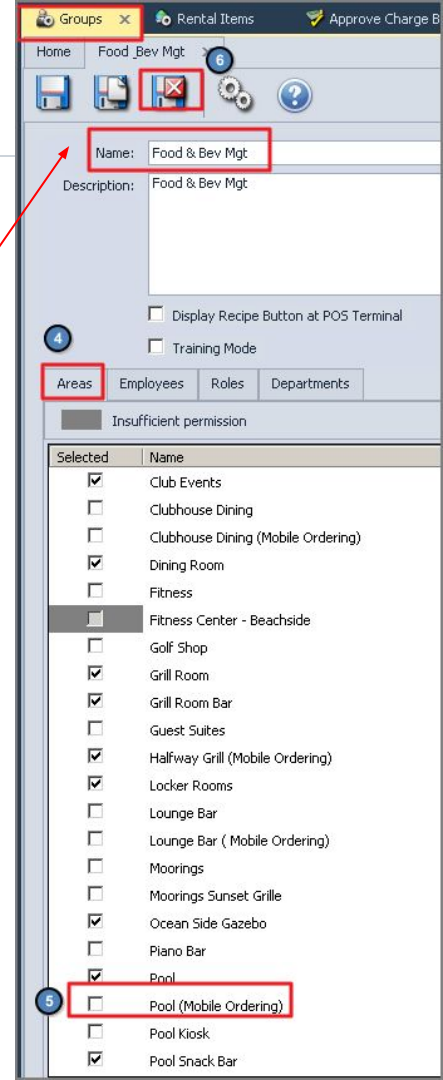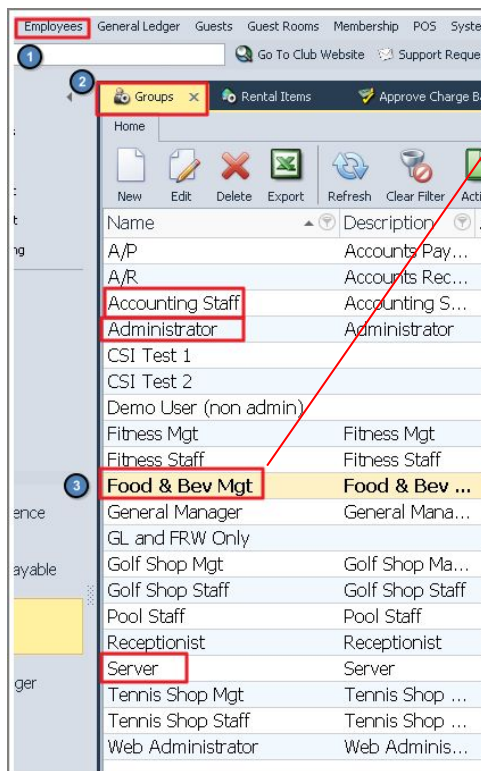
Area Set Up-Mobile Ordering

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**
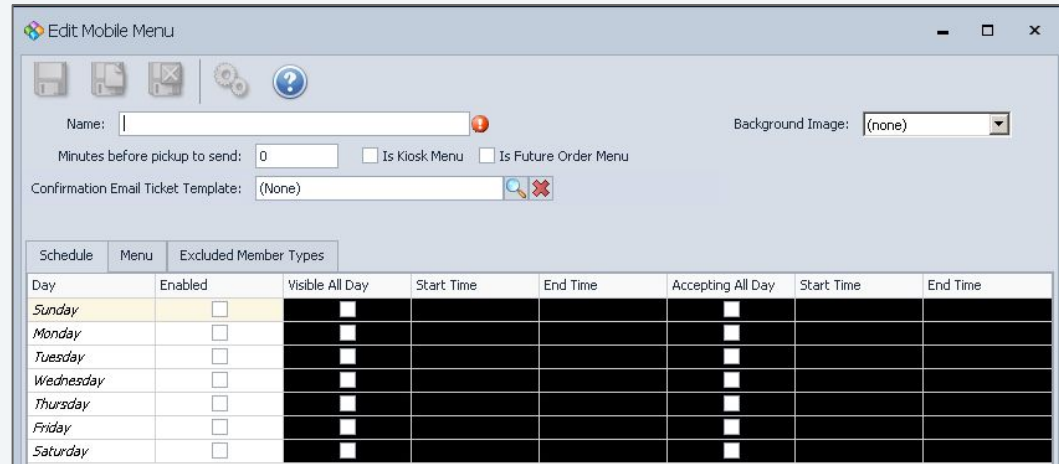
Add a Menu

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.

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.

Menu Screen-Future Order

4. Is Future Order Menu

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**.

Confirmation and Image

5. Confirmation Email Ticket Template

6. Background Image

⊟ Schedule

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

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

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.

Drop down options are now:
All Day
None
Timed

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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.
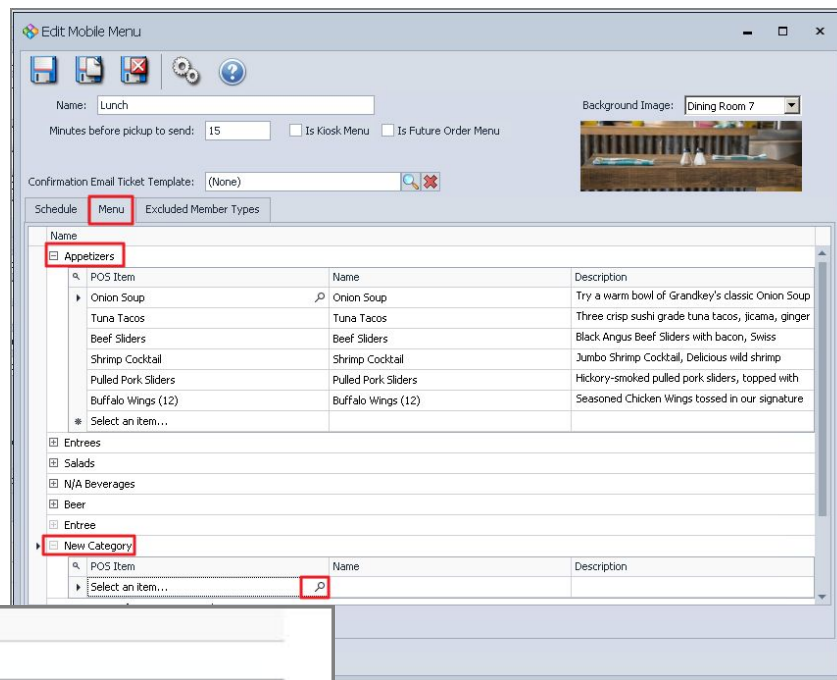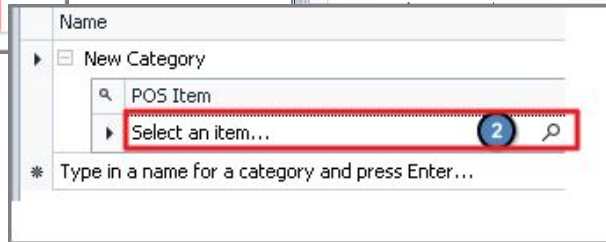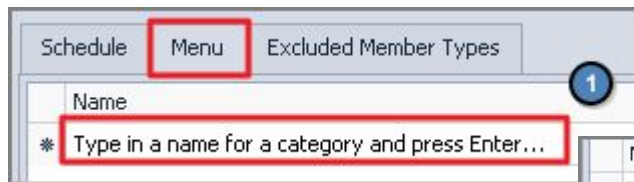
Tips when Searching for an Item:

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.

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.
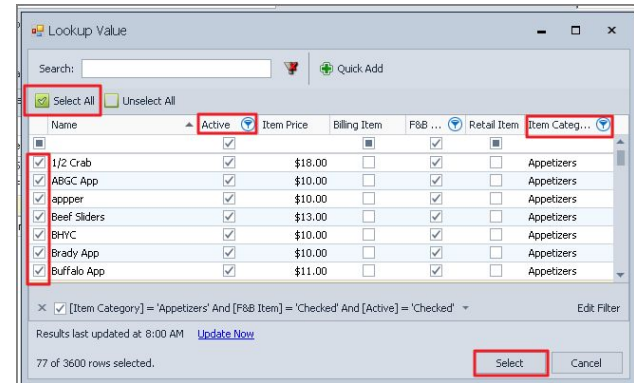
Excluded Member Type

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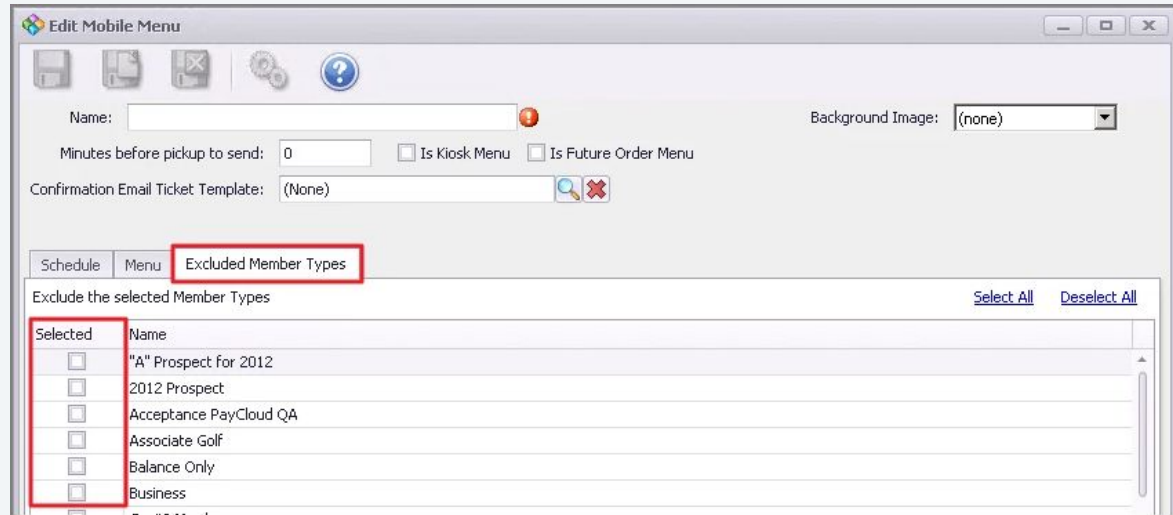
Edit Modifiers

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.

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.
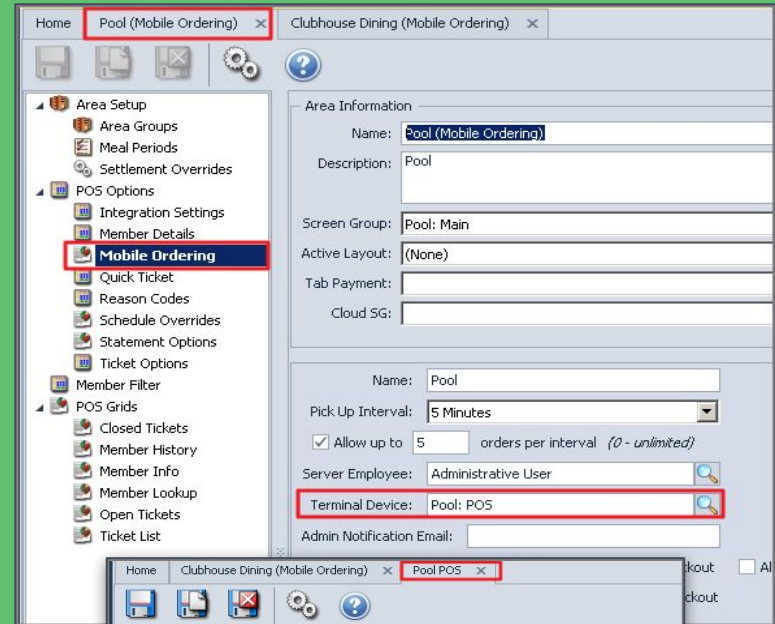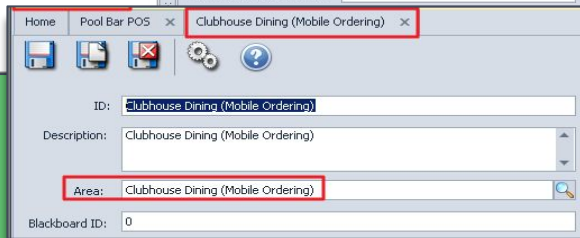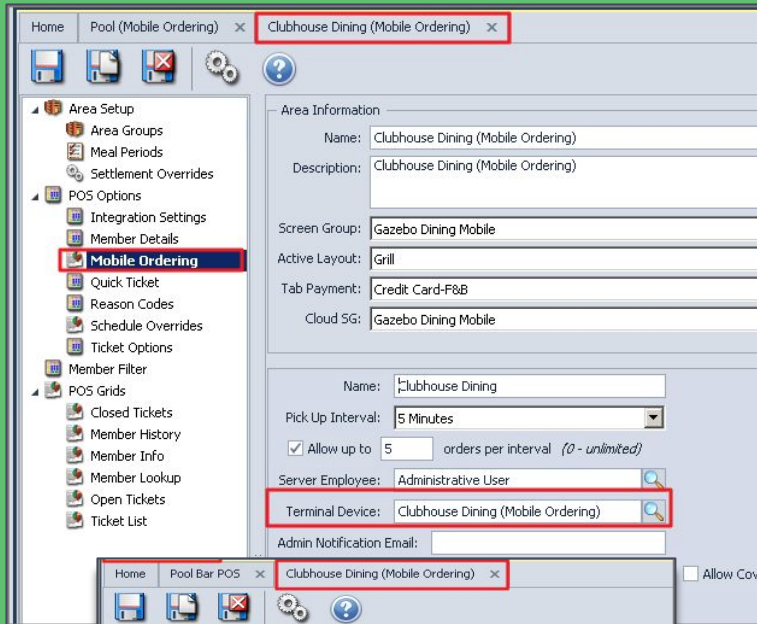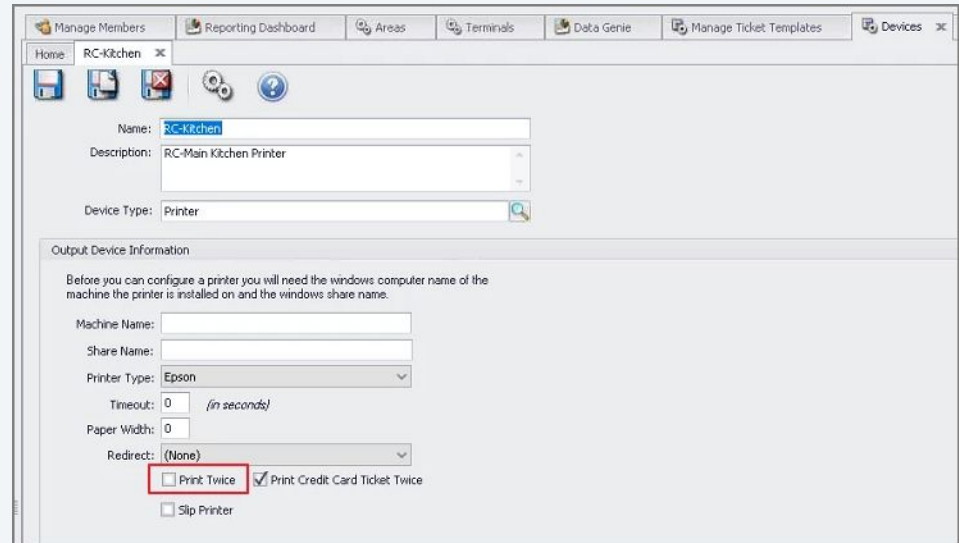
Item Categories/Non-Alcoholic Beverages

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.

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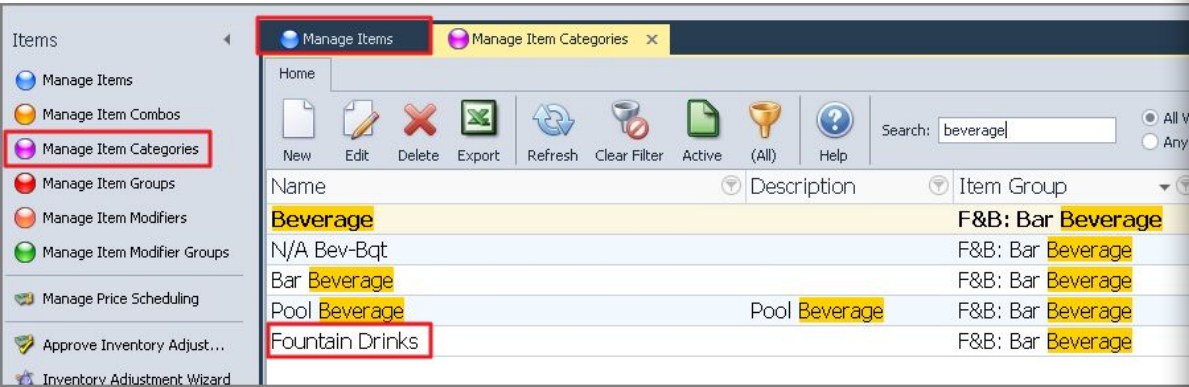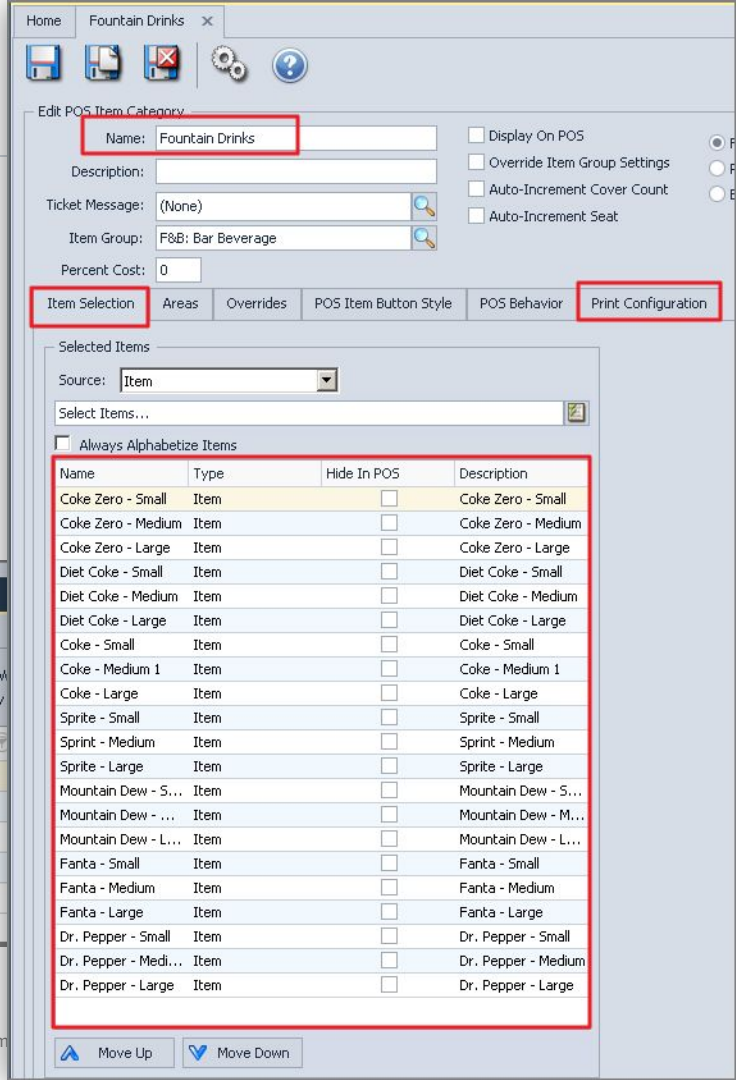
This is only needed on **Mobile orders** for Beverage Item Categories.

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).

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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.**
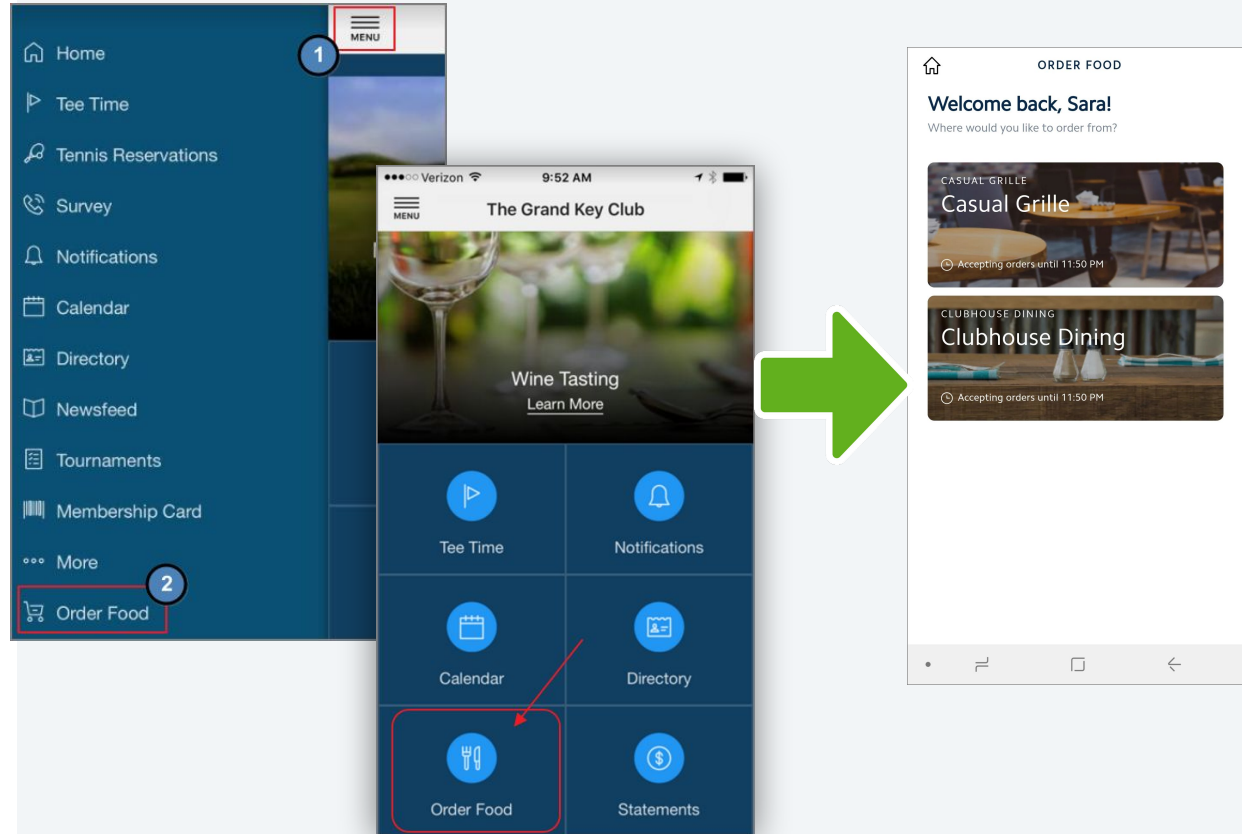
Placing an Order

- Main Screen>Select Menu/Location to Order from.
- Top Level Menu Categories Display.
- Tap Category to see list of items.
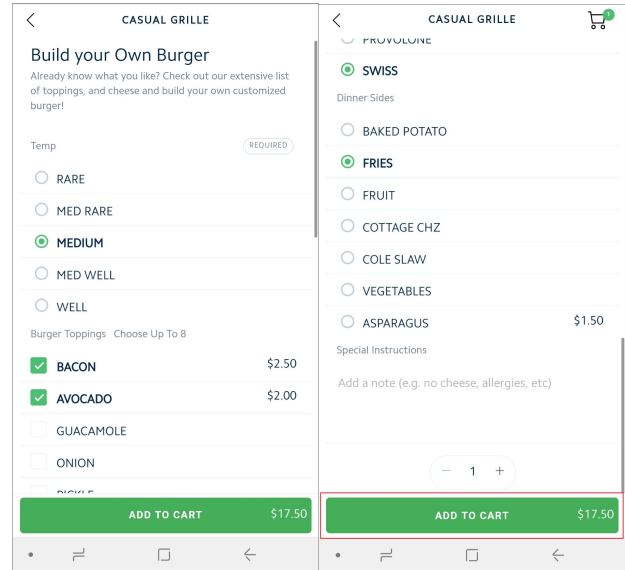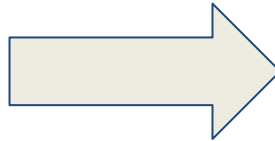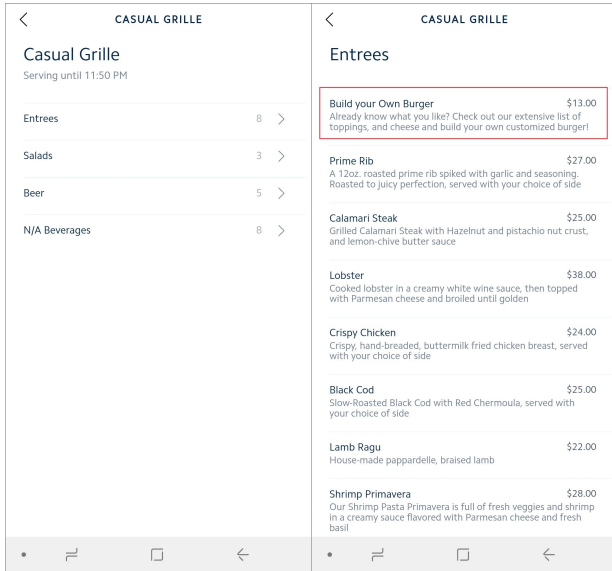
- Modifier selections are made.
- Special instructions added.
- Add To Cart.

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.

MY CART

Order Summary

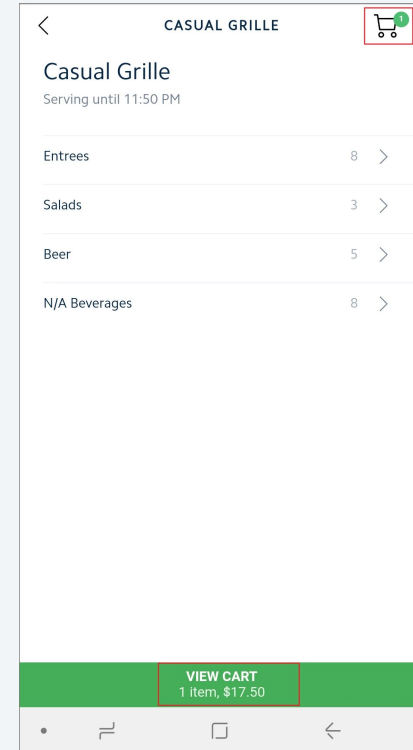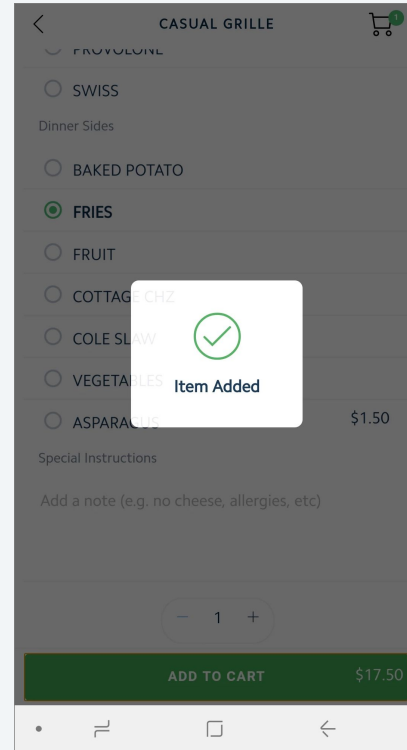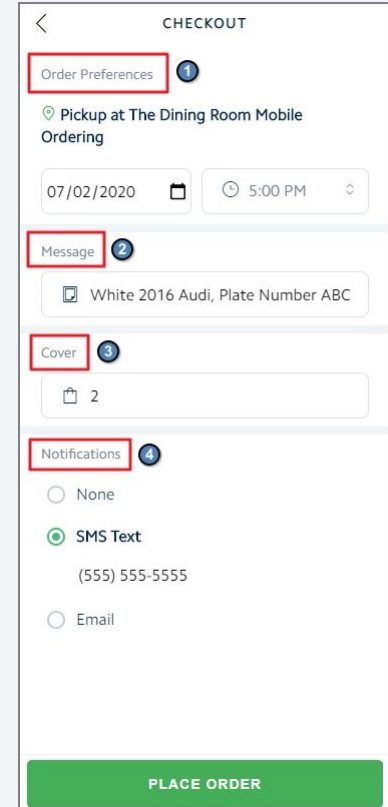| 1 ▾ | Build your Own Burger | $13.00 |
	MEDIUM	
	BACON	+$2.50
	AVOCADO	+$2.00
	PEPPER JACK	
	FRIES	
	Delete	

| Subtotal | $17.50 |
| Taxes and Fees | $1.25 |

| CHECKOUT | $18.75 |

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

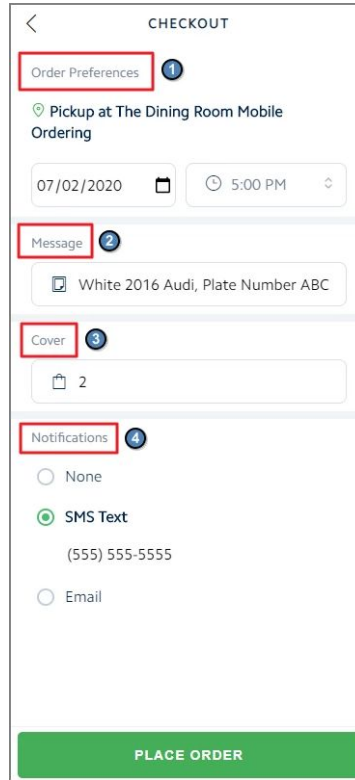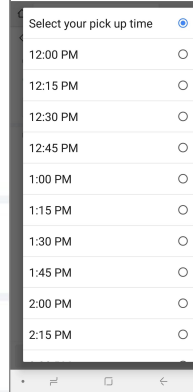# Checkout Options

Order Preferences

(Based on CMA settings)

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

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**.

Once the order has been placed, a **Confirmation** on the ordering screen will appear.
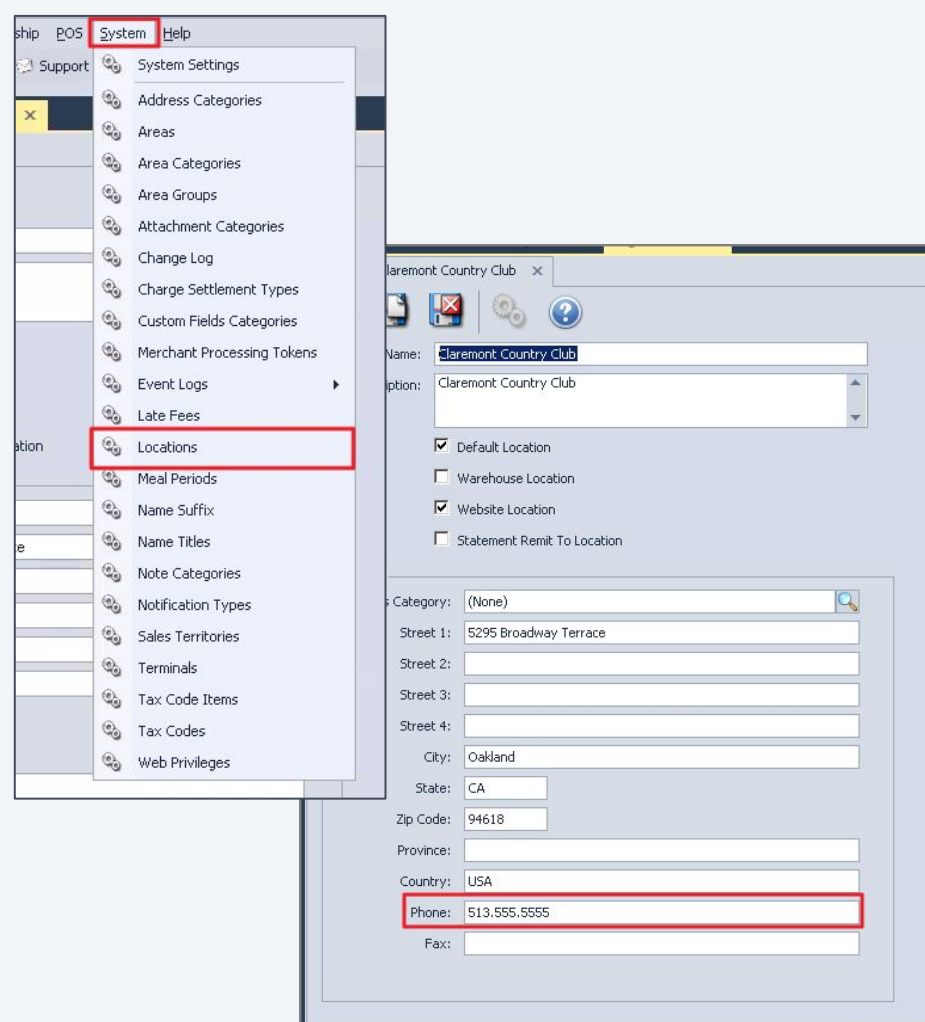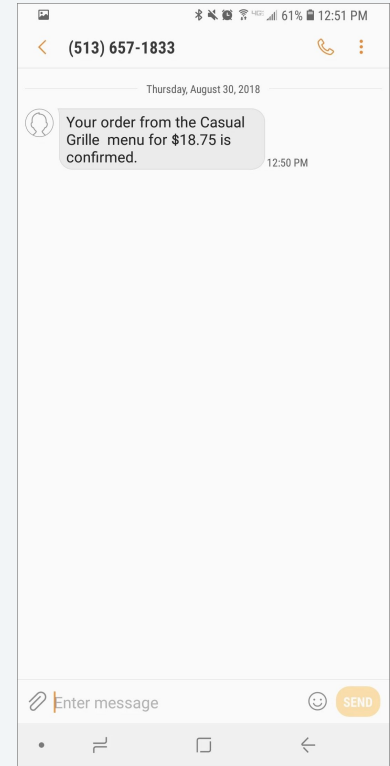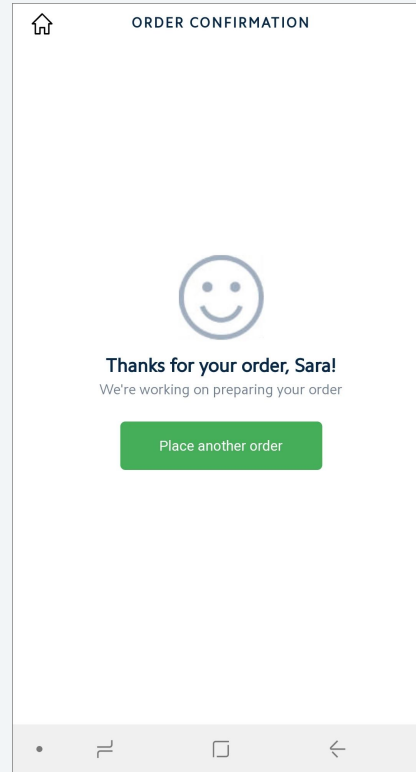
An option to **Place another order** will appear.

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

ORDER CONFIRMATION

Thanks for your order, Sara!

We're working on preparing your order

Place another order

(513) 657-1833

Thursday, August 30, 2018

Your order from the Casual Grille menu for $18.75 is confirmed.

12:50 PM

Enter message

SEND

Mobile POS (Terminal Device)

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.


Clubessential Office: Club at Grand Key

Select Device ⌄

🔍 mobile ✕

⚪ Clubhouse Dining (Mobile Ordering)

⚪ Halfway Grill (Mobile Ordering)

⚪ Lounge Bar (Mobile Ordering)

Clubhouse Dining (Mobile Ordering)   A. User

| Open Tickets | Mobile Orders | Tee Times | Dining | Events | Closed Tickets |

	TICKET #	MEMBER #	MEMBER NAME	DELIVERY	TIME	
☐	7943	00776-B	Adkins, Megan	Pickup	3:05 PM	↱

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.
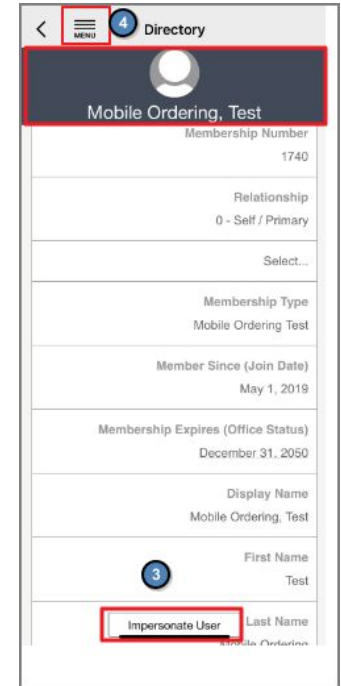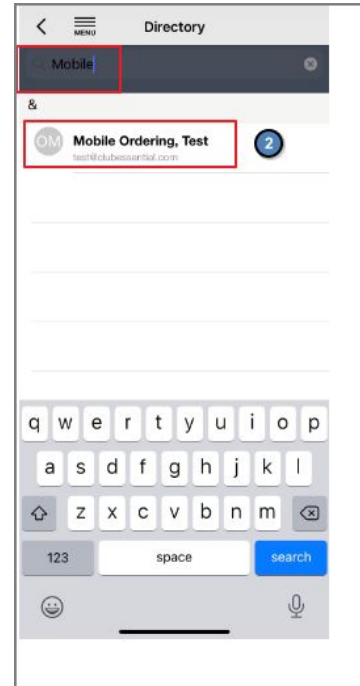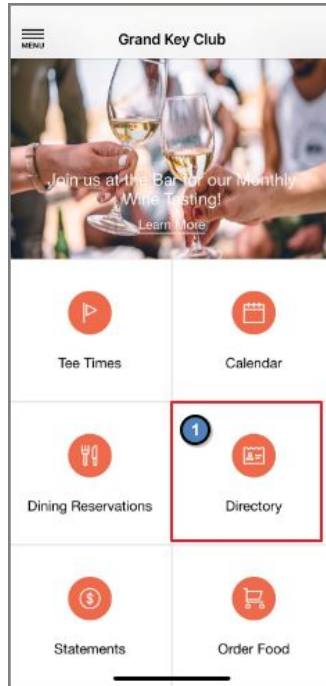
*Additional members can be added to the test group if needed.
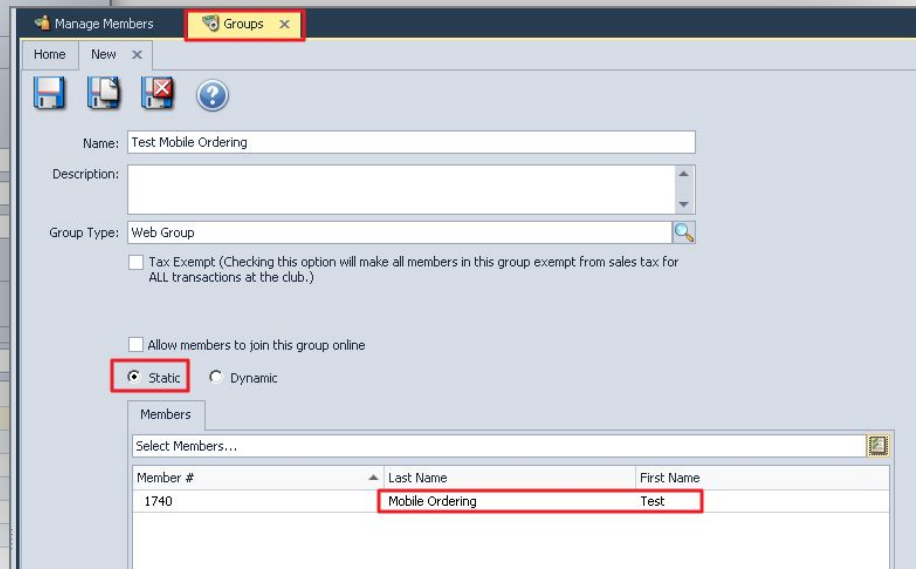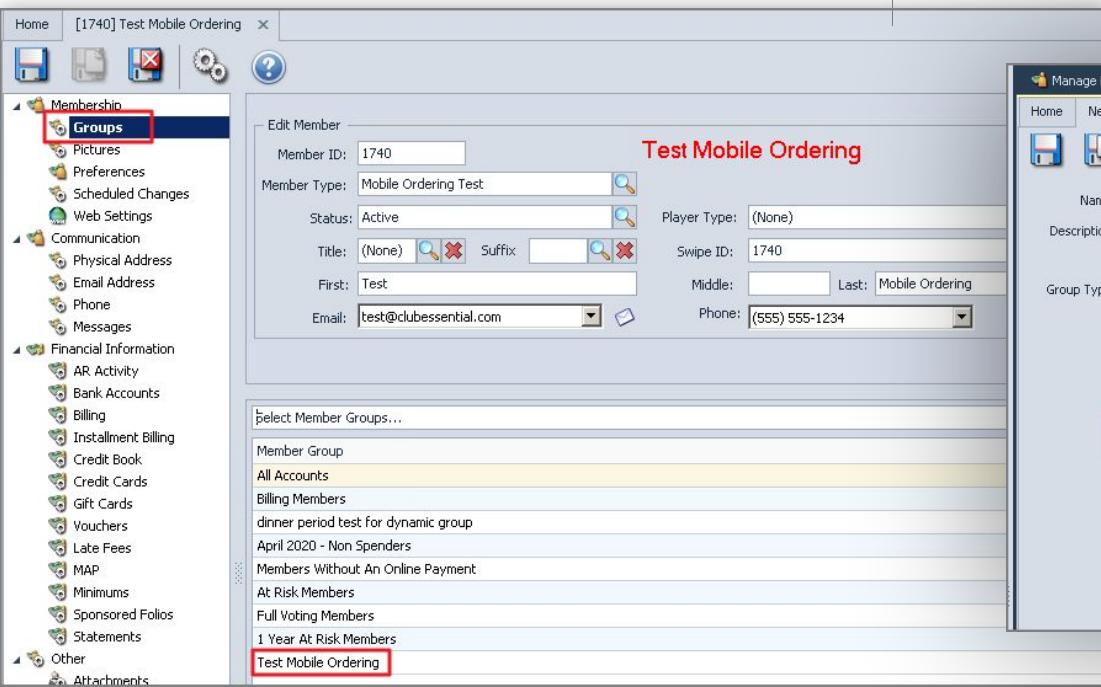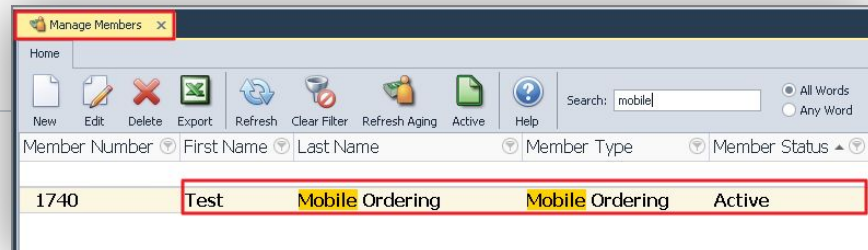
App-Impersonate Test Member

Login to the App using your <u>staff account</u> (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.**

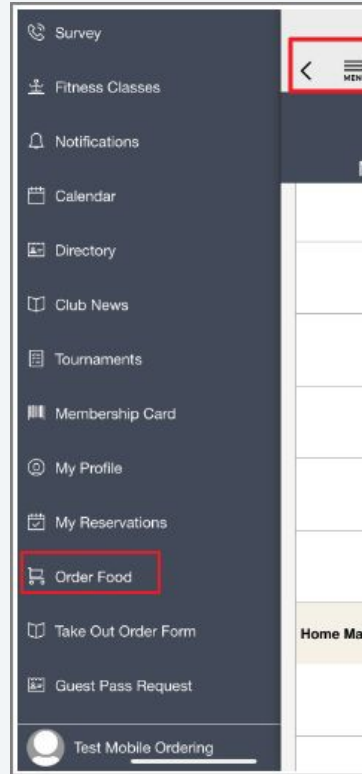4. Click the **Menu** icon at the top.

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.
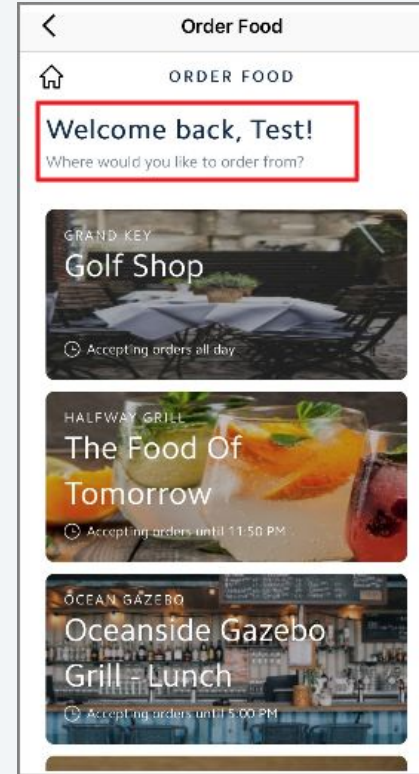
Future Orders- Holiday Menus

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!

To Go Orders

Can't dine in? No Problem!

Provide your members with To-Go Options!

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Q&A