

Mobile Ordering



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 Meet your Host



Justin Brown
&
Ali Duncan



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.

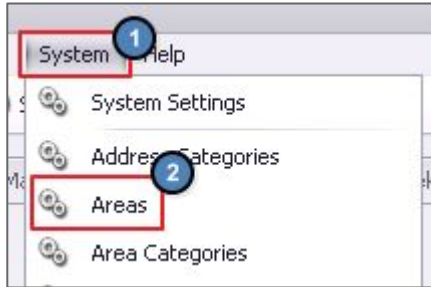
In this webinar, we will discuss:

- 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.

A screenshot of a software interface showing the 'Areas' configuration window. The 'Clubhouse Dining (Mobile Ordering)' area is selected and highlighted with a red box. The 'POS Options' section is expanded, and the 'Enable Mobile Ordering' checkbox is checked and highlighted with a red box. The 'Area Information' section shows details for the selected area, including Name, Description, Screen Group, Active Layout, Tab Payment, and Cloud SG. The 'Area Setup' section includes options for Area Groups, Meal Periods, Settlement Overrides, Integration Settings, Member Details, Mobile Ordering, Quick Ticket, Reason Codes, Schedule Overrides, Ticket Options, and Member Filter. The 'POS Grids' section includes options for Closed Tickets, Member History, Member Info, Member Lookup, Open Tickets, and Ticket List. The 'Area Information' section includes fields for Name, Description, Screen Group, Active Layout, Tab Payment, and Cloud SG. The 'Area Setup' section includes checkboxes for 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, Draw Member Favorites Button, and Enable Mobile Ordering. The 'Area Information' section includes a field for Gratuity Override.

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.

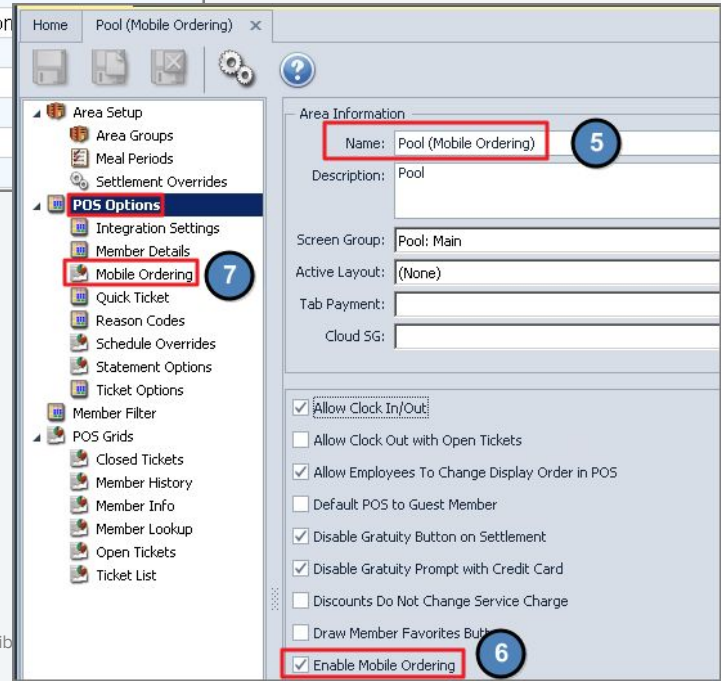
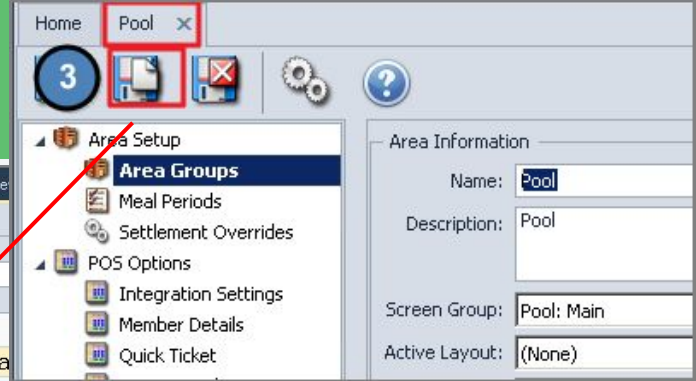
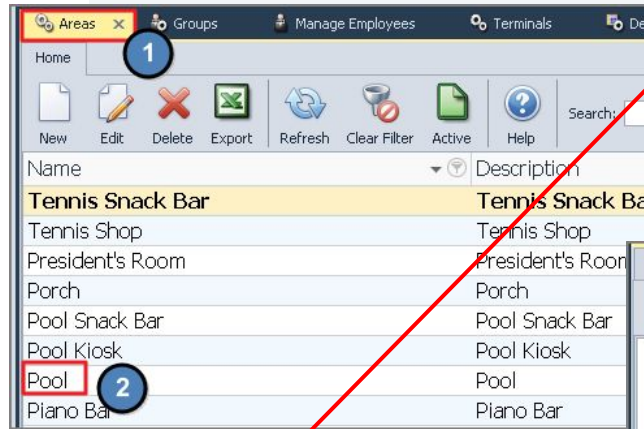
↳ Create a New Area-Save and New

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.

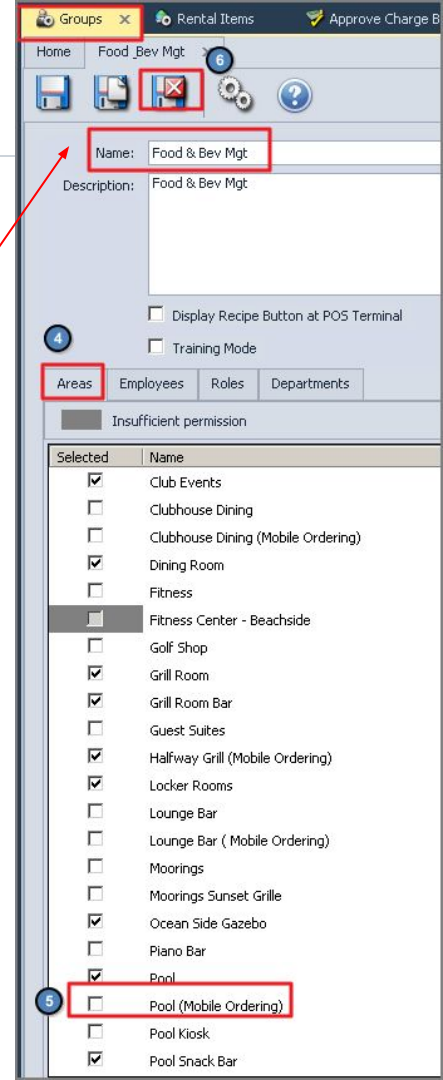
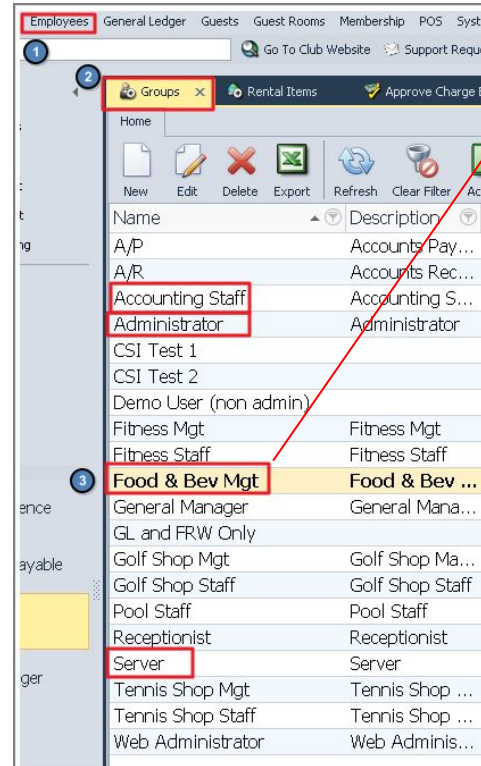
The screenshot displays the 'Manage Employees' interface. The left sidebar shows the 'Security' tab selected, with the 'Areas' sub-tab highlighted. The main panel shows the 'Employee Information' section for a user named 'Administrative User'. Below this is a table of areas with checkboxes for selection. The 'Pool (Mobile Ordering)' area is highlighted with a red box and a blue circle containing the number 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**:

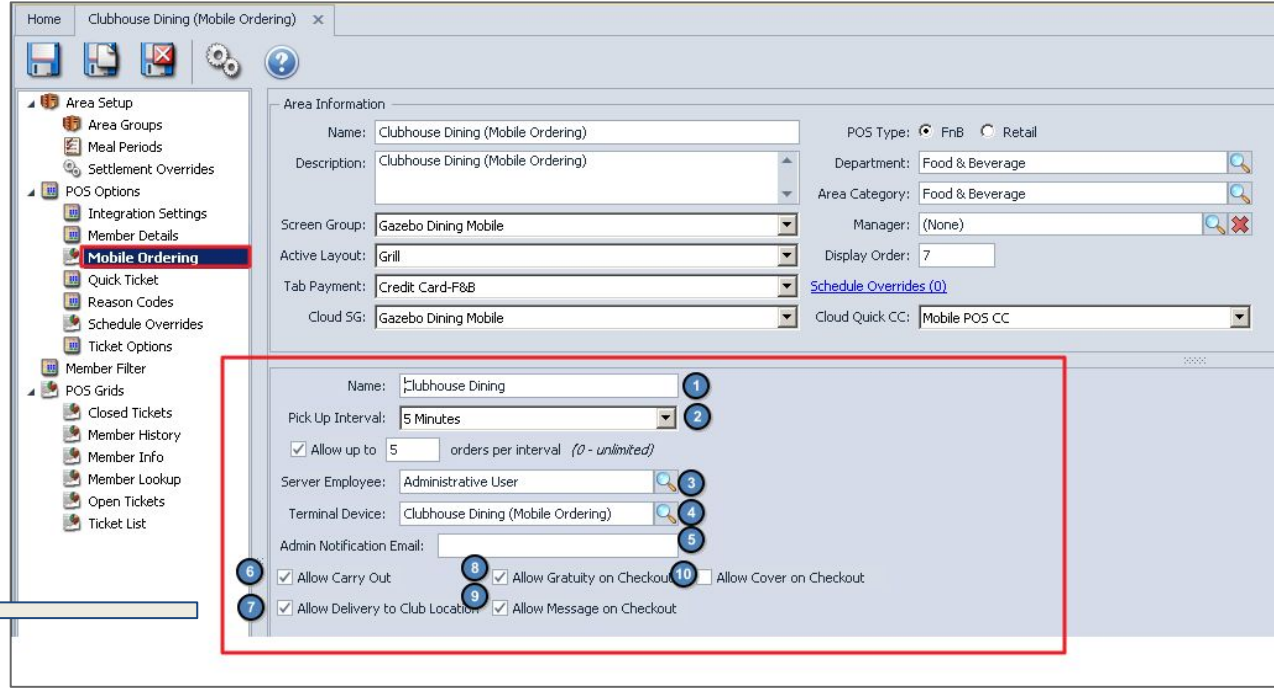
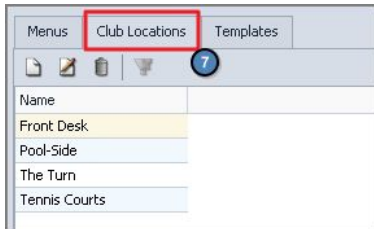
1. Go to **Employees** across the top.
2. Select **Groups**.
3. Select any applicable F&B Group, Server, Admin or Accounting Group.
4. Under the **Areas** tab, place a check next to the new Mobile Ordering Area.
5. **Save and Close**.



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

Schedule Overrides (0)

Name: Clubhouse Dining (1)

Pick Up Interval: 5 Minutes (2)

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

Server Employee: Administrative User (3)

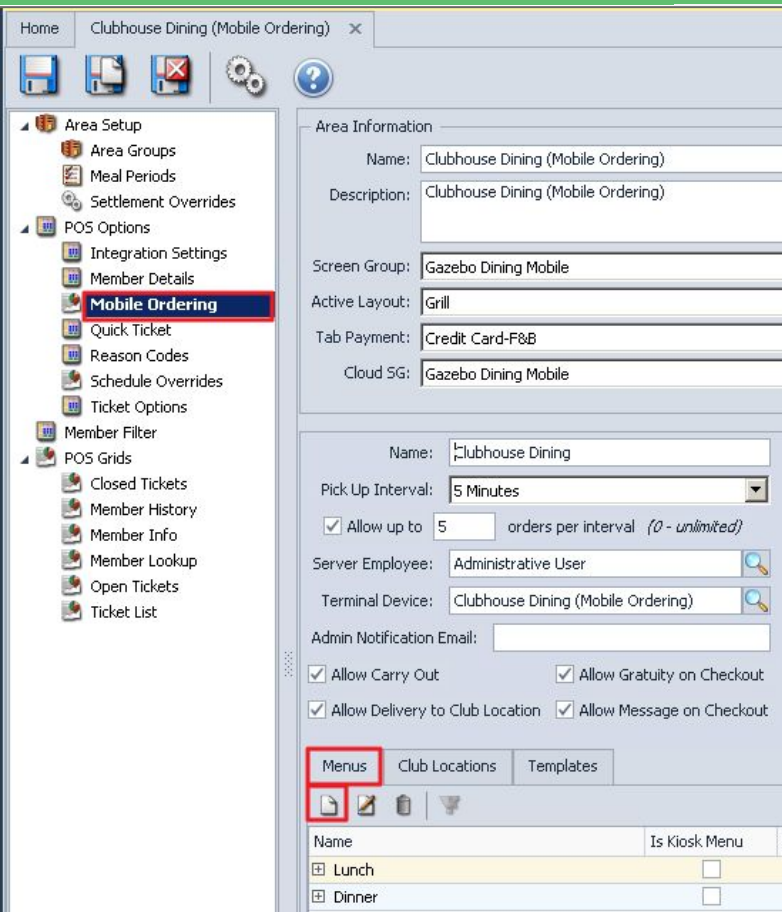
Terminal Device: Clubhouse Dining (Mobile Ordering) (4)

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:

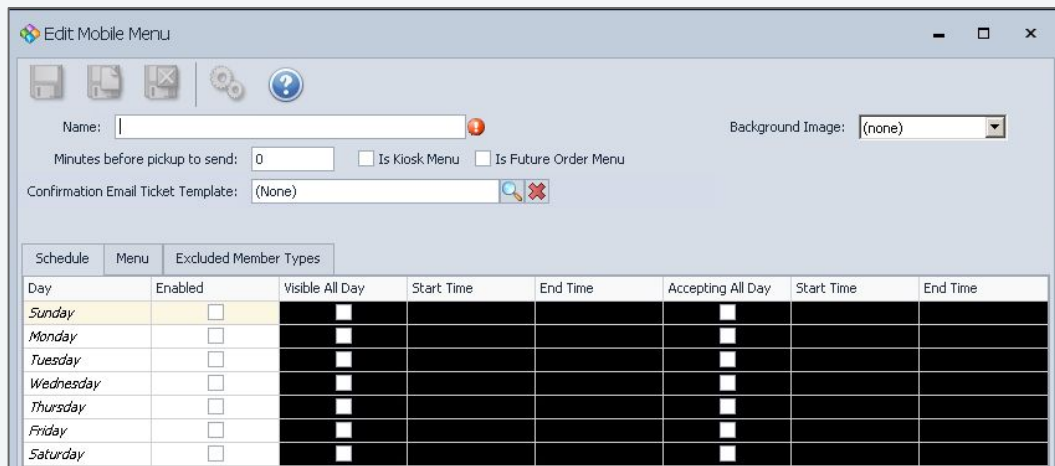
Allow Carry Out Allow Gratuity on Checkout

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: 

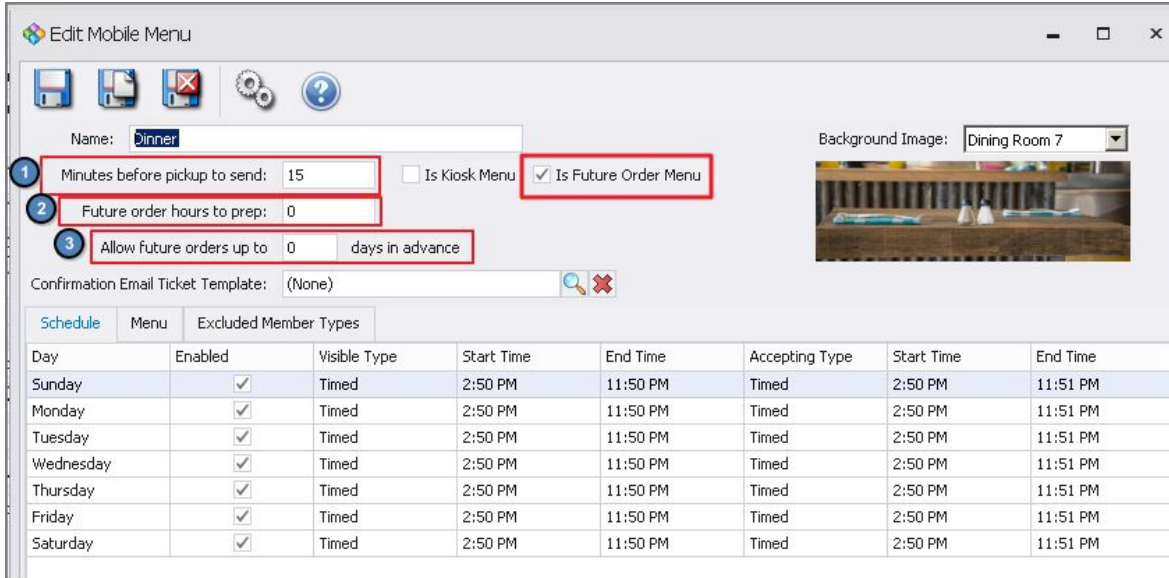
2 Minutes before pickup to send: 3 Is Kiosk Menu 4 Is Future Order Menu

Confirmation Email Ticket Template:   5

6 Background Image:

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



1 Minutes before pickup to send: 15

2 Future order hours to prep: 0

3 Allow future orders up to 0 days in advance

Is Kiosk Menu Is Future Order Menu

Background Image: Dining Room 7

Confirmation Email Ticket Template: (None)

Day	Enabled	Visible Type	Start Time	End Time	Accepting Type	Start Time	End Time
Sunday	<input checked="" type="checkbox"/>	Timed	2:50 PM	11:50 PM	Timed	2:50 PM	11:51 PM
Monday	<input checked="" type="checkbox"/>	Timed	2:50 PM	11:50 PM	Timed	2:50 PM	11:51 PM
Tuesday	<input checked="" type="checkbox"/>	Timed	2:50 PM	11:50 PM	Timed	2:50 PM	11:51 PM
Wednesday	<input checked="" type="checkbox"/>	Timed	2:50 PM	11:50 PM	Timed	2:50 PM	11:51 PM
Thursday	<input checked="" type="checkbox"/>	Timed	2:50 PM	11:50 PM	Timed	2:50 PM	11:51 PM
Friday	<input checked="" type="checkbox"/>	Timed	2:50 PM	11:50 PM	Timed	2:50 PM	11:51 PM
Saturday	<input checked="" type="checkbox"/>	Timed	2:50 PM	11:50 PM	Timed	2:50 PM	11:51 PM

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

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

- 1) **Minutes Before Pickup to Send**
- 2) **Future Order Hours to Prep.**
- 3) **Allow Future Orders Up to _ Days in Advance.**

5. Confirmation Email Ticket Template

6. Background Image

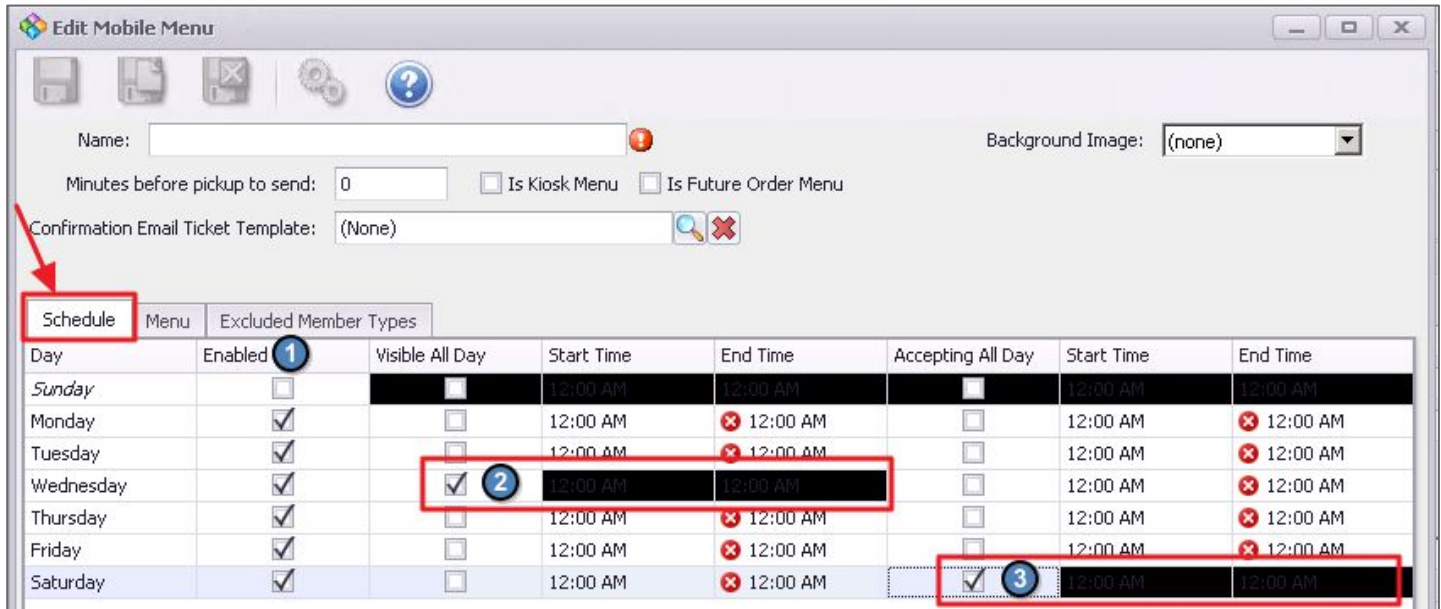


The 'Edit Mobile Menu' configuration window shows various settings for a mobile menu. The 'Confirmation Email Ticket Template' field is highlighted with a red box and contains the text '(None)'. The 'Background Image' dropdown is set to '(none)'. The 'Minutes before pickup to send' is set to 0. The 'Is Kiosk Menu' and 'Is Future Order Menu' checkboxes are unchecked. The 'Confirmation Email Ticket Template' field has a search icon and a close icon. The 'Schedule' tab is selected, showing a table with columns for Day, Enabled, Visible All Day, Start Time, End Time, and Accepting All Day.

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*



Edit Mobile Menu

Name: Background Image: (none)

Minutes before pickup to send: 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 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.

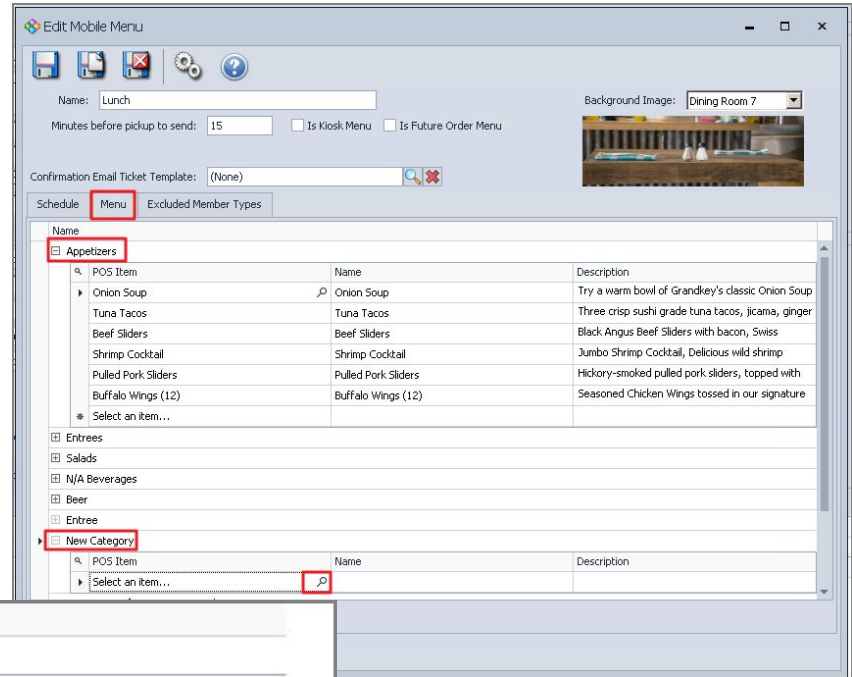
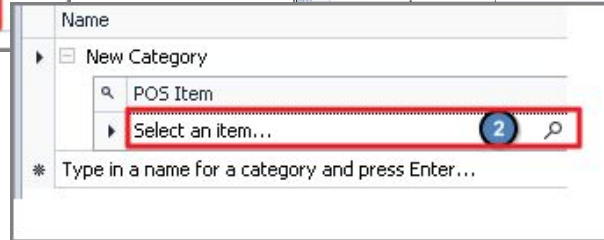
Day	Enabled	Visible Type	Start Time	End Time	Accepting Type	Start Time	End Time
Sunday	<input checked="" type="checkbox"/>	Timed	8:00 AM	11:00 PM	None		
Monday	<input checked="" type="checkbox"/>	Timed	8:00 AM	11:00 PM	Timed	8:00 AM	11:00 PM
Tuesday	<input checked="" type="checkbox"/>	Timed	8:00 AM	11:00 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' application window. At the top, there is a search bar containing the text 'win'. Below the search bar, there are checkboxes for 'Select All' and 'Unselect All'. The main area displays a table with columns: Name, Active, Item Price, Billing Item, F&B It..., Retail Item, and Item Category. The table contains three rows of data: 'Buffalo Wings', 'Chx Wings', and 'Buffalo Wings (12)'. A context menu is open over the 'Retail Item' column, showing options like 'Sort Ascending', 'Sort Descending', 'Clear All Sorting', 'Group By This Column', 'Show Group By Box', 'Remove This Column', 'Column Chooser', 'Best Fit', 'Best Fit (all columns)', 'Filter Editor...', 'Hide Auto Filter Row', and 'Conditional Formatting'. The 'Remove This Column' option is highlighted. At the bottom of the window, there is a filter bar showing '[Item Category] = 'Appetizers''. Below the filter bar, it says 'Results last updated at 8:00 AM' and 'Update Now'. At the very bottom, it says '0 of 3600 rows selected.' and there are 'Select' and 'Cancel' buttons.

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"/>	

Lookup Value

Search: win Quick Add

Select All Unselect All

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

[Item Category] = 'Appetizers' And [F&B Item] = 'Checked' Edit Filter

Results last updated at: 8:00 AM [Update Now](#)

1 of 3600 rows selected. Select Cancel

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.

Name	Name	Description
POS Item		
<input checked="" type="checkbox"/> Buffalo Wings	Buffalo Wings	
* Select an item...		

* Type in a name for a category and press Enter...

Name	Name	Description
POS Item		
<input checked="" type="checkbox"/> Buffalo Wings (12)	Smokin' Buffalo Wings (12)	12 Hot Flavored Wings
* Select an item...		

Lookup Value

Search: Quick Add

Select All Unselect All

Name	Active	Item Price	Billing Item	F&B ...	Retail Item	Item Category
<input checked="" type="checkbox"/> 1/2 Crab	<input checked="" type="checkbox"/>	\$18.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Appetizers
<input checked="" type="checkbox"/> ABGC App	<input checked="" type="checkbox"/>	\$10.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Appetizers
<input checked="" type="checkbox"/> apper	<input checked="" type="checkbox"/>	\$10.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Appetizers
<input checked="" type="checkbox"/> Beef Sliders	<input checked="" type="checkbox"/>	\$13.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Appetizers
<input checked="" type="checkbox"/> BHTC	<input checked="" type="checkbox"/>	\$10.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Appetizers
<input checked="" type="checkbox"/> Brady App	<input checked="" type="checkbox"/>	\$10.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Appetizers
<input checked="" type="checkbox"/> Buffalo App	<input checked="" type="checkbox"/>	\$11.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Appetizers

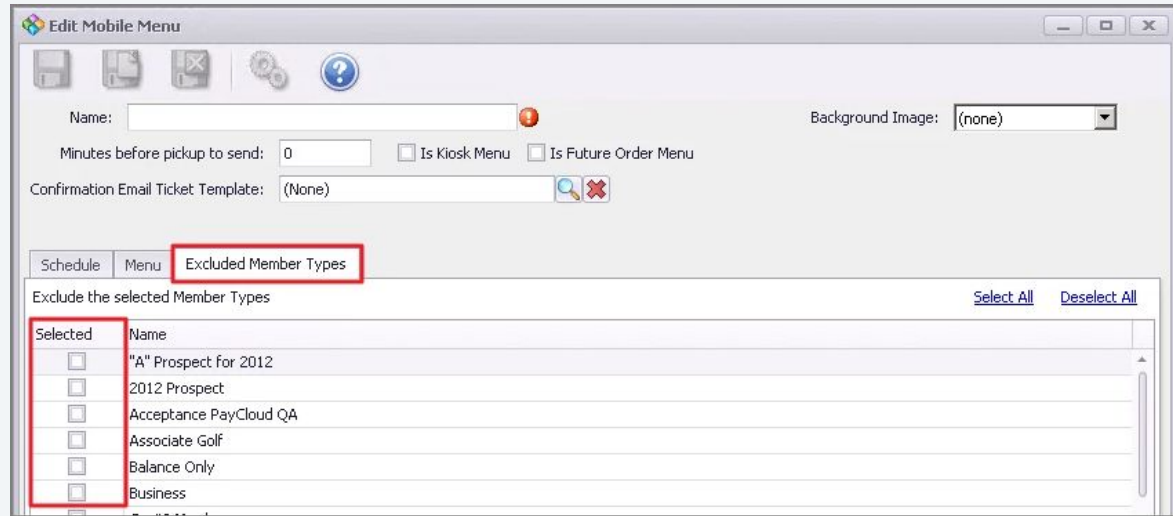
[Item Category] = 'Appetizers' And [F&B Item] = 'Checked' And [Active] = 'Checked' Edit Filter

Results last updated at: 8:00 AM [Update Now](#)

77 of 3600 rows selected. Select Cancel

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.

The screenshot displays the 'Manage Items' interface for a 'Burger' item. The left sidebar shows a 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 'Burger Toppings', 'Cheese', and 'Dinner Sides'; the right one shows a 'Select Item Modifier Groups...' dialog with 'Temp' selected. Red arrows and numbered circles (1-7) indicate the sequence of actions described in the list.

Device Settings



Terminal Devices

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

Home Pool (Mobile Ordering) x 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:

Home Pool Bar POS x Clubhouse Dining (Mobile Ordering) x

ID: Clubhouse Dining (Mobile Ordering)

Description: Clubhouse Dining (Mobile Ordering)

Area: Clubhouse Dining (Mobile Ordering)

Blackboard ID: 0

Home Pool (Mobile Ordering) x 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
 - Statement Options
 - Ticket Options
- Member Filter
- POS Grids
 - Closed Tickets
 - Member History
 - Member Info
 - Member Lookup
 - Open Tickets
 - Ticket List

Area Information

Name: Pool (Mobile Ordering)

Description: Pool

Screen Group: Pool: Main

Active Layout: ((None))

Tab Payment:

Cloud SG:

Name: Pool

Pick Up Interval: 5 Minutes

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

Server Employee: Administrative User

Terminal Device: Pool: POS

Admin Notification Email:

Home Clubhouse Dining (Mobile Ordering) x Pool POS x

ID: Pool POS

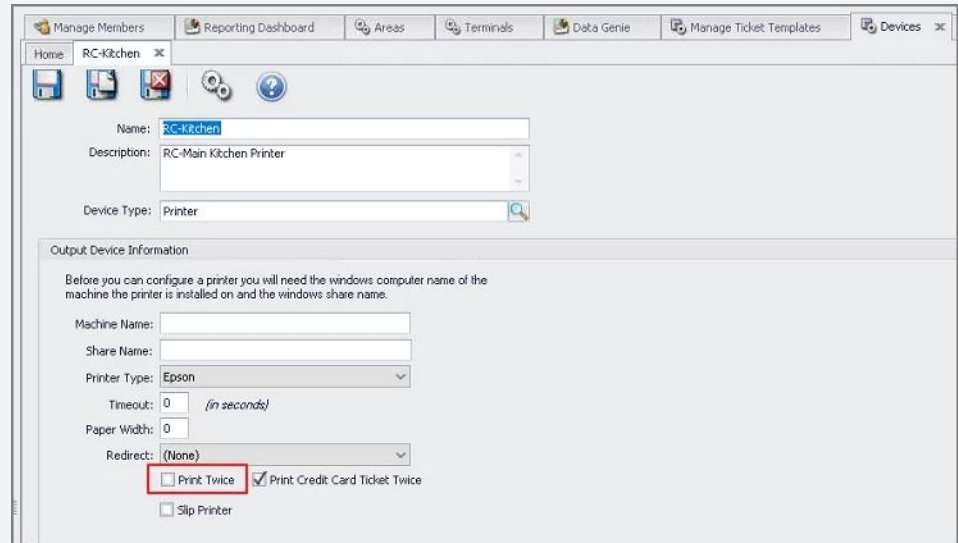
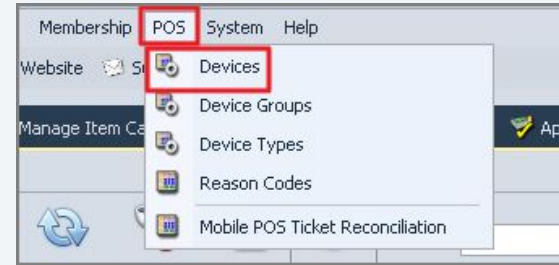
Description: Pool POS

Area: Pool

Blackboard ID: 0

Ticket Printing (Mobile Ordering)

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

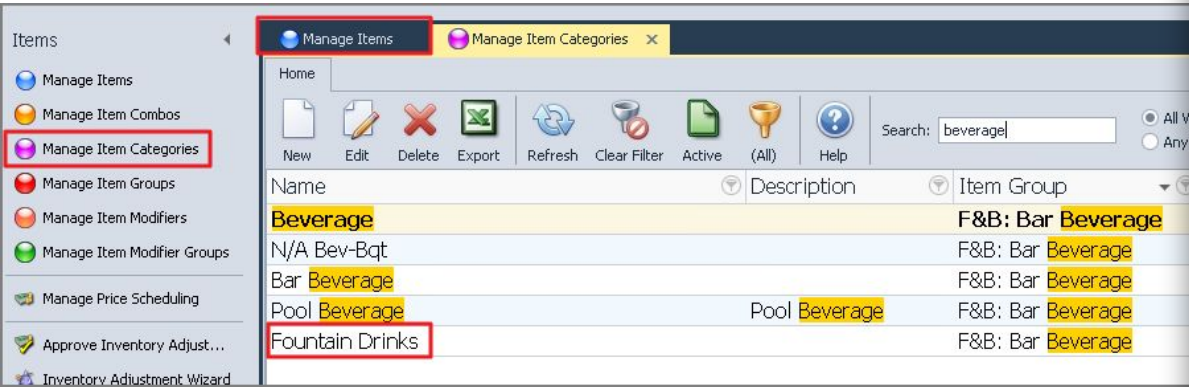


Item Categories/Non-Alcoholic Beverages

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.



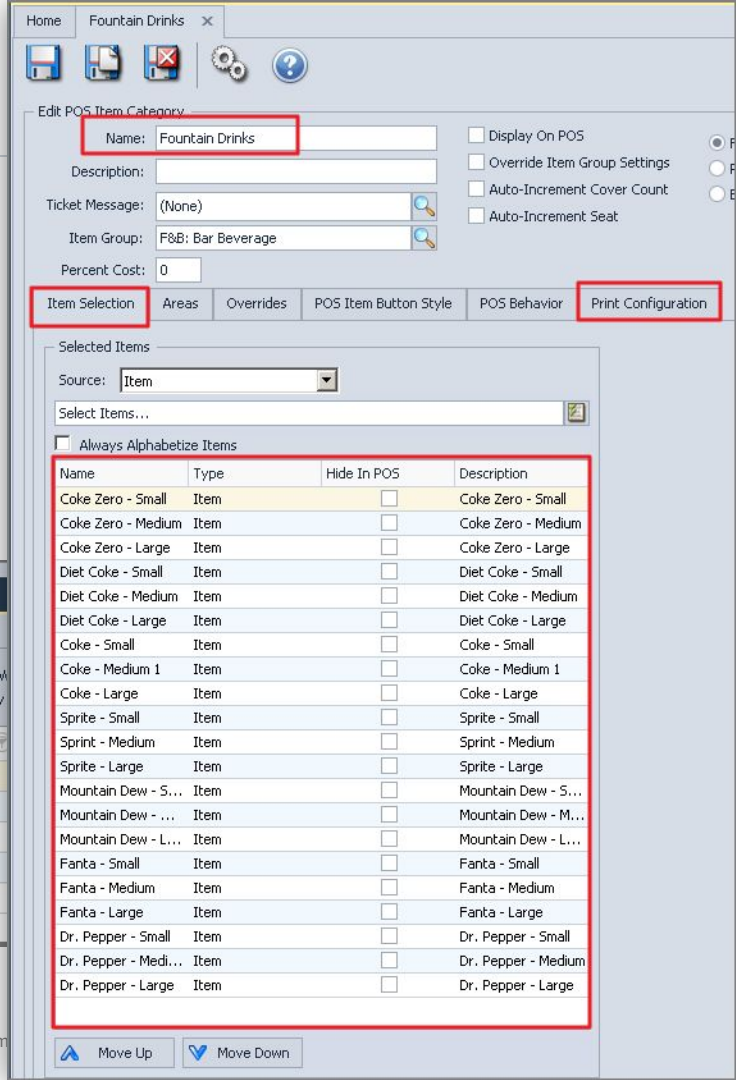
Home

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.

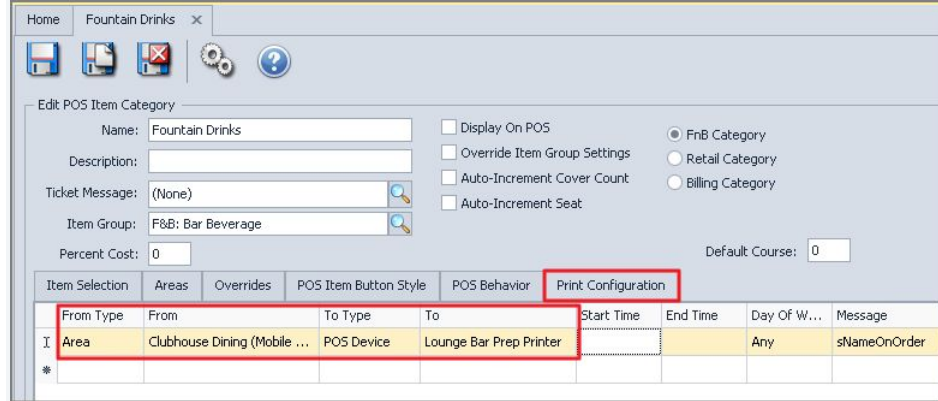
Here you will assign **where the Items are coming from** (Area/Select Which Mobile Area) and **where they are going to** (POS Device/ select which POS prep printer).

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

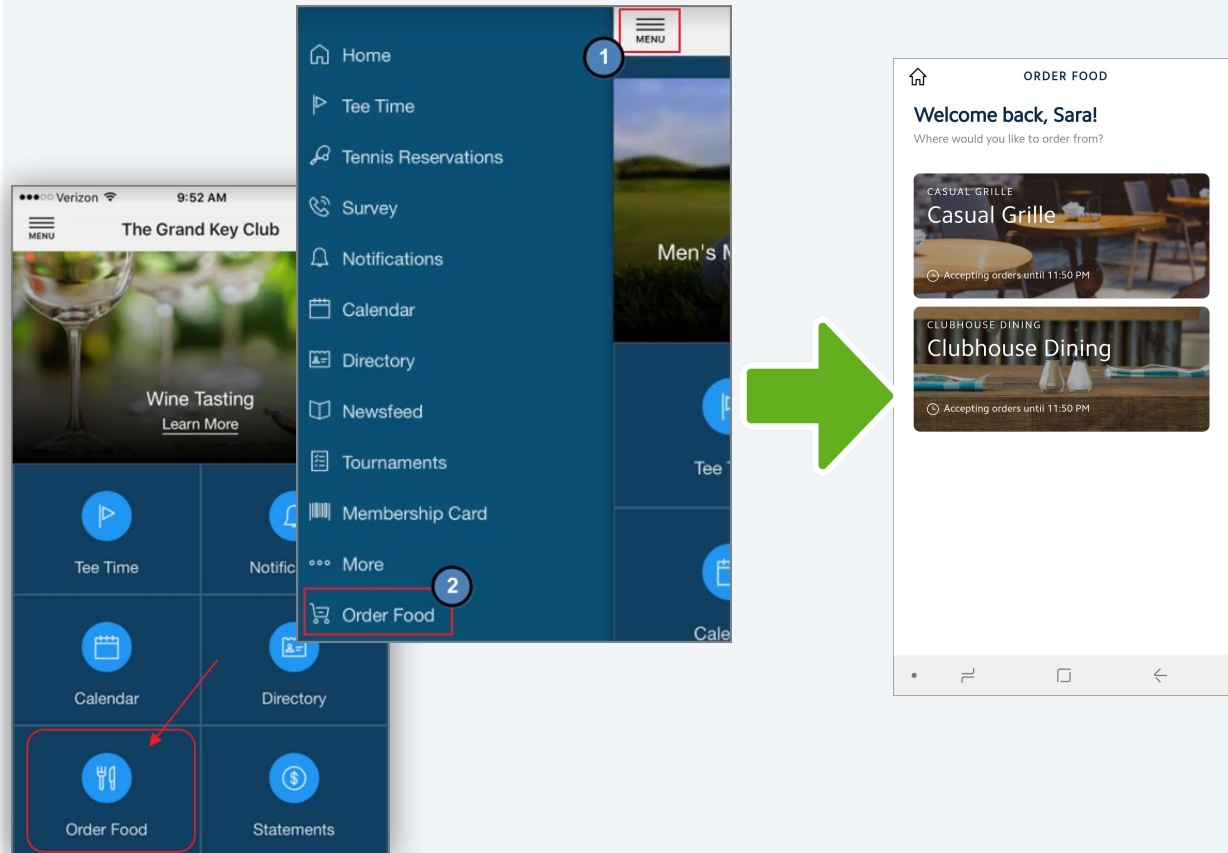


Member Access

Mobile Ordering on the App

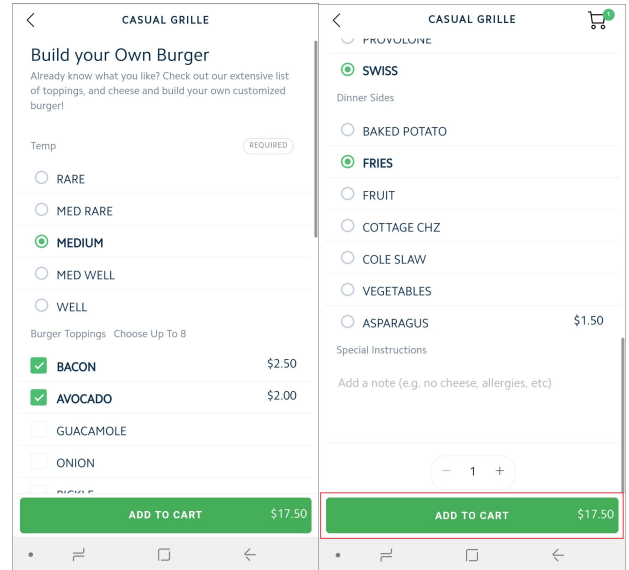
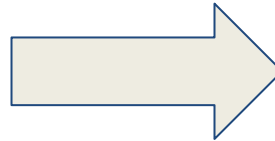
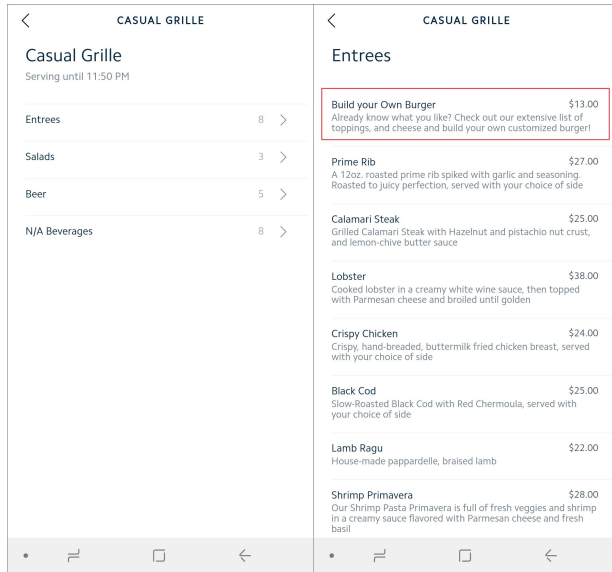
Two ways to Order:

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.

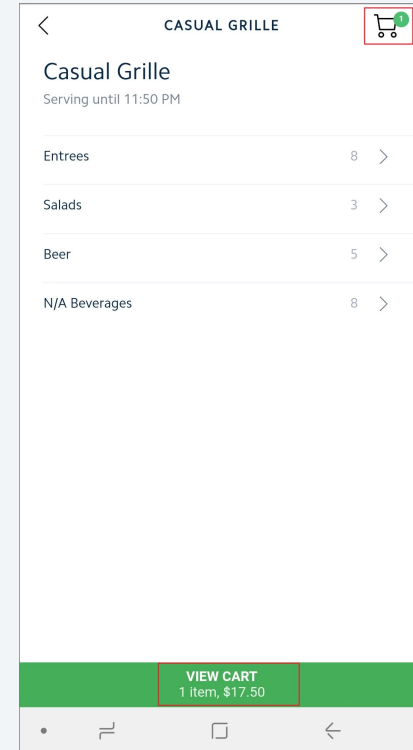
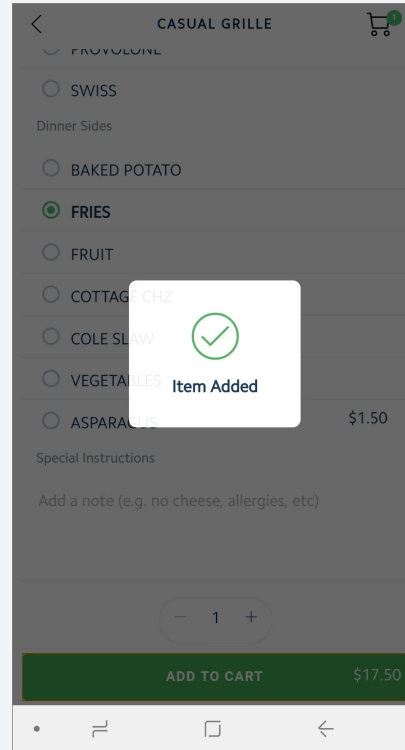
Order Confirmation

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.

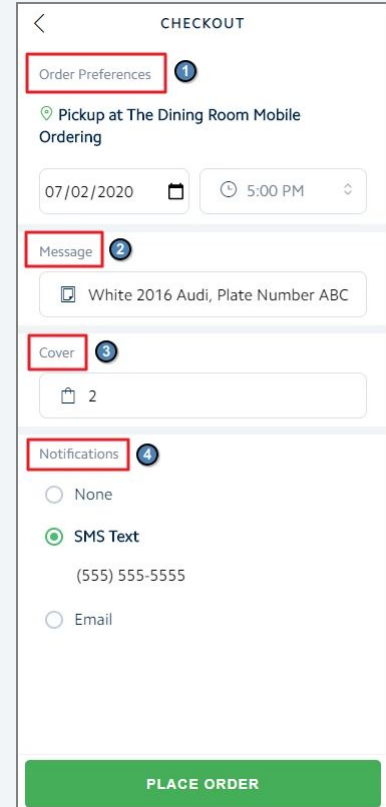
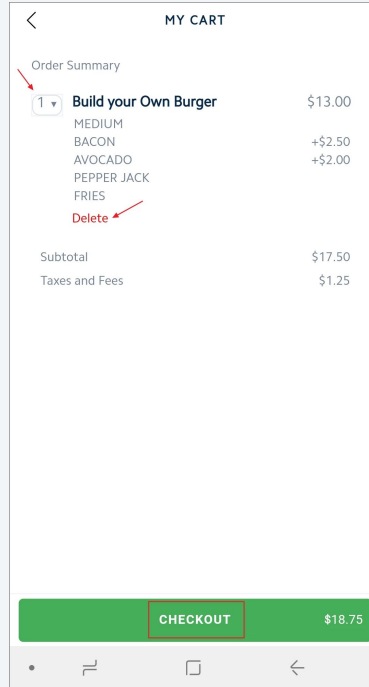


Checking Out

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

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

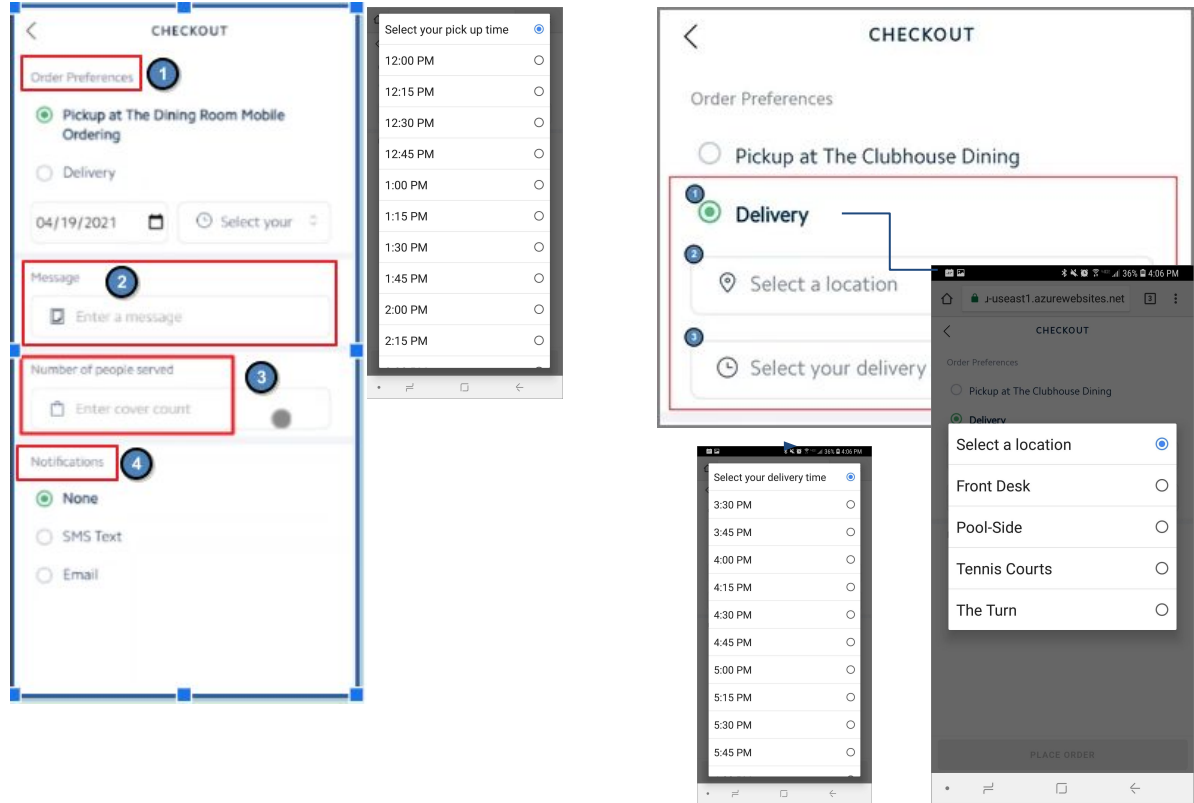
When order is complete, tap **Checkout** to continue.



Order Preferences

(Based on CMA settings)

- Pickup or Delivery (if enabled)
- Date/Time
- Message
- Number of People Served
- Notifications

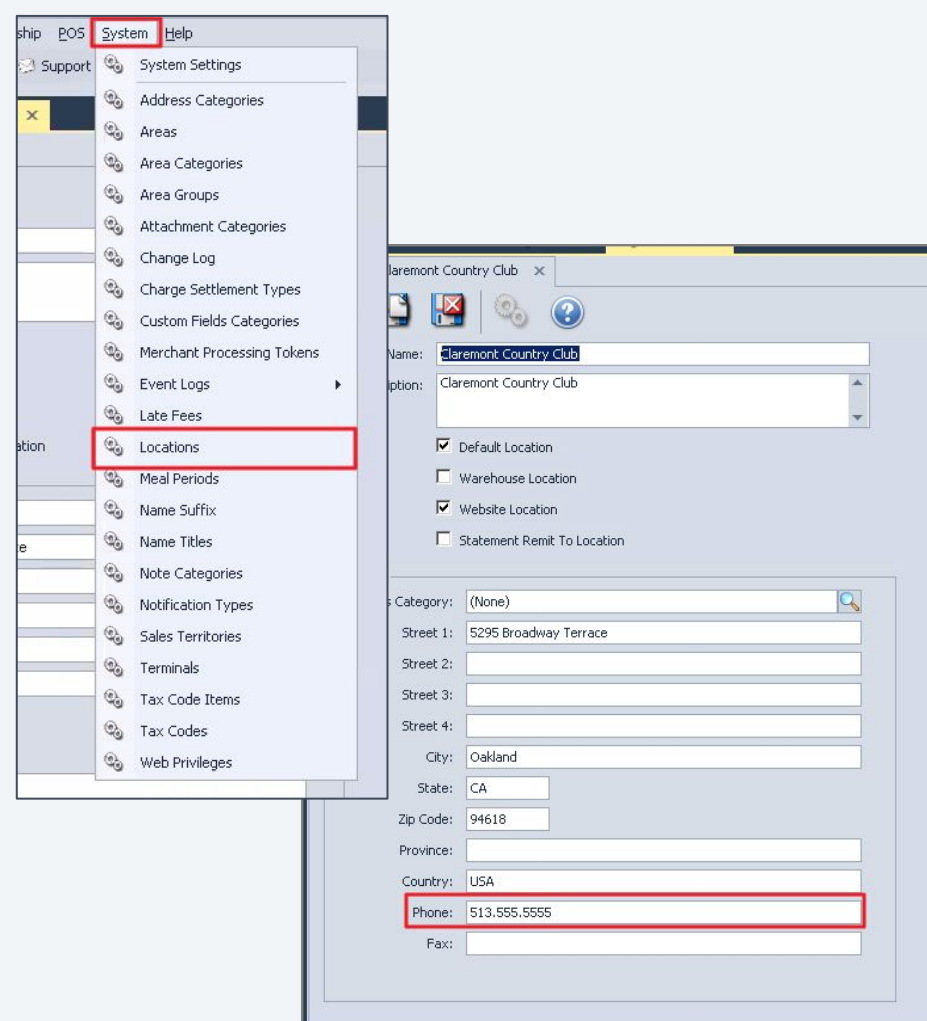


Location Settings

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**.



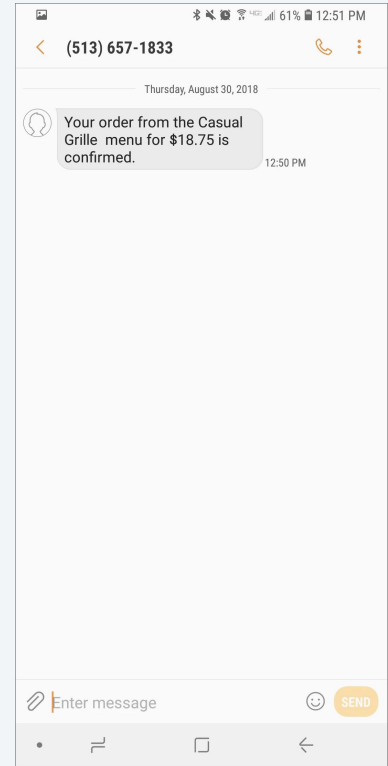
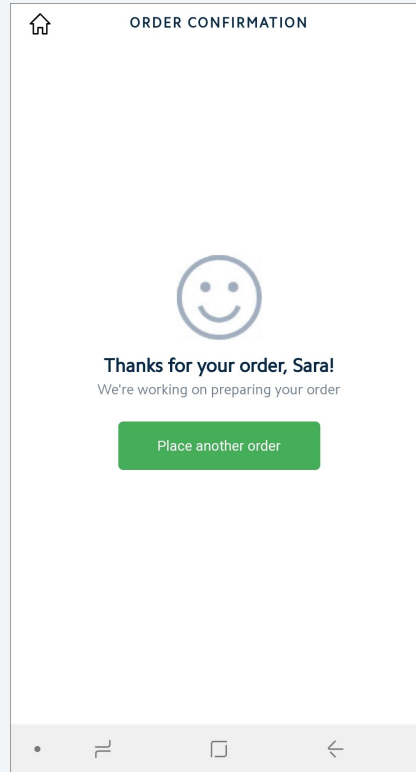
The screenshot displays the Clubessential software interface. On the left, a navigation menu is open, showing a list of settings categories. The 'System' menu item is highlighted at the top, and the 'Locations' option is highlighted with a red box. On the right, the 'Claremont Country Club' location settings form is visible. The 'Name' field contains 'Claremont Country Club' and the 'Option' dropdown is set to 'Claremont Country Club'. Below these are checkboxes for 'Default Location', 'Warehouse Location', 'Website Location', and 'Statement Remit To Location'. The 'Category' dropdown is set to '(None)'. The address fields are filled with: Street 1: 5295 Broadway Terrace, City: Oakland, State: CA, and Zip Code: 94618. The 'Phone' field is highlighted with a red box and contains the number '513.555.5555'.

Confirmation Complete

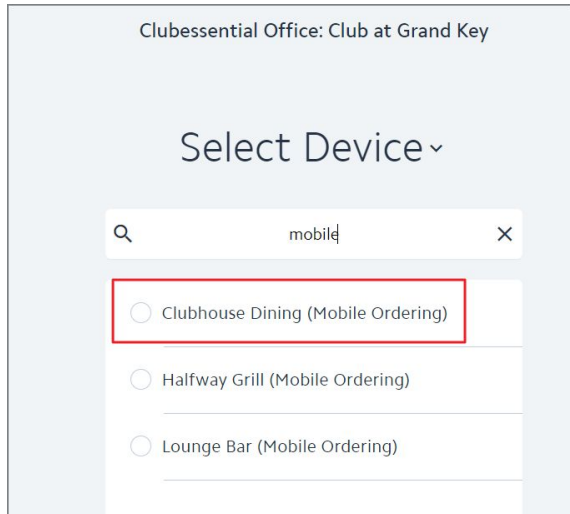
Once the order has been placed, a **Confirmation** on the ordering screen will appear.

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

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



Mobile POS (Terminal Device)

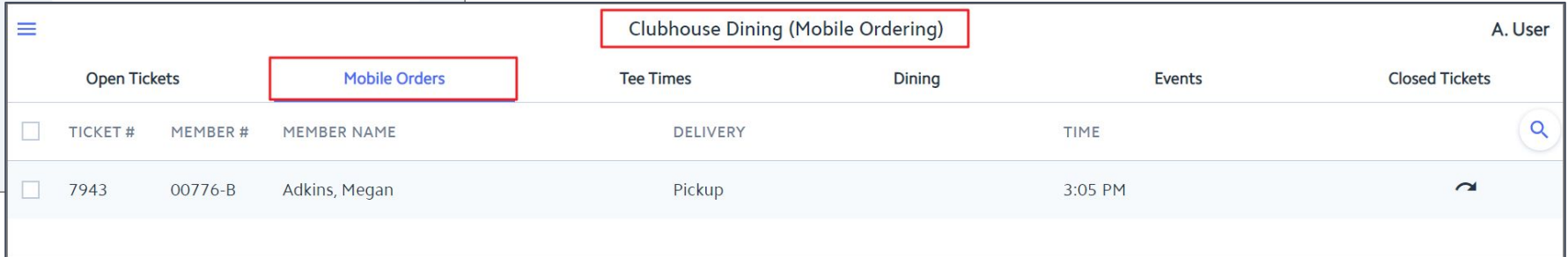


Once the Member completes their order, servers will be able to view the order immediately in [Mobile POS](#).

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](#).



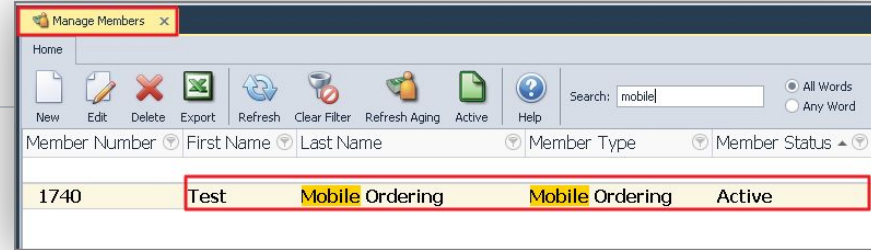
Clubhouse Dining (Mobile Ordering)					A. User
Open Tickets	Mobile Orders	Tee Times	Dining	Events	Closed Tickets
TICKET #	MEMBER #	MEMBER NAME	DELIVERY	TIME	
<input type="checkbox"/>	7943	00776-B	Adkins, Megan	Pickup	3:05 PM

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.



Manage Members

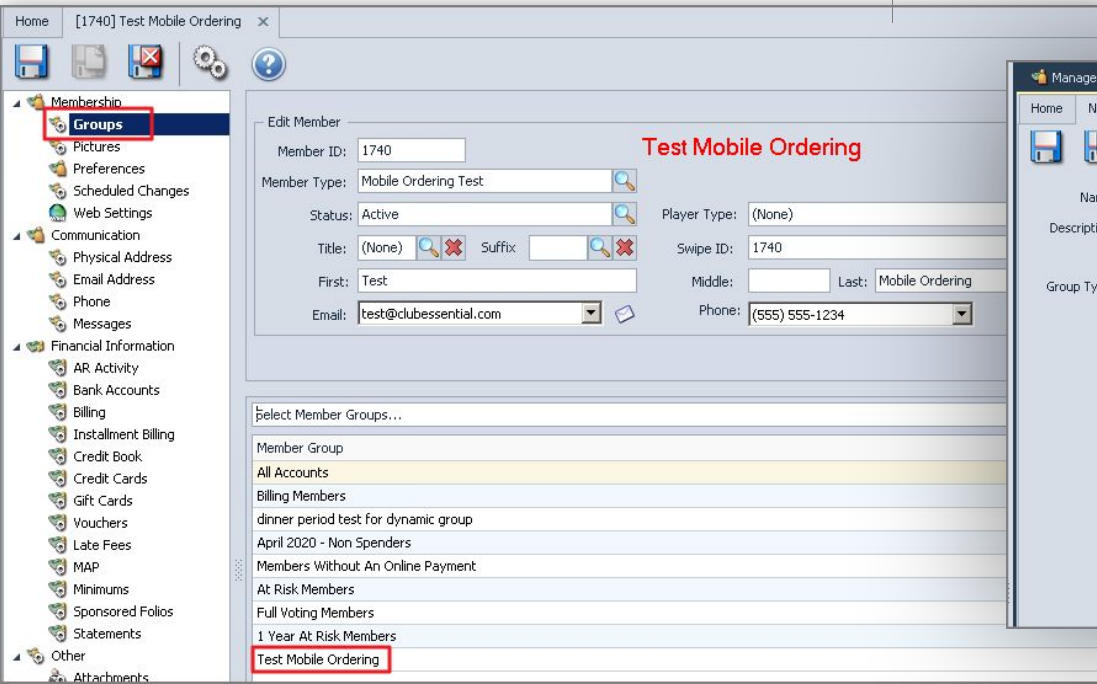
Home

New Edit Delete Export Refresh Clear Filter Refresh Aging Active Help

Search: mobile

All Words Any Word

Member Number	First Name	Last Name	Member Type	Member Status
1740	Test	Mobile Ordering	Mobile Ordering	Active



[1740] Test Mobile Ordering

Membership

- Groups
- Pictures
- Preferences
- Scheduled Changes
- Web Settings

Communication

- Physical Address
- Email Address
- Phone
- Messages

Financial Information

- AR Activity
- Bank Accounts
- Billing
- Installment Billing
- Credit Book
- Credit Cards
- Gift Cards
- Vouchers
- Late Fees
- MAP
- Minimus
- Sponsored Folios
- Statements

Other

- Attachments

Edit Member

Member ID: 1740

Member Type: Mobile Ordering Test

Status: Active

Player Type: (None)

Title: (None) Suffix: (None)

Swipe ID: 1740

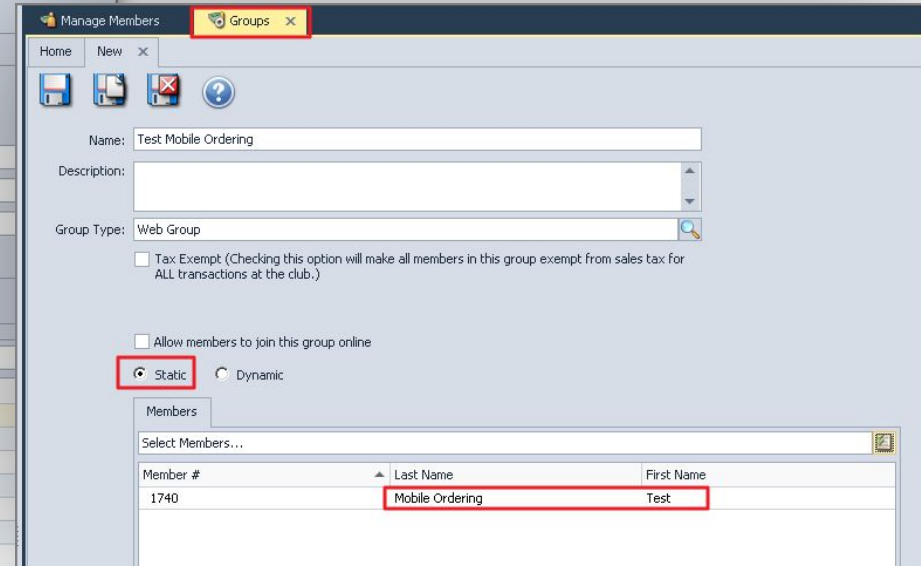
First: Test Middle: Last: Mobile Ordering

Email: test@clubessential.com Phone: (555) 555-1234

Test Mobile Ordering

Select Member Groups...

Member Group
All Accounts
Billing Members
dinner period test for dynamic group
April 2020 - Non Spenders
Members Without An Online Payment
At Risk Members
Full Voting Members
1 Year At Risk Members
Test Mobile Ordering



Manage Members

Groups

Home New

Name: Test Mobile Ordering

Description:

Group Type: Web Group

Tax Exempt (Checking this option will make all members in this group exempt from sales tax for ALL transactions at the club.)

Allow members to join this group online

Static Dynamic

Members

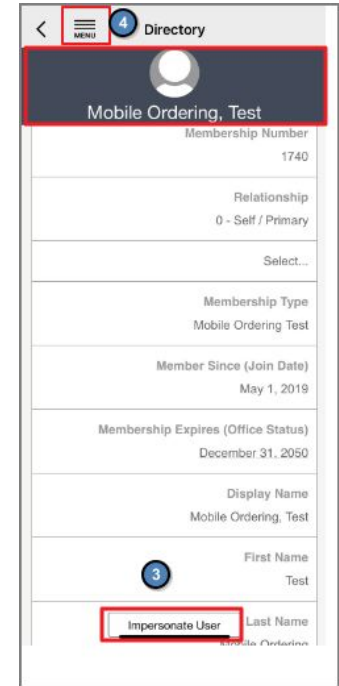
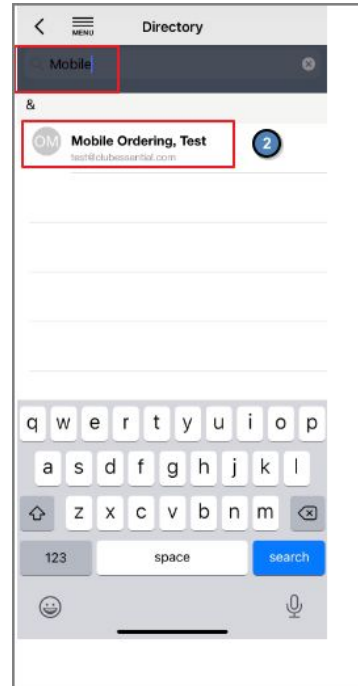
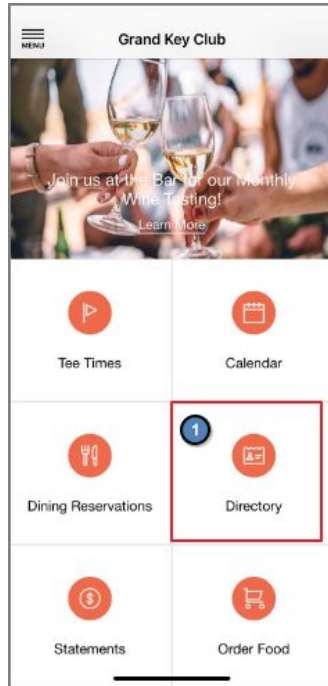
Select Members...

Member #	Last Name	First Name
1740	Mobile Ordering	Test

App-Impersonate Test Member

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

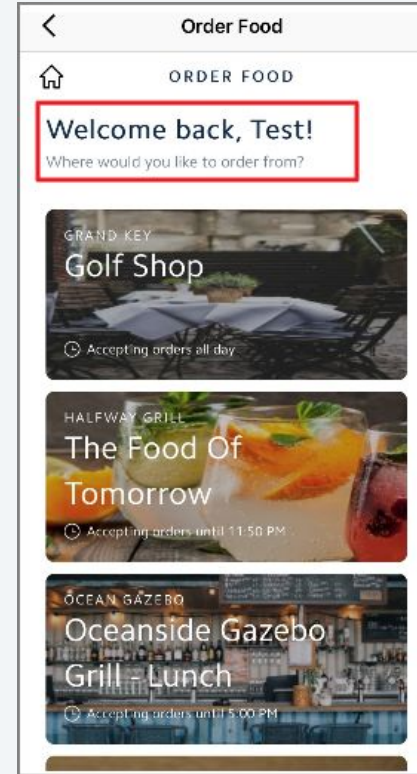
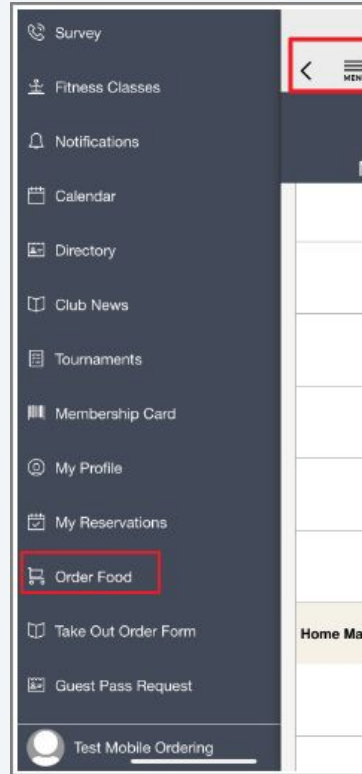
1. Click the **Directory** tile.
2. Search “**Mobile**” to find the **Mobile Ordering Test** member.
3. Open the profile, click the button **To Impersonate User**.
4. Click the **Menu** icon at the top.



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!

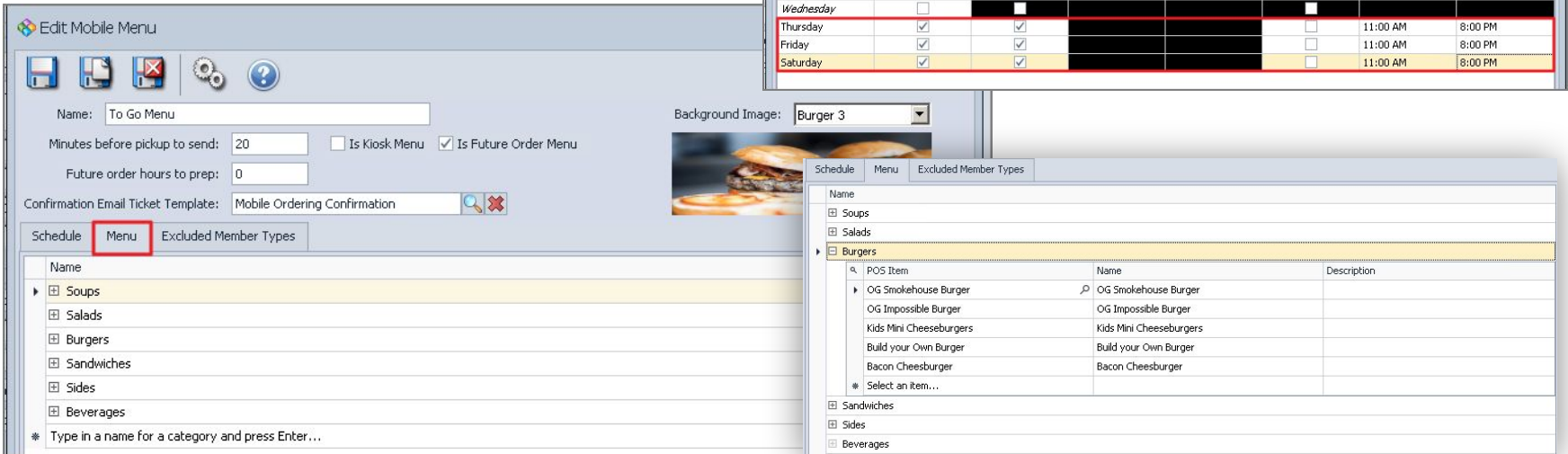
The screenshots illustrate the configuration of a mobile menu for catering. The top window shows the 'Schedule' tab with a table of days and times. The middle window shows the 'Menu' tab with a category tree. The bottom window shows the 'Entrees' category selected, displaying a list of menu items.

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 configuration for a menu named 'To Go Menu'. Key settings include:

- Name: To Go Menu
- Minutes before pickup to send: 20
- Is Kiosk Menu:
- Is Future Order Menu:
- Future order hours to prep: 0
- Confirmation Email Ticket Template: 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 tree view of menu categories:

- Soups
- Salads
- Burgers
 - OG Smokehouse Burger
 - OG Impossible Burger
 - Kids Mini Cheeseburgers
 - Build your Own Burger
 - Bacon Cheeseburger
- Sandwiches
- Sides
- Beverages

Q&A

