



Mobile Ordering

February 17th, 1pm EST



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Questions will be addressed at the end of the webinar.

Visit our Knowledge Base at kb.clubessential.com

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 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.

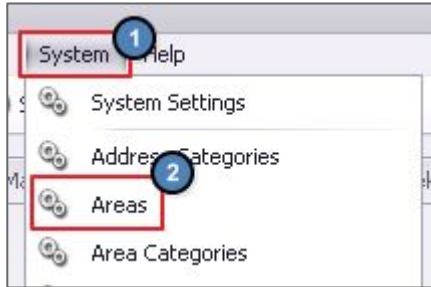
In this webinar, we will discuss:

- 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.

A screenshot of a software configuration window titled 'Areas'. The 'Clubhouse Dining (Mobile Ordering)' area is selected and highlighted with a red box. The 'POS Options' tab is active, and the 'Enable Mobile Ordering' checkbox is checked and highlighted with a red box. The 'Area Information' section on the right shows details for the selected area, including Name, Description, Screen Group, Active Layout, Tab Payment, and Cloud SG. The 'POS Options' 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 'Enable Mobile Ordering' checkbox is checked and highlighted with a red box. The 'Gratuity Override' field is set to '(None)'.

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.

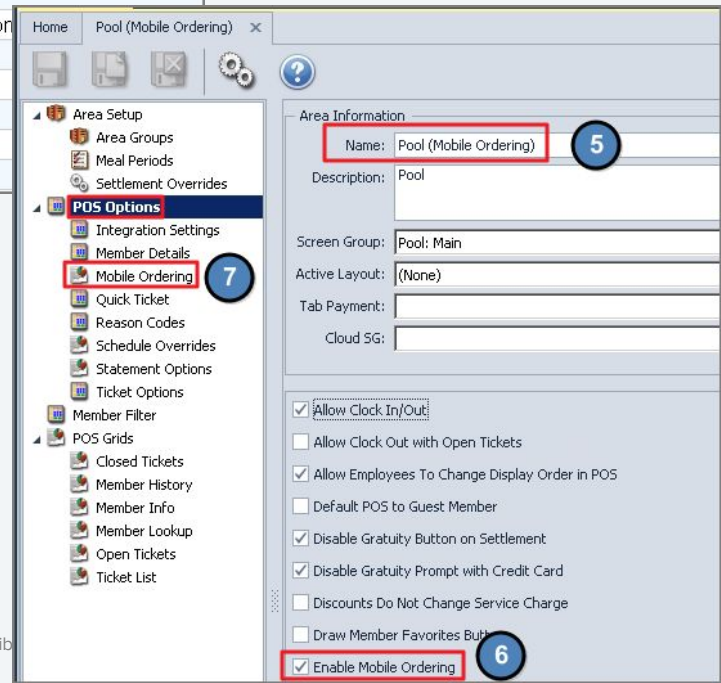
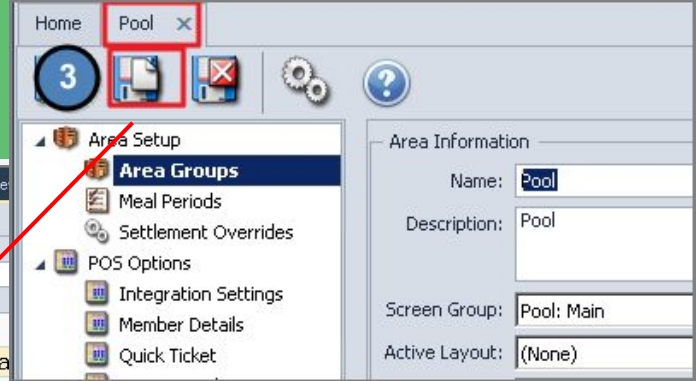
Create a New Area-Save and New

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.

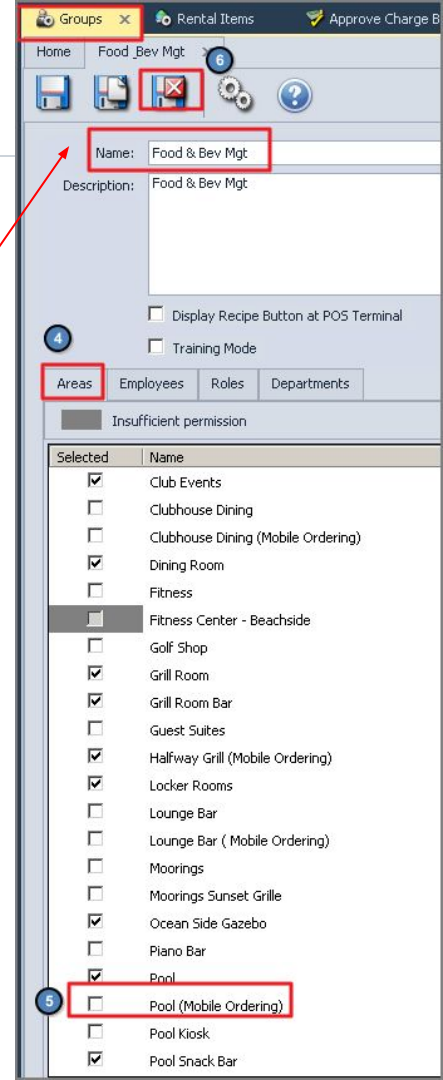
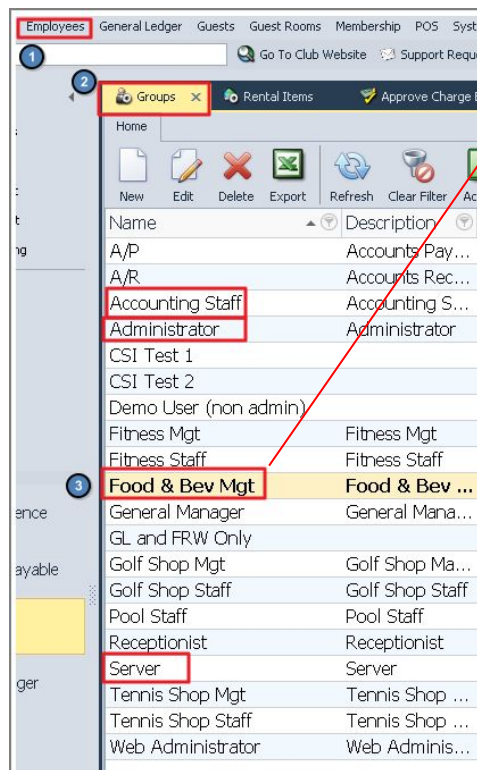
The screenshot shows the 'Manage Employees' interface for a user named 'User, Administrative'. The left sidebar contains a tree view with 'Security' expanded and 'Areas' selected. The main area shows the 'Employee Information' form with fields for First, Middle, Last, Email, and Phone. Below the form is a table of areas with checkboxes for selection. The 'Pool (Mobile Ordering)' area is highlighted with a red box and a circled '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**:

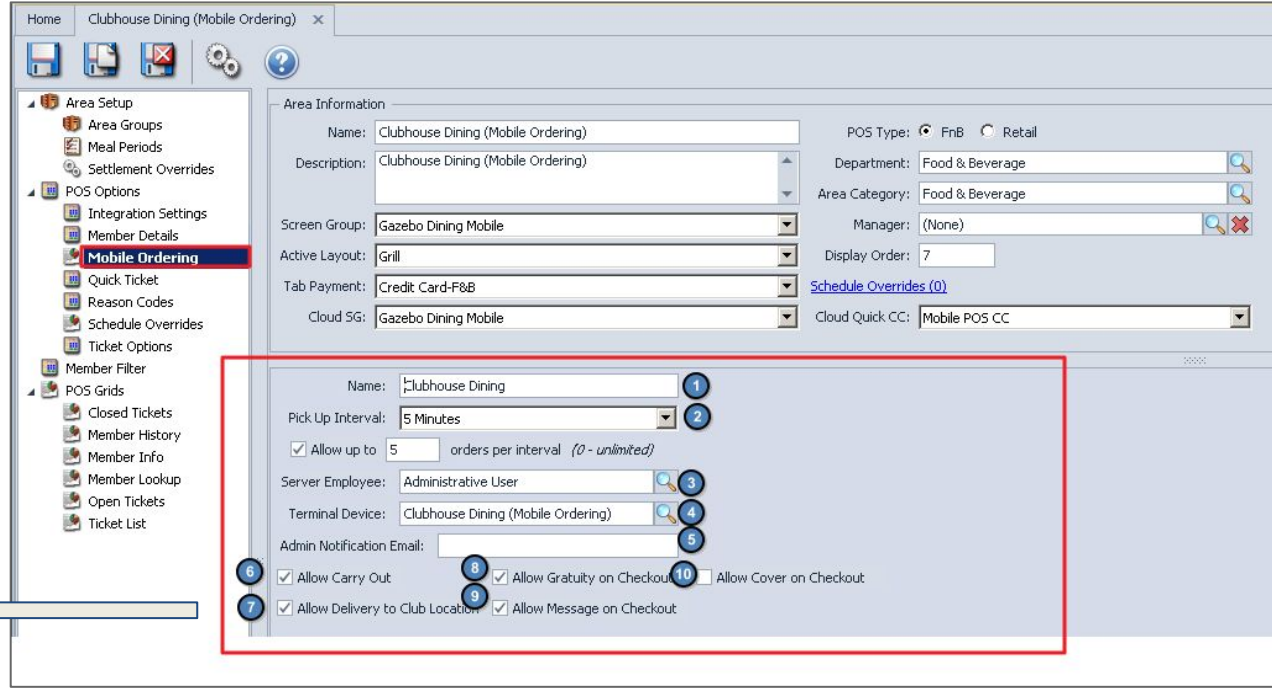
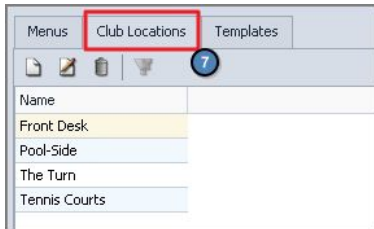
1. Go to **Employees** across the top.
2. Select **Groups**.
3. Select any applicable F&B Group, Server, Admin or Accounting Group.
4. Under the **Areas** tab, place a check next to the new Mobile Ordering Area.
5. **Save and Close**.



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

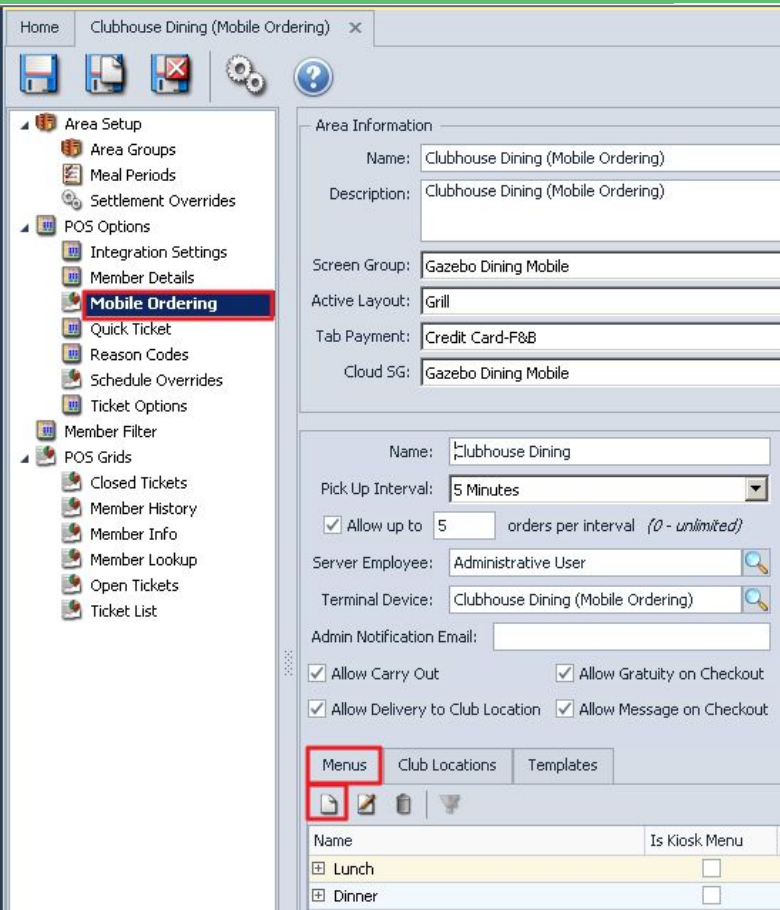
Terminal Device: Clubhouse Dining (Mobile Ordering) 4

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:

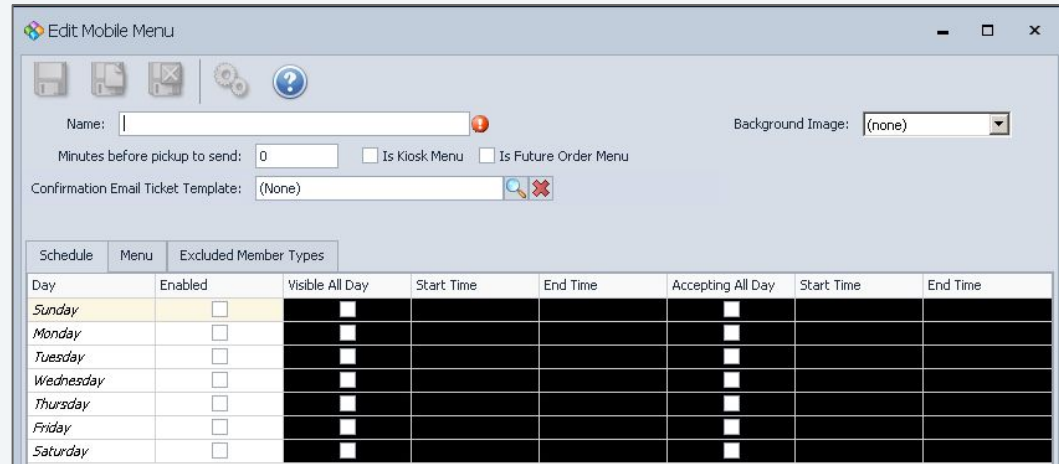
Allow Carry Out Allow Gratuity on Checkout

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

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

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

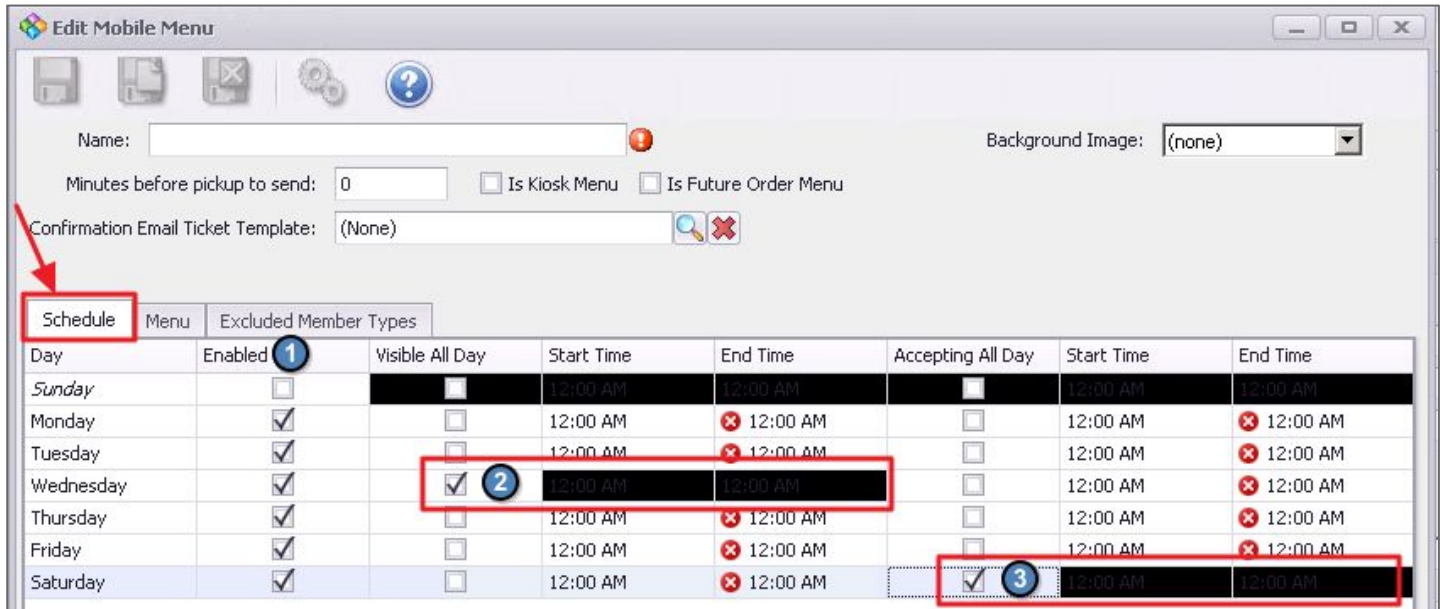
Confirmation Email Ticket Template: 5

6 Background Image:

Schedule	Menu	Excluded Member Types	Day	Enabled	Visible All Day	Start Time	End Time	Accepting All Day	Start Time	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*



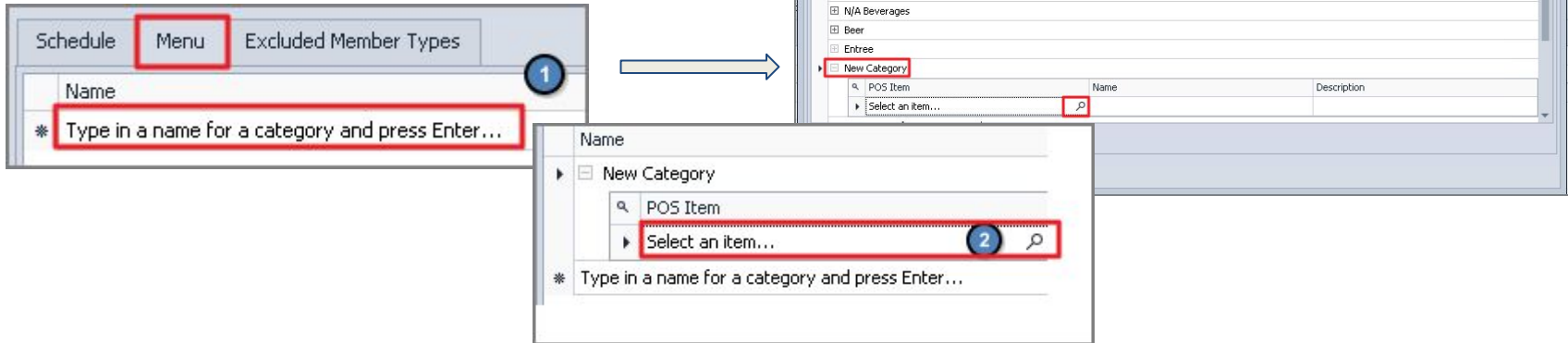
The screenshot shows the 'Edit Mobile Menu' window with a table of menu items. The table has the following columns: Day, Enabled, Visible All Day, Start Time, End Time, and Accepting All Day. The rows represent the days of the week. Red boxes and numbers 1, 2, and 3 highlight the 'Enabled', 'Visible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

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.



The screenshot shows the 'Edit Mobile Menu' application window. The 'Menu' tab is selected, and the 'Appetizers' category is highlighted. A search icon is visible in the bottom right of the item list. A callout box labeled '1' points to the 'Menu' tab and the search icon. A second callout box labeled '2' points to the search icon in the 'New Category' section.

1

Schedule **Menu** Excluded Member Types

Name

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

2

Name

▶ New Category

POS Item

Select an item...

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

Edit Mobile Menu

Name: Lunch

Minutes before pickup to send: 15 Is Kiosk Menu Is Future Order Menu

Background Image: Dining Room 7

Confirmation Email Ticket Template: (None)

Schedule **Menu** Excluded Member Types

Name	Name	Description
▶ Appetizers		
POS Item		
▶ Onion Soup	Onion Soup	Try a warm bowl of Grandkey's classic Onion Soup
Tuna Tacos	Tuna Tacos	Three crisp sushi grade tuna tacos, jicama, ginger
Beef Sliders	Beef Sliders	Black Angus Beef Sliders with bacon, Swiss
Shrimp Cocktail	Shrimp Cocktail	Junbo Shrimp Cocktail, Delicious wild shrimp
Pulled Pork Sliders	Pulled Pork Sliders	Hickory-smoked pulled pork sliders, topped with
Buffalo Wings (12)	Buffalo Wings (12)	Seasoned Chicken Wings tossed in our signature
* Select an item...		
▶ Entrees		
▶ Salads		
▶ N/A Beverages		
▶ Beer		
▶ Entree		
▶ New Category		
POS Item		
Select an item...		

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 is 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 header, with the 'Remove This Column' option 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

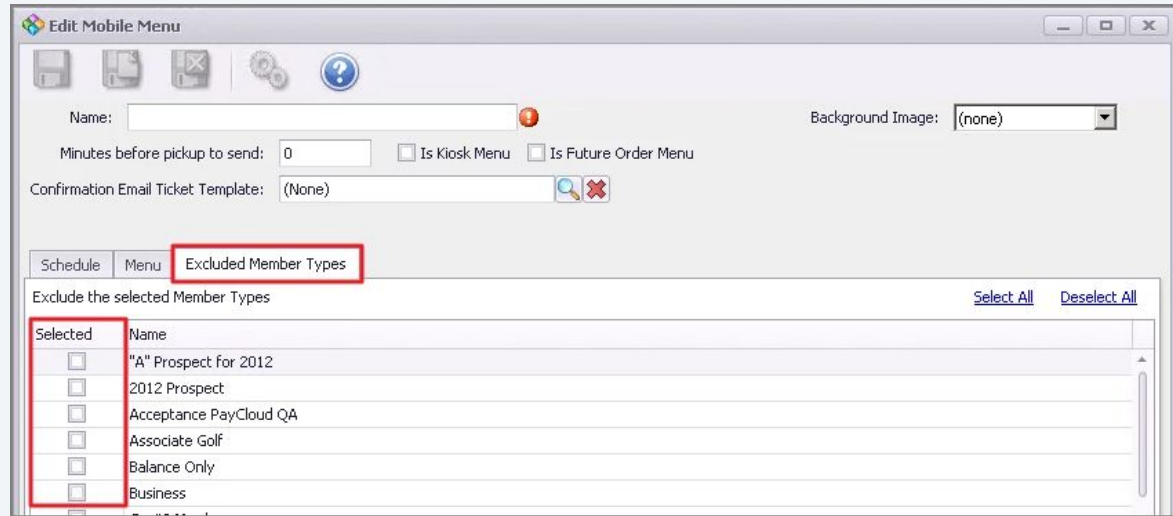
[Item Category] = 'Appetizers' And [F&B Item] = 'Checked' And [Active] = 'Checked' Edit Filter

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

77 of 3600 rows selected. Select Cancel

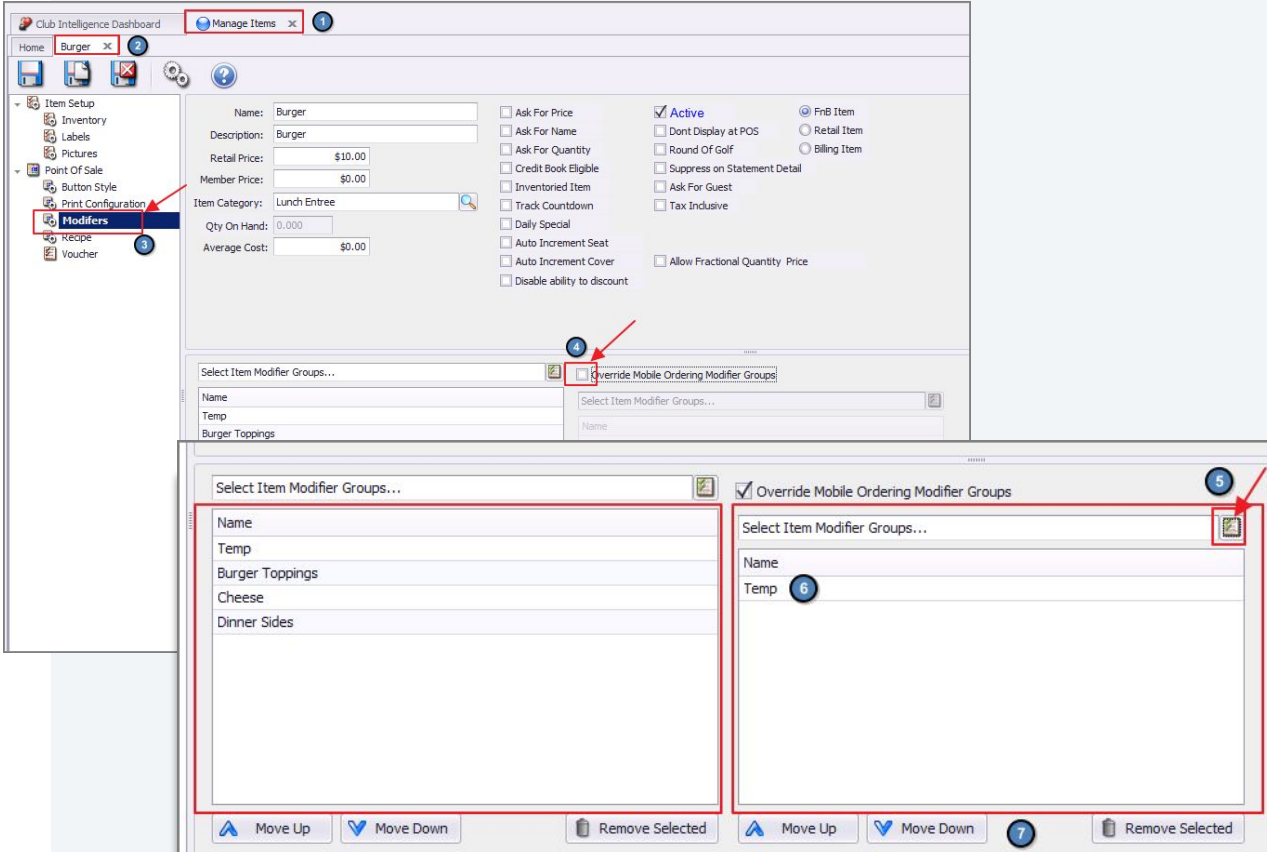
Excluded Member Type

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



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.



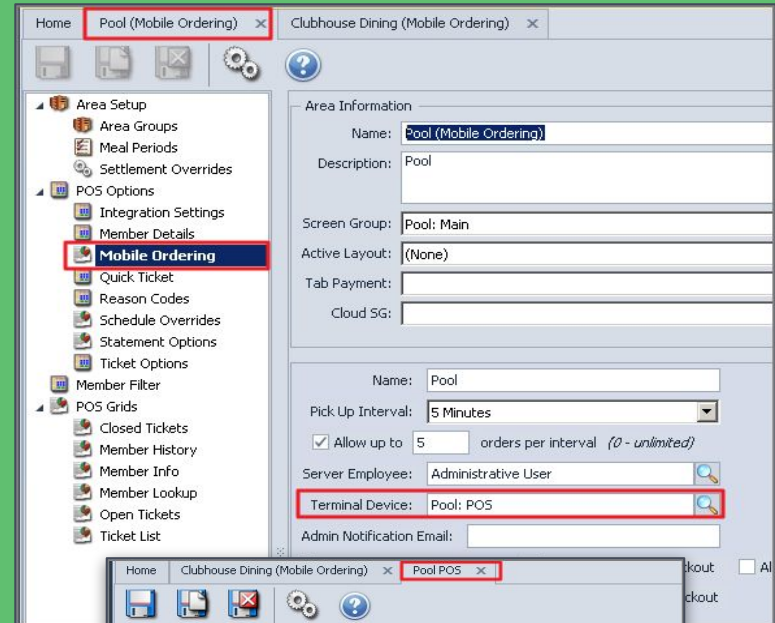
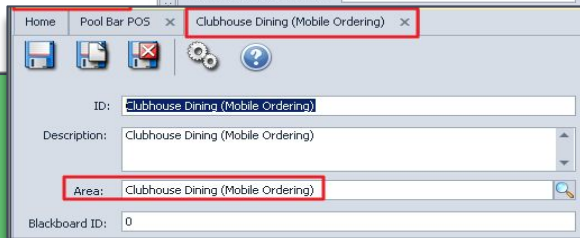
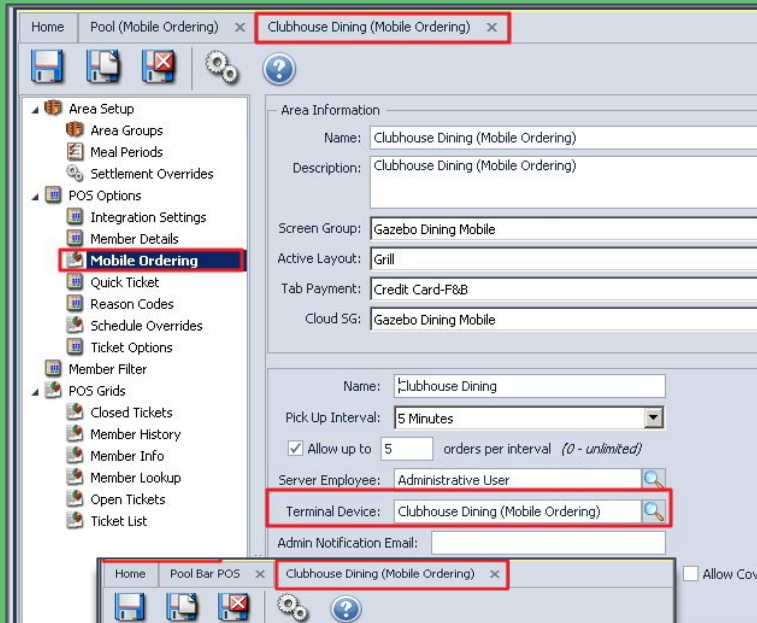
The screenshot displays the 'Manage Items' interface for a 'Burger' item. The left sidebar shows the 'Modifiers' option selected. The main area displays item details and configuration options. A red box highlights the 'Override Mobile Ordering Modifier Groups' checkbox. Below this, two windows are shown: the left one lists modifier groups like 'Burger Toppings', 'Cheese', and 'Dinner Sides'; the right one shows a selected group with 'Temp' selected. Red arrows and numbered circles (1-7) indicate the sequence of steps for editing modifiers.

Device Settings



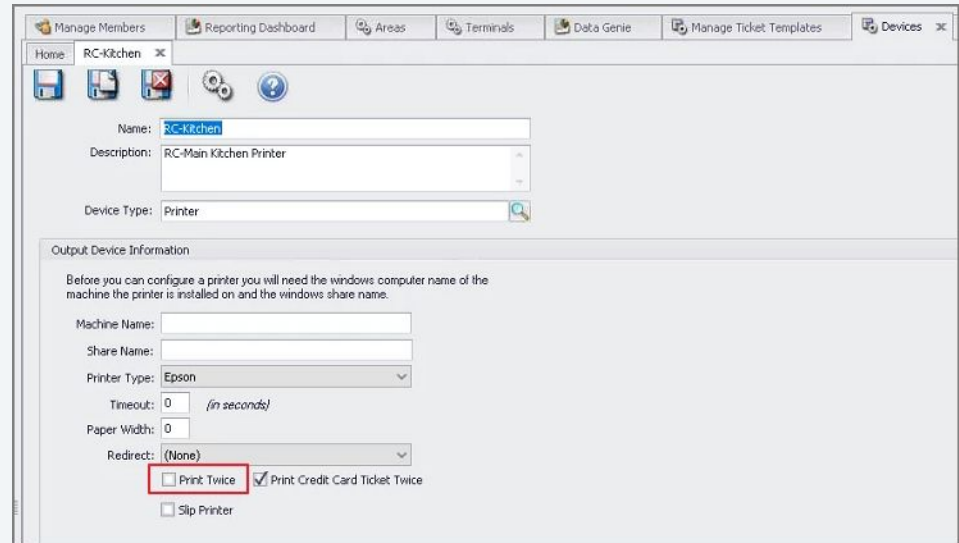
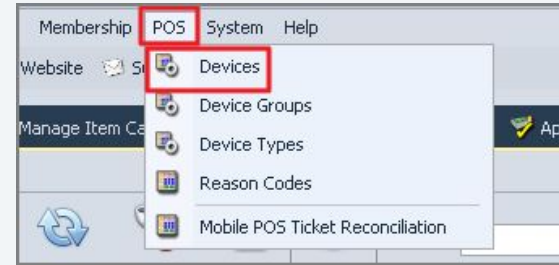
Terminal Devices

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

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

Edit POS Item Category

Name: Fountain Drinks

Description:

Ticket Message: (None)

Item Group: F&B: Bar Beverage

Percent Cost: 0

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

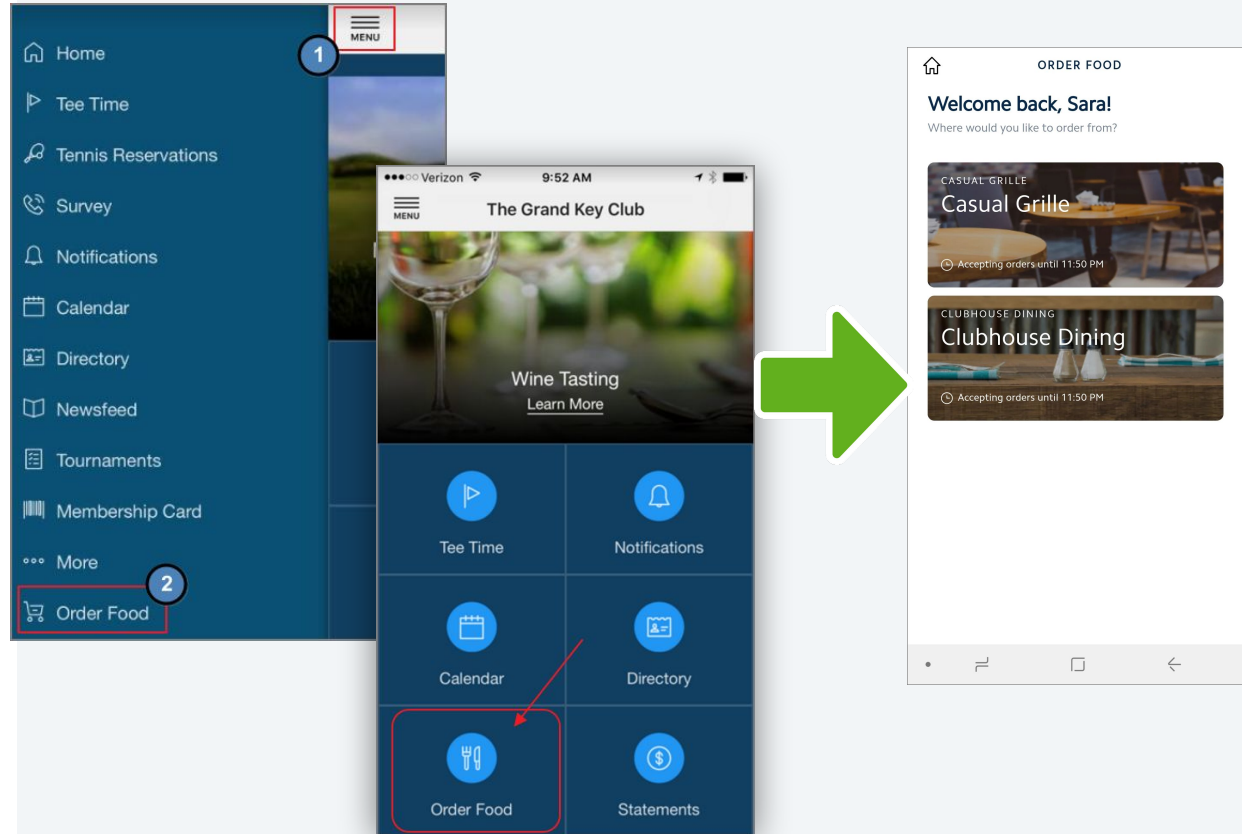


Member Access

Mobile Ordering on the App

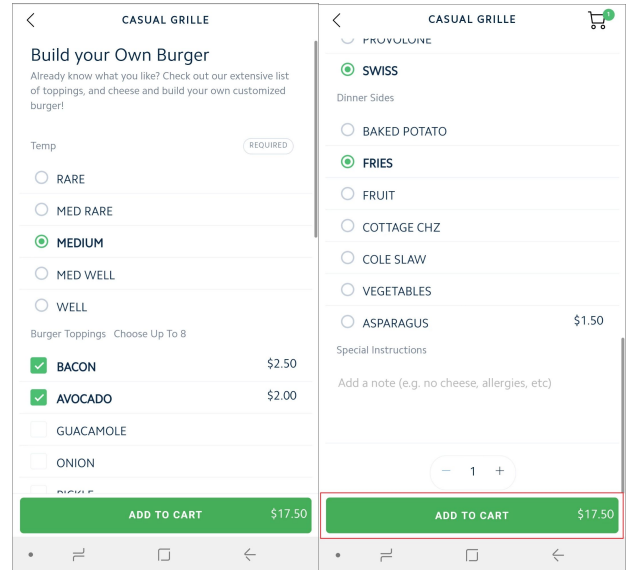
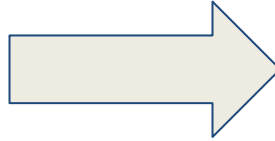
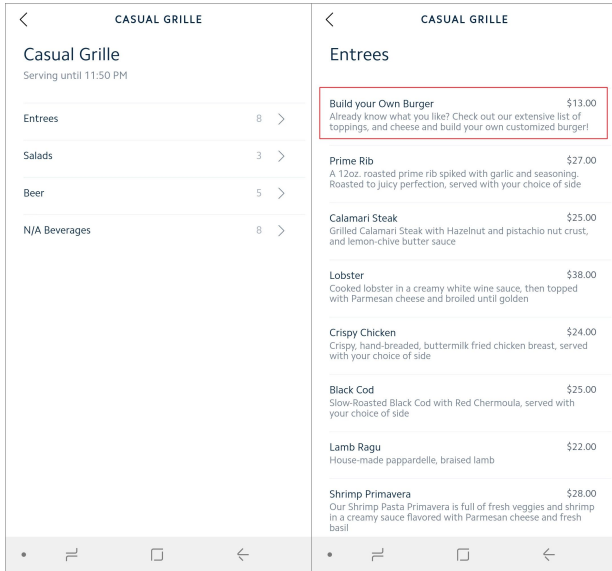
Two ways to Order:

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.

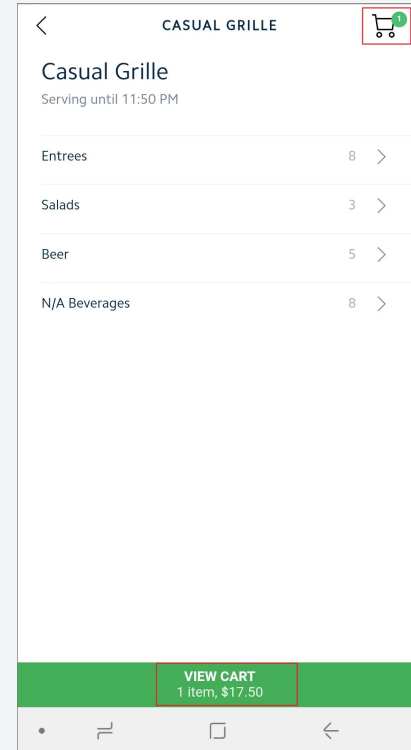
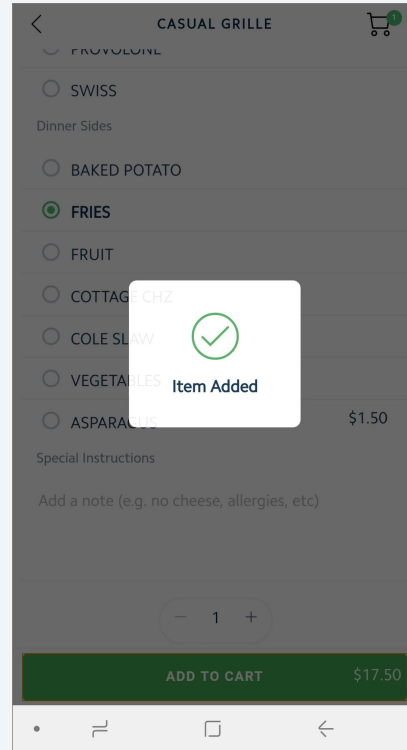
Order Confirmation

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.

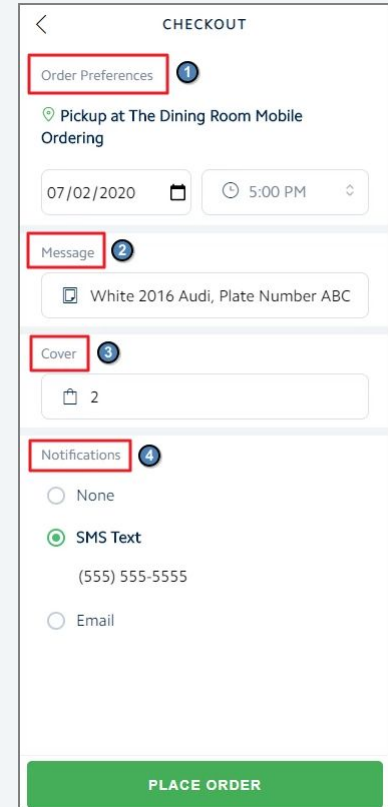
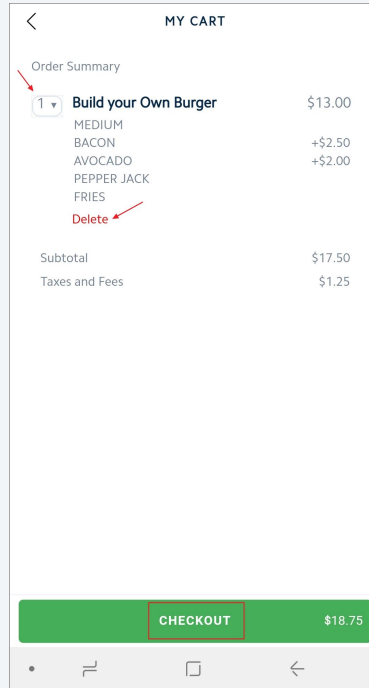


Checking Out

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

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

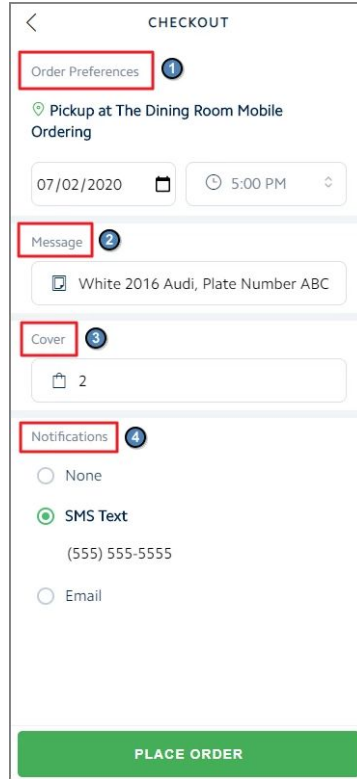
When order is complete, tap **Checkout** to continue.



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

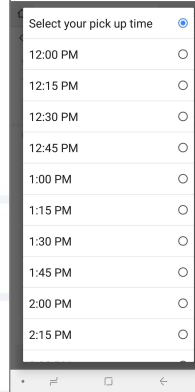
None

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

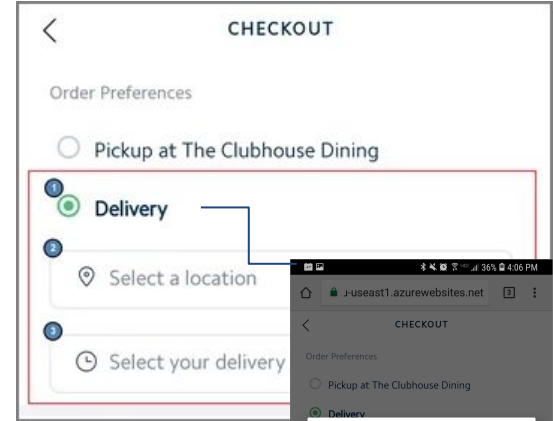
1:15 PM

1:30 PM

1:45 PM

2:00 PM

2:15 PM



CHECKOUT

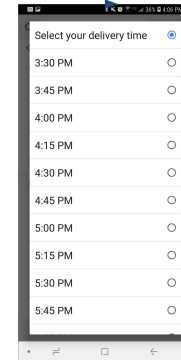
Order Preferences

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

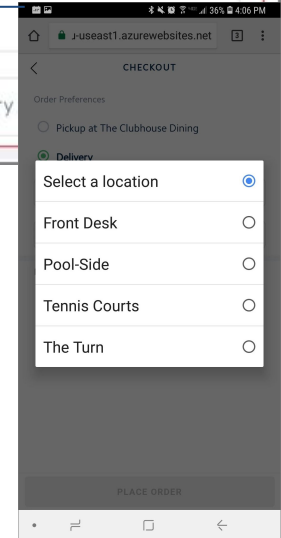
4:45 PM

5:00 PM

5:15 PM

5:30 PM

5:45 PM



CHECKOUT

Order Preferences

Pickup at The Clubhouse Dining

① Delivery

Select a location

Front Desk

Pool-Side

Tennis Courts

The Turn

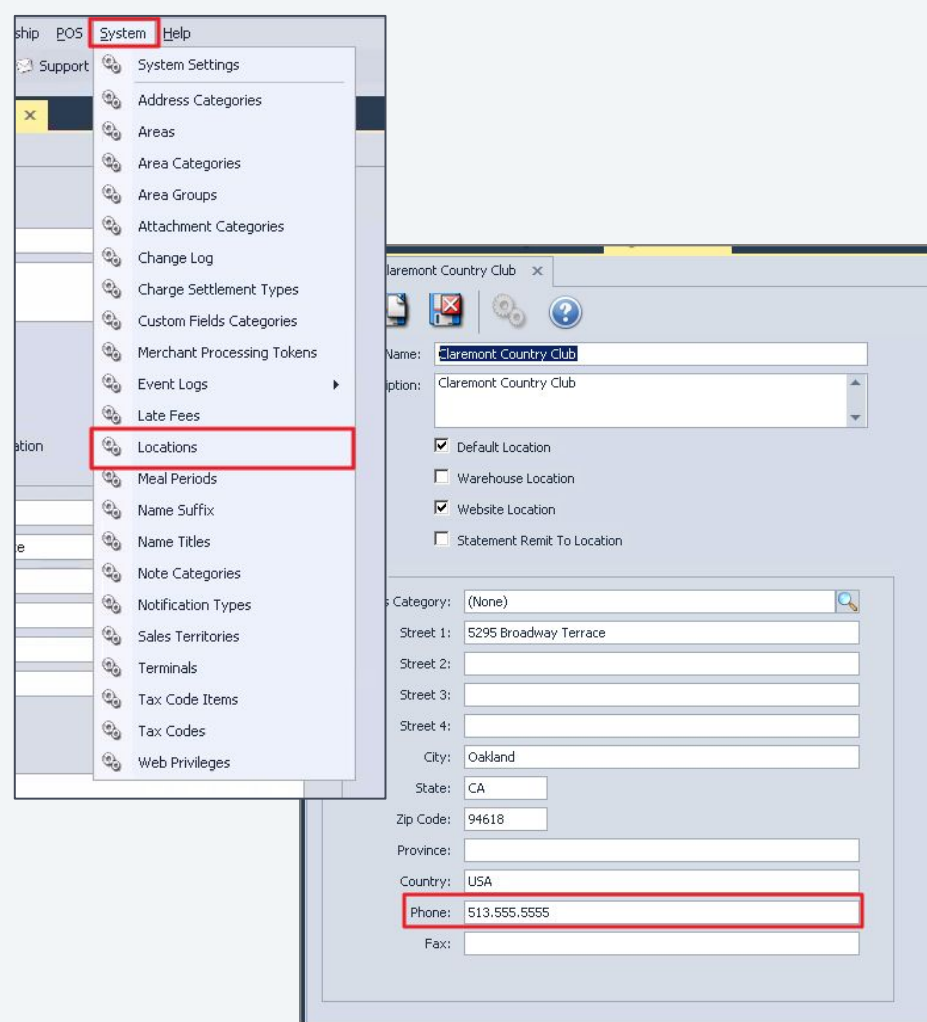
PLACE ORDER

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**.



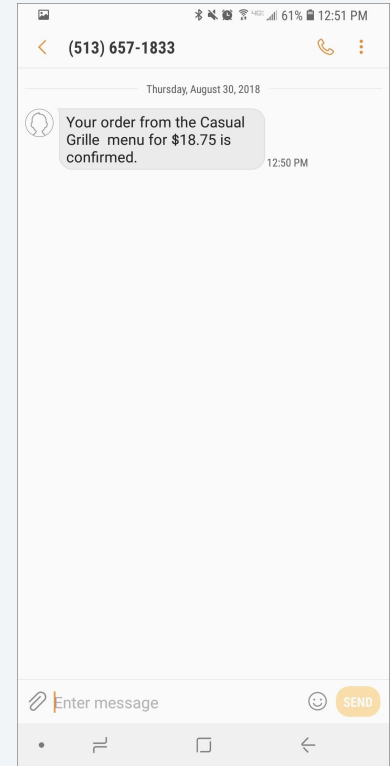
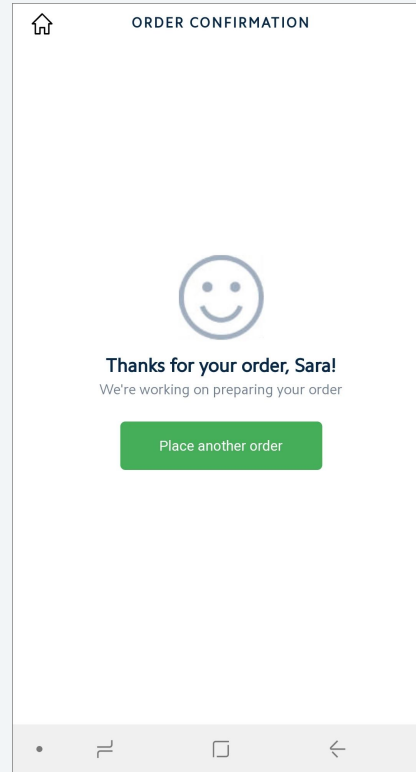
The screenshot displays the Clubessential software interface. On the left, a navigation menu is open, showing a list of system settings. The 'System' menu item is highlighted at the top, and the 'Locations' option is selected and highlighted with a red box. On the right, the 'Claremont Country Club' location settings page is visible. The 'Name' field is filled with 'Claremont Country Club'. Below this, there are checkboxes for 'Default Location', 'Warehouse Location', 'Website Location', and 'Statement Remit To Location'. The 'Website Location' checkbox is checked. 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 'Country' field is set to 'USA'. The 'Phone' field is filled with '513.555.5555' and is highlighted with a red box. The 'Fax' field is empty.

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](#).

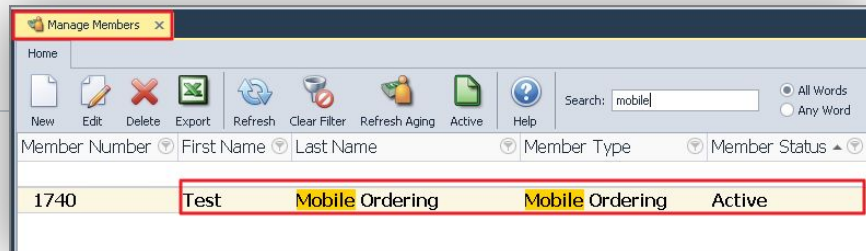
Clubhouse Dining (Mobile Ordering)							A. User
Open Tickets	Mobile Orders			Tee Times	Dining	Events	Closed Tickets
<input type="checkbox"/>	TICKET #	MEMBER #	MEMBER NAME	DELIVERY	TIME		<input type="checkbox"/>
<input type="checkbox"/>	7943	00776-B	Adkins, Megan	Pickup	3:05 PM		<input type="checkbox"/>

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.



Manage Members

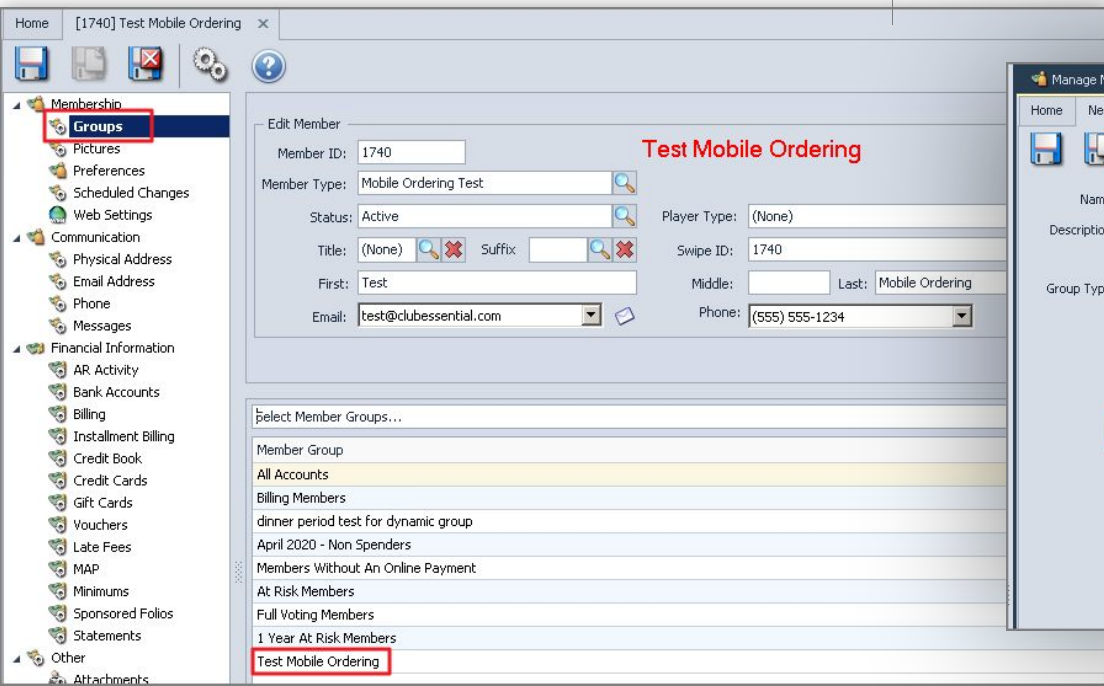
Home

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

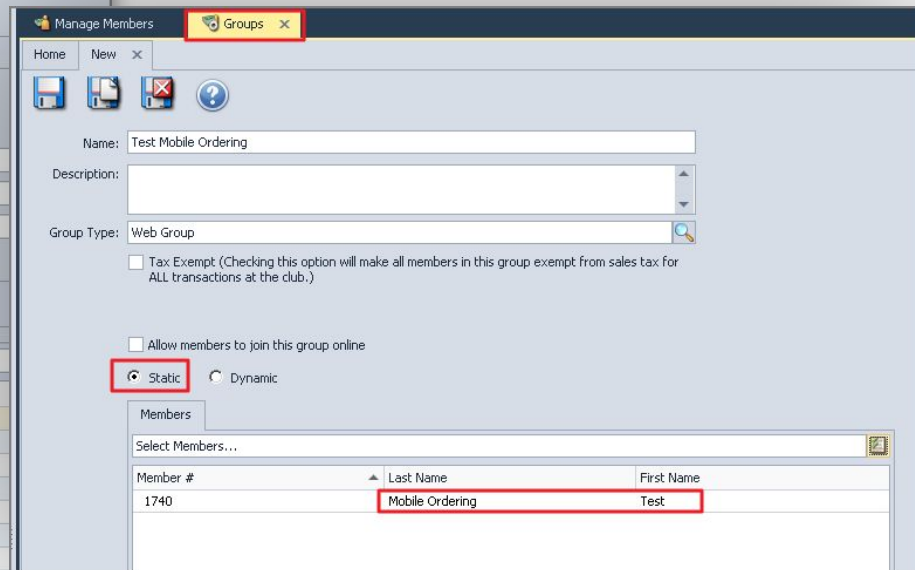
First: Test Middle: Last: Mobile Ordering

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

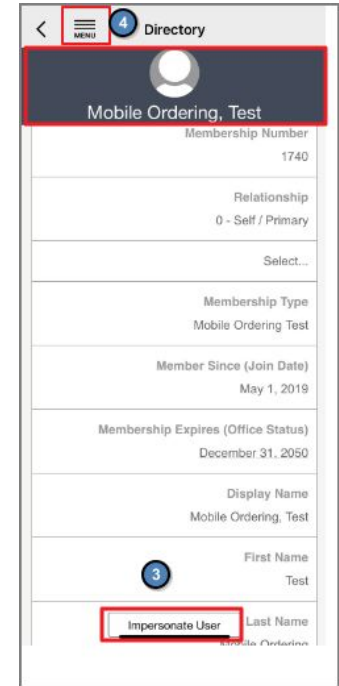
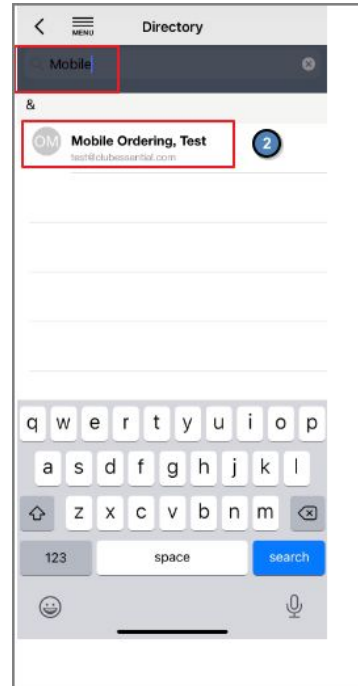
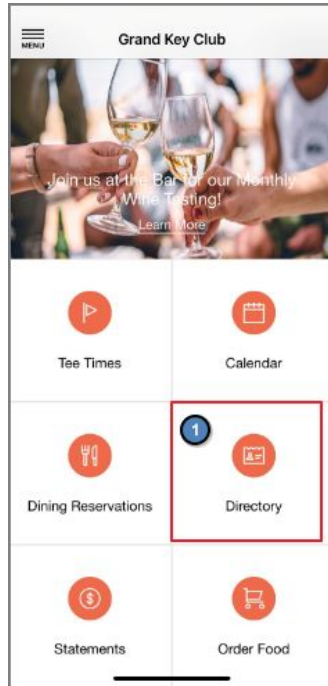
Select Members...

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).

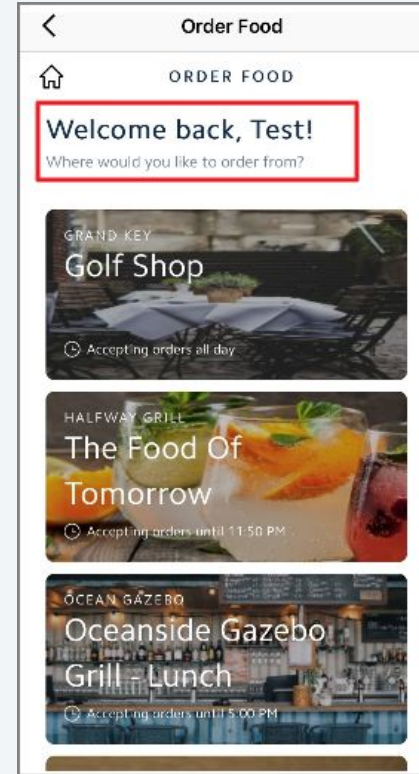
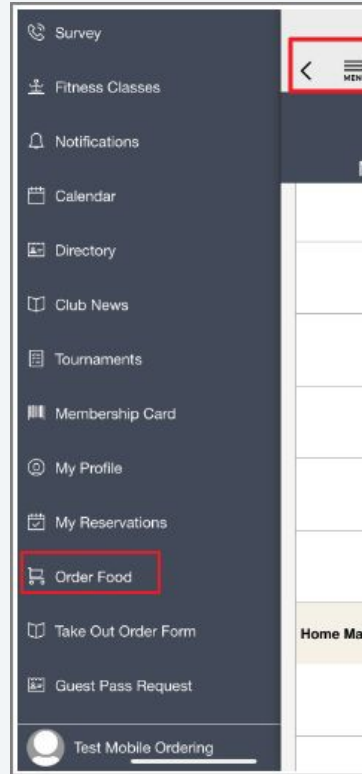
1. Click the **Directory** tile.
2. Search “**Mobile**” to find the **Mobile Ordering Test** member.
3. Open the profile, click the button **To Impersonate User**.
4. Click the **Menu** icon at the top.



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 the following table:

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"/>		

The middle window shows the 'Menu' tab with a category tree where 'Entrees' is selected. The bottom window shows a list of entree items with 'Pork Tenderloin' highlighted:

POS Item	Name	Description
<input type="checkbox"/>	Filet Of Beef Asada Tacos	Filet Of Beef Asada Tacos
<input type="checkbox"/>	Chicken Enchiladas	Spicy Chicken Enchiladas
<input type="checkbox"/>	Tuna Tacos	Tuna Tacos
<input type="checkbox"/>	Seared Salmon	Pan Seared Salmon
<input type="checkbox"/>	Roasted Duck	Roasted Duck
<input type="checkbox"/>	Ravioli	Fresh Made Spinach and Cheese Ravioli
<input checked="" type="checkbox"/>	Pork Tenderloin	Roasted Pork Tenderloin
<input type="checkbox"/>	Select an item...	

Can't dine in? No Problem!

Provide your members with To-Go Options!

Edit Mobile Menu

Name:

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

Future order hours to prep:

Confirmation Email Ticket Template:

Schedule **Menu** Excluded Member Types

- Soups
- Salads
- Burgers
- Sandwiches
- Sides
- Beverages

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

Edit Mobile Menu

Name:

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

Future order hours to prep:

Confirmation Email Ticket Template:

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 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

Background Image:

Schedule **Menu** Excluded Member Types

Name

- Soups
- Salads
- Burgers

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	
- Sandwiches
- Sides
- Beverages

Q&A

