Office - 12.17.18 Release

User Guide - Table of Contents

Enhancements

Accounts Payable

Batch Preview

● **Added additional consistency checks when previewing and posting Batches in CMA.**

Use Case: Previously, Users were able to preview a Batch, then make changes, but the changes would not be posted. Now, if Users leave a Batch in preview mode, make changes that impact the batch and then try to post it, they are prevented from doing so, with a working message, until the batch is updated and previewed again.

Interactive Reporting

Guest Room Housekeeping Report

● **New Guest Room Housekeeping Report has been added that details New Arrivals, Departures, Turnover, and Stay Overs for any given day.**

Use Case: Previously, the Reporting Dashboard did not include a detailed breakdown of the New Arrivals, Departures, Turnovers, and Stay Overs for Guest Rooms. Now, with the new Guest Room Housekeeping Report, Users can see when Members arrive, depart, or if there are changes in the length of their stay, for any given period of time.
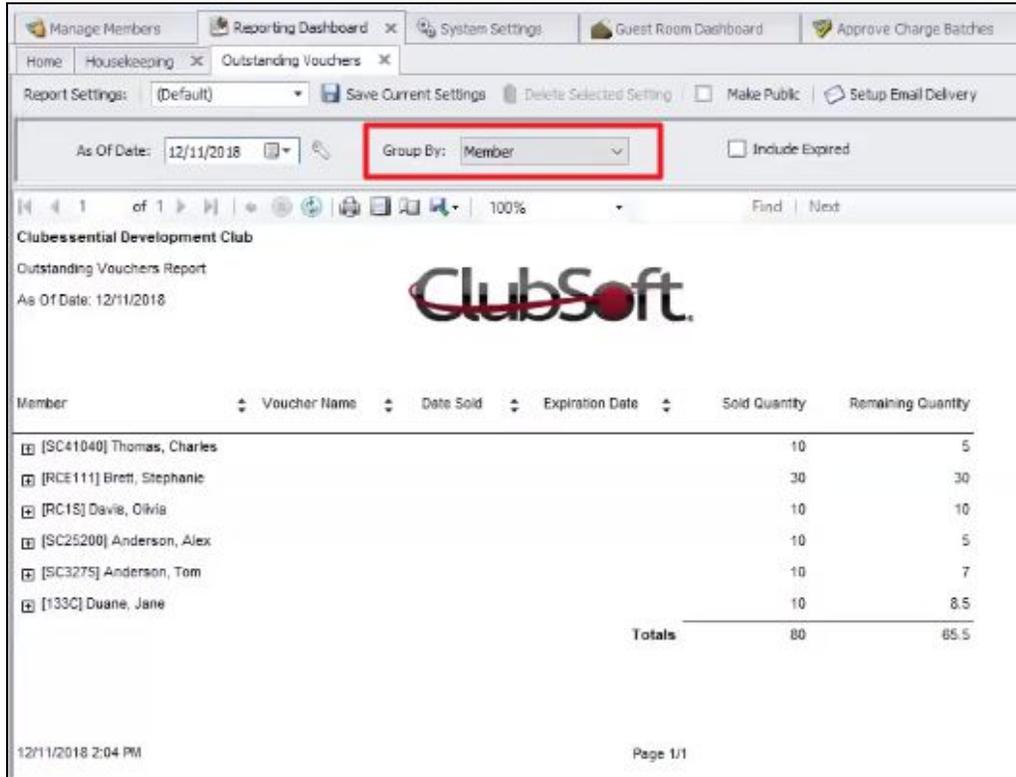
Outstanding Voucher Report

- **New Outstanding Vouchers Report has been added that shows all outstanding Vouchers as of a specific date.**

  Use Case: Previously, the functionality did not exist to see a report of all outstanding Vouchers. Now, the new Outstanding Vouchers Report shows all outstanding Vouchers as of a date chosen by the User. This report functions similarly to the Outstanding Credit Book Report and the Outstanding Gift Card Report. This report can be grouped by Member or by Voucher, as seen below.

  Member:

When viewing Vouchers by Member, the Member will be listed and the line can be expanded to see all Vouchers associated with that Member.
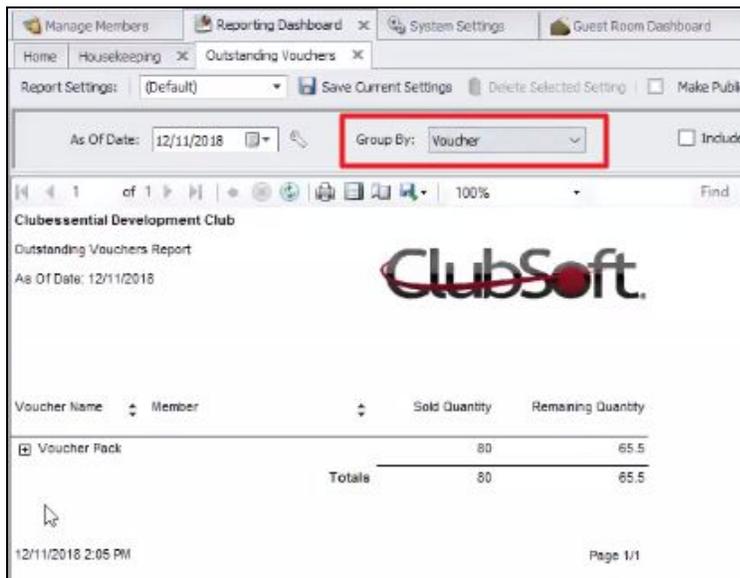

Voucher:

When viewing by Voucher, the line can be expanded to show each Member that has that specific Voucher.

Marketing - Templates

- **Enhanced features in the Marketing Template Editor allows for Users to add a Total Statement Snippet.**

  Use Case: Previously, Total Statement snippets were unavailable when sending a Statement Email to a Member. Now, a new snippet has been added for Users to include in the Statement Email to the Member that will show the Member their Total Statement Balance.
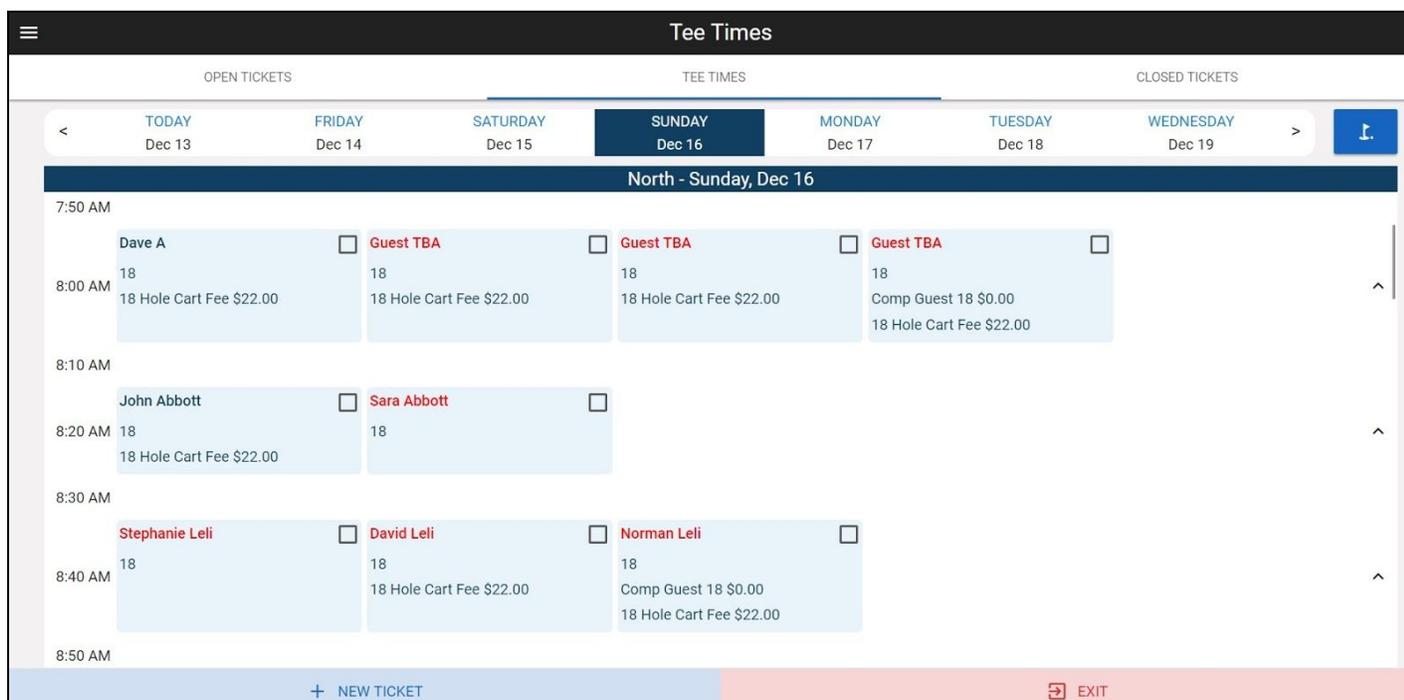
Mobile POS (Pilot Clubs Only)

Please Note: These changes only affect Clients **piloting the Mobile POS program**.

Tee Sheet Integration

- **Enhanced Tee Sheet Integration; displaying the Reserver of the group, differentiating between Guests and Members by font color, and various other changes.**

  Please Note: This only affects clients piloting the Mobile POS Admin Tee Times Check In feature.

  Use Case: Tee times made in the Clubessential Tee Sheet can now display in Mobile POS for Staff to Member charge or open a ticket from their tablet and email the Member a receipt if they choose, facilitating check in/charging from the 1st tee.

Advanced Split

- **Enhanced Advance Split capabilities for Tickets in Mobile POS.**

    Use Case: Previously, when a ticket had no items, it would need to be deleted. Now, the system recognizes when a Ticket has no items (a zero balance), and will delete the Ticket automatically.

The first Ticket shown below, ticket #387, no longer has any items left after the split.

When reviewing the Tickets to close or cash out, Ticket #387 no longer exists, it has been deleted due to a zero balance.

Bug Fixes

- Fixed an issue with Approving Payment Batches occurring when the transaction date was changed, the Vendor Invoice paid date remained the same.

- Fixed an issue where statement data would not appear in PayCloud for clubs with a unique Statement Month Ending Day.

- Fixed an issue where the quick Cash settlement button in Mobile POS would not respect area-level settings.

- Fixed an issue when overpaying for a ticket with cash in Mobile POS and the settle chit was not properly showing the Change Due.