

Unification - Dining

2016 - Summer Edition

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Overview

The Unified Platform allows Clubs to manage their Dining Reservations seamlessly across the Reservations System into the Office Food and Beverage POS System; ensuring Administration, Members, and the Dining Staff have the tools they need to reserve and manage the Club's Dining experience.

Use Case(s)

A Club may wish to allow their Members to register for Dining Reservations utilizing the on-line Reservations system. Additionally, the Club may also utilize the Clubessential Office Product, with Food and Beverage POS fully implemented in their Dining facilities. In addition to allowing the Members to make reservations online, the Club is interested in assisting Members who call-in or walk-up with making a Dining Reservation. Daily, the Club would also like the Food and Beverage areas of their Club to have integrated visibility and editing capabilities to the Dining Reservations, be able to easily convert the reservations into POS dining tickets; assign tables and servers to the Reservations, add items to the Tickets, and ultimately charge their Members. The Unified Suite provides the Club with the ability to meet their goals.

Reservations/Dining

Make a Reservation (as a Member)

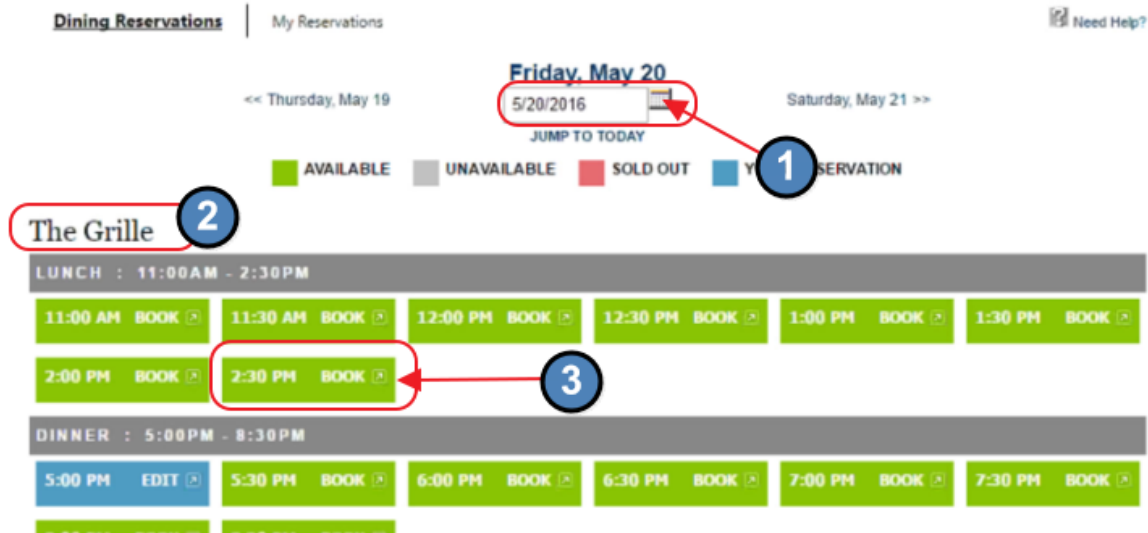
Once a Member makes a Reservation on-line using the Clubessential Dining Reservations product, the Reservations fully integrate into the Food and Beverage POS application. For example a member could make a reservation on the website as follows:

Navigate to Book a Table



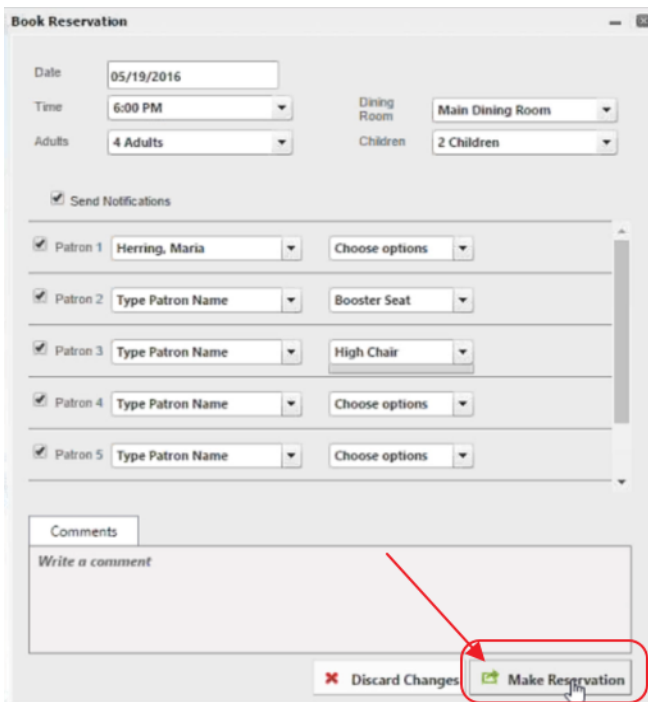
Select Reservation Date/Dining Room/Time

Select the Date, scroll to the desired Dining Room (if more than one exist), and select specific time slot by clicking on the Booking block.



Complete Registration Booking Form

Once a time is selected, the Reservation form will appear. Complete the form, and click "Make Reservation."

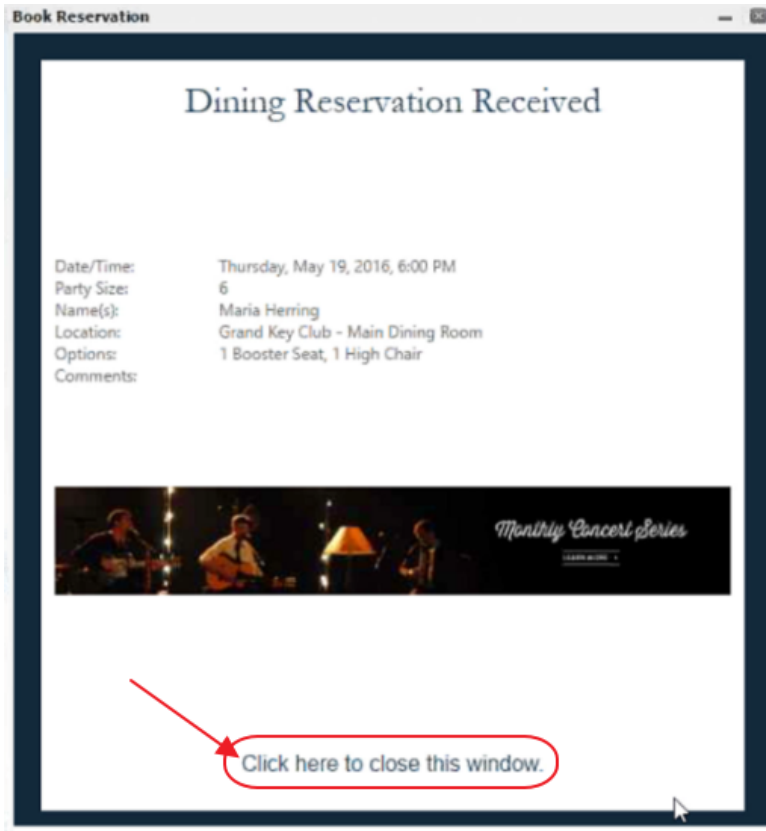


The 'Book Reservation' form is displayed. It includes the following fields and options:

- Date: 05/19/2016
- Time: 6:00 PM
- Dining Room: Main Dining Room
- Adults: 4 Adults
- Children: 2 Children
- Send Notifications
- Patron 1: Herring, Maria (Choose options)
- Patron 2: Type Patron Name (Booster Seat)
- Patron 3: Type Patron Name (High Chair)
- Patron 4: Type Patron Name (Choose options)
- Patron 5: Type Patron Name (Choose options)
- Comments: Write a comment
- Buttons: Discard Changes, Make Reservation

A red arrow points to the 'Make Reservation' button, which is highlighted with a red box.

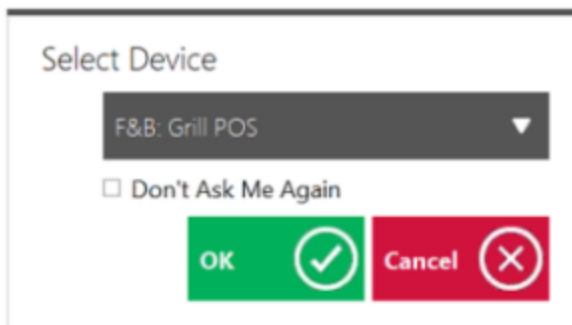
Confirmation screen of reservation being received will appear.



Once a Member makes a Reservation online using the Clubessential Dining Reservations product, the Reservation fully integrates into the Food and Beverage POS application.

Point of Sale (POS)

To view the existing Dining Reservations, log in to the Food and Beverage POS Terminal associated with the Dining area.



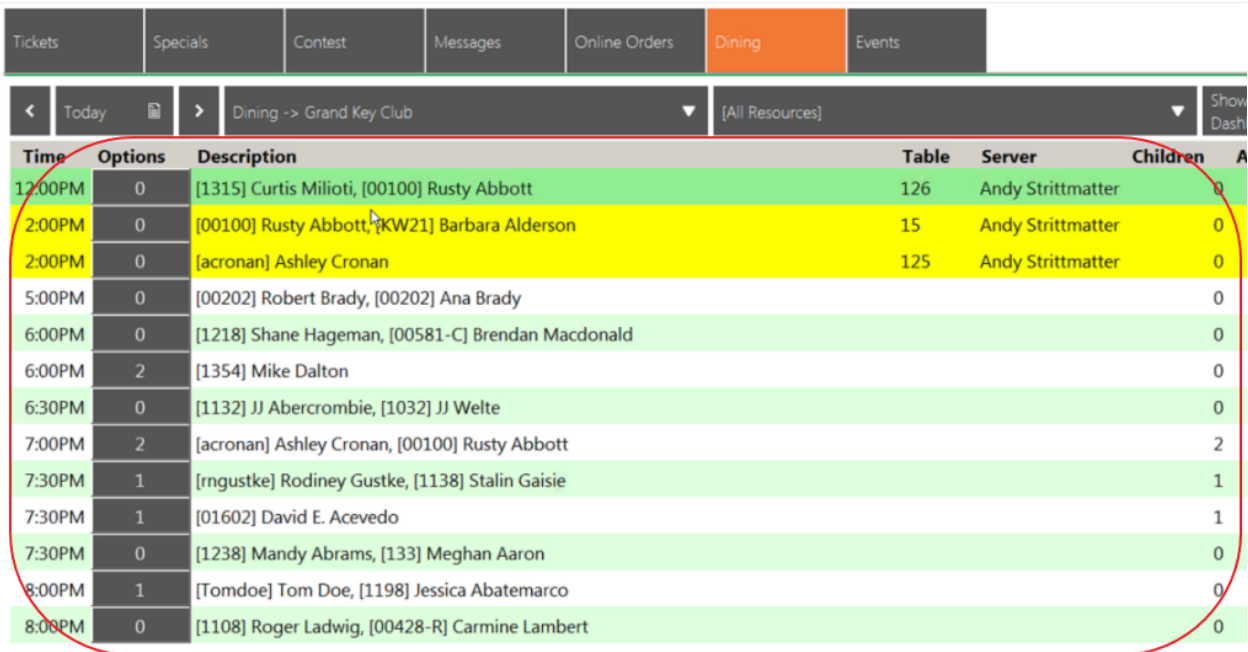
Dining Tab (as a Dining Manager)

Once logged in, navigate to the “Dining,” tab.



Main Grid

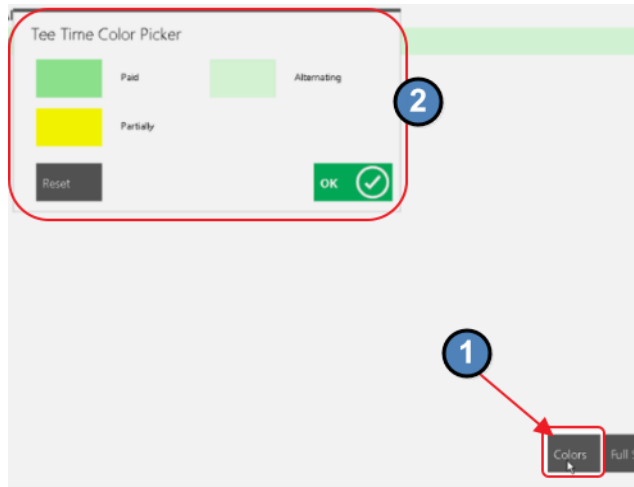
All Dining reservations for Today (default date) will appear on this tab.



Time	Options	Description	Table	Server	Children	A
12:00PM	0	[1315] Curtis Milioti, [00100] Rusty Abbott	126	Andy Strittmatter	0	
2:00PM	0	[00100] Rusty Abbott, [KW21] Barbara Alderson	15	Andy Strittmatter	0	
2:00PM	0	[acronan] Ashley Cronan	125	Andy Strittmatter	0	
5:00PM	0	[00202] Robert Brady, [00202] Ana Brady			0	
6:00PM	0	[1218] Shane Hageman, [00581-C] Brendan Macdonald			0	
6:00PM	2	[1354] Mike Dalton			0	
6:30PM	0	[1132] JJ Abercrombie, [1032] JJ Welte			0	
7:00PM	2	[acronan] Ashley Cronan, [00100] Rusty Abbott			2	
7:30PM	1	[rngustke] Rodiney Gustke, [1138] Stalin Gaisie			1	
7:30PM	1	[01602] David E. Acevedo			1	
7:30PM	0	[1238] Mandy Abrams, [133] Meghan Aaron			0	
8:00PM	1	[Tomdoe] Tom Doe, [1198] Jessica Abatemarco			0	
8:00PM	0	[1108] Roger Ladwig, [00428-R] Carmine Lambert			0	

Colors Displaying on Main Grid

To learn more about the Color meanings on the grid, click on the “Colors” button in the bottom right hand side of the screen. A Color Picker window will launch.



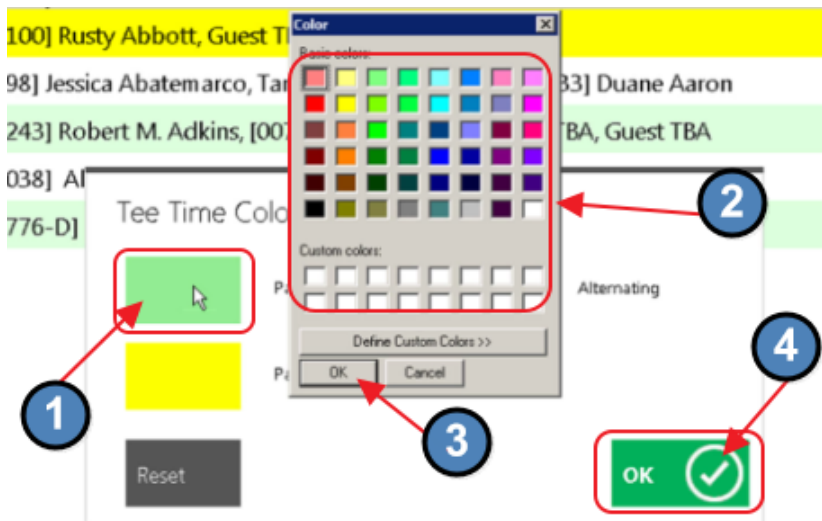
Default colors are as follows:

Dark Green: Paid/Closed Reservations

Yellow: Partially/Open Tickets(Converted from Reservations)

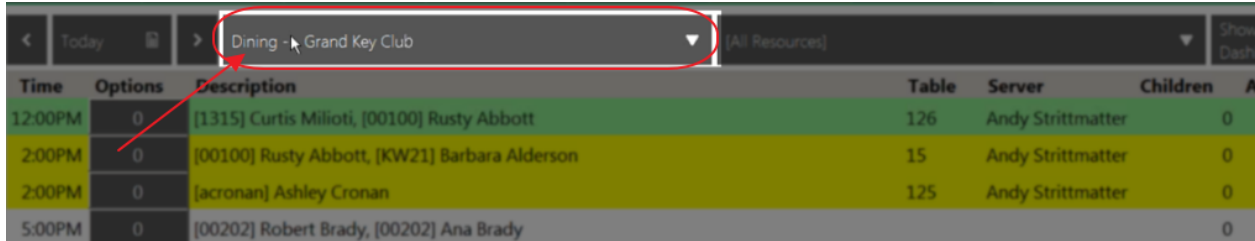
Light Green: Alternating (Used in every other row of the grid for tickets with no status to make grid display easier to read.)

Colors may be changed by clicking on the color, selecting a new color, and clicking, "OK."



Club Display

This filter contains the Club(s) available in the POS. In the event more than one Club exists in the system, selection of a particular Club will be available here.

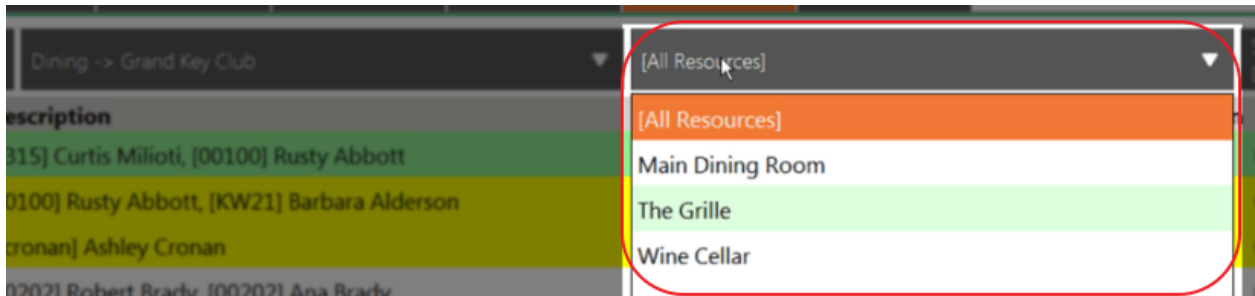


A screenshot of a POS interface showing a table of reservations. At the top, there is a filter dropdown menu set to "Dining -> Grand Key Club". The table has columns for Time, Options, Description, Table, Server, and Children. The data rows are as follows:

Time	Options	Description	Table	Server	Children
12:00PM	0	[1315] Curtis Milioti, [00100] Rusty Abbott	126	Andy Strittmatter	0
2:00PM	0	[00100] Rusty Abbott, [KW21] Barbara Alderson	15	Andy Strittmatter	0
2:00PM	0	[acronan] Ashley Cronan	125	Andy Strittmatter	0
5:00PM	0	[00202] Robert Brady, [00202] Ana Brady			0

Dining Rooms Display

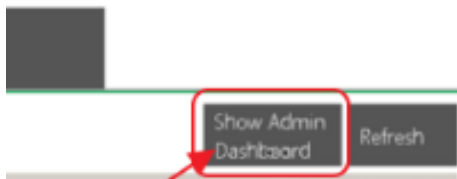
The filter (below) contains the Dining Rooms. Most Clubs have more than one Dining Room, and as a Dining Room Manager, it is common to utilize the "All Resources" option within the drop-down to display all dinings reservations in the Club.



A screenshot of the POS interface showing a dropdown menu for Dining Rooms. The dropdown is open, showing the following options: "[All Resources]", "Main Dining Room", "The Grille", and "Wine Cellar". The "[All Resources]" option is highlighted in orange. The background shows the same reservation table as in the previous screenshot.

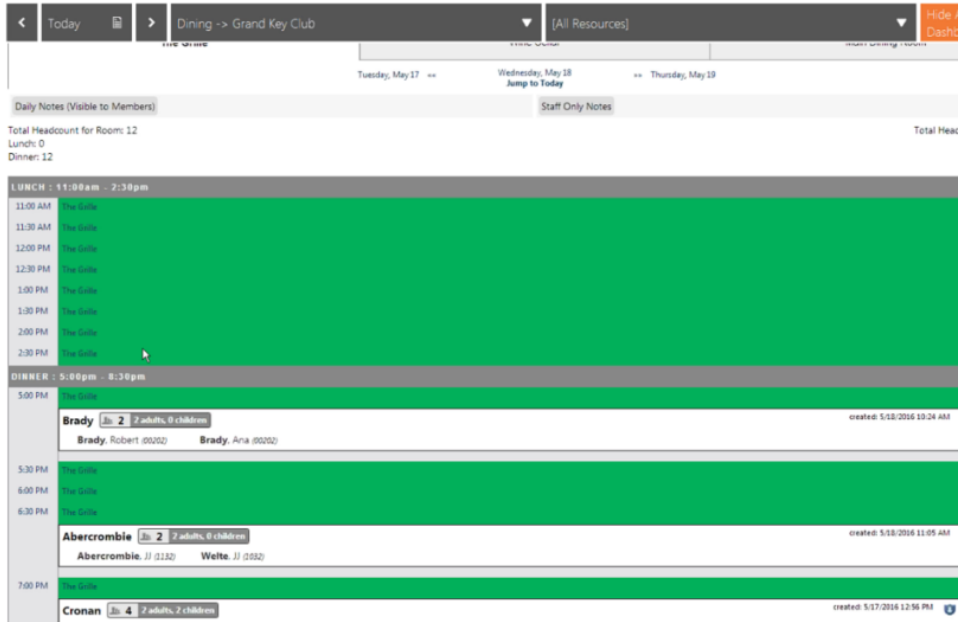
Show Admin Dashboard

Click on the "Show Admin Dashboard" button in the upper right-hand corner of the screen to make/edit reservations directly from the POS.

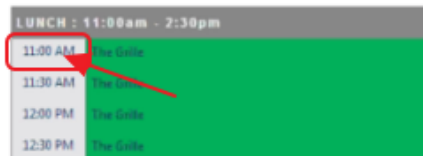


Once clicked, the Admin Webview functionality launches.

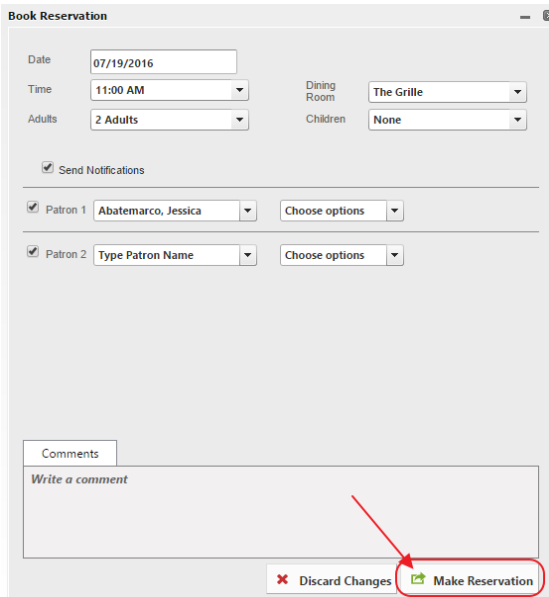
Make/Edit Reservations within POS



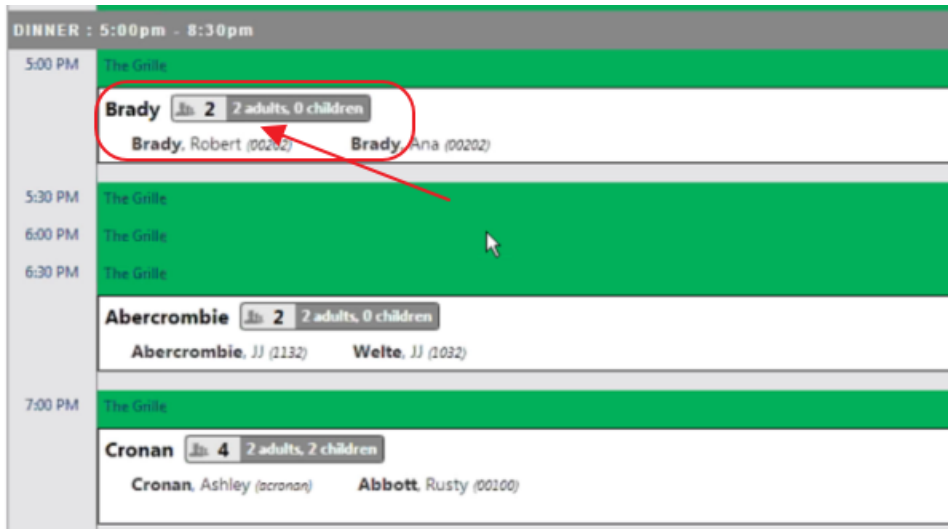
To make a new Reservation, click on the desired time of the reservation to launch the Reservation form..



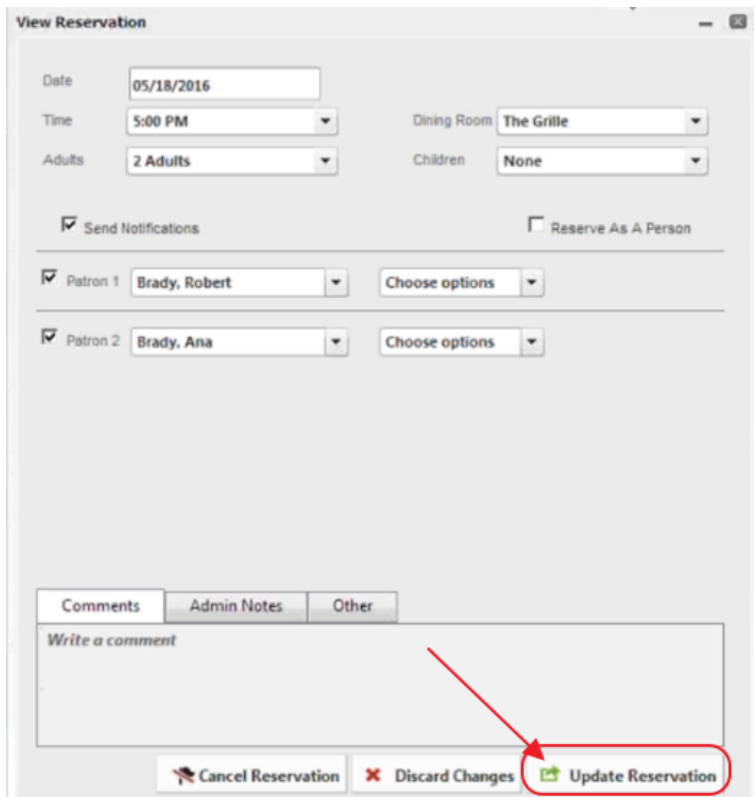
Complete the Reservation form, and click, "Make Reservation."



To edit or cancel a Reservation, click on the Reservation.



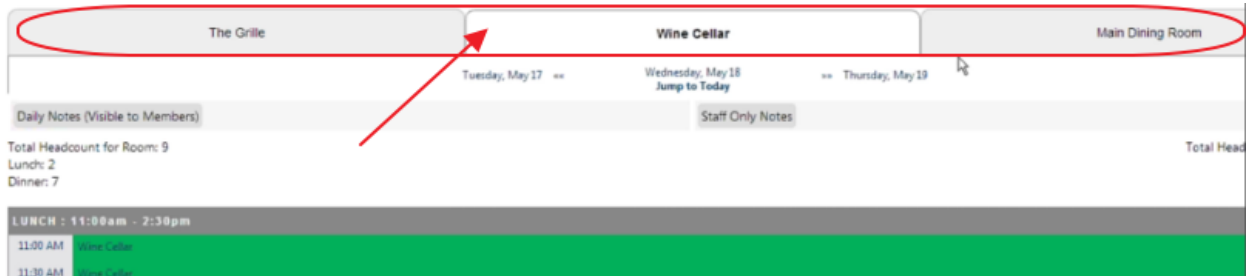
Make changes as necessary to the Reservation Form, and click "Update Reservation."



Click, "Cancel Reservation" to eliminate reservation from the Dining System.

Choose, "Discard Changes," to exit form without making any changes.

To navigate to a different Dining Room within the Admin Dashboard, click on the tab of the Dining Room desired.



Click "Hide Admin Dashboard" to return to main Dining Reservations grid.

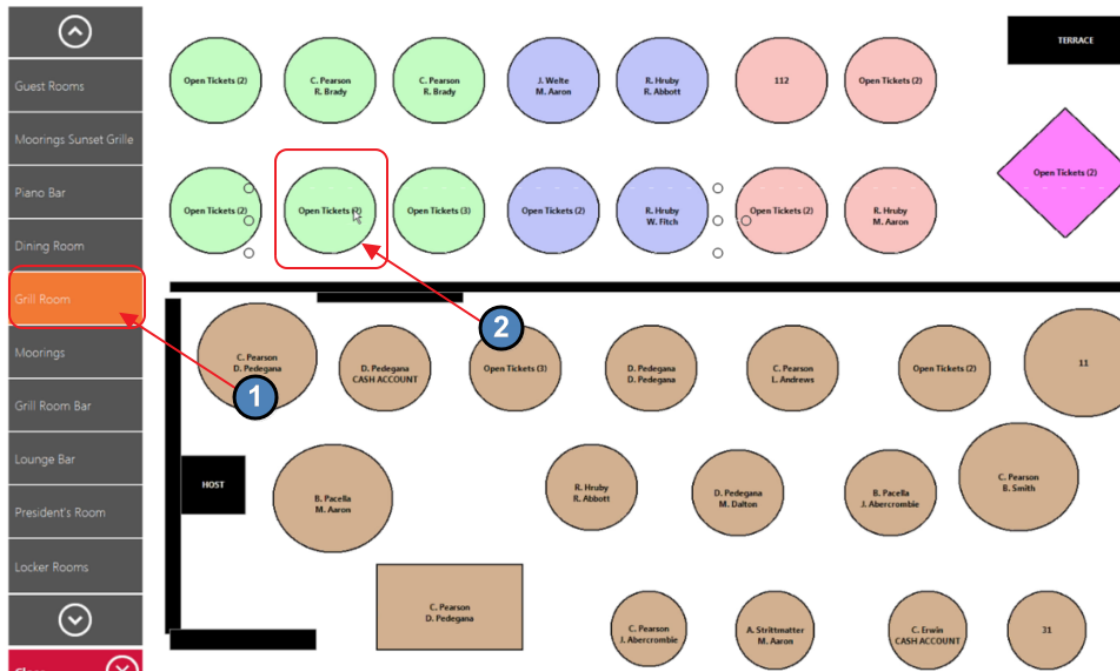


Convert Dining Reservations to Open Tickets

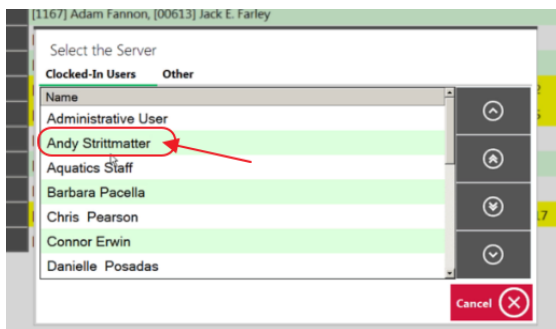
To convert a Dining Reservation into an Open Ticket, click on the desired Dining reservation.

Time	Options	Description	Table	Server	Children	Ad
2:00PM	0	[1167] Adam Fannon, [00613] Jack E. Farley			0	
2:00PM	1	[KW04] Carrie Cole, [KW26] Tracey Harty			0	
5:30PM	1	[KW32] Kate Karnik, [00907] Arthur Erickson			0	
5:30PM	0	[00100] Rusty Abbott	12	Andy Strittmatter	0	
6:00PM	0	[1238] Mandy Abrams	15	Andy Strittmatter	0	
6:00PM	2	[1280] Maria Herring			2	
7:00PM	1	[acronan] Ashley Cronan			1	
7:00PM	0	[RM-1] James Patterson			0	
7:00PM	2	[1163] Mike Haber, [00100-B] Jackson Abbott	117	Andy Strittmatter	0	
8:00PM	0	[04074] Tal Smith, [1168] Ali Tabrizi			0	

Next, ensure the Dining Room is set correctly, and then select a table.



Once a table has been selected, assign a server to the table. Click on Server's name to assign the server to the table.



Note, the ticket is open, the Table and Server have been assigned, and the Reservation moves to Partial/Open status (yellow).

Time	Options	Description	Table	Server	Children	A
2:00PM	0	[1167] Adam Fannon, [00613] Jack E. Farley			0	
2:00PM	1	[KW04] Carrie Cole, [KW26] Tracey Harty			0	
5:30PM	1	[KW32] Kate Karnik, [00907] Arthur Erickson			0	
5:30PM	0	[00100] Rusty Abbott	12	Andy Strittmatter	0	
6:00PM	0	[1238] Mandy Abrams	15	Andy Strittmatter	0	
6:00PM	2	[1280] Maria Herring	125	Andy Strittmatter	2	
7:00PM	1	[acronan] Ashley Cronan			1	
7:00PM	0	[RM-1] James Patterson			0	

Review Dining Room Status

To review the status of the open Dining Room tickets, click on an open (Yellow) ticket to launch the "Ticket Audit Preview," screen. The food ordered can be viewed, and therefore an estimate of when the table may be available could be obtained. In the example below, entree salads were just ordered, so it is likely the table will not be finishing up in the very near future.

Time	Options	Description
12:00PM	0	[1167] Adam Fannon, [00613] Jack E. Farley
12:00PM	1	[KW04] Carrie
12:30PM	1	[KW32] Kate
12:30PM	0	[00100] Rusty
12:00PM	0	[1238] Mandy
12:00PM	2	[1280] Maria
12:00PM	1	[acronan] Ashley
12:00PM	0	[Tom-1] James
12:00PM	2	[1163] Mike
12:00PM	0	[04074] Tal

Ticket Audit Preview

```

Area: Grill Room
Ticket#: 241461
Member: Abrams, Mandy (1238)
-----
05/18 User, Administrative
-----
12:53 Create ticket
-----
05/18 Strittmatter, Andy
12:54 Add Caesar With Salmon
12:54 Add Bay Shrimp Louie Salad
            
```

OK

Dining Tab (As a Server)

The Dining tab and associated reservations are also viewable to the Servers.

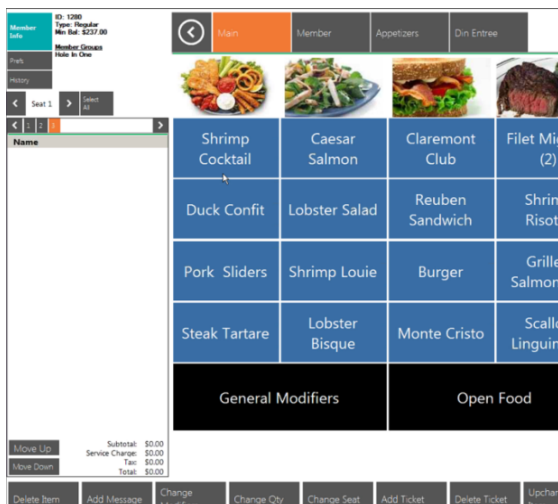
Time	Options	Description	Table	Server	Children
12:00PM	0	[1315] Curtis Milioti, [00100] Rusty Abbott	126	Andy Strittmatter	0
2:00PM	0	[00100] Rusty Abbott, [KW21] Barbara Alderson	15	Andy Strittmatter	0
2:00PM	0	[acronan] Ashley Cronan	125	Andy Strittmatter	0
5:00PM	0	[00202] Robert Brady, [00202] Ana Brady			0
6:00PM	0	[1218] Shane Hageman, [00581-C] Brendan Macdonald			0
6:00PM	2	[1354] Mike Dalton			0
6:30PM	0	[1132] JJ Abercrombie, [1032] JJ Welte			0
7:00PM	2	[acronan] Ashley Cronan, [00100] Rusty Abbott			2
7:30PM	1	[rngustke] Rodney Gustke, [1138] Stalin Gaisie			1
7:30PM	1	[01602] David E. Acevedo			1
7:30PM	0	[1238] Mandy Abrams, [133] Meghan Aaron			0
8:00PM	1	[Tomdoe] Tom Doe, [1198] Jessica Abatemarco			0
8:00PM	0	[1108] Roger Ladwig, [00428-R] Carmine Lambert			0

Convert Open Ticket to Member Charge

Once ticket has been assigned to a Server, the Server can access the Ticket on the Tickets tab. Server will click ticket to open.

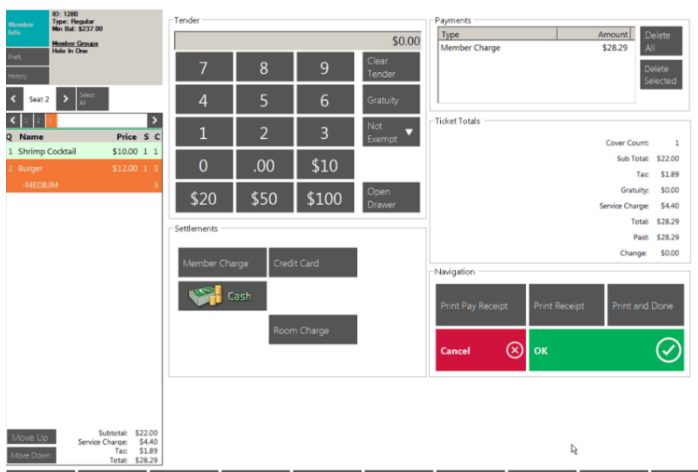
ID	Full Name	Area	Table	Ticket #	Server Name
133	Aaron, Ms. Meghan	Grill Room	33 - 1	241264	Andy Strittmatter
00100	Abbott, Mr. Rusty	Grill Room	12 - 1, 2, 3	241453	Andy Strittmatter
1238	Abrams, Mandy	Grill Room	15 - 1	241461	Andy Strittmatter
1163	Haber, Mike	Grill Room	117	241462	Andy Strittmatter
00100	Abbott, Mr. Rusty	Grill Room	15	241466	Andy Strittmatter
09999	CASH ACCOUNT	Grill Room	125	241467	Andy Strittmatter
1280	Herring, Maria	Grill Room	125	241469	Andy Strittmatter

Once open, items can be added utilizing normal POS functionality.



The screenshot shows a POS menu interface with a top navigation bar containing 'Main', 'Member', 'Appetizers', and 'Din Entree'. Below the navigation bar are several food items displayed in a grid format, including Shrimp Cocktail, Caesar Salmon, Claremont Club, Filet Mignon (2), Duck Confit, Lobster Salad, Reuben Sandwich, Shrimp Risotto, Pork Sliders, Shrimp Louie, Burger, Grilled Salmon, Steak Tartare, Lobster Bisque, Monte Cristo, and Scallops Linguine. At the bottom, there are buttons for 'General Modifiers' and 'Open Food'. A summary box at the bottom left shows a subtotal of \$0.00, service charge of \$0.00, tax of \$0.00, and a total of \$0.00.

When complete, ticket can be closed based on Member/Guest payment preference.



The screenshot shows the POS payment screen. It features a numeric keypad for entering the amount, with buttons for 'Clear', 'Tender', 'Gratuity', 'Not Exempt', and 'Open Drawer'. Below the keypad are payment options: 'Member Charge', 'Credit Card', 'Cash', and 'Room Charge'. A 'Payments' section shows a 'Member Charge' for \$28.29. A 'Ticket Totals' section displays: Cover Count: 1, Sub Total: \$22.00, Tax: \$1.89, Gratuity: \$0.00, Service Charge: \$4.40, Total: \$28.29, Paid: \$28.29, Change: \$0.00. At the bottom, there are buttons for 'Print Pay Receipt', 'Print Receipt', 'Print and Done', 'Cancel', and 'OK'.