

10.17.16 Releases

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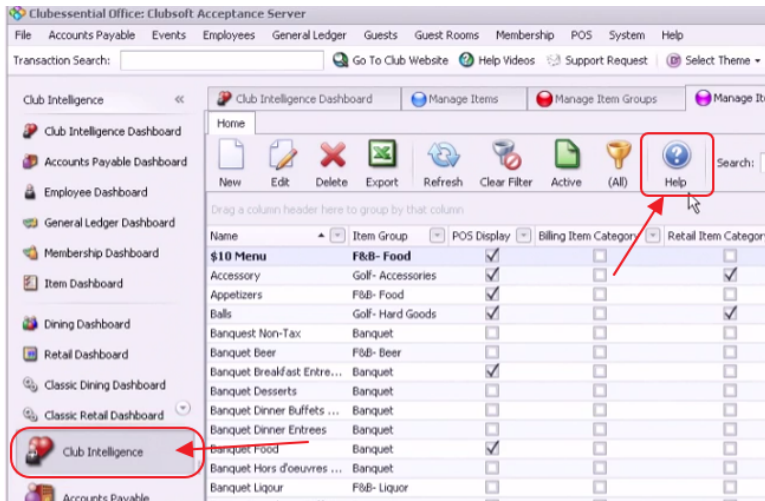
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Enhancements

General - Help/Club Intelligence

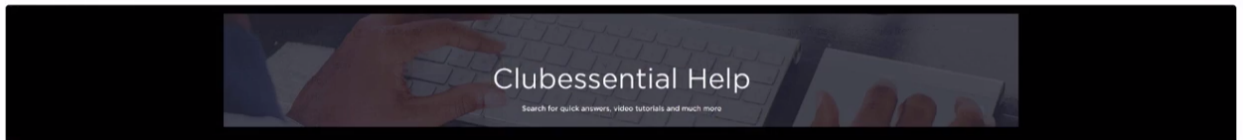
- Updated Help Icon and Club Intelligence to point to new Clubessential Resource Center.

Use Case: Access educational resources at your fingertips in this newly redesigned knowledge base. Review Modules/Topics, Release Notes, past and upcoming Webinars, and more. Main landing page can also be found at Kb.clubessential.com.



CE - Client Education Resource Center / Clubessential Resource Center
Office Help Home
Created by Stacy Zak, last modified on Oct 12, 2016

Clubessential Help Home



4th Qtr - Office Educational Webinars

T'is the (Season) Series -	
10/26/2016	"Extra Dough for the Holidays" <small>New Payment Options</small>

Office - Release Notes

- Office - Version 5.9
yesterday at 12:06 PM • updated by Stacy Zak • view change
- Office - 09.12.16 - Releases
yesterday at 12:05 PM • updated by Stacy Zak • view change
- Office - 09.26.16 - Releases

Recently updated articles

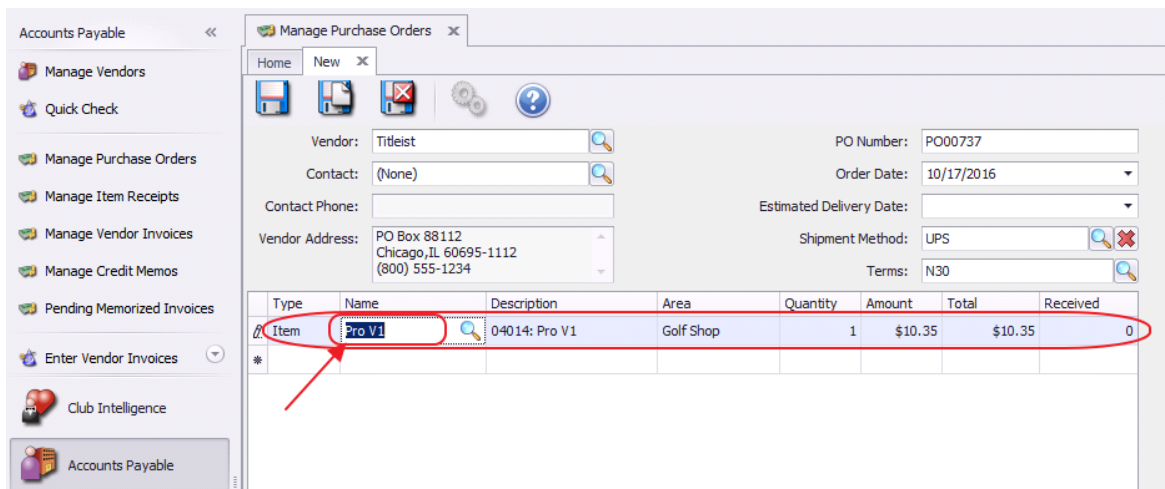
- Office - Wait Staff Training Videos
yesterday at 5:52 PM • updated by Stacy Zak • view change
- Office - Retail Point of Sale Videos
yesterday at 5:50 PM • updated by Stacy Zak • view change
- Office - Point of Sale Setup Videos

Accounts Payable

Manage Purchase Orders - Entry Form

- Updated the purchase order form to select all the text in a cell when tabbing through the grid.

Use Case: When tabbing through the Grid, users will have an improved user experience when viewing/editing data, as all data is now selected, and therefore highly visible.



Type	Name	Description	Area	Quantity	Amount	Total	Received
Item	Pro V1	04014: Pro V1	Golf Shop	1	\$10.35	\$10.35	0

Manage Item Receipts - Entry Form

- Same enhancement noted above.

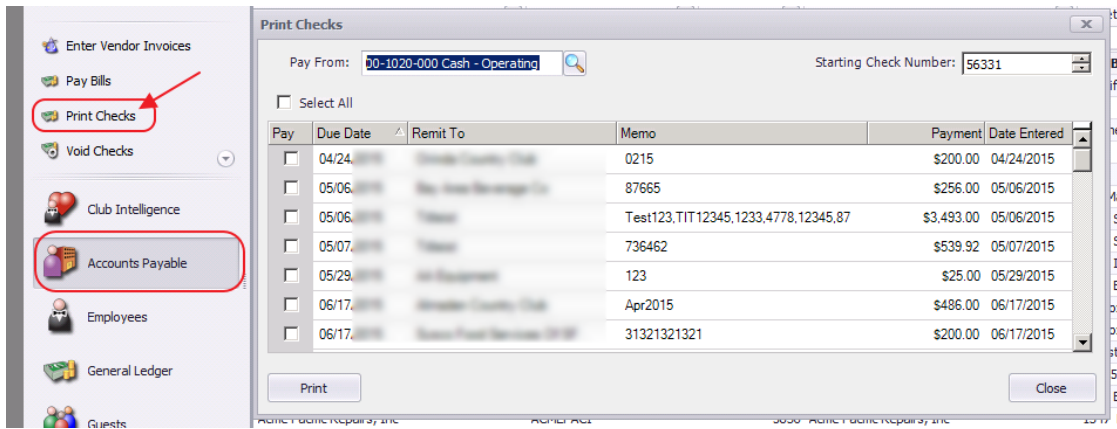
Manage Vendor Invoices - Entry Form

- Same enhancement noted above.

Print Checks

- Updated the AP check printing process to print two copies of the check overflow report in order to have a copy for both the club and the vendor.

Use Case: When printing checks with remittances that span more than one page, save having to make a copy of the second page because this page will also print two copies now.

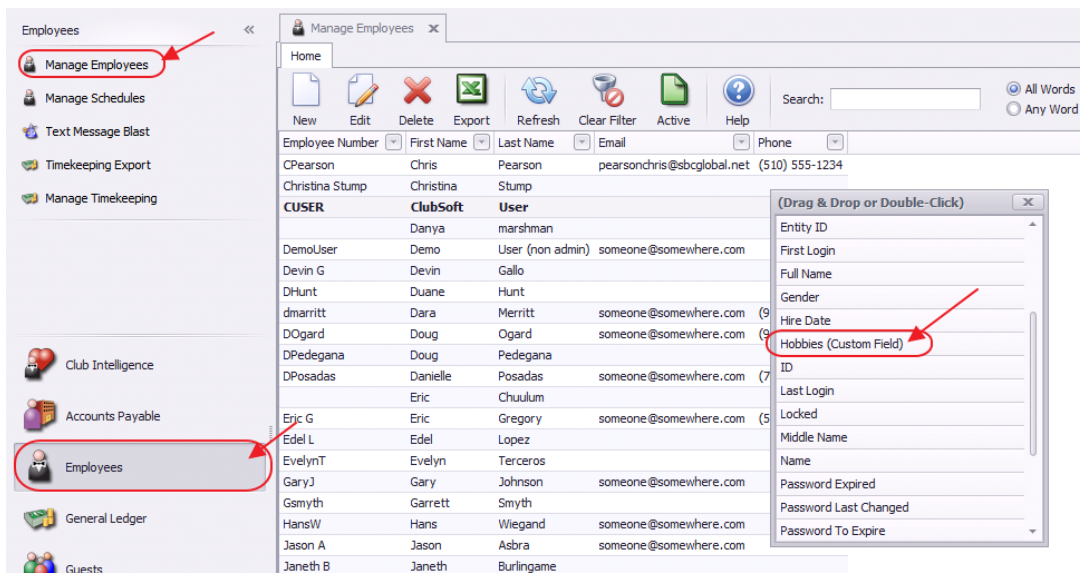
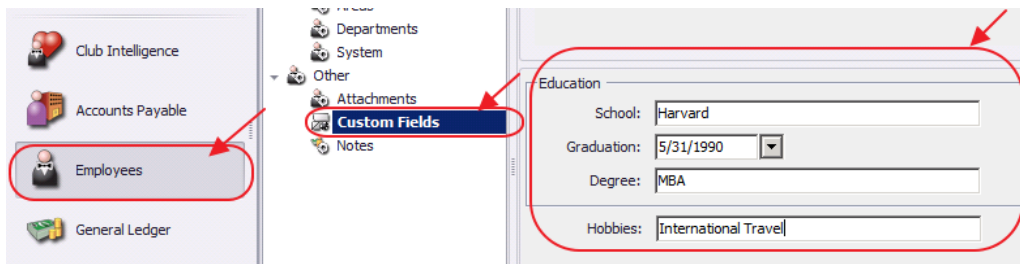


Employees

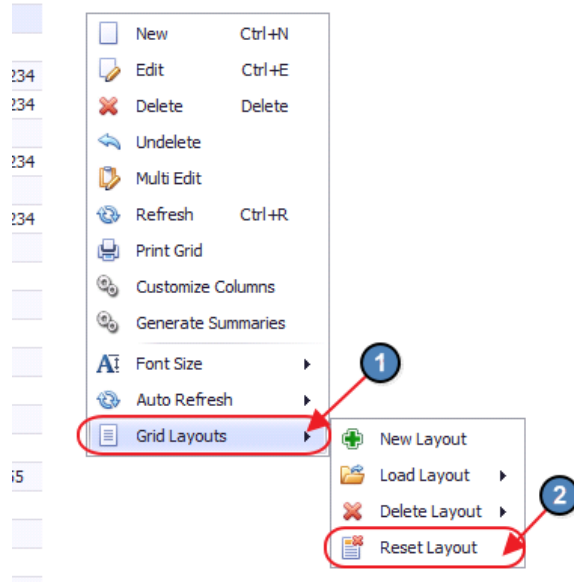
Manage Employees - Grid

- Updated the Manage Employees grid to show any custom fields defined for employees.

Use Case: Previously unavailable, custom employee fields may now be added to the grid for viewing.



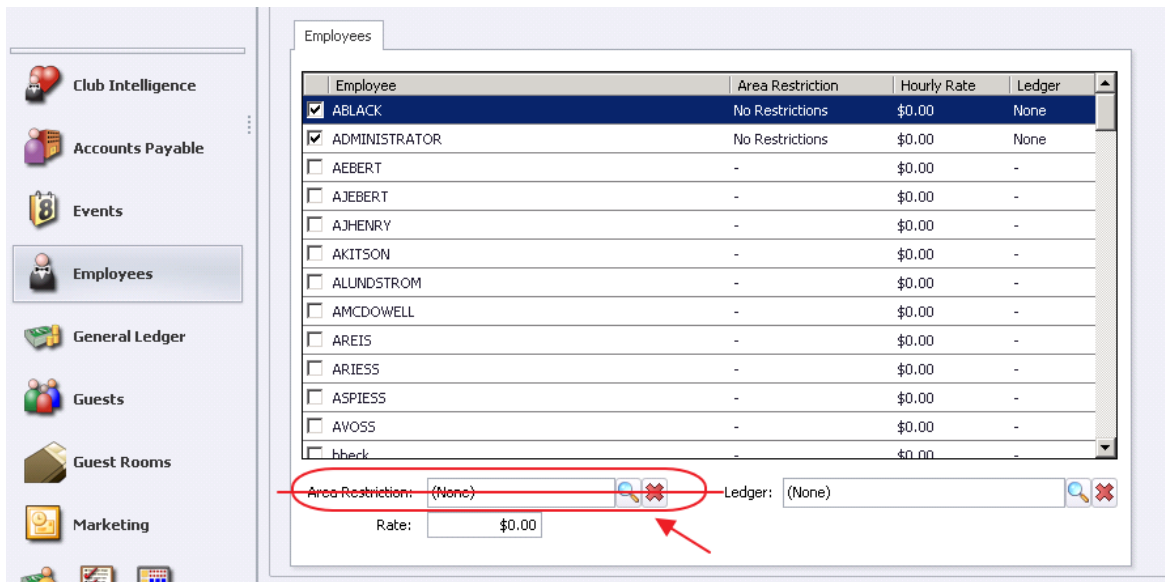
If fields are not visible, right-click on grid, select **Grid Layouts**, and select **Reset Layout**.



Job Codes

- Removed the "Area Restriction" field from the from Job Code editor since it was not used for any function.

Use Case: Eliminate non-functioning options to eliminate confusion.



Membership

Manage Members - Grid

- Updated the Manage Members grid to add Last (Member Status, Member Type, Player Type) ChangeDate columns.

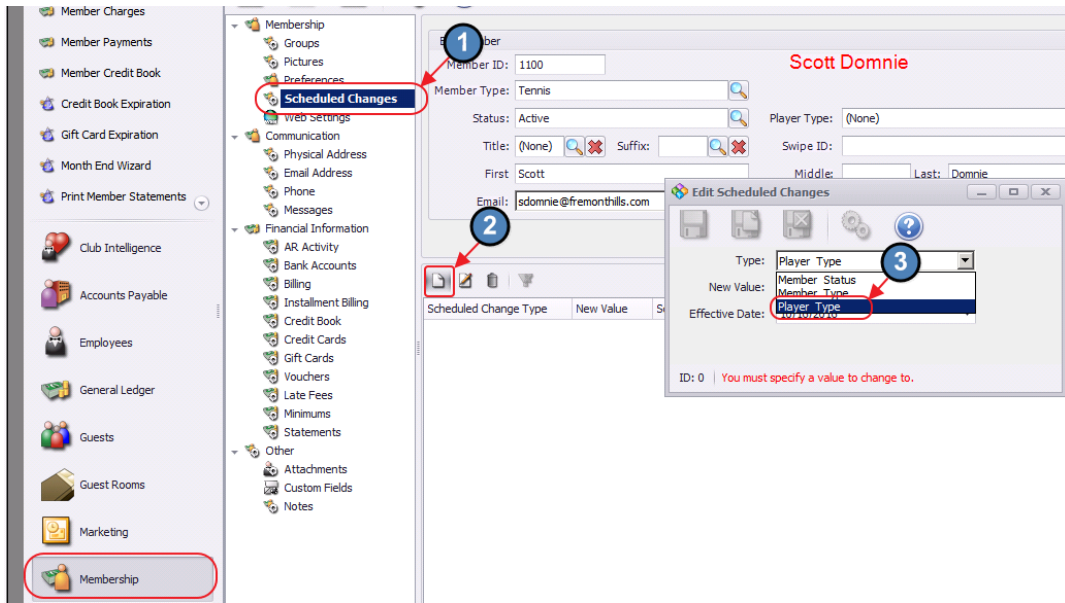
Use Case: Previously not available for viewing on the grid, these fields will now bring visibility to last change dates. With these features now available for scheduling, this simplifies the process of reviewing changes that have occurred.

Member Number	Last Name	First Name	Join Date	Phone	Email	Last Payment Date
00101	Hutchinson	John Allen	10/25/19...	(510) 555-1...	hutchinson@nvaxiantgroup...	06/15/
00102	Hickman	Clifford S.	01/29/2002	(925) 555-1234	hickman@nvcliffa.com	06/15
00103	Mcdowell	Joseph E.	10/24/1996	(510) 555-1234	mcdowell@nvaddiego.com	06/15
00104	English	Stephen	03/23/2011	(510) 555-1234	english@nvdfunding.com	06/15
00105	Moore	Sally	05/12/1971	(925) 555-1234	moore@nv@gmail.com	06/15
00106	Boyer	Joseph E.	03/18/1982			06/15
00107	Wolf	Charles B.	07/27/2011			06/15
00108	Johns	Eden	08/27/2008			06/15
00109	Durham	Pete	06/25/1999			06/15
00110	Myers	Robert J.	10/01/1969			06/15
00111	Larson	James S.	05/02/2001			06/15
00112	Garcia	Michael	04/16/2008			06/15
00113	Patterson	Rick	09/27/2006			06/15
00114	Cross	Alison M.	05/26/2005			06/15
00115	Willis	Jean	12/23/1994			06/15
00116	Holman	Kevin	08/24/2011			06/15
00117	Huff	Mark S.	10/01/1998			06/15
00119	Barr	R. Hewitt	08/24/2011			06/15
00120	Williams	Steven R.	12/01/1974			06/15
00121	Rivera	Keith	06/18/1998			06/15
00122	Mullins	Dick	12/19/1996			06/15
00123	Maynard	George T.	04/19/1990			06/15
00124	Rodgers	J. Richard	10/19/1989	(510) 555-1234	rodgers@nv@gmail.com	06/15
00125	Galloway	William B.	09/22/1983	(510) 555-1234	galloway@nvscglobal.net	06/15
00126	Bates	Allison	03/28/2012	(415) 555-1234	bates@nv@gmail.com	06/15
00127	Rivera	Richard T.	03/30/2005	(925) 555-1234	rivera@nvcomcast.net	06/15
133	Aaron	Duane	03/30/2005	(415) 555-1234	dhunt@clubessential.com	09/08
00134	Roy	Nicholas	04/26/2011	(510) 555-1234	roy@nvbatravision.com	06/15
00135	Harvey	Debbi	06/23/2004	(510) 555-1234	harvey@nvdebbidimaggio.com	06/15

Member Profile - Scheduled Changes

- Updated the system to allow a user to schedule a Player Type change in addition to the existing Member Status and Member Type change.

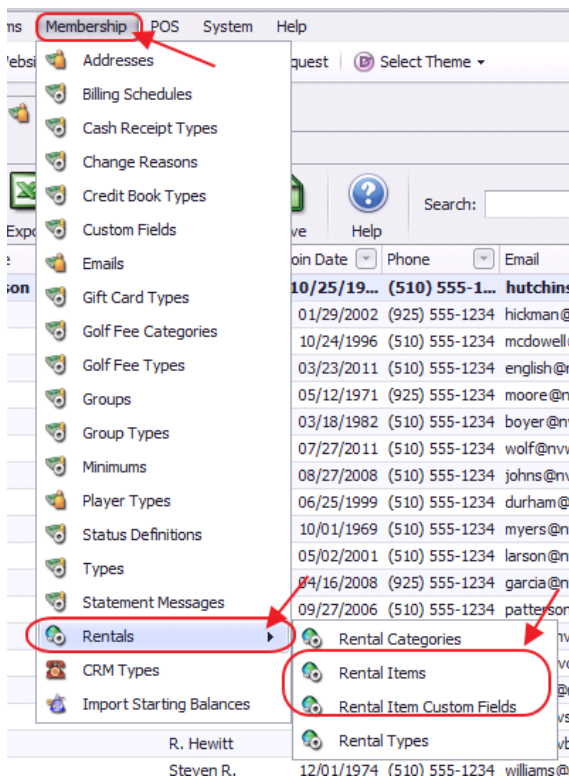
Use Case: Now, use the Scheduled Changes tab within the Member Profile, to add a Scheduled Change of **Member Type**, **Member Status**, or **Player Type** when the date is known and in the future to ensure fees are appropriate charged to members with changing statuses.



Membership - Rentals - Rental Item Grid

- Updated the Manage Rental Items grid to show any custom fields defined for Rental Items.

Use Case: Previously unavailable, custom fields defined for Rental Items (such as boat slip #) may now be added to the grid for viewing.



Point of Sale (POS): Tee Sheet/Admin View

- Updated the POS Admin Tee sheet view to scroll to the last tee time if all tee times occurred in the past.

Use Case: If it is 5pm, and last tee time took place at 2:30pm, system will auto-scroll to last tee time of the day.

The screenshot shows the POS Admin Tee Sheet interface. At the top, there is a navigation bar with tabs for Tickets, Labor, Specials, Contest, Messages, Activities, Tee Times (selected), and Events. Below this is a control bar with navigation arrows, 'Today', a calendar icon, 'South', a dropdown arrow, 'No Filter', another dropdown arrow, 'Multi-Select Off', and buttons for 'Show Admin Dashboard' (highlighted with a red box and arrow) and 'Refresh'. Below the control bar is a table header with columns: Course, Time, Description, Paid, and Golfers. The table content shows a list of tee times from 3:50 PM to 5:50 PM. The 2:30 PM slot is highlighted with a red oval, showing a reservation for Duane Aaron and Jessica Abatemarco, both riding. The reservation is noted as 'Reserved by: Duane Aaron'. At the bottom right of the control bar, there are buttons for 'Hide Admin Dashboard' and 'Refresh'.

System - System Settings

- Updated POS and Axis Tee Time integration to support processing payments with Open Edge enrolled credit cards from the public booking website.

Use Case: When Guests book Tee Times using the public side of the website, and reserve their tee time with a credit card, this feature allows the club to process the transaction using the same credit card information provided in the original booking (useful for charging no-shows, etc). This behind the scenes functionality requires no change on the User side.



Bug Fixes

- Fixed an issue with NACHA auto payment batches not automatically pulling default bank accounts for a member.
- Fixed an issue where spouse edits to a shared address were not saving when pulling from the website.
- Fixed an issue with the Cash Receipt Wizard taking several minutes to delete rows in a very large batch.
- Fixed an issue where an error message would display when saving a member after clearing out a choice custom field.
- Fixed an issue with the Text Message Blast wizard where an invalid email address could be set as the sender and the wizard would appear to create the messages properly but not deliver any texts.
- Fixed an issue with the Text Message Blast wizard where the employee's phone number wasn't getting added to the recipient address list.
- Fixed an issue with Employee SMS Messages getting delayed by the time zone offset between the local system and the hosted server.
- Fixed an issue with the GL account name displaying as N/A on the Check Reconciliation Report after you successfully print checks in the Print Checks wizard.
- Fixed an issue where the area column in the Item Receipt editor may not display when Enable Multi-Location Inventory is checked in System Settings.
- Fixed an issue with the Edit Vendor Invoice form not displaying member numbers for member line items.
- Fixed an issue when deleting and undeleting item receipts that would not update linked purchase order properly.
- Fixed an issue when using the multi-edit function to bulk change Vendor Terms.
- Fixed an issue when saving a Quick Check with linked item receipts.
- Fixed an issue with the Item Receipt form asking multiple times if the user wants to mark an item active.
- Fixed an issue when changing the sponsoring member on a guest room, reservation was not updating the guest room reservation properly, causing tax and service charge to calculate with the previous sponsoring member.

- Fixed an issue with rates not calculating after splitting a guest room reservation and then moving part of the reservation to a new room.
- Fixed an issue with how guest rooms calculate tax and service charge in all areas.
- Fixed an issue that would allow a Guest Room sponsoring member to change on reservations after they have been checked in.
- Fixed an issue with tab orders on Guest Room guest editor.