



Retail Areas

2016 - Fall Edition

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Overview

An Area is used to define settings pertaining to a designated location of the Club where transactions will occur. Although Areas are set up during Implementation, occasionally, an area will need to be modified to coincide with operational changes. In this document, we will discuss the various settings to be maintained in a Retail Area.

Important: It is **NOT** recommended to create a new Area without first contacting Clubessential Support.

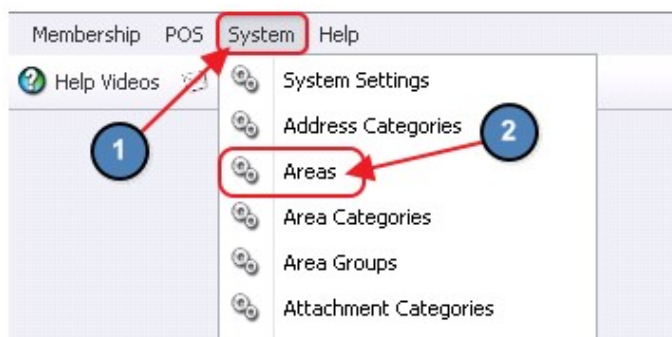
Use Case(s)

The Golf Shop at a Club has expanded, and has a new Manager with an increased focus on Customer Service and operational efficiencies. As such, changes to the original configuration of the Golf Shop area will need to be made. For example, the Draw Member Favorites button will now be enabled so that Staff can view and inquire about Member satisfaction regarding the latest 10 items purchased by the Member. Additionally, the Require Comp Selection option will be enabled to ensure visibility is gained as to why staff is providing complimentary items by requiring them to enter a reason code.

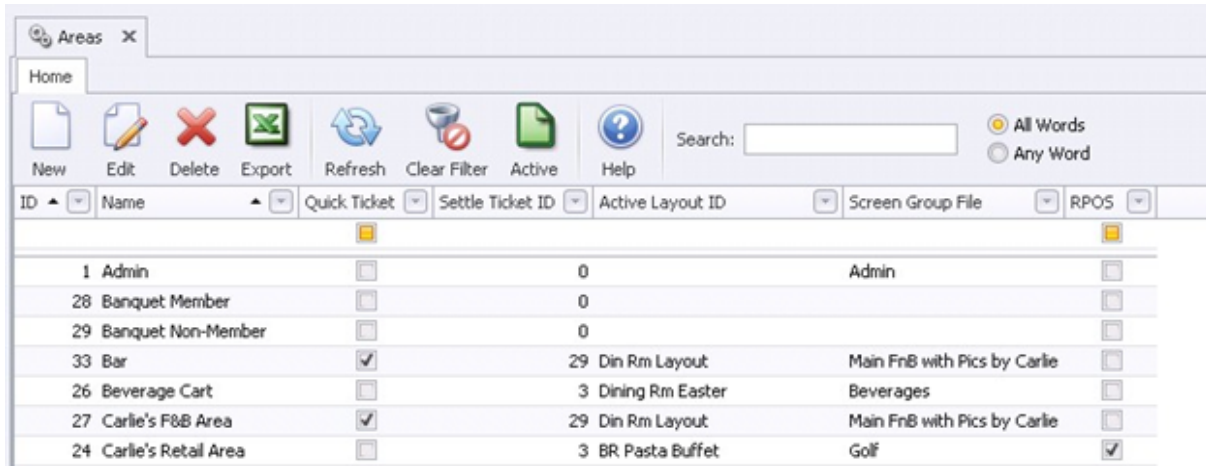
Accessing the Tool

To access Areas,

- 1) Navigate to **System** across the top toolbar and select **Areas**.

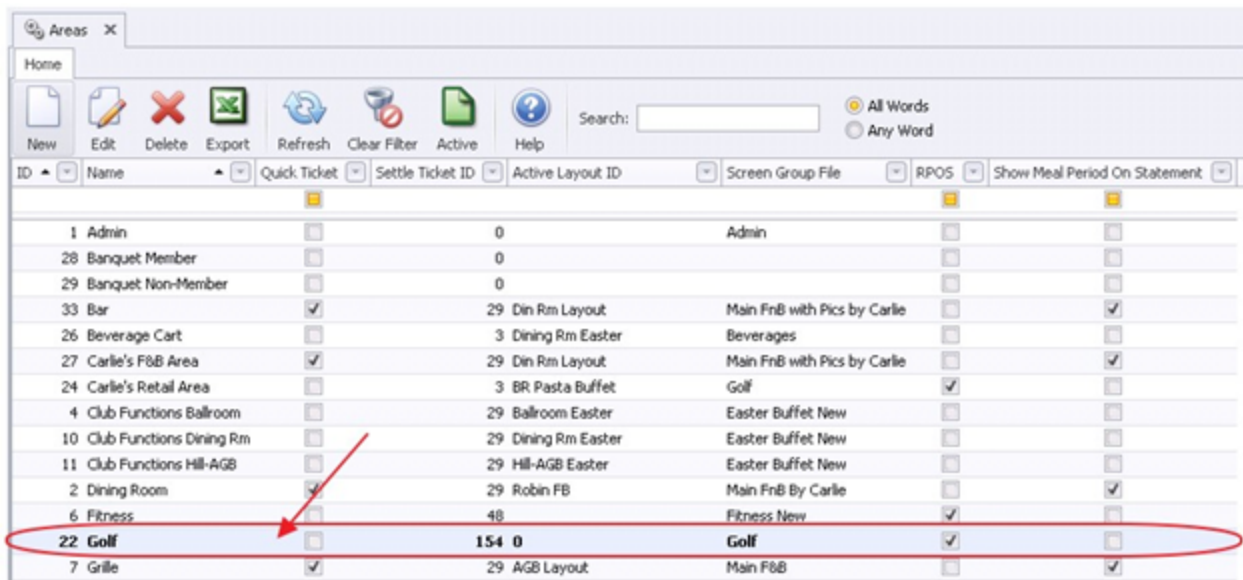


- 2) The **Areas Grid** will launch.



ID	Name	Quick Ticket	Settle Ticket ID	Active Layout ID	Screen Group File	RPOS
1	Admin	<input type="checkbox"/>	0		Admin	<input type="checkbox"/>
28	Banquet Member	<input type="checkbox"/>	0			<input type="checkbox"/>
29	Banquet Non-Member	<input type="checkbox"/>	0			<input type="checkbox"/>
33	Bar	<input checked="" type="checkbox"/>		29 Din Rm Layout	Main FnB with Pics by Carlie	<input type="checkbox"/>
26	Beverage Cart	<input type="checkbox"/>		3 Dining Rm Easter	Beverages	<input type="checkbox"/>
27	Carlie's F&B Area	<input checked="" type="checkbox"/>		29 Din Rm Layout	Main FnB with Pics by Carlie	<input type="checkbox"/>
24	Carlie's Retail Area	<input type="checkbox"/>		3 BR Pasta Buffet	Golf	<input checked="" type="checkbox"/>

3) The primary functions associated with managing Areas are embedded in the Area setup screen, which can be accessed by double-clicking on an existing Area.

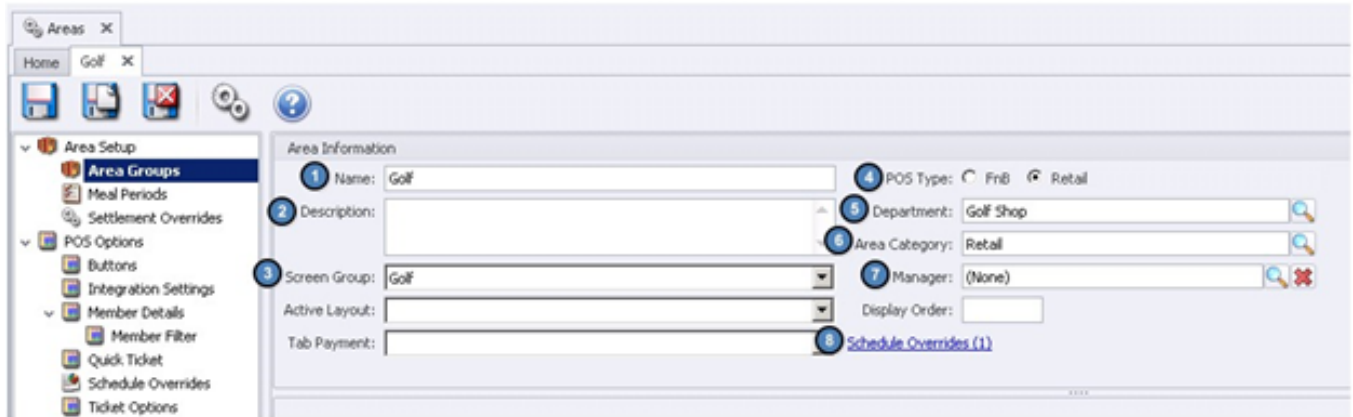


ID	Name	Quick Ticket	Settle Ticket ID	Active Layout ID	Screen Group File	RPOS	Show Meal Period On Statement
1	Admin	<input type="checkbox"/>	0		Admin	<input type="checkbox"/>	<input type="checkbox"/>
28	Banquet Member	<input type="checkbox"/>	0			<input type="checkbox"/>	<input type="checkbox"/>
29	Banquet Non-Member	<input type="checkbox"/>	0			<input type="checkbox"/>	<input type="checkbox"/>
33	Bar	<input checked="" type="checkbox"/>		29 Din Rm Layout	Main FnB with Pics by Carlie	<input type="checkbox"/>	<input checked="" type="checkbox"/>
26	Beverage Cart	<input type="checkbox"/>		3 Dining Rm Easter	Beverages	<input type="checkbox"/>	<input type="checkbox"/>
27	Carlie's F&B Area	<input checked="" type="checkbox"/>		29 Din Rm Layout	Main FnB with Pics by Carlie	<input type="checkbox"/>	<input checked="" type="checkbox"/>
24	Carlie's Retail Area	<input type="checkbox"/>		3 BR Pasta Buffet	Golf	<input checked="" type="checkbox"/>	<input type="checkbox"/>
4	Club Functions Ballroom	<input type="checkbox"/>		29 Ballroom Easter	Easter Buffet New	<input type="checkbox"/>	<input type="checkbox"/>
10	Club Functions Dining Rm	<input type="checkbox"/>		29 Dining Rm Easter	Easter Buffet New	<input type="checkbox"/>	<input type="checkbox"/>
11	Club Functions Hill-AGB	<input type="checkbox"/>		29 Hill-AGB Easter	Easter Buffet New	<input type="checkbox"/>	<input type="checkbox"/>
2	Dining Room	<input checked="" type="checkbox"/>		29 Robin FB	Main FnB By Carlie	<input type="checkbox"/>	<input checked="" type="checkbox"/>
6	Fitness	<input type="checkbox"/>		48	Fitness New	<input checked="" type="checkbox"/>	<input type="checkbox"/>
22	Golf	<input type="checkbox"/>	154 0		Golf	<input checked="" type="checkbox"/>	<input type="checkbox"/>
7	Grille	<input checked="" type="checkbox"/>		29 AGB Layout	Main F&B	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Retail Areas - Tab Overview

In this section we will review the various tabs within a Retail Area.

Area Setup



1. **Name** - Enter the **Name** of the Area.
2. **Description** - Enter an optional **Description** of the Area.
3. **Screen Group** - Select the **Screen Group/ Menu** to be displayed at POS for the Area.



Active Layout - Not applicable to Retail Areas.

Tab Payment - Not applicable to Retail Areas.

4. **POS Type** - For Retail Areas set this field to **Retail**.

- 5. **Department** - Select the **Department** to be associate with this Area (Required).
- 6. **Area Category** - Select the **Area Category** to be associated with this Area (Required).
- 7. **Manager** - Select the **Manager** of this Area using the lookup (Optional).

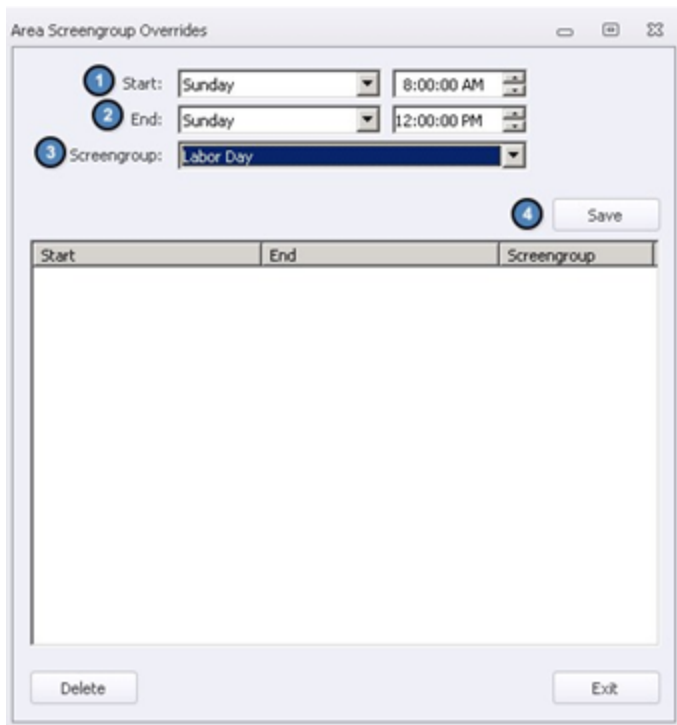
Display Order - Not applicable to Retail Areas.

- 8. **Schedule Overrides** - This allows the user to override the Screen Group that shows in the POS, during a certain time frame for this Area.

1 & 2) Enter the **Start** and **End Time** of the Schedule Override.

3) Select the **Screen Group** to show during this time frame.

4) Select **Save**.

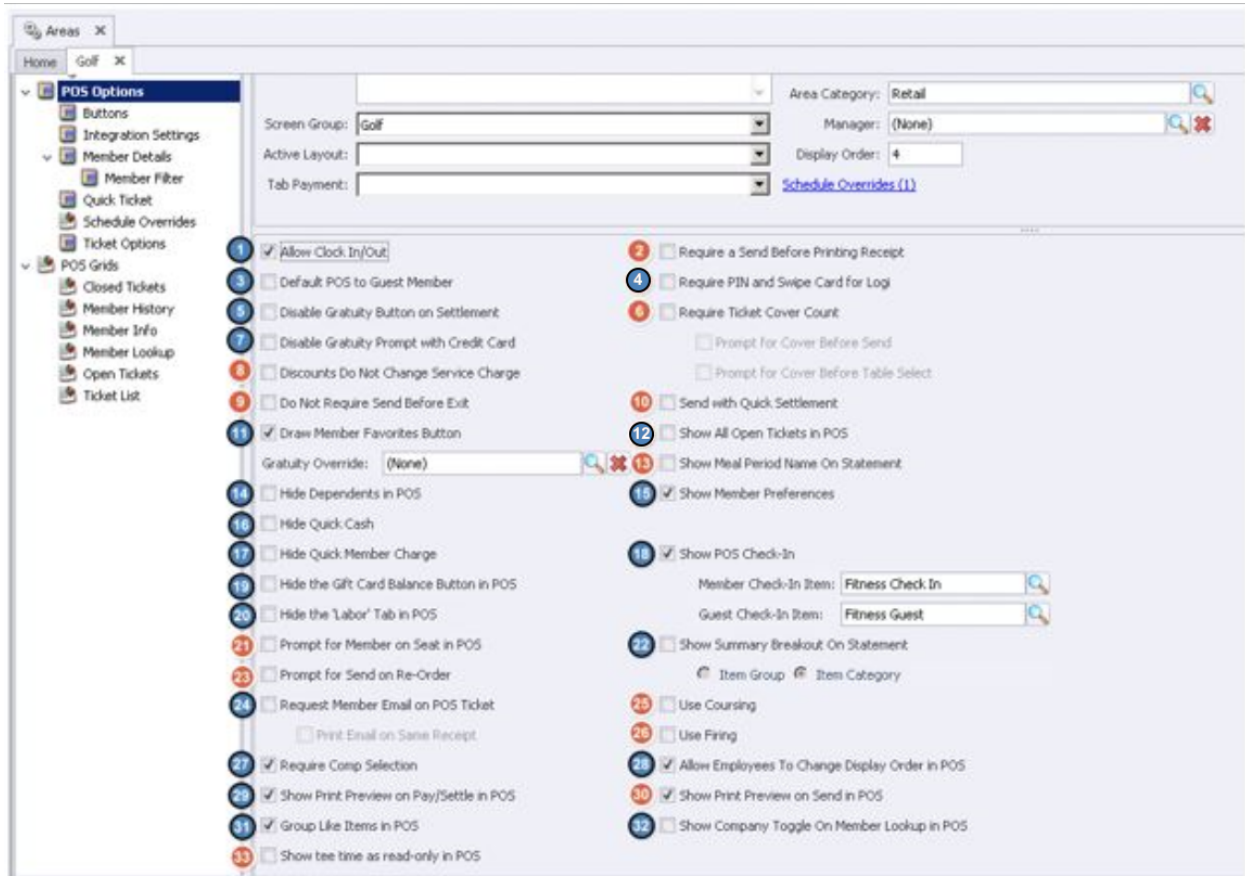


The screenshot shows a window titled "Area Screengroup Overrides". It has three numbered steps: 1) Start: Sunday, 8:00:00 AM; 2) End: Sunday, 12:00:00 PM; 3) Screengroup: Labor Day. A "Save" button is next to the Screengroup field. Below these fields is a table with columns "Start", "End", and "Screengroup". At the bottom are "Delete" and "Exit" buttons.

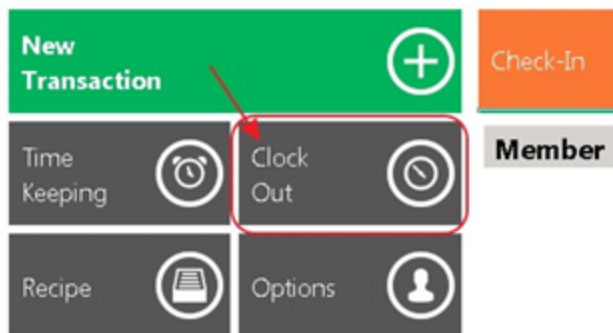
Start	End	Screengroup
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POS Options

Numbers highlighted in red 1 are not applicable to Retail Areas.

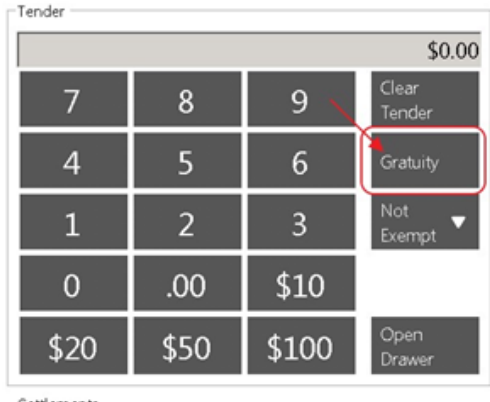


1. **Allow Clock In/Out** - Check if employees will be clocking in/out in this Area. When checked, a clock-out button will appear on the POS.

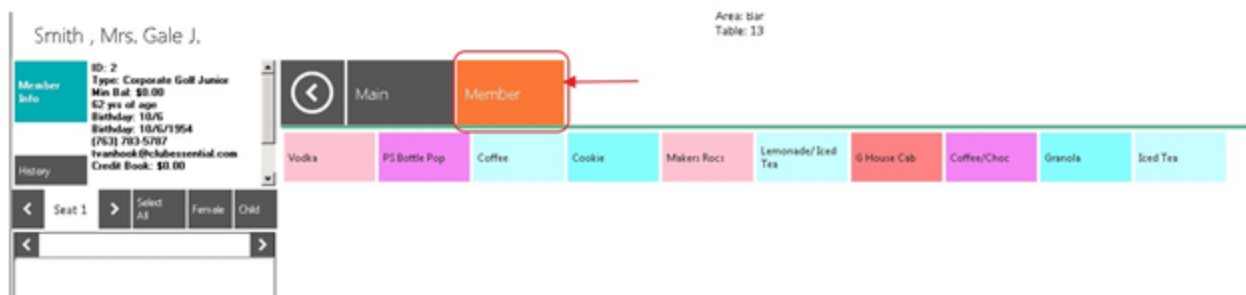


2. **Require a Send Before Printing Receipt** - Not applicable to Retail Areas.
3. **Default POS to Guest Member** - If checked, the POS will default to the Guest Member Account at the POS.

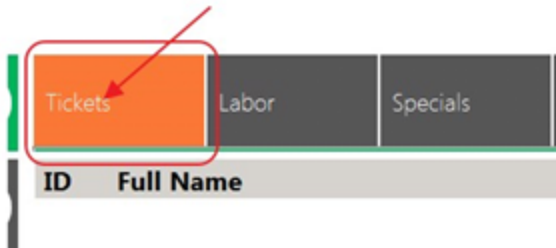
4. **Require PIN and Swipe Card for Login** - If checked, users are required to enter an ID to access POS.
5. **Disable Gratuity Button on Settlement** – If checked, the gratuity button on the settlement screen will not be accessible.



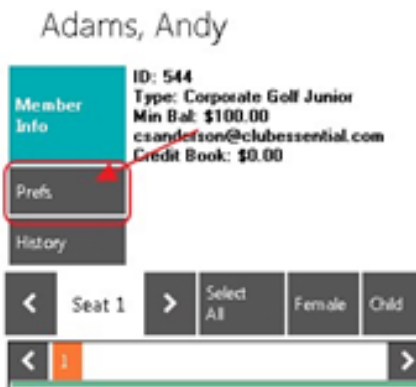
6. **Require Ticket Cover Count** – Not applicable to Retail Areas.
 - Prompt for Cover Before Send** - Not applicable to Retail Areas.
 - Prompt for Cover Before Table Select** - Not applicable to Retail Areas.
7. **Disable Gratuity Prompt with Credit Card** - If checked, user will not be prompted to enter a gratuity amount when tendering a transaction to credit card.
8. **Discounts Do Not Change Service Charge** - Not applicable to Retail Areas.
9. **Do Not Require Send Before Exit** - Not applicable to Retail Areas.
10. **Send With Quick Settlement** - Not applicable to Retail Areas.
11. **Draw Member Favorites Button** - If checked, an additional tab will populate called **Members** in the POS. This tab shows above the Screen Group when a member is selected. This tab will show the 10 most recent items the member has purchased.



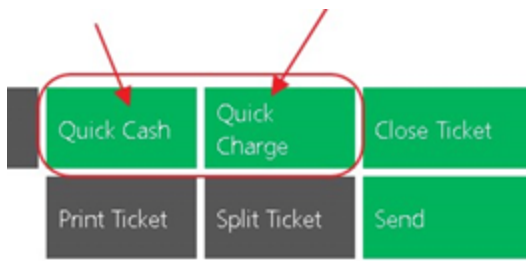
12. **Show all Open Tickets in POS** - When unchecked, users will only see their own tickets. Check this box to allow servers to see ALL open tickets.



13. **Show Meal Period Name on Statement** - Not applicable to Retail Areas.
14. **Hide Dependents in POS** - Removes all Dependents from the POS Member Look-up.
15. **Show Member Preferences** - If checked, Member Preferences will be accessible at POS.



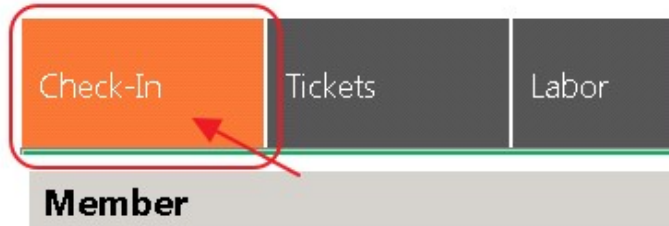
16. **Hide Quick Cash** - If checked, the Quick Cash button will not be accessible.
17. **Hide Quick Member Charge** - If checked, the Quick Member Charge button will not be accessible.



18. **Show POS Check-in** - This will display the check-in feature at POS. If the club has an area where members have to check-in (i.e. Fitness Area, Pool) this box will need to be checked for that area.

Member Check- In Item - Select the Item to be charged when a member checks in.

Guest Check- In Item - Select the Item to be charged when a guest checks in.



19. **Hide the gift card balance button in POS** - This will remove the 'Gift Card Balance' button in the POS.



20. **Hide the 'Labor' Tab in POS** - If checked, the user will not be able to see the Labor Tab in this Area.



21. **Prompt for member on seat in POS** - Not applicable to Retail Areas.

22. **Show Summary Breakout on Statement** - If checked, transactions can be broken out on statements either by **Item Group** or **Item Category** (Specific Items cannot be shown on a statement, Item Category is the lowest level that can be shown).

Note: If breaking out by **Item Category**, navigate to the **Statement Options Tab** and hit **Select All**. Any category not checked on this tab will show as **'Other'** on statements.



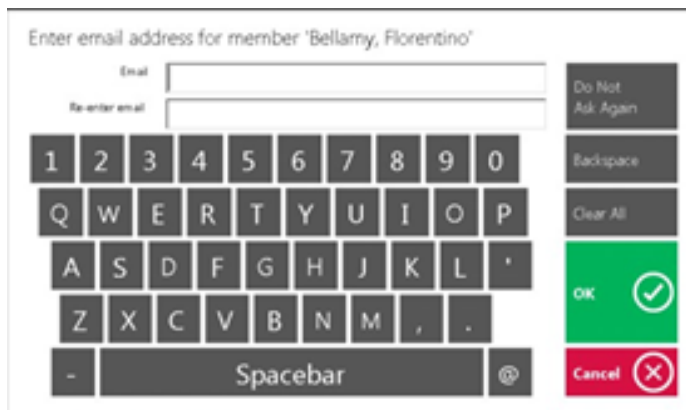
Please detach and return top portion with payment assessed beginning the 15th.

DATE	REFERENCE	DESCRIPTION	AMOUNT	SVC CHG	TAX	TOTAL
		Balance Forward				\$646.78
8/4/16	29240	Pool				
8/4/16		Guest Fees	-45.00	0.00	0.00	-\$45.00

23. **Prompt for Send on Re-Order** - Not applicable to Retail Areas.

24. **Request Member Email on POS ticket** - If checked, the user will be prompted to enter an email address if the member does not have one on file.

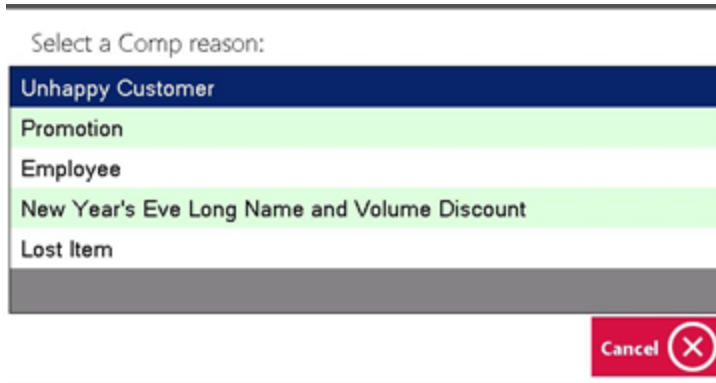
Print Email on Same Receipt - If checked, the email entered will print on the receipt.



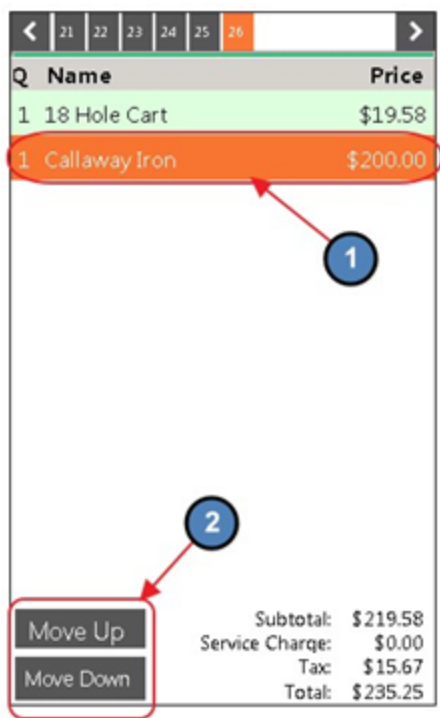
25. **Use Cursing** - Not applicable to Retail Areas.

26. **Use Firing** - Not applicable to Retail Areas.

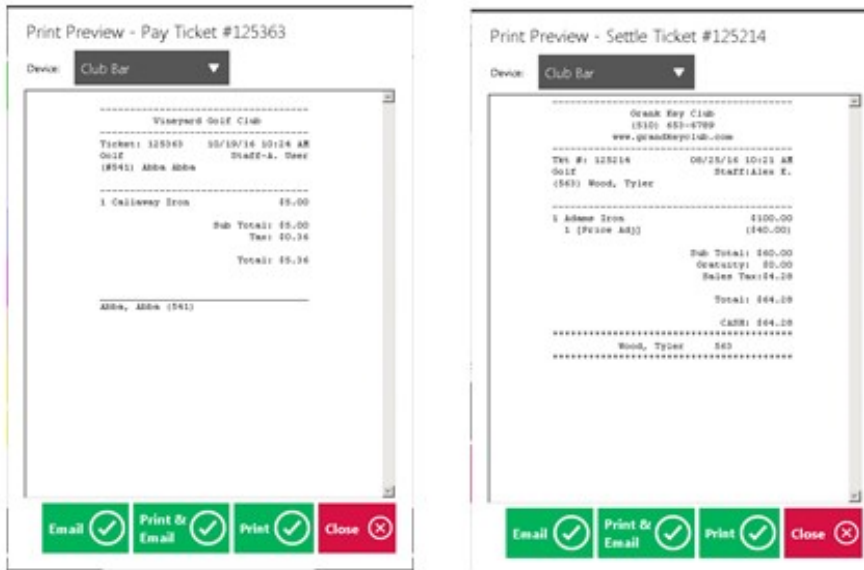
27. **Require Comp Selection** - If checked, the user is required to select a Comp reason when Comp Item is selected at the POS.



28. **Allow Employees to Change Display Order in POS** - If checked, a **Move Up/ Move Down** feature will be enabled to allow employees to adjust the order of the items appearing on a ticket in POS.



29. **Show Print Preview on Pay/Settle in POS** - If checked, the user will be shown a print preview of the print and settle ticket when their respective buttons are selected.

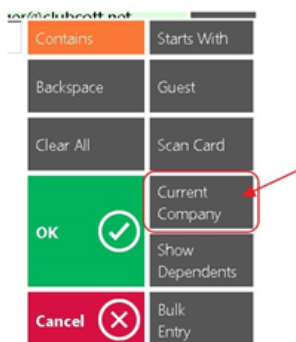


30. **Show Print Preview on Send in POS** - Not applicable to Retail Areas.

31. **Group Like Items at POS** - If checked, like items will be grouped together to create one line on the ticket in POS. For instance, if 2 of the same sleeves of balls are selected, rather than have 2 separate lines, the POS will group them together on 1 line.



32. **Show Company Toggle in Member Lookup at POS** - If a club has a multi-company setup and they want members from all companies to show in the POS, check this box to enable the **Company Toggle**.

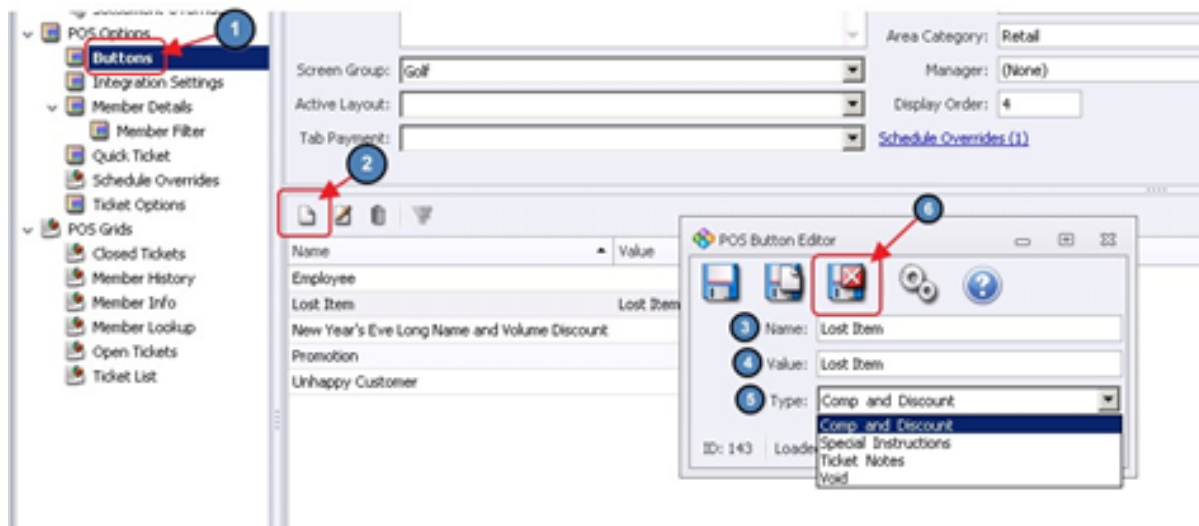


33. Show Tee-Time as Read Only at POS - Not applicable to Retail Areas.

Buttons

Standard Messages can be created to help quicken the transaction process at the POS. Retail Areas can include only **Comp and Discount** reasons.

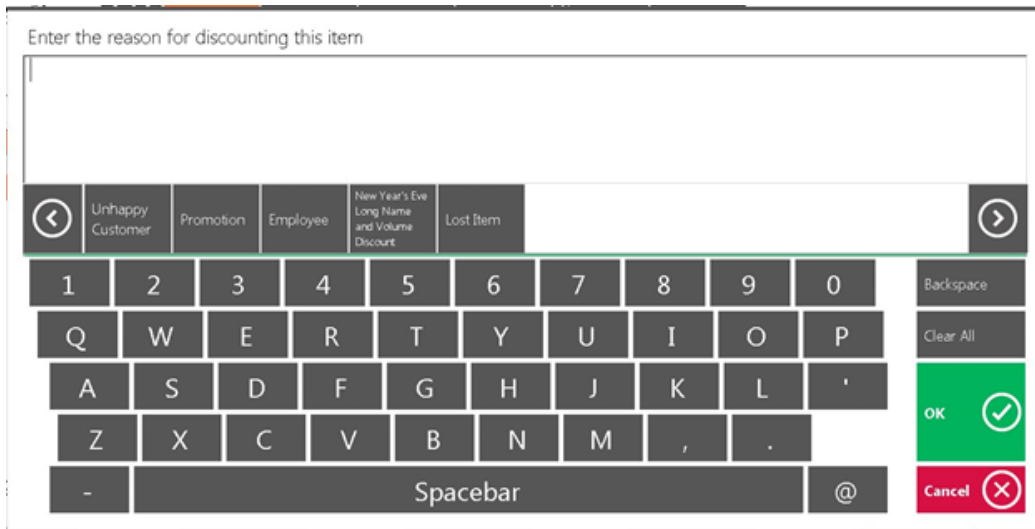
To create a new message, first navigate to the **Buttons** tab, select the New Icon, give the message a **Name**, **Value** (This is what will appear at the POS), and a **Type**. Lastly, select Save & Close when finished.



Comp and Discount

Standard Comp and Discount reasons can be added. Any Button with a **Type** of **Comp and Discount** will appear when the **Comp Item** and **Discount Item** buttons are selected at the POS.





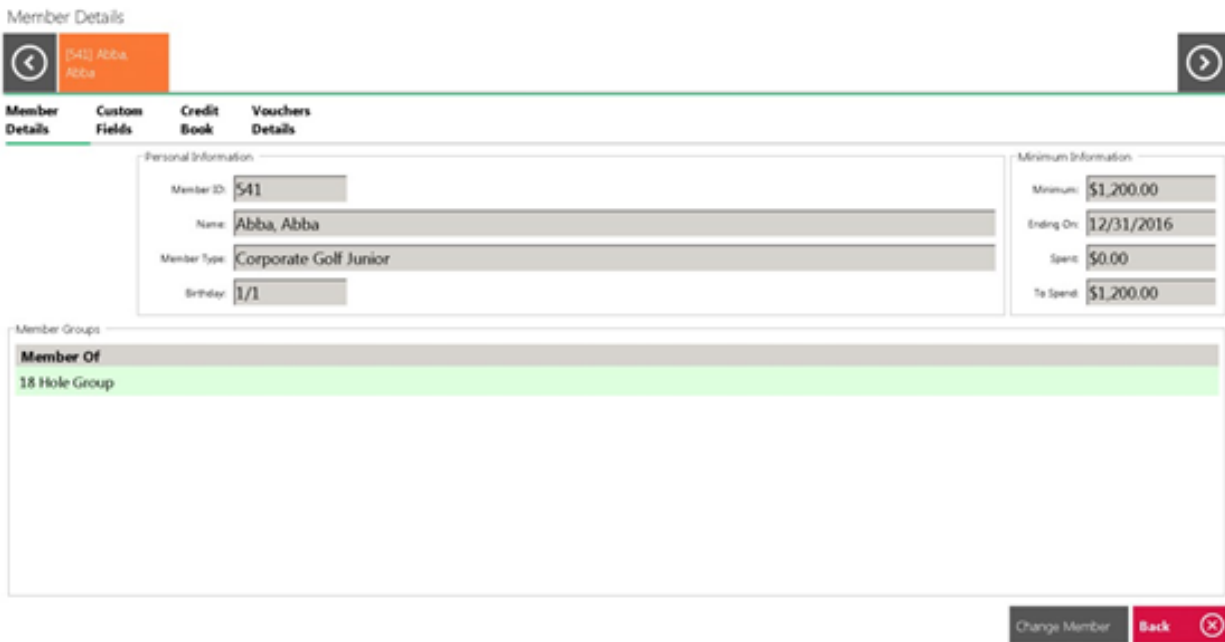
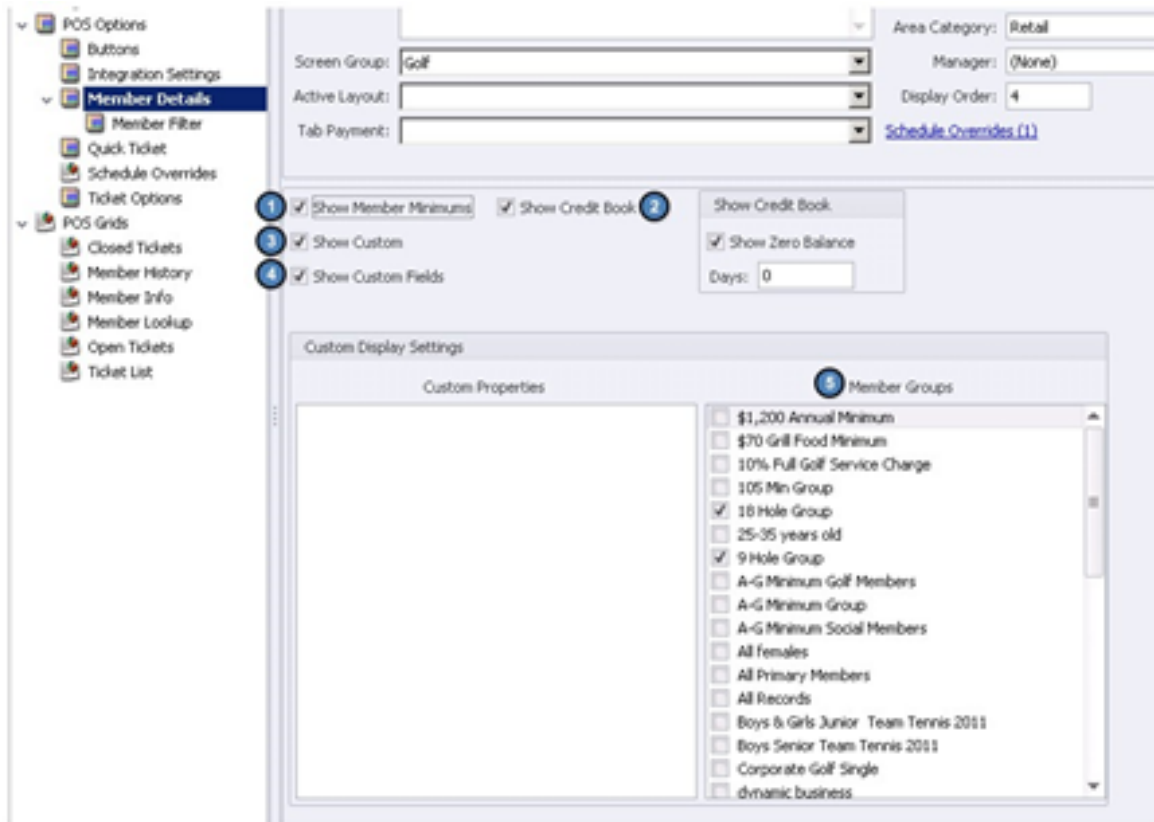
Member Detail

The **Member Details** tab allows the user to configure the information that shows when Member Info is selected at the POS.



Options Include:

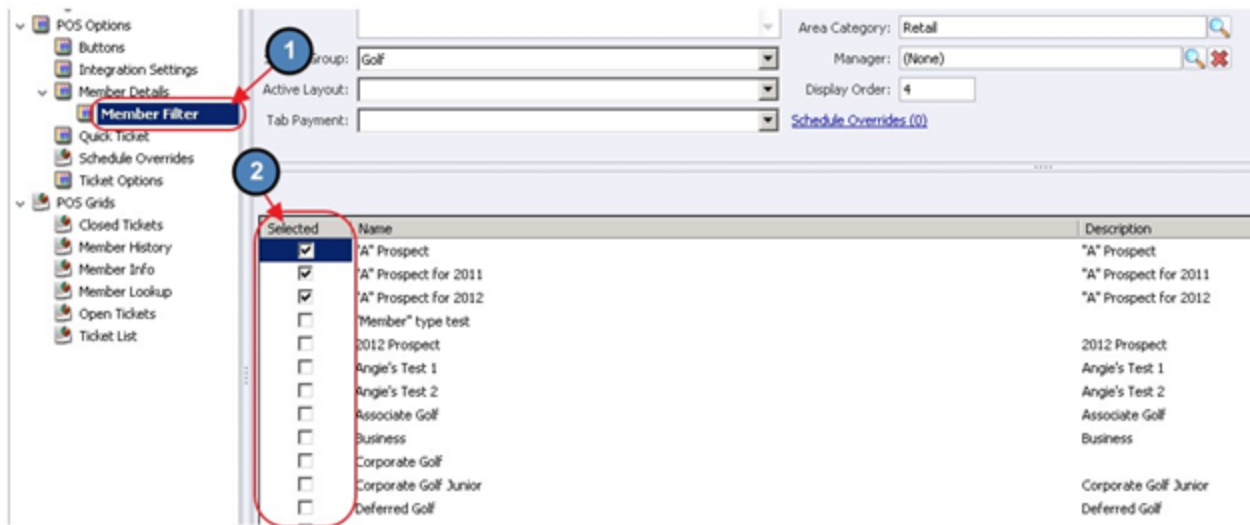
- Show Member Minimums
- Show Credit Book
- Show Custom
- Show Custom Fields
- Member Groups



Member Filter

The **Member Filter** Tab allows the user to omit certain Member Types from showing in the POS.

To apply this feature, select the correct Area and navigate to the **Member Filter** Tab. Select the Applicable **Member Types**. Any members within the Member Types selected on this screen will not show in the POS for the Area they are selected.

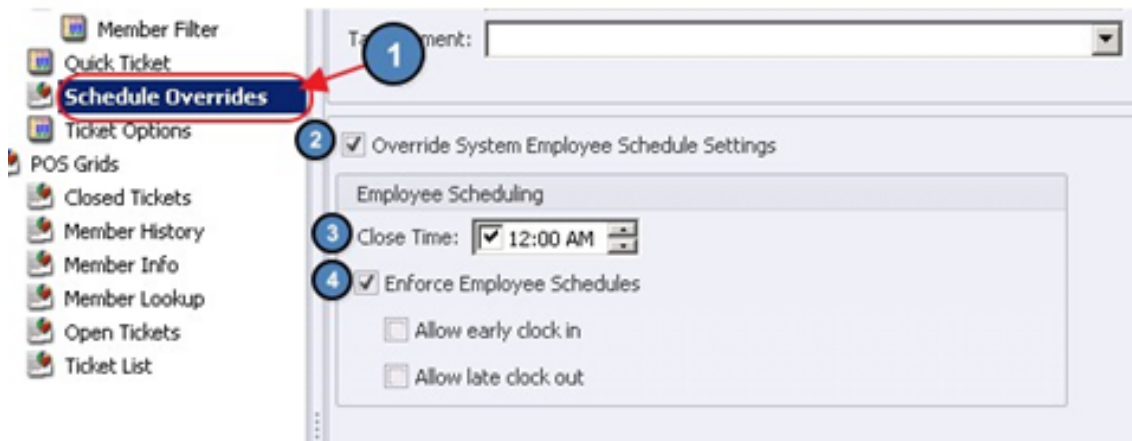


Quick Ticket

Not applicable to Retail Areas.

Schedule Overrides

If the Employee Scheduling Module is utilized and the user would like to override the system set employee scheduling rules, please select the **Override System Employee Schedule Settings** check box.



Once selected, additional options will populate. Options include:

Close Time - This is the time the Area closes.

Enforce Employee Schedule - If schedules are not currently set to be enforced on a system wide basis and the user would like this Area to enforce employee schedules, check **Enforce Employee Schedules**.

Allow early clock in - If checked, please specify how many minutes in advance users can clock in.

Allow late clock out - If checked, please specify how many minutes late an employee can clock out.

Ticket Options

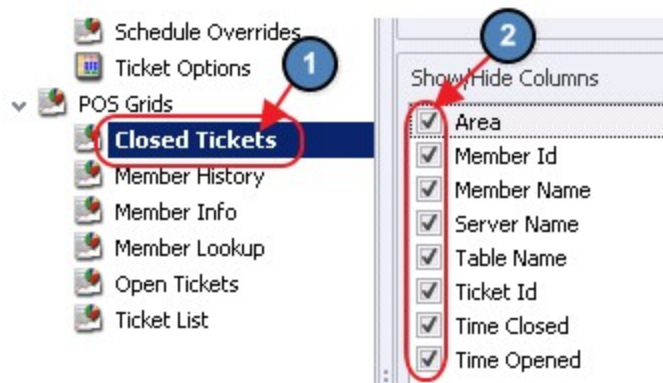
The **Ticket Options** tab is where the Send, Pay, and Settle Ticket templates are applied. Please contact Clubessential Support for more information on this tab.

POS Grids

To add/ remove columns from the various grids within the POS, please see the below instructions on each specific grid.

Closed Tickets

To add/ remove columns on the **Closed Tickets** screen in System Tools, please navigate to the **Closed Tickets** Tab and check/ uncheck the applicable columns. Available columns are included in the screenshot below.



System Tools

Locked Tickets Open Tickets **Closed Tickets** Items Reports Utilities About

Search

Area	Member	Server	Member #	Ticket	Table	Date Opened	Date Closed
Grille	Behrens, Mr. Haywood	Julie Middleton	6	648	32	2/19/2009 8:46 PM	3/15/2016
Grille	Behrens, Mr. Haywood	Julie Middleton	6	648	32	2/19/2009 8:46 PM	3/15/2016
Dining Room	Mcarthur, Mr. Quincy	Cindy Holwell	44	1362	11	3/15/2009 12:57 PM	3/15/2016
Dining Room	Mcarthur, Mr. Quincy	Cindy Holwell	44	1362	11	3/15/2009 12:57 PM	3/15/2016
Club Functions Ballroom	Rudolph, Mr. Darrick	Krista Doerdal	5	2547	104	4/12/2009 8:02 AM	3/15/2016
Club Functions Ballroom	Rudolph, Mr. Darrick	Krista Doerdal	5	2547	104	4/12/2009 8:02 AM	3/15/2016

Member History

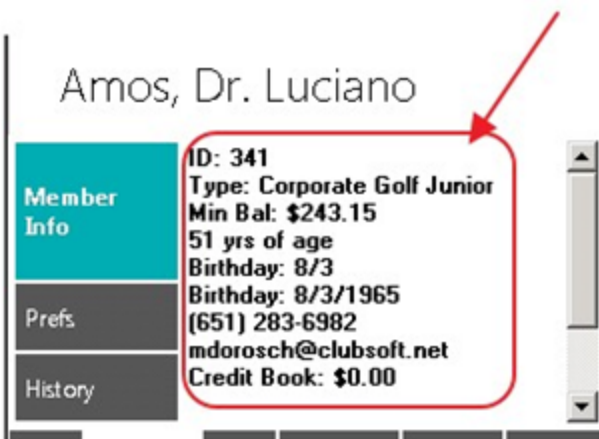
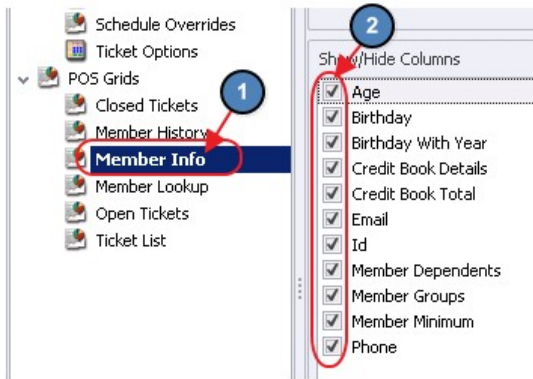
To add/ remove columns on the **Member History** screen, please navigate to the **Member History** Tab and check/ uncheck the applicable columns. Available columns are included in the screenshot below.

Adams, Andy

Member Info	ID: 544 Type: Corporate Golf Junior Min Bal: \$100.00 csanderson@clubessential.com Credit Book: \$0.00
Prefs	
History	

Member Info

To add/ remove information next to the **Member Info** button, please navigate to the **Member Info** Tab and check/uncheck the applicable columns. Available columns are included in the screenshot below.



Member Lookup

To add/ remove columns on the **Member Lookup** screen, please navigate to the **Member Lookup** Tab. Current Visible Columns are on the left, and Available Columns are on the right. Assign a column by selecting an Available column and clicking on the Left Arrow. Conversely, to un-assign a column, click on the Assigned column, and then click the Right Arrow.

The order the columns appear at the POS can be arranged using the **Move Up/ Move Down** feature at the bottom of the selected Visible Columns.



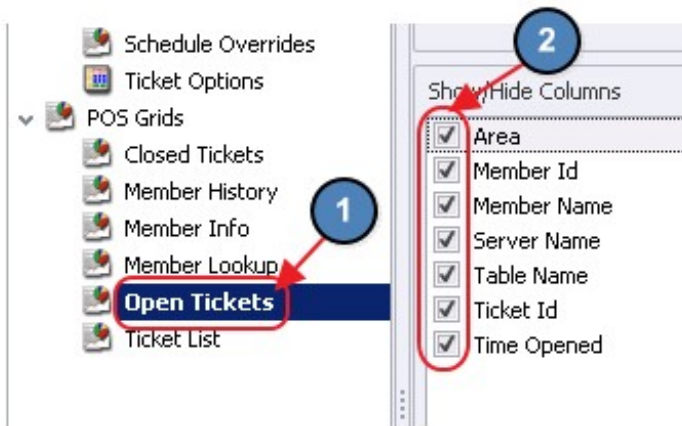
Find Member

Member Number	Full Name	Age	Member Status	Member Type	Email
541	Abba, Abba		Active	Corporate Golf Junior	csanderson@clubessential.com
544	Adams, Andy		Active	Corporate Golf Junior	csanderson@clubessential.com
3117	Altman, Gema		Other Clubs	Other Clubs	
1002	Alvarado, Kenneth	61	Active	Corporate Golf Junior	s3e@clubsoft.net
223	Amato, Coy	55	Active	Corporate Golf Junior	mllong@clubsoft.net
152	Amato, Thurman	59	Active	Corporate Golf Junior	jmalecha@clubsoft.net
341	Amos, Luciano	51	Active	Corporate Golf Junior	mdorosch@clubsoft.net
3111	Anglin, Deedee		Other Clubs	Other Clubs	
3167	Aponte, Mama		Other Clubs	Other Clubs	
5014	Azanda, Benedict	59	Resigned	Senior Golf	
407	Avonizio, Danoff	00	Active	Senior Golf	mdorosch@clubsoft.net

Virtual keyboard overlay with buttons for navigation and actions like 'OK', 'Cancel', 'Starts With', 'Guest', 'Scan Card', 'Current Company', 'Show Dependents', and 'Bulk Entry'.

Open Tickets

To add/ remove columns on the **Open Tickets** screen in **System Tools**, please navigate to the **Open Tickets** Tab and check/ uncheck the applicable columns. Available columns are included in the screenshot below.



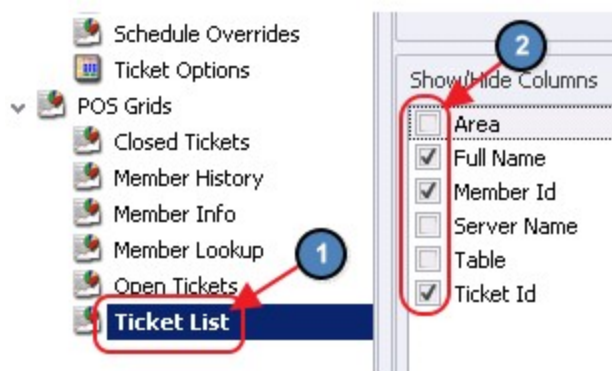
System Tools

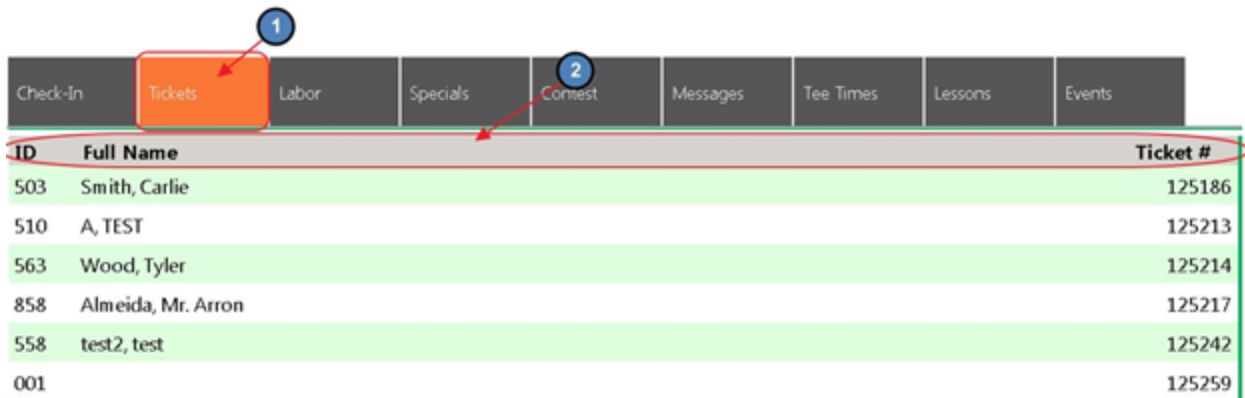
Locked Tickets **Open Tickets** Closed Tickets Items Reports Utilities About

Area	Member	Server	Member ID	Ticket	Table	Date Opened
Golf	Guest,	Administrative User	001	125259		8/30/2016 3:23 PM
Dining Room	Abbott, Ben M.	Administrative User	1000B	125274	Table 19	8/31/2016 11:00 AM
Dining Room	Abbott, Shayne	Administrative User	1000C	125275	Table 19	8/31/2016 11:00 AM
Golf	Guest,	Administrative User	001	125276		8/31/2016 1:32 PM
Dining Room	Abbott, Ben M.	Administrative User	1000B	125277	Table 18	8/31/2016 2:34 PM
Dining Room	Smith, Mrs. Gale J.	Administrative User	2	125278	Round 38	9/1/2016 8:17 AM

Ticket List

To add/ remove columns on the main **Ticket List** screen, please navigate to the **Ticket List** Tab and check/ uncheck the applicable columns. Available columns are included in the screenshot below.





ID	Full Name	Ticket #
503	Smith, Carlie	125186
510	A, TEST	125213
563	Wood, Tyler	125214
858	Almeida, Mr. Arron	125217
558	test2, test	125242
001		125259

Best Practices

When setting up areas, ensure the settings in the system, align with the best possible operational flow of your respective Retail area. If settings are not necessary/used, ensure they are disabled to prevent staff from clicking unnecessary buttons.

Use settings to provide opportunities for your staff to enhance the Member experience. Settings such as Member Info, Member Preferences, and Member History can increase your staff's ability to provide a better level of service to your Members.

FAQs

When settings are changed in the POS, do users need to exit out, and log back into the POS for the changes to take effect?

Yes, once changes are made, ensure users exit, and log in to a new POS session to ensure change(s) in settings take effect.