

# Retail POS Manual

2016 - Fall Edition

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# Overview

In this manual, we will discuss the various functionalities within our Retail POS System.

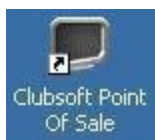
## Use Case(s)

The Retail POS system is used in Golf Shops, and other areas of the Club (Spa, for instance), where retail goods (or services) are transacted.

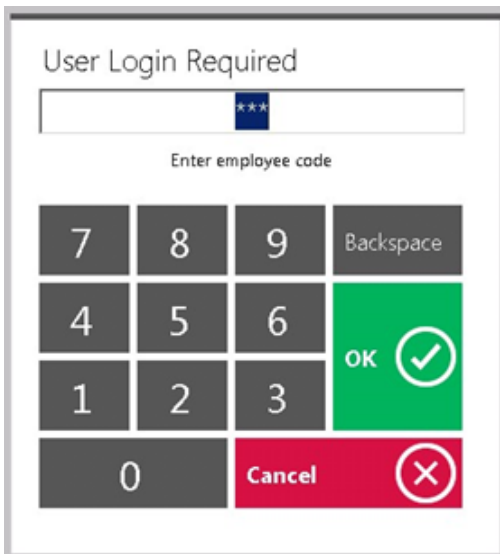
## Accessing the Tool

To access the POS,

- 1) Click on the **POS Icon**.



- 2) A logo will display moving around the screen, click anywhere on the screen to get the user login prompt. Enter your Employee **Swipe Id** (the number assigned to each user).

A screenshot of a user login screen. At the top, it says "User Login Required". Below that is a text input field containing three asterisks "\*\*\*". Underneath the field is the instruction "Enter employee code". The screen features a numeric keypad with buttons for digits 0-9, a "Backspace" button, a green "OK" button with a checkmark, and a red "Cancel" button with an "X" icon.

If you are using the Office system to **track hours**, an additional screen will display prompting the user to select a **Job Code**.

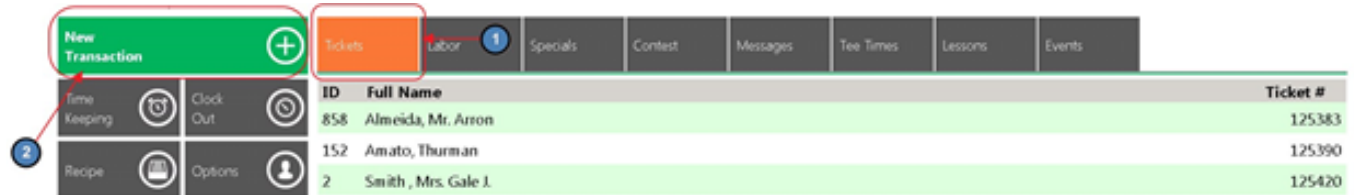


If the user only has one Job Code assigned to their employee profile, it will display “**you have successfully logged in**”.

## Opening a Ticket

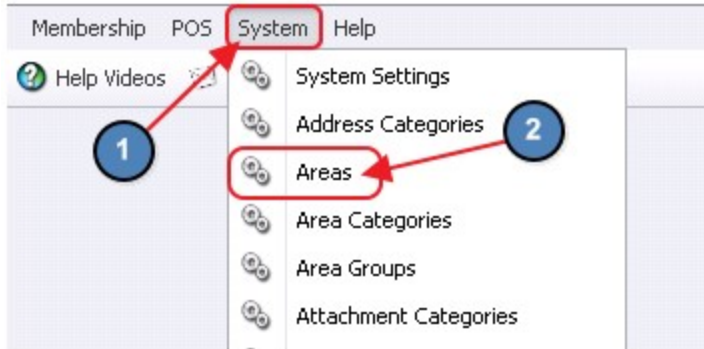
In this section we will discuss the necessary procedures to follow when opening a ticket.

- 1) If you have any open tickets they will be displayed on the **Tickets Tab**: you can touch or mouse click to open the ticket.
- 2) To open a new ticket, click on the green **New Transaction** button.



**Notes:**

- The **Tickets** screen should be **blank** before running the **End of Shift Report**.
- The **Tickets** display can vary depending on what columns you want to see. Columns can be removed or added in **CMA**. To do so, please navigate to **System** across the top toolbar and choose **Areas**.



Double click on the Area in question and navigate to the **Open Tickets** tab on the left pane. Once on the **Open Tickets** tab, select/unselect the column headers that you would like to see.



- 3) **Member Lookup** - Enter the Member Number or Member Name. If this is not a member, select **Guest**.

As you are typing the number or name, the screen will display the results. Highlight the member to be assigned to the ticket and hit **Enter**, or touch the member name, or mouse click on the name to select.

Find Member

Full Name	Member Number	Member Type	Age
Smith, Gale	2	Corporate Golf Junior	62
Smith, Carlie	503	Corporate Golf Junior	36
Smith, Gillian	3106	Other Clubs	
Smith, Joe	546	Social	
Smith, John	508	Senior Golf	
Smith, John	518	Corporate Golf Junior	
Smith, Martha	1000	Corporate Golf Junior	47
Smith, Rita	3239-1	Sp-Junior Corporate Golf	

smith

1	2	3	4	5	6	7	8	9	0
Q	W	E	R	T	Y	U	I	O	P
A	S	D	F	G	H	J	K	L	'
Z	X	C	V	B	N	M	,	.	
-	Spacebar								@

Contains	Starts With
Backspace	Guest
Clear All	Scan Card
OK	Show Dependents
Cancel	Bulk Entry

**Notes:**

Contains	Starts With
Backspace	Guest
Clear All	Scan Card
OK	Hide Dependents
Cancel	Bulk Entry

- If the **Contains** button is highlighted, the system will search all name columns displayed on the screen that meets the search criteria including First name, Last name, and Member Type.

**Example:** if you key in John, the system will display all the names that have John in the first or last name such as John, Johnson, Johnnie, etc, or if you key in the name of the Member Type only those members in that type will display. **This is the preferred setting.**

- If the **Starts With** button is highlighted, the system will only look at the beginning of how the Name is displayed.

**Example:** if the name is displayed as Aaron, Amy R your search criteria will need be Aaron (not Amy). This is not the preferred setting and often is a support call because a server accidentally hit the **Starts With** button.

- The **Hide Dependent** button gives user the option to filter out the dependents and spouses from the member display.
- You can sort the screen by each column by touching or clicking the column heading.

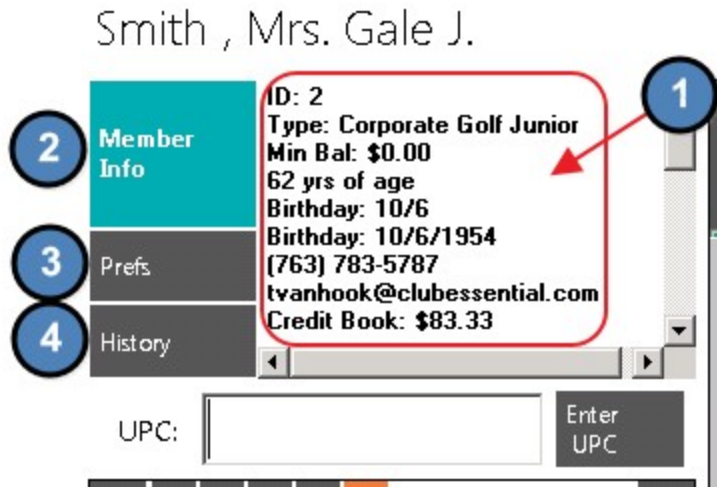
## Navigating the POS Screen



**Note:** There are important areas to point out on the POS screen.

- **Top Left Corner** – The information viewed here can be customized using the information in the member file. Each sales Area can display different information. There is various member information available for display (this will

be discussed in more details in Area setup). If you click on **Member Info** the system will take you to additional information about the member and family. **Prefs** is an area you can add information about the member such as favorite clubs, color, etc. **History** will show closed tickets from current day and previous days.



- **Top 1<sup>st</sup> Line** – Displays **Area** and **Ticket Number**.

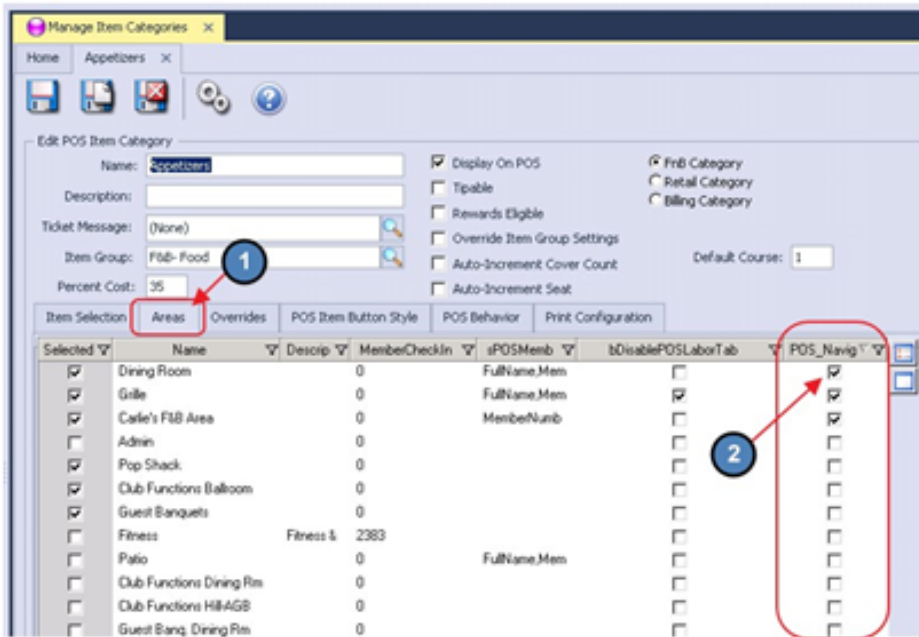


- **Top 2<sup>nd</sup> Line** – User can choose what **Item Categories** to be listed on the bar for quick access.

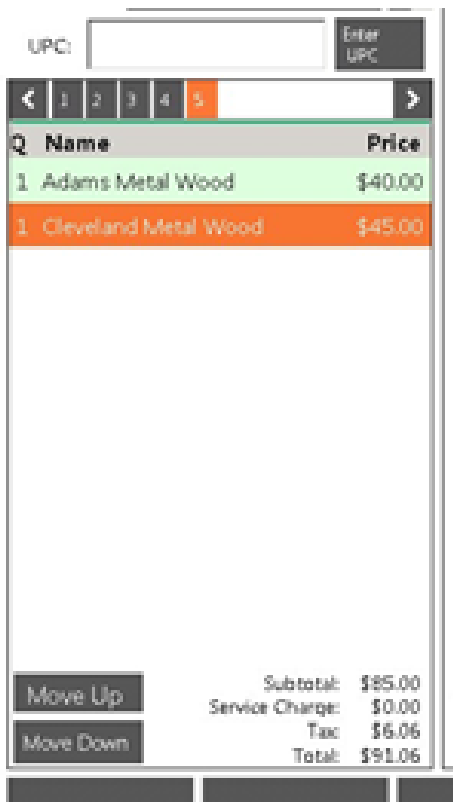


This setting is found in **Manage Item Categories**. Select the Item Category in Question and Navigate to the **Areas** tab. Then, select the **POS\_Navigation** column (last column to the right); next to the Areas to display the category at the top of the POS screen.





- **Left Middle** – Is the Ordering Screen; it lists the items that have been rung up.



- **Middle** – The Screen Group Layout is user defined: buttons can be setup to access a single Item, Item Category, Combo, single Modifier, Modifier Group, or another Screen Group.



- **Bottom** – The buttons across the bottom of the screen are system defined and triggers different functionality; see below for a brief and then more in-depth description of each button.



## POS Main Button Functionality

### Top Row

1. **Lookup Item** - Allows you to look up an item that has not been set up on the POS screen layout.
2. **Remove Item** - User can delete an item from the order.
3. **Delete Ticket** - Will delete current ticket.

4. [Change Qty](#) - User can change the QTY on an item (including making quantity negative for a credit).
5. [Discount Item](#) - Gives users the ability to discount an item. Requires security rights.
6. [Comp Item](#) - Give users the ability to comp an item. Requires security rights.
7. [Add Ticket](#) - Gives the ability to open another ticket without exiting the POS before completing the first ticket. You can move back and forth to all open tickets from the POS screen.
8. [Change Member](#) - Used if the member to be billed needs to change for any reason.
9. [Upcharge Item](#) - Will prompt for an amount to override and increase the price of the item.
10. [Quick Cash](#) - One step process to close the ticket to Cash.
11. [Quick Charge](#) - One step process to close the ticket to Cash.
12. [Close Ticket](#) - Take users to a settlement screen with more closing options.

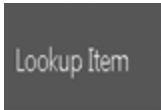
#### **Bottom Row**

13. [Exit](#) - Will exit the POS screen back to the main screen.
14. [Change Price](#) - Gives users the ability to reduce the price without using a discount.
15. [Duplicate Ticket](#) - Ability to create a duplicate ticket from another displayed ticket. This is useful if several members are to be charged the exact items.
16. [Multi Off](#) - Used in conjunction with Remove Item, Discount Item, and Comp Item; when (ON) users can select multiple Items.
17. [Split Ticket](#) - Used if more than one ticket is required on a transaction and to edit separate tickets.
18. [Coupon Lookup](#) - This button will turn Green to alert the server if the member has a promo coupon available to redeem.
19. [Print Ticket](#) - Prints the pay receipt ticket for signature prior to closing the ticket.

## Lookup Item

Allows you to look up an item that has not been set up on the POS screen layout.

- 1) Select **Lookup Item**.



- 2) Enter the **Item Name** in the search field and click or touch to select the Item.

Item Lookup

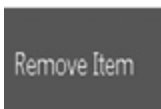
Name	Price	SKU	OnHand/Avail
Aclans Iron	\$0.00	100011068	Show
Callaway Iron	\$0.00	100011069	
Cleveland Iron	\$0.00	100011070	
Misc. Iron	\$0.00	100011072	
Mizuno Iron	\$0.00	100011071	
Ping Iron	\$0.00	100011074	
Taylor Made Iron	\$0.00	100011075	
Titleist Iron	\$0.00	100011779	



## Remove Item

User can delete an item from the order.

- 1) Highlight the Item to be removed from the ticket and click **Remove Item**.

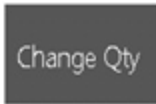


**Note:** If you have more than one item to delete follow the [Multi-Select \(On\)](#) instructions.

## Change Qty

User can change the QTY on an item (including making quantity negative for a credit).

- 1) Highlight the Item and click **Change QTY**.



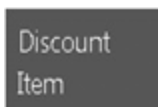
- 2) Enter QTY. When entering a negative QTY, select the **minus (-) sign** first and then select the amount of the negative QTY. Use the **More** option to enter quantities greater than 19.



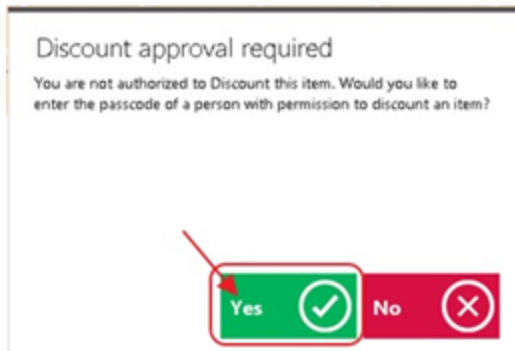
## Discount Item

Gives users the ability to discount an item. Requires security rights.

- 1) Highlight the item to discount and click **Discount Item**.



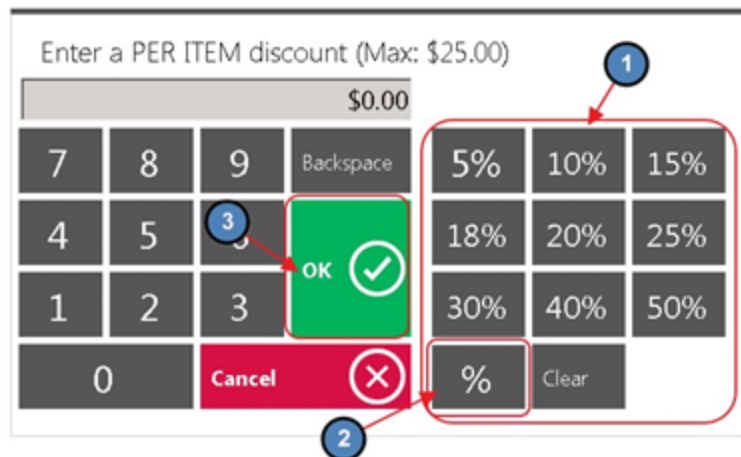
- 2) A message box will pop up if you do not have security rights to Discount. You will need to get a manager to continue. Select **YES** and **Enter Pass Code**.



- 3) Select a **Discount reason** or key in a reason. **Discount reasons** are optional, if you do not get this prompt then you are not setup to track reasons. For more information on setting up **Discount reasons**, please refer to the **Buttons** section of our **Retail Areas** manual.



- 4) Enter the Discount (on the right side are pre-set percentages, if none of these are what you want click on the % sign to manually enter the desired percentage). If it is a flat dollar discount amount, then use the numbers on the left of the screen. Click **OK** when finished.

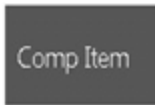


**Note:** If you have more than one item to delete follow the [Multi-Select \(On\)](#) instructions.

## Comp Item

Give users the ability to comp an item. Requires security rights.

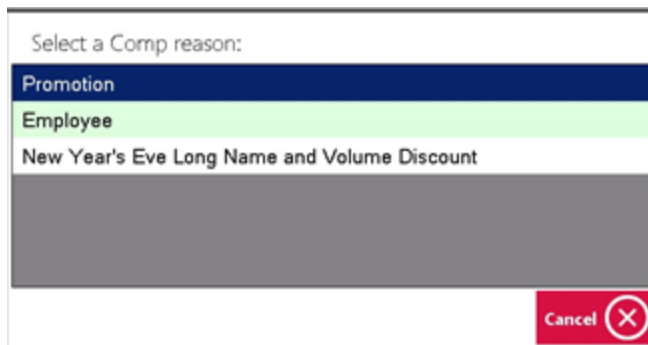
- 1) Highlight the item to comp and click **Comp Item**, the system will discount the item 100%.



- 2) A message box will pop up if you do not have security rights to comp. You will need to get a manager to continue. Select **YES** and **Enter Pass Code**.



- 3) Select a **Comp reason** or key in a reason. **Comp reasons** are optional, if you do not get this prompt then you are not setup to track reasons. For more information on setting up Comp reasons, please refer to the **Buttons** section of our **Retail Areas** manual.

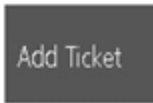


**Note:** If you have more than one item to delete follow the [Multi-Select \(On\)](#) instructions.

## Add Ticket

Gives the ability to open another ticket without exiting the POS before completing the first ticket. You can move back and forth to all open tickets from the POS screen.

- 1) Click **Add Ticket**.



- 2) Search and select the member or select **Guest** if this is not a member.



- 3) If you have more than 1 ticket open you will see buttons labeled 1, 2, 3, etc. For each ticket, click on the button you wish to work with.





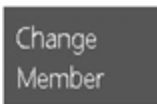
**Notes:**

- User can see what member is assigned to a ticket by the information at the top left corner; which will show member number and name. Other information displayed is also specific to the member on the ticket.
- There is no limit to how many tickets you can have open.

## Change Member

Used if the member to be billed needs to change for any reason.

- 1) Click on **Change Member**.



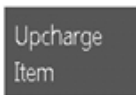
- 2) Search by name or member number, Highlight the member and click **OK**, or double click the member.



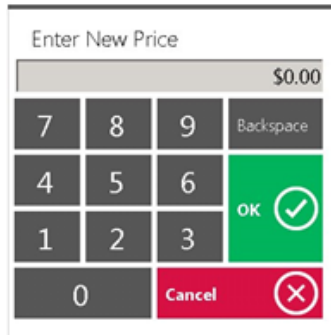
## Upcharge Item

Will prompt for an amount to override and increase the price of the item.

- 1) Highlight the Item, click **Upcharge Item**.



2) Enter the amount to override the price.



**Note:** The amount entered must be greater than the item price. If you want to decrease the price use the **Change Price** or **Discount** option.

### Quick Settlements

There are two settlement types available for closing the ticket with one step, Cash and Member Charge. These options do not give you the ability to add additional tip, get change amount, or split tender. For more closing capabilities select **Close Ticket**.

In the POS ordering screen, select **Quick Cash** or **Quick Charge**.

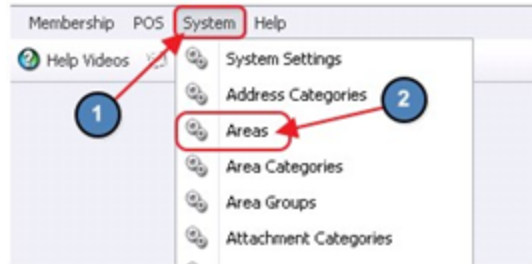


#### Notes:

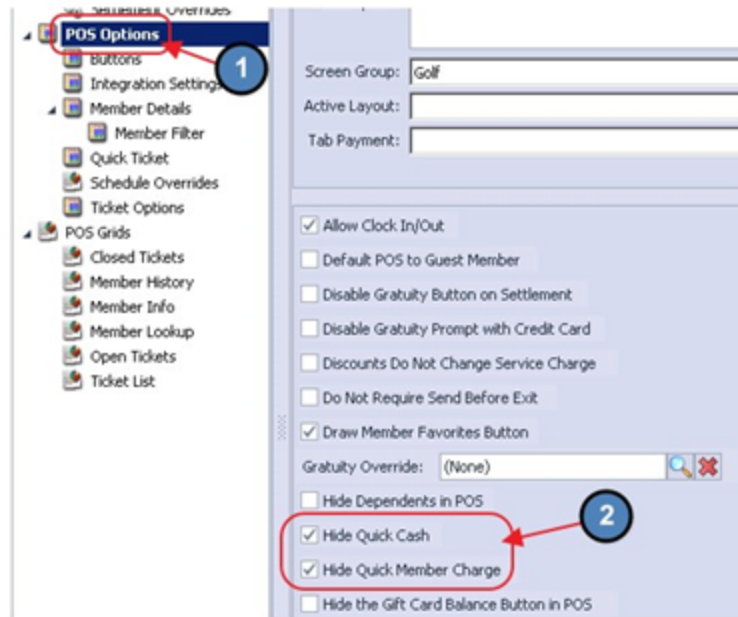
- Quick Cash will not give you the option to key in the amount of money for change back; it will close the ticket for the exact amount owing.
- Quick Settlement is a one step process and will not give you any other options in closing the ticket like adding additional gratuity or split tender. For more closing capabilities select **Close Ticket** instead.
- A Settlement Ticket is similar to the pay receipt except it includes the settlement details on the printed ticket.
- You have the option to hide the Quick Settlement Types from the POS by Area, or to suppress printing a settlement ticket by POS Terminal.

To hide the Quick Settlements Types from the POS by **Area**,

- 1) In CMA, please navigate to **System** across the top toolbar and choose **Areas**.

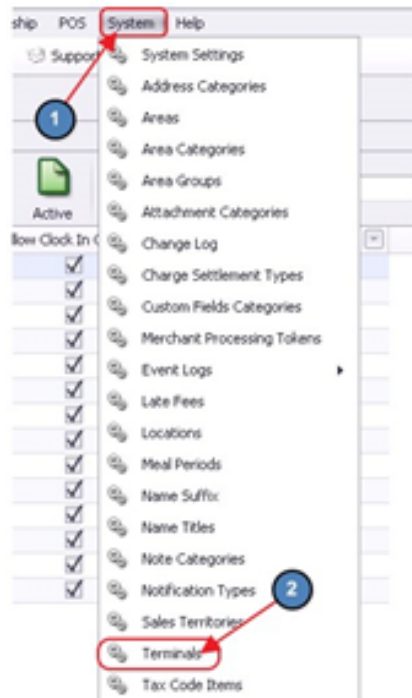


- 2) Double click on the Area in question and navigate to the **POS Options** tab on the left pane. Once on the **POS Options** tab, select the **Hide Quick Cash/ Quick Member Charge** check box. This will remove the Quick Settlements from the Area specified.

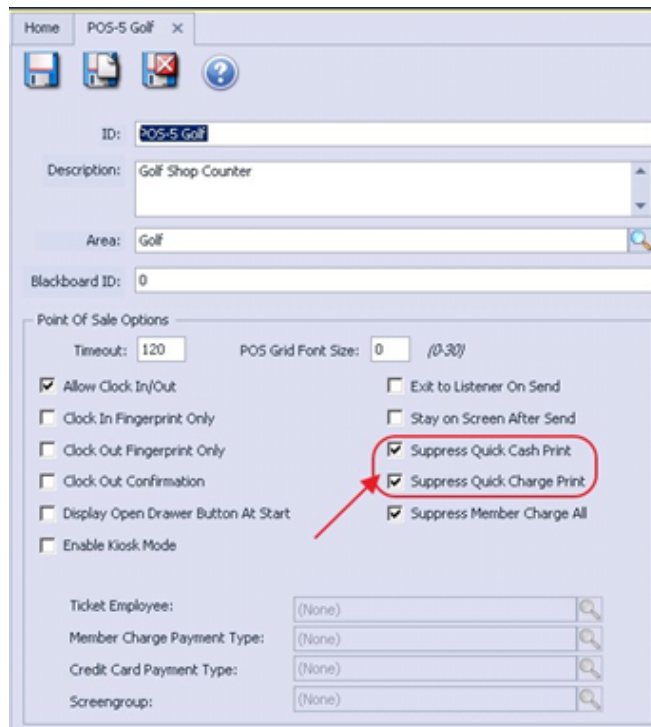


To suppress printing a settlement ticket by POS Terminal,

- 1) In CMA, please navigate to **System** across the top toolbar and select **Terminals**.

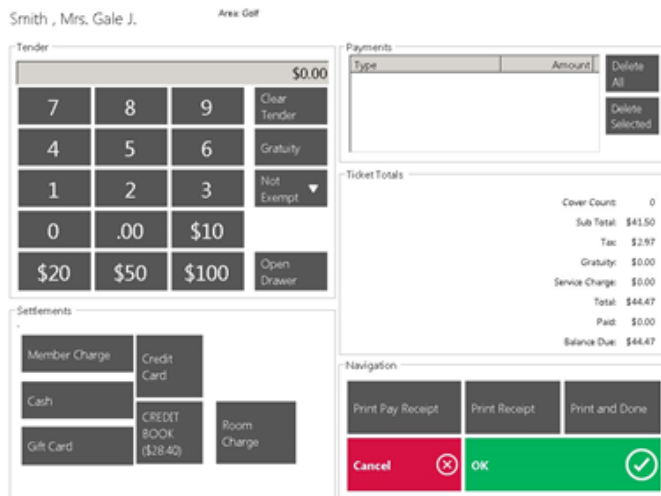


- 2) Double click on the **Terminal** in question, and put a check mark on **Suppress Quick Cash Print or Charge**. This will prevent a settle ticket from printing when the Quick Settlements are selected.



## Close Ticket

The **Close Ticket** function gives you additional options on how the ticket is settled. In this section we will cover the various options available.

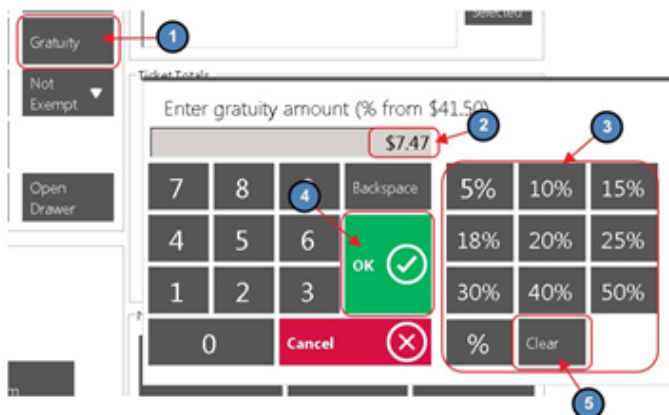


### Tender Keypad

Top left corner of the screen is the **Tender keypad**.

- 1) **Gratuity** - Select the **Gratuity** button and you will get the **Gratuity Prompt**. Enter the Gratuity amount (or percentage as applicable) and click **OK**.

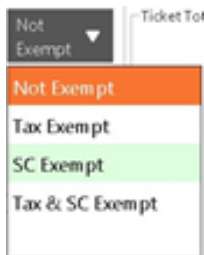
**Note:** Select **Clear** on the Gratuity Prompt to clear any wrongly entered Gratuity.



You will see the added gratuity in the **Ticket Totals** section.

Ticket Totals	
Cover Count:	0
Sub Total:	\$41.50
Tax:	\$2.97
Gratuity:	\$7.47
Service Charge:	\$0.00
Total:	\$51.94
Paid:	\$0.00
Balance Due:	\$51.94

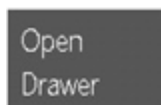
- 2) **Tax/Service Charge Exempt** - Select drop down arrow next to **Not Exempt** and a list of exemptible features will display. Select the option relevant to the current charge (requires security rights).



Options Include:

- Not Exempt
- Tax Exempt
- Service Charge (SC) Exempt
- Tax & Service Charge (SC) Exempt

- 3) **Open Cash Drawer** will open the cash drawer before completing the settlement.



- 4) **Clear Tender** will clear the amount entered to re-enter a new amount.

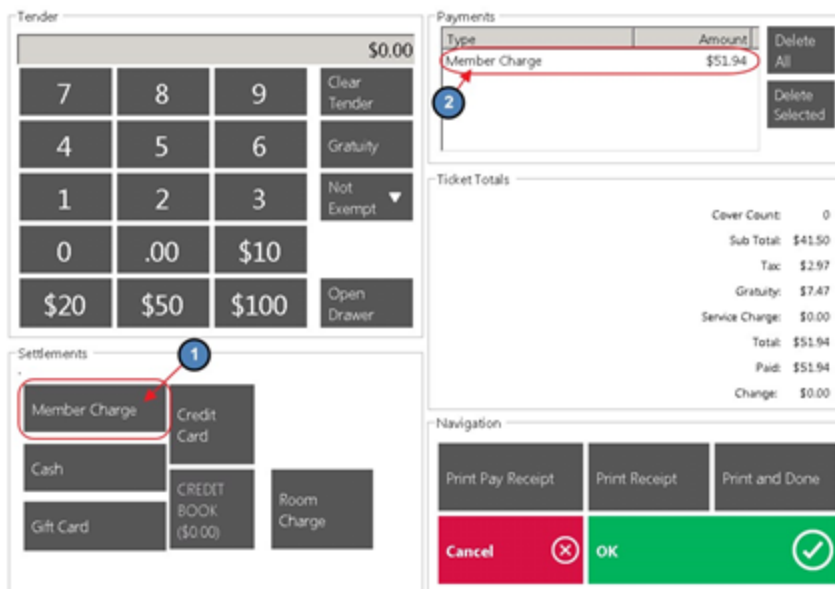


5) The pre-fixed values \$10, \$20, \$50, \$100 are applied to **Cash** settlement **ONLY**.

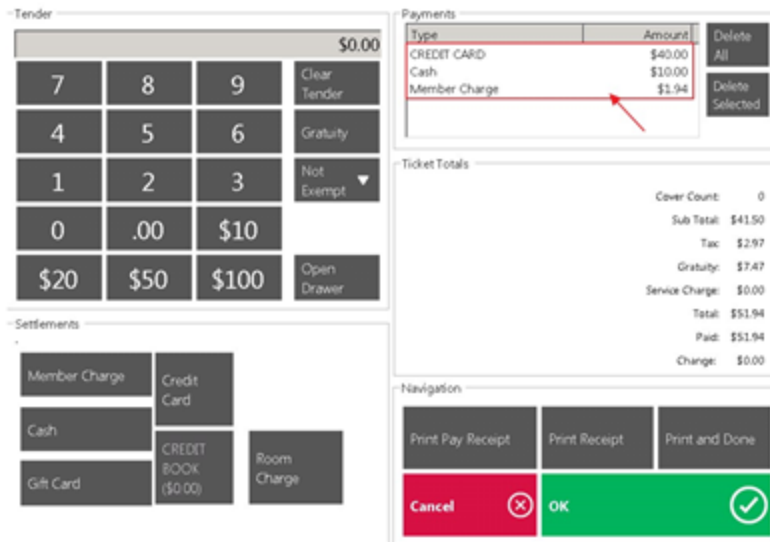
0	.00	\$10
\$20	\$50	\$100

**Settlements - Settle Ticket**

1) **Single Settlement Type Used** - If you want to settle the full amount to one settlement type **do not** enter the amount: simply select the Settlement Type and the full amount will be applied.



2) **Split Settlement** - Is used when the client wants to use more than one settlement type to pay the amount. For example 10 dollars to **Cash**, 40 dollars to **Credit Card**, and remaining amount to **Member Charge**. Enter the amount to be charged on the Cash settlement type in the Tender keypad and select the Cash settlement type, do the same for the Credit Card settlement type, and then select the Member Charge settlement type and the remaining amount on the ticket will be applied to Member Charge.



**Note:** The amount to split must be entered into the Tender keypad first before selecting the settlement type.



- **Delete All** - will remove all settlements entered to start over.
- **Delete Selected** - highlight the settlement type you want removed and select **Delete Selected**.



Payments	
Type	Amount
CREDIT CARD	\$26.94
Cash	\$15.00
Member Charge	\$10.00

Delete All

Delete Selected

### Exit

Will exit the POS screen back to the main screen.

In the POS ordering screen, select **Exit** when you want to leave the POS screen.



### Change Price

Gives users the ability to reduce the price without using a discount.



- 1) Highlight an Item and click **Change Price**.



- 2) Enter the price (use Percentages as applicable) and click **OK** when done.

Enter the new price for this item

\$0.00

7	8	9	Backspace	5%	10%	15%
4	5	6	OK 	18%	20%	25%
1	2	3		30%	40%	50%
0	Cancel 			%	Clear	

**Note:** The amount entered must be less than the item price. If you want to increase the price use the Upcharge button.

## Duplicate Ticket

Ability to create a duplicate ticket from another displayed ticket. This is useful if several members are to be charged the exact items.

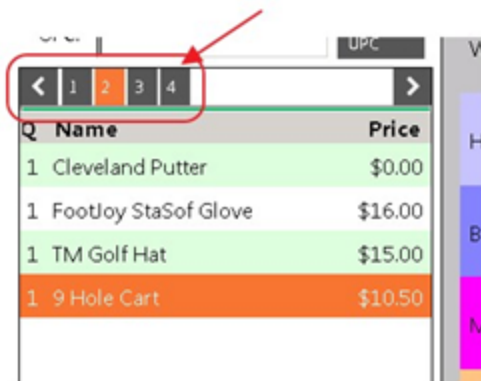
- 1) In POS ordering screen, select **Duplicate Ticket**.



- 2) Select how many duplicates you need.



- 3) The system will generate the number of additional tickets that you selected in the previous step.



**Note:** Use the **Change Member** feature to change the member attached to any of the duplicated tickets.

## Multi Select (Off)/(On)

Used in conjunction with Remove Item, Discount Item, and Comp Item; when (ON) users can select multiple Items.

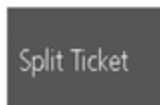
- 1) Click or touch **Multi-Select (Off)** and it will change to **Multi-Select (On)**.



- 2) Highlight all the items by touching or clicking the Item. Select one of the functions below and follow their respective instructions (These are the only functions that can be used in combination with Multi (On)).
  - a) [Remove Item](#)
  - b) [Discount Item](#)
  - c) [Comp Item](#)

## Split Ticket

Used if more than one ticket is required on a transaction and to edit separate tickets.



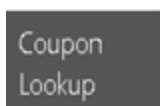
Please see our **Split Ticket manual** for a demonstration on all the ways to split an item or ticket.

## Coupon Lookup

The Coupon Lookup works in conjunction with Member Marketing and Item Price Scheduling.

Please see our **Coupons** manual for more information on their setup.

- 1) Place the order, and click on **Coupon Lookup**.



- 2) The screen will display all available coupons for redemption. Touch or click the one you want.



Name	Coupon Code
October Birthday	BIRTHDAY

**Note:**

- If the member does not have any active coupons the button will be grayed out.

If a coupon has been applied to an item and you wish to remove the discount, click or touch the **Remove Coupon** button.

### Print Ticket

Print Ticket is used when you want to print a receipt before closing a ticket. This will print out the **Pay Ticket** when selected. Most often used to acquire a signature prior to closing the ticket.

- 1) In POS ordering screen, select **Print Ticket** to print out the Pay Ticket.



- 2) Select **Exit** when finished.

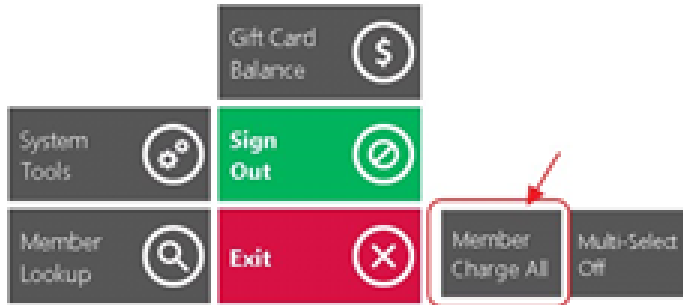
**Notes:**

- Use **Print Ticket** to give the customer information on the charges and to get a signature before closing the ticket.
- The **Pay Receipt** can be modified to display discounts, service charge, additional tip, and taxes in a few different formats.
- You also have the option to have messages, minimum balances, store credit balances, and other information included on the pay receipt.
- See [Print Preview](#) as an alternative to Printing directly.

## Other Button Functionality

### Member Charge All

Another feature is the **Member Charge All** button. This button will take all open tickets and close them to **Member Charge** without going through the payment screen.



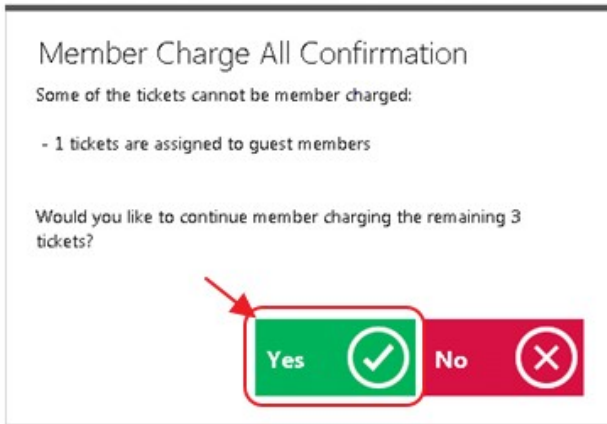
In this example, there are 4 open tickets (3 members and 1 guest).

Tickets	Labor	Specials	Contest	Messages	Events
<b>ID</b>	<b>Full Name</b>	<b>Area</b>	<b>Table</b>	<b>Ticket #</b>	<b>Server Name</b>
174C	Aguirre, Collette	Carlie's F&B Area	6 - 1	125486	Administrative User
749C	Ackerman, Ron	Carlie's F&B Area	7 - 1	125487	Administrative User
1000B	Abbott, Ben M.	Carlie's F&B Area	10 - 1	125488	Administrative User
001	Guest	Carlie's F&B Area	11 - 1	125490	Administrative User

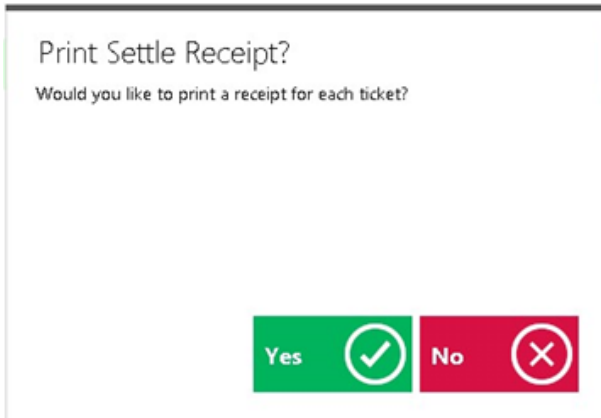
Click the **"Member Charge All,"** button.



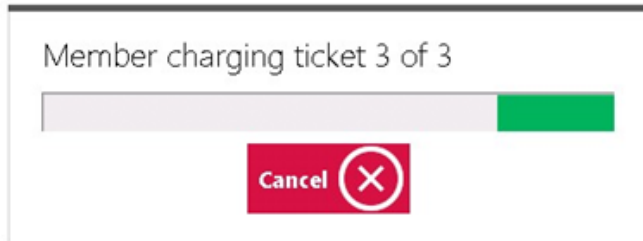
Upon clicking the button, a prompt will display telling the user that one ticket is assigned to guest members and cannot be member charged. The 3 remaining open tickets assigned to **members** however, will be settled to **Member Charge**. Select **Yes**.



Option will exist to Print a receipt.

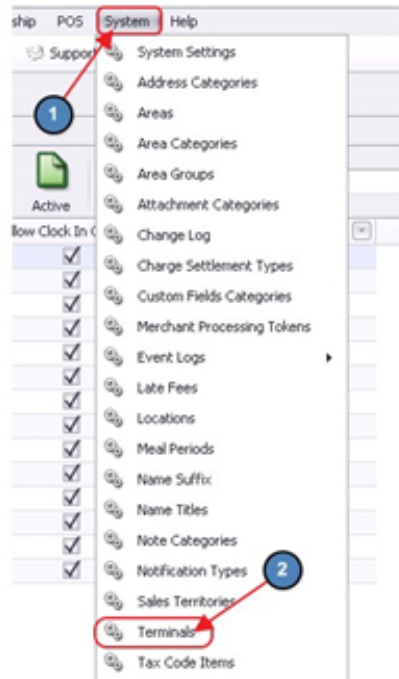


Member charge will commence.

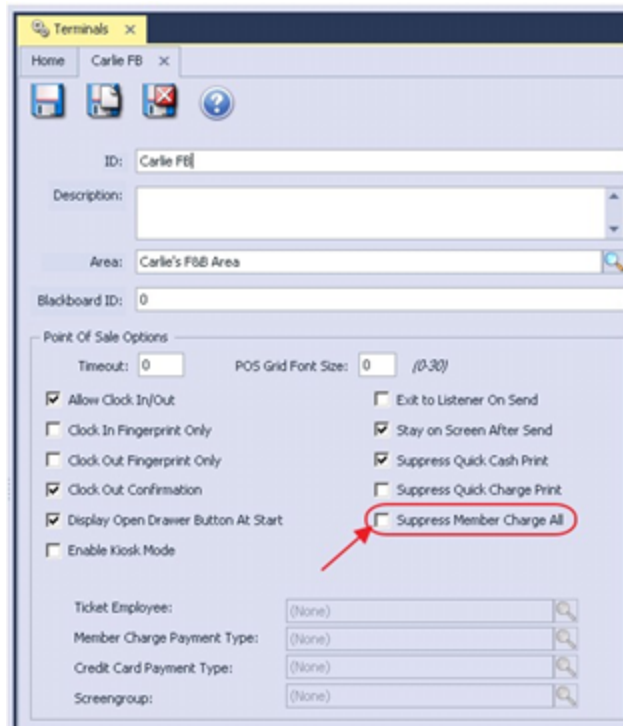


**Note:** Member Charge All can be turned off at the Terminal level if desired. To do so:

- 1) In CMA navigate to **System** across the top toolbar and select **Terminals**.



2) Double click the applicable Terminal and select **Suppress Member Charge All**.

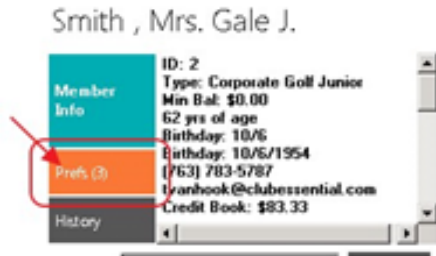


## Member Preferences

**Member Preferences** and other information about the member can be manually entered in POS. Food and Beverage uses this feature most often to input information such as

preferred tables, foods, drinks, allergies, etc. However, Retail Areas may use this feature to enter tee time preferences, shirt/shoe sizes, etc. If member preferences have been added, the button will turn **green** to alert the user there is information about the member. This information can also be printed to the receipt printer.

To view preferences, in the top left corner of the POS Screen, select **Prefs.**

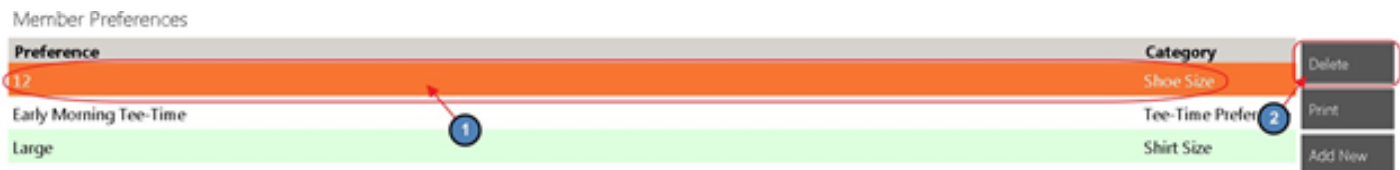


Member Preferences

Preference	Category	
12	Shoe Size	Delete
Early Morning Tee-Time	Tee-Time Preference	Print
Large	Shirt Size	Add New

### Delete a Preference

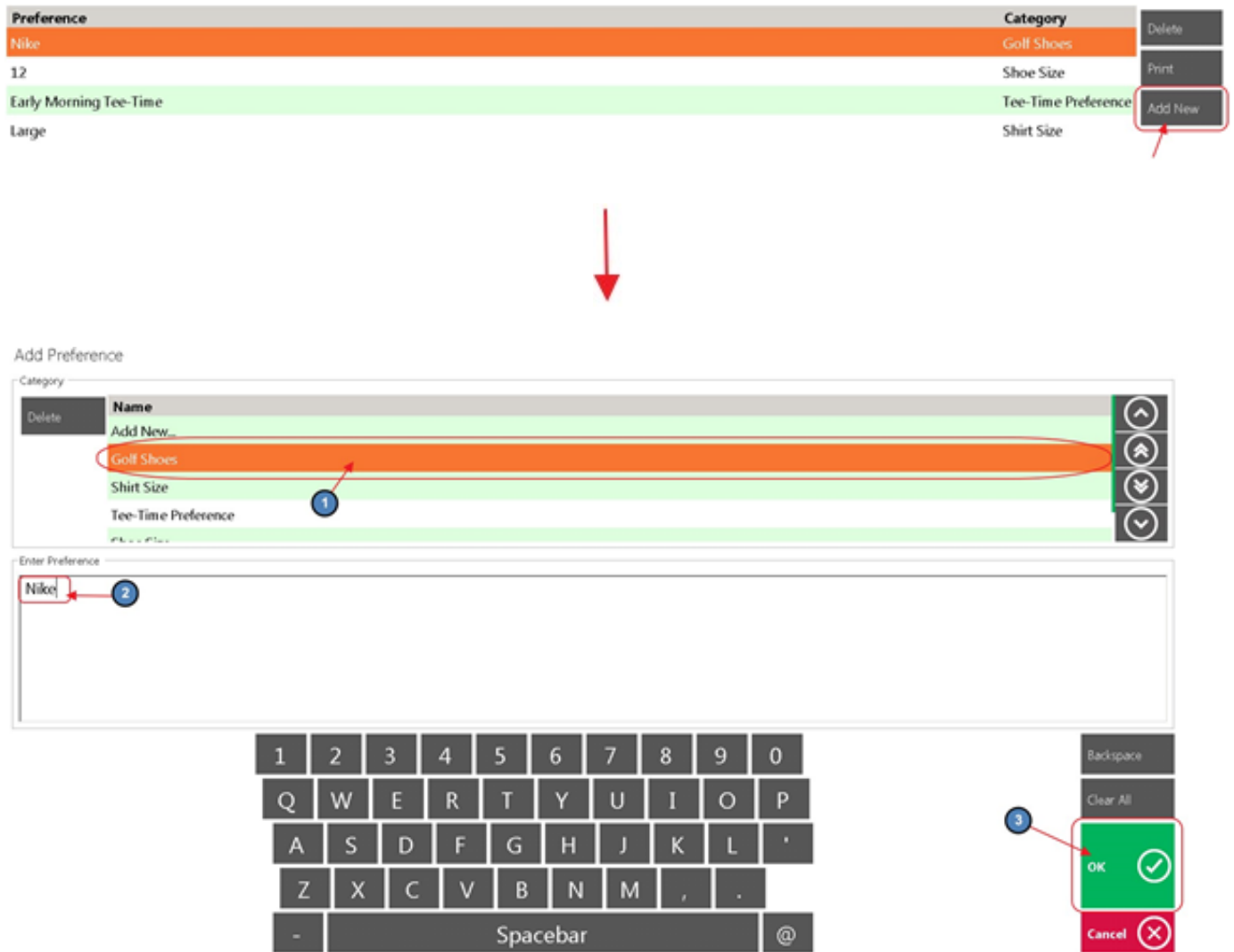
To delete a preference, highlight the Preference line, select **Delete**.



### Add New Preference

To add a new preference, select **Add New**, highlight the Category of preference, in the **Enter Preference** box enter the description of the new preference, select **OK**.





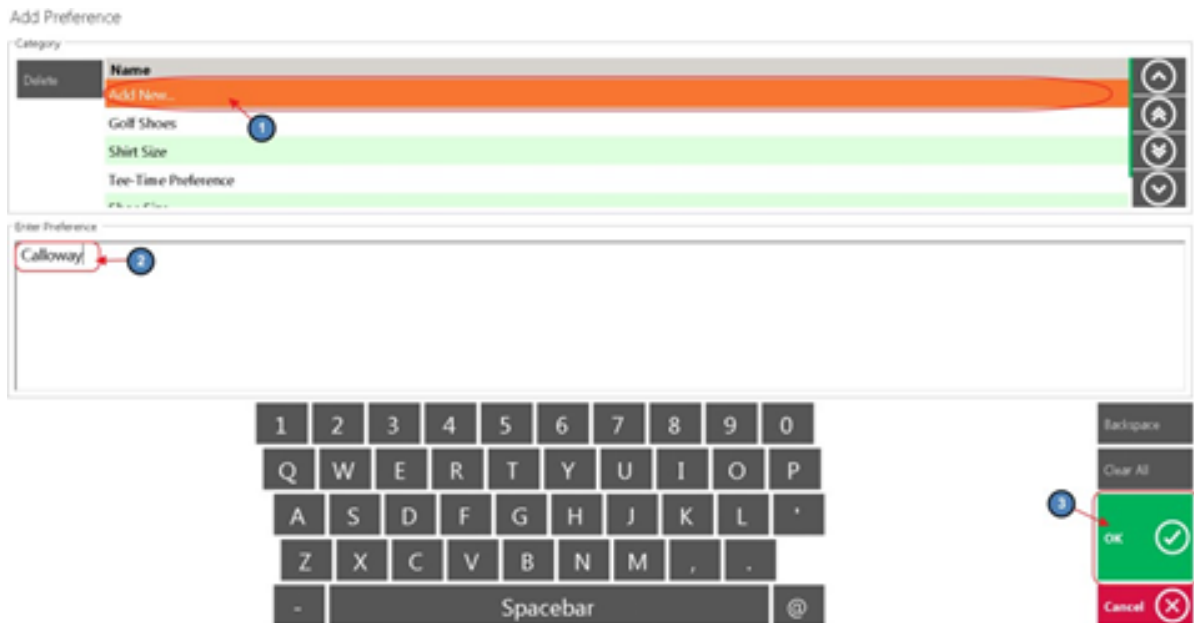
### Change Preference

To change a preference, the user must delete the preference that needs changed and add the new preference from scratch.

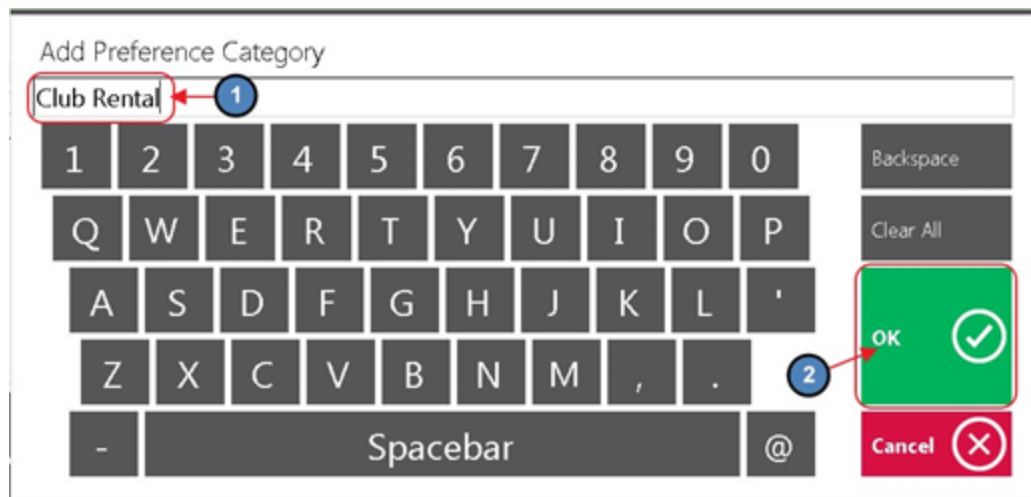
### Preference Categories

#### Add New Preference Category

- 1) To add a new Preference Category, in the **Select Category** box highlight the **Add New** line. Then, in the **Enter Preference** box enter the description of the new preference (**not the new category name**), Select **OK**.



- 2) The **Add Preference Category** box will appear, enter the new **Category** name, and select **OK** when finished.



## Member History

**Member History** will list the member's previously purchased Items.

To access Member History, select **History** in the top left corner of the POS Screen.

Smith , Mrs. Gale J.

**Member Info**  
 ID: 2  
 Type: Corporate Golf Junior  
 Min Bal: \$0.00  
 62 yrs of age  
 Birthday: 10/6  
 Birthday: 10/6/1954  
 (763) 783-5787  
 tyanhook@clubessential.com  
 Credit Book: \$83.33

**Prefs (5)**

**History**



Member History

From: 1/18/2014	To: 12/31/2014	Enable Multi-Select	Show Dependents	Area: Golf	Member: (2) Gale Smith	
Ticket	Date Sold	Sales Item	SKU	Sales Price	Sold By	View Ticket
125120	7/18/2016	Associate Round	100012493	\$1.07	Administrative User	View Ticket
124671	1/28/2016	Golf Events	301	\$21.45	Administrative User	View Ticket
124671	1/28/2016	Men's Die Hard Credit Offset	100012613	(\$21.45)	Administrative User	View Ticket
124670	1/28/2016	Men's Die Hard Voucher Package	100012612	\$150.15	Administrative User	View Ticket
124538	11/17/2015	Gift Cert Issued	391	\$50.00	Jim Gamble	View Ticket
124538	11/17/2015	ProV1xy Sleeve	100012562	\$19.28	Jim Gamble	View Ticket
124538	11/17/2015	Titleist Pro V 1 Sleeve	100011060	\$12.05	Jim Gamble	View Ticket
124354	11/7/2014	18 Hole Cart	100011030	\$22.52	Administrative User	View Ticket
124354	11/7/2014	18 Hole Cart	100011030	\$22.52	Administrative User	View Ticket
124354	11/7/2014	Family 18	100011036	\$48.26	Administrative User	View Ticket

1	2	3	4	5	6	7	8	9	0
Q	W	E	R	T	Y	U	I	O	P
A	S	D	F	G	H	J	K	L	'
Z	X	C	V	B	N	M	,	.	
-	Spacebar								@

Backspace

Clear All

OK

Cancel

**Notes:**

- In the **Search box** you can search the name of the item to narrow down the search.

Member History

From: 1/18/2014	To: 12/31/2014	Enable Multi-Select	Show Dependents	Area: Golf	Member: (2) Gale Smith	
Ticket	Date Sold	Sales Item	SKU	Sales Price	Sold By	View Ticket
124538	11/17/2015	Titleist Pro V 1 Sleeve	100011060	\$12.05	Jim Gamble	View Ticket

1	2	3	4	5	6	7	8	9	0
---	---	---	---	---	---	---	---	---	---

Backspace

- **From and To Dates** - enter the start and end date to narrow down the search.
- **Enable Multi Select** more than one ticket to print.
- **Show Dependents** - if selected, the system will display all family member tickets. If unselected, only the tickets rung under the member selected will show.
- **Area** name will be the name of the Area you have the ticket open.
  - The tickets listed will be tickets that were closed in that Area only.
  - To see tickets closed from a different Area, select the **Area** button, select the applicable Area.
  - It is important to remember that if you do not see an Area listed, then the member has **NO** closed tickets in that Area.
- **Member Name and Number** is displayed at top right corner; you can click on the name to search a different member. When you hit cancel it will take you back to the ordering screen and the original member will still be displayed.



- **View Ticket** - ticket detail can be viewed on the right middle of the screen; highlight the item to view ticket details and select **View Ticket**.
  - **Print Settle Receipt** and **Print Pay Receipt**; you can reprint a ticket from history at any time.

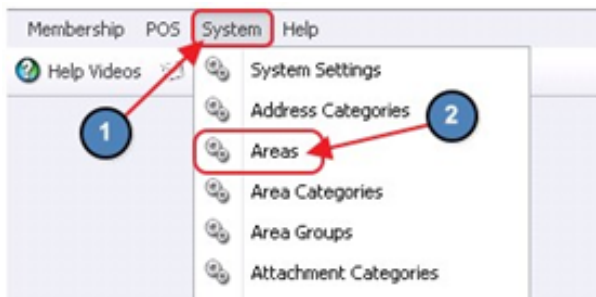


## Print Preview

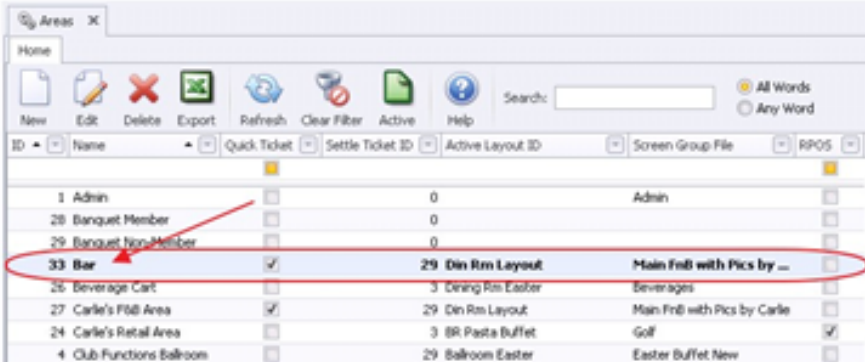
The **Print Preview** feature allows the user to see a Print Preview before any ticket is printed from the POS system. This **Print Preview** will display exactly how the ticket will look when printed and exactly what **Device/Printer** it will print to. Furthermore, the **Pay and Settle ticket Print Preview** will provide the user the option to email a copy of the ticket to the member as long as the member has a valid email address on file.

**Note:** This feature **must** be turned on for each **Area** the user would like the **Print Preview** displayed. To turn on this feature:

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

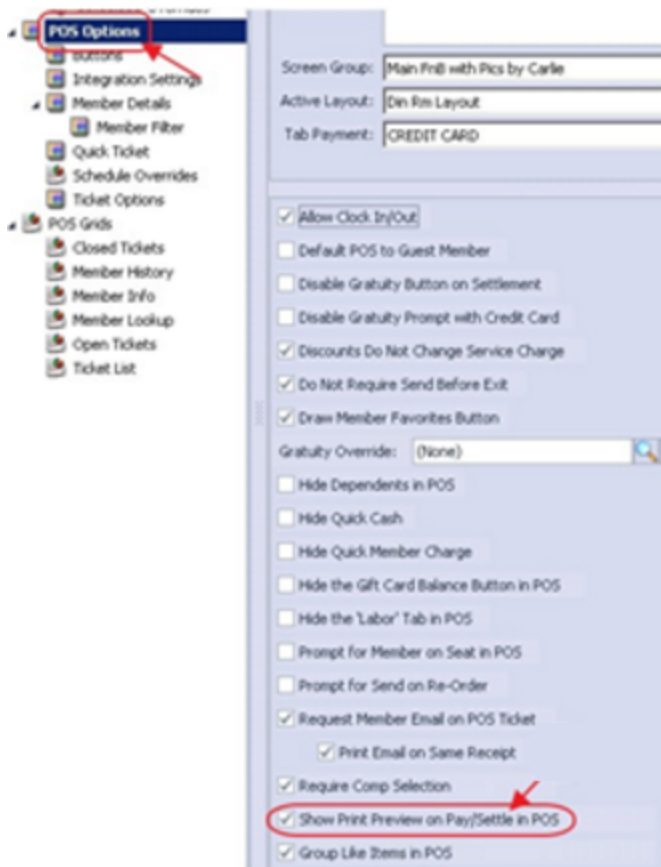


- 2) Select the applicable Area.



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 Fndb with Pics by ...	<input type="checkbox"/>
26	Beverage Cart	<input type="checkbox"/>	3	Dining Rm Easter	Beverages	<input type="checkbox"/>
27	Carle's Fndb Area	<input checked="" type="checkbox"/>	29	Din Rm Layout	Main Fndb with Pics by Carle	<input type="checkbox"/>
24	Carle's Retail Area	<input type="checkbox"/>	3	BR Pasta Buffet	Golf	<input checked="" type="checkbox"/>
4	Club Functions Ballroom	<input type="checkbox"/>	29	Ballroom Easter	Easter Buffet New	<input type="checkbox"/>

- 3) Navigate to the **POS Options** tab and select **Show Print Preview on Pay/Settle in POS** to get the Pay/Settle ticket preview, and **Show Print Preview on Send in POS** to get the Send ticket preview.



## Print Preview Examples

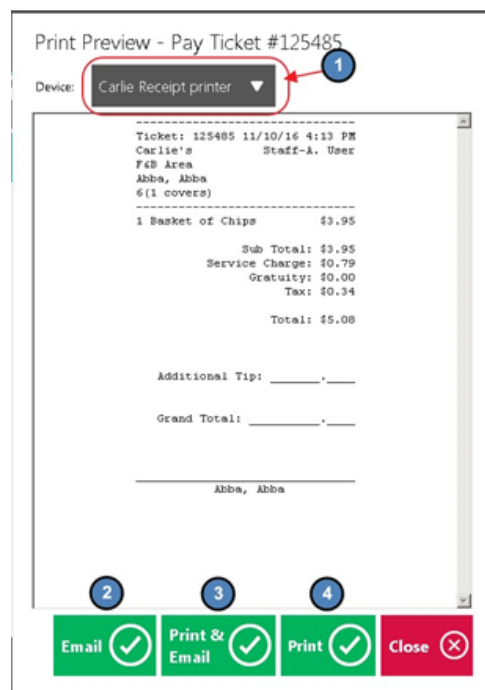
In this section we will provide a few examples of the Print Preview feature.

## Print Preview - Pay Ticket

- Select **Print Ticket** from the **Close Ticket** screen.



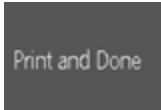
- The **Print Preview - Pay Ticket** prompt will display. Please see below for available options:
  - a) **Email** - Emails a copy of the ticket to the member. Member must have valid email address on file to function properly.
  - b) **Print & Email** - Prints the ticket and emails the member a copy of the ticket.
  - c) **Print** - Prints the ticket.



- Again, the **Print Preview** will display exactly what device the **Pay Ticket** will print - to and, exactly how it will look when printed.
- For **Pay** and **Settle** tickets the **Device** drop down will display only one printer. The printer displayed will depend on the **Receipt Printer** configuration of the specific **POS Device** the ticket is printed from (Please see our **POS Terminal/ Workstation Setup** manual for more information).

## Print Preview - Settle Ticket

- 1) Select **OK** or **Print & Done** when settling a ticket. The Print Preview- Settle Ticket prompt will display> same options as Print Preview- Pay Ticket are available.



- 2) The **Print Preview - Settle Ticket** prompt will display. Same options as **Print Preview - Pay Ticket** are available.

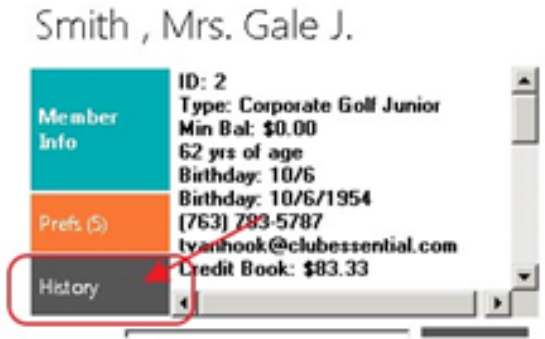


## Returning an Item

To return an Item,

- 1) Open a ticket for the member that is returning the item.
- 2) As explained in the previous section, you will click the **History** button in the Member Info area of the open ticket to access the Member's purchase history.





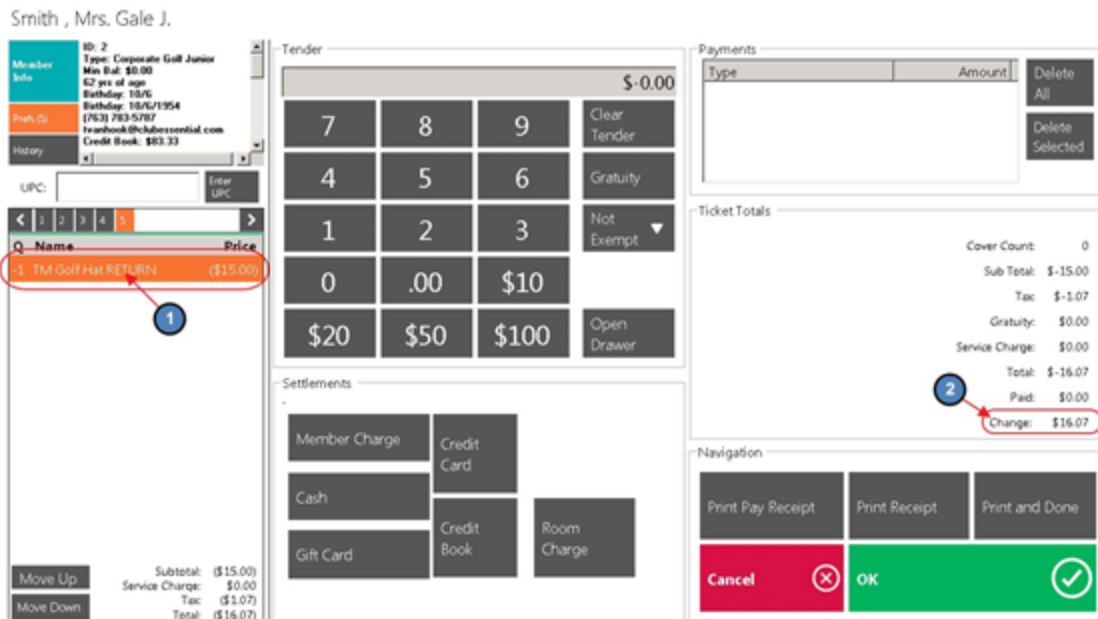
- 3) A screen with the Member's Purchase History will display. Search and select the Item being returned. In the example below, the customer is returning a TM Golf Hat purchased on 10/27/2016. Click **OK**.

Member History

From: 10/24/2016	To: 10/30/2016	Enable Multi-Select	Show Dependents	Area: Golf	Member: (2)Gale Smith	
Ticket	Date Sold	Sales Item	SKU	Sales Price	Sold By	ViewTicket
125437	10/27/2016	9 Hole Cart	100011032	\$11.26	Administrative User	View Ticket
125437	10/27/2016	Cleveland Putter	100011999	\$0.00	Administrative User	View Ticket
125437	10/27/2016	FootJoy StaSof Glove	100011118	\$17.14	Administrative User	View Ticket
125437	10/27/2016	TM Golf Hat	100012570	\$16.07	Administrative User	View Ticket

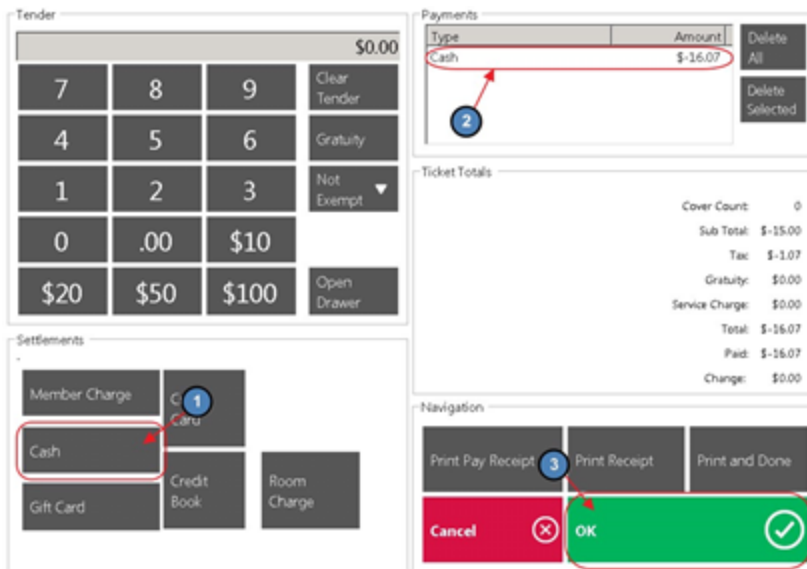


- 4) The system will generate a new ticket with the **credit** for the returned item and the user will close out the ticket as normal. The Close Out screen will display a **Change** amount instead of a Balance Due.

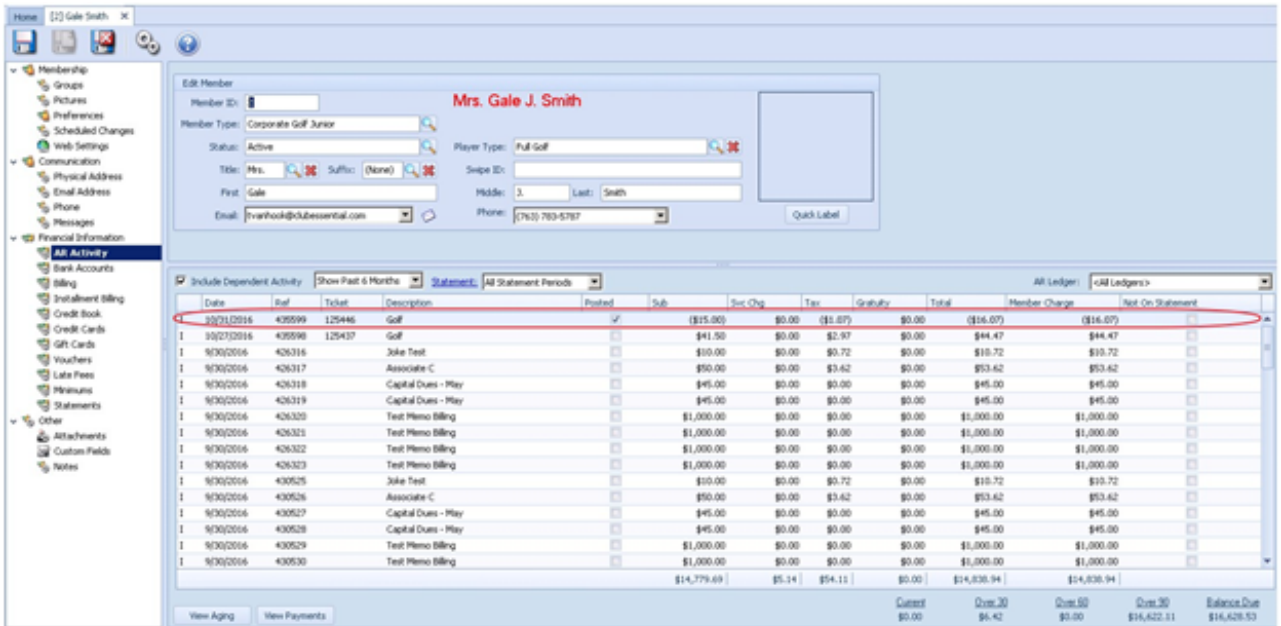


5) Issuing the refund can be done several ways depending on how the customer would like to be reimbursed.

**Cash Refund** – To issue a cash refund, the user would simply select the **Cash** settlement button and hit **OK/ Print and Done**.



**Credit the Member's Account** – To issue a credit to the member's account, the user would simply select the **Member Charge** settlement button and hit **OK/Print and Done**. In the image below you'll see that a credit in the amount of the returned item is issued to the Member's account.



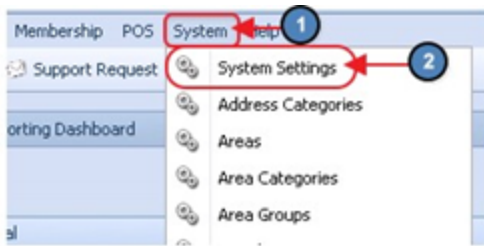
**Credit Book** – To issue store credit to the customer, the user would simply select the **Credit Book** settlement button and hit **OK / Print and Done**. In the image below you will see where credit book was issued to the customer in the amount of the returned item. The customer may apply this credit towards future purchases.



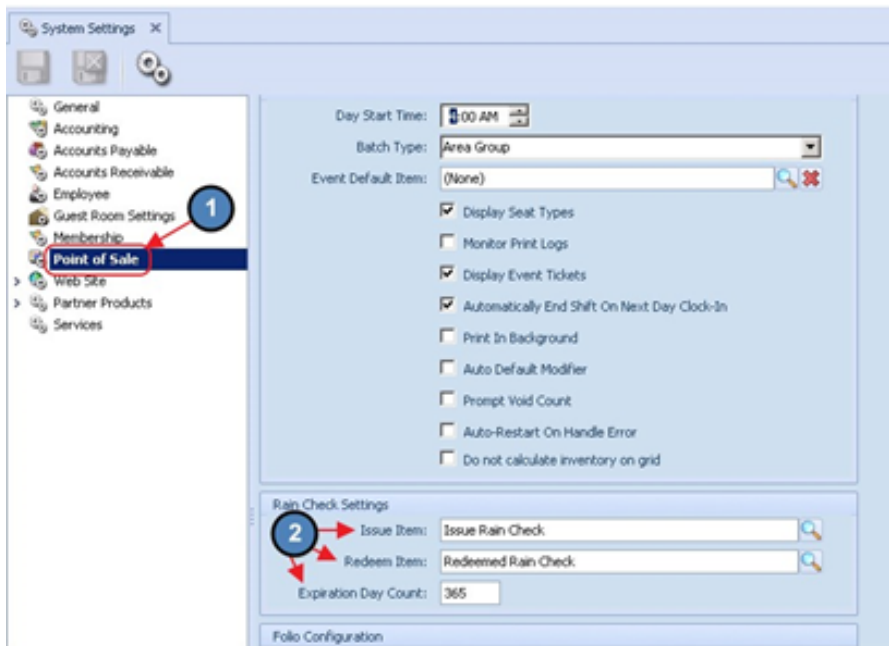
# Rain Checks

To utilize the rain check feature you must first create two Items; an Item to **Issue** a rain check and an Item to **Redeem** a rain check. These items are set up like any other Item in the **Manage Items** section of the Items Module. (See the [Clubessential Items Manual](#) for instructions on how to create an item) Then, you must select these items in the **Rain Check Settings** of **System Settings** and enter a **default expiration day count**.

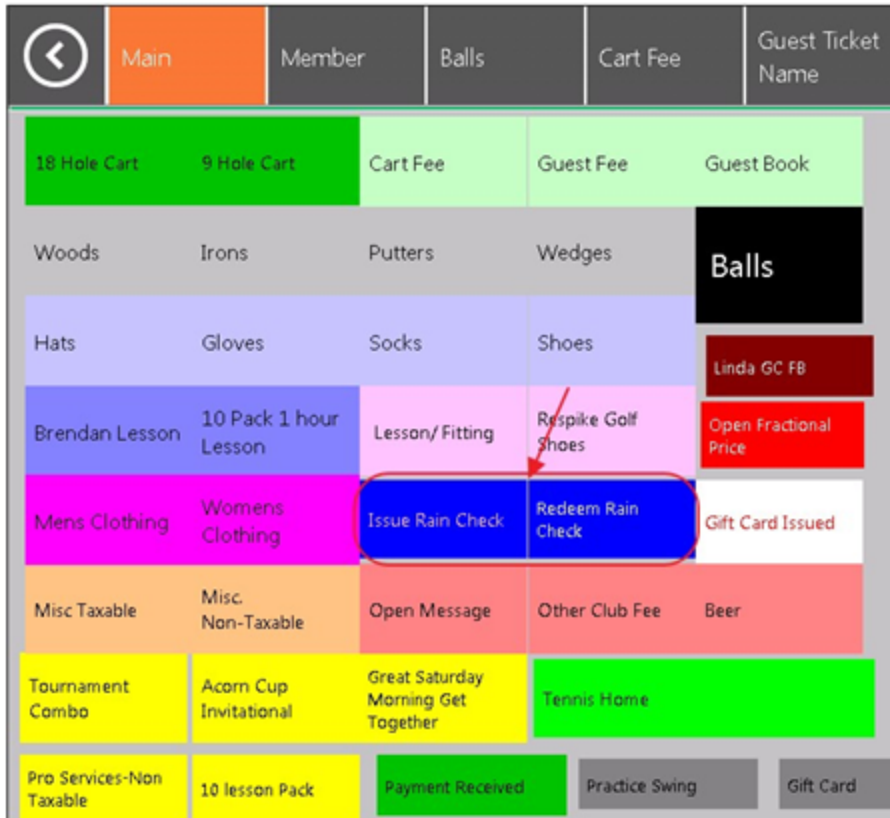
- 1) To access the **Rain Check Settings**, navigate to **System** across the top toolbar and select **System Settings**.



- 2) Select **Point of Sale** on the left pane and apply the **Issue** and **Redeem Item** under **Rain Check Settings**. Also enter a default expiration value in days in the **Expiration Day Count** field.



- Most clients place buttons on their POS home screen for the two rain check items. This is optional as you can use the [Lookup Item](#) Feature to look them up when necessary.



## Issuing a Rain Check

To issue a Rain Check,

- Open a ticket for the customer as you would normally, select the **Issue Rain Check button** (or look up the Issue Rain Check item using the [Lookup Item](#) feature), the **Issue Rain Check Window** will display as shown in the image below.

2) Fill out the details of the Rain Check Form.

- a) The **Golfer Count** will default to 4 but you will use the Up and Down arrows to select the number of Golfers.
- b) Enter the **Party Name**.
- c) **Enter the Expiration date** – The expiration date will default to the date as you determined in System Settings as the default number of days to expire. The expiration date may be overridden by simply using the Up and Down buttons to change the date.

3) Select whether the Rain Check is for **9** or **18 Holes** and if a **Cart** was used or not.



The form consists of two side-by-side boxes. The left box is titled "Round" and contains two radio button options: "9" (which is selected) and "18". The right box is titled "Cart" and contains two radio button options: "Yes" (which is selected) and "No".

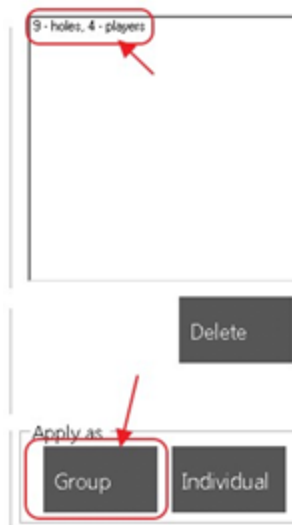
4) Select the number of Golfers the Rain Check is being issued for. (Notice that the system only allows a maximum selection of 4 because the Golfer Count in Step 2 is 4).



The form is titled "Selection" and displays a grid of radio button options for numbers 1 through 12. The number "4" is selected. Below the grid, there is a "More" option, a text input field containing the number "4", and two arrow buttons for navigation.

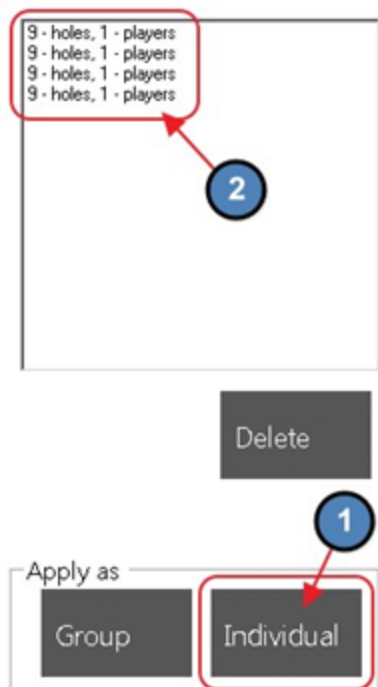
5) Select to apply the Rain Check as a **Group** or as **Individual** Rain Checks.

a) If **Group** is selected - The display window will appear as shown below. The user will have one, 9 Hole Rain Check for 4 players.



The screenshot shows a display window with a header "9 - holes, 4 - players" circled in red. Below the header is a large empty rectangular area. At the bottom of the window, there is a "Delete" button and an "Apply as" section. The "Apply as" section has two buttons: "Group" (circled in red) and "Individual".

b) If **Individual** is selected – the display window will appear as shown below. The user will have four, 9 Hole Rain Checks for 1 player.



- 6) Once the rain check details form is filled out, click **OK**.
- 7) A \$0 rain check item will display on the ticket and the user will close the ticket as normal.

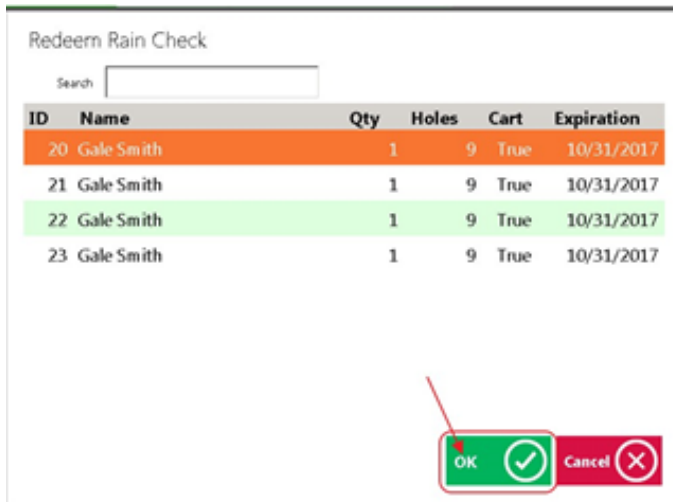




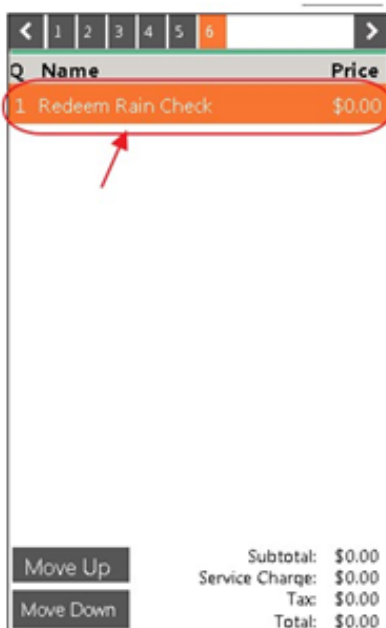
## Redeeming a Rain Check

To redeem a Rain Check,

- 1) The user will open a ticket for the customer as usual, click the **Redeem Rain Check** button (or look up the Redeem Rain Check Item using the [Lookup Item](#) feature). The Redeem Rain Check window will open and any rain checks that have been issued will display as shown below. **Select** the Rain Check being redeemed and then click **OK**.



- 2) A \$0 redeemed Rain Check Item will display on the ticket and the user will close the ticket as normal.



# Credit Book/Gift Cards

Credit Book and Gift Cards are explained in separate documents. Please see our **Credit Book** manual for more information on **Credit Book**, and please see our **Gift Cards** manual for more information on **Gift Cards**.

# Bulk Entry

Bulk Entry is used to quickly charge the same Items to more than one member. For example, a tournament entry fee, lessons, or clinics.

## Creating a Bulk Entry

To create a Bulk Entry Ticket,

- 1) Select **New Transaction** to open a new ticket as normal.



- 2) In the Member Lookup screen, rather than selecting a single member, you will select the **'Bulk Entry'** button (located in bottom right corner). Selecting this button will allow you to select multiple members. As you click on members they will list in a window in the top right. Once you have selected all members to be charged, click **OK**.



- 3) On the open ticket screen, notice that the ticket opens under the last member selected in the Member Lookup screen. Select the Item(s) to be charged to each of the selected members. Then, you have two options to close the tickets.



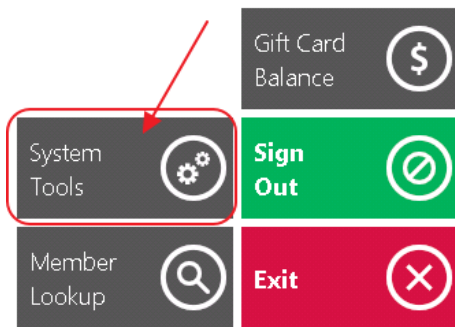
- a) **Quick Charge** - This option will quickly charge the accounts of the selected members for the items ordered all at once.

- b) **Create Tickets** - If you would like to open the tickets so that you may add additional items separately and close each ticket out individually, you will click Create Tickets. A ticket for each member selected will appear in the open tickets screen. Click to access the individual tickets and close each ticket as you wish.

ID	Full Name	Ticket #
2	Smith, Mrs. Gale J.	125451
541	Abba, Abba	125454
2	Smith, Mrs. Gale J.	125455
544	Adams, Andy	125456

## System Tools

Please see our **POS System Tools** manual for in-depth information regarding functionality contained within the System Tools button and associated tabs.



## Employee Time Keeping Actions

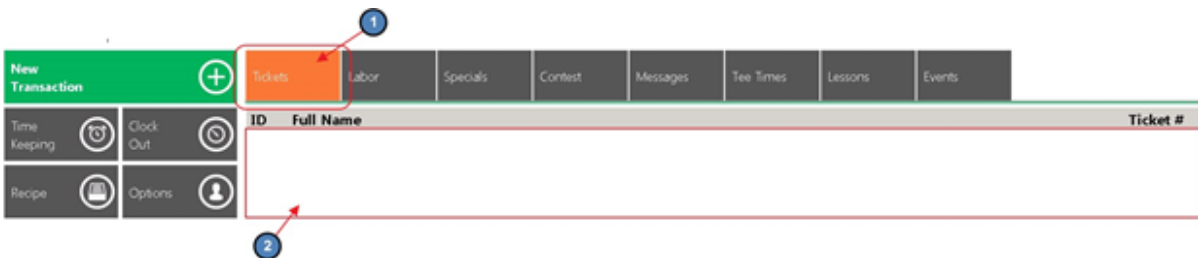
### Clocking-Out vs Ending a Shift

**Clocking- Out** and **Ending a Shift** have a few differences in the Office system. Clocking-Out simply stops the system from recording time on the employee's timesheet. When an employee ends their shift, the system is prompted to stop recording sales under the employee, until the employee clocks back in. It is important to remember that an

employee cannot end their shift without clocking out as well. When an employee clocks back in for the first time after their last End of Shift, this is when the employee’s next “Shift” begins. During this time, employees have the ability to Clock-out without ending their shift at any time. This is mostly used to allow employees to clock-out for breaks, lunches, etc. without ending their shift. This keeps reporting and timekeeping clean as the End of Shift Report will display all sales and transactions completed during the employee’s “Shift” regardless of how many times they clocked out during their shift. Furthermore, an employee’s timesheet will reflect all instances of when an employee clocked in and out during their shift.

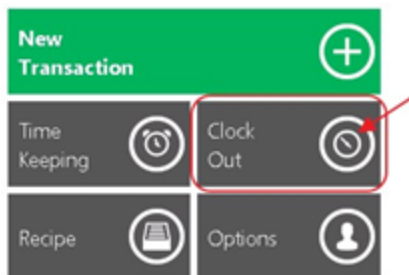
## Clocking-Out for Breaks

As previously mentioned, employees have the ability to clock-out for breaks without ending their shift. However, before an employee can clock-out the **Tickets** screen must be blank reflecting that the employee has no open tickets.

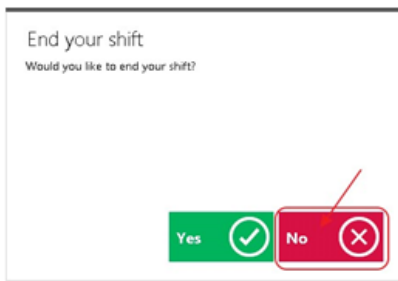


Employees have 2 options when clocking out for breaks.

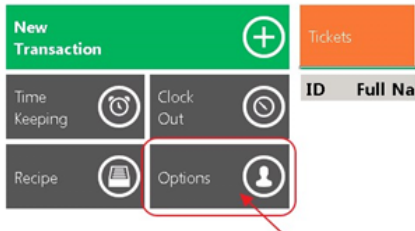
- 1) Select **Clock Out** on the main POS screen.



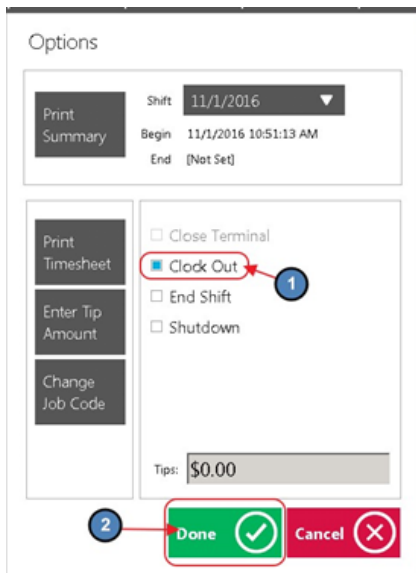
The system will prompt, **Would you like to end your shift?** Select **No**.



2) Select **Options** on the main POS screen.



Select **Clock Out** and hit **Done**.



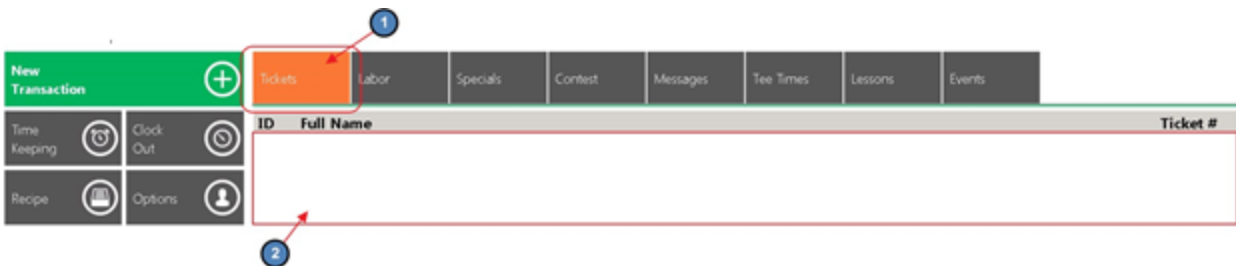
**Notes:**

- Again, either of these options will clock the user out but **NOT** end their shift. Meaning that the employee can clock back in and continue working on the same shift.
- When clocking back in after a break it is important to remember to clock-in under the **SAME** Job Code that started the Shift. For instance, if I began my shift under the Food & Beverage Management Job Code and I clocked out for lunch, when I clock back in I need to select the Food & Beverage Job Code again for timekeeping to report properly.



## End of Shift Processes

Before an employee ends their shift, the **Tickets** screen must be blank reflecting that the employee has no open tickets. Close all tickets before proceeding.

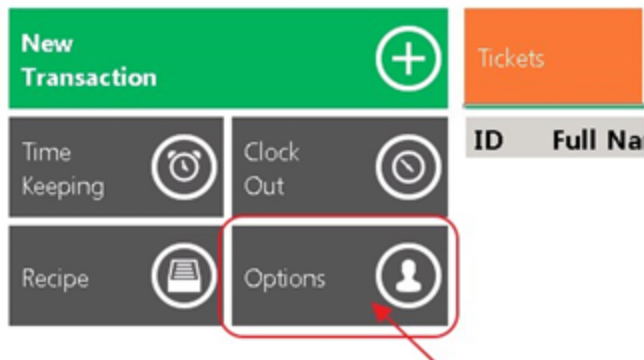


## End of Shift Report

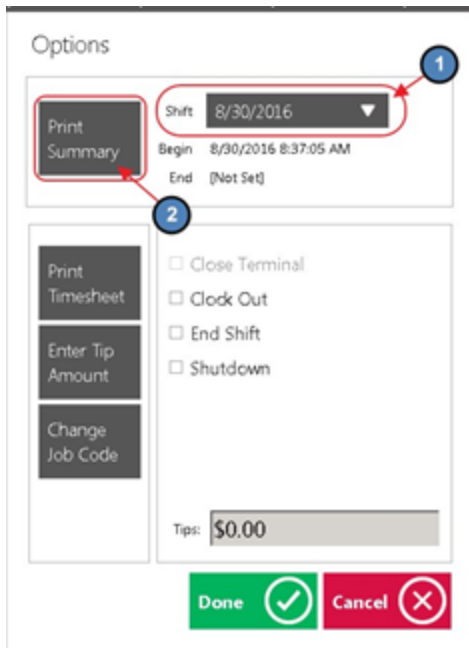
Once the **Tickets** display is blank reflecting no open tickets, an **End of Shift Report** can be printed. This report can be printed as many times as the user wants at any time. In addition, the system also keeps an archive of past End of Shift reports for the user to access and print at any time.

To print an End of Shift Report,

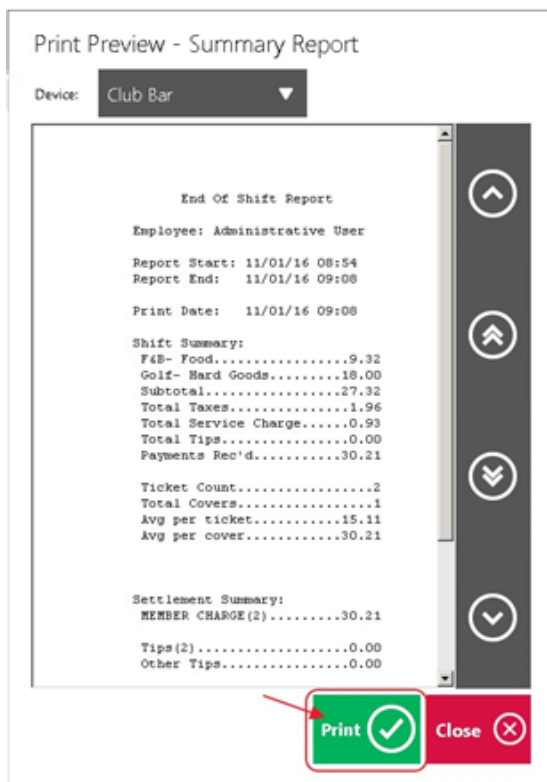
- 1) Select **Options** on the main POS screen.



- 2) Verify that the most current **Shift** is reflected (The system will default to the latest Shift) and select **Print Summary**.

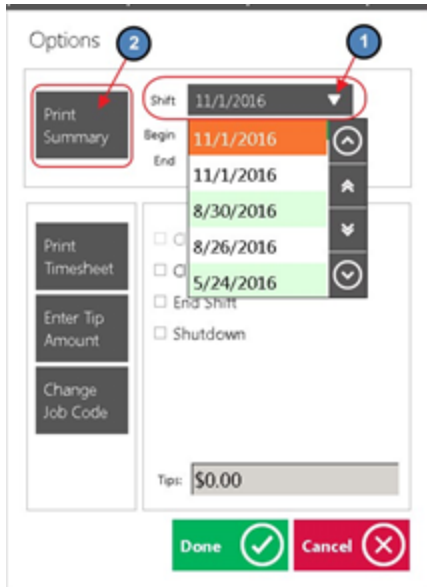


- 3) A **Print Preview** will display showing how the report will look when printed, and the Ticket Device the report will print too. Select **Print** to continue printing.





- As previously mentioned, the system keeps an archive of past End of Shift reports for the user to access and print at any time. To print a past End of Shift Report simply select the appropriate shift in the **Shift** drop down and select **Print Summary**.

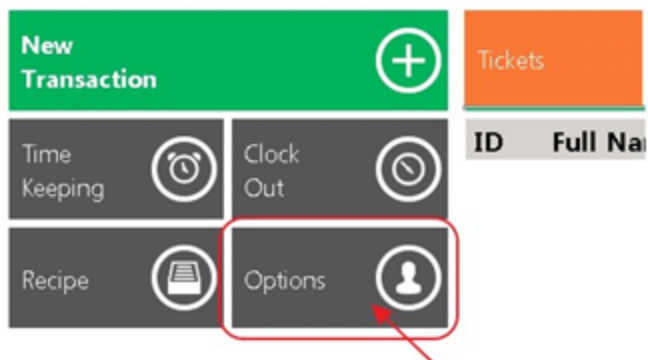


## Ending the Shift

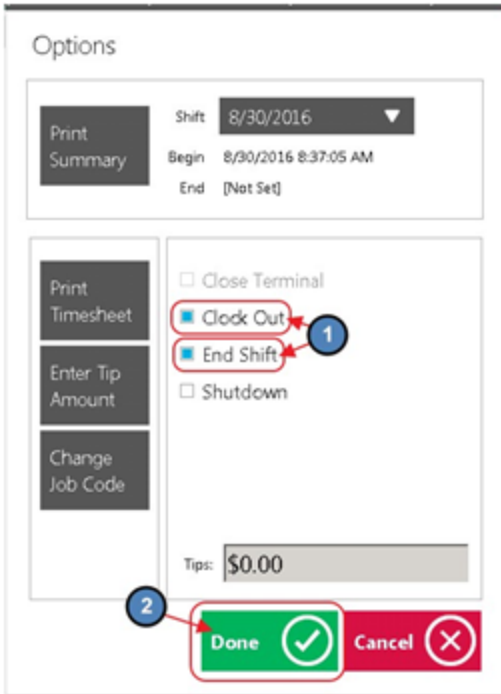
Different operations have different end of shift expectations before an employee can leave; follow the policies and procedures as advised by the club. The Office System requires all tickets to be closed and an **End Shift** completed. This is the preferred method to ending a shift. Again, please note that an employee cannot end their shift without clocking-out as well.

To end a shift,

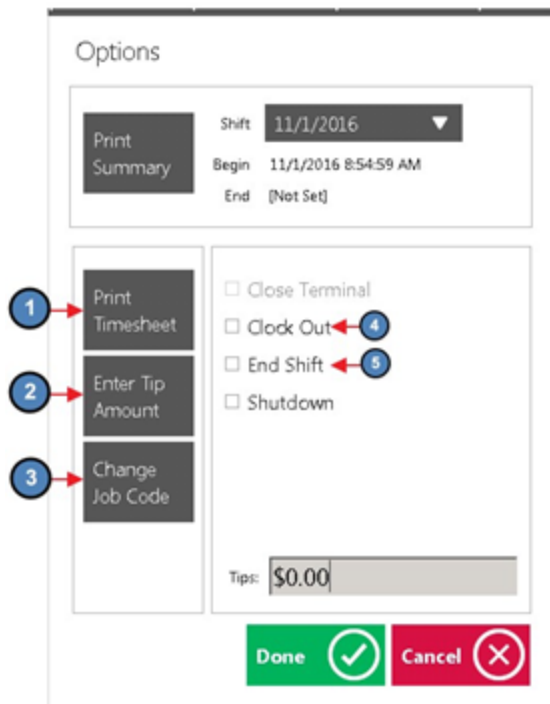
- Select **Options** on the main POS screen.



- 2) Select the **End Shift** box (**Clock Out** will automatically select itself when **End Shift** is selected). Select **Done**.



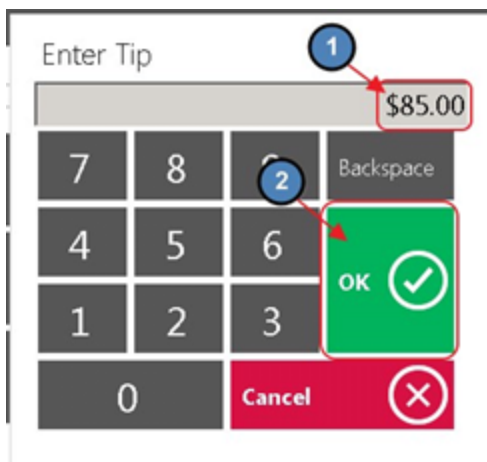
## Options



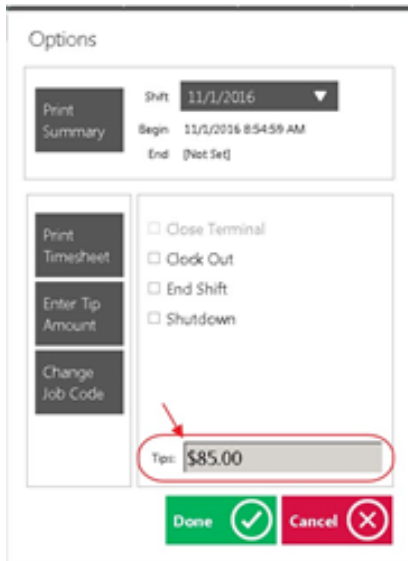
- 1) **Print Timesheet** - when selected, the system will provide a report on total hours worked during the shift per Job Code. A **Print Preview** will also display when this option is selected. Select **Print** to continue printing the report.



- 2) **Enter Tip Amount** - if you report cash tips for tax purposes, select this option and a prompt will display for the user to enter their cash tips. Click **OK** when finished.



The tip amount will then display on the main Options screen.



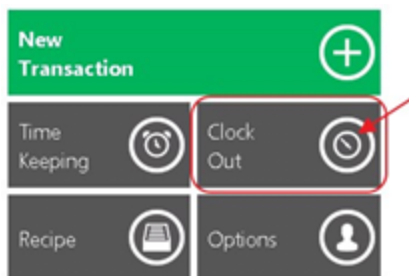
- 3) **Change Job Code**- if you mistakenly logged into the wrong Job Code, select this option and a prompt will display asking the user to select the correct Job Code.



- 4) **Clock Out** - explained in the [Clocking-Out for Breaks](#) section of this document.
- 5) **End Shift** - this is the last step needed before the shift is considered ended. As previously mentioned, **Clock Out** will automatically select itself when **End Shift** is selected.

### Other Ways to End a Shift

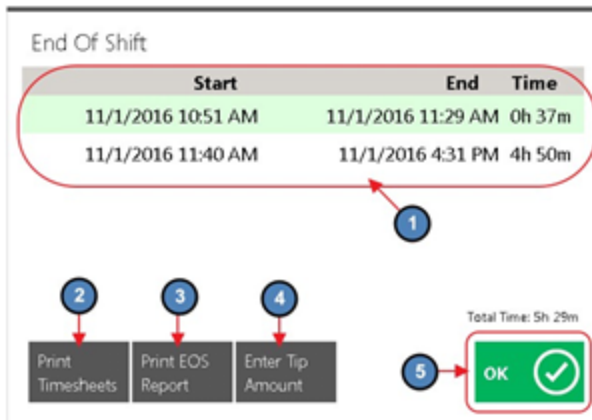
- 1) Select **Clock-Out** on the main POS screen.



2) The system will prompt, **Would you like to end your shift?** Select **Yes**.



3) **End of Shift Options** will populate.



- a) All instances of clocking in and out during the shift will display.
- b) **Print Timesheets**
- c) **Print End of Shift Report**
- d) **Enter Tip Amount.**

4) Select **OK** when finished.

## Best Practices

When setting up your POS, ensure the screen settings and options 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.

Ensure your staff is familiar with 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 that impact 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.