

11.21.16 Releases

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Enhancements

Club Intelligence - All Dashboards

- Updated all Dashboards to use the new grid and chart control User Interfaces.
- Use Case: Improved UX when viewing/utilizing Dashboards.

The screenshot displays the Club Intelligence software interface with several dashboards and a chart. A red box highlights the 'Club Intelligence Dashboard' in the left sidebar and the 'Consolidated Rolling Net Profit/Loss Comparison' chart in the main area.

Income Statement Summary: November 2016

Category	Current	Prior
Income	(\$623)	(\$2,944,429)
Cost of Goods	(\$47)	(\$7)
Expense	(\$10,400)	\$16,553

Current: (\$11,069.53) Prior: (\$2,927,882.71)

General Ledger Activity: This Month

Account	Debit	Credit
[100] Premier Bank Operating	\$263.86	\$500.00
[101] Premier Bank Payroll	\$0.00	\$10.00
[120] Accounts Receivable	\$850.28	\$8.00
[134] Inventory - Wine	\$38.00	\$38.00
[135] Inventory - Golf	\$188.00	\$44.00
[143] Tennis Inventory	\$5.06	\$2.53
[200] Accounts Payable	\$300.00	\$100.00
[204] AP GOLF	\$700.00	\$200.00
[207] Accrued Salaries	\$10,000.00	\$0.00
[226] Gratuity	\$0.00	\$0.90
[233] State Sales Tax	\$0.00	\$26.38
[240] Golf Shop Misc.	\$20.00	\$4.00
[243] Golf Pro Merch (Taxable)	\$0.40	\$4.00
[250] Sales Tax Accrual - Golf Shop	\$0.00	\$0.26
[287] Golf Gift Certificates	\$0.00	\$350.00
[440] Tennis Income	\$0.00	\$364.00
[460] Other Club \$2 Charges	\$100.00	\$100.00
[497] Clearing Account	\$270.14	\$520.14
[498] Fred Food Sales	\$0.00	\$9.00
[622] Wages Bussers	\$0.00	\$10,000.00
[750] Miscellaneous Expense	\$0.00	\$500.00

Total Debit: \$12,882.27 Credit: \$12,882.27

Consolidated Rolling Net Profit/Loss Comparison: January 2016

Bar chart showing monthly net profit/loss from Jan to Dec. The Y-axis ranges from (\$300,000.00) to \$3,000,000.00. The chart shows a significant spike in November. Legend: Show Net Change (blue), Last Year (red), This Year (blue).

Cash Receipt Deposit Summary: November 2016

Batch Number	Transaction Date	Amount
CR02089	11/03/2016	\$4,059.04
CR02090	11/11/2016	\$600.00
CR02091	11/17/2016	\$300.00
CR02093	11/17/2016	\$10.00
CR02094	11/18/2016	\$18,279.19
CR02095	11/18/2016	\$18,279.19

Total: \$41,527.42

Balance Sheet Summary: November 2016

Ledger Category	Current	Prior
Income	\$966	\$966
Assets	\$15,049,438	\$14,248,198
Liabilities	\$4,689,029	\$4,656,884
Equity	\$1,206,218	\$4,123,029

General - User Interface Controls

- Updated all legacy checkboxes, labels, combo boxes, color pickers and date pickers to use the new standard User Interface controls.

Use Case: Improved UX utilizing Interface controls.

Manage Members x Approve Payment Batches Approve Payment Batches Approve Vendor Invoice Batches Groups Manage Items Edit Area Layout

Home [45] Tristan Schrader x

Membership

- Groups
- Pictures
- Preferences
- Scheduled Changes
- Web Settings
- Communication
 - Physical Address
 - Email Address
 - Phone
 - Messages
- Financial Information
 - AR Activity
 - Bank Accounts
 - Billing
 - Installment Billing
 - Credit Book
 - Credit Cards
 - Gift Cards
 - Vouchers
 - Late Fees
 - Minimums
 - Statements
- Other
 - Attachments
 - Custom Fields
 - Notes

Edit Member

Member ID: 45 **Dr. Tristan Schrader**

Member Type: Corporate Golf Junior

Status: Active Player Type: (None)

Title: Dr. Suffix: (None) Swipe ID: []

First: [] Middle: [] Last: []

Email: [] Phone: [] Quick Label

Names

Alt Name: []

Family Title: []

Proper Title: []

Statement Name: []

Regular Title: []

Dates

Approval Date: []

BirthDate: 3/13/1946 Age: 70

Join Date: 4/30/1986 [] \$0.00

Wedding: []

Renew Date: []

Resignation Date: []

Miscellaneous

Gender: Male

Profession: []

Member URL 1: []

PIN: []

Spouse

Spouse First Name: []

Spouse Member: []

Dependents

ID	First Name	Member Type	A	Bi
45A	[]	Sp-Corporate G	0	

Manage Members x Approve Payment Batches Approve Payment Batches Approve Vendor Invoice Batches Groups Manage Items x

Home New x

Item Setup

- Inventory
- Labels
- Pictures
- Point Of Sale
 - Button Style
 - Print Configuration
 - Modifiers
 - Recipe
 - Voucher

Name: [] Ask For Price Active FrB Item

Description: [] Ask For Name Dont Display at POS Retail Item

Retail Price: \$0.00 Ask For Quantity Round Of Golf Billing Item

Member Price: \$0.00 Credit Book Eligible Suppress on Statement Detail Ask For Guest

Item Category: Wine Dinner Bottles Inventoried Item Tax Inclusive

Qty On Hand: 0 Track Countdown Daily Special Allow Fractional Quantity Price

Average Cost: \$0.00 Auto Increment Seat Auto Increment Cover Disable ability to discount

Sales Account: (None) [] []

Comp Account: (None) [] []

Discount Account: (None) [] []

Rewards Account: (None) [] []

Asset Account: (None) [] []

Asset Adjustment Account: (None) [] []

COGS Account: (None) [] []

COGS Adjustment Account: (None) [] []

Point of Sale (POS)

Interfaces

- **Added support for a new settlement integration using B4Checkin to close a POS ticket to an Oracle/Micro folio.**

Use Case: This behind the scenes functionality allows clients to further integrate their online reservations with Clubessential POS, and Oracle/Micro.

Credit Card Processor - Shift 4

- **Added support for Shift4 Credit Card processing in POS for both Retail and F&B modes.**

Use Case: This enhancement allows Clients to now utilize Shift 4 as their credit card processor.

Bug Fixes

- Fixed an issue where club users were seeing duplicate zero balance expired credit books in a member profile.
- Fixed an issue where multi-select was not working when scrolling on the tee time tab.
- Fixed an issue where the Quick Add button was not working properly in the Print Statement Wizard when selecting a Marketing Template.
- Fixed an issue when entering date values in the the invoice date control that was requiring mouse usage.
- Fixed an issue where Purchase Orders were being improperly flagged as complete when a user would delete a line from the PO in the Item Receipt grid.
- Fixed an issue where a reciprocal member charge was not reflecting the quantity entered on the AP invoice.
- Fixed an issue where a proxy member from the Tee Sheet was getting a blank ticket generated when using the Member Charge All button.
- Fixed an issue with the Guest Room occupancy report that was including deleted rooms.
- Fixed an issue with the inventory transaction history report that was including inventory adjustments for the day after the end date.