F&B Areas

2019 - Summer Edition

User Guide - Table of Contents

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 an F&B Area.

Important: It is **NOT** recommended to create a new Area without first contacting Clubessential Support.
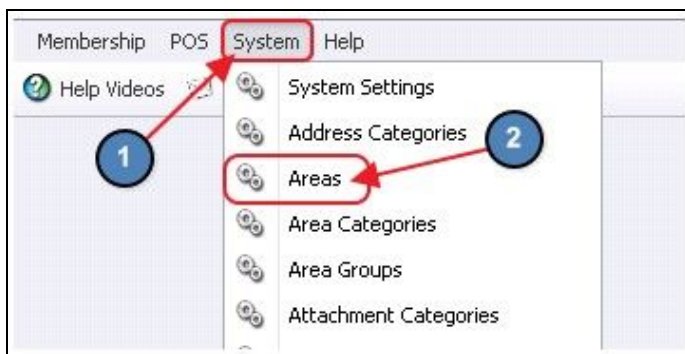
Use Case(s)

The main Dining Room at a Club has a new Manager, and slight changes to the original configuration of the Dining Room area will need to be configured. The Dining Room will be moving to a Buffet-only option on the weekends, and therefore will need to adjust the Scheduled Overrides. Additionally, they will be tweaking a few other options, including allowing the Servers to view the Tee Sheet in the Dining Room, and requiring Servers to now enter Comp reasons when comping an item within the area.

Accessing the Tool

To access Areas,

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

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

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.

F&B Areas- Tab Overview

In this section we will review the various tabs within an F&B Area.

Area Setup

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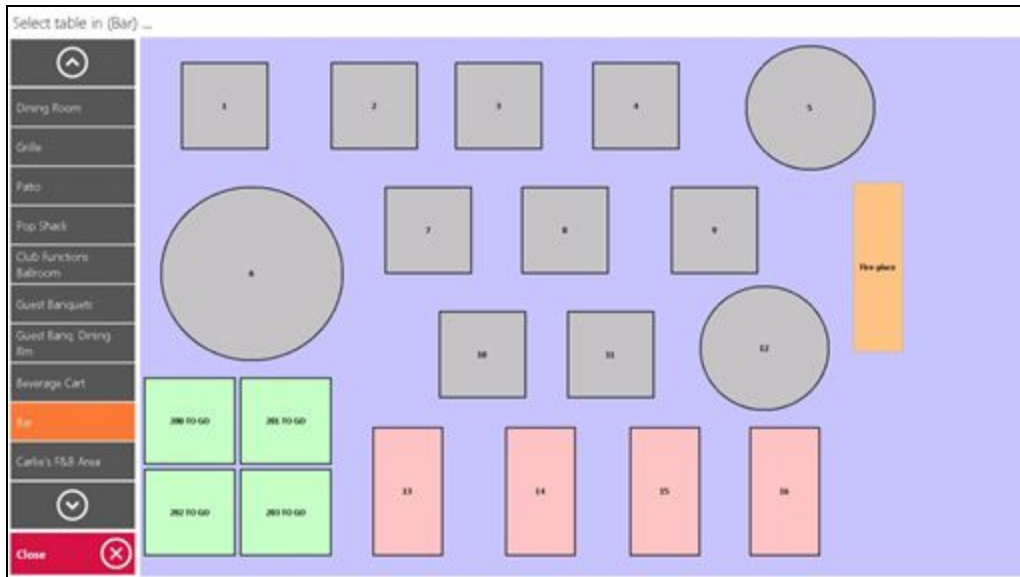2. **Description** - Enter an optional **Description** of the Area.
3. **Screen Group** - Select the **Screen Group**/ **Menu** to be displayed at POS for the Area.

4. **Active Layout** - Select the **Area Layout** to be displayed at the POS for the Area (Select a Table Phase).

5. **Tab Payment** - Set this field to the **F&B Credit Card** Charge Settlement Type. This allows the user to hold a guest's credit card information on the **Tab** key in POS.
6. **POS Type** - For F&B Areas set this field to **FnB**.
7. **Department** - Select the **Department** to be associate with this Area (Required).
8. **Area Category** - Select the **Area Category** to be associated with this Area (Required).
9. **Manager** - Select the **Manager** of this Area using the lookup (Optional).

10. **Display Order** - Select the Display Order this Area should appear in the Select a Table phase at POS.

    Note: For the Display Order to work correctly, each F&B Area must have a sequential Display Order. Otherwise, the Display Order will be alphabetized.
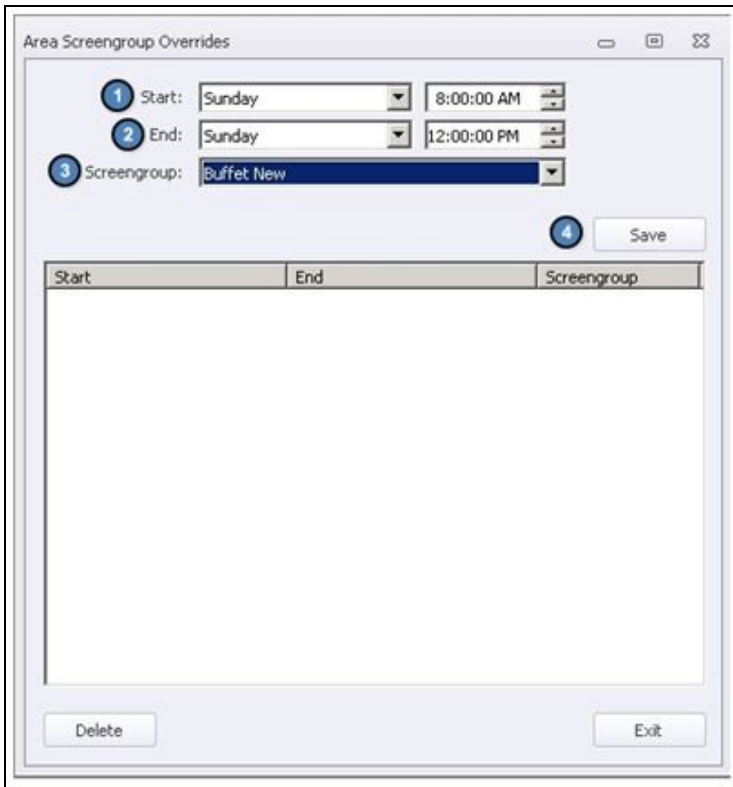
11. **Schedule Overrides** - This allows the user to override the Screen Group (Menu) that shows in the POS, during a certain time frame for this Area.

    For instance, assume the club has a breakfast buffet on Sunday from 8:00am- 12:00pm and they only want the Buffet Screen Group to show during this time frame.

    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**.

POS Options

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.
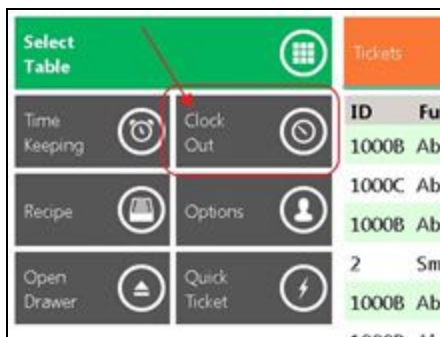
2. **Require a Send Before Printing Receipt** - If checked, the user is required to send all items before a receipt can be printed.
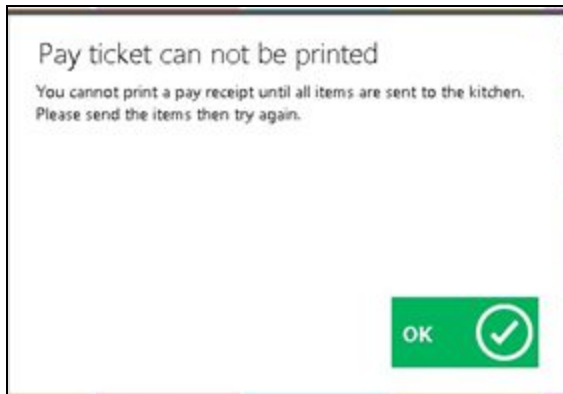
Please Note: This setting will only apply when printing the Pay Ticket.

3. **Show Tee-Time as Read Only at POS** - Only applicable to Axis clients in F&B areas, if checked, the POS will display a read only mode of the Tee-Sheet in POS.

4. **Allow Clock Out with Open Tickets** - If checked, this setting allows Servers to Clock Out with open tickets but not end shift.
5. **Require Comp Selection** - If checked, the user is required to select a Comp reason when Comp Item is selected at the POS.
6. **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).

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

a. **Use Coursing** - If the kitchen uses Coursing, check this box.

b. **Use Firing** - If checked, the user will be able to send different courses to the kitchen separately.

c. **Use Seat Type** - If checked, Users are presented with the option to label Items as being Female or Child as a courtesy to the Member.

d. **Use Seating in Mobile POS** - If checked, this setting will prompt Users to select the appropriate seat in the Mobile POS for the Item being added.

7. **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.

8. **Require PIN and Swipe Card for Login** - If checked, users are required to enter an ID to access POS.

9. **Default POS to Guest Member** - If checked, the POS will default to the Guest Member Account at the POS.

10. **Require Ticket Cover Count** – If checked, the user is required to select a cover count on every ticket.

> **Prompt for Cover Before Send** - Prompts the user to enter the cover count before sending items to the kitchen.
>
> **Prompt for Cover Before Table Select** - Prompts the user to enter the cover count before a table can be selected.

Select the cover count

0	1	2	3
4	5	6	7
8	9	10	11
12	13	14	15
16	17	18	19

More   Cancel ⊗

11. **Disable Gratuity Button on Settlement** – If checked, the gratuity button on the settlement screen will not be accessible.

Tender

$0.00

7	8	9	Clear Tender
4	5	6	Gratuity
1	2	3	Not Exempt ▼
0	.00	$10	
$20	$50	$100	Open Drawer
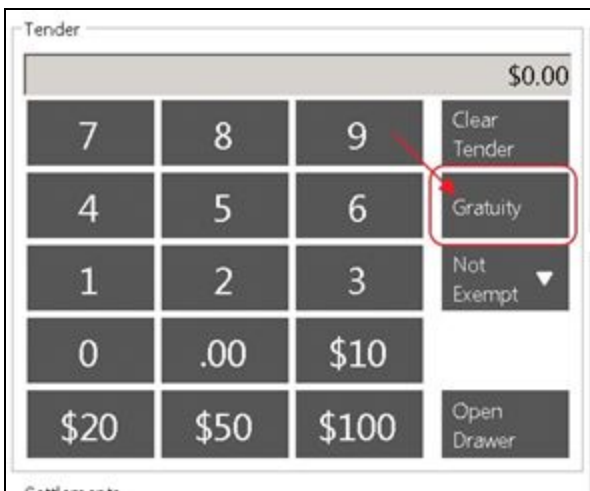
12. **Disable Gratuity Prompt with Credit Card** - If checked, user will not be prompted to enter a gratuity amount when tendering a transaction to a credit card.

13. **Discounts Do Not Change Service Charge** - If checked, discounts will not affect the Service Charge on the original total.
14. **Require Void Selection -** If checked, this selection will require Users to provide a reason for voiding an Item that has been previously sent.
15. **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.
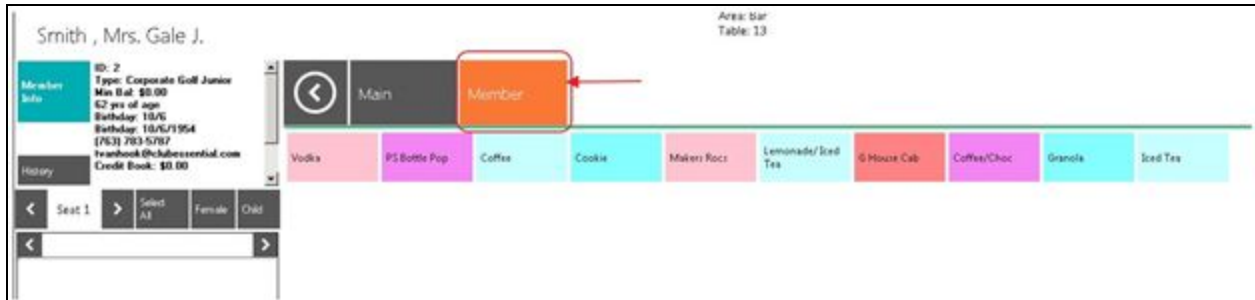
16. **Send on Exit** - When checked, the system will send unsent items upon exiting the system.
17. **Enable Mobile Ordering -** If checked, this function will enable the Mobile Ordering tab in the corresponding Area to then apply applicable Mobile Ordering settings. (See Mobile Ordering Guide for more detail.)
    Please Note: Enable Mobile Ordering will not be available unless Mobile Ordering has been purchased and the license has been activated.
18. **Send on Settlement** - If checked, when the user settles the ticket, the system will automatically send items to the kitchen/prep-printers.
19. **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 beers are selected, rather than have 2 separate lines, the POS will group them together on 1 line.


20. **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.
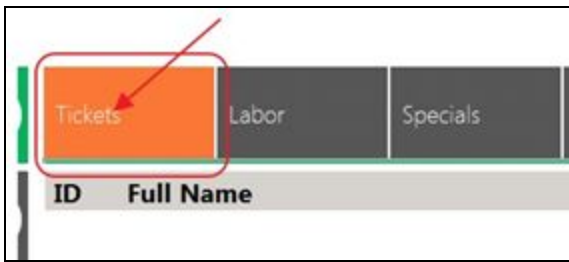
21. **Hide Dependents in POS** - Removes all Dependents from the POS Member Look-up.
22. **Show Company Toggle in Member Lookup at POS** - If a club has a multi-company setup and they want members from all companies to show in the POS, check this box to enable the **Company Toggle**.


23. **Hide Quick Cash** - If checked, the Quick Cash button will not be accessible.
24. **Show Meal Period Name on Statement** - If checked, the Meal Period name will show on the Statement for transactions completed within the Area.
25. **Hide Quick Member Charge** - If checked, the Quick Member Charge button will not be accessible.
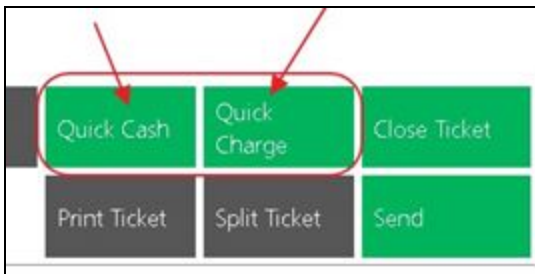
26. **Show Member Preferences** - If checked, Member Preferences will be accessible at POS.

27. **Hide the gift card balance button in POS** - This will remove the 'Gift Card Balance' button in the POS.
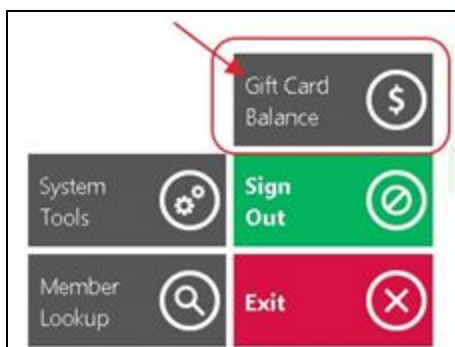
28. **Show Online Order Tab in POS** - If checked, the Online Orders will show in the main tab on the POS for quick access.
29. **Hide the 'Labor' Tab in POS** - If checked, the user will not be able to see the Labor Tab in this Area.
30. **Show POS Check-in** - This will display the check-in feature 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.
    a. **Member Check- In Item** - Select the Item to be charged when a member checks in.
    b. **Guest Check- In Item** - Select the Item to be charged when a guest checks in.
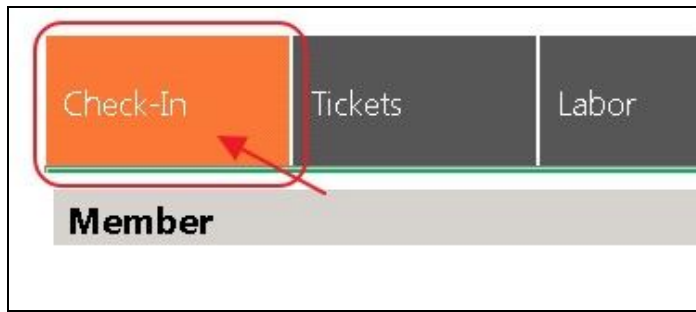
C. **Allow Family Check-In** - If checked, this setting allows Members to Check-In any additional family members who have an account at the Club.
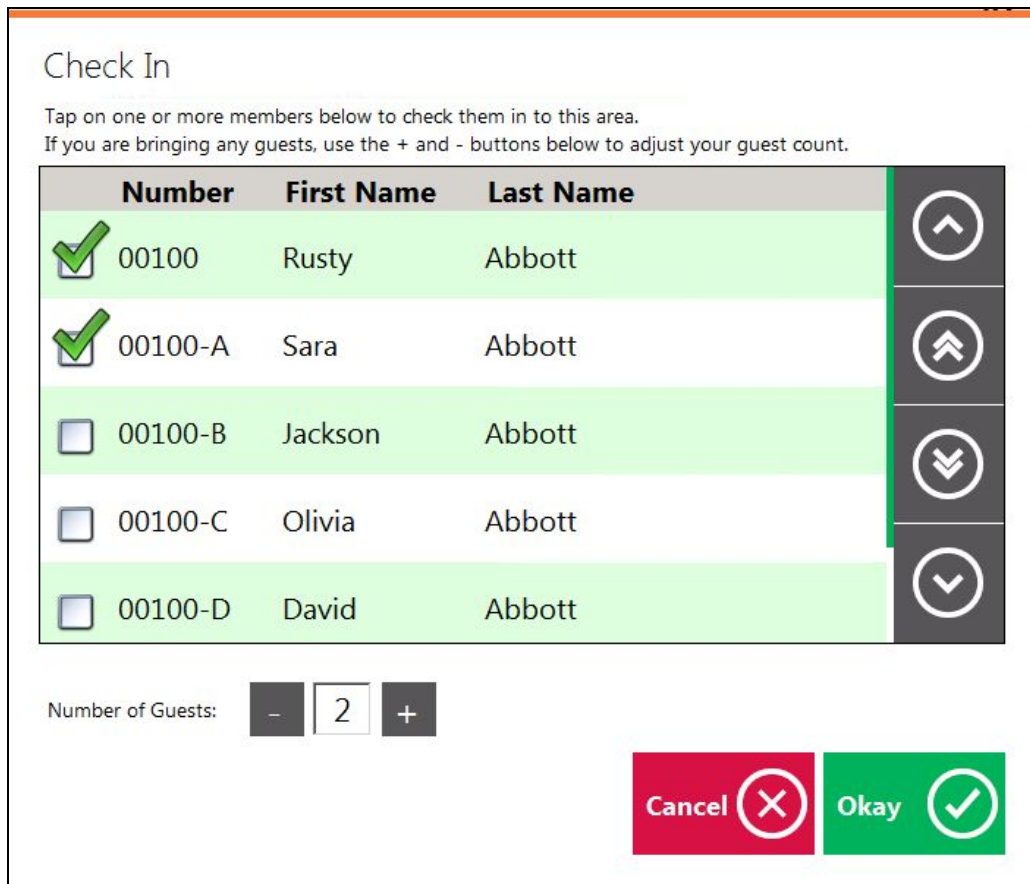
In addition, Members can specify any additional Guests accompanying them to the Club. Any applicable Guest Fees will be automatically applied to the Member's Check-In, as shown below.

31. **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.

32. **Prompt for member on seat in POS** - When using a pivot system and entering an order by seat, the system will prompt for member on each seat.

33. **Prompt for Send on Re-Order** - When using the reorder feature, the system will prompt the user if they would like to send the reorder items.

34. **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.
   a. **Print Email on Same Receipt** - If checked, the email entered will print on the receipt.
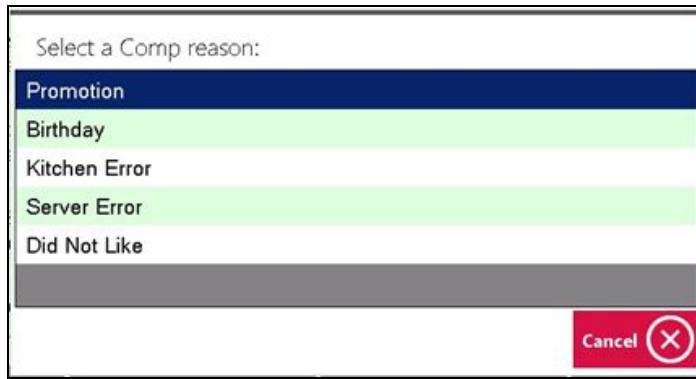
35. **Gratuity Override:** This setting gives Users the ability to override the Gratuity Account that is debited when additional gratuity is settled within the corresponding Area.

Buttons

Standard Messages can be created to help quicken the order entry process at the POS. These messages can either be **Special Instructions, Comp and Discount** reasons**, or Void** 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.
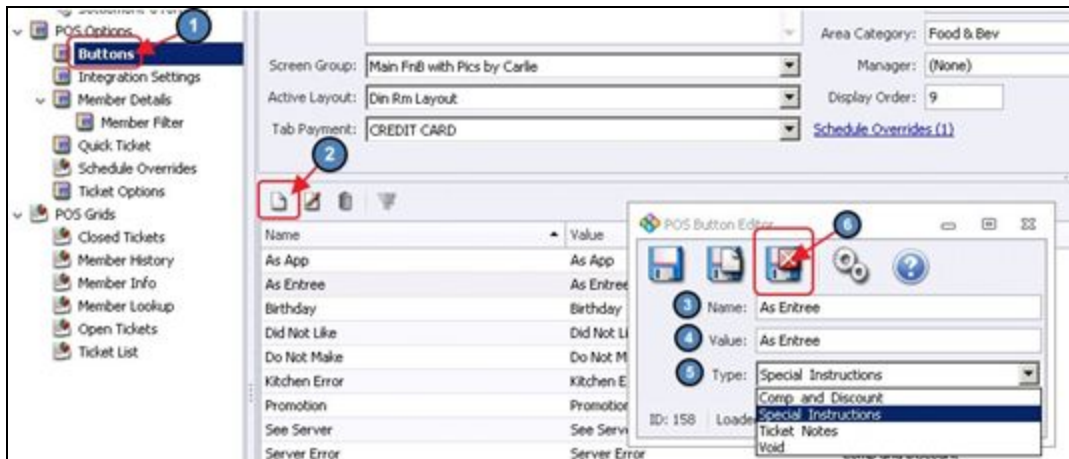

Comp and Discount

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.

Special Instructions

Special Instructions can be added to items and will appear when they are sent to the kitchen.
Any Button created with the **Special Instruction** Type will appear when the **Add Message** button is selected at the POS.
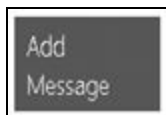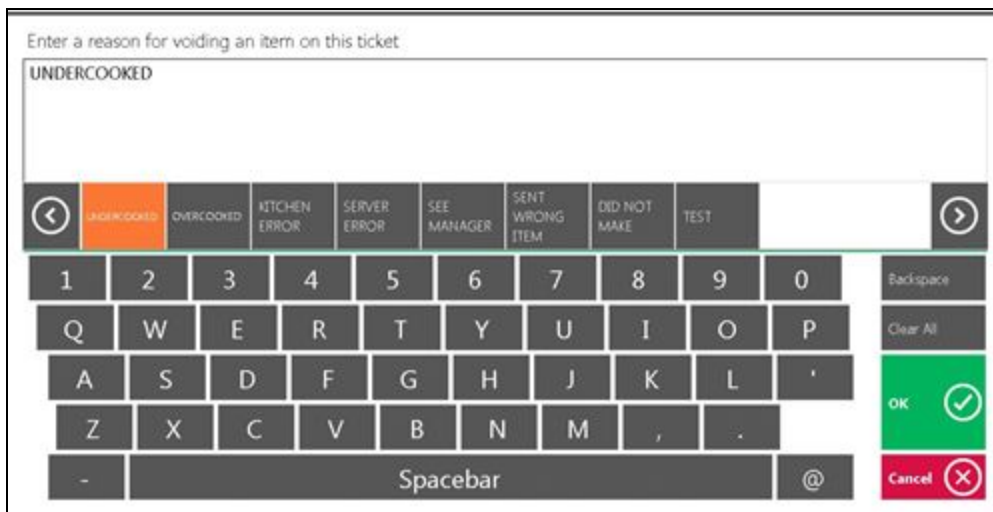
Void

Standard Void reasons can also be added when an **Item** or **Ticket** is voided.

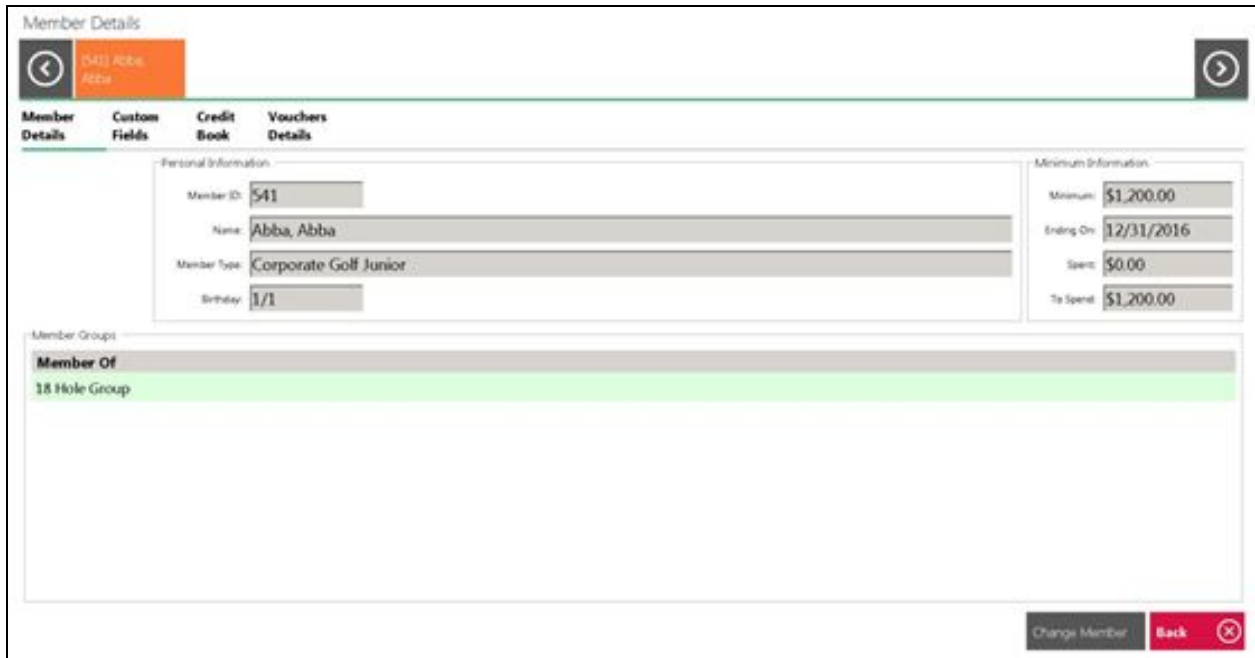Void reasons will only show after an Item has been Sent.

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
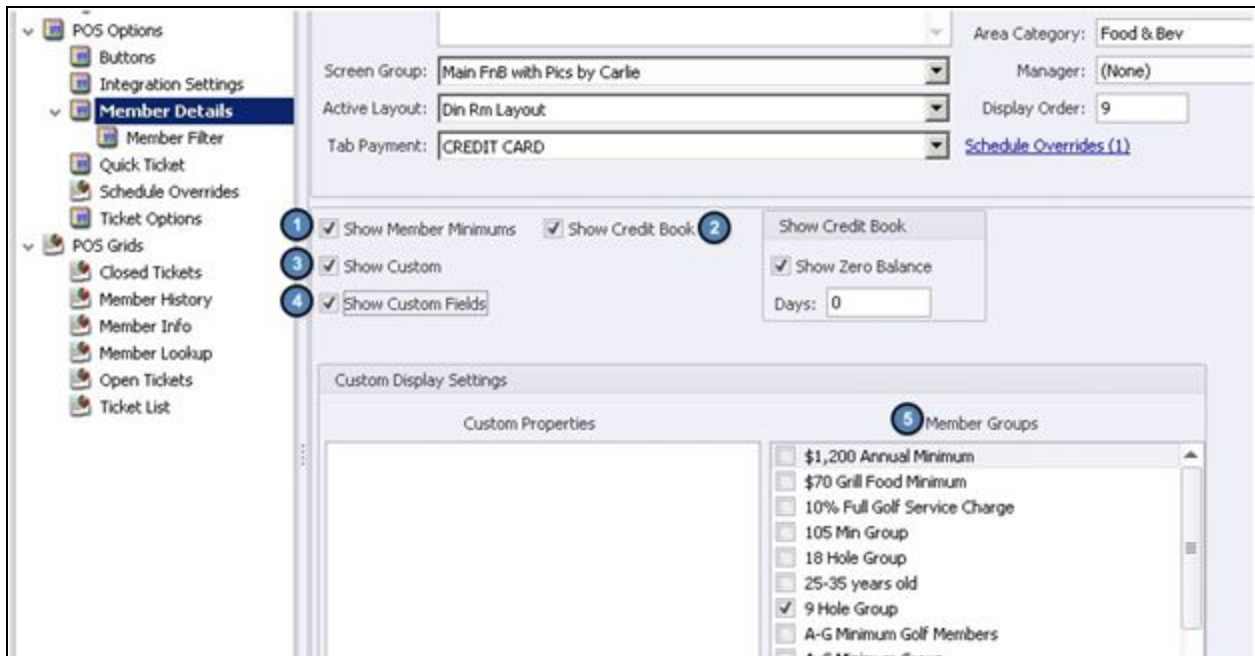
Member Filter

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.
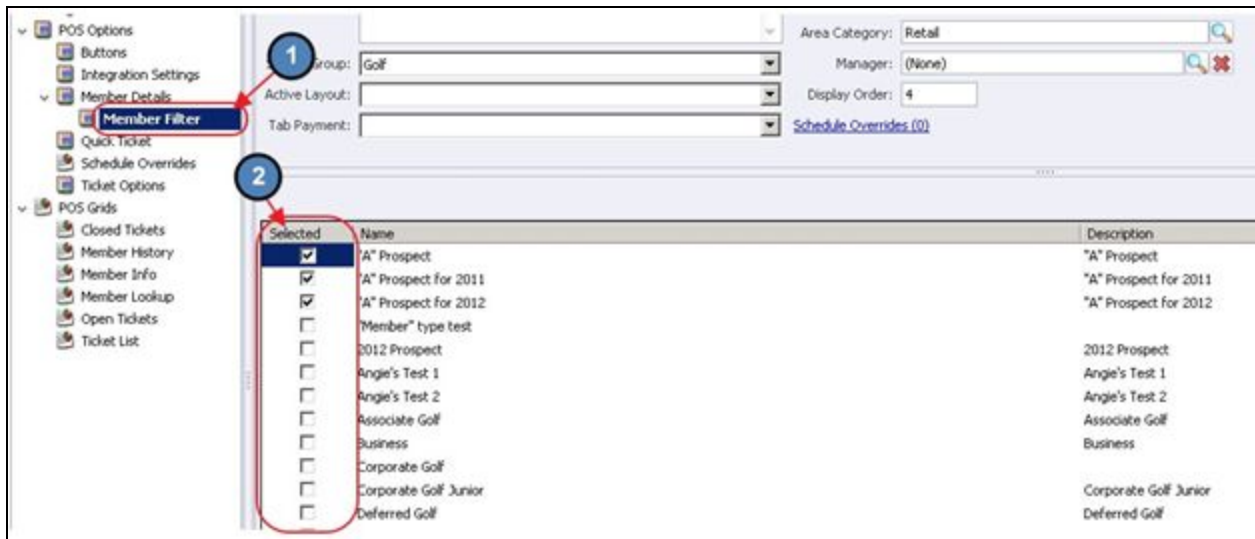

Quick Ticket

To enable the Quick Ticket feature at POS (only applicable to F&B Areas) navigate to the **Quick Ticket** tab and select the **Show Quick Ticket Button at POS**.

This option can also be configured to default to the Guest Member if desired. To do so, check the **Default to Guest Member** check box. Furthermore, the user can enter a **Default Cover** count for all Quick Tickets.

Also, 'Quick Ticket' can be configured to show as the **Table Name** on the Open Tickets Grid in the POS.
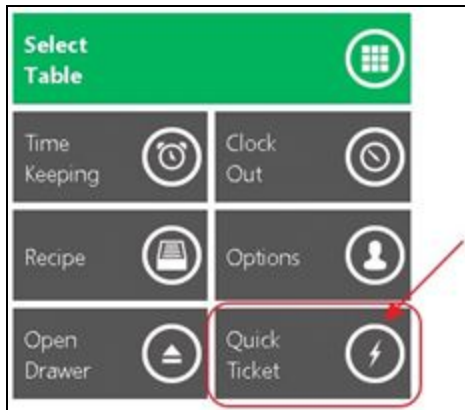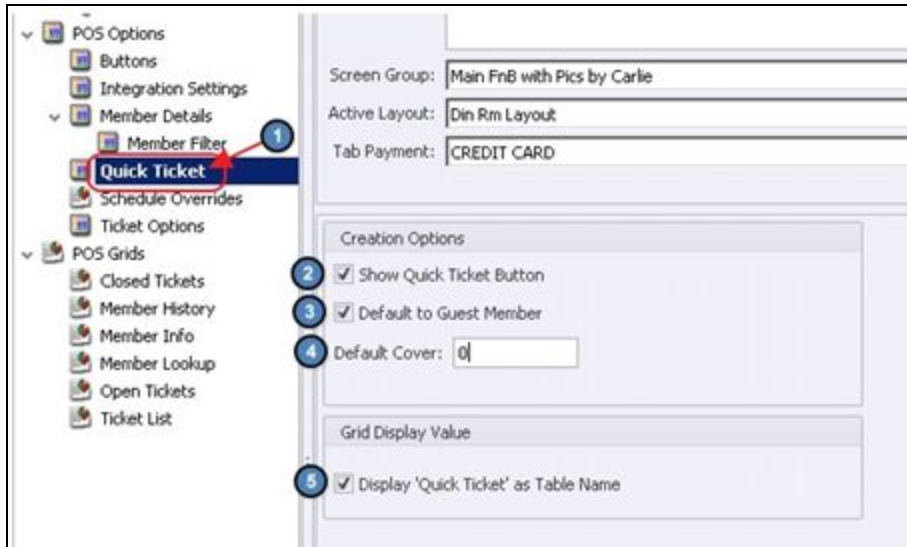
Schedule Overrides

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.
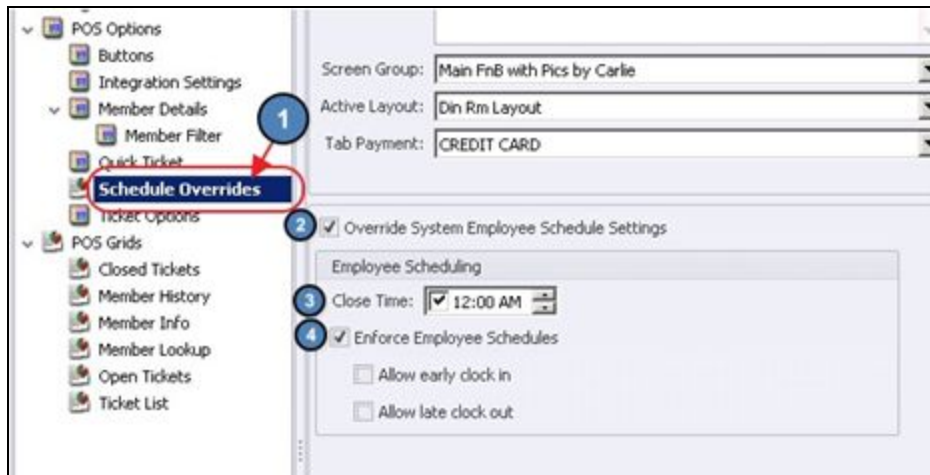
Once selected, additional options will populate.

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.
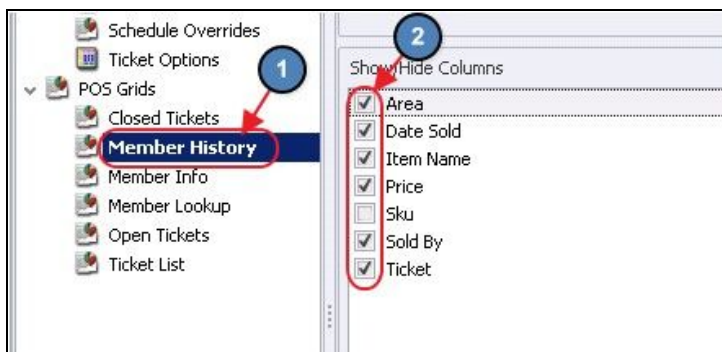

Member History

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.
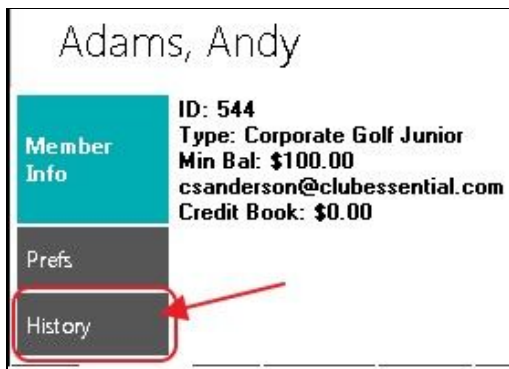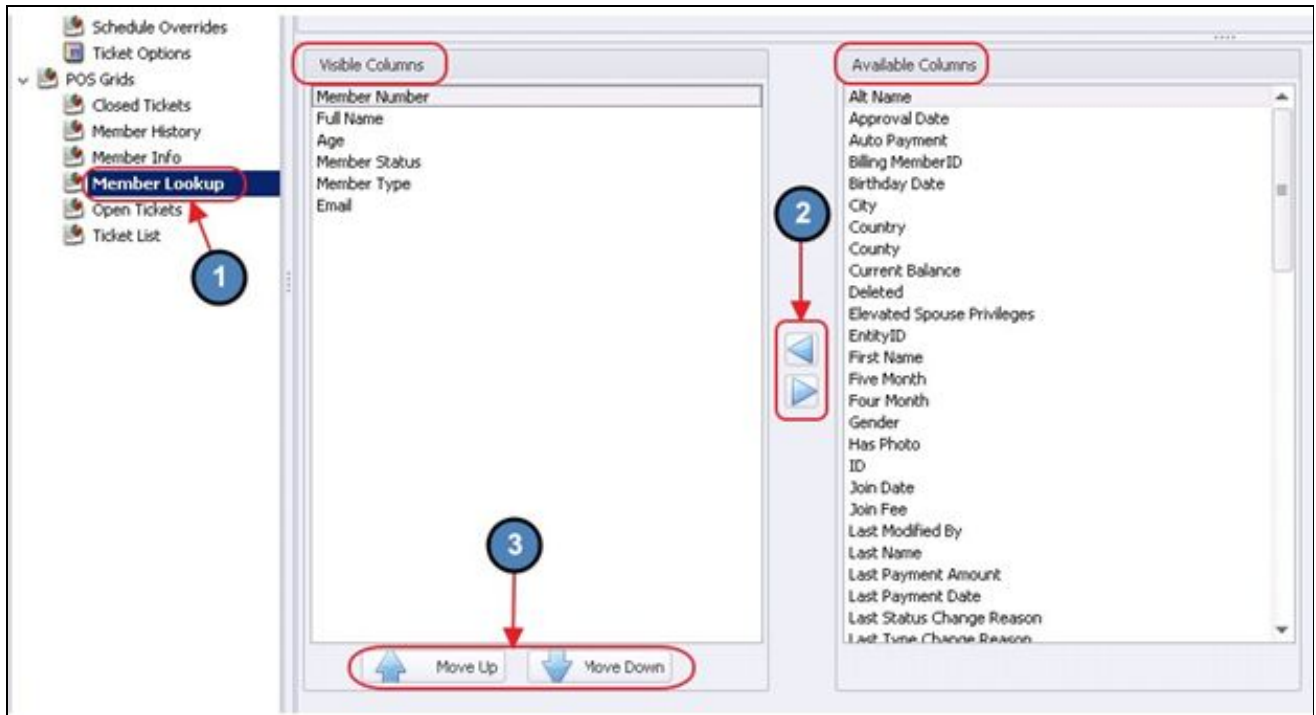
Member Info

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.
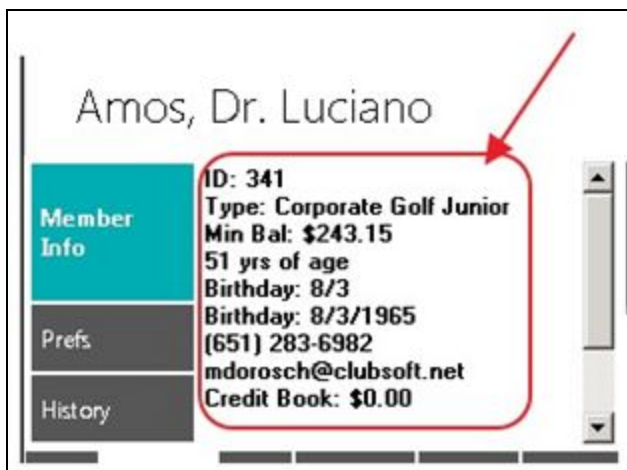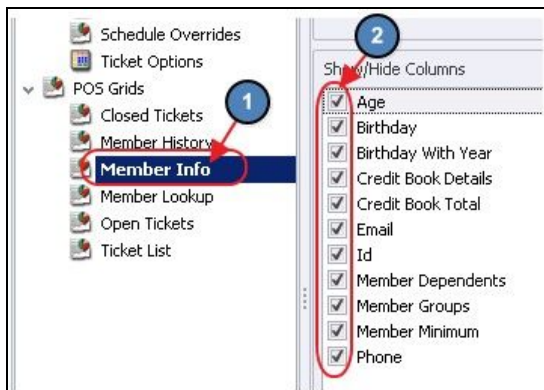
Member Lookup

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.

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.
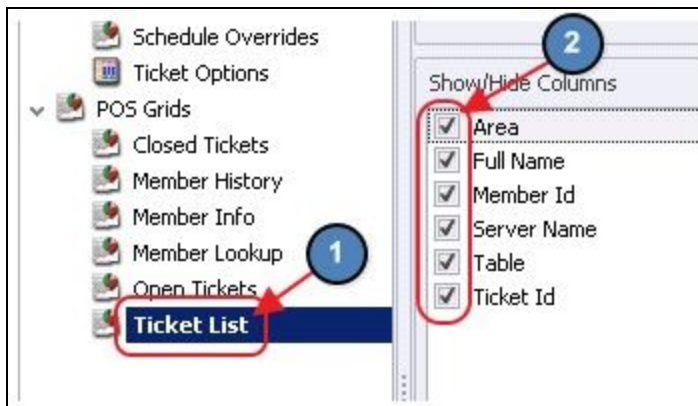
Ticket List

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.

Best Practices

- When setting up areas, ensure the settings in the system, align with the best possible operational flow of your respective F&B 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 Preferences, and/or enabling view-only access to Tee Sheets from the Dining area for planning purposes can increase your staff's ability to provide a better level of service to your Members.

FAQs

Q: 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?

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