# **G** POS Messages

2016 - Winter Edition

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### Overview

The Office System allows for member specific, employee specific, conditional, and delivery messages to be created and displayed at the POS. Member specific messages will show when the member is assigned a ticket at the POS, employee specific messages will show when the employee signs into the POS, and Conditional messages will show when the conditions are met at the POS.

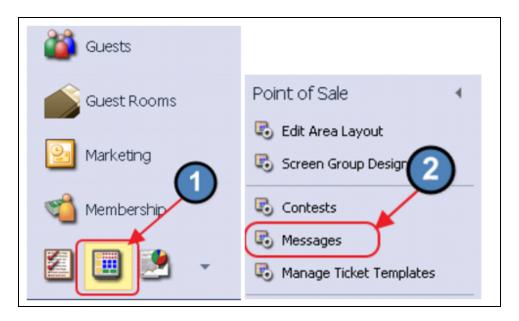
#### Use Case(s)

- Notify Server to contact Club Management when delinquent Member is dining.
- Send Member-specific food allergy alerts to the Member's Server.
- Send a reminder message to employees about a full staff meeting.
- Conditionally remind Staff to charge 18% gratuity on covers 8 or greater.

## Accessing the Tool

To access POS Messages,

1) Navigate to the **Point of Sale** module from the left user menu in CMA and select **Messages**.



2) The POS Messages Grid will launch.

| Ro Messages X   |            |            |              |
|---|------------|------------|--------------|
| Home  |            |            |              |
| Image: Weight of the second |            |            |              |
| Subject 🛞 Body  | 🐨 Urgent 🐨 | Delivery 👻 | Expiration 👻 |
| Don't Forget II Comment Cards   | 2          |            | 05/14/2013   |
| Delinquet Member Alert This member is seriously past due. Please notify a manager if they are on club property.   | 2          | 2          |              |
| Don't let this member use a ch Don't let this member use a charge in the Golf Shop  |            |            |              |
| Food Allergy-Onions This member is allergic to onions   | ×          |            |              |
| Ipending Limit Please contact management if bar tab is over \$150.00  | 2          |            |              |
| DO NOT CHARGE CREDIT CARD DO NOT CHARGE CREDIT CARD ON THIS MEMBER! PLEASE CONTACT ACCOUNTING WITH QUESTIONS.   | ×          | 1          |              |
| Ditra Sauce Always bring BDQ Sauce  | ×          | 1          |              |
| Staff meeting next Thursday Staff Meeting will be held in Conference Room 4:00  | 2          |            |              |

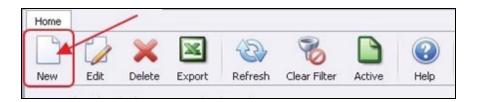
3) The primary functions associated with managing POS Messages are embedded in the POS Message setup screen, which can be accessed by double-clicking on an existing Message, or clicking the **New** button.

### Creating a New Message

To create a new Message,

Navigate to the **POS Messages Grid** and perform either of the following to launch the POS Message setup screen:

a. Click the **New** icon on the toolbar.



b. Right-click anywhere on the POS Messages Grid and select New.



The POS Messages setup screen will launch.

| R Messages | × 1000000000000000000000000000000000000 |   |                     |        |
|------------|---|---|---------------------|--------|
| Home New   | ×                                       |   |                     |        |
|            | ) 💹 📀                                   |   |                     |        |
| Subje      | set:                                    | 0 | Urgent              |        |
|            | dy:                                     | * | Delivery            |        |
|            |   |   | Conditional         |        |
|            |   |   | Enable Area Filters |        |
|            |   | Ĵ | 1                   |        |
| Expirati   | on: (none)                              |   |                     |        |
|            | m: Close Ticket                         |   |                     |        |
|            | on: Cover Count Greater Than 💌 Value:   |   |                     |        |
|            |   |   |                     |        |
| Employees  | Members                                 |   |                     |        |
| Selected V |   |   | V                   | Viewed |
|            | User, Administrative                    |   |                     |        |
|            | User, Clubsoft                          |   |                     |        |
|            | Doyle, Bill                             |   |                     |        |
|            | Dordal, Justin                          |   |                     |        |
|            | Bailey, Jessica                         |   |                     |        |
|            | Mlejnek, Jason<br>Dordal, Krista        |   |                     |        |
|            | Bulson, Jill                            |   |                     |        |
|            | Coker, Dustin                           |   |                     |        |
|            | Grun, Suzan                             |   |                     |        |
|            | Habig, Kelly                            |   |                     |        |
| i i        | Holwell, Cindy                          |   |                     |        |
|            | Klett, Michael                          |   |                     |        |
|            | Lavallee, Mickey                        |   |                     |        |
|            | Laraide, mickey                         |   |                     |        |

#### **General Information**

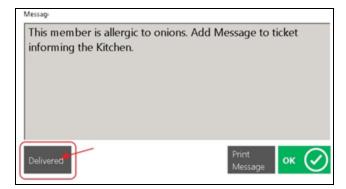
Complete Information as shown/listed below.

| 💀 Messages 🗙  |  |
|---------------|--|
| Home Delinque | et Member Alert 🗙  |
|               |  |
| Subject:      | Delinquet Member Alert Urgent  |
| 2 Body:       | This member is seriously past due. Please notify a manager if they are on club |
| -             | property.  |
|               | Enable Area Filters  |
| 3 Expiration: | ▼  |
| 8 Form:       | Close Ticket   |
| Ondition:     | Cover Count Greater Than Value 0   |

- 1. **Subject** Enter the Subject of the POS Message.
- 2. **Body** Enter the Body of the POS Message.
- 3. **Expiration** If the message has an expiration date, enter it here.
- 4. **Urgent** If checked, **Urgent** will display on the message in POS.



 Delivery - If checked, a Delivered button will populate on the message in POS. If selected, the message will not show again when the member is selected, or an employee signs in to the POS.



- 6. **Conditional** If checked, additional options will populate to specify the conditions of the message.
- 7. **Enable Area Filters** If checked, an additional tab will populate called **Areas**. If the message should only show in certain areas, please specify the applicable Areas on this tab.

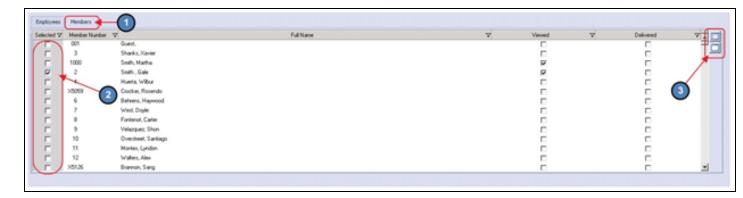
| Select Areas | 2 |
|--------------|---|
| Name         | ~ |
|              | 2 |
|              |   |
|              |   |
|              |   |
|              |   |
|              |   |
|              |   |

- 8. Form Only applicable when Conditional is checked. Leave this set to Close Ticket.
- 9. Condition Only applicable when Conditional is checked. Leave this set to Cover Count Greater Than.

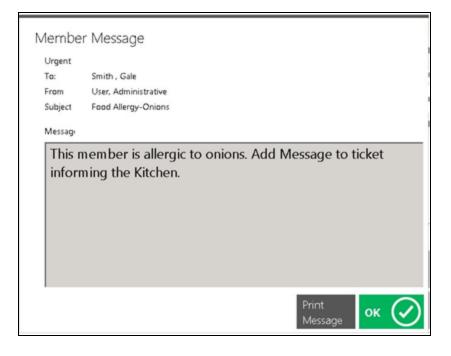
#### Member Specific Messages

A member specific message will show when the member is assigned a ticket at the POS. To specify the member(s) to receive the message:

Navigate to the **Members** tab and select the applicable members. Use the **Select All** or **Un-Select All** features in the right-hand corner, if applicable.



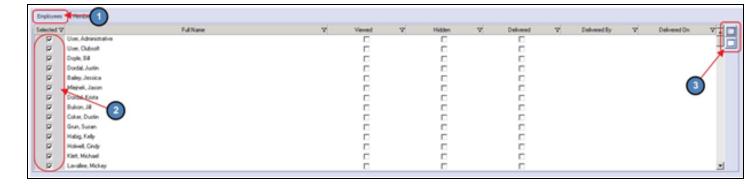
Again, when the member is assigned a ticket at the POS, the message will appear.



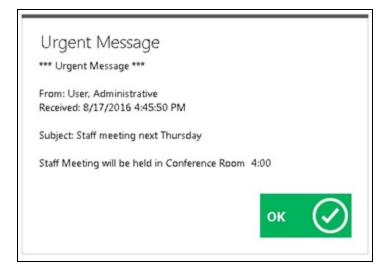
#### **Employee Specific Messages**

An employee specific message will show when the employee signs in to the POS. To specify employee(s) receive the message:

Navigate to the **Employees** tab and select the applicable employees. Use the **Select All** or **Un-Select All** features in the right-hand corner, if applicable.



Again, when the employee signs into the POS, the message will appear.



#### **Conditional Messages**

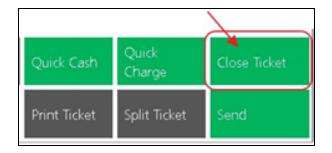
The Office system allows the user to create a Conditional Message that will populate on the Close Ticket screen in POS, when a ticket exceeds a specific Cover Count.

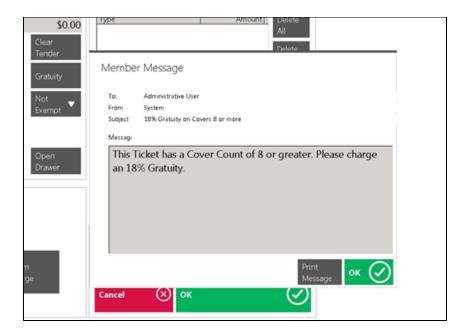
To create a Conditional Message, follow instructions shown/listed below.

| Ressages X    |   |   |                     |
|---------------|---|---|---------------------|
| Home 18% Gra  | abuity on Covers 8 or more 🛛 🗙  |   |                     |
|               | Markov (1997)   |   |                     |
| Subject:      | 18% Gratuity on Covers 8 or more  |   | Urgent              |
| Body:         | This Ticket has a Cover Count of 8 or greater. Please charge an 18% Gratuity. | ^ | Delivery            |
|               |   | ( | 2 Conditional       |
|               |   | Ŧ | Enable Area Filters |
| 3 Expiration: | (none)  |   |                     |
| Form:         | Close Ticket  |   |                     |
| Condition:    | Cover Count Greater Than Olivalue: 7  |   |                     |

- 1. Enter the **Subject** and **Body** of the message as normal.
- 2. Select Conditional.
- 3. Enter an **Expiration** date if applicable.
- 4. Form Leave this set to Close Ticket.
- 5. **Condition** Leave this set to Cover Count Greater Than.
- 6. **Value** Specify the Cover Count that needs to be exceeded for the message to appear.

Now, when a ticket at the POS has a Cover Count of 8 or more, a message will appear when the server selects **Close Ticket**.





#### **Delivery Messages**

Delivery Messages can be used to alert staff to provide a one-time message to a specific member.

To set up a Delivery Message, follow instructions shown/listed below.

| B Messages ×         |                                 |                                 |
|----------------------|---------------------------------|---------------------------------|
| Home Contact         | Club President ×                |                                 |
|                      | M 🕑                             |                                 |
| Subject:             | Contact Club President          | Urgent                          |
| Body:                |                                 | Conditional Enable Area Filters |
|                      |                                 | -                               |
| Expiration:<br>Form: |                                 |                                 |
| Condition:           | Cover Count Greater Than Value: |                                 |
| Employees            | Members 4                       |                                 |
| Selected V           | Member Mumber V                 | Full Name                       |
| Г                    | 001 Guest,                      |                                 |
|                      | 3 Shanks, Xavier                |                                 |
|                      | 1000 Smith, Martha              |                                 |
|                      |                                 |                                 |

- 1. Enter the **Subject** and **Body** of the message as normal.
- 2. Select Delivery.
- 3. Enter an **Expiration** date if applicable.
- 4. Select the member(s) that will trigger the message on the Members Tab.

Again, when the member is assigned a ticket at the POS, the message will appear. However, for a Delivery Message, there will be an additional option called **Delivered**. Select this field when the message has been delivered to the member. After delivered is selected, the message will no longer appear when the member is assigned a ticket at the POS.

This is mostly used to prevent the member from receiving repeated messages.

| Nembe            | r Message                         |                |                  |             |   |
|------------------|-----------------------------------|----------------|------------------|-------------|---|
| To:              | Smith , Gale                      |                |                  |             |   |
| From             | User, Administrative              |                |                  |             |   |
| Subject          | Contact Club President            |                |                  |             |   |
| If Gal<br>Presid | e Smith is at the club p<br>dent. | lease tell the | em to conta      | ct the Clul | b |
|                  |                                   |                |                  |             |   |
|                  |                                   |                |                  |             |   |
|                  |                                   |                |                  |             |   |
| Deliver          | ed                                |                | Print<br>Message | ок 🗸        | ) |

### **Best Practices**

Oftentimes, it is a good idea to establish a general format for writing messages to increase your Staff's ability to easily understand communicated messages. For instance, if a Member has a food allergy, use, "Attn: Dining - Food Allergy" to preface the message. Or for All Employee messages, include that it is an all employee message by starting the message with "Attn: All Staff" and then append the nature of the message prior to adding details - ie., Attn: All Staff -

Monthly Meeting". Using specific formats to highlight the audience as well as the topic can train staff to quickly and consistently interpret your Club's messages.

Keep tabs on your messages to ensure they are reaching the appropriate parties. To identify whether or not a message has been viewed or delivered, open the message in CMA and review the columns next to the assigned Employees or Members.

## **Frequently Asked Questions**

## Can I assign a message based on Membership Groups, rather than individual Members?

While POS messaging is a very useful way to deliver messages to Members, Member Groups do not integrate with POS Messaging. Utilize other methods of communication to reach targeted groups of Members such as blast emails, notifications, or text messages.

# If more than one message is assigned to an Employee/Member, will both messages display?

Yes, messages will display one at a time, until all assigned messages have been shown and acknowledged.