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.

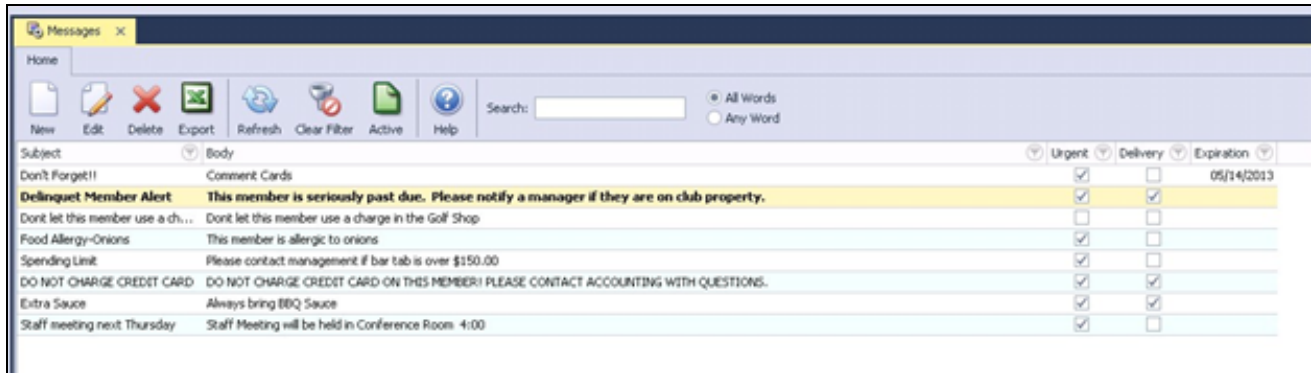- Conditionally remind Staff to charge 18% gratuity on covers 8 or greater.

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**.
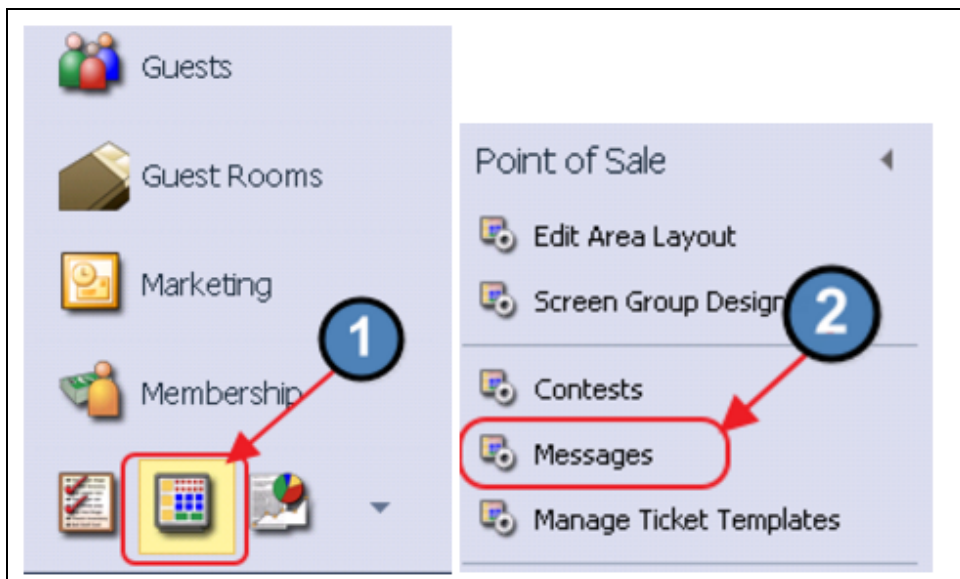
2) The POS Messages Grid will launch.

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.
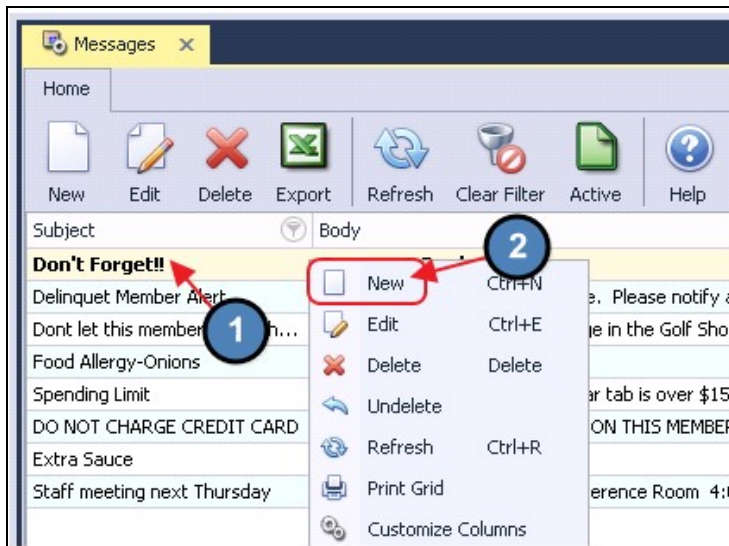
Creating a New Message

To create a new Message,

Navigate to the **POS Messages Grid** and perform either of the following to launch the POS Message setup screen:
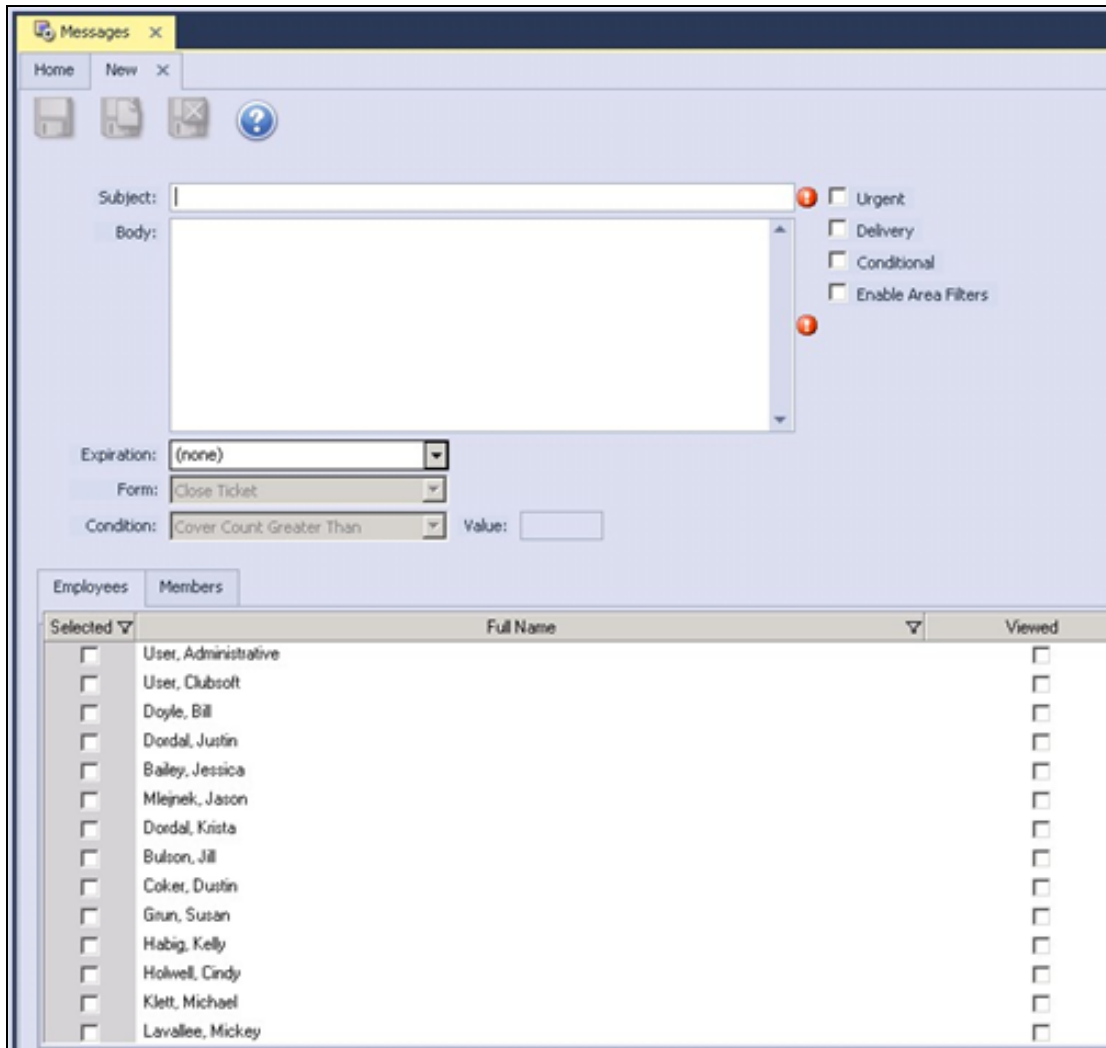
a. Click the **New** icon on the toolbar.

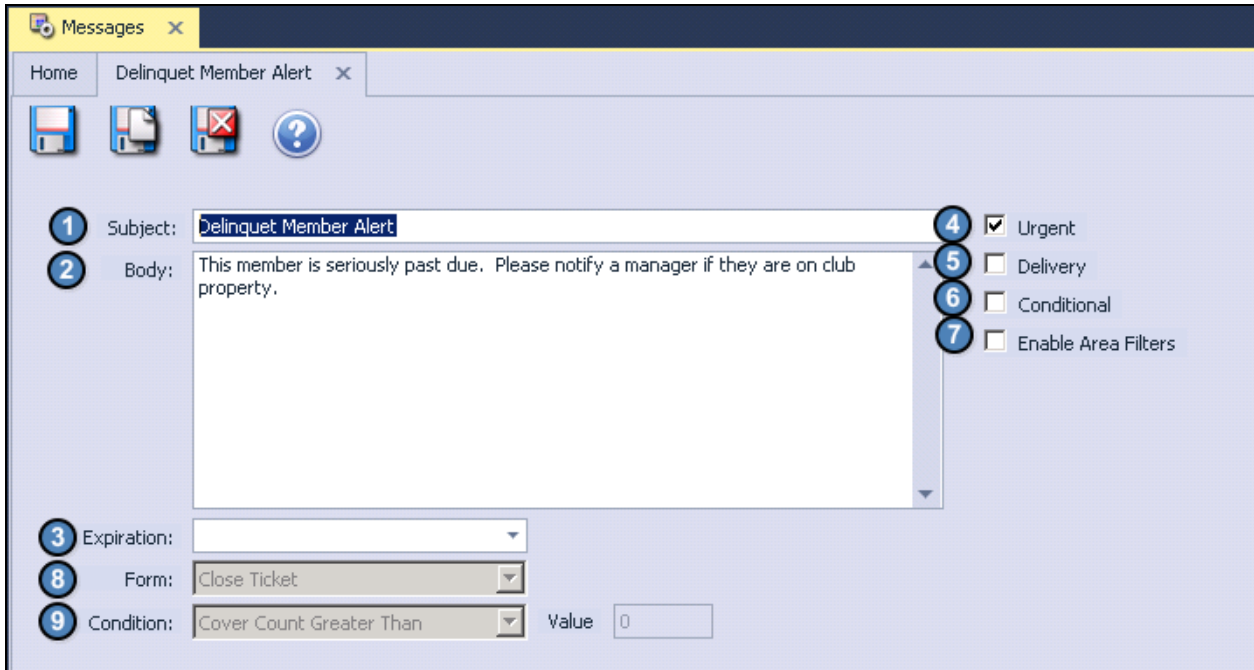b. Right-click anywhere on the POS Messages Grid and select **New.**

The POS Messages setup screen will launch.

General Information

Complete Information as shown/listed below.

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.

5. **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.
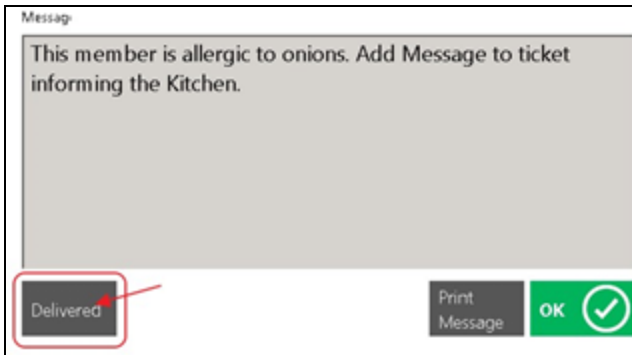
6. **Conditional** - If checked, additional options will populate to specify the conditions of the message.

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.
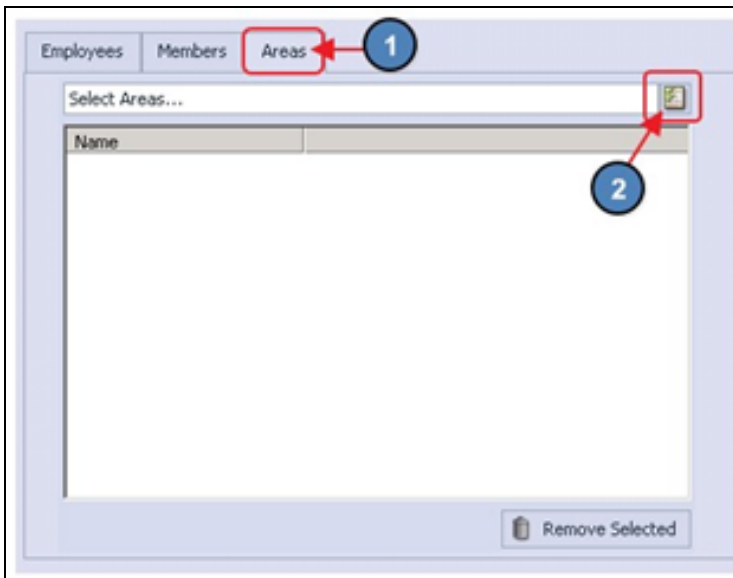
8. **Form** - Only applicable when **Conditional** is checked. Leave this set to **Close Ticket**.

9. **Condition** - Only applicable when **Conditional** is checked. Leave this set to **Cover Count Greater Than**.

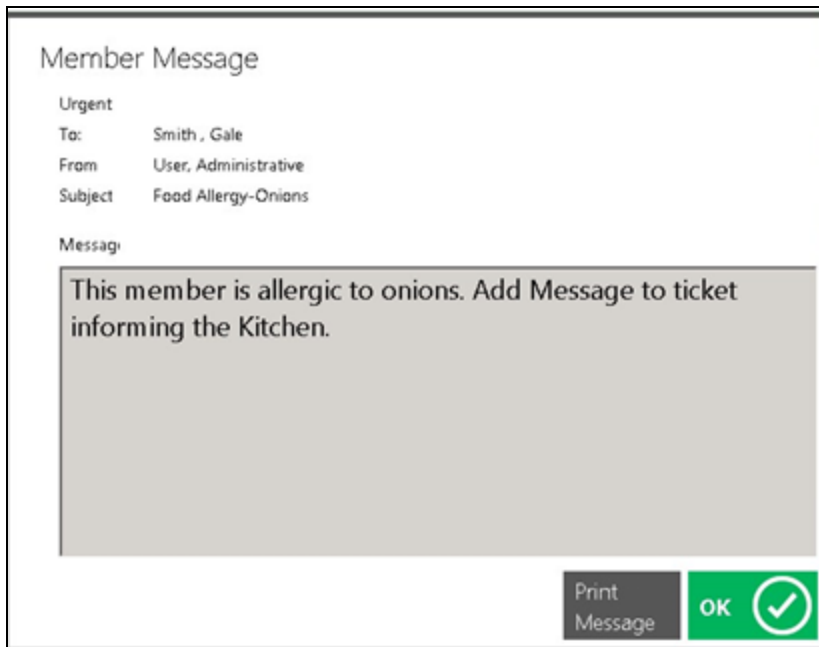# Member Specific Messages

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.
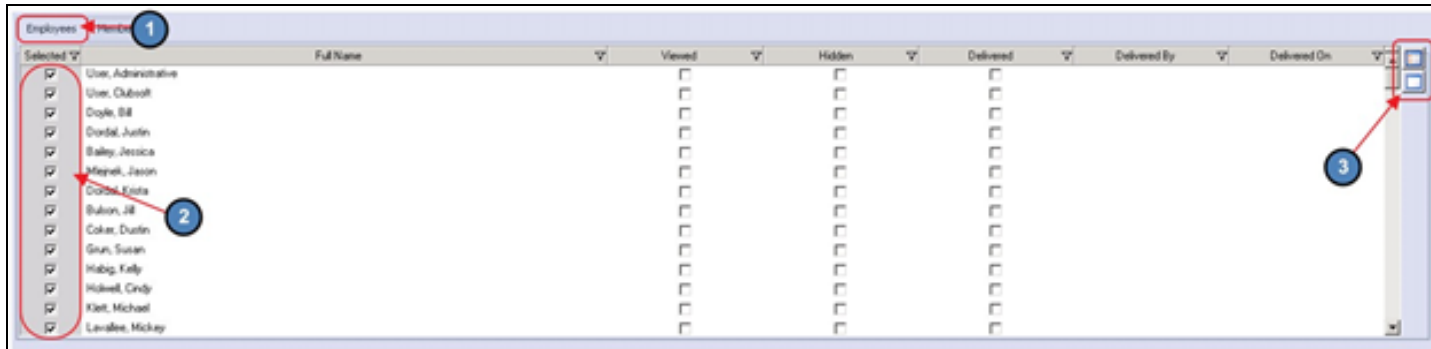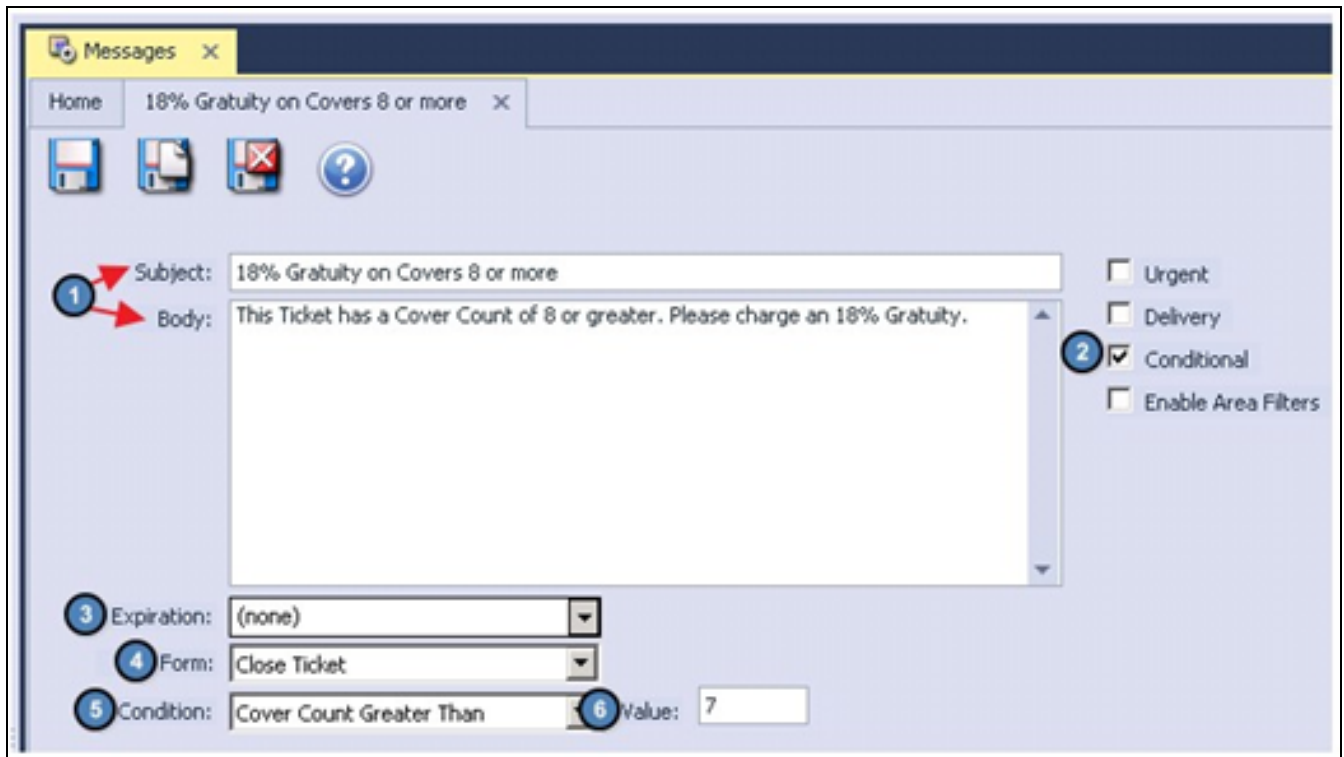

Again, when the employee signs into the POS, the message will appear.
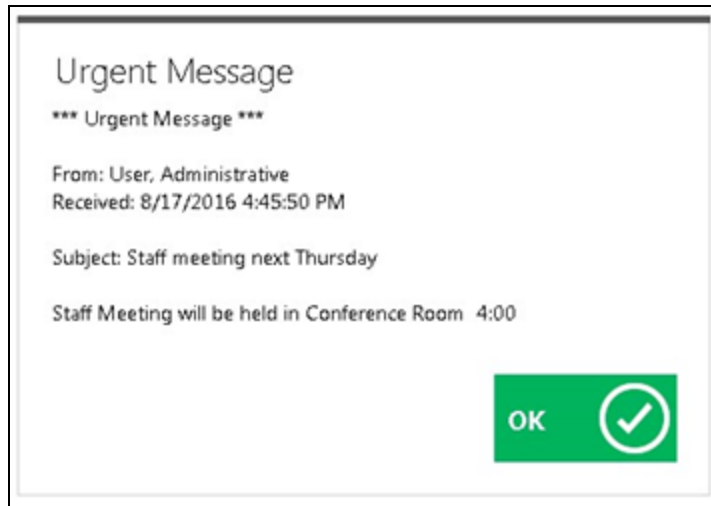

Conditional Messages

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.

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**.
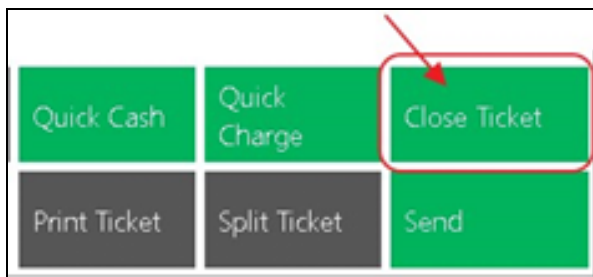
Delivery Messages

Delivery Messages can be used to alert staff to provide a one-time message to a specific member.
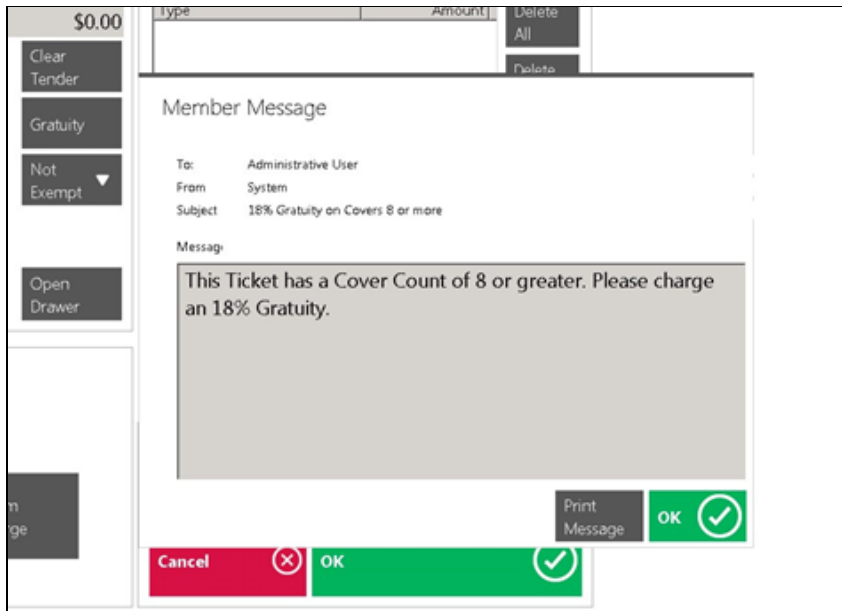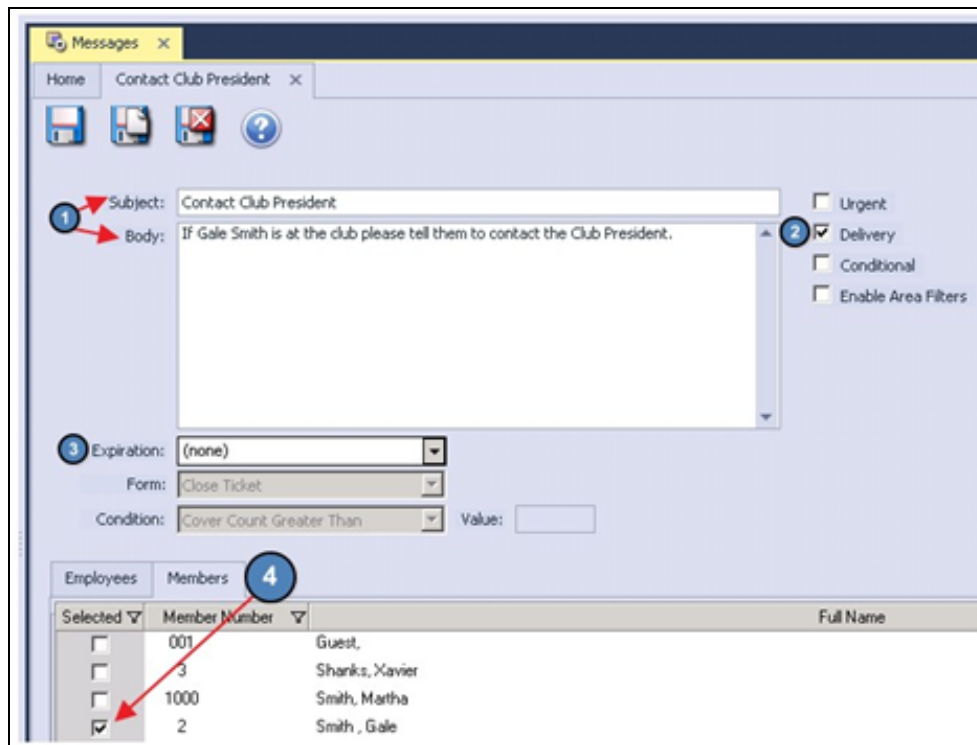
To set up a Delivery Message, follow instructions shown/listed below.

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.
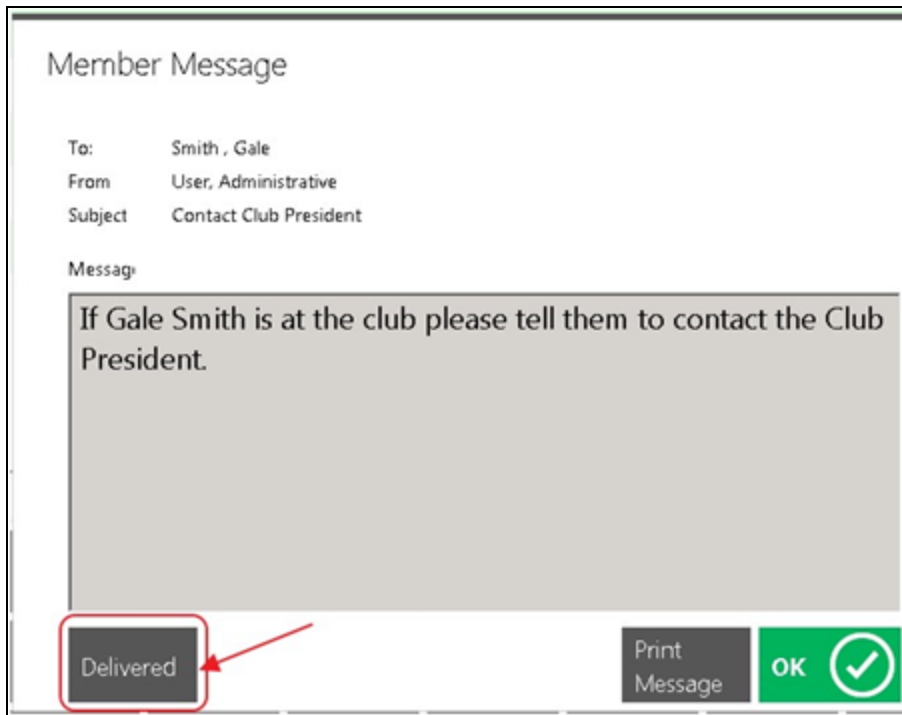
Best Practices

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.