

# 12.05.16 Releases

## User Guide - Table of Contents

### [Enhancements](#)

[Club Intelligence - Open Ticket Dashboard](#)

[Employees - Groups - Roles](#)

[General Ledger - Budgets](#)

[POS - Tee Sheet - Ticket Printing](#)

[3rd Party Integrations](#)

[General UX Improvements](#)

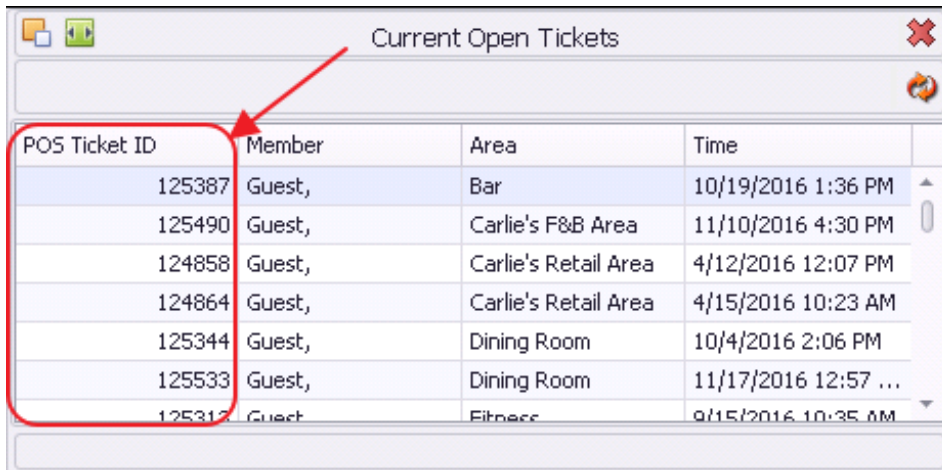
### [Bug Fixes](#)

# Enhancements

## Club Intelligence - Open Ticket Dashboard

- Updated the Open Ticket dashboard to always show the POS Ticket ID column by default.

Use Case: Quickly research details of an open ticket by identifying the ticket number when first opening the open ticket dashboard.



POS Ticket ID	Member	Area	Time
125387	Guest,	Bar	10/19/2016 1:36 PM
125490	Guest,	Carlie's F&B Area	11/10/2016 4:30 PM
124858	Guest,	Carlie's Retail Area	4/12/2016 12:07 PM
124864	Guest,	Carlie's Retail Area	4/15/2016 10:23 AM
125344	Guest,	Dining Room	10/4/2016 2:06 PM
125533	Guest,	Dining Room	11/17/2016 12:57 ...
125312	Guest,	Fitness	9/15/2016 10:35 AM

## Employees - Groups - Roles

- Updated the system to add a new POS Terminal security role called 'Allow Item Management'. By default all users with rights to POS->System Tools will get this role.  
Use Case: Enable users to make changes (price, countdown or daily special settings) to an Item within the system tools section of the POS by assigning this role (if not already auto-assigned). Conversely, prevent users who may have access to System Tools from making edits to Items by disabling this role.

Home Server

Name: Server

Description:

Display Recipe Button at POS Terminal  Administration Group

Training Mode

Areas Employees Roles Departments

Insufficient permission

Category: All

Role	Category	View	Edit	Create	Delete
Accounting Reports	Reports	<input type="checkbox"/>			
Accounts Payable Dashboard	A/P	<input type="checkbox"/>			
Address Categories	System	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Allow Folio Lookup Override	POS Terminal	<input type="checkbox"/>			
Allow Item Management	POS Terminal	<input type="checkbox"/>			
Allow Login Override	POS Terminal	<input type="checkbox"/>			
Allow Member Financial Display	Membership	<input type="checkbox"/>			

System Tools

Locked Tickets Open Tickets Closed Tickets **Items** Reports Utilities About

Search

Name	Count
Food Minimum	
Finance Charge	
Corporate Golf Single Dues	
Corporate Golf Family Dues	
Reciprocal Club Fee	
Debt Service	
Associate Dues	
Surviving Spouse Dues	
Prepaid Dues No Tax	
Social Dues	
Senior Dues	
Intermediate Dues	
Mill River	
Locker Rental	

Override the item price

\$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	

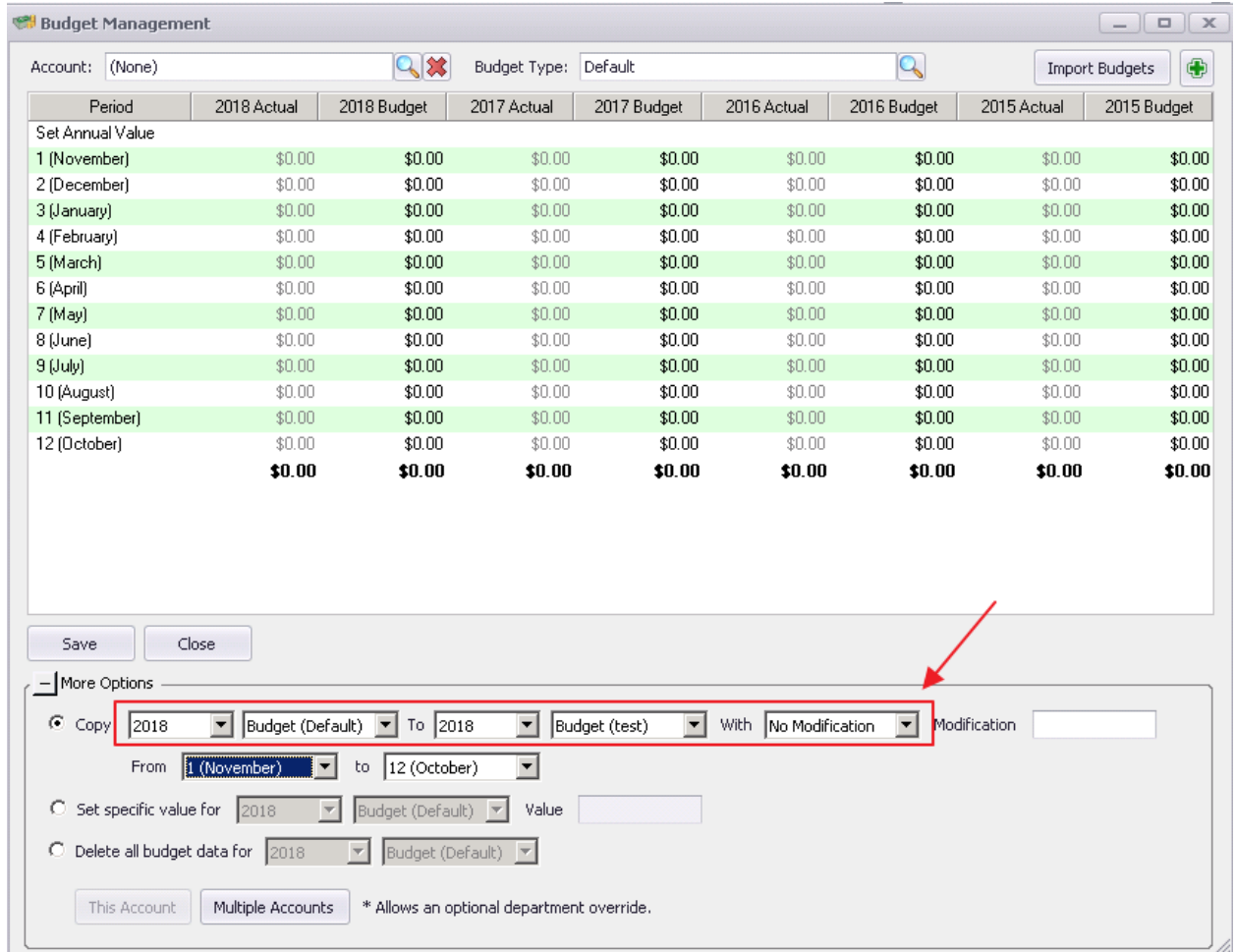
Countdown: 0  x86  Track Countdown  Show All Items  Show Countdown Items

Price: \$0.00  Daily Special  Show Qty Count

Save

## General Ledger - Budgets

- Updated the Budget Wizard to allow users to copy to and from budgets in future years.**  
Use Case: Club Management would like to review several budget scenarios for a future year. To quickly populate another scenario, copy values from first budget generated, and use the modification feature (fixed \$ or %) as desired.



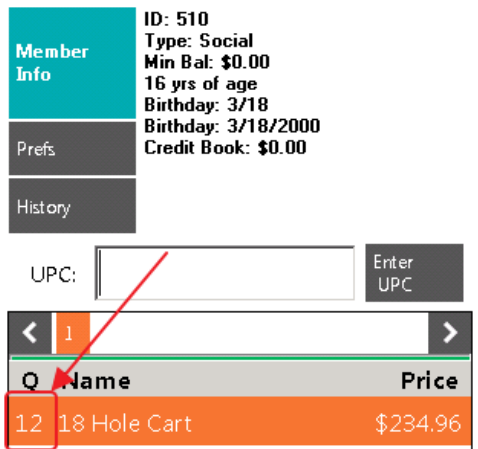
The screenshot shows the 'Budget Management' window. At the top, there are fields for 'Account: (None)' and 'Budget Type: Default', along with an 'Import Budgets' button. Below this is a table with columns for 'Period', '2018 Actual', '2018 Budget', '2017 Actual', '2017 Budget', '2016 Actual', '2016 Budget', '2015 Actual', and '2015 Budget'. The table contains 12 rows of monthly data, all with '\$0.00' values. At the bottom of the table, there are 'Save' and 'Close' buttons. Below the buttons is a 'More Options' section. A red box highlights the 'Copy' option, which includes dropdowns for '2018', 'Budget (Default)', 'To 2018', 'Budget (test)', and 'With No Modification'. A red arrow points to the 'With No Modification' dropdown. Other options include 'Set specific value for' and 'Delete all budget data for'.

Period	2018 Actual	2018 Budget	2017 Actual	2017 Budget	2016 Actual	2016 Budget	2015 Actual	2015 Budget
Set Annual Value								
1 (November)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
2 (December)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
3 (January)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
4 (February)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
5 (March)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
6 (April)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
7 (May)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
8 (June)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
9 (July)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
10 (August)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
11 (September)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
12 (October)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>

## POS - Tee Sheet - Ticket Printing

- Updated the POS Tee Sheet integration to group similar fee items when automatically generating tickets.**  
Use Case: A company outing will include 12 people and each will have 1 green fee, and 1 cart fee. Instead of listing 12 green fees and 12 cart fees individually on the ticket (resulting in a very long printed ticket), the ticket will now summarize or group like items

together such as (12) green fees, and (12) cart fees, and therefore, print a much more manageable ticket.



## 3rd Party Integrations

- Updated the timeout value to 5000ms from 2000ms for POS charges posted through the CONTROL interface to 3rd party PMS systems.

Use Case: Experience success (rather than timeouts) when processing POS charges to certain Property Management Software systems with this behind the scenes functionality upgrade.

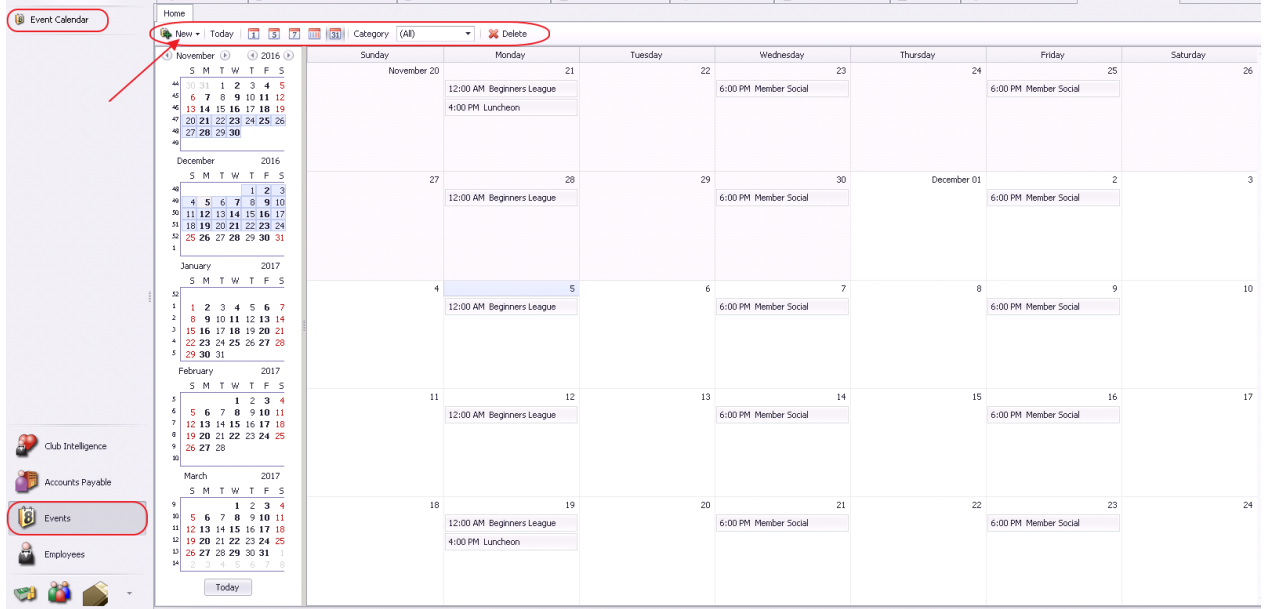
- Updated the logging for Oracle PMS integration to add selected room number and name.

Use Case: This behind the scenes enhancement now ensures selected room number and name are also included in the Oracle Interface.

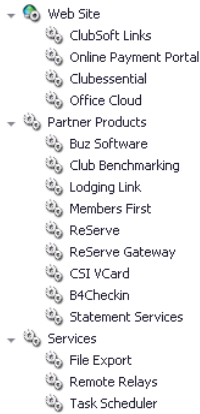
## General UX Improvements

Use Case: Navigating, entering data, and selecting dates is now easier with this upgraded technology and these responsive form improvements.

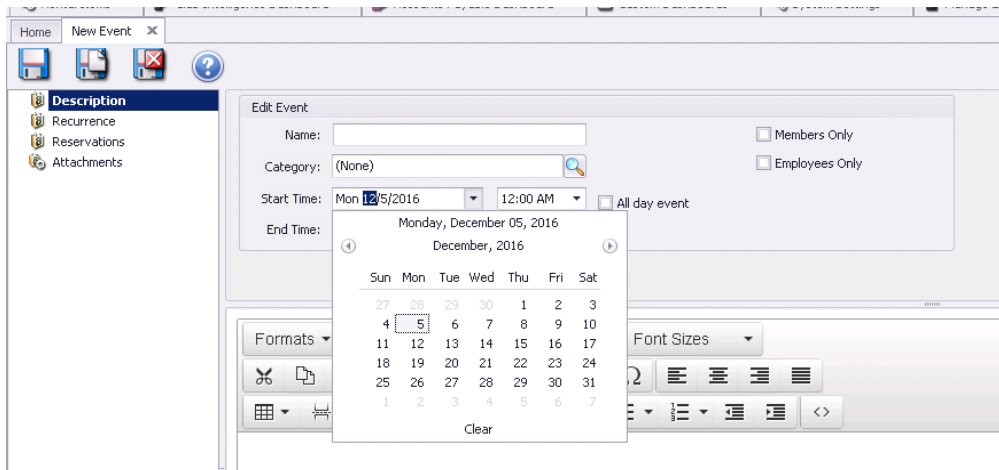
- Updated the Event Management Calendar with an updated user interface control.



- Updated all legacy Tree View with updated user interface controls.



- Updated all legacy Calendar pickers with updated user interface controls.



- **Updated all legacy toolbars with updated user interface controls.**

File Accounts Payable Events Employees General Ledger Guests Guest Rooms Membership POS System Help

## Bug Fixes

- Fixed an issue with the Pay Bills form that allowed users to click Save without selecting any payments.
- Fixed an issue with the Payment Batch report showing an error when trying to render a payment with an empty check number.
- Fixed an issue with the budget editor retrieving budgets for the default budget type instead of the budget type specified in the editor when copying from multiple accounts.
- Fixed an issue where the system could error when deleting Open Edge enrolled credit cards in CMA.
- Fixed an issue where you could delete an item even if it was being used in the ReServe Cloud interface.
- Fixed an issue where the Area Layout form would crash when cutting and pasting elements.
- Fixed an issue with the GL Overview form crashing when moving a top-level node up or down.
- Fixed an issue with the Item Sales by Tender Type report excluding invoices with no invoice payment records.
- Fixed an issue with the Tax Code Item edit form where it was showing the wrong options on the rules combo box.
- Fixed an issue with employee names not showing up for Employee Hours Worked on Employee Dashboard.
- Fixed an issue where you could not choose (None) for a member in the Rental Item edit form.
- Fixed an issue with the Items Purchased by Member report showing inconsistent gratuities when grouping by Member Family versus Member/Age/Member Type.