Office - 8.28.17 Releases

## User Guide - Table of Contents

Enhancements

Membership - Credit Book Types

- **Improves how the system handles credit book types that filter by Item Category to allow for overlapping Credit Book Types.**

  Use Case: Previously, when Credit Book Types with Item Category Filtering overlapped, the system would prompt an error and would not allow the overlapping Credit Book to be saved.

  Previous Error:
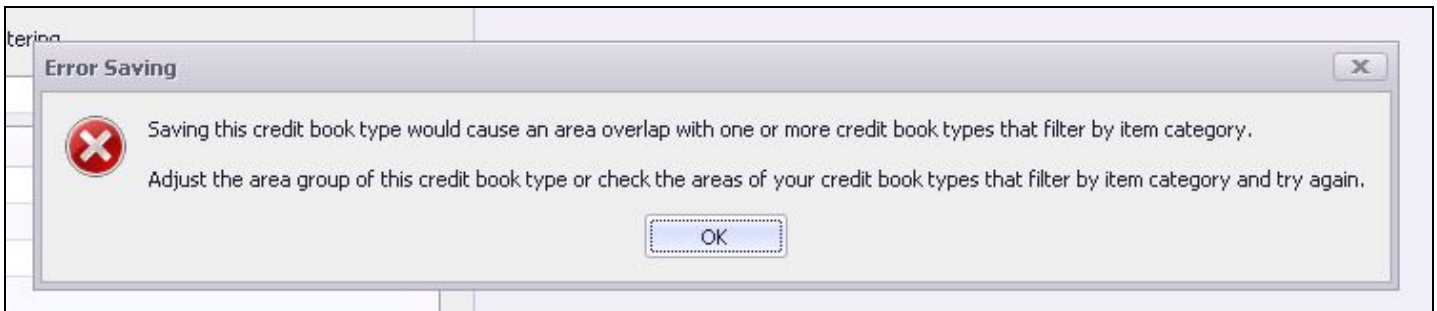
  Now, create overlapping Credit Books within Areas, and successfully manage payment application in the POS for the multiple Credit Book Types.

  For example, a Credit Book Type allowing All Item categories to be applied and a separate Credit Book Type filtered to Food & Beverage Items only (alcohol excluded) can be created in the Membership module, and payment application can now be managed directly in the POS when settling a ticket. See below enhancement for more information.
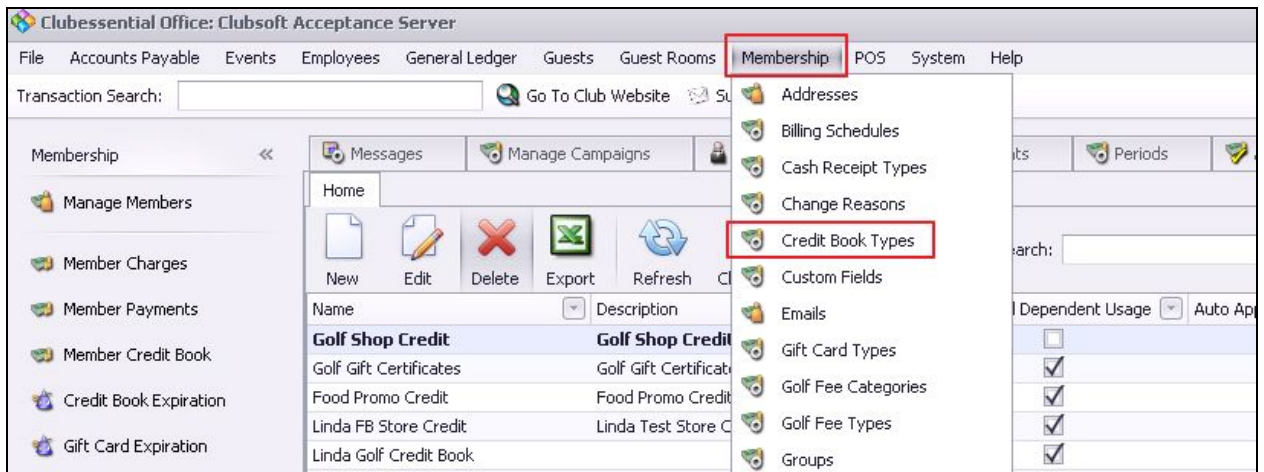
POS - Credit Book Settlement

- **Added a new Credit Book selection dialog to POS that allows a user to better handle the application of available credit books to a ticket when a member has multiple credit book types that can apply to one or more items on the ticket.**

  Use Case: Previously, as noted above, credit book types with Item Category filtering that overlapped could not exist. Now, easily manage overlapping Credit Book types when settling a ticket at the POS. Available (or total balance on the credit book) will be displayed for reference. **Eligible** amounts are calculated based on Item Filters in the Credit Book setup, and are the balances that may utilized. Choose **Manual** to enter specific amount(s) to selected Credit Books, or choose **Max** to apply all eligible charges to selected Credit Book.

For example, the ticket total shown is $29.99, with the $3.35 Bud Light being the only item not eligible for the **Weekend Promo** Credit Book option listed above (as alcohol was intentionally excluded when setting up this credit book). When Credit Book settlement option is selected for payment at the POS, Credit Book selection dialog box opens, and eligible amounts are calculated.

As seen below, the **Weekend Promo** covers everything but Alcoholic Beverages ($26.32). The User now has the option to use the **Bar and Lounge** Credit Book or the **Food Promo Credit** to cover the remaining amount ($3.67, Bud Light plus taxes and service fees).

Q	Name	Price	S	C
1	Seafood Salad	$15.95	1	2
	-ADD SALMON	$4.50		2
1	Bud Light	$3.35	1	0

Subtotal:	$23.80
Service Charge:	$4.09
Tax:	$2.10
Total:	$29.99

Credit Book Payment

Description	Eligible	Available	Amount			
Bar and Lounge	$3.67	$25.00	$0.00	ual	Max	Clear
Weekend Promo	$26.32	$45.00	$26.32	Manual	Max	Clear
Food Promo Credit	$3.67	$50.00	$0.00	Manual	Max	Clear

System - System Settings - Online Payment Portal Sync
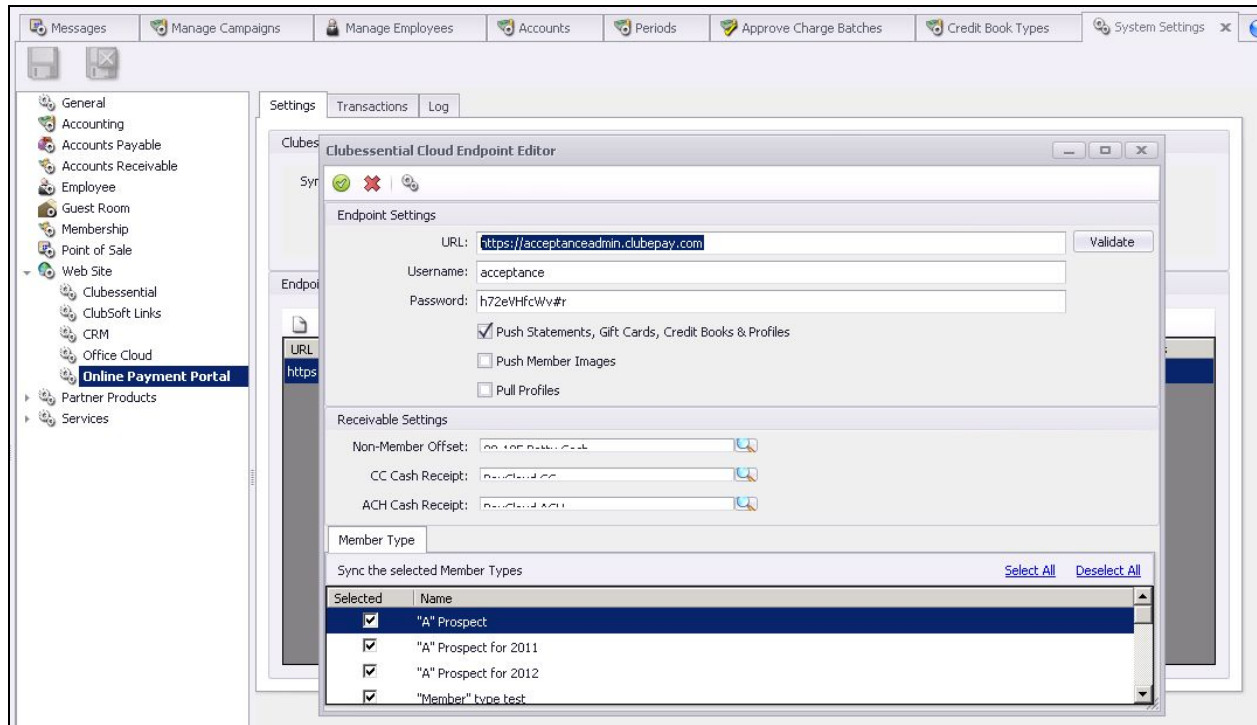
Non-Standard Member Number Sync

- **Updated the online Statement and Payment Sync process to better handle non-standard member number formatting.**

  Use Case: Previously, the online Payment and Statement Sync Process would reformat non-standard member numbers in an effort to sync standardized data, however, this process was periodically causing Member Number duplicates and other errors. Now, the Sync process handles these non-standard member numbers as-is (rather than reformatting them), and therefore no longer creates duplicate numbers or errors when syncing payments and statements.

Member Number Changes

- **Updated the online Statement and Payment Sync process to better handle Statement, Credit Book and Gift Card balances after a member changes their number.**

  Use Case: Previously, after a member number change, errors sometimes resulted when syncing Statements, Credit Books, and Gift Card balances to the correct member number. Now, improved functionality enables the system to more accurately identify and track changes in member numbers and the related data, and adjust the data sync accordingly.

Bug Fixes

- Fixed issue in POS when settling to credit book so that it correctly applies to balances in the order of expiration.

- Fixed issue with POS Item Print Configurations when the end date wraps around to the next day (end time is less than the start time).

- Fixed issue with the Deleted Ticket Report returning duplicate records if a single ticket entry had more than one manager authorization.

- Fixed issue with the new Member Payment wizard so that it pulls the AR Department from the Cash Receipt type first instead of System Settings.

- Fixed issue with the new Member Charge wizard to not show $0 ledger entries in the batch posting preview.

- Fixed issue with the new Quick Check form, adding the ability to not immediately print checks and to mark checks as printed without actually printing them.

- Fixed issue with the new Pay Bills form where Select All was not working properly.

- Updated the new Member Charge and Member Payment wizard so that the Cancel button now says Close.

- Updated the new Member Payment wizard to improve performance.

- Updated POS to restore the ability to print the Settle Ticket when doing a Member Charge All for tee times in POS.