



Clubessential Items Manual

2017 - Winter Edition

User Guide - Table of Contents

[Overview](#)

[Use Case\(s\)](#)

[Accessing the Tool](#)

[Item Rules](#)

[Standard Icons](#)

[Manage Item Groups](#)

[Manage Item Categories](#)

[Items Selection Tab](#)

[Area Tab](#)

[Override Tab](#)

[POS Button Style](#)

[POS Behavior](#)

[Print Configuration Tab](#)

[Manage Items](#)

[Manage Billing Items](#)

[Manage F&B Items](#)

[Point of Sale Option](#)

[Button Style](#)

[Print Configuration](#)



[Modifiers](#)

[Recipe](#)

[Manage Retail Items](#)

[Golf Rounds Setup](#)

[Inventory](#)

[Labels](#)

[Pictures](#)

[Point of Sale Screen](#)

[Button Style](#)

[Vouchers](#)

[Voucher Rules](#)

[Voucher Setup](#)

[Manage Item Combos](#)

[POS Behavior Tab](#)

[Manage Modifier Groups](#)

[Manage Price Scheduling](#)

[Common Questions and Concerns](#)

[Add Question #1?](#)

[Add Question #2+ \(as needed\)?](#)

[Best Practices](#)

Overview

Item configuration points transactions to the **General Ledger Account** for financials. All POS and Billing Items are linked to an **Item** such as: Scheduled Billings, Installment Billings, Store Credits, Gift Certificate, POS Transactions, etc.

In this guide you will learn how to setup **Item Groups**, **Item Categories**, and **Items**. Items can be used in various ways such as combos, vouchers, etc. This guide will teach the different usages of **items**.

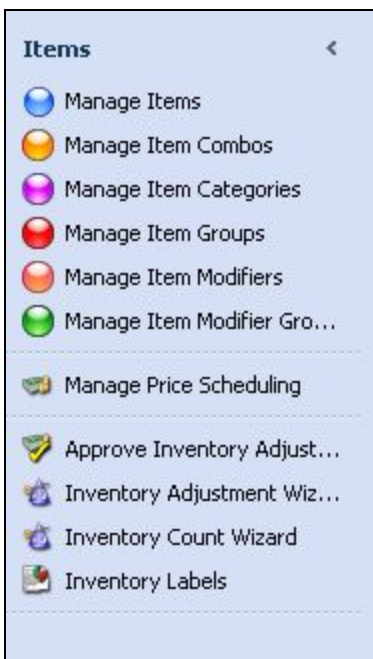
Use Case(s)

- A Club Admin needs to create **Items**, **Item Groups**, and/or **Item Categories** within CMA.

Accessing the Tool

The Items Module is located in the left hand navigation. See image to the right for detail.

When you select the **Items** module; the top left panel will list the Item Option menu(s) that we will cover in this guide. **Items** will open in the **Manage Items** tab.



Item Rules

The **Item Setup** consists of three tiers: **Items**, **Categories**, and **Groups**. All Items belong to a Category, all Categories belong to a Group.

Example of a **Tier**:

- Food (**Item Group**)
 - Entrée (**Item Category**)
 - Lobster Ravioli (**Item**)
 - 8oz Steak (**Item**)
 - Trout w/Crab Sauce (**Item**)

An Item can only belong to one **Category** and one **Group**. You can have unlimited number of **Items** in a **Category** and you can have unlimited number of **Categories** in a **Group**.

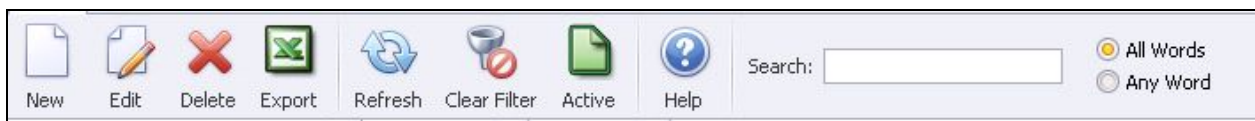
Please Note: The **Tax and Service Charge** percentages are determined by either the **Item Category** or **Item Group** (not the Item level).

You can enter the **GL Sales Account** on the **Item**, **Category**, or **Group** level.

Please Note:

- *Item overrides the category and group settings.*
- *The Category can override the Group settings (**only** if the **Override Group Settings** is checked).*
- *The Group settings will be used if there is no override on the Item or Category setting.*

Standard Icons



The toolbar above all grids list the **standard** icons:

New, Edit, Delete, Export to Excel, Refresh, Clear Filter Active/Inactive Items, Help (Navigates to Client Facing Knowledge Base), and the Search field.



On all maintenance screens the above toolbar lists the **standard** icons:

Save

Remains on the screen.

Save & New

Saves the record and clears the screen for a new record.

Save & Close

Saves and exits the maintenance screen.

Audit Logs

Shows date of last change, old/new values, and user who made the change.

Manage Item Groups

Select **Items**, then **Manage Item Groups**.

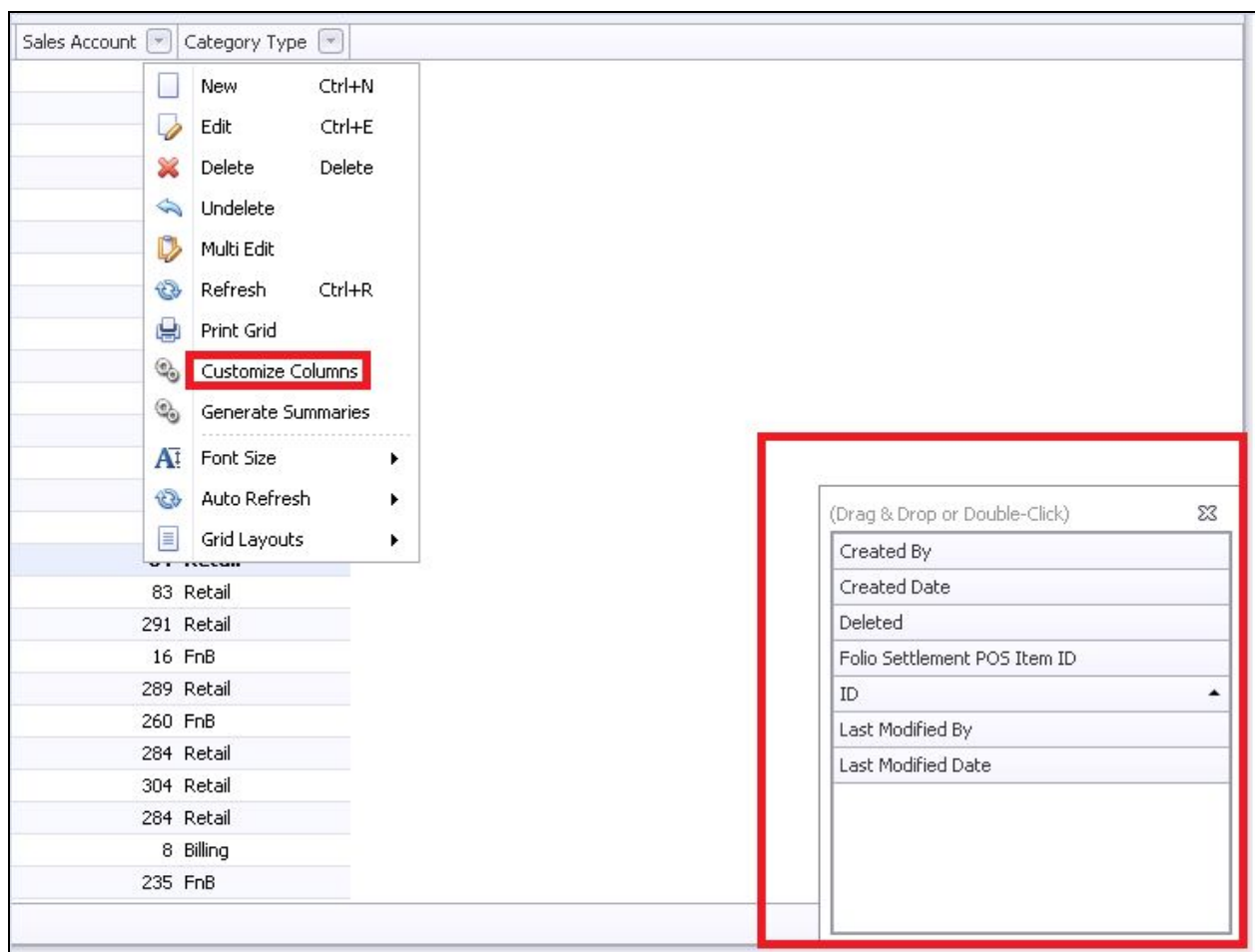


The Grid that displays will vary from user to user. For example, if the user is only allowed to see Retail items they will not see FNB or Billing Items.

To **customize** your **grid** to display different columns:

Right click anywhere on the grid and select **Customize Columns**. A list of Columns will appear and can be added to the grid by simply double clicking or dragging and dropping the column in question. The columns available will vary by module.

For more information on **grids**, please click [here](#) to navigate to Clubessential's Client Resource Center. Grids can be found under the **Interactive Reports Module**.



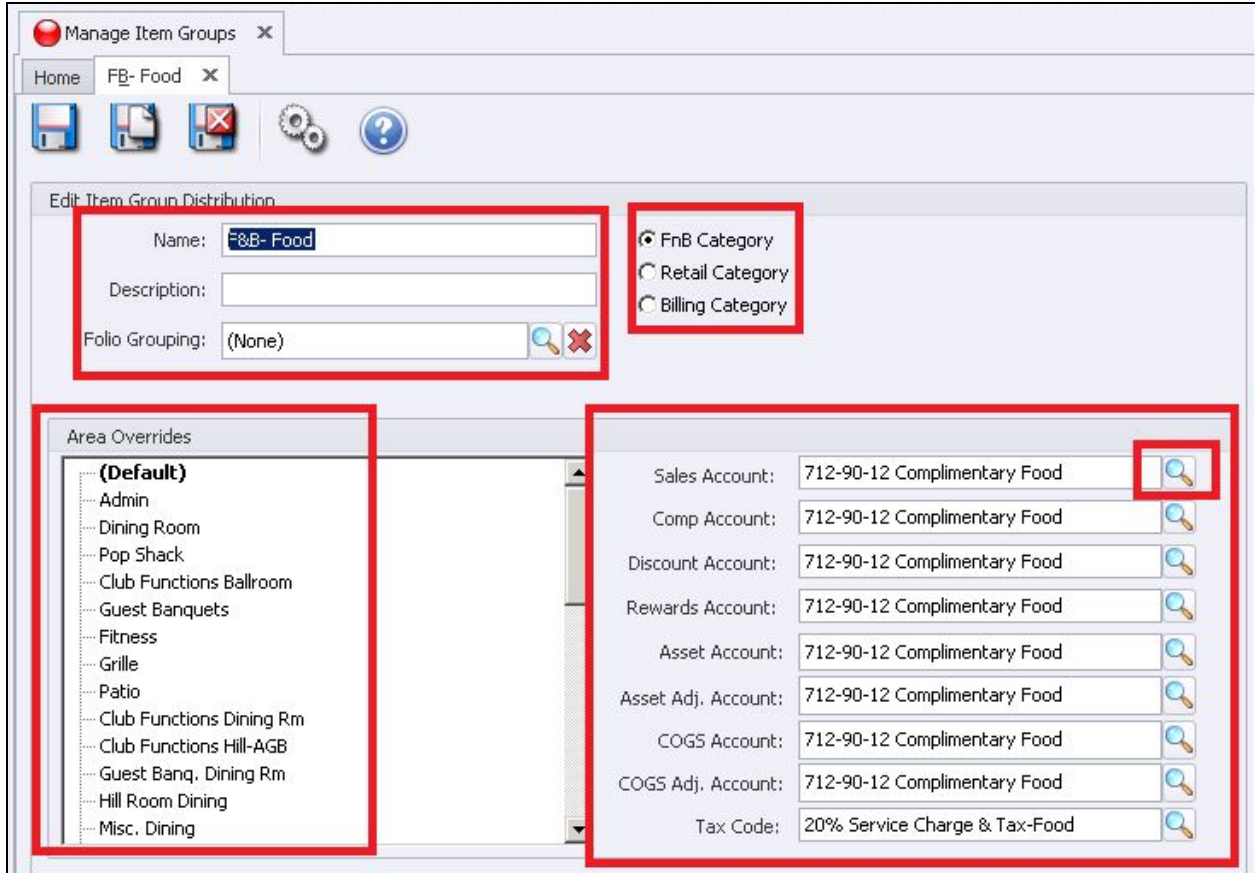
Click on the column **heading** to sort by any column or use the funnels to filter the information listed.

To **edit** an **Item Group**:

Highlight the **Item Group** and double-click or select the **Edit** icon on the toolbar.

To **add new** groups, click the **New** icon.

The **Item Group** screen will appear. See details below.



Name

Enter the name of the group.

Description

Additional description of the group; this is optional for internal viewing only.

Folio Grouping

Relates to Guest Room Items.

Select the **Group Category** that relates to the Items that will be associated with the Group

- Select **FnB Category** if the Group is for Food & Beverage POS or Banquet Items.
- Select **Retail Category** if the Group is for Retail POS Items.

- Select **Billing Category** if the Group is for Billing Items (these items will not be available in POS).

Area Overrides

Within **System**, then **Areas**:

Highlight the **Default Area** and enter the **Account information** to the right of the screen (required).

Please Note: Each Area can have different **Account allocations** by highlighting the **Area name** and entering the accounts.

Select the **Accounts** for General Ledger allocations:

Sales Account

Select the revenue account that will be credited when items are sold.

Comp Account

Select the account that will be debited for the amount of comps made at POS.

Discount Account

Select the account that will be debited for the amount of discounts made at POS.

Rewards Account

The field is related to a future enhancement and currently not used; you can use any account but it is required before you can save and exit.

Asset Account

For **Retail Items only**: select the account that should be debited when inventory is received and credited when inventory is sold.

Asset Adjustment Account

For **Retail Items only**: Select the account that will be used when making Inventory Adjustments (can be a debit or credit based on the adjustment).

COGS Account (Cost of Goods Sold)

For Retail Items only: select the account that should be debited when inventory is sold (that offsets the credit to the inventory asset account).



COGS Adjustment Account

For Retail Items only: select the account that will be used when making Inventory Adjustments (can be a debit or credit based on the adjustment).

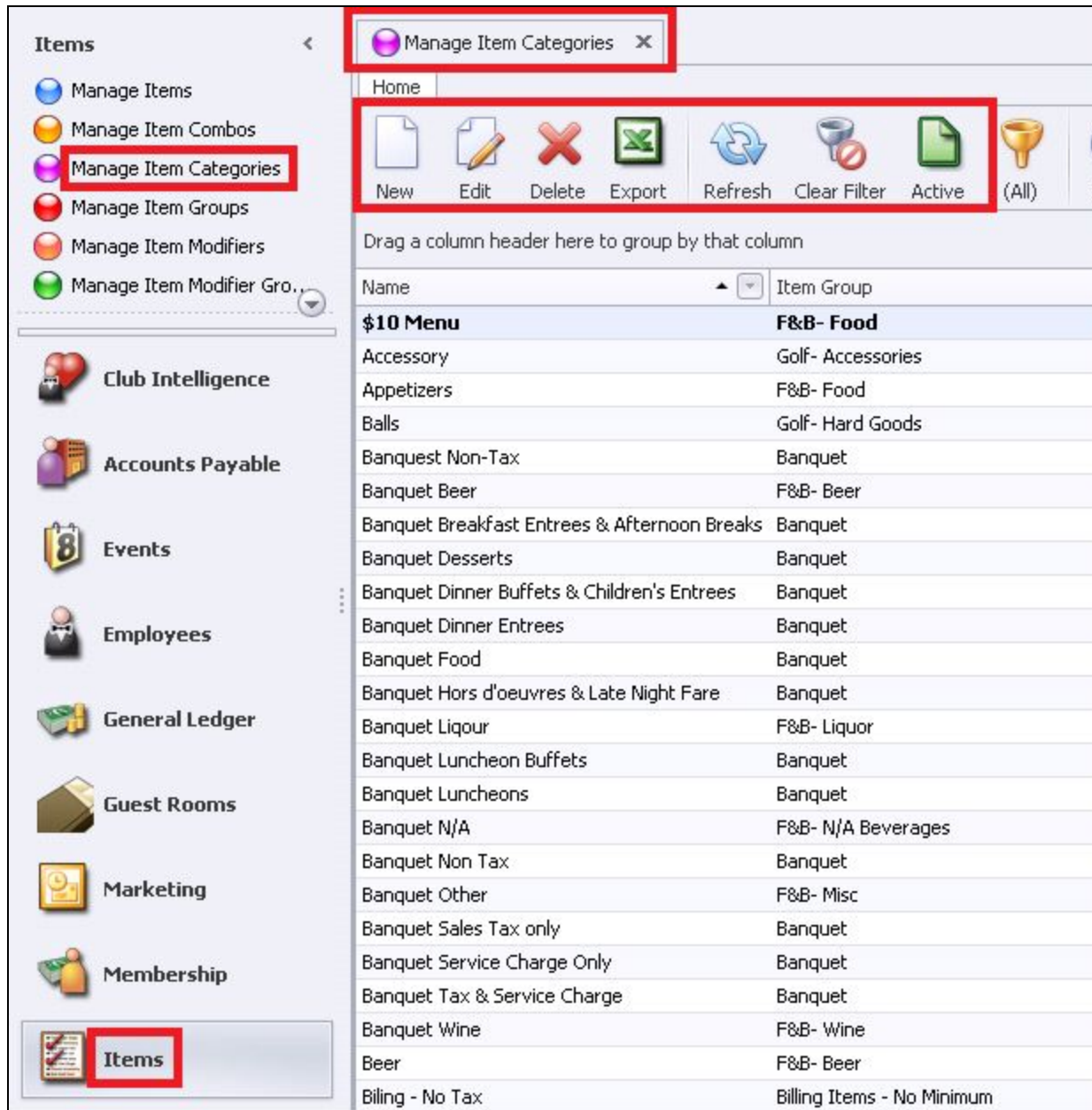
Tax Code

The tax code selected will determine the amount of tax and service charge that will be added to items when sold. (You may refer to the [Tax and Service Charge Setup Manual](#) for more information).

When finished select **Save & Close**.

Manage Item Categories

Select **Items** then **Manage Item Categories**.



The screenshot shows the 'Manage Item Categories' window. The left sidebar contains several menu items, with 'Items' at the bottom highlighted. The main content area features a toolbar with icons for New, Edit, Delete, Export, Refresh, Clear Filter, Active, and (All). Below the toolbar is a table with columns 'Name' and 'Item Group'.

Name	Item Group
\$10 Menu	F&B- Food
Accessory	Golf- Accessories
Appetizers	F&B- Food
Balls	Golf- Hard Goods
Banquest Non-Tax	Banquet
Banquet Beer	F&B- Beer
Banquet Breakfast Entrees & Afternoon Breaks	Banquet
Banquet Desserts	Banquet
Banquet Dinner Buffets & Children's Entrees	Banquet
Banquet Dinner Entrees	Banquet
Banquet Food	Banquet
Banquet Hors d'oeuvres & Late Night Fare	Banquet
Banquet Liquor	F&B- Liquor
Banquet Luncheon Buffets	Banquet
Banquet Luncheons	Banquet
Banquet N/A	F&B- N/A Beverages
Banquet Non Tax	Banquet
Banquet Other	F&B- Misc
Banquet Sales Tax only	Banquet
Banquet Service Charge Only	Banquet
Banquet Tax & Service Charge	Banquet
Banquet Wine	F&B- Wine
Beer	F&B- Beer
Billing - No Tax	Billing Items - No Minimum

Please Note:

- The Grid will vary from user to user. Example: if the user is only allowed to see Retail items they will not see FNB or Billing Categories.
- You can customize your **grid** to display different columns (Please click [Here](#) if you need a refresher on how to customize **Grids**).
- You can click on the column **heading** to sort by any column or use the **funnels** to filter the information listed.

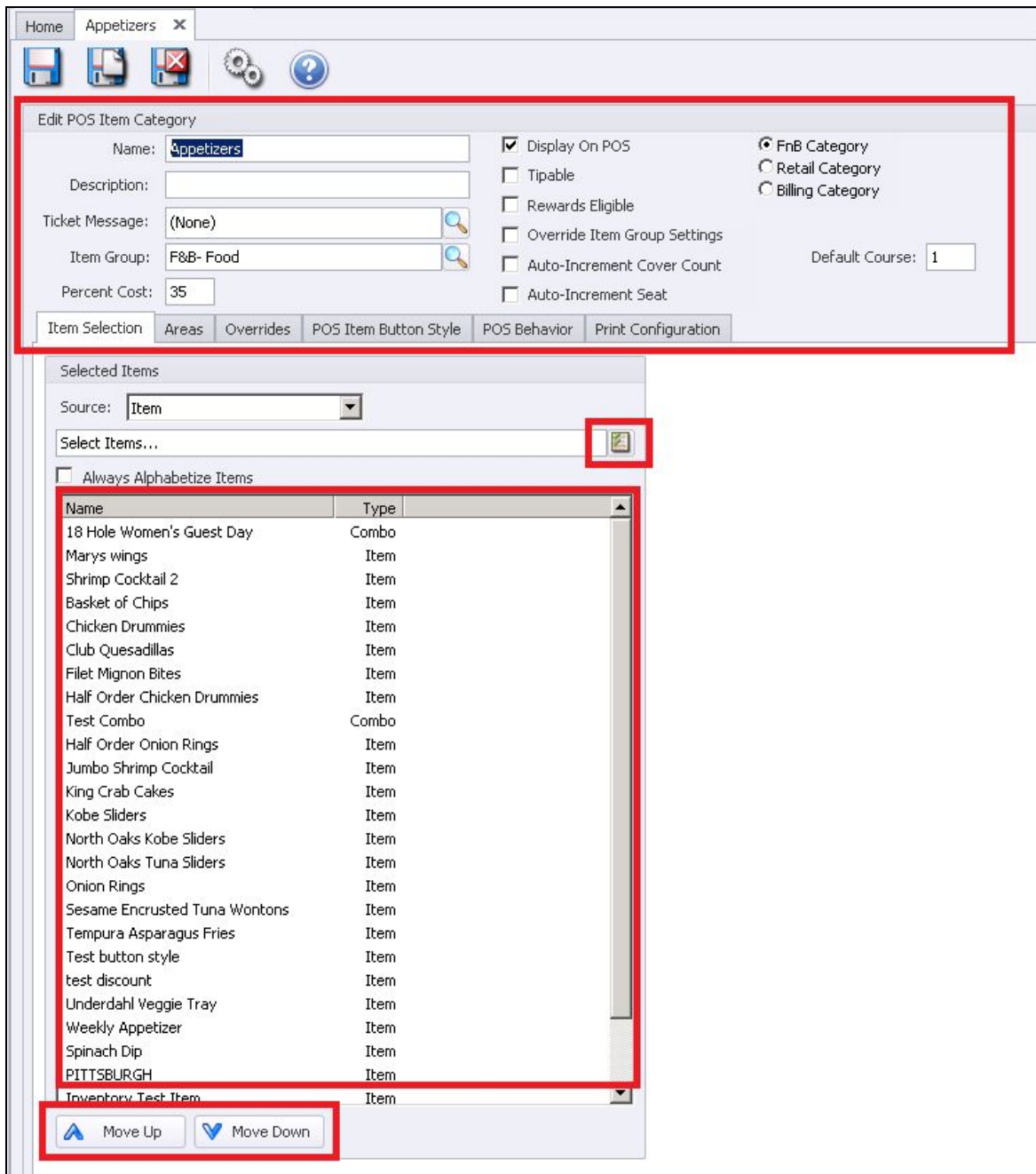
- Above the grid is a toolbar listing the standard icons:
 - New, Edit, Delete, Export to Excel, Refresh, Clear Filter, Active/Inactive Items, and Help.

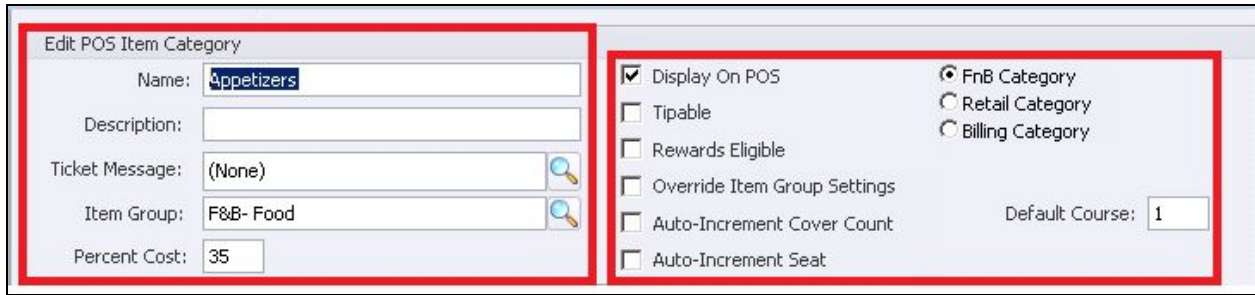
To **edit** an **Item Category**, highlight the **Item Category** and double click or select the **Edit** Icon on the toolbar.

To add a **new** Category:

Click the **New** icon. The Item Category screen will appear. At the top of the screen are the standard icons: Save, Save & New, Save & Close, and the Audit Log.

In the middle of the screen are various **Tabs**; we will cover each Tab's function in this section.





Name

This field is required. Enter the name of the Category.

Description

Additional description of the Category; this is optional for internal viewing only.

Ticket Message

This is optional, select a ticket message that will print on POS receipts each time this item is charged.

For example, if your club is having an upcoming scotch tasting, you might attach a Ticket Message to a category that includes your scotch items that provides details of the event.

Please Note: *The same type of settings can also be set at the Item level.*

Item Group

This field is required. Click on the search icon to see available Item Groups. If you need to setup a new Item Group click on the Quick Add button (click [here](#) for more on Manage Item Group).

Percent Cost

You can add a theoretical cost percentage for this category. This cost percent will be applied to all items associated with this category and report on the **Interactive Reports > Inventory > Gross Margin Report**.

Please Note: *The Item level allows a cost dollar; if you have a percentage on the category level the Item cost dollar will override the category cost percent.*

Display at POS

Check this box if the items in this category are to displayed at Point-of-Sale. This is a default setting and can be overridden on the Item level.

Tipable

Check this box if items associated with this Category can have a tip or service charge applied. This is a default setting and can be overridden on the Item level.

Rewards Eligible

This feature is a future enhancement and is not currently available.

Override Item Group Settings

If this box is checked the system will use the Category settings and ignore the Group settings. The **Override Tab** will be activated and required if this field is checked.

Auto-Increment Cover Count

Applies to F&B POS Only. When an item in this category is sold at POS it will automatically increase the cover count by one. This only applies to F&B Areas that track covers. This is a default setting and can be overridden on the Item level.

Auto-Increment Seat

Applies to F&B POS Only. When an item in this category is sold at POS it will automatically increment the seat number. This only applies to F&B Area that are setup for Seat Position. This is a default setting and can be overridden on the Item level.

Category

Select the Category Type that relates to the Items associated with this Category.

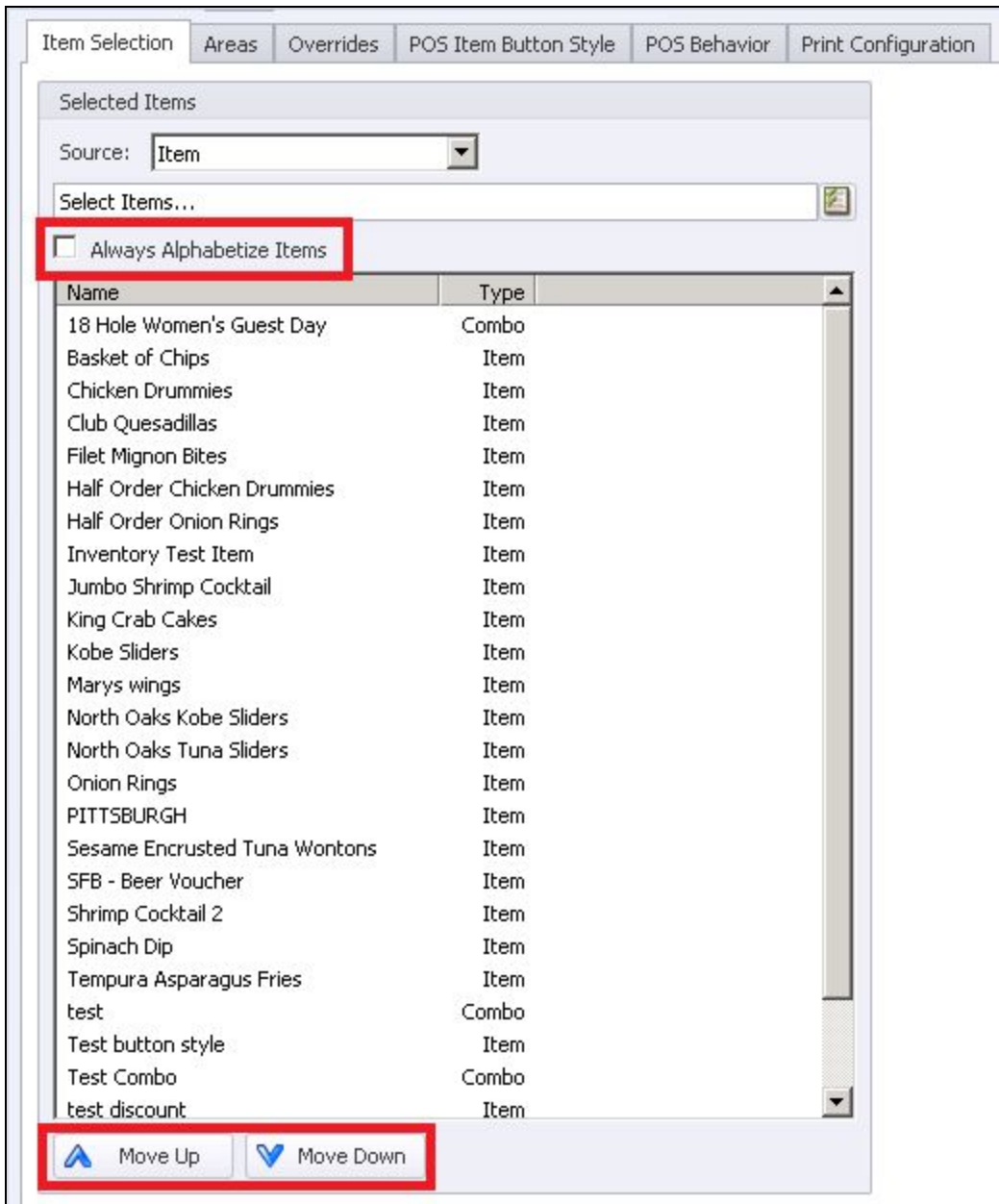
- Select **FnB Category** if the Group is for Food & Beverage POS Items and Banquet
- Select **Retail Category** if the Group is for Retail POS Items
- Select **Billing Category** if the Group is for Billing Items such as Minimums, Dues, Scheduled Billings, etc...(items in this category will not be seen at POS).

Default Course

Applies to **F&B POS Only**. If you have POS Areas in your club that use coursing it is recommended that you set the default course for the food Categories being sent to the kitchen. The Category level is only the default and can be overridden on the Item level and overridden at POS.

Items Selection Tab

The **Selected Items** box will list all Items setup for this Category. This section gives you the ability to organize the items how you want them to appear in the POS button.



Move Up/Down Arrows

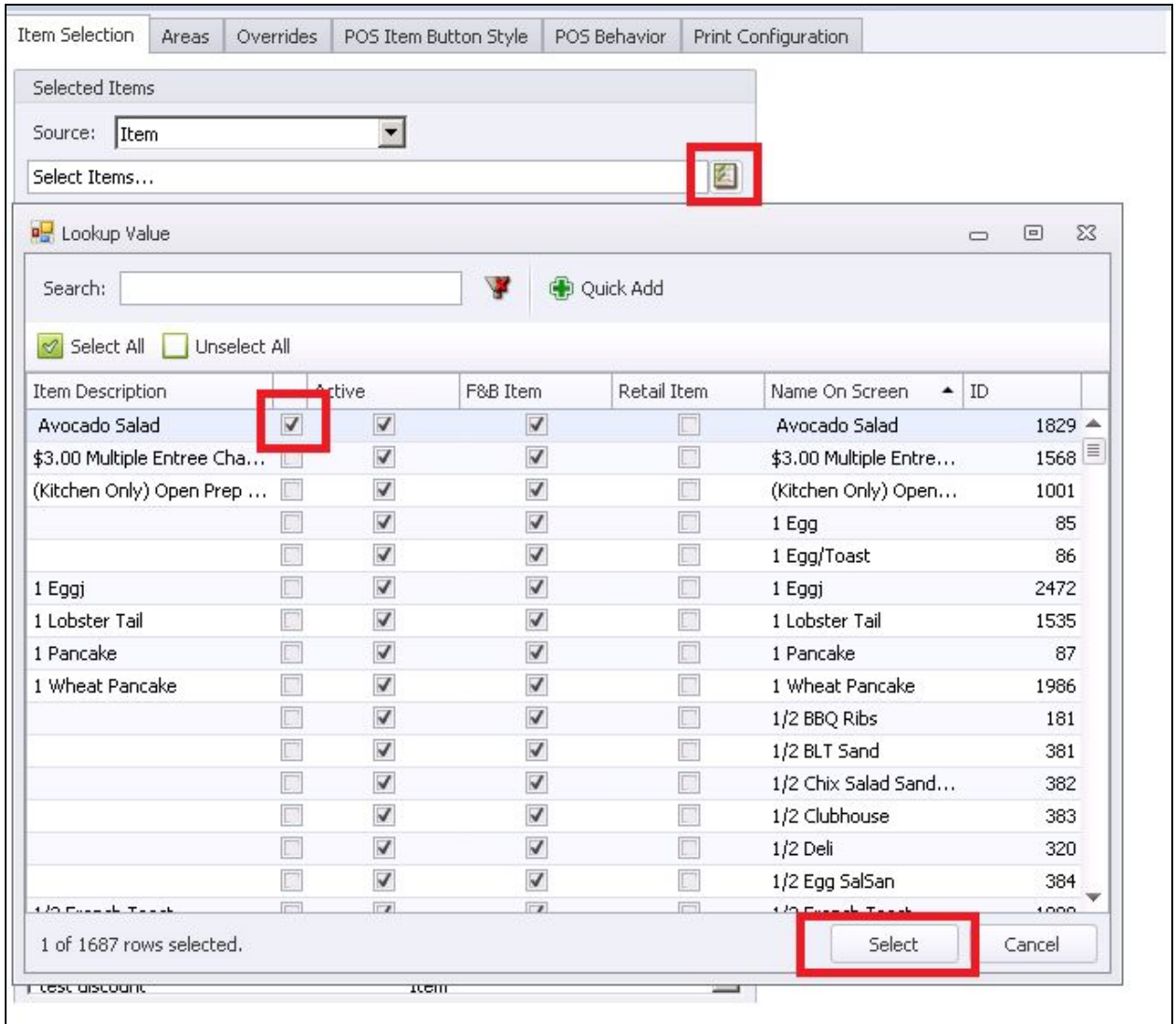
Highlight an item and click the Up or Down Arrow to move the item one line at a time.

Always Alphabetize

Check the **Always Alphabetize** flag to list alphabetically A to Z. If checked, the move up and move down feature will be removed.

Select Items Lookup

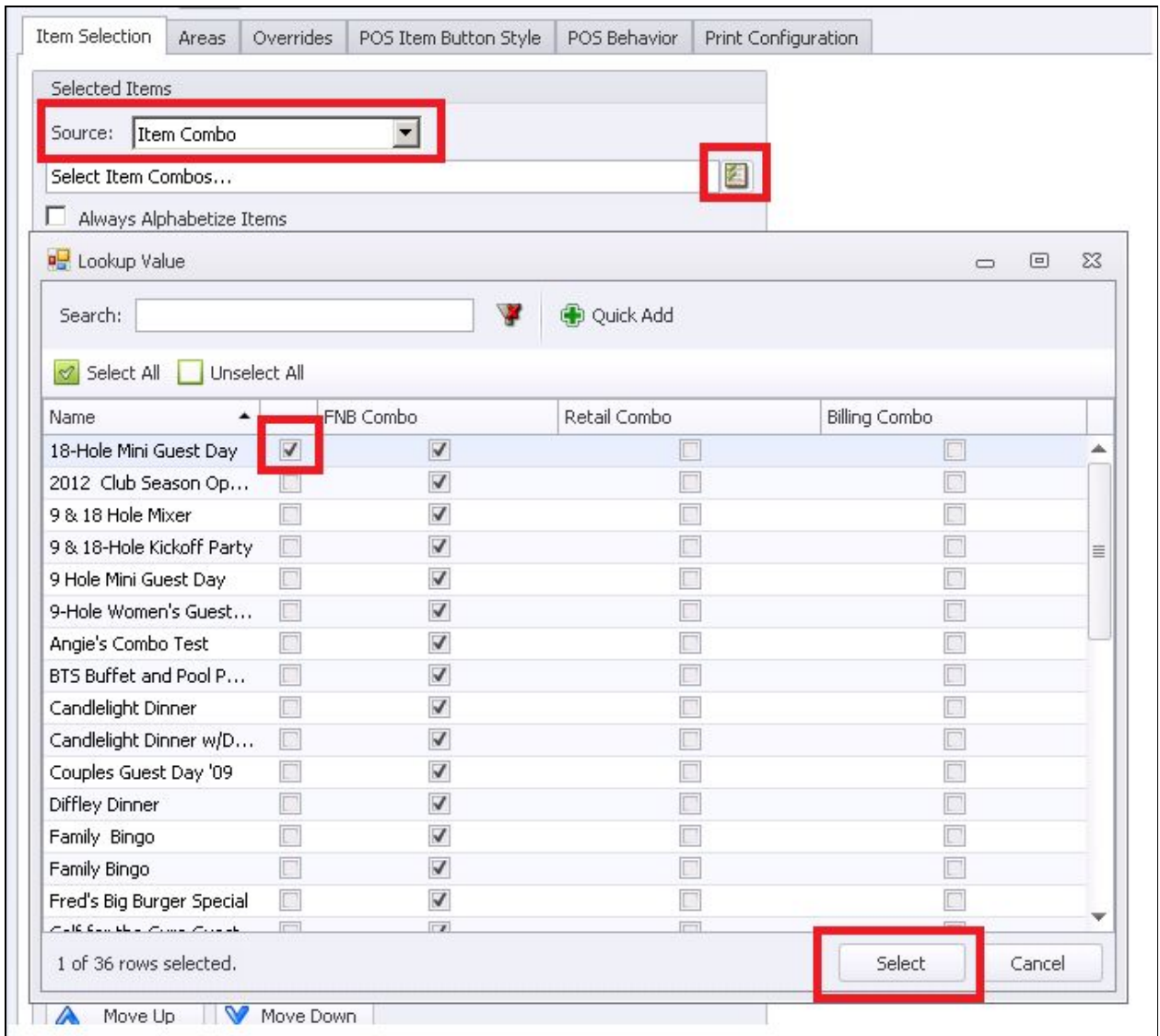
This will list all items in the system from all categories. You can move an item from another category to the displayed category by clicking the item to select, and then clicking **Select** on the bottom of the Lookup value.



Please Note: Another way to change the Item's Category: Go to the Manage Items module and change within the item itself.

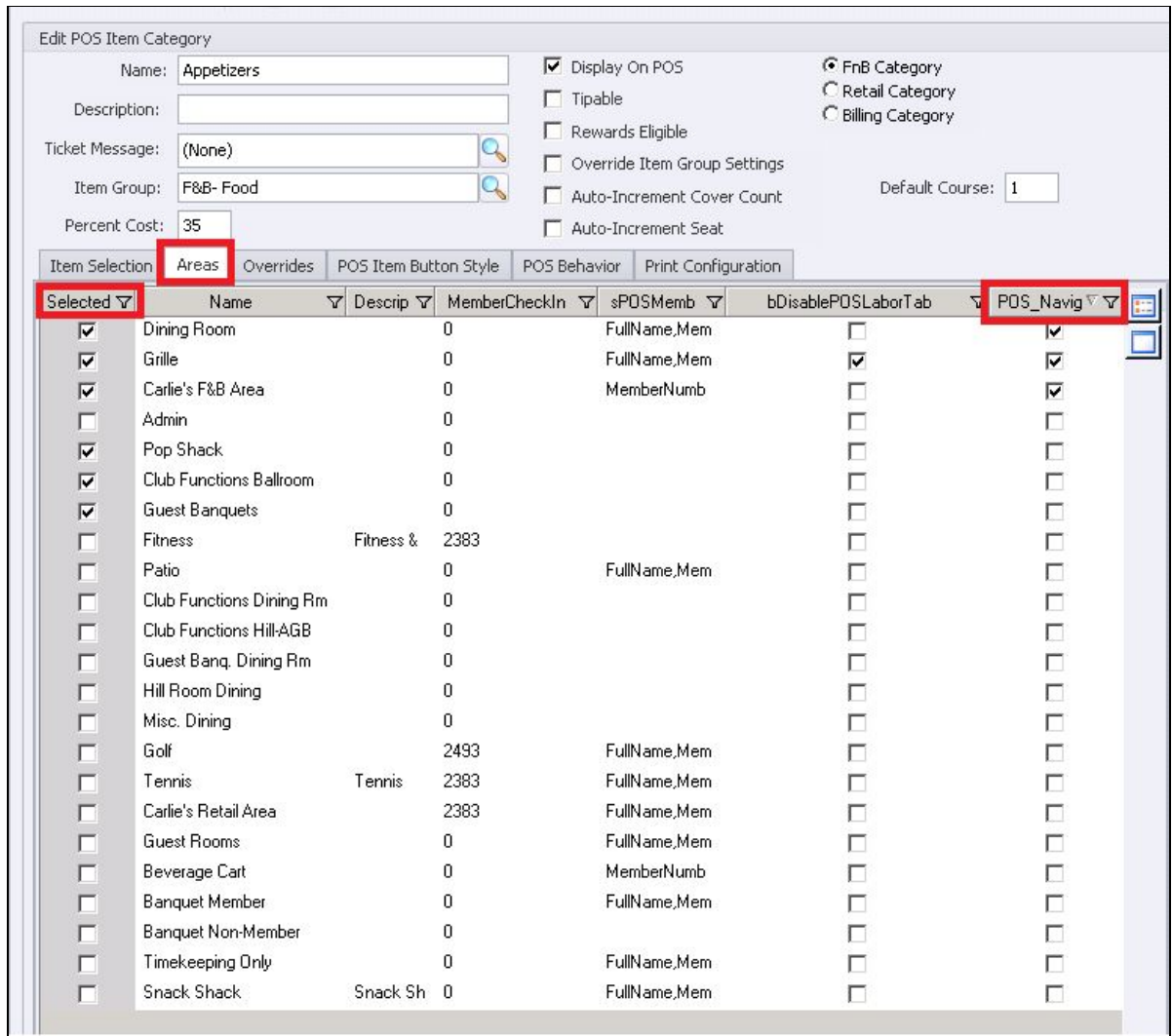
Available Item Combos

To display a list of combos in the system from all categories, change the **Source** to **Item Combo** and select the **Item Lookup**.



Area Tab

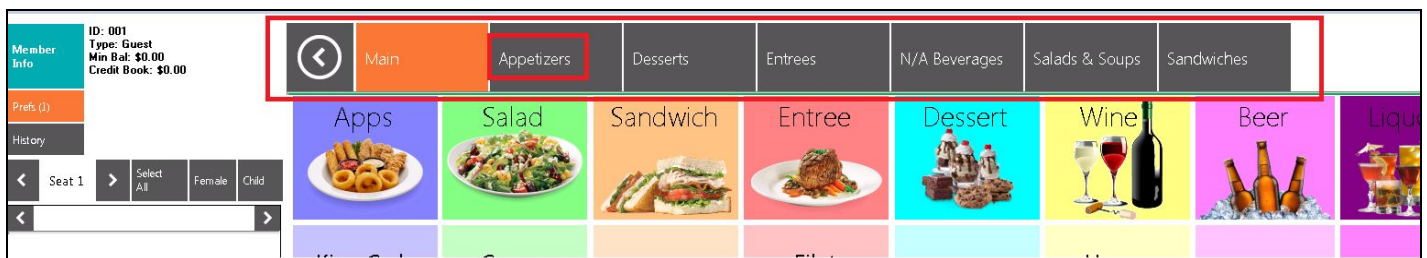
Select the **Areas** in which the items in this Category are allowed to be sold.



If the **Area** is not checked, the items in this category will **not** be seen at POS.

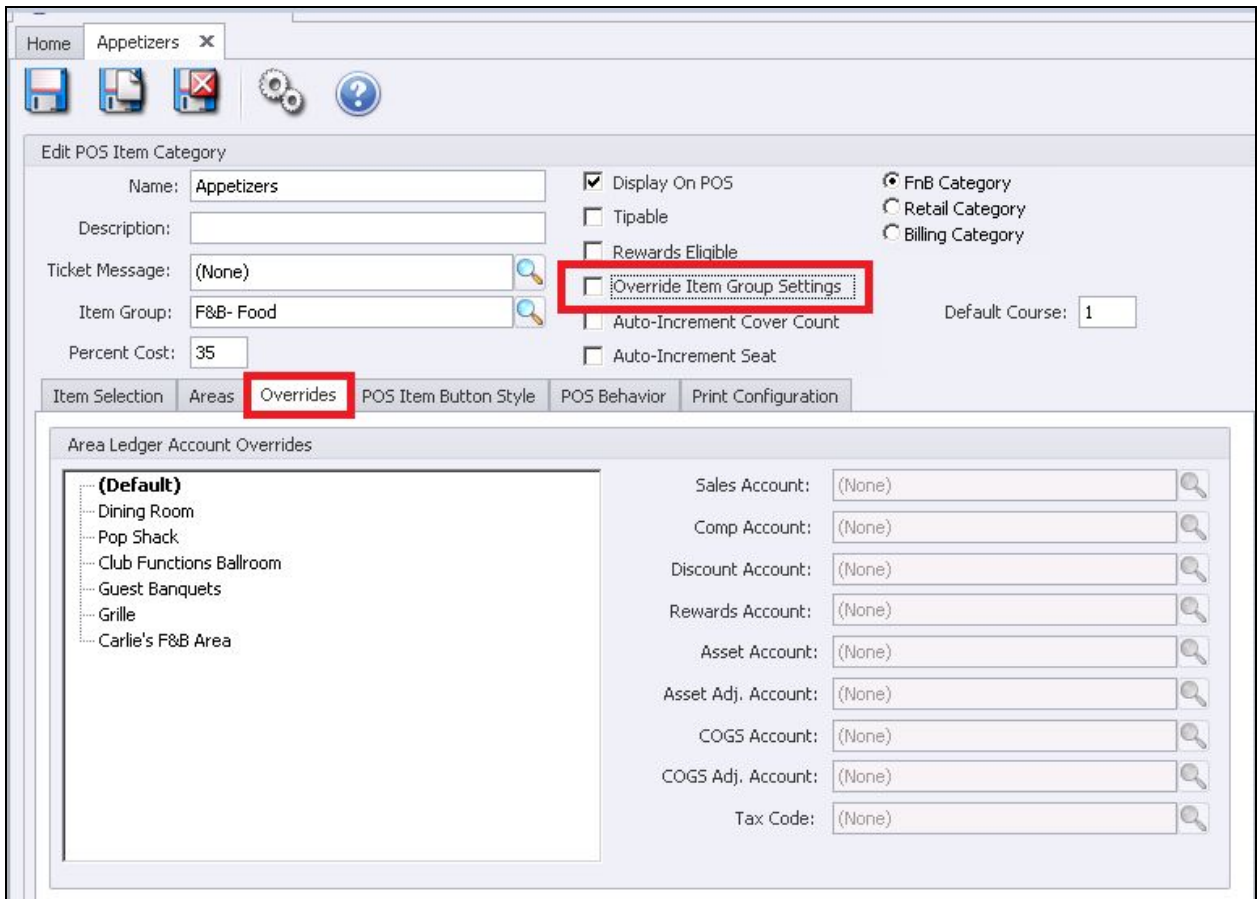
Employee must be given security rights to each Area; if they do not have permissions they will not see the Area at POS, on reports, and in searches.

- The two buttons to the far right of screen: top button is **Select All** the bottom button is **Unselect All**.
- The last column is called **POS_Navigation**; if you put a check mark for the **Area** it will create buttons at the top of the POS ordering screen for quick selection (see below POS screenshot).



Override Tab

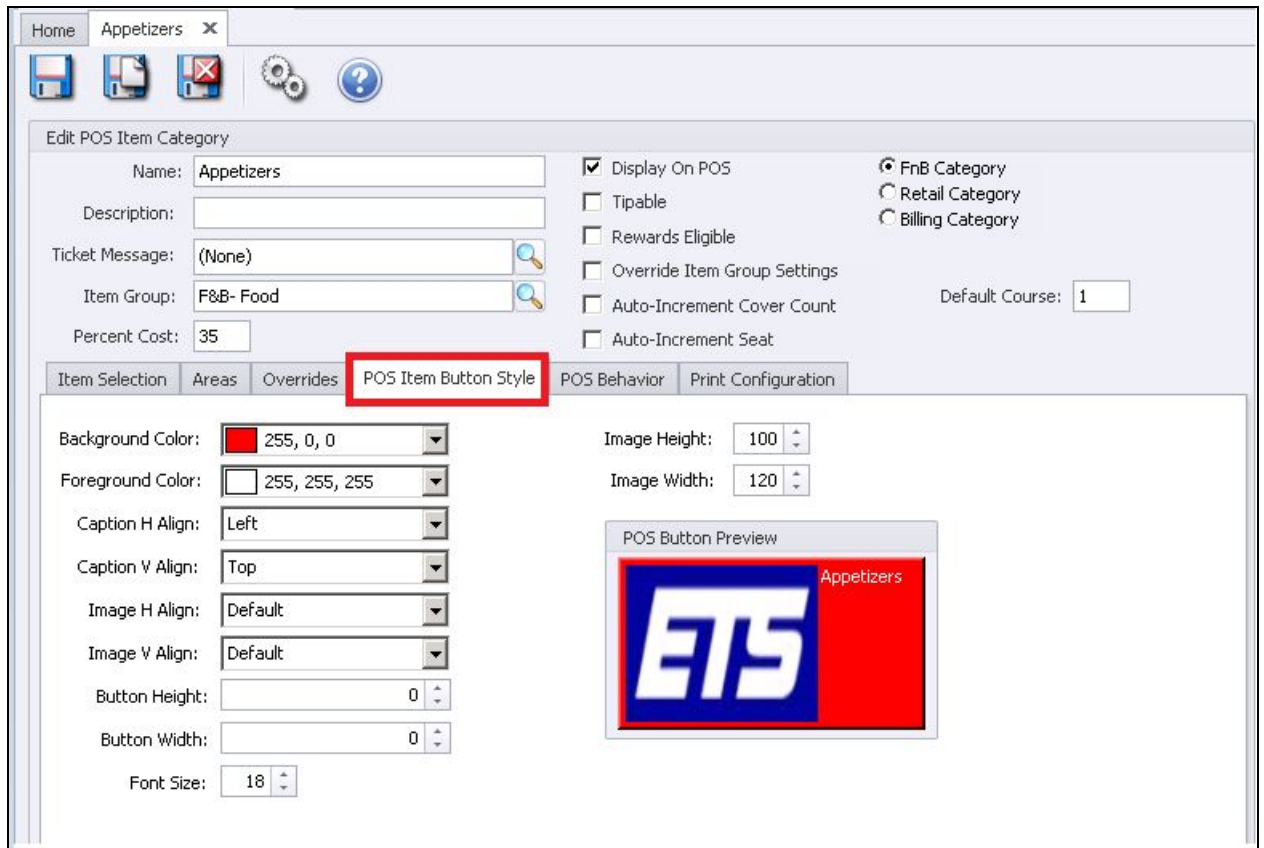
The **Override Tab** is only available if **Override Item Group Settings** is checked. When this field is checked, the Item Group settings will be ignored and the Category settings will override the Group settings.



Please Note: If the Accounts are grayed out like the screenshot above the **Override Item Group Settings** is **not** checked.

POS Button Style

POS Button Style allows for the change of the button size or font size.



Button Image – Upload an image to display on the button instead of text. You cannot see the button but if you hold your mouse at the end of the line or just click the end of the line you can browse to the image file.

Background Color

Click the down arrow and select the color for the background.

Foreground Color

Click the down arrow and select the color for the text.

Caption H Align

Click the down arrow and select the horizontal alignment of the text.

Caption V Align

Click the down arrow and select the vertical alignment of the text.

Image H Align

Click the down arrow and select the horizontal alignment of the image.

Image V Align

Click the down arrow and select the vertical alignment of the image.

Font Size

Enter the font you want the text size to be. This is for the button text in POS for the items associated with this category. You will not see the font change in the preview box since this is pertaining to the size of the Items not the Category text.

Image Height

Change the image height; 100 pixels is a good starting point.

Image Width

Change the image height; 100 pixels is a good starting point.

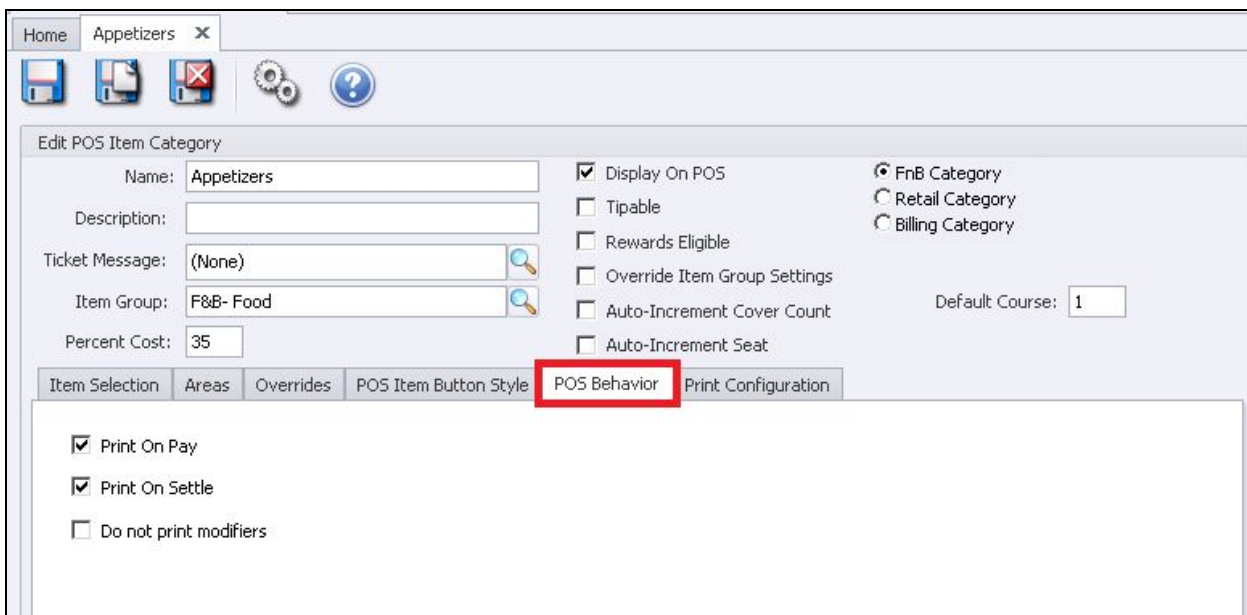
POS Button Preview

This box will give you a preview of what the alignment and colors.

Please Note:

- All fields related to Color and Text are default settings for the Item buttons associated with the category. For example, I might have a POS button on my screen group design that is set to list all the items that belong to the Appetizer Category. The system will look at the button style settings and create buttons for the items based on these settings.
- All the fields related to the Image pertain to the Category.
- The category settings are defaults and can be overwritten on an Item level.

POS Behavior



Print on Pay – If checked, Items in this Item Category will print on Pay Receipts. A **Pay Receipt** is the receipt the server presents to a member for signature (or payment method and additional gratuities to be added).

Print on Settle

If checked, Items in this Item Category will print on Settle Receipts. A **Settle Receipt** is the Receipt that is printed after the sale is tendered to Member Charge, Cash, etc. It will print the final total with additional tip and payment method.

Do not print modifiers

If this field is **checked** and the modifier has a price, the price will add into the base price and the modifier **WILL NOT** print on the member receipt. **Example:** if a pizza is 10 and three additional items were added at 1 dollar each the check will show 13.00 pizza total. If the field is **unchecked** the modifiers will be listed individually on the member receipt.

Please Note:

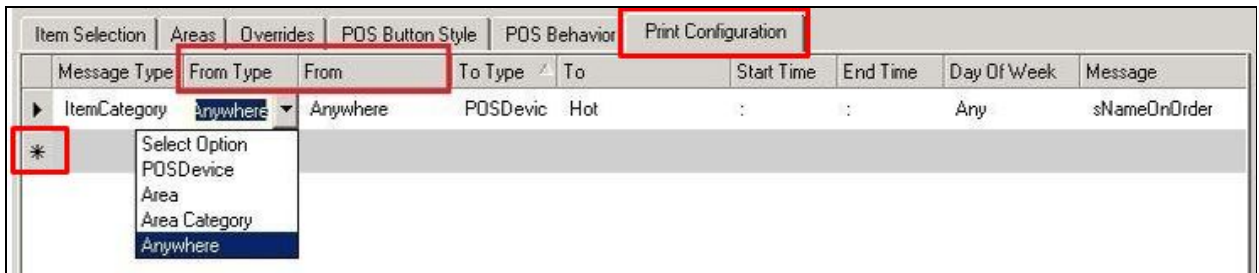
- If **Print on Pay** and **Print on Settle** are not checked the Items will not be listed on the receipts. The only time a club should choose not to print an item on a receipt is if it is a zero priced item. **Example:** The club might want to track Member Green Fees or towels that are not charged; they will ring up the item at POS for reporting purposes but do not want it on the member receipt.
- Do not print modifiers is usually unchecked for food but is checked for Liquor. **Example:** if there are additional charges for food add-ons most clubs want to show that on the receipt. However if there are extra charges for Liquor on the rocks or up most clubs don't want that listed on the receipt and prefer to add the extra charge into the base price.

Print Configuration Tab

Please Note: *This tab applies to **F&B Item Categories Only** and does not apply to Retail or Billing Categories.*

The **Print Configuration Tab** tells the system which Prep-Printer the items within this category are sent (Hot, Cold, Bar, etc.). The F&B Items will inherit the print configuration

but can be changed on an item level.



Message Type is always set to **ItemCategory**.

The **From Type** works in conjunction with the **From field**. These fields are used if the club has more than one kitchen or bar. Click the **down arrow** to get a list of options.

From Type Options:

POSDevice

If the item is to print to a specific prep printer (kitchen/bar) based on the Terminal location,click the down arrow and choose **From a Terminal Device** (the system will list all devices but you must select a **Terminal device not a Printer** device).

Example: The club has an upstairs and downstairs kitchen, if an item is sent from a POS terminal upstairs it will always print to the upstairs kitchen no matter what Area was selected

Area

Is used if the item is to print to a specific prep printer (kitchen/bar) based on the **Area** the ticket was open. **From** click the down arrow and choose the **Area**.

Example: you have an upstairs and downstairs kitchen, if an item is sent from the Dining Room it always prints to the downstairs kitchen even if it was sent from an upstairs terminal.

Please Note: If **Area** is selected ALL Areas that send orders must be setup > to Add another Area configuration click the *asterisk; this will create another line.

Area Category

This option works the same as Areas except it pulls from the **Area Category** instead of individual Areas.

Anywhere

If there is only one kitchen or bar select this option.

From Column Options:

Please Note: *The list will vary from club to club.*

- If **POSDevice** was selected the list will populate all devices (both printer and terminal).
- If **Area** was selected the list will populate all the Areas setup in your system. You must setup and configure each Area that prints orders to a remote printer.
- If **Area Category** was selected the list will populate all the Area Categories set up in your system.
- **Anywhere** will only give the option Anywhere.

To Type Options:

The **To Type** works in conjunction with the **To field**.

Item Selection		Areas	Overrides	POS Button Style	POS Behavior	Print Configuration			
Message Type	From Type	From	To Type	To	Start Time	End Time	Day Of Week	Message	
ItemCategory	Anywhere		POSDevice	Hot	:	:	Any	sNameOnOrder	
*			<ul style="list-style-type: none"> Select Option POSDevice POSDevice Group 						

To Type:

- **POSDevice** – Devices are both **terminals** and **printers**.
- **POSDevice Group** – this is the preferred setup; using groups makes it easy to reroute orders to a different printer if a printer dies or orders need to reroute to a different kitchen or bar.


To:

- If **POSDevice** was selected the system will list all Terminals and Printers setup in your system.
- If **POSDevice Group** was selected the system will list all device groups set up in your system.

Start Time & End Time


Used when an Area of the club uses more than one kitchen or bar in one day.

Example: The clubs orders print to a grill kitchen from 8am to 3pm and then from 3:01pm to close the orders print to the Main Kitchen printer.

Print Configuration									
Message Type	From Type	From	To Type	To	Start Time	End Time	Day Of Week	Message	
	ItemCategory	Anywhere	POSDevic	Hot	:	:	Any	sNameOnOrder	
*									


Day Of Week

Used only if certain days Areas of the club use more than one kitchen or bar, if this applies to more than one day each day will need to be setup separately.

Print Configuration									
Message Type	From Type	From	To Type	To	Start Time	End Time	Day Of Week	Message	
	ItemCategory	Anywhere	POSDevic	Hot	:	:	Any	sNameOnOrder	
*									
							<ul style="list-style-type: none"> Sunday Monday Tuesday Wednesday Thursday Friday Saturday Any 		

Message

The Category setup should always be **sNameOnOrder**: this tells the system to default the send name to what the item description is. The Send Name can be changed on the item level.

Print Configuration									
Message Type	From Type	From	To Type	To	Start Time	End Time	Day Of Week	Message	
	ItemCategory	Anywhere	POSDevic	Hot	:	:	Any	sNameOnOrder	
*									

Please Note:

- **Do not** leave the **Message** field blank or **None**; if blank or None **no item description** will print on the prep-printers unless you manually enter the name on the item level.
- If you accidentally clicked None and want to fix; highlight the line by clicking the pencil on the left of the line and hit your delete key on the keyboard.

Click **Save & Close** when done.

The **print configuration** is setup by the Clubessential Trainer during implementation.

Manage Items

In **CMA**, select **Items** then select **Manage Items**.



The screenshot shows the CMA software interface. On the left is a navigation menu with 'Items' highlighted in a red box. Below 'Items' are various management options like 'Manage Item Combos', 'Manage Item Categories', etc. The main window is titled 'Manage Items' and contains a toolbar with icons for New, Edit, Delete, Export, Refresh, Clear Filter, Active, and (All). Below the toolbar is a table of items. The table has columns for 'Name On Screen', 'Item Description', 'Item Price', and 'Bill'. The first row is highlighted in pink and shows 'Aloe Up Lip Ice' with a price of \$4.00. Other items include 'Footjoy Womens Colored', 'Aloe Up Sun Tan Lotion Small', 'Titleist Solo w/ Logo', etc.

Name On Screen	Item Description	Item Price	Bill
Aloe Up Lip Ice		\$4.00	
Footjoy Womens Colored	Footjoy Womens Colored	\$8.00	
Aloe Up Sun Tan Lotion Small	Aloe Up Sun Tan Lotion Small	\$5.00	
Titleist Solo w/ Logo	Titleist Solo w/ Logo	\$7.75	
Titleist Tour NXT w/ Logo	Titleist Tour NXT w/ Logo	\$10.50	
King Crab Cakes	King Crab Cakes	\$15.95	
Wine Dinner Bottles	Wine Dinner Bottles	\$0.00	
Taylor Made Burner Sleeve	Taylor Made Burner Sleeve	\$7.50	
Srixon Z Star Sleeve	Srixon Z Star Sleeve	\$12.50	
Tica Leather	Tica Leather	\$0.00	
London Broil	London Broil	\$10.00	
Food Minimum	Food Minimum	\$0.00	
Finance Charge	Finance Charge	\$0.00	
Corporate Golf Single Dues	Corporate Golf Single Dues	\$1,200.00	
Corporate Golf Family Dues	Corporate Golf Family Dues	\$0.00	
Reciprocal Club Fee	Reciprocal Club Fee	\$0.00	
Debt Service	Debt Service	\$0.00	
Associate Dues	Associate Dues	\$0.00	
Surviving Spouse Dues	Surviving Spouse Dues	\$0.00	
Prepaid Dues No Tax	Prepaid Dues No Tax	\$0.00	
Social Dues	Social Dues	\$0.00	
Senior Dues	Senior Dues	\$0.00	
Intermediate Dues	Intermediate Dues	\$0.00	
Mill River	Mill River	\$0.00	
Locker Rental	Locker Rental	\$0.00	
Range Plan	Range Plan	\$0.00	
Club Storage	Club Storage	\$0.00	
Bread Basket	Bread Basket	\$1.25	
Alaskan btl	Alaskan btl	\$4.00	
Becks NA	Becks NA	\$4.00	
Becks	Becks	\$4.50	

Please Note:

- Grids are user defined; the available custom fields are determined by your employee security rights.
- Contact your administrator to inquire about your employee security settings if you have questions.
- Clubessential employees are not allowed to change employee security rights; only a club administrator is allowed to make these changes
- You can customize your grid to display different columns and use the funnels to filter information

There are three types of **Items**, each have different requirements and capabilities. In the following sections we will cover each separately.

- **Billing Items:** In this section, we will cover setting up items to be used for billings such as Dues, Initiation Fees, minimums, etc. These items are not available at POS.
- **FnB Items:** In this section, we will cover the fields that apply to the Food and Beverage Point of Sale.
- **Retail Items:** In this section, we will cover the fields that apply to the Retail Point of Sale such as Golf, Tennis, Spa.

Manage Billing Items

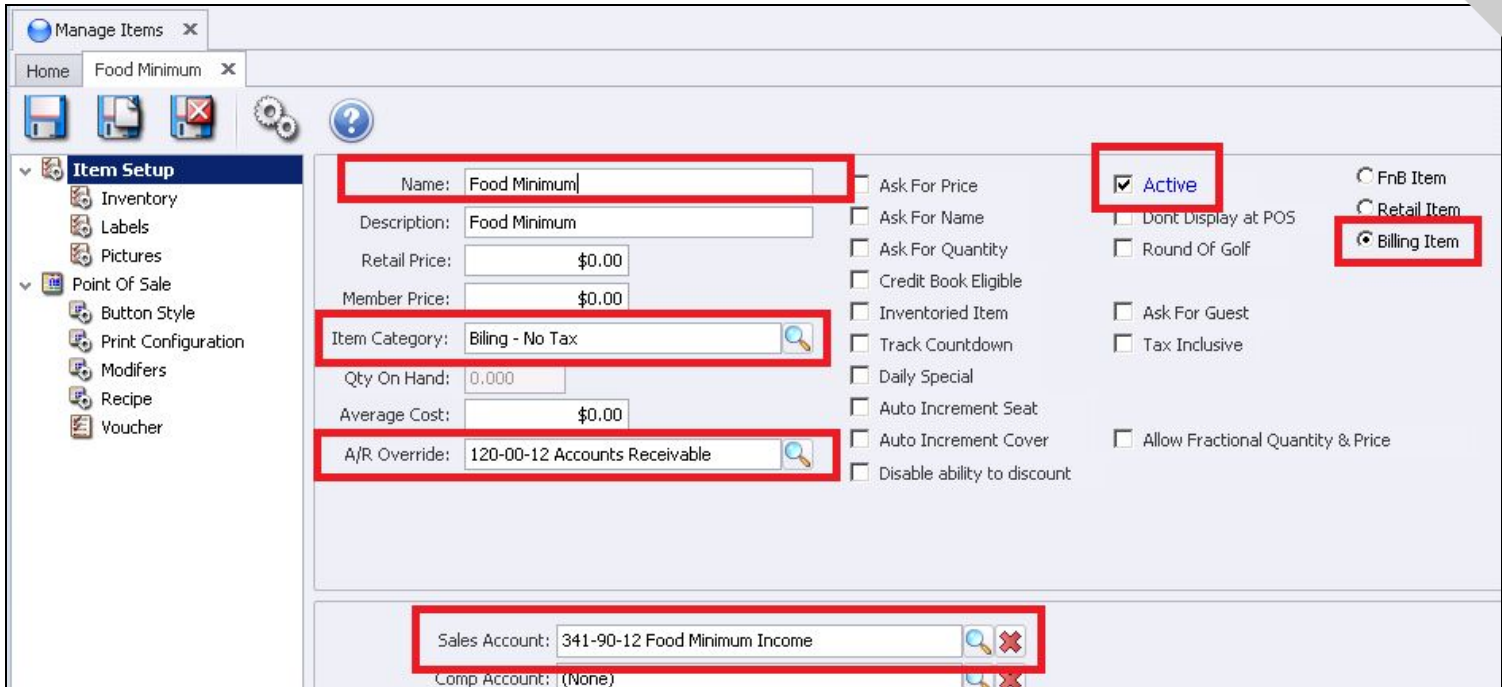
Edit an Item

Highlight the Item and double-click **or** select the **Edit** icon on the toolbar.

Create a New Item

Click the **New Icon**.

The **Item Maintenance** screen will appear, details below.



The screenshot shows the 'Manage Items' window for the 'Food Minimum' item. The 'Item Setup' section is active. The following fields are highlighted with red boxes:

- Name:** Food Minimum
- Active:** Active
- Billing Item:** Billing Item
- Item Category:** Billing - No Tax
- A/R Override:** 120-00-12 Accounts Receivable
- Sales Account:** 341-90-12 Food Minimum Income

Billing Item

Must be checked.

Active

The system defaults to Active.

Name

Give the item a Name.

Description

This field is not used for billings.

Price

Typically there is no price on the item level, the prices are set up in the billing setup. The item is mainly used to direct the transactions to the correct Debit or Credit Ledgers. If this item will not be used as a recurring billing item and manually charged through Member Charge you can add a price.

Item Category

Click the search icon and select the appropriate Item Category.

A/R Override

Click the search icon and select the GL Accounts Receivable Debit Account.

Sales Account

Click the search icon and select the GL Credit Account for income.

Manage F&B Items

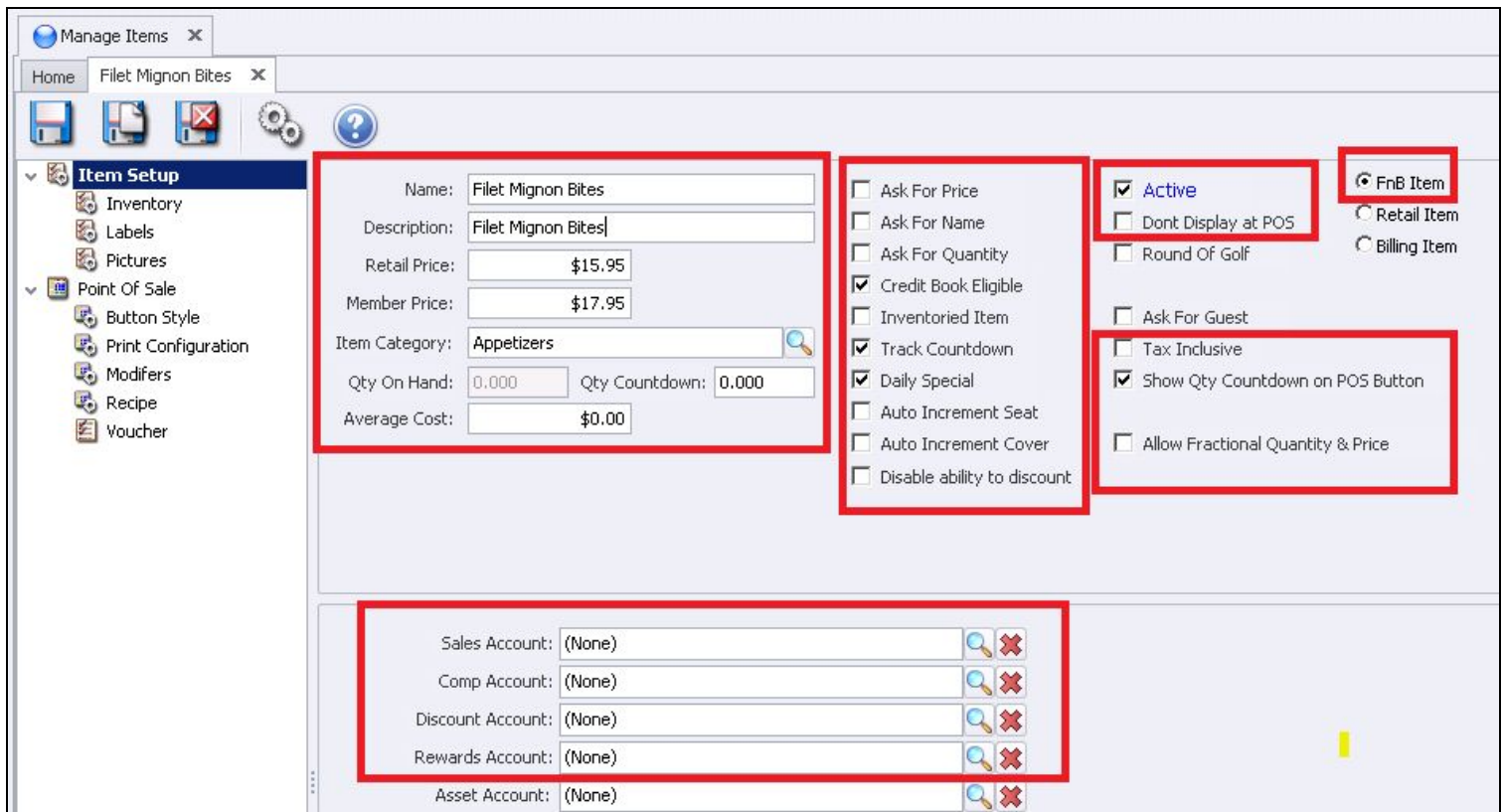
Edit an Item

Highlight the Item and double-click or select the Edit icon on the toolbar.

Create an Item

Click the **New** Icon

The Item Maintenance screen will appear, the fields in the Red boxes can be applied to F&B Items.



FnB Item must be checked.

Item Setup Option

Name

This field is required. Enter the name of the Item, use the **Tab** key on your keyboard to advance to the **Description field**.



Please Note: When you tab out of the **name** box, you will receive the prompt **Would you like to set the Order Name and Button Caption fields to the new value?**

ALWAYS click **YES** to have the system automatically populate the Descriptions for the following:

Order Name

The name that prints on the prep ticket sent to the kitchen or bar.

POS Receipts

Member Receipt.

Button Caption

The name that appears on the POS Button)

Retail Price

Enter the non-member price (see note below).

Member Price

Enter the member price.

Please Note:

- If you have a Member and a Non-Member Price you will need to identify member/non-members in the **Member Type Rule/Use Member Pricing** setup; check with your controller or authorized person.
- If both members and non-members are charged the same price you only need to enter a Retail Price.

Item Category

This field is required. Click the search icon and select the appropriate Item Category.

Average Cost

The average cost for F&B Items is a **theoretical cost**. The Office system does not have an F&B Inventory system but you can manually enter the cost. Items that have a cost in the setup will be added to a the Gross Margin Report.

Ask For Price

If this box is checked, the POS system will prompt the user to enter a price each time this item is ordered. This is usually used for Items such as Market Price or Open Food.

Ask For Name

When checked, the POS system will prompt the user to enter a name for the item each time the item is ordered. This is usually used in conjunction with Ask for Price on items such as Open Food. The name entered will print on the prep tickets and Member Receipts.

Ask For Quantity

When checked, the POS system will prompt the user to enter a quantity each time the item is ordered.

Credit Book Eligible

If the item can be paid with the member's Credit Book (sweeps), check this box. Mainly used for retail items but can be used for F&B too.

Track Countdown

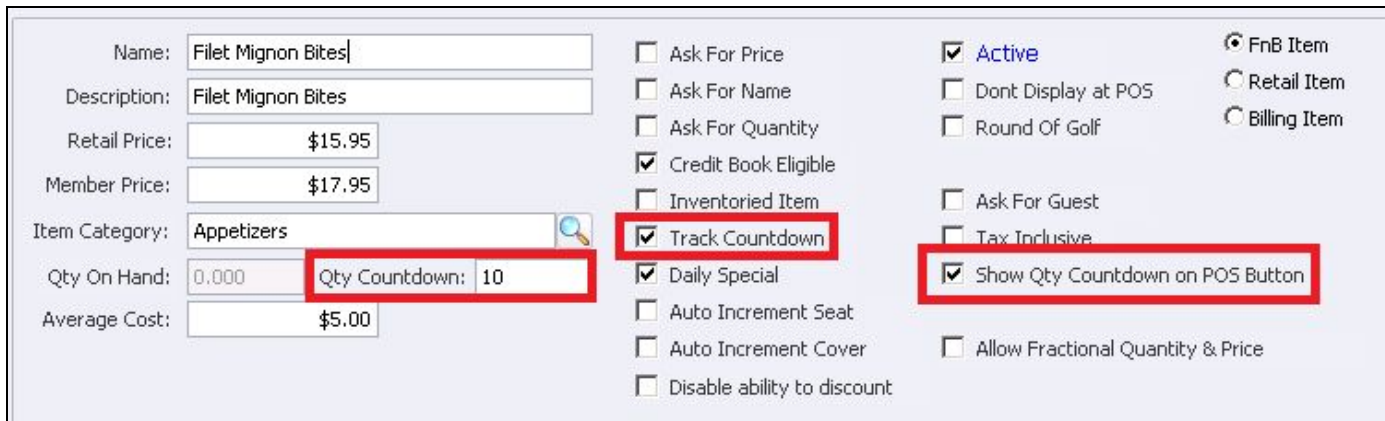
Checking this box allows you to enter a **quantity limit** to be sold at POS. If all fields are set up it will show the countdown on the **Item Button**.

Example: There are only 10 Steaks and want the system to show the remaining steaks available at POS on the item button. This feature also disallows the item to be sold once it reaches the countdown limit. The count will change to X86 on the button. See example below of what the button looks like at POS.



Setup

When you check **Track Countdown** two new fields will appear. Check **Show QTY Countdown** on POS Button and enter QTY in the **QTY Countdown box**.



Name: Filet Mignon Bites
 Description: Filet Mignon Bites
 Retail Price: \$15.95
 Member Price: \$17.95
 Item Category: Appetizers
 Qty On Hand: 0.000
 Average Cost: \$5.00

Ask For Price
 Ask For Name
 Ask For Quantity
 Credit Book Eligible
 Inventoried Item
 Track Countdown
 Daily Special
 Auto Increment Seat
 Auto Increment Cover
 Disable ability to discount

Active
 Dont Display at POS
 Round Of Golf
 Ask For Guest
 Tax Inclusive
 Show Qty Countdown on POS Button
 FnB Item
 Retail Item
 Billing Item

Please Note: This feature is also available in **POS > System Tools > Items**, then check **Change Countdown**.

Daily Special

- If you have a Button Type setup as **Special** on the screen group design it will automatically add the Daily Special Item to the button choices.
- The Item will be listed in the **Main POS screen** then **Specials** Tab.

Please Note: This works well in conjunction with Track Countdown. If the Track Countdown Item also has the Daily Special checked it gives the server the ability to see what the current countdown is before approaching the table and will display **X86** once it reaches its limit (see POS screenshot below).

Tickets		Labor		Specials		Contest		Messages		Events	
Name	Price	Countdown									
Mussel and Clam Ragout	\$10.00										
Filet Mignon Bites	\$15.95	10									
linda test	\$1.50										
Jen's Super Margarita	\$10.00										
Shrimp Cocktail 2	\$0.00										
Steak	\$50.00	10									

Auto Increment Seat

When checked, the POS system will auto-increment the seat number. Checking this is not advised if the server does not take the order in sequential seat order.

Disable Ability to Discount

When checked the item will not be eligible for Discounts or Comps in POS

Active

System defaults to Active. Uncheck this box **ONLY** if the item is no longer available. You will still see the Item at POS but it will not let you ring it up. This is used if items are temporarily not available.

Don't Display at POS

When checked the Item will **NOT** be displayed at POS

Please Note: *If the Item is marked as Active it still will **not** display at POS if this field is checked.*

Tax Inclusive

Put a check only if the price includes Tax and Service Charge and you do not want the system to break it out on the Member Receipt.

Allow Fractional Quantity & Price

Designed for Yacht clubs that sell gasoline and need fractional pricing.

Auto Increment Cover

If this box is checked when the item is sold at POS, it will automatically increase the cover count. Typically, with this feature, only Entrees might have this checked. If your members often choose salads or appetizers as their entrée it is advisable not to check this field.

Please Note: See your accountant before entering Account information. If there is an account on the Item level it will override the Item Category and Group setting. Typically for F&B Items the GL Accounts are setup on the either the Item Category or Item Group level, not the Item level.

Sales Account

Select the revenue account that should be credited when items are sold.

Comp Account

Select the account that should be debited for the amount of any comps made at POS.

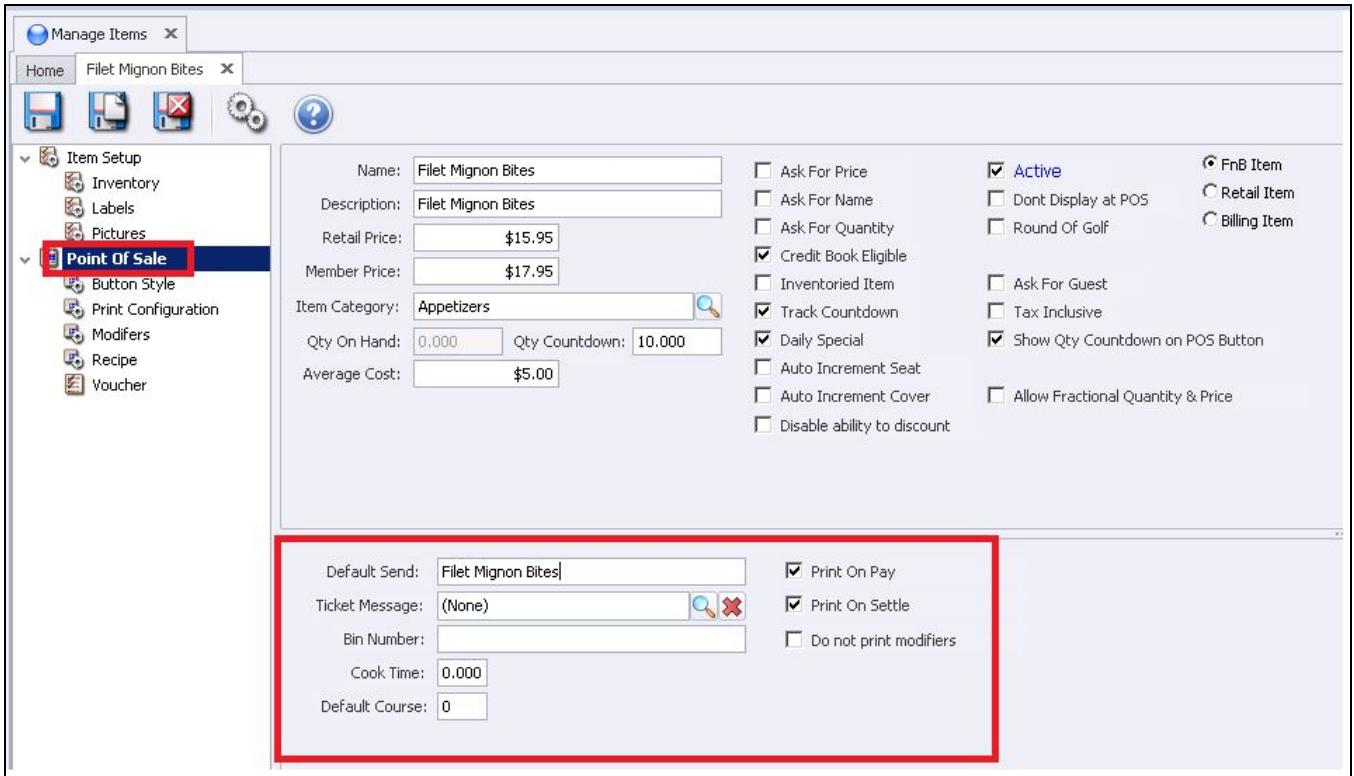
Discount Account

Select the account that should be debited for the amount of any discounts made at POS.

Rewards Account

The field is related to a future feature. Select the clearing account.

Point of Sale Option



The screenshot shows the 'Manage Items' window with the 'Point of Sale' tab selected. The 'Filet Mignon Bites' item is being configured. The 'Point of Sale' option is highlighted in the left-hand menu. The main configuration area includes fields for Name, Description, Retail Price (\$15.95), Member Price (\$17.95), Item Category (Appetizers), Qty On Hand (0.000), and Qty Countdown (10.000). A red box highlights the 'Default Send' field, which contains the text 'Filet Mignon Bites'. Other options include 'Print On Pay', 'Print On Settle', and 'Do not print modifiers'.

Default Send

This is the description that will print on the Prep-printers (kitchen or bar). Do Not leave the field blank if the item needs to print to a remote printer....see notes on next page

Please Note: If you have **Expanded Print** turned on the Default Send description can only be **10 characters including spaces**. The information you entered in the **Name** field will automatically populate the **Default Send** if you answered Yes to the below message when entering the name.



Ticket Message

If necessary, select a ticket message that will print on POS receipts each time this **item** is charged. For example, if your club is hosting an upcoming scotch tasting you might attach a message to each scotch **item** that provides details of the event. (The same type of setting can also be adjusted in the Item Category Area).

Bin Number

This number is used if the club has **Bin numbers** on the wine list. The servers will be able to look up Wine by Bin Number at POS. This is very useful if the club has a large wine list.

Cook Time

Not currently used.

Default Course

If your club enters orders by **Course** it is advisable to assign a default course to the Item. This Default Course can be changed at **POS**.

Print on Pay

When checked, the item will print on the Pay Receipts. A Pay Receipt is what the server presents to a member before closing the ticket to a settlement type.

Print on Settle

When checked, the item will print on the Settle Receipt. A Settle Receipt includes everything that the Pay Receipt displays but also includes the form of payment and additional gratuities.

Please Note: *The only time Print on Pay/Settle should not be checked is if the Item is a zero price. If the item has a price and one of these two fields are not checked; the total on the ticket will be correct but the item will not be listed.*

Do not print modifiers

If this field is checked and the modifier has a price, the price will add into the base price and the modifier **WILL NOT** print on the member receipt.

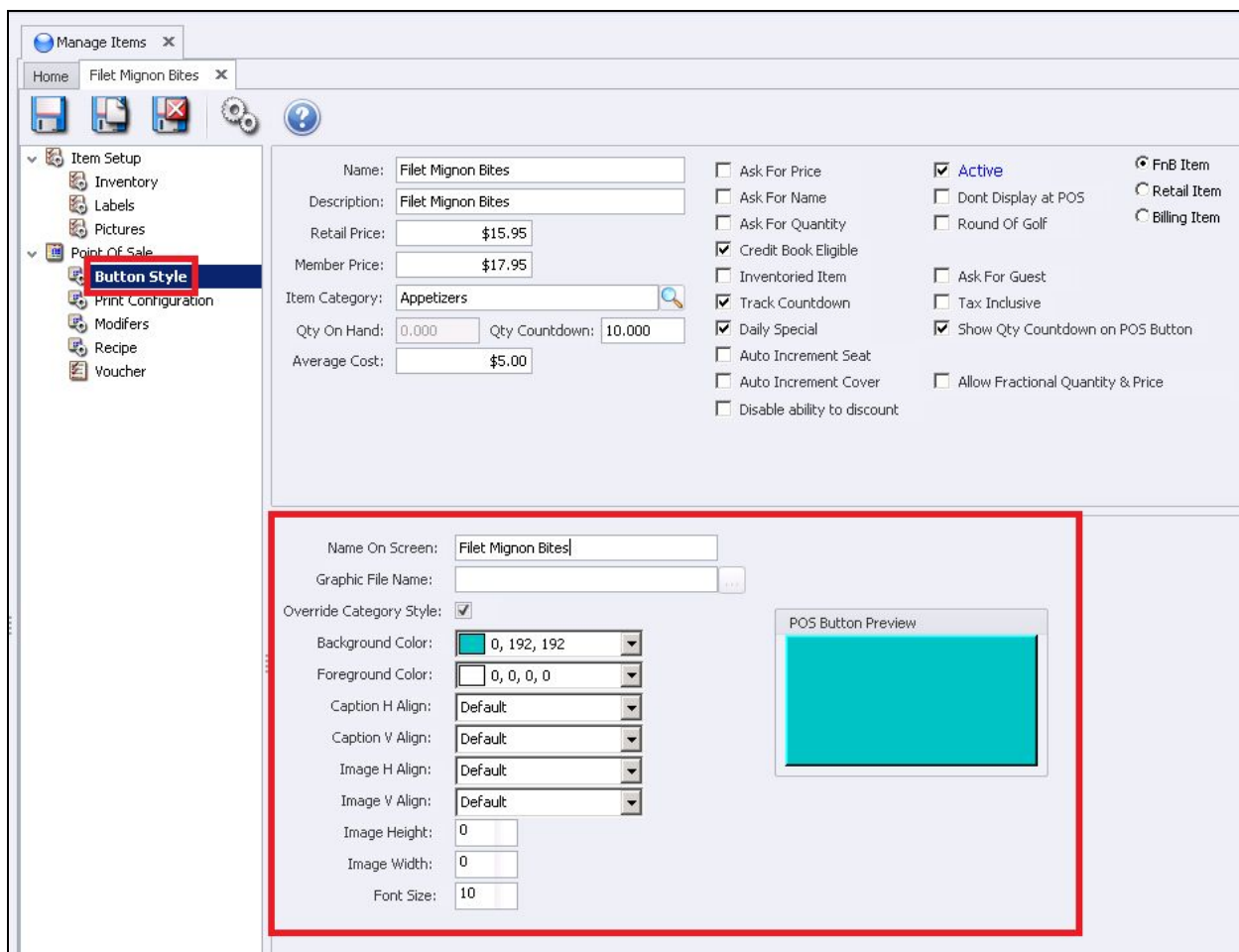
Example: if a pizza is \$10 and three additional toppings were added at \$1 each, the Pizza will show as \$13.00.

If the field is **unchecked** the modifiers will be listed individually on the member receipt with associated price. Example: The pizza will be \$10 with three additional line items \$1 each, for \$3. Typically this is not checked for Food Items but is instead checked for **Liquor Items**.

Example: If the club charges an additional \$1 for Liquor on the Rocks, they would not want the additional charge of \$1 to print on the receipt as Rocks - \$1 and prefer to add the charge into the base price.

Button Style

This area allows you to change how the item **button** will appear in **POS**.



The screenshot shows the 'Manage Items' application window with the 'Filet Mignon Bites' item selected. The 'Button Style' tab is active, and the 'Name On Screen' field is highlighted with a red box. The interface includes a sidebar with navigation options like 'Item Setup', 'Inventory', 'Labels', 'Pictures', 'Point Of Sale', 'Print Configuration', 'Modifiers', 'Recipe', and 'Voucher'. The main area contains various input fields and checkboxes for item configuration.

Field	Value
Name	Filet Mignon Bites
Description	Filet Mignon Bites
Retail Price	\$15.95
Member Price	\$17.95
Item Category	Appetizers
Qty On Hand	0.000
Qty Countdown	10.000
Average Cost	\$5.00
Background Color	0, 192, 192
Foreground Color	0, 0, 0, 0
Caption H Align	Default
Caption V Align	Default
Image H Align	Default
Image V Align	Default
Image Height	0
Image Width	0
Font Size	10

Name on Screen

This is the description to display on the **POS button**. The information entered in the Name field will automatically populate this field if **Yes** is selected in the below message.



Graphic File Name

Upload an image to display on the button. Holding the mouse at the end of the line, a light gray box will appear or click the end of the line to browse to the image file.

Background Color

Click the down arrow and select the the background color.

Foreground Color

Click the down arrow and select the text color.

Caption H Align

Click the down arrow and select the horizontal alignment of the text.

Caption V Align

Click the down arrow and select the vertical alignment of the text.

Image H Align

Click the down arrow and select the horizontal alignment of the image.

Image V Align

Click the down arrow and select the vertical alignment of the image.

Font Size

Enter the text size.

Image Height

Change the image height; 100 is a good starting point.

Image Width

Change the image width; 100 is a good starting point.

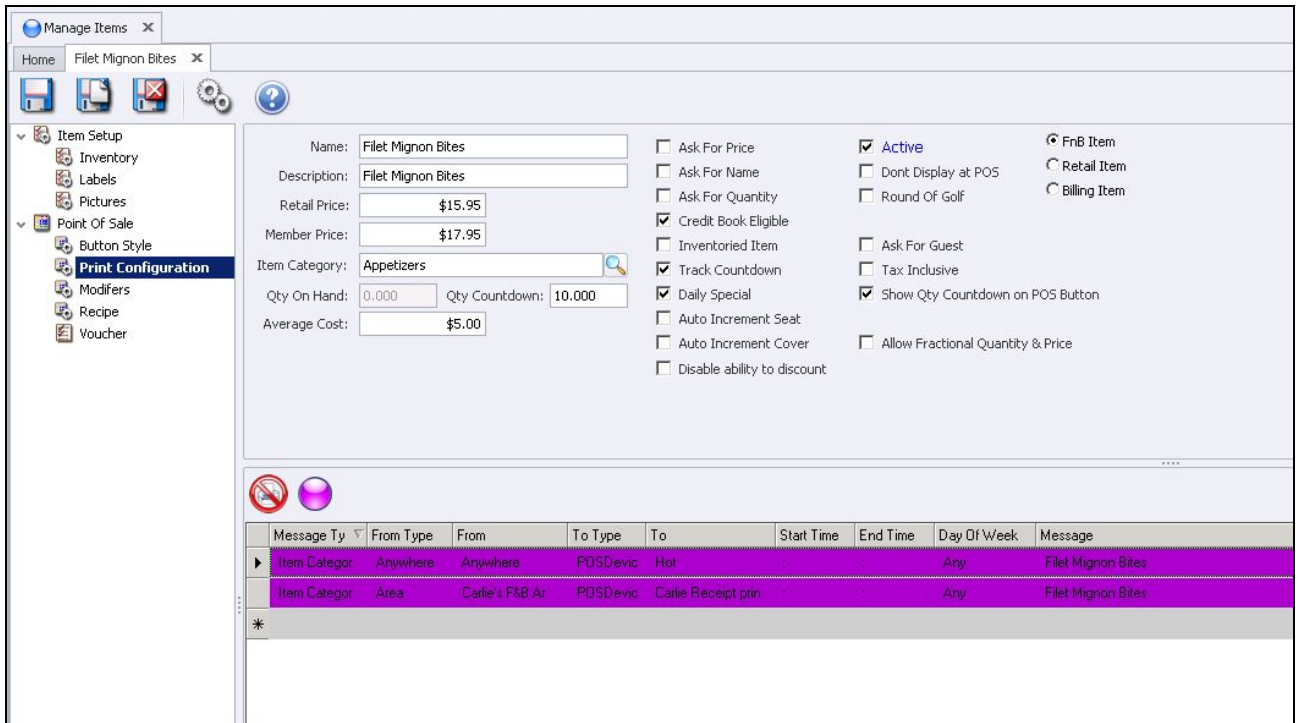
POS Button Preview

This box previews the alignment and colors.

Print Configuration

If the POS Item needs to be sent to a prep printer (kitchen or bar) the settings in this section are what determine where the order will be sent.

The print configuration is set on the Item Category level; the Item inherits the **Category** settings. The default **Category Print Configuration** lines will appear in purple. Nothing needs to be done unless you want to override the Category settings.



The screenshot shows the 'Manage Items' application window with the 'Print Configuration' settings for the item 'Filet Mignon Bites'. The interface includes a navigation pane on the left with options like 'Item Setup', 'Inventory', 'Labels', 'Pictures', 'Point Of Sale', 'Button Style', 'Print Configuration', 'Modifiers', 'Recipe', and 'Voucher'. The main area contains various input fields and checkboxes for configuring the item's behavior and printing options.

Item Details:

- Name: Filet Mignon Bites
- Description: Filet Mignon Bites
- Retail Price: \$15.95
- Member Price: \$17.95
- Item Category: Appetizers
- Qty On Hand: 0.000
- Qty Countdown: 10.000
- Average Cost: \$5.00

Checkboxes:

- Ask For Price
- Ask For Name
- Ask For Quantity
- Credit Book Eligible
- Inventoried Item
- Track Countdown
- Daily Special
- Auto Increment Seat
- Auto Increment Cover
- Disable ability to discount

Active/Inactive Options:

- Active
- Dont Display at POS
- Round Of Golf
- Ask For Guest
- Tax Inclusive
- Show Qty Countdown on POS Button
- Allow Fractional Quantity & Price

Item Type Selection:

- FNB Item
- Retail Item
- Billing Item

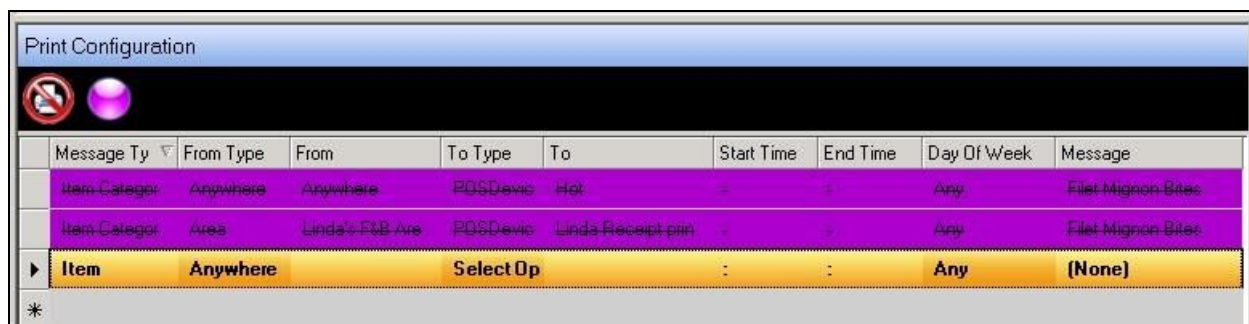
Print Configuration Table:

Message Ty	From Type	From	To Type	To	Start Time	End Time	Day Of Week	Message
Item Categor	Anywhere	Anywhere	POSDevic	Hot			Any	Filet Mignon Bites
Item Categor	Area	Carlie's F&B Ar	POSDevic	Carlie Receipt prin			Any	Filet Mignon Bites
*								

To Change the **Print Configuration** on the Item level:

If you want to change the **Print Configuration** click the Print Icon with the red circle.

Selecting this option will put a strikethrough on the line, **cancelling** the default category settings and adds another line in yellow. Click **Print Configuration Page** for instructions or leave as is, if the Item is not to print anywhere.



Message Ty	From Type	From	To Type	To	Start Time	End Time	Day Of Week	Message
Item Catego	Anywhere	Anywhere	POSDevic	Hot	:	:	Any	Filet Mignon Bites
Item Catego	Area	Linda's F&B Are	POSDevic	Linda Receipt prin	:	:	Any	Filet Mignon Bites
Item	Anywhere	Select Op	:	:	:	:	Any	(None)

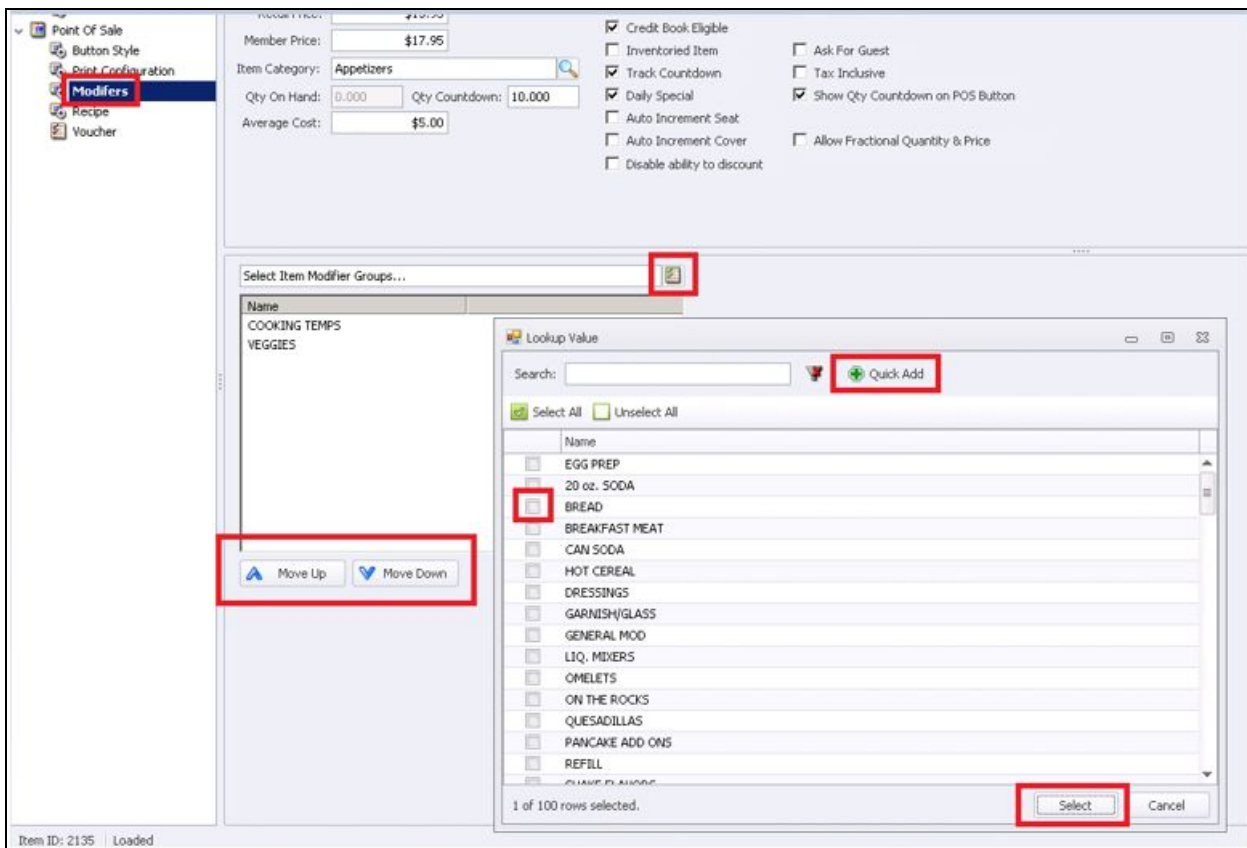
Please Note: To revert back to the default Category settings click on the Purple ball.

Modifiers

Modifiers give the ability to set modifications or choices for additional prep instructions on the item such as Meat Temperatures, side choices, etc. Every time the item is rung up in POS, the modifiers will prompt the server to select from the modifier group.

Select the **LookUp value** to get a list of available Modifier Groups. Click to select the **Modifier Group** to be added, and choose Select on the bottom of the Lookup to add Modifier Group to the Item.

Select the **LookUp value** to get a list of available Modifier Groups. Click to select the Modifier Group to be added, and choose **Select** on the bottom of the Lookup to add Modifier Group to the Item. Groups listed in the **Name** box will be forced at POS.



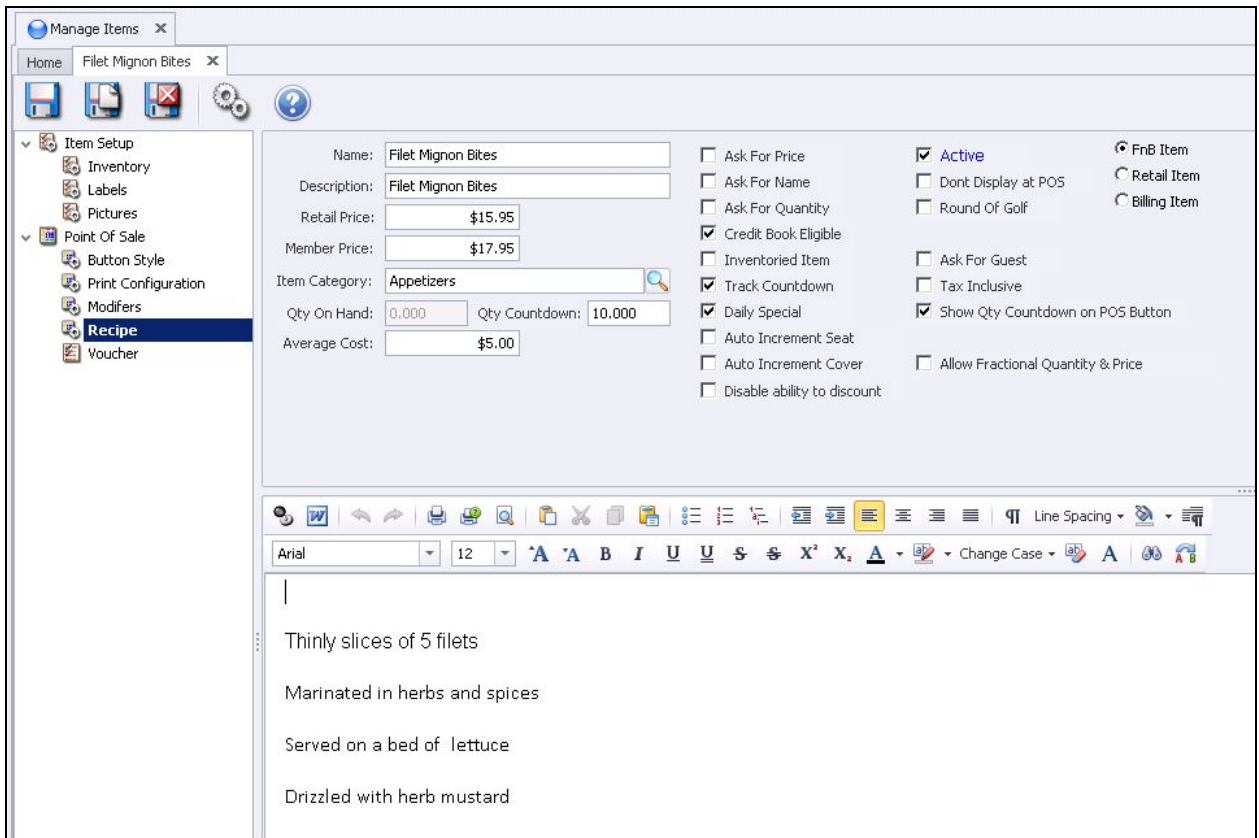
Please Note:

- Use the **Up/Down Arrows** to arrange the order
- If the modifier group you want does not exist > click **Quick Add**; this will take you to the Modifier Group screen to add a new modifier. You can refer to Modifier Groups section of this manual for further instructions.

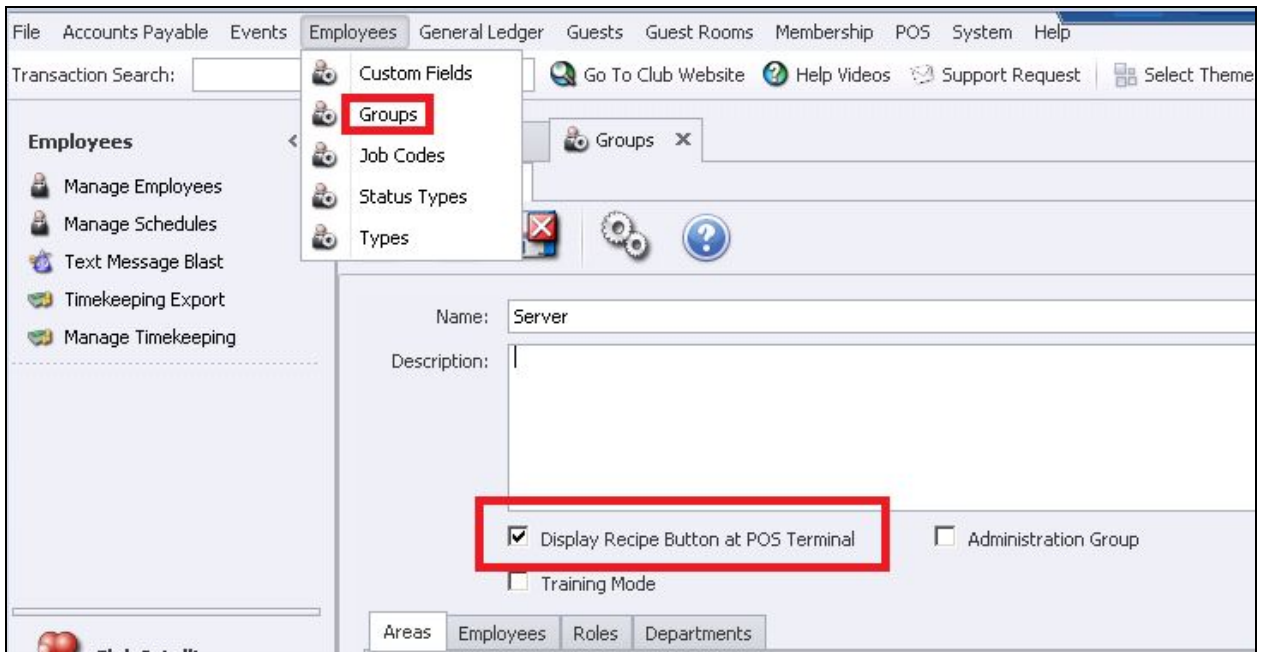
Recipe

The **Recipe** can be seen in the main POS screen by clicking the Recipe Button and searching for the item.

Enter the recipe in the blank area of the Recipe Box. At the top of the Recipe Box is an Editor Toolbar listing basic MSWord functions allowing for customization.



Please Note: Only servers in an **Employee Group** with the appropriate security rights will see the Recipe button. To activate this option, go to Employees, then go to Employee Groups and double click on the Group and put a check on **Display Recipe Button** at POS Terminal (see your accountant or authorized personnel to verify these changes; Clubessential cannot change employee security rights).



Manage Retail Items

To **Edit** an Item:

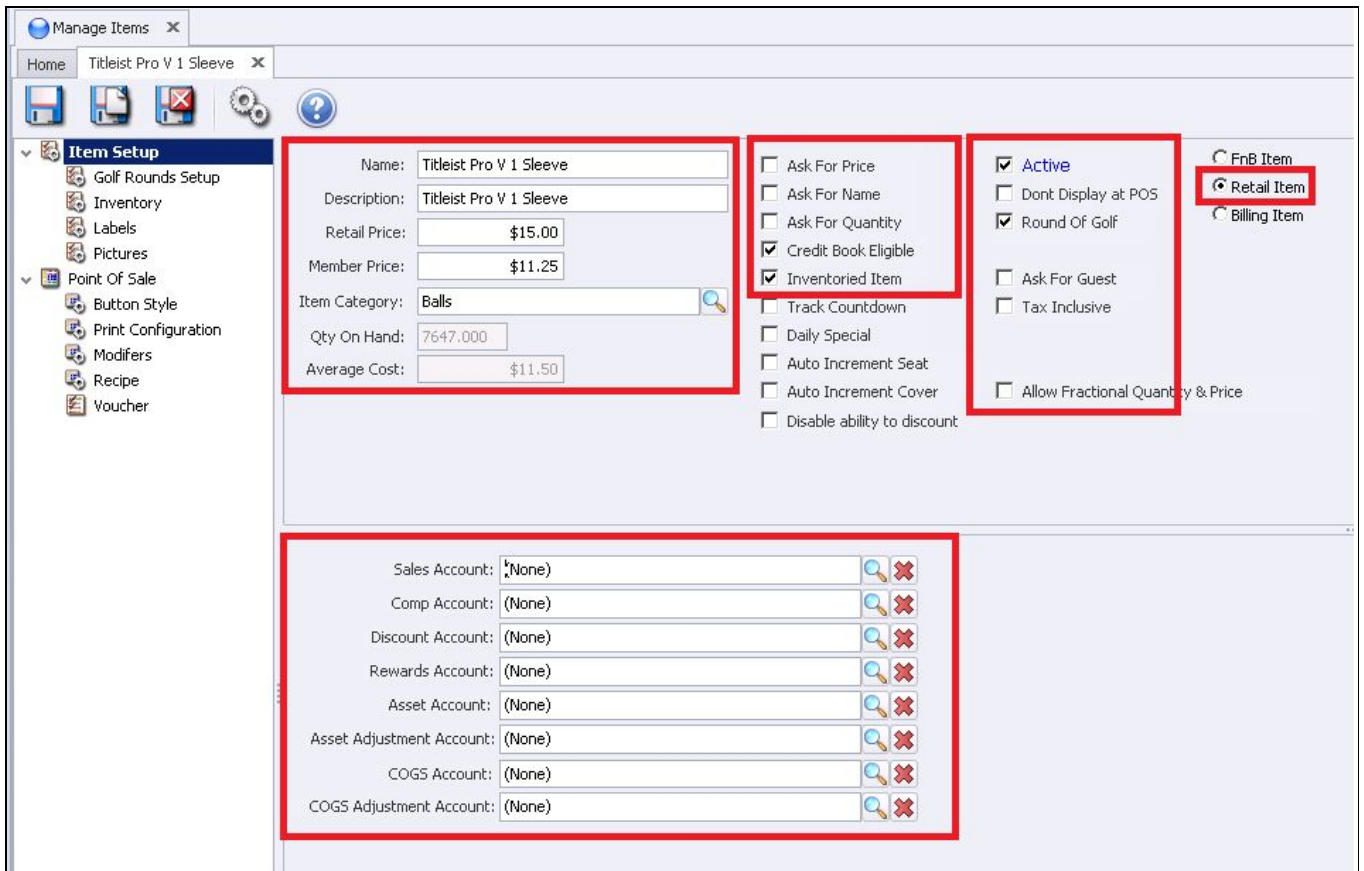
Highlight the Item and double-click or select the Edit icon on the toolbar.

To Create a **New** Item:

Click the **New** Icon

Item Setup Option

The Item Maintenance screen will appear: the fields in the Red boxes can be applied to Retail Items.



Retail Item

Must be checked.

Name

This field is required. Enter the name of the Item and use the Tab key on your keyboard to advance to the Description field.



When you tab out of the name box, you will receive a prompt **Would you like to set the Order Name and Button Caption fields to the new value?**

Always click YES to have the system automatically populate the Descriptions for the following items:

Order Name (This does not apply to Retail)

POS Receipts (Member Receipt)

Button Caption (the name that appears on the POS Button)

Retail Price – Enter the non-member price.

Member Price – Enter the member price.

Please Note: If you have a Member and Non-Member Price, identify member/non-members in the **Member Type setup**. Check with your controller or authorized person to verify. If both members and non-members are charged the same price, only enter a Retail Price.

Item Category

This field is required. Click the search icon and select the appropriate Item Category.

Average Cost

The average cost is calculated by the system and cannot be changed if the item is checked as Inventoried Item.

Ask For Price

If this box is checked the POS system will prompt the user to enter a price each time this item is ordered. This is usually used for Items that do not have a set price such as repairs.

Ask For Name

When checked the POS system will prompt the user to enter a name for the item each time the item is ordered. This is usually used in conjunction with Ask for Price for example repairs, you can add a more specific

description of the repair. The name entered will print on the Member Receipts.

Ask For Quantity

When checked the POS system will prompt the user to enter a quantity for the item each time the item is ordered.

Credit Book Eligible

If the item can be paid for with a member's Credit Book (sweeps), you will want to check this box.

Inventoried Item

Check this box if this item will be tracked as part of the perpetual inventory tracking.

Please Note: *If this field is checked the cost field will be grayed out. Only through Item Receipts can the cost be calculated and only through Inventory Adjustments can the cost be changed.*

Disable Ability to Discount

When checked the item will not be eligible for Discounts or Comps in POS.

Active

System defaults to Active. Uncheck this box **ONLY** if the item is no longer available. The Item will still be visible at POS but it will not be clickable. This is used if items are temporarily not available.

Don't Display at POS

When checked the Item will NOT be displayed at POS.

Please Note: *If the Item is marked as Active it still will not display at POS if this field is checked.*

Round of Golf

If you have our Links Tee Sheet this does not apply to your club. The Rounds report will be tracked by the Tee Sheet sign in's. If you do not have the Links Tee Sheet and would like to track this item as a round of Golf check this field.

Please Note: *When this field is checked the option Golf Rounds Setup will be activated.*

Ask for Guest

When checked, the user will be prompted to enter the Guest Name each time this item is sold at POS. This feature is commonly used for items such as Guest Green Fees.

Please Note: This allows the shop to track the number of visits of individual guest.

Tax Inclusive

Check only if the price includes Tax and Service Charge and you do not want the system to break it out on the Member Receipt.

Allow Fractional Quantity & Price

Designed for Yacht clubs that sell gasoline and need fractional pricing.

Please Note: *See your accountant before entering Account information. If there is an account on the Item level it will override the Item Category and Group setting. Typically for Retail Items the GL Accounts are setup on the either the Item Category or Item Group level, not the Item level.*

Sales Account

Select the revenue account that should be credited when items are sold

Comp Account

Select the account that should be debited for the amount of any comps made at POS.

Discount Account

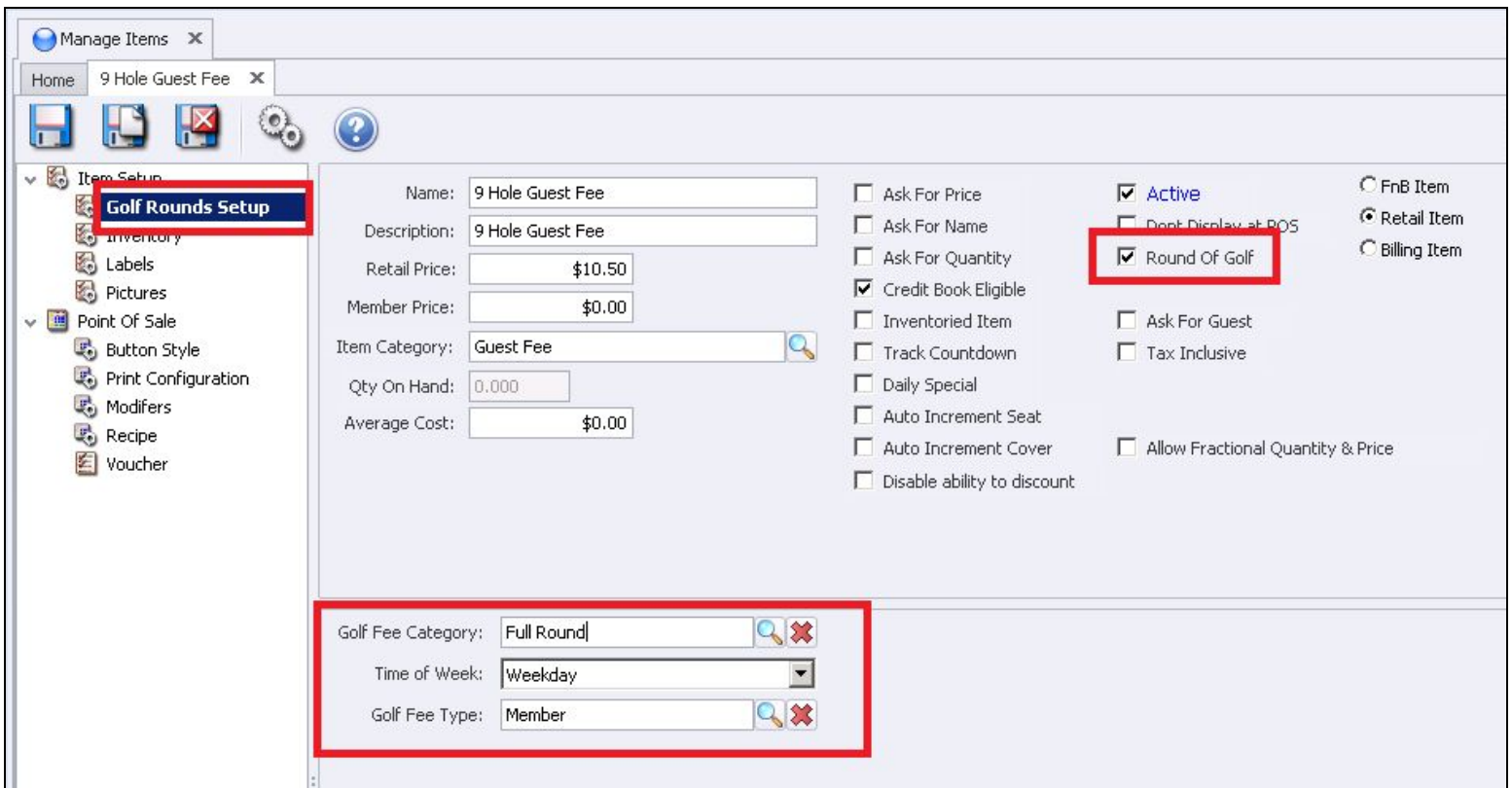
Select the account that should be debited for the amount of any discounts made at POS.

Rewards Account

The field is related to a future feature. Select the clearing account.

Golf Rounds Setup

If **Round of Golf** is checked it will activate this option different types of play can be set up here.



Click the lookup or drop down for choices; the choices are hardcoded and cannot be changed.

Number of Holes:

- Full
- Half
- Other

Time of Week:

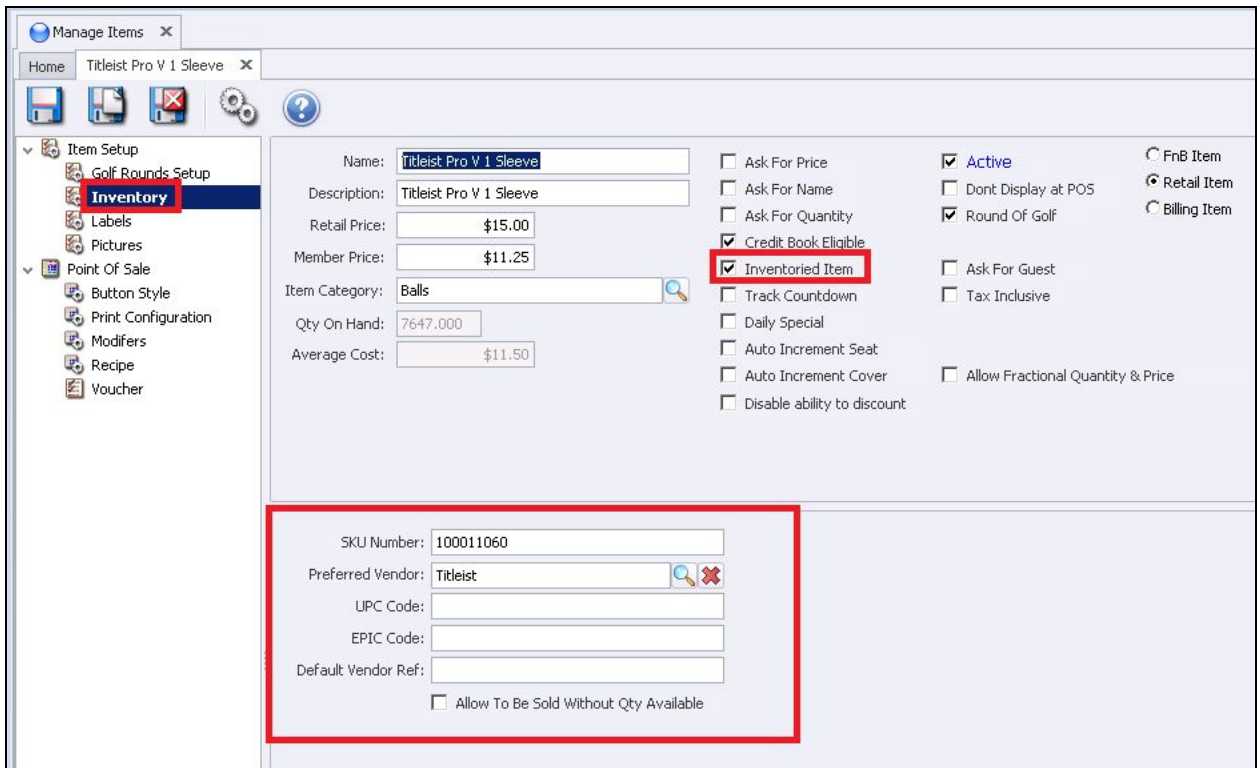
Weekday
Weekend
Holiday
Other

Round Type:

Member
Guest
Jr
Tournament
Comp
Outside tournament
Member Event
PGA

Inventory

Only If the field Inventoried Item is checked does the information need to be entered.



The screenshot shows the 'Manage Items' window for 'Titleist Pro V 1 Sleeve'. The left sidebar lists 'Item Setup' options, with 'Inventory' highlighted. The main form contains the following fields and options:

- Name: Titleist Pro V 1 Sleeve
- Description: Titleist Pro V 1 Sleeve
- Retail Price: \$15.00
- Member Price: \$11.25
- Item Category: Balls
- Qty On Hand: 7647.000
- Average Cost: \$11.50
- Options: Ask For Price, Ask For Name, Ask For Quantity, Credit Book Eligible, Inventoried Item, Track Countdown, Daily Special, Auto Increment Seat, Auto Increment Cover, Disable ability to discount
- Active: Active
- POS: Dont Display at POS, Round Of Golf
- Item Type: FrnB Item, Retail Item, Billing Item
- Ask For Guest: Ask For Guest
- Tax Inclusive: Tax Inclusive
- Allow Fractional Quantity & Price: Allow Fractional Quantity & Price

The 'SKU Number' field is highlighted with a red box and contains the value '100011060'. Other fields in this section include 'Preferred Vendor' (Titleist), 'UPC Code', 'EPIC Code', and 'Default Vendor Ref'. There is also a checkbox for 'Allow To Be Sold Without Qty Available'.

SKU Number

The system will automatically create a SKU Number.

Please Note: *The SKU will not be generated until you **SAVE**. You can create your own SKU if you do not want the system generated SKU; we highly recommend that if you want your own numbering system that you use the UPC code.*

Preferred Vendor

The vendor you purchase the Item from. To find your preferred vendor, click the search Icon and select the Vendor.

UPC Code

You can scan or enter the Item UPC code

Please Note: *You can also create your own Numbering system; some shops want to use their old SKU so they do not have to re-label all their merchandise. When you scan the item in POS the system will first look at the UPC code, if there is no UPC code the system will look at the generated SKU.*

EPIC Code

This field is not currently used.

Default Vendor Ref

Enter the number the supplying Vendor uses to refer to this item

Re-Order

This field is not currently used.

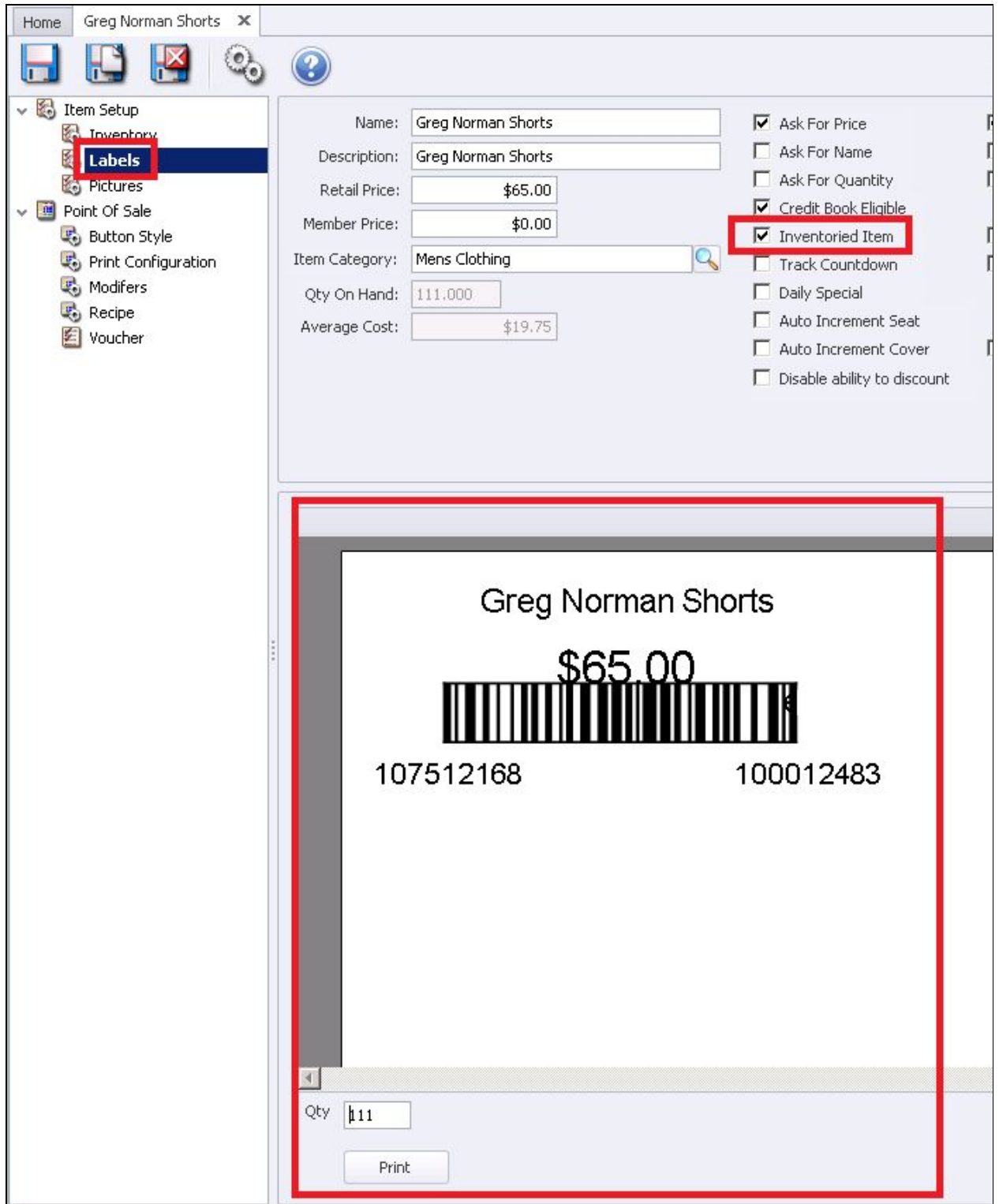
Allow To Be Sold Without Qty Available

If this field is **NOT** checked the system will look at the QTY on hand, if the item has a zero QTY you will not be not be allowed to sell the item at POS.

Please Note: If the shop wants the item immediately available to sell but does not enter the inventory the day it arrives, it is highly recommended that this field is checked.

Labels

The Label option will display the Item label format and QTY On Hand. Labels can be printed for a single item in the maintenance screen.



- Top is the **description** of the Item.

- The **price**.
- **Bar Code**
- Bottom Right is the **SKU**
- Bottom Left is a **cost code**: the shop can use this code to see the purchased date and cost.
- **QTY** field defaults to the total on Hand; you can change the QTY if you wish to print less or more labels, then click Print.

Pictures

Pictures can be uploaded of the Item(s); the picture can only be seen in this screen and nowhere else in the system.

Point of Sale Screen

The **Point of Sale** screen is where you will specify if the item is to print on the POS Receipts.

Print on Pay

When checked, the item will print on the Pay Receipts. A Pay Receipt is what is presented to the member before closing the ticket to a settlement type.

Print on Settle

When checked, the item will print on the Settle Receipt. A **Settle Receipt** includes everything that the Pay Receipt displays but also includes the form of payment and additional gratuities. Typically Retail Shops do not print a Pay Receipt and only Print a Settle Receipt.

Please Note: If **Print on Pay** and **Print on Settle** are not checked the Items will not be listed on the receipts. The only time a club should choose not to print an item on a receipt is if it is a zero priced item.

Example: The club might want to track Member Green Fees that are not charged or towels given at the Pool; they would ring up the item at POS for reporting purposes but do not want it on the member receipt. If the item has a price and one

of these two fields are not checked; the total on the ticket will be correct but the item will not be listed.

Button Style

This area allows you to change how the button for the Item will appear in POS.

Name on Screen

This is the description to display on the POS button. The information you entered in the Name field will automatically populate this field if you answered Yes to the below message.



Graphic File Name

You can upload an image to display on the button. Holding the mouse at the end of the line, a light gray box will appear or click the end of the line to browse to the correct image file.

Background Color

Click the down arrow and select the color you want for the background.

Foreground Color

Click the down arrow and select the color you want for the text

Caption H Align

Click the down arrow and select the horizontal alignment of the text.

Caption V Align

Click the down arrow and select the vertical alignment of the text.

Image H Align

Click the down arrow and select the horizontal alignment of the image.

Image V Align

Click the down arrow and select the vertical alignment of the image.

Font Size

Enter the font you want the text size to be.

Image Height

Change the image height; 100 is a good starting point.

Image Width

Change the image width; 100 is a good starting point.

POS Button Preview

This box will give you a preview of what the alignment and colors will look like.

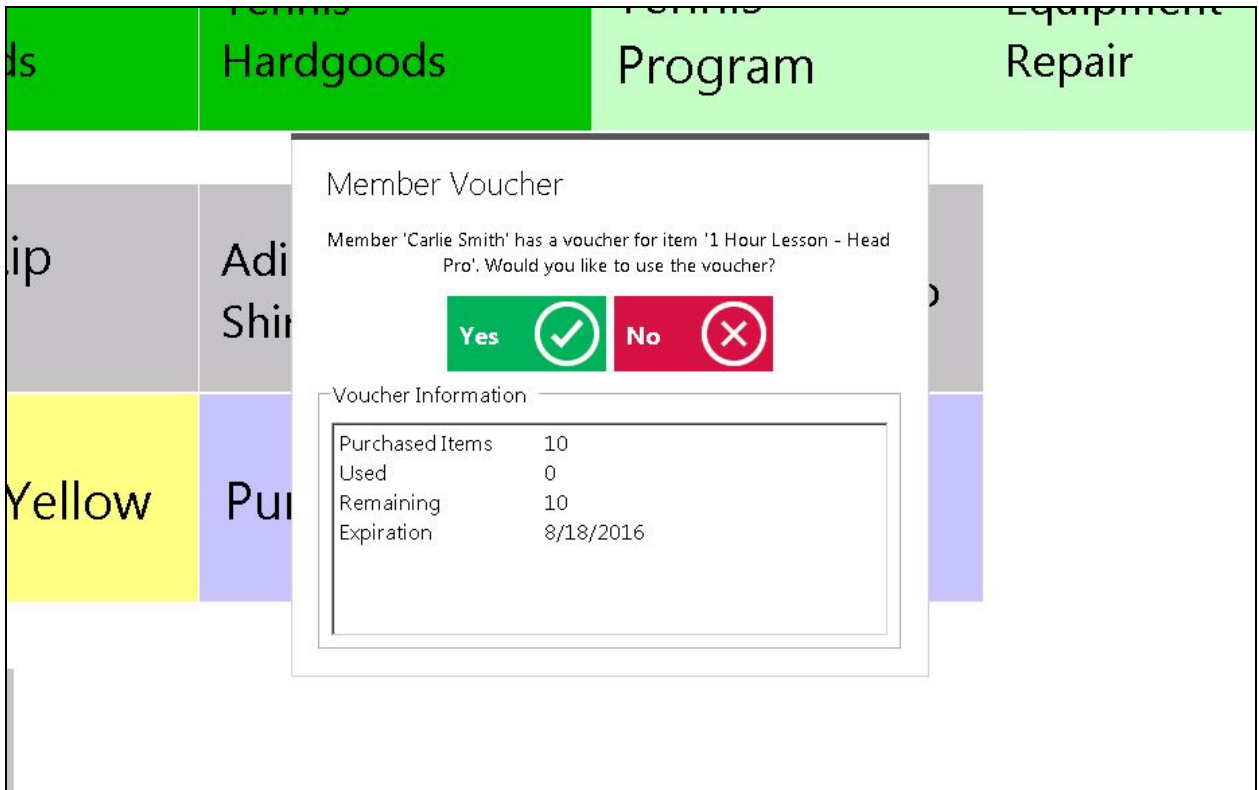
Vouchers

How to **Sell the Voucher:**

In POS sell the Voucher Item and **close** the ticket (once a voucher has been sold it is immediately ready to be redeemed).

How to **Redeem the Voucher:**

When an item associated with the Voucher is sold the system will see the member has purchased the Voucher and will prompt a confirmation message. **Member Carlie Smith has a voucher for Item '1 Hour Lesson'; Would you like to use the Voucher?** See example below.



Selecting **YES:**

The system charges the item on the ticket and credits the amount; the ticket total will be zero. It also credits any difference between the **Item Price** and the **Voucher Price**. This allows you to use existing POS Items at a different price when setting up Vouchers.

Please Note: *The income is recorded at the time you sell the Voucher Item; the system uses Credit Item when redeeming the Voucher to reduce the amount remaining.*

Selecting **NO:**

The item will be added to the ticket as normal. The members can chose to use or not use one of their vouchers.

Voucher Rules

Once you sell a voucher, changes to the voucher setup will not affect any Vouchers previously sold. Only vouchers sold after the changes will contain the new setup.

*Example: A voucher is setup to use items 1, 2 and 3. Days later you decided that item 4 should also be included. Any member that bought the voucher setup with items 1, 2 and 3 will not get credit when they buy item. Anyone who buys the voucher **after** the changes will include items 1, 2, 3 and 4.*

Please Note: *The vouchers can only be sold through POS. You cannot sell or redeem them through member charge.*

Voucher Setup

Credit Item

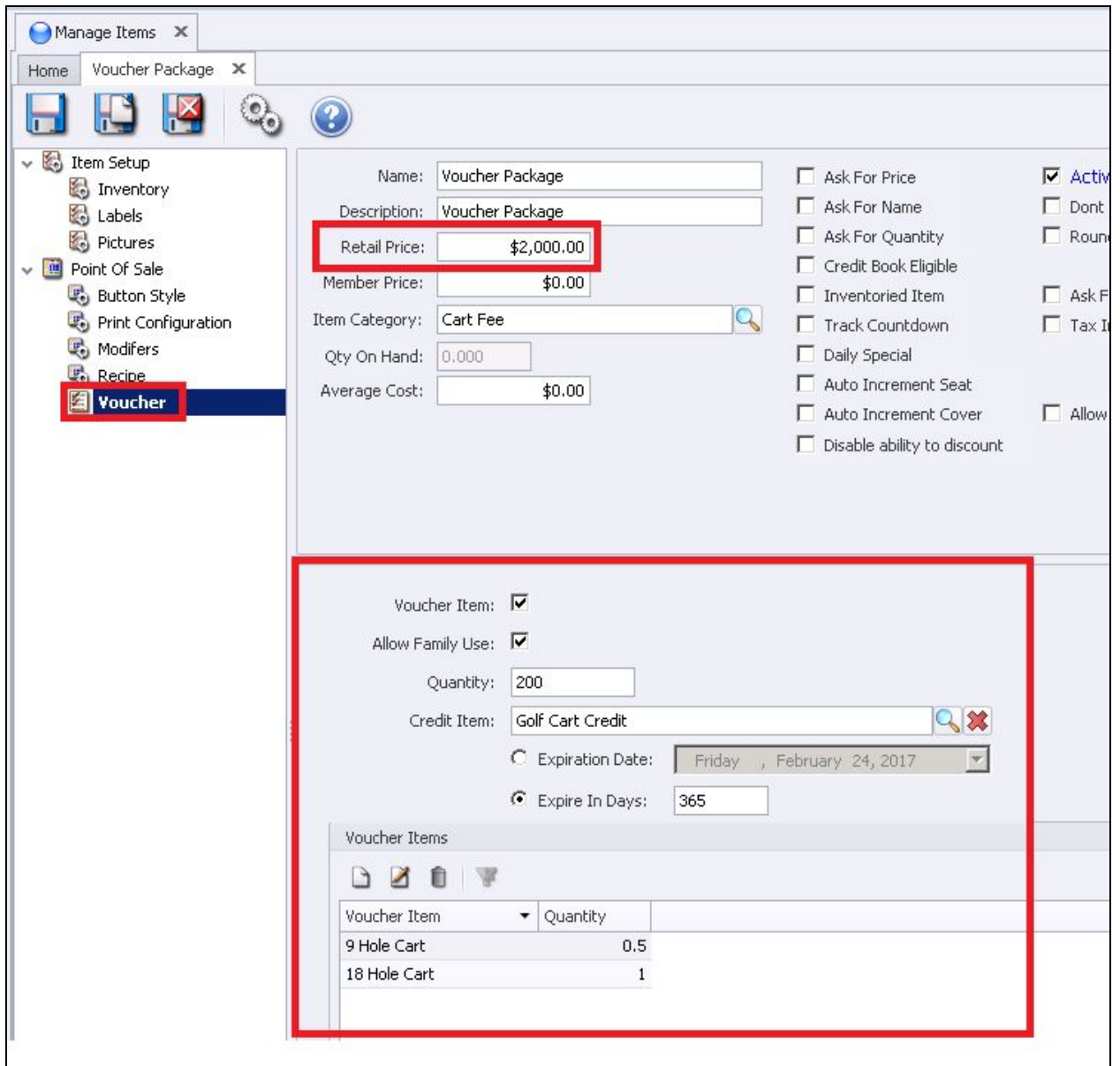
Create a POS item just like any other item; set the price at 0. This item will be used to credit the sale. The GL and Tax Code need to match the Voucher Item being sold; to ensure the setup is correct, point the **Credit Item** to the same **Category** as the **Voucher Item**.

Please Note: *The income is recorded at the time you sell the Voucher Item; the system uses the Credit Item when redeeming the Voucher to reduce the amount remaining.*

Voucher Item

Create a POS item; enter a Name, Price and Category.

Please Note: The Retail Price is the total value of the Voucher.



Manage Items x

Home Voucher Package x

Item Setup

- Inventory
- Labels
- Pictures
- Point Of Sale
 - Button Style
 - Print Configuration
 - Modifiers
 - Recipe
 - Voucher**

Name: Voucher Package

Description: Voucher Package

Retail Price: \$2,000.00

Member Price: \$0.00

Item Category: Cart Fee

Qty On Hand: 0.000

Average Cost: \$0.00

Ask For Price

Ask For Name

Ask For Quantity

Credit Book Eligible

Inventoried Item

Track Countdown

Daily Special

Auto Increment Seat

Auto Increment Cover

Disable ability to discount

Active

Dont

Round

Ask F

Tax I

Allow

Voucher Item:

Allow Family Use:

Quantity: 200

Credit Item: Golf Cart Credit

Expiration Date: Friday, February 24, 2017

Expire In Days: 365

Voucher Items

Voucher Item	Quantity
9 Hole Cart	0.5
18 Hole Cart	1

Select the **Voucher Option**:

Voucher Item

Check this box to activates the Item as a Voucher.

Allow Family Use

Check this box if all family members can redeem the voucher.

Quantity

Enter the number of full QTY to redeem.

Credit Item

Enter the item created in Step 1.

Expiration

Select the Expiration method.

Expiration Date

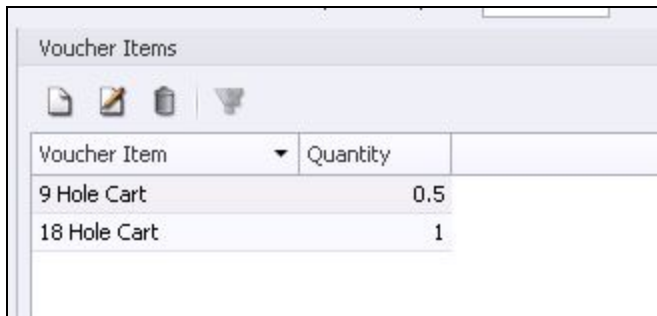
Select the calendar date.

Expiration in Days

Select the number of days to expire.

Voucher Items

Items that will be available to be redeemed (there is no limit).



Voucher Item	Quantity
9 Hole Cart	0.5
18 Hole Cart	1

Select the **New** Icon.

The **Voucher Detail Box** will display, enter the first Item.



Voucher Details

Voucher Item: 9 Hole Cart

Price: \$2.89

Quantity: 0.5

ID: 56 Loaded

VoucherPOSItem

One of the items available to redeem.

Price

This is the value to be reduced from the total value of the Voucher.

Example: if the total voucher value is sold for \$800 and the Item price is \$40 the remaining after redeemed will be $800 - 40 = 760$.

Quantity

This is the QTY to be reduced from the Voucher QTY total.

Example: if the Voucher had a QTY total of 10 to be redeemed and the Item QTY is set at .5 the remaining after redeemed will be $10 - .5 = 9.5$

Click **Save & Close**.

Please Note: *If more than one item qualifies; repeat steps **4a to 4c** until all items have been set up. Please remember to **Save & Close** when finished.*

Manage Item Combos

Combos allow you to sell multiple items with a single transaction. The Combo transaction sales can be broken out on the GL Financials or summarized.

Select **Item**, then select **Manage Item Combos**.



The screenshot shows the 'Manage Item Combos' interface. The left sidebar contains various management options, with 'Manage Item Combos' highlighted. The top navigation bar also shows 'Manage Item Combos' with a close button. The main area features a toolbar with icons for New, Edit, Delete, Export, Refresh, Clear Filter, and Active. Below the toolbar is a table with two columns: 'Name' and 'Description'.

Name	Description
18 Hole Women's Guest Day	18 Hole Women's Guest Day
18-Hole Mini Guest Day	18-Hole Mini Guest Day
2012 Club Season Opener	2012 Club Season Opener
9 & 18 Hole Mixer	9 & 18 Hole Mixer
9 & 18 Hole Mixer	9 & 18 Hole Mixer
9 & 18-Hole Kickoff Party	9 & 18-Hole Kickoff Party
9 Hole Mini Guest Day	9 Hole Mini Guest Day
9-Hole Women's Guest Day	9-Hole Women's Guest Day
a test combo	
Acorn Cup Invitational	Acorn Cup Invitational
Angie's Combo Test	Angie's Combo Test
BTS Buffet and Pool Party	
Candlelight Dinner	Candlelight Dinner
Candlelight Dinner w/Dessert	Candlelight Dinner w/Dessert
Couples Guest Day '09	Couples Guest Day '09
Diffley Dinner	Diffley Dinner
Entertainment-Combo	Entertainment-Combo
Family Bingo	Family Bingo
Family Bingo	Family Bingo
Food/Bar Test Combo Item	
Fred's Big Burger Special	
G Test Dz Balls-2016	
Golf for the Cure Guest	Golf for the Cure Guest
Golf for the Cure Mem	Golf for the Cure Mem
Great Saturday Morning Get Together	
Great Saturday Morning Get Together	Great Saturday Morning Get Toget
Member Member	Member Member
Memorial Weekend Shotgun	Memorial Weekend Shotgun
Men's Die Hard	Men's Die Hard
Men's Guest Day	Men's Guest Day
Men's Guest Day2	Men's Guest Day
Nine & Dine	Nine & Dine
Open price	
Professional's Cup	Professional's Cup

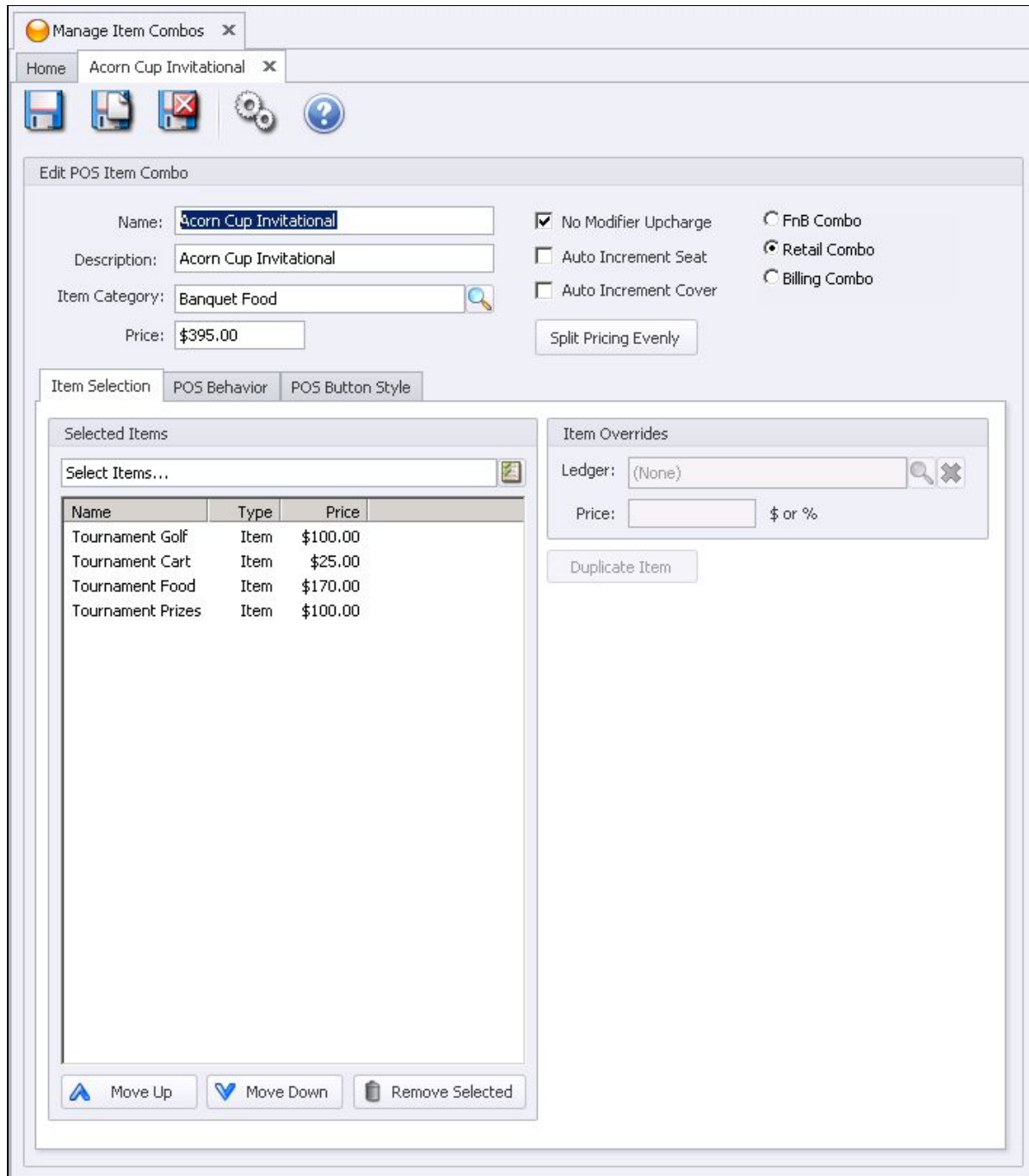
To **Edit** a Combo:

Highlight the Item and double-click or select the **Edit** icon on the toolbar.

To Create a **New** Combo:

Click the **New** Icon.

The **Combo Maintenance screen** will appear.



Name

Give the combo a Name.

Description

Additional description of the Combo; this is optional for internal viewing only.

Category

Click the search Icon and select the associated category.

Price

Enter the total price for the Combo.

Split Price Evenly

Click this button if you want the system to evenly distribute the amount to the items.

No Modifier Upcharge

If the item you are selecting has modifiers with prices; do you want the combo not to apply the additional charge.

Auto Increment Seat

For F&B only if using seat position (see [Manage F&B Items](#) for more details).

Increment Cover

For F&B only if using Cover Count (see [Manage F&B Items](#) for more details).

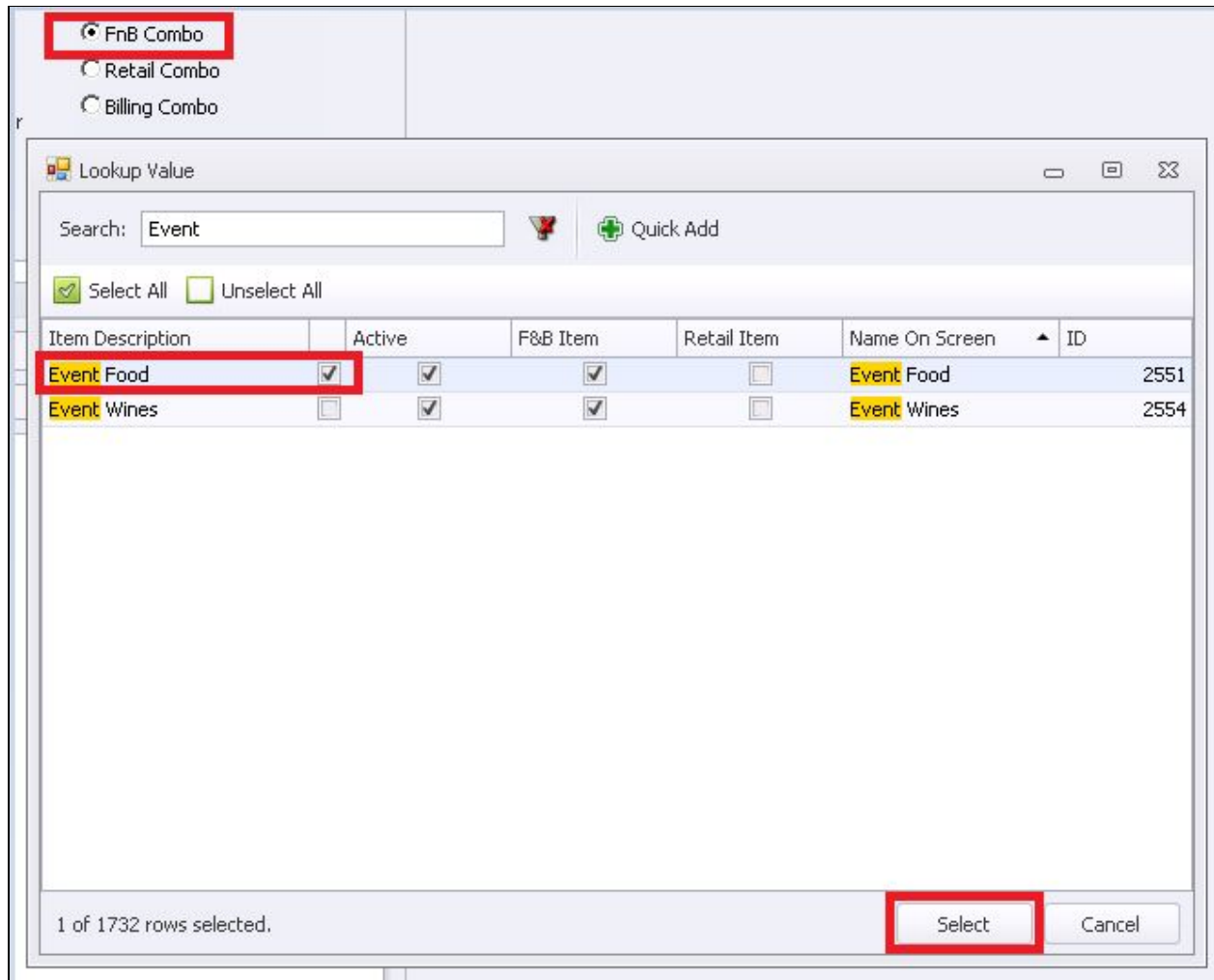
Please Note: Select **FnB** for F&B POS sales, **Retail** for Retail sales, or **Billing** for member billing (POS will not see Billing Combos).

Item Selection Tab

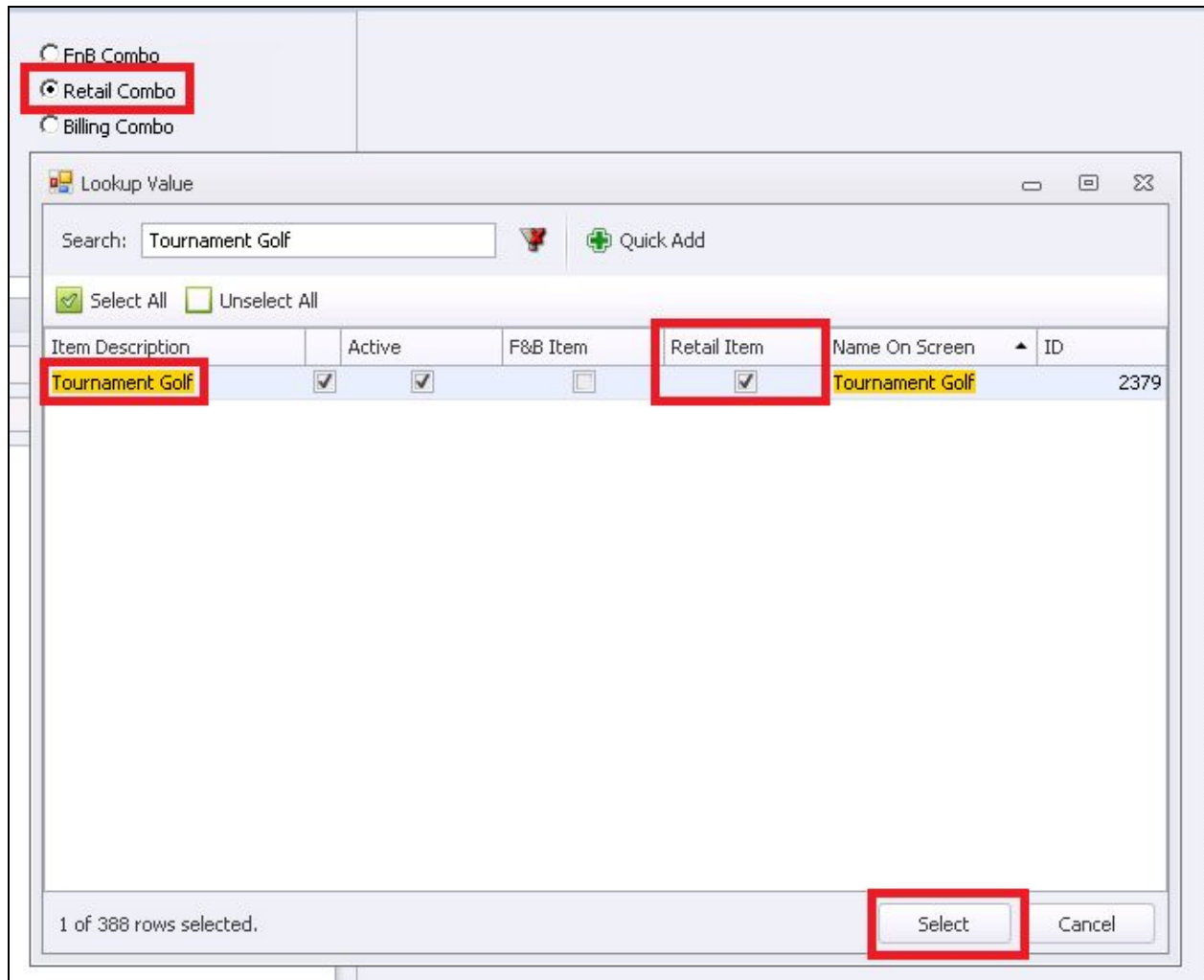
The **Select Items Lookup** icon will list the available items to be added to the combo.

Please Note: To add a combination of F&B, Retail, and Billing items, the combo itself will have to be specified accordingly. For example, if a Golf Tournament Combo will have both F&B and Retail items, the combo will first have to be set as an 'F&B Combo' to add the F&B item.

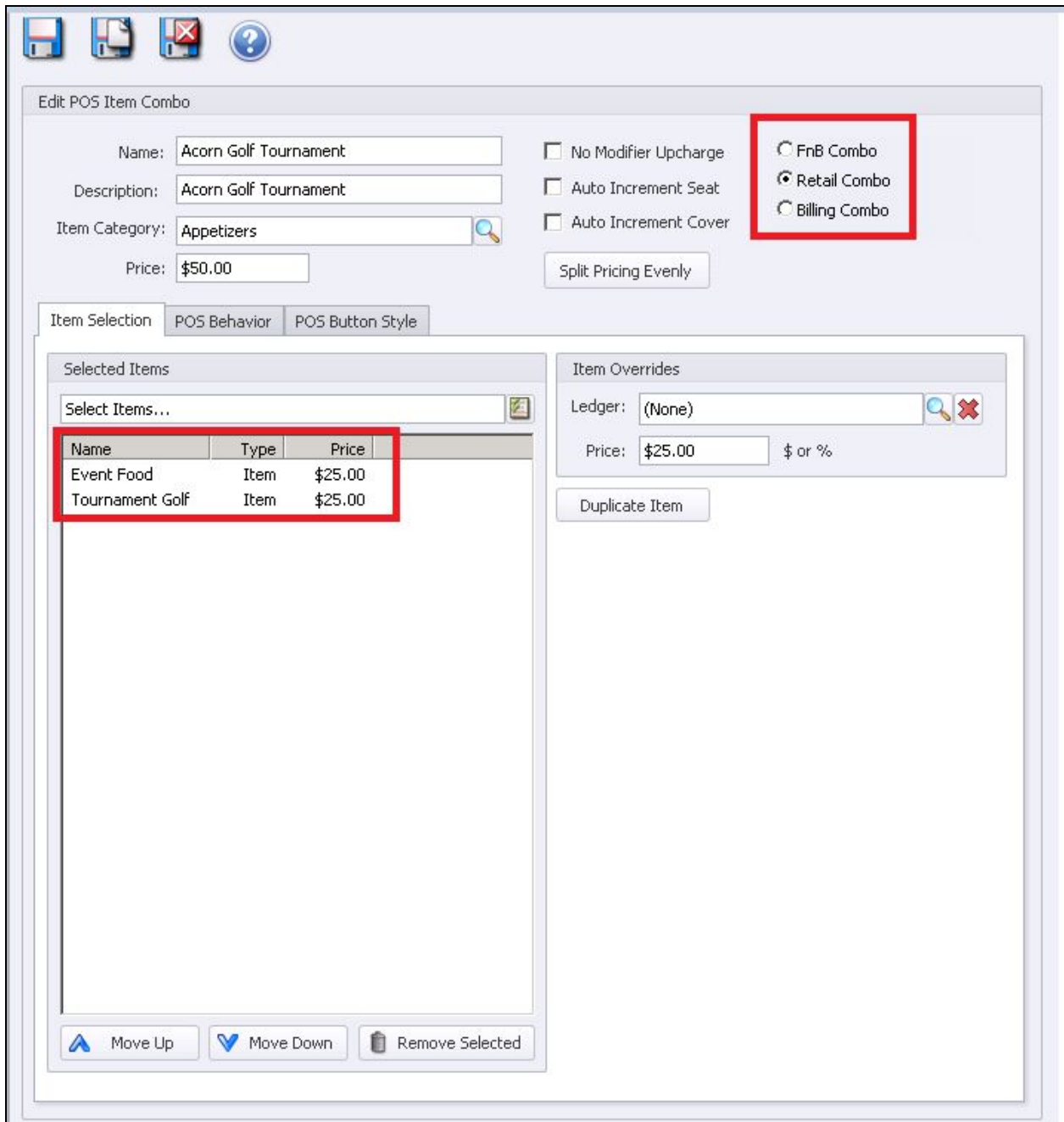




To add the **Retail** item, change the combo set up to '**Retail Combo**' and now the Select Items Lookup will display all available Retail Items. Example below.




The Combo will now include both **F&B and Retail** items. Lastly, remember to change the **combo setup** to reflect whether the combo is an F&B or Retail event.



Edit POS Item Combo

Name: No Modifier Upcharge FnB Combo


Description: Auto Increment Seat Retail Combo

Item Category:  Auto Increment Cover Billing Combo

Price:



Item Selection POS Behavior POS Button Style

Selected Items

Select Items... 

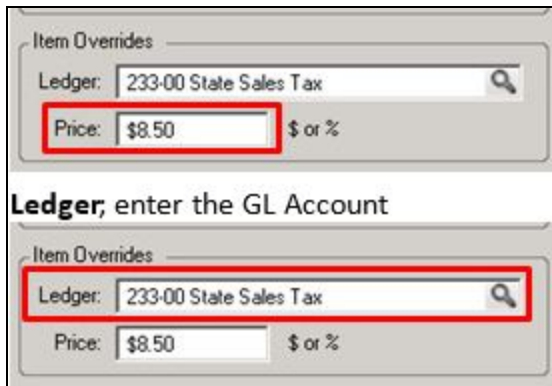
Name	Type	Price
Event Food	Item	\$25.00
Tournament Golf	Item	\$25.00

Item Overrides

Ledger:  

Price: \$ or %

In the **Item Overrides** box, enter the highlighted Item **Price**.



Item Overrides

Ledger: 233-00 State Sales Tax

Price: \$8.50 \$ or %

Ledger, enter the GL Account

Item Overrides

Ledger: 233-00 State Sales Tax

Price: \$8.50 \$ or %

Please Note: If there is **no GL Account listed**, the system will use the rules set on the specific Items within the Combo to determine the GL Posting. The Item Category selected on the Item Combo does **NOT** determine the GL Posting; it is important that you check with your accountant to ensure the sales are hitting the correct GL. The total of all the items must equal the total of the **Combo Price**; you will not be able to save until the Difference amount no longer displays.



Edit POS Item Combo

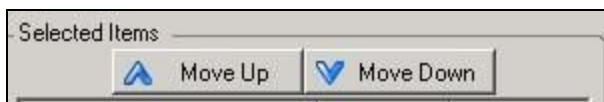
Name: Acorn Cup Invitational

Description: Acorn Cup Invitational

Item Category: Banquet Food

Price: \$395.00 Difference: \$26.50

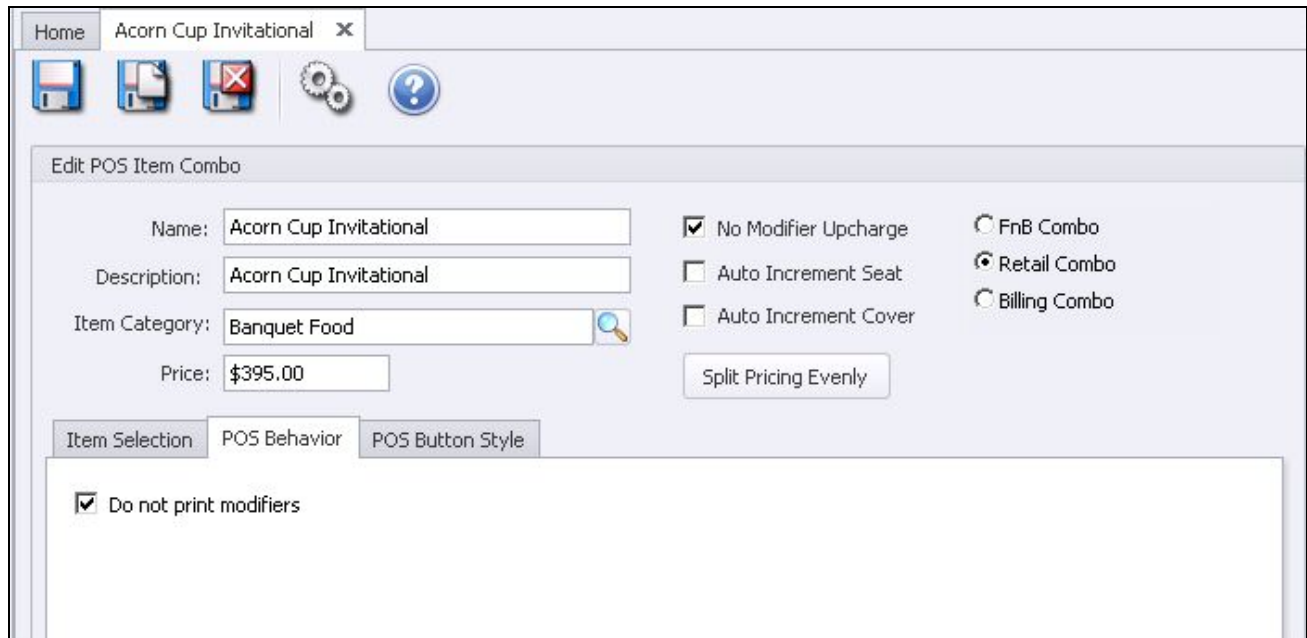
Use the **Up/Down** Arrows to rearrange the order the items are listed.



Selected Items

Move Up Move Down

POS Behavior Tab



Do **not** print modifiers:

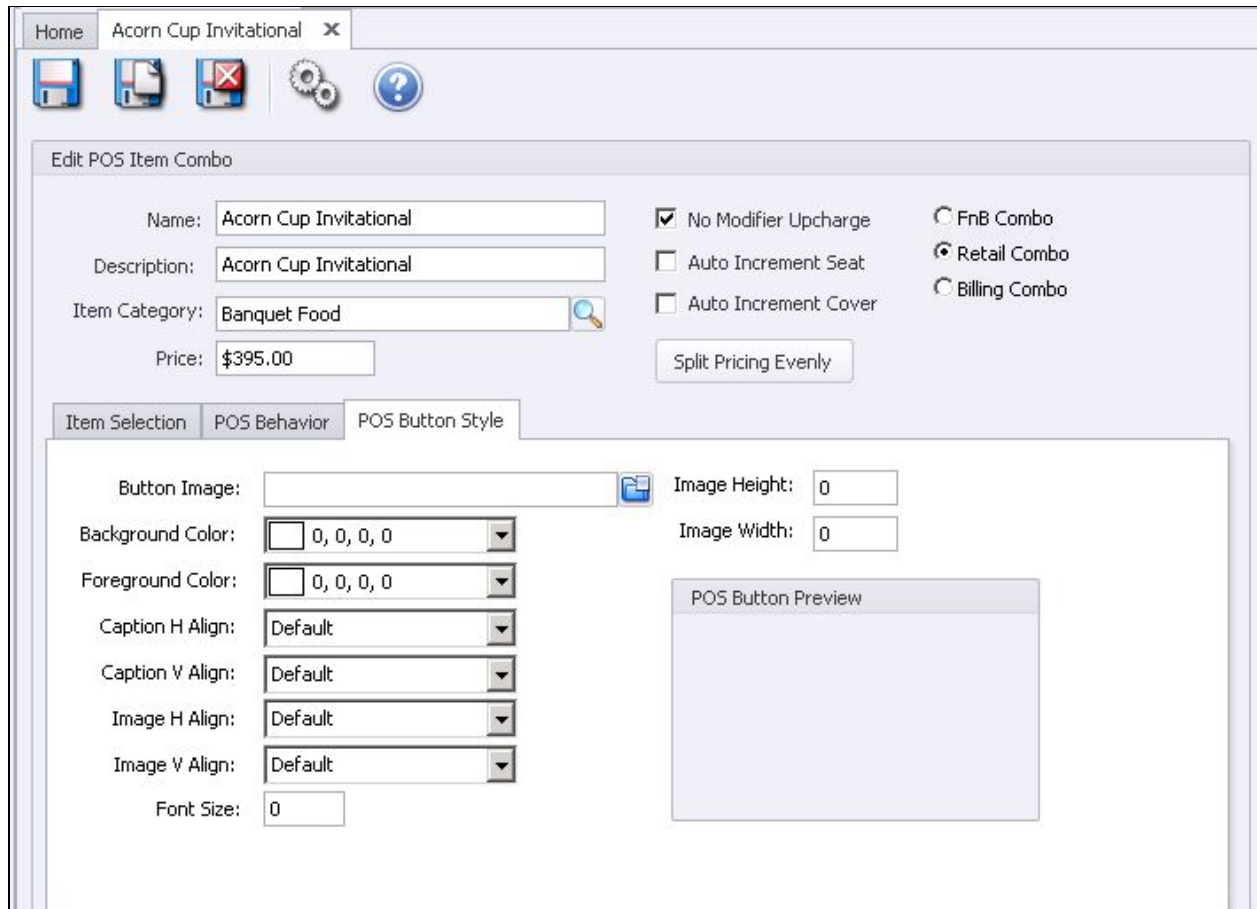
Check these fields if you do not want the itemized detail to print on the member receipt. If this field is checked it will only print the Combo Name on the member receipt.

Leave **Unchecked** if you want all items to print on the member receipt; it will print the **Combo Name** in addition to the **itemized detail**.

Please Note: *Billing Combos; this field does not apply and always show itemized detail.*

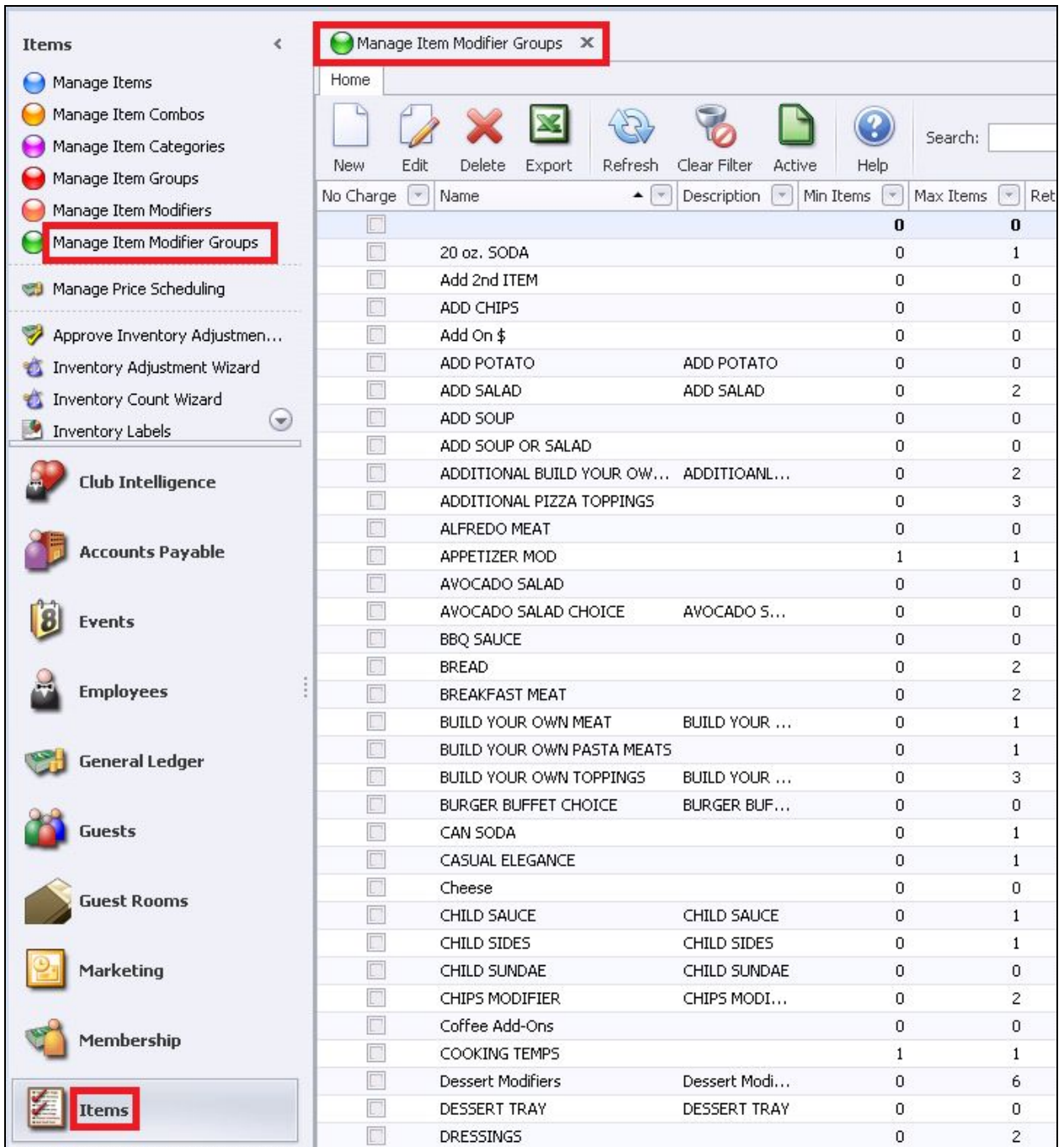
POS Button Style tab

Adjust the settings to change the bottom appearance (see [POS Button Style](#) for more instructions).



Manage Modifier Groups

If an item has choices or prep instructions you can add a modifier to the item setup; modifiers are added to a modifier group and attached to an item.



No Charge	Name	Description	Min Items	Max Items	Ret
<input type="checkbox"/>			0	0	
<input type="checkbox"/>	20 oz. SODA		0	1	
<input type="checkbox"/>	Add 2nd ITEM		0	0	
<input type="checkbox"/>	ADD CHIPS		0	0	
<input type="checkbox"/>	Add On \$		0	0	
<input type="checkbox"/>	ADD POTATO	ADD POTATO	0	0	
<input type="checkbox"/>	ADD SALAD	ADD SALAD	0	2	
<input type="checkbox"/>	ADD SOUP		0	0	
<input type="checkbox"/>	ADD SOUP OR SALAD		0	0	
<input type="checkbox"/>	ADDITIONAL BUILD YOUR OW...	ADDITIONAL...	0	2	
<input type="checkbox"/>	ADDITIONAL PIZZA TOPPINGS		0	3	
<input type="checkbox"/>	ALFREDO MEAT		0	0	
<input type="checkbox"/>	APPETIZER MOD		1	1	
<input type="checkbox"/>	AVOCADO SALAD		0	0	
<input type="checkbox"/>	AVOCADO SALAD CHOICE	AVOCADO S...	0	0	
<input type="checkbox"/>	BBQ SAUCE		0	0	
<input type="checkbox"/>	BREAD		0	2	
<input type="checkbox"/>	BREAKFAST MEAT		0	2	
<input type="checkbox"/>	BUILD YOUR OWN MEAT	BUILD YOUR ...	0	1	
<input type="checkbox"/>	BUILD YOUR OWN PASTA MEATS		0	1	
<input type="checkbox"/>	BUILD YOUR OWN TOPPINGS	BUILD YOUR ...	0	3	
<input type="checkbox"/>	BURGER BUFFET CHOICE	BURGER BUF...	0	0	
<input type="checkbox"/>	CAN SODA		0	1	
<input type="checkbox"/>	CASUAL ELEGANCE		0	1	
<input type="checkbox"/>	Cheese		0	0	
<input type="checkbox"/>	CHILD SAUCE	CHILD SAUCE	0	1	
<input type="checkbox"/>	CHILD SIDES	CHILD SIDES	0	1	
<input type="checkbox"/>	CHILD SUNDAE	CHILD SUNDAE	0	0	
<input type="checkbox"/>	CHIPS MODIFIER	CHIPS MODI...	0	2	
<input type="checkbox"/>	Coffee Add-Ons		0	0	
<input type="checkbox"/>	COOKING TEMPS		1	1	
<input type="checkbox"/>	Dessert Modifiers	Dessert Modi...	0	6	
<input type="checkbox"/>	DESSERT TRAY	DESSERT TRAY	0	0	
<input type="checkbox"/>	DRESSINGS		0	2	

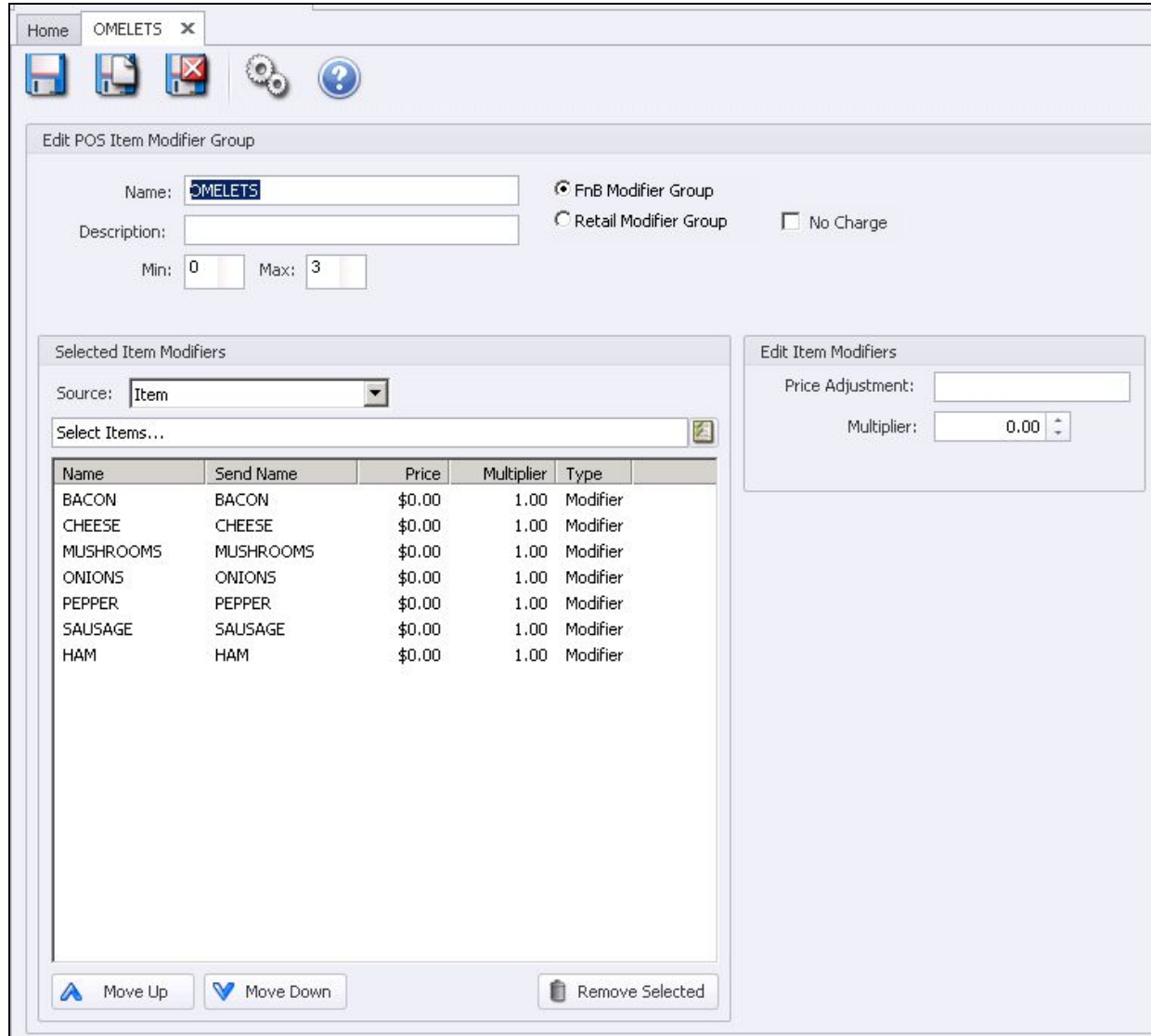
To **Edit** a Modifier:

Highlight the **Item** and double-click or select the **Edit** icon on the toolbar.

To **Create a New** Combo:

Click the **New** icon.

The **Item Modifier Group** maintenance screen will appear.



Home OMELETS

Edit POS Item Modifier Group

Name:

Description:

Min: Max:

FnB Modifier Group
 Retail Modifier Group
 No Charge

Selected Item Modifiers

Source:

Select Items...

Name	Send Name	Price	Multiplier	Type
BACON	BACON	\$0.00	1.00	Modifier
CHEESE	CHEESE	\$0.00	1.00	Modifier
MUSHROOMS	MUSHROOMS	\$0.00	1.00	Modifier
ONIONS	ONIONS	\$0.00	1.00	Modifier
PEPPER	PEPPER	\$0.00	1.00	Modifier
SAUSAGE	SAUSAGE	\$0.00	1.00	Modifier
HAM	HAM	\$0.00	1.00	Modifier

Edit Item Modifiers

Price Adjustment:

Multiplier:

Name

Give the Modifier Group a name.

Description

Additional description of the Modifier Group; this is optional for internal viewing only.

Min

Enter the minimum allowed to select from the group; if you enter 0 they are not required to order anything from the group and can move to the next order

if you enter 1 or more they will be forced to select from the group (number specified) before moving to the next order

Max

What is the maximum limit allowed to be ordered from the group?

Example 1: Meat Temperature might have both a Min and Max of 1; we can only select one temperature.

Example 2: Wings Sauce might have a Min 0 and Max 2; we can skip the screen if we don't want any sauce or choose up to 2 sauces. On the 2nd choice the system will move to the next order.

FnB Modifier Group

For FB POS items (modifiers are typically used for FB items).

Retail Modifier Group

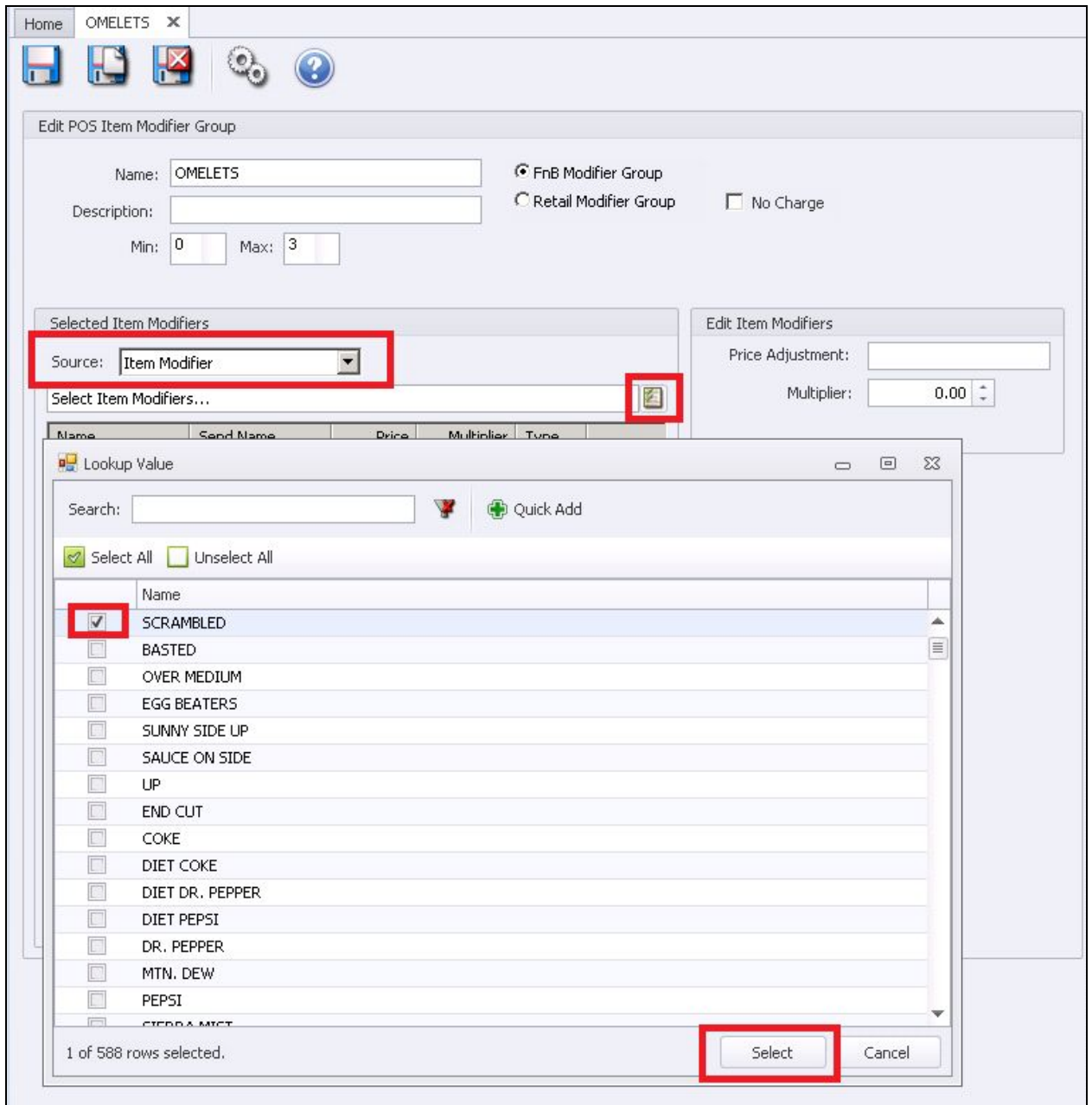
For Retail POS Items.

No Charge

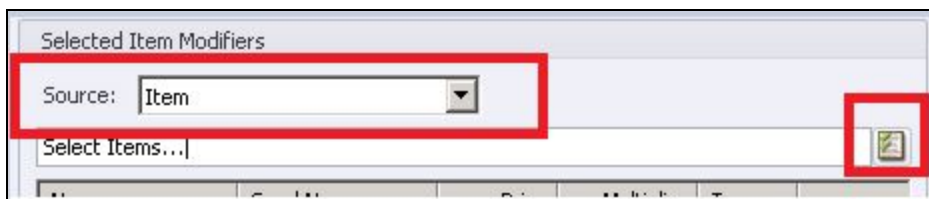
Will turn off the option to enter a price on the modifier.

Selected Item Modifiers

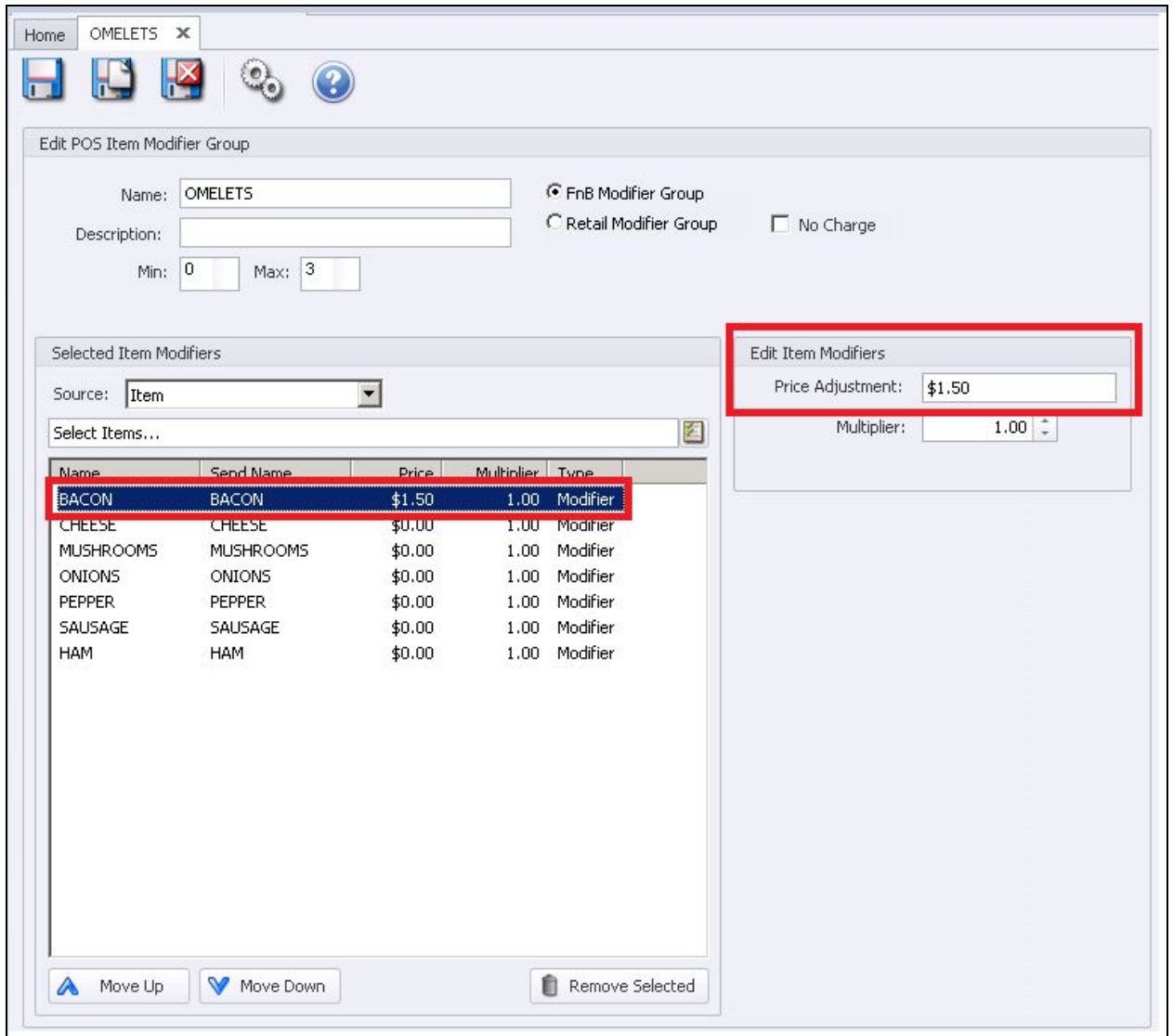
Click the **Select Item Modifiers Lookup** to get a list of available item modifiers. Click to select the modifier, and then click **Select** at the bottom of the **Lookup value**.



Items can also be added as a modifier. To do so, change the **Source** to Item and a list of available items will be displayed once the Lookup value is selected.

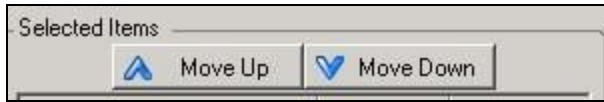


If a **price** is to be added to the Modifier Item, highlight the item and enter the price in the **Price Adjustment**.



Please Note: You can use Menu Items as modifiers and overwrite the item price using the **Price Adjustment**. If you need to add a **new** Menu Item click **Quick Add** within the Lookup Value (see [Manage Items](#) for more detail on adding needed item). If you want the Modifier to be added to the sales reports you will need to select from the Available Items.

If you select from the **Available Item Modifier**, modifiers are not included on the sales reports. Use the **Move Up/Down Arrows** to arrange the order of the modifiers.



Multiplier

The multiplier will adjust the price of the item based on the terms added. For instance, if a 2.0 multiplier is added for a "Double" liquor modifier the system would take the base drink price and multiply by 2.

The screenshot shows a POS system interface with two main windows. The top window, titled 'Ciroc', shows the 'Item Setup' for a drink named 'Ciroc'. The 'Retail Price' is set to \$5.50. The bottom window, titled 'LIQ. MIXERS', shows the 'Edit POS Item Modifier Group' for 'LIQ. MIXERS'. The 'Multiplier' is set to 2.00. A table of 'Selected Item Modifiers' is also visible, showing a 'Double' modifier with a multiplier of 2.00.

Name	Send Name	Price	Multiplier	Type
Double	Double	\$0.00	2.00	Modifier
ALREADY MADE	*ALREADY MADE*	\$0.00	1.00	Modifier
BLOODY MARY	BLOODY MARY	\$1.50	1.00	Modifier
BOOTLEG	BOOTLEG	\$1.00	1.00	Modifier

Subtotal: \$11.00
 Service Charge: \$1.87
 Tax: \$0.93
 Total: \$13.80

Assign the Modifier Group to an Item:

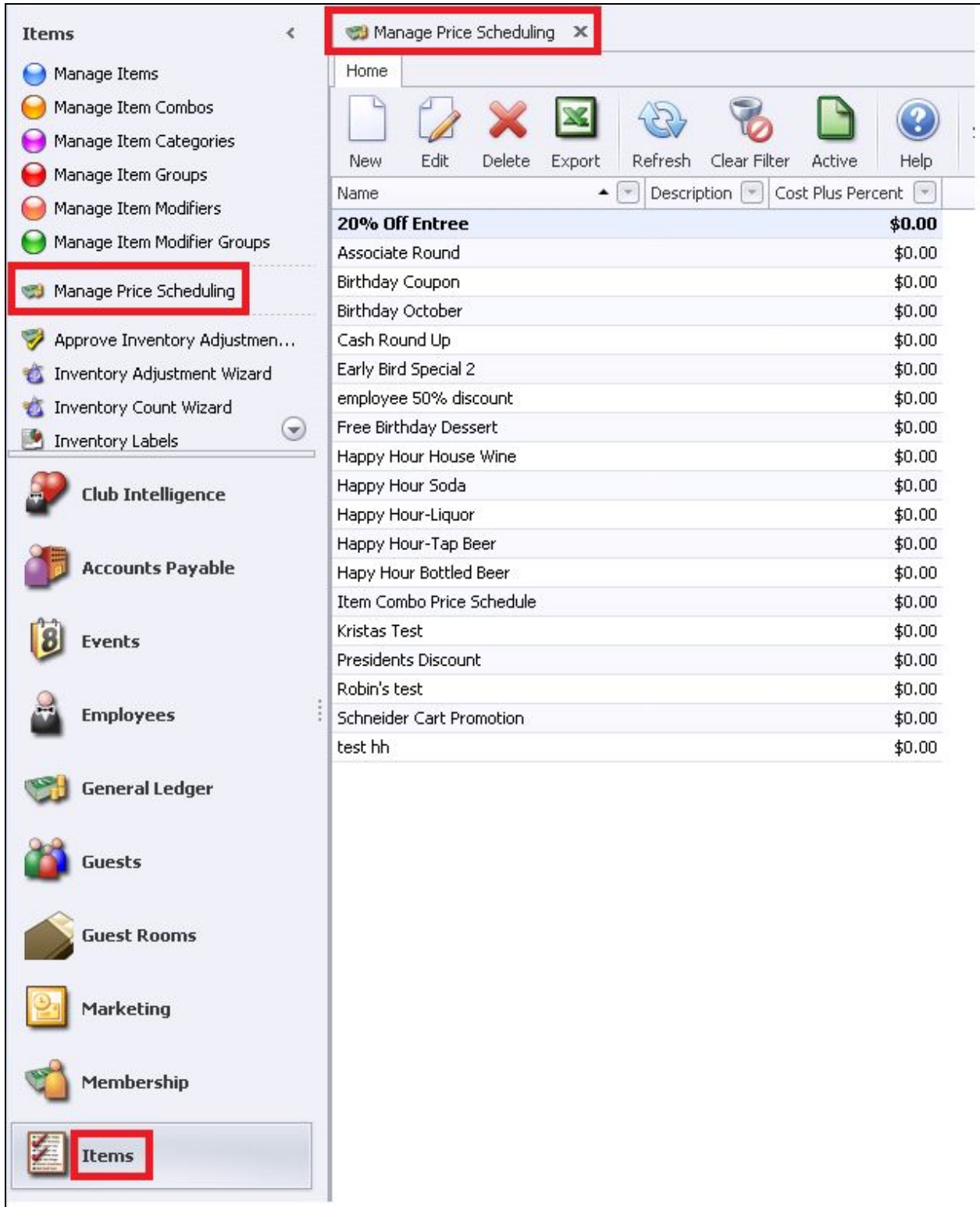
See [Manage F&B Items](#) then [Modifiers](#).

Manage Price Scheduling



Price Scheduling allows for the setup of various **automatic discounts** such as Specials Promos, Member Type discounts, Marketing Promos, Happy Hour discounts, Employee discounts, etc. The price schedule can be perpetual or a limited time offer.

Select **Items**, then **Manage Price Scheduling**.



The screenshot displays the 'Manage Price Scheduling' window. The left sidebar contains a list of items, with 'Manage Price Scheduling' highlighted. The main window shows a table of items with their respective prices, all set to \$0.00. The 'Edit' icon on the toolbar is highlighted.

Name	Description	Cost Plus Percent
20% Off Entree		\$0.00
Associate Round		\$0.00
Birthday Coupon		\$0.00
Birthday October		\$0.00
Cash Round Up		\$0.00
Early Bird Special 2		\$0.00
employee 50% discount		\$0.00
Free Birthday Dessert		\$0.00
Happy Hour House Wine		\$0.00
Happy Hour Soda		\$0.00
Happy Hour-Liquor		\$0.00
Happy Hour-Tap Beer		\$0.00
Hapy Hour Bottled Beer		\$0.00
Item Combo Price Schedule		\$0.00
Kristas Test		\$0.00
Presidents Discount		\$0.00
Robin's test		\$0.00
Schneider Cart Promotion		\$0.00
test hh		\$0.00

To **Edit** a Combo:

Highlight the **Item** and double-click or select the Edit icon on the toolbar.

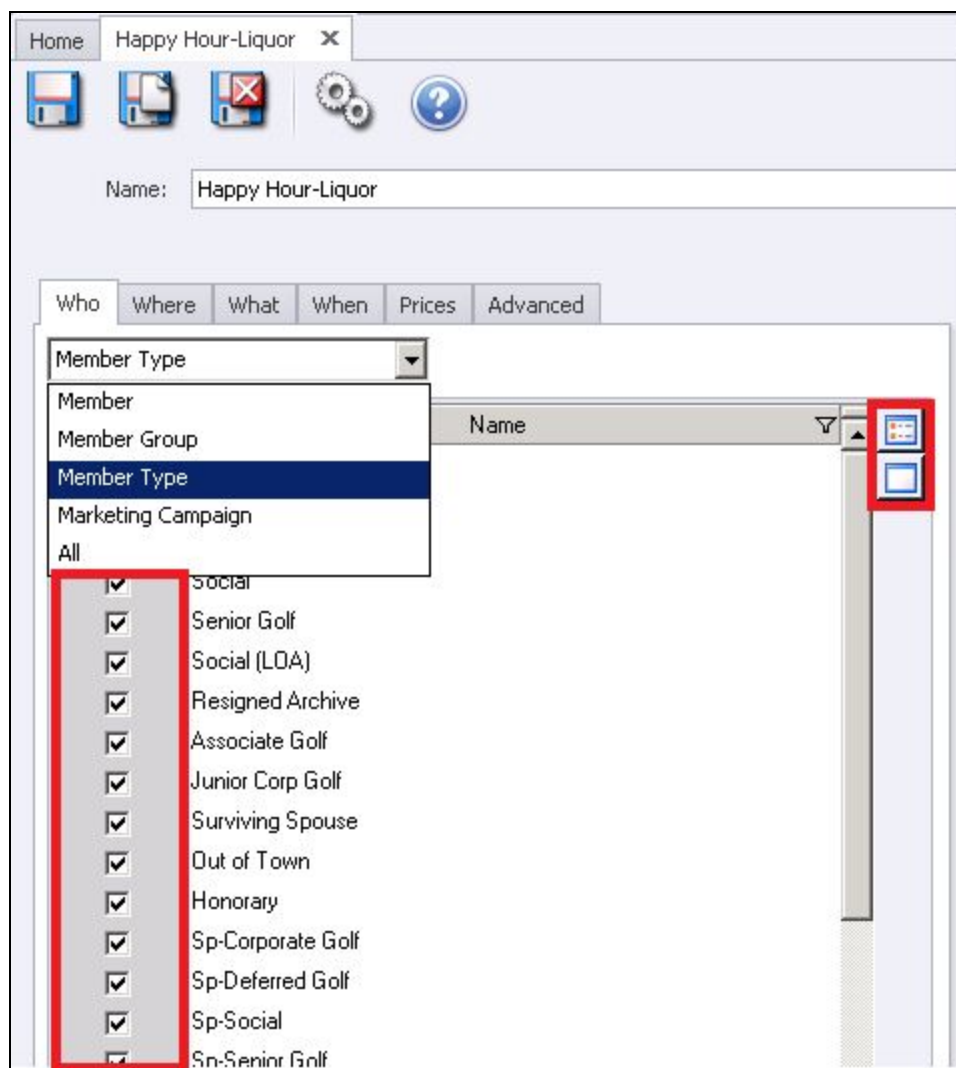
To **Create** a **New** Combo:

Click the **New** Icon.

The **Price Schedule** maintenance screen will appear. Enter a **Name** for the price schedule.

The **Who** tab:

Select the criteria for **who** will get the discount. Once you select from the **Who options**, select from the **detail** associated with the criteria.

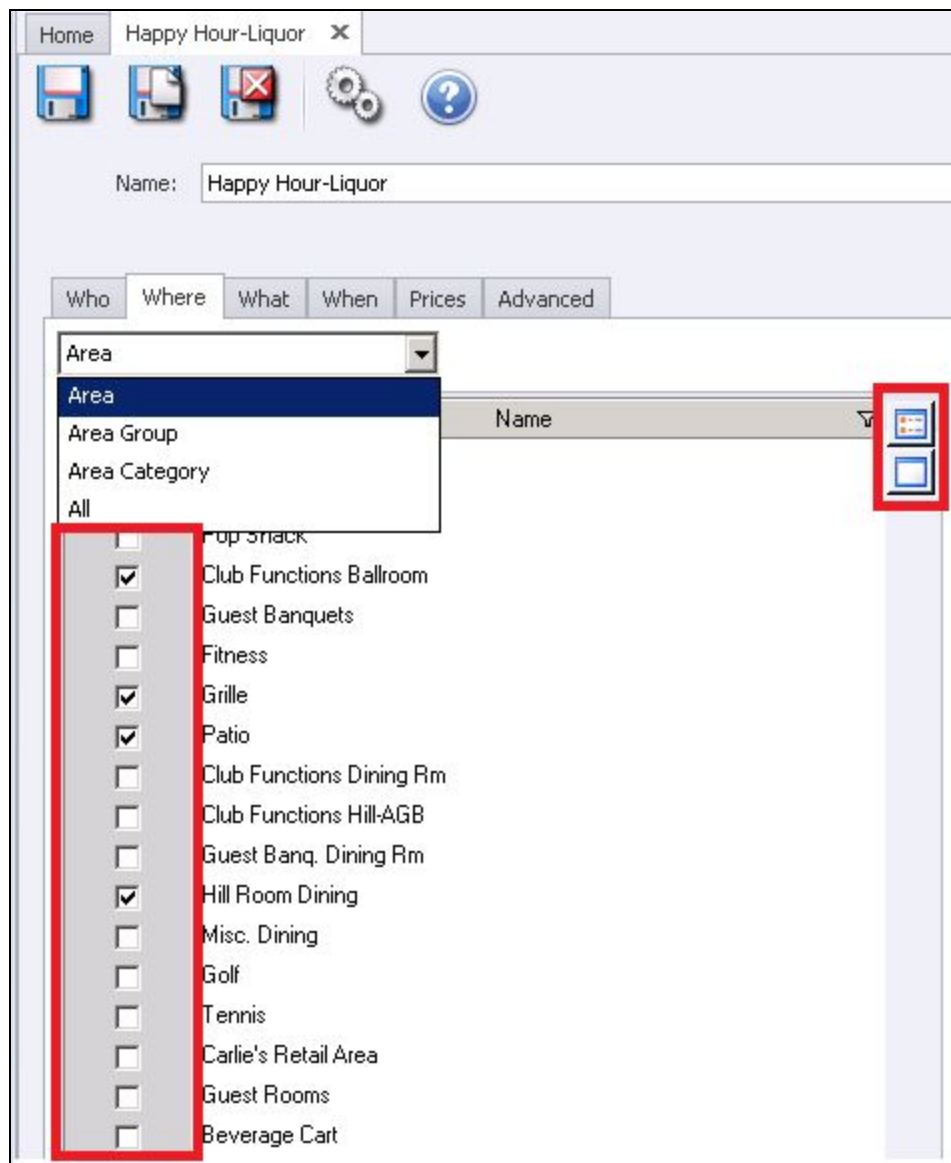


Please Note: The top button will select all and the bottom button will unselect all.



The **Where** Tab:

This tab allows parameters to be set on **where** in the club the discount can be applied. Once you select from the **Where** options, select from the detail associated with the criteria.

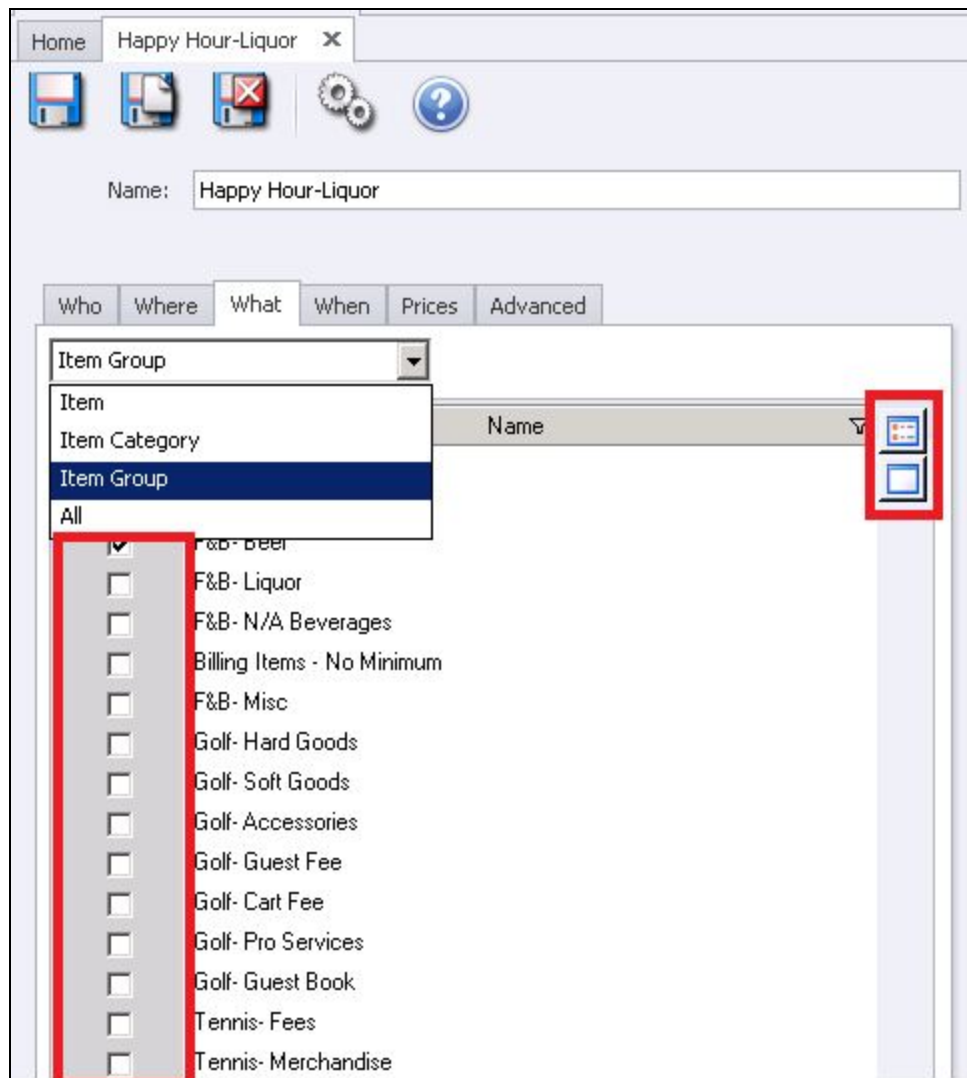


Please Note: The top button will select all and the bottom button will unselect all.



The **What** Tab:

This tab allows parameters to be set to determine what items are eligible for this discount to apply. Once you select from the **What** options, select from the detail associated with the criteria.

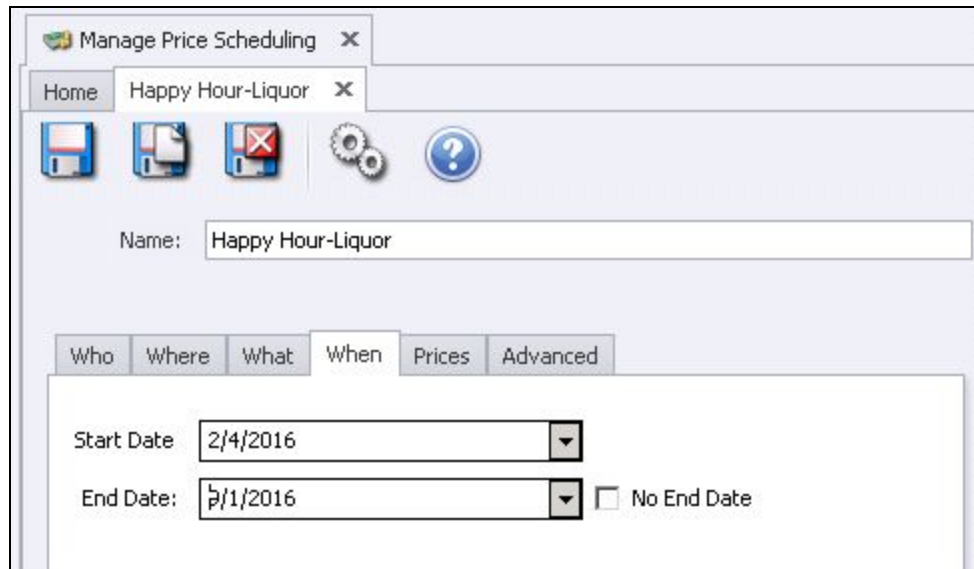


Please Note: The top button will select all and the bottom button will unselect all.



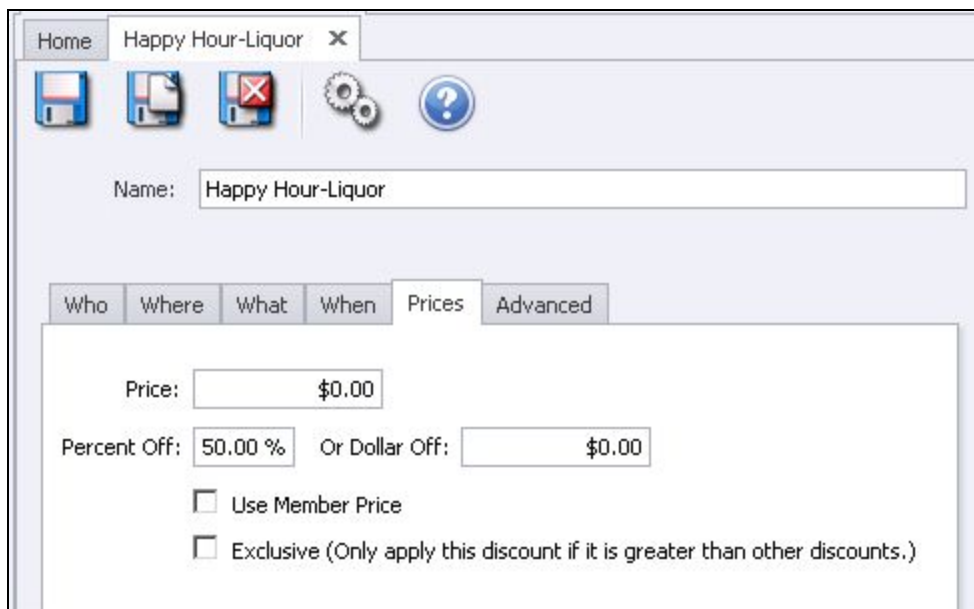
The **When** Tab:

This tab allows parameters to be set to determine what **date range** does the discount apply. Enter the **Start Date** and **End Date** or check **No End Date** if there is no end to the discount.



The **Price** Tab:

Enter here **how** the system will calculate the discount.



Price

Use this if all items are to have the same price. *Example:* All domestic beers are sold at \$1.00.

Percent Off

Use this if the items are to be discounted by a percentage.

Or Dollar Off

Use this if items are to be discounted by a flat amount. Example: subtract \$1.00 from item price.

Use Member Price

If the system is to use the Item Member Price; Example: if your club does not offer Member Price for all members then you can select from the Who tab which Member Types receive the Member price. The Member Type setup will not use member pricing.

Exclusive

If checked, the system will only apply this discount if it is greater than other discounts. This will prevent price schedules from conflicting if there is an overlap between their specified times of discount.

Advanced Tab:

Day(s) of the Week to Apply:

Select the days (or All) the discount will apply.

Round Up Options

Select the preferred rounding method.

When Schedule Applies

Enter the Start Time and End Time the discount applies.

Price Adjustment to Apply

System will look at the cost and apply the percent markup. Commonly used in Retail shops for Employee discounts such as cost +10 percent. This will not work if the Item does not have an associated cost.

Common Questions and Concerns

Q: When managing my Items I am having trouble with Grids, where can I find more information to guide me?

A: Grid information is located in the Client Resource Center [here](#).

Q: I need Items within a specific Item Category to use a different Tax Code than the Tax Code used at the Item Group level. How do I accomplish this?

A: Utilize the **Override Item Group** option within the Item Category. This will allow the user to override the Tax Code used at the Item Group level, and only have the Tax Code apply to Items within the Item Category.

Q: When I select an Item Category Button in POS, how do I rearrange the order the Item Buttons shown within the Category?

A: Use the **Move Up/ Move Down** options on the Item Selection tab of the Item Category.

Q: How is the GL posting of an Item Combo determined?

A: If there is no GL Account select within the Overrides section, the system will use the rules set on the specific Items within the Combo to determine the GL Posting. The Item Category selected on the Item Combo does **NOT** determine the GL Posting.

Q: I have a specific Item that will not apply toward Credit Book. Why?

A: Any Item intended to be redeemable by Credit Book must be flagged as **Credit Book Eligible** within the Item's setup.

Q: How do I edit the size and color of the Item Buttons within an Item Category Button at the POS?

A: Navigate to the **POS Item Button Style Tab** within the Item Category and specify the appropriate size and color. Changes made on this tab will only affect the Items Buttons within the Category, not the Item Category Button.

Best Practices

- Each Area can have different Account allocations by highlighting the Area name and entering the accounts.
- The **Tax and Service Charge** percentages are determined by either the **Item Category** or **Item Group** (not the Item level).
- Item overrides the category and group settings.
- The Category can override the Group settings (**only** if the Override Group Settings is checked).
- The Group settings will be used if there is no override on the Item or Category setting.
- The Item level allows a cost dollar; if you have a percentage on the category level the Item cost dollar will override the category cost percent.
- The Grid that displays will vary from user to user; if the user is only allowed to see Retail items they will not see FNB or Billing Items.
- You can customize your grid to display different columns. To do so, right click anywhere on the grid and select Customize Columns. A list of Columns will appear and can be added to the grid by simply double clicking or dragging and dropping the column in question. The columns available will vary by module.
- For more information on grids, please click [Here](#) to navigate to our Client Facing Knowledge Base. Grids can be found under the Interactive Reports Module.
- Within reports you can click on the column heading to sort by any column or use the funnels to filter the information listed.
- Another way to change the Item's Category: Go to the Manage Items module and change within the item itself.