⬡ Office - 8.27.18 Release

User Guide - Table of Contents
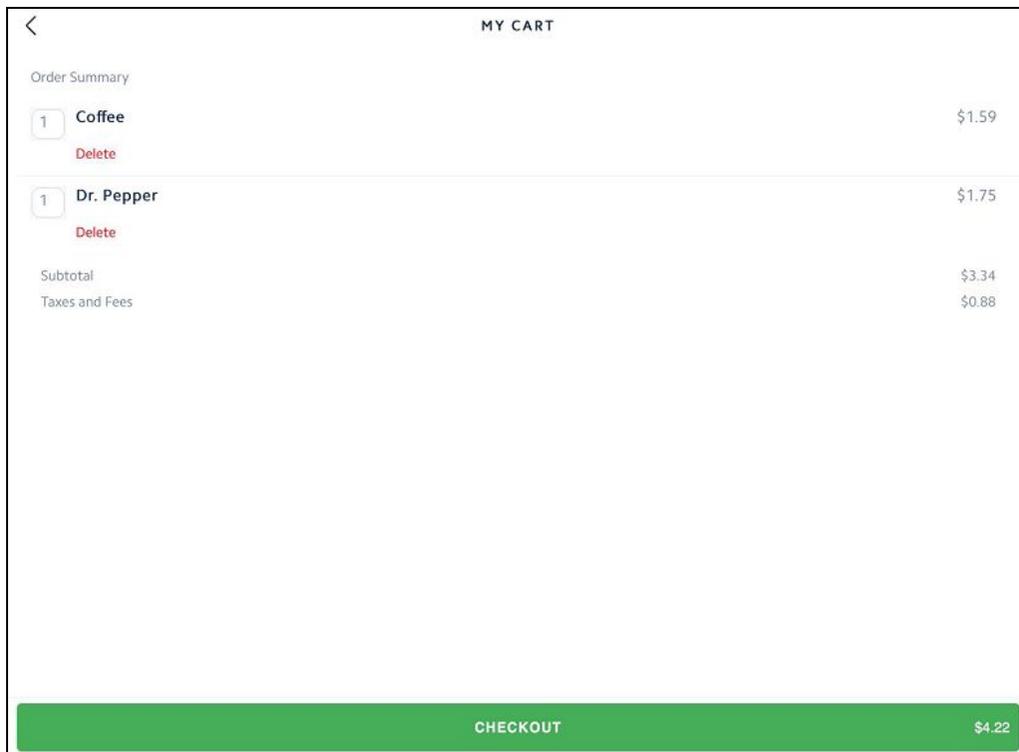
Enhancements

Mobile Ordering - Design Enhancements

- **Enhanced User experience by redesigning Mobile Ordering including updated fonts, colors, styling, and improved page transitions.**

Not yet using Mobile Ordering? Learn more at our upcoming webinar September 26th.

[Click here to register](#)!

Guest Rooms - Dashboard Summary

- **Add Restricted block types to the Dashboard Summary report.**

  Use Case: Previously, when running the Guest Rooms Dashboard Summary report, blocks categorized as **Restricted** were not highlighted on the report.

  Now, when rooms are blocked with a Restricted status as shown here:

  Restricted Status displays on the Dashboard Summary report.

Interactive Reporting - Data Genie - Multi-Company Clubs

●   **Added the ability to have Master aggregate database for parent reporting, while maintaining reporting at the individual club level.**

Use Case: A club with multiple companies/databases can now aggregate all of their data within one database for reporting purposes, however, can still limit reporting views at the company level for those who should not have access to view the aggregated data.
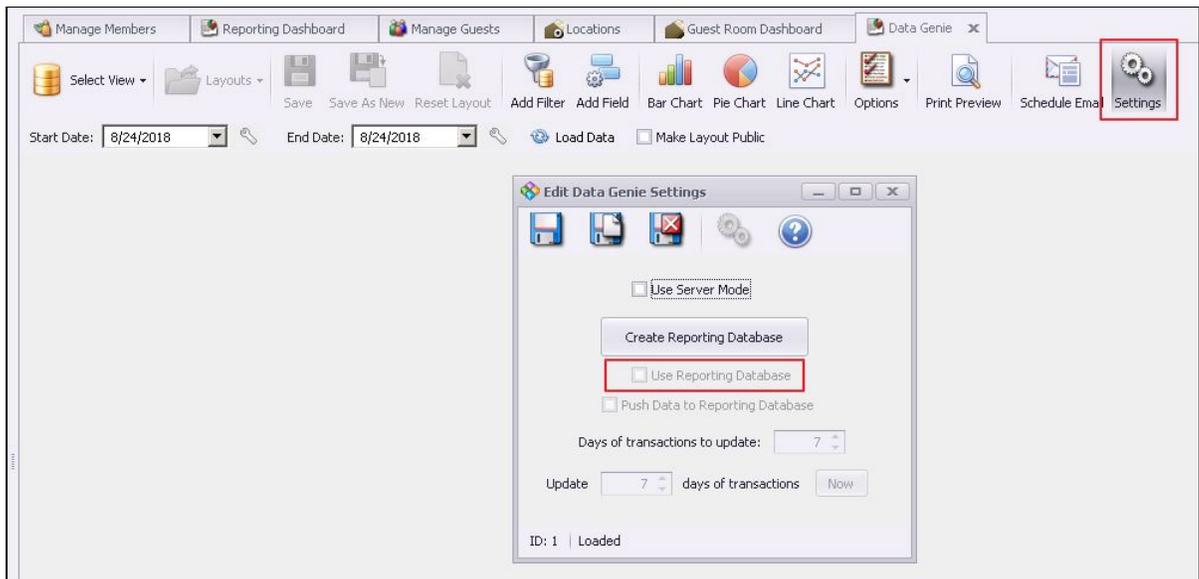
**Please Note**: This configuration needs to be setup by your Clubessential Team. Please reach out for more information.

Items - Multi-Edit Addition

●   **Enhanced User experience by adding Multi-Edit support for the Dues Type column within the Manage Items Grid.**

Use Case: The Multi Edit function allows for easy editing of multiple records at one time. This feature has now been enabled for the Dues Type Item field.
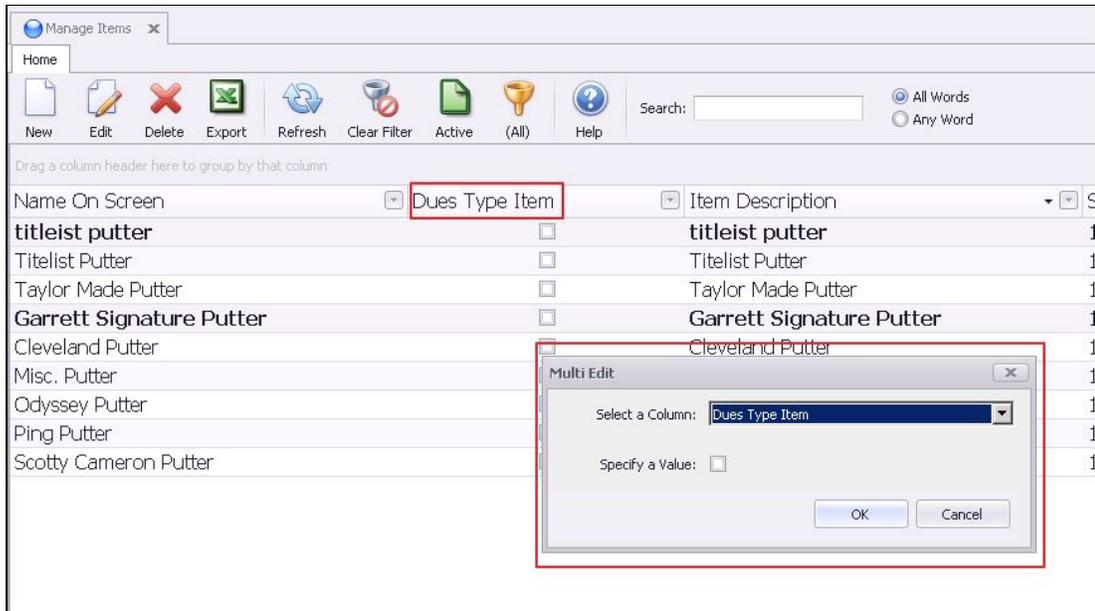
Membership

Member Charge Wizard

- **Enhanced User experience by being able to store User preference to include dependents within the Member Charge Wizard.**
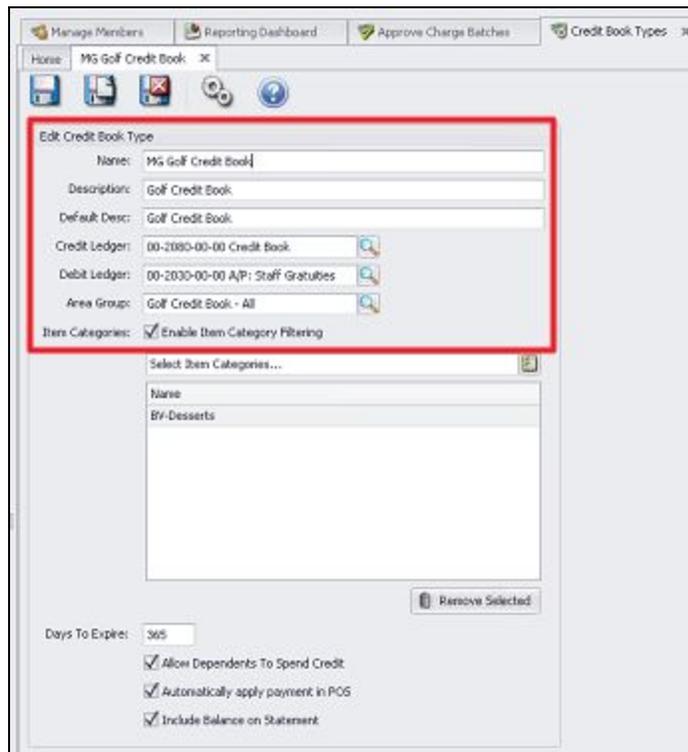
    Use Case: Previously, if this setting was checked, it would not remain checked when running the Member Charge Wizard the next time. Now, system remembers whether this was previously checked, and will auto-default to previous selection.
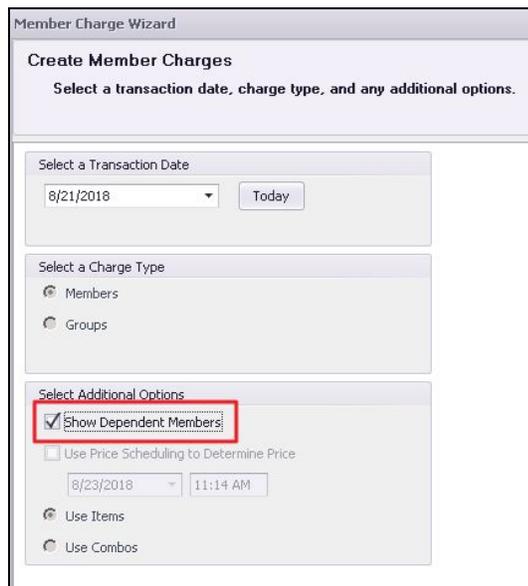
Credit Book

● **Updated security restrictions for Credit Book Types to now use the Area Group on the Credit Book Type instead of the Credit/Debit department.**

Use Case: Previously, Clubs had to provide Balance Sheet department access to employees issuing credit book. To enhance security around the balance sheet, an employee now only needs access to one of the areas in the area group set on the credit book type in order to choose it in the credit book wizard, rather than access to the credit/debit ledger department.

Member Statements - Email Template

● **Added functionality to include Statement Name Field as an option when creating the email template for Member Statements.**

Use Case: The **Statement Name** snippet would be especially useful in email greetings on monthly statements.
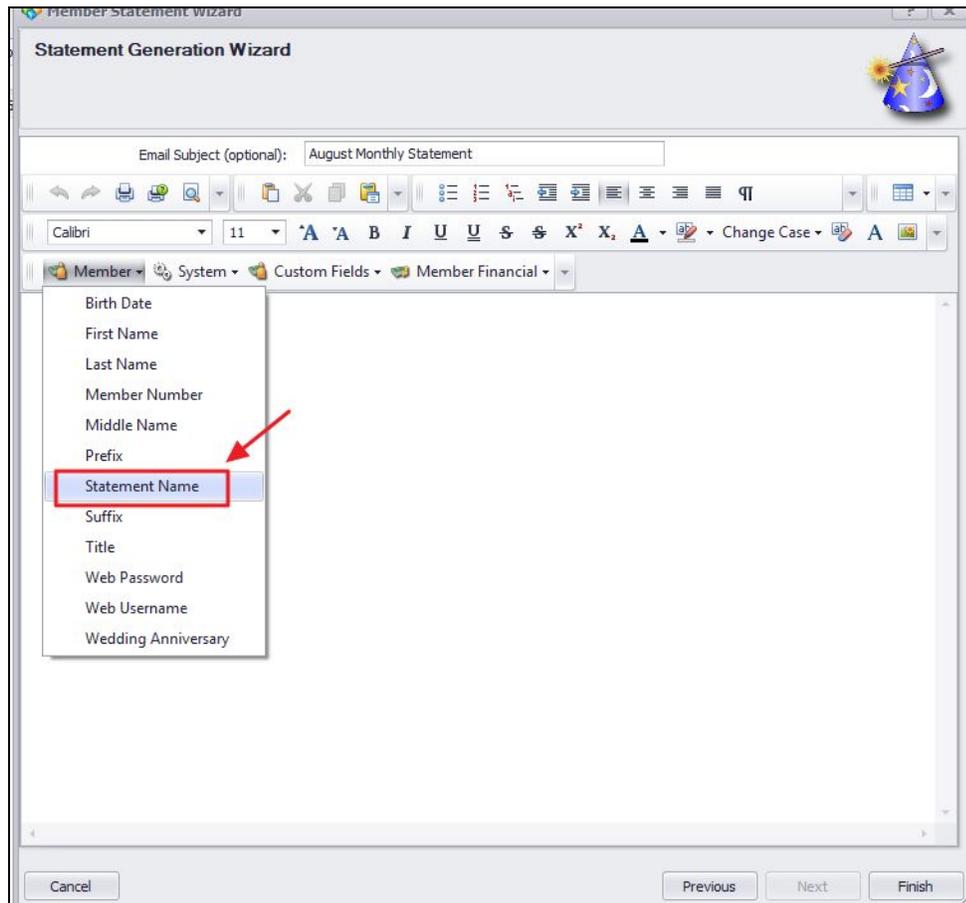
Member Statements - Performance Enhancement

● **Improved system performance when calculating a Member's Credit Book Balance to display on the Member Statement.**

Use Case: Previously, spooling process when generating member statements could be extremely lengthy. Due to this improvement, statement generation process performance is improved.
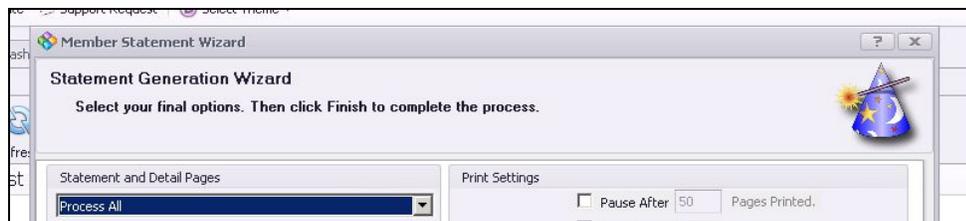
System Settings

Guest Room - Folios

- **Added ability to customize the start and end time of reservations, which dictate when Folios are available for settlement in the Classic POS.**

    Use Case: Previously, guest room folios became 'Active' for settlement charging in the POS at 12:01 AM on the day of arrival and 'Inactive' at 11:59 PM Day of departure. With this setting enabled, Clubs can now set times in alignment with their check-in and check-out times (rather than the default times) that they would like folios available for settlement.
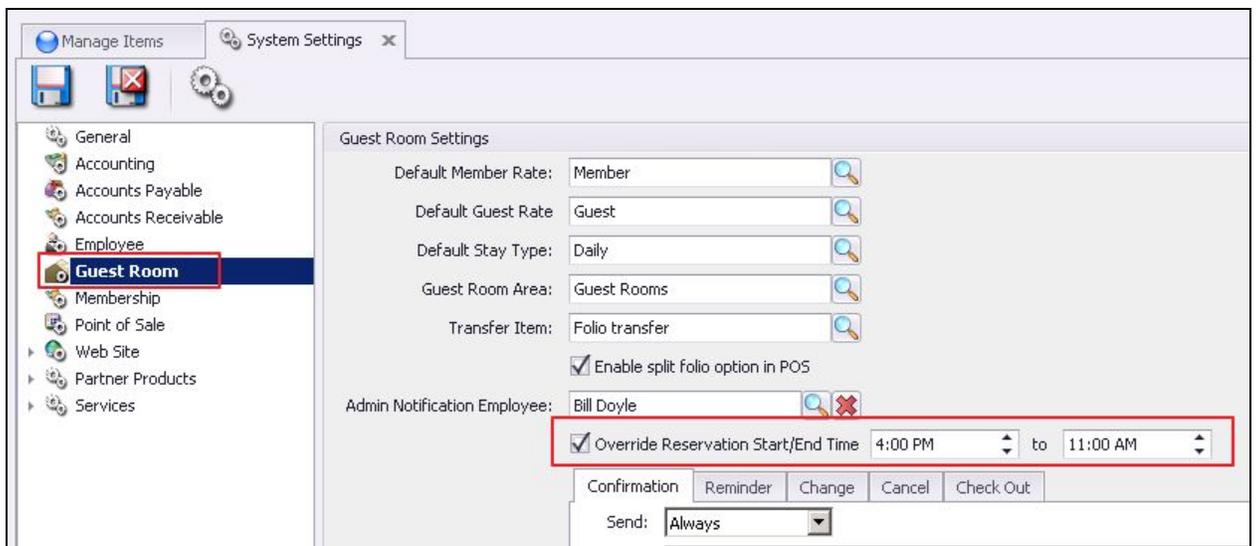
Inventory - Items

- **Added a button to the Qty On Hand field that will allow Users to immediately recalculate the items on hand.**

    Use Case: Previously, users could refresh the Manage Items Grid where it would pull Item data from the database. Now, Users can select the new **Qty on Hand** button within the Item; the system will evaluate all transactions and immediately calculate the number of that Item on hand.
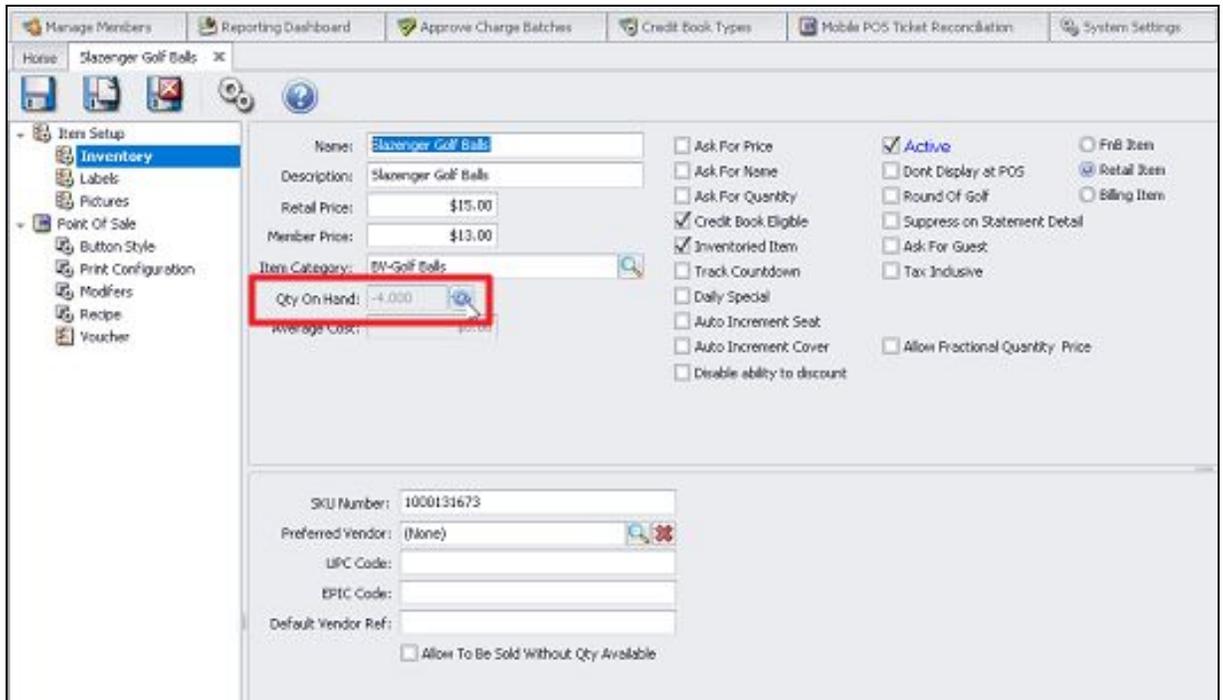
Banquets/ReServe Cloud

- **For Clubs using Banquets/Reserve - added additional warning message when attempting to save changes to the Club Display Name.**

    Use Case: Previously, if users changed the Club Display name in CMA without also updating the Club Display Name in Banquets/ReServe Cloud, the interface between the products could malfunction. This warning message provides a reminder to users that if they are changing the display name in CMA, they must also change it in Banquets/ReServe Cloud.

    Please Note: This process only affects those Users on Banquets/ReServe Cloud.
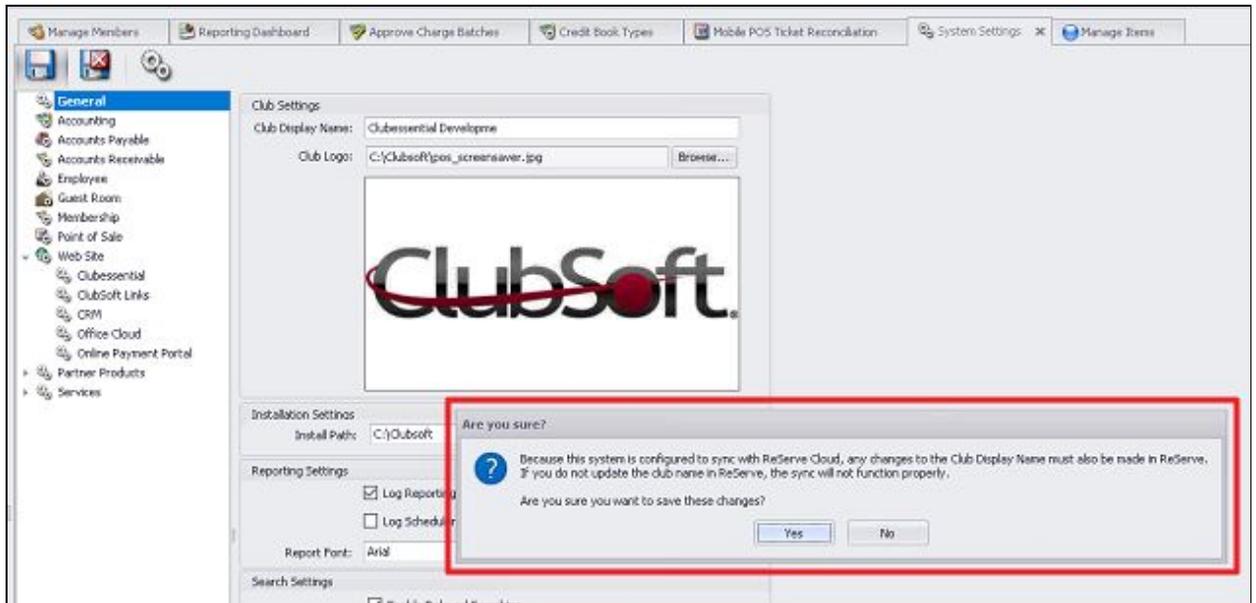
Update Process for Hosted Clients

- **Improved User experience for Hosted clients when an update is available for Classic Office.**

  Use Case: Beginning with the next release, CMA/POS will automatically exit five minutes after displaying the "Update Available" message. Previously, some users were unable to view the message and/or click to continue and therefore had to connect with support to receive the latest update. This will take effect in the next update cycle (not the current one) as code has been deployed in this release that will then apply to the next release cycle.
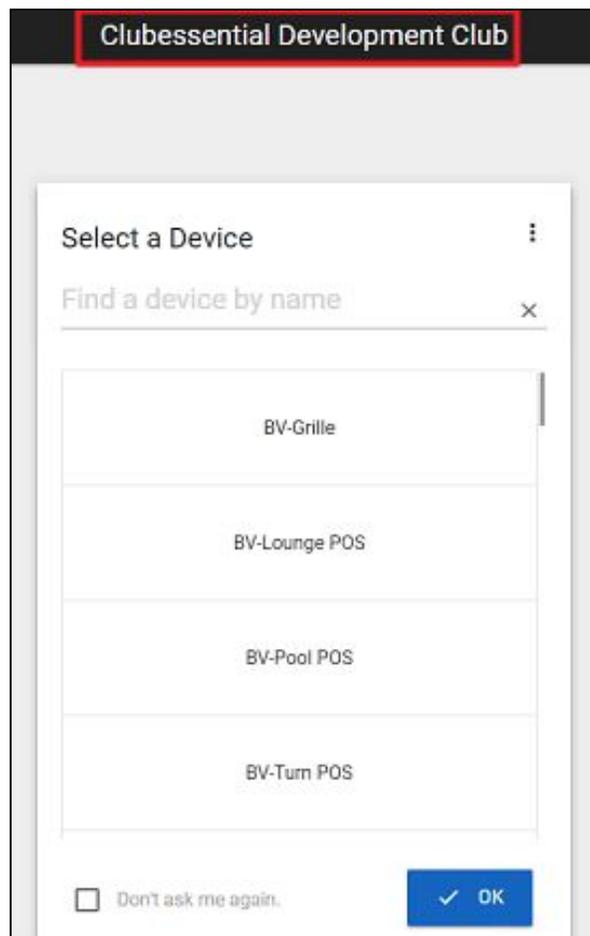
Mobile POS (Pilot Clubs Only)

Please Note: These changes only affect Clients **piloting the Mobile POS program**.

Device Selection

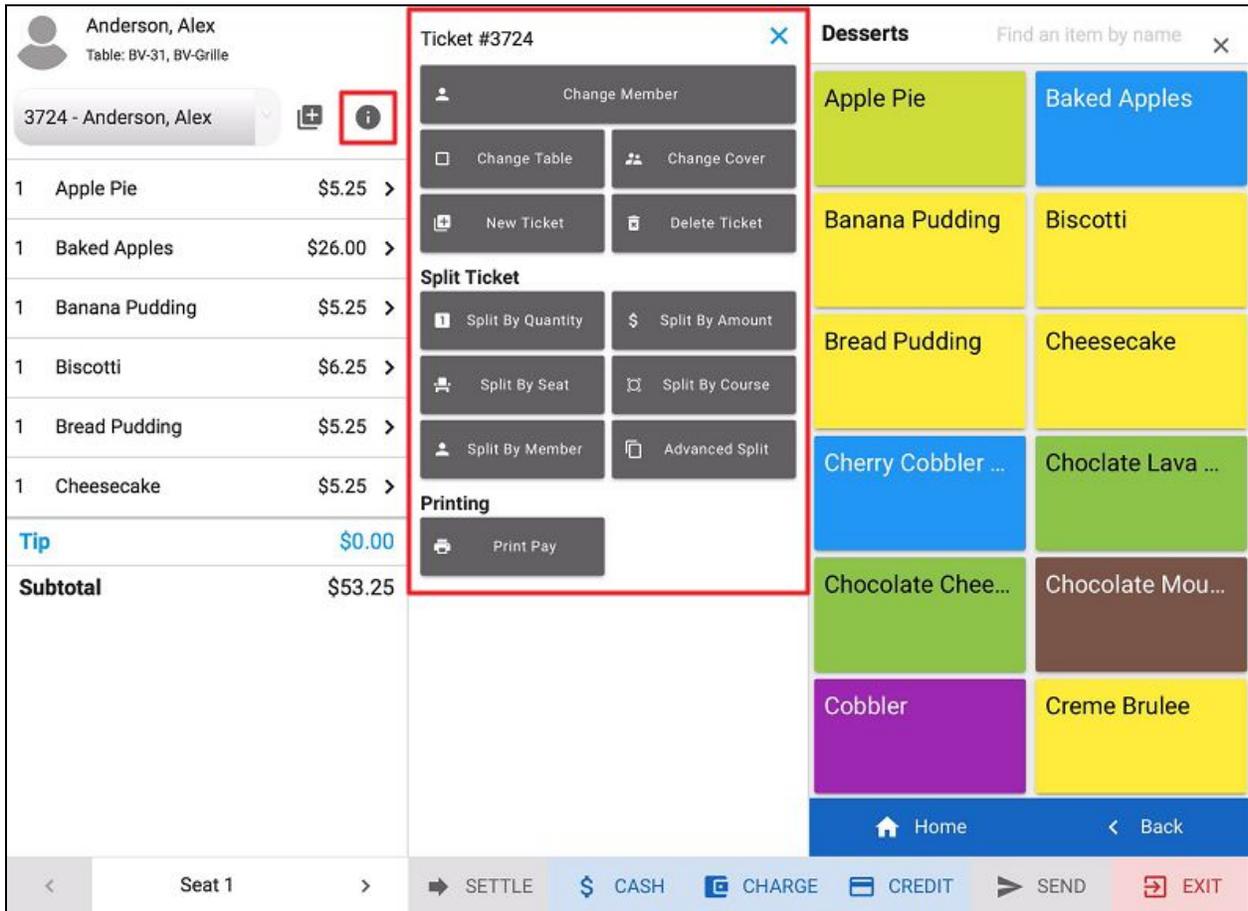- **Updated to display Club Name on the Mobile POS Device Selection page.**

   Use Case: Useful for multi-club operations, now easily view current Club name from the Mobile POS program.

Settlement and Split Ticket Functions

- **Added menus to support full Settle page support to Mobile POS, along with Split Payments.**

  Use Case: Mobile POS now features a fly out menu that allows for any Settle option to be selected from the Information icon (the lowercase i). When selected this menu will allow Users to access any options from the Settle menu as well as Split ticket menu, as seen below. As noted below, split by seat, course, member, amount, and quantity quick buttons are now available here.
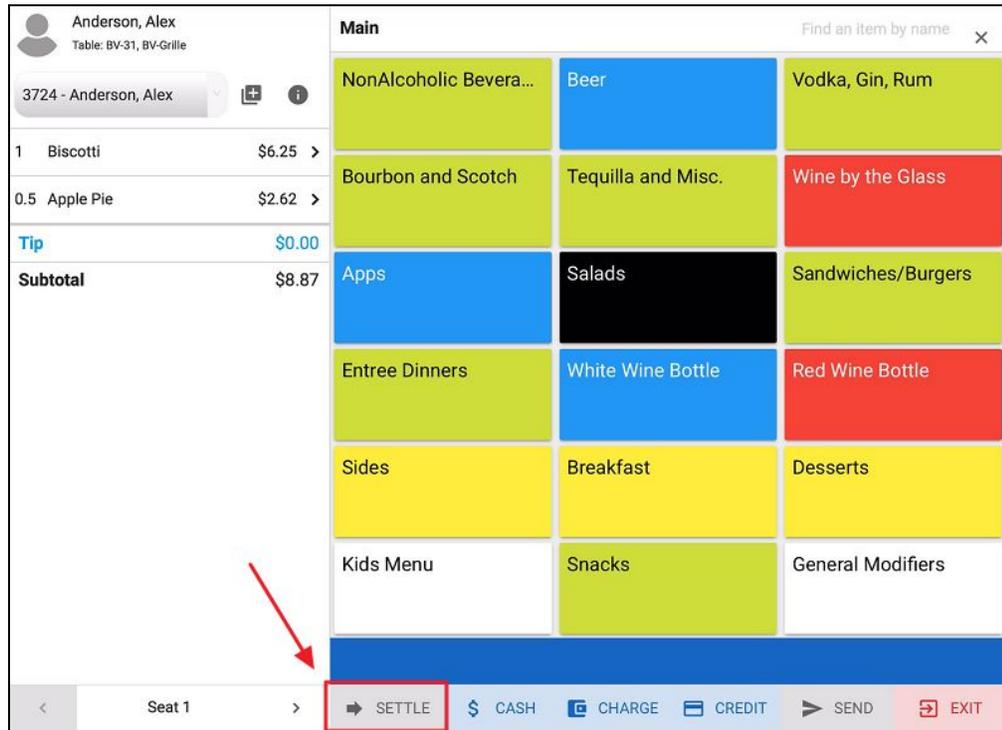
Additionally, the full Settlement screen (and options) can be accessed from the Settle link at the bottom of the POS screen.

Users can select any Settle type or combination of different Settle types and adjustments to finalize the ticket.
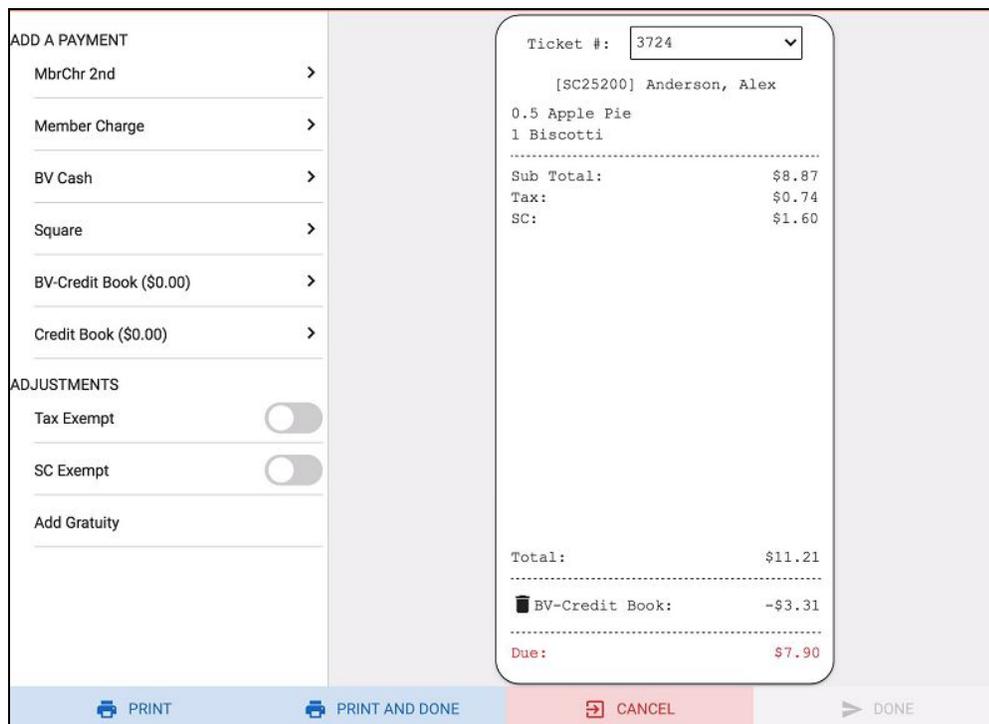
Advanced Split Ticket

- **Added ability, when in the Information Menu, to offer advanced splitting options.**

  Use Case: As currently available in Classic POS, Mobile POS now allows Users to perform advanced ticket splitting functions. Once selected, the Advanced Split menu provides options to change the member, split and/or move individual items, and split tickets by dollar amount, seat, course or Member, as seen below.

Ticket Sync to CMA

- **Added functionality to the Ticket sync process between Mobile POS and CMA by allowing invoices to be created immediately.**

  Use Case: Previously, once an Invoice was generated in CMA, the ticket could no longer be opened in Mobile POS without deleting it entirely from CMA. Now, invoices are created immediately and can be reopened until the Invoice is posted.

Please Note: When attempting to post an invoice batch, the system will ensure that all tickets that have been reopened, resettled, or deleted in Mobile POS are consistent with invoices in CMA.

In conjunction with the improved sync, additional ticket viewing/maintenance can now be performed using the **Mobile POS Ticket Reconciliation** within CMA (found under the POS tab).
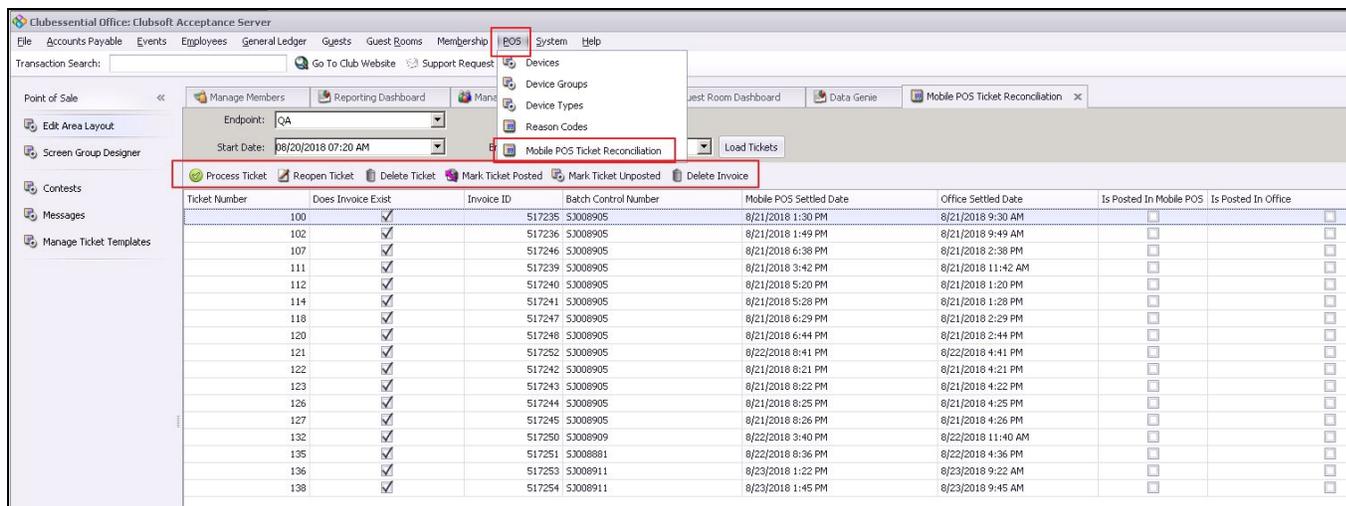
Bug Fixes

- Fixed an issue where users were able to pay for an item with credit book even though the credit book type was not configured to use that item's category.

- Fixed an issue where classic POS would sometimes ignore negative credit book issued to a member when calculating the eligible total.

- Fixed an issue where in specific unique circumstances, members were charged twice for a ticket when paying with credit card.

- Fixed an issue with clubs that use quarterly minimums and on the last day of the quarter, minimum amounts would display as all $0 on tickets.

- Fixed an error that occasionally appeared when loading the Check-In tab in classic POS.

- Fixed an issue preventing proper splitting of tickets between occupants when settling a classic POS ticket to folio with multiple occupants.

- Fixed an issue that occurred when trying to repost an edited Journal batch with a deleted row.

- Fixed an issue when syncing guest rooms with Availability Online where rooms reserved in CMA would show up as available on the website.

- Fixed an issue in the Journal Entry Wizard where rows could sometimes not be deleted.

- Fixed an issue where the guest room Dashboard Summary report was not showing all reservations.

- Fixed an issue with the Vendor Activity report not running properly when trying to use a saved layout.

- Fixed an issue in the Installment Billing report when the installment billing months would wrap around to another year.

- Fixed an issue where employees with the Manage Employee Schedules role were unable to create/edit/delete employee schedules.

- Fixed an issue where the Sales Forecast report was including deleted guest rooms.

Mobile POS Pilot Clients Only

- Updated the Invoice Editor in CMA to no longer show the "Edit Ticket in POS" button for Mobile POS tickets if the invoice was posted.

- Fixed an issue where Mobile POS was improperly making an entire ticket tax exempt, when one of the items should have been taxable.