Office - 9.24.18 Release

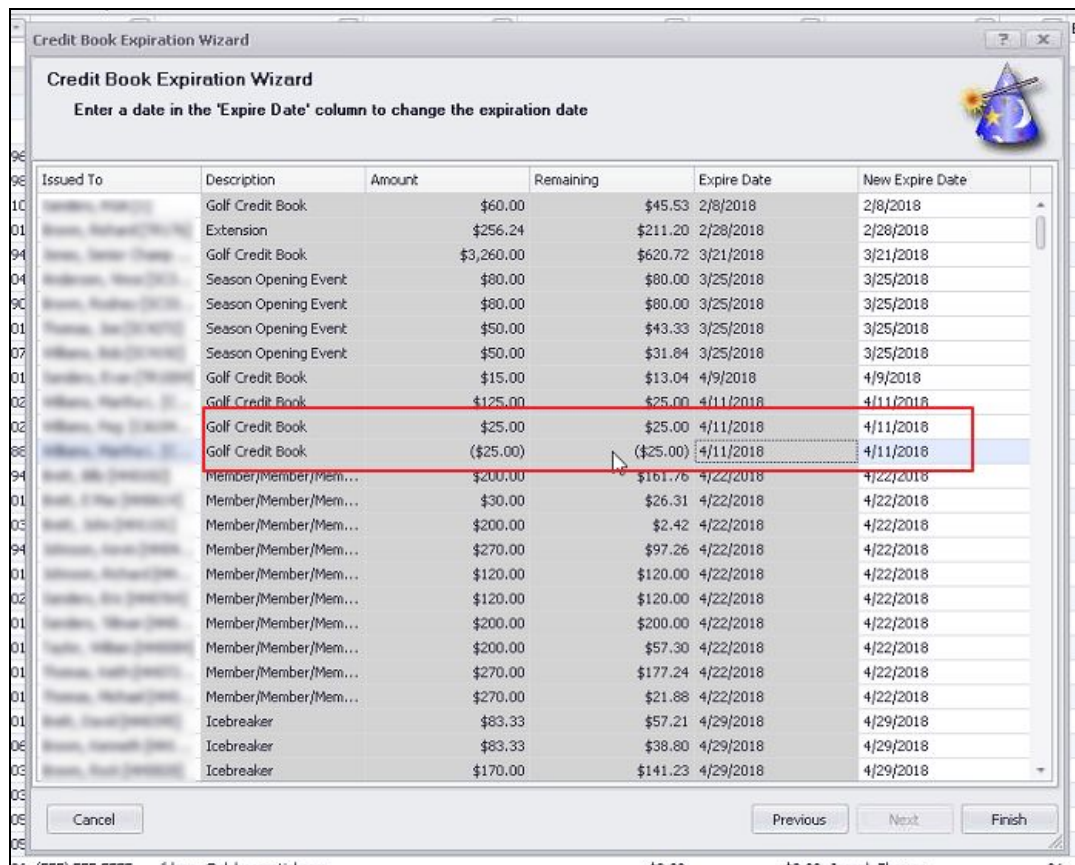## User Guide - Table of Contents

Enhancements

Credit Book - Expiration Wizard

- **Enhanced Credit Book Expiration process by giving Users the ability to Expire Negative Credit Books.**

  Use Case: Approximately a year ago, the Credit Book Expiration Wizard was introduced, eliminating the ability to issue negative credit book (which was sometimes using to offset positive credit book balances). Since then, however, eliminating aged negative credit book balances has been a challenge. With this enhancement, Clubs looking to reconcile and clean up their offsetting Credit Book balances in Office have the ability to expire negative credit book (as well as positive credit book). Once expired, Credit Books will no longer populate in the Credit Book Expiration Wizard as active.

Please Note: _Best Practice is to adjust the expiration date, and expire both the positive and negative offsetting credit book balances at the same time._
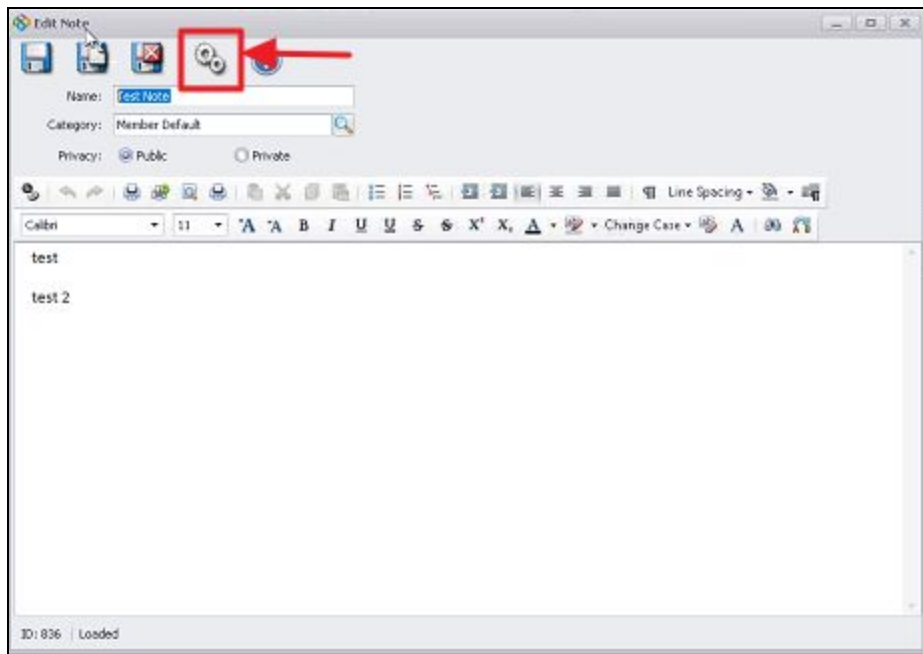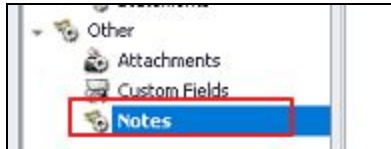
Notes - Change Log

- **Enhanced User experience by adding a Change Log for any area that allows Notes**.

   Use Case: Previously, when any Notes section (available in Members, Vendors, Guests, etc.) was edited (including making a note Public or Private), no log of changes was available. Now, Users can view **who** changed the note and **when** they did so, in the newly added Change Log.

Mobile POS (Pilot Clubs Only)

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

Inventory Support

- **For Inventoried Items, enhanced User experience by showing a warning when attempting to sell an Item with zero quantity in inventory, and preventing sale of item where permissions are not sufficient.**

   *Use Case***:** In Mobile POS, a User is processing a sale of a new golf club, with an inventory of zero. Within the transaction, User will receive a warning message "[Item] does not have sufficient inventory. Do you still want to sell the item?". Now, within Mobile POS the User with the correct security level can select **OK**, enter their credentials, and the sale can be processed.

   Please Note: *The warning message will only populate when "Allow Item to be Sold without Quantity Available" is NOT checked in CMA.*
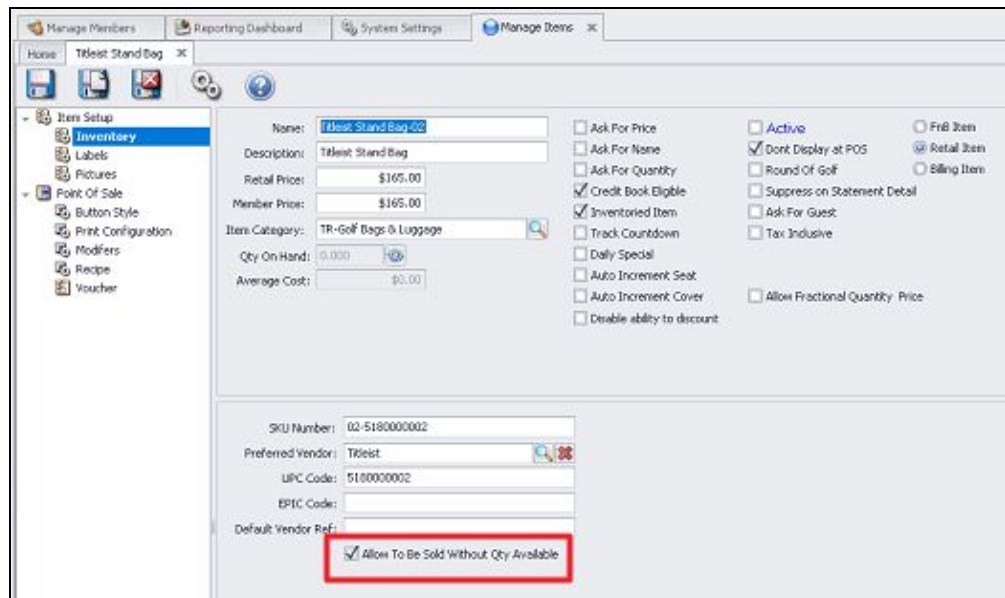
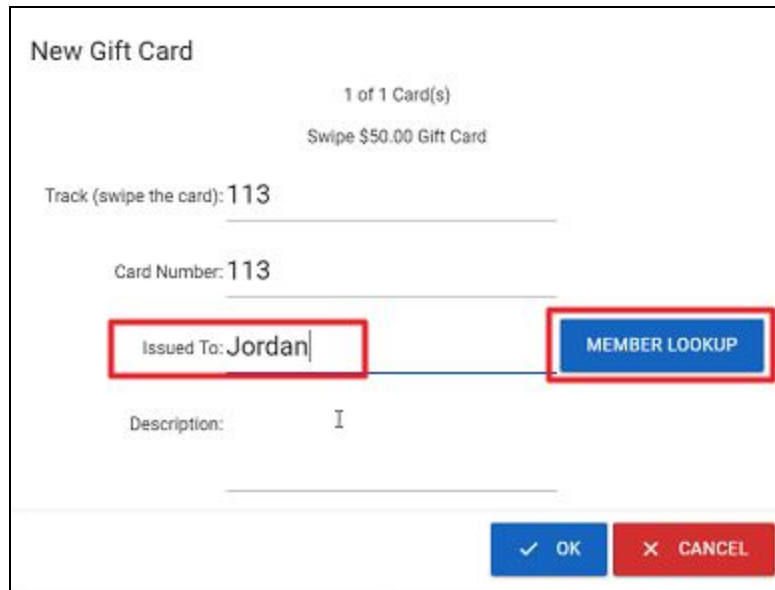- **Inventoried items sold from Mobile POS now update CMA to properly reflect reduction in Inventory Quantities.**

Gift Card Support

- **Enhanced User experience by allowing the use, sale, and balance checks/details of Gift Cards.**

  Use Case: Previously, Moblie POS did not support gift card usage. Users can now sell Gift Cards to Members and Guests, allow for automatic numbering of Gift Cards (which syncs with CMA/Classic POS), complete a sale with Gift Card as payment, and check the remaining balance or issuance details of a Gift Card on Mobile POS, as seen below.

  Sales of gift cards can be issued to **Guests** or **Members**. Once gift card item has been chosen, and issuance amount has been entered, gift card specifics may be populated. If auto increment has been turned on in Classic, gift card number (113 below) will auto-populate.

  Users can also now use an issued Gift Card as the method of Payment in Mobile POS by selecting Gift Certificate as the Payment Method, then searching for the Gift Card, selecting the corresponding Gift Card, and selecting **OK**. Gift Card will then show on the Ticket.

ADD A PAYMENT

MbrChr 2nd	>
Member Charge	>
BV Cash	>
Credit Book ($0.00)	>
Gift Certificate	**>**

ADJUSTMENTS

Tax Exempt

SC Exempt

Add Gratuity

Ticket #: 54

[NP30004] Anderson, John

1 Callaway B.Bertha Alpha 815 DD
— 08

Sub Total: $29.00
Tax: $2.03

Total: $31.03

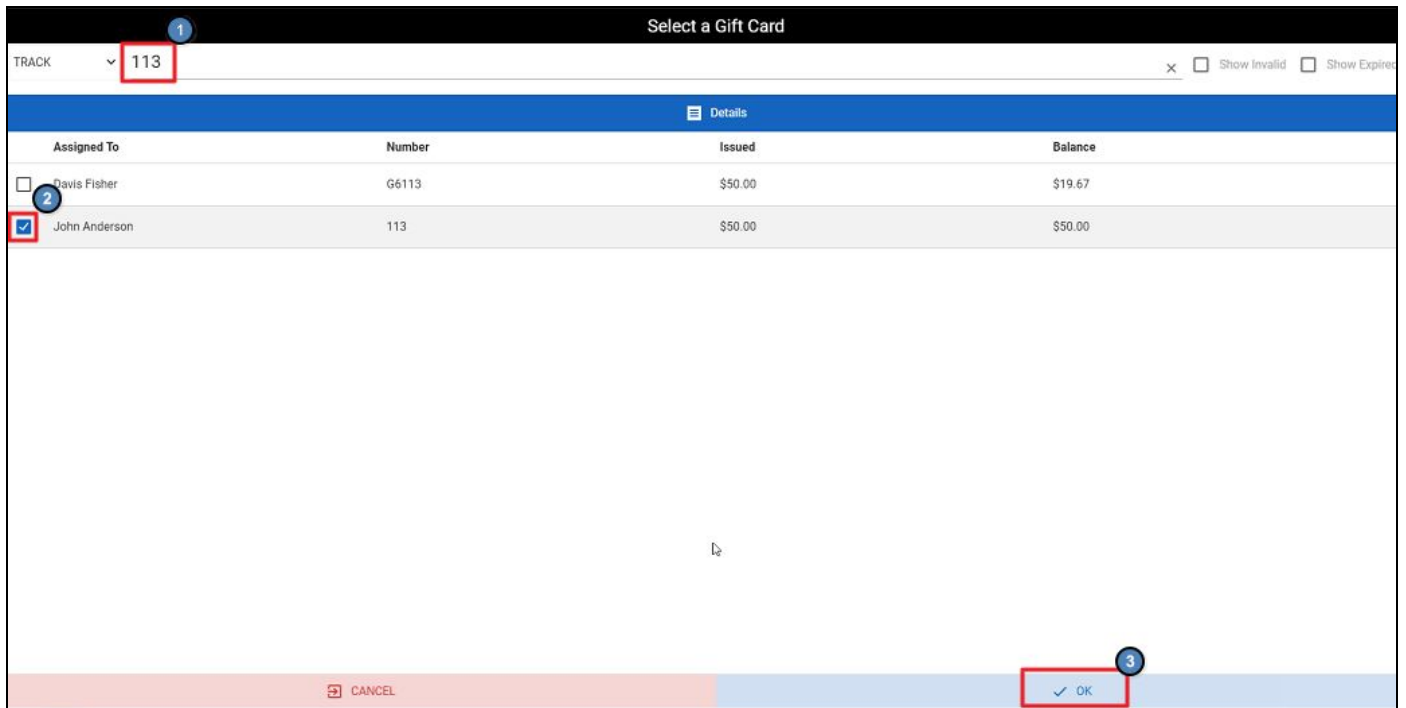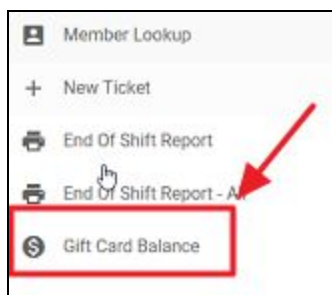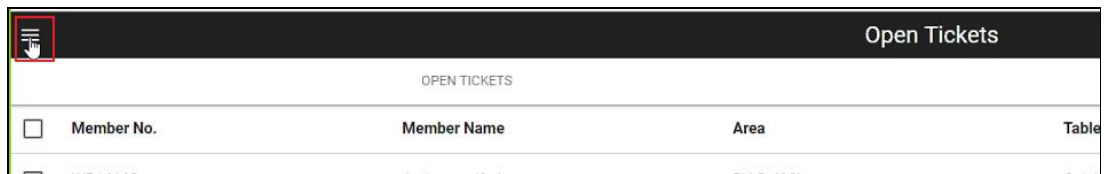Due: $31.03

🖶 PRINT   🖶 PRINT AND DONE   ⮕ CANCEL

Users can check the balance and details of a Gift Card from the main menu by selecting **Gift Card Balance** and then entering the Gift Card Number, as shown below.

Security

- **Added employee security role support for Tax Exempt/Service Charge Exempt in Mobile POS.**

  Use Case: To make a POS ticket Tax or Service charge exempt, the Employee security in the POS Terminal Category must be checked for **Service Charge Exempt** and **Tax Exempt**. Now Mobile POS respects this rule set from CMA to either allow or disallow employee from making ticket tax or service charge exempt.
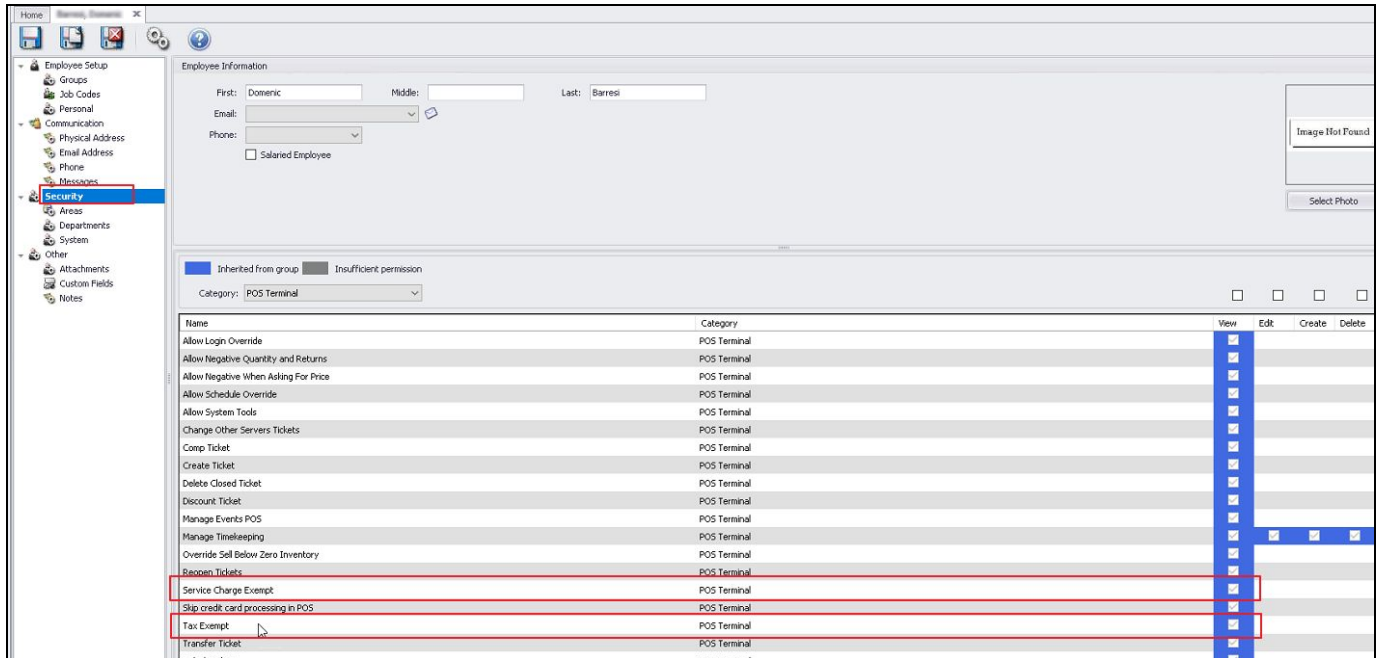
Bug Fixes

- Fixed an issue with the CE Payments Settlements report including settlements that occurred outside of the Start/End Date of the report.

- Fixed an issue when viewing the Settle Chit for a Mobile POS ticket in CMA and the chit did not display properly.

- Fixed an issue when using Deferred billing schedules with combo billing and the journal batch not breaking out the settlement amounts by the billing frequency.

- Fixed an issue with the General Ledger Dashboard's Consolidated Rolling Net Profit/Loss displaying incorrectly.

- Fixed an issue with the Hour of Day field in the Golf Play view of the Data Genie not displaying properly/always displaying a 0.

- Fixed an issue when setting up a club for Mobile POS and Mobile Ordering and Area data not syncing properly.