

09.26.16 Releases

User Guide - Table of Contents

[Enhancements](#)

[Accounts Payable](#)

[Manage Purchase Orders - Entry Form](#)

[Manage Item Receipts - Entry Form](#)

[Manage Vendor Invoices - Entry Form](#)

[Interactive Reports](#)

[Membership - Gift Card Transaction Report](#)

[Point of Sale - Monthly Sales Summary](#)

[Membership](#)

[Member Payments - Cash Receipt Wizard](#)

[Manage Members - Grid](#)

[Print Member Statements - Flat Address](#)

[Items: Manage Items](#)

[Point of Sale \(POS\): System Tools/Reports Menu](#)

[System, System Settings: Website - Clubessential - Sync](#)

[Bug Fixes](#)

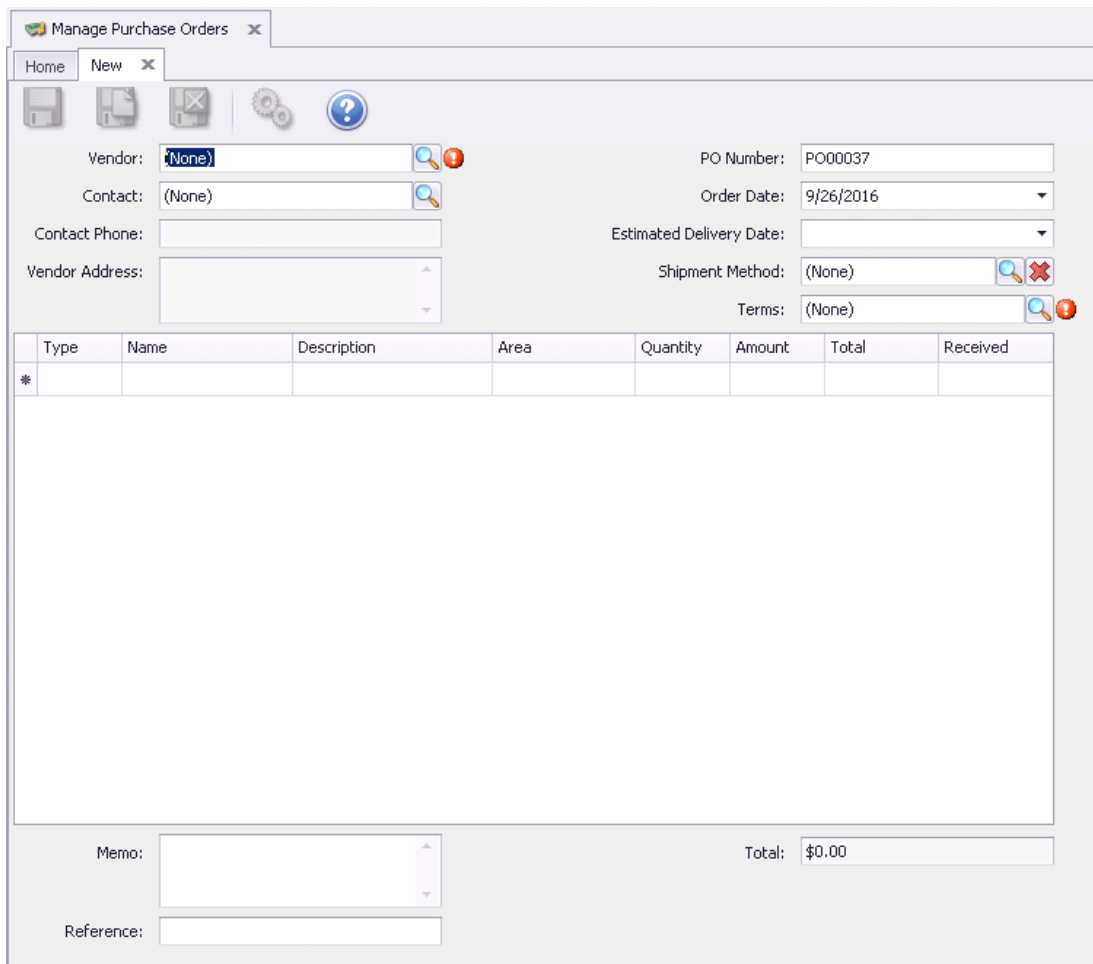
Enhancements

Accounts Payable

Manage Purchase Orders - Entry Form

- **UX Improvements (Same screen layout, improved user experience)**

Use Case: Entering data is now easier with this upgraded technology. Quickly tab to move from field-to-field and enjoy this upgraded responsive form.



The screenshot shows a web-based form titled "Manage Purchase Orders". The form is organized into several sections:

- Navigation:** "Home" and "New" tabs are visible at the top left.
- Vendor Information:** Fields for "Vendor" (set to "None"), "Contact" (set to "(None)"), "Contact Phone", and "Vendor Address".
- Order Details:** Fields for "PO Number" (PO00037), "Order Date" (9/26/2016), "Estimated Delivery Date", "Shipment Method" (set to "(None)"), and "Terms" (set to "(None)").
- Table:** A table with columns: Type, Name, Description, Area, Quantity, Amount, Total, and Received. The first row contains an asterisk (*).
- Summary:** A "Memo" field, a "Reference" field, and a "Total" field showing "\$0.00".

Manage Item Receipts - Entry Form

- **Same enhancements noted above.**

Manage Vendor Invoices - Entry Form

- **Same enhancements noted above.**

Interactive Reports

Membership - Gift Card Transaction Report

- Updated to include a Gift Card Number search parameter.

Use Case: Researching a specific gift card history for a Member is now easy to do with the Gift Card Number search parameter added to the report.

Report Settings: (Default) Save Current Settings Delete Selected Setting Make Public Setup Email Delivery

Start Date: 9/19/2016 End Date: 9/26/2016 Member: (None)

Detail Level: Gift Card Type Gift Card Type: (All) Gift Card Number: 734

Include Expired

Clubsoft Acceptance Server

Gift Card Transactions Report

From 9/19/2016 To 9/26/2016

Member: <All>

Gift Card Number: 734

Gift Card	Description	Expire Date	POS Ticket #	Trans. Date	Trans. Amount	Balance
Default Gift Card Type					\$50.00	\$50.00
734					\$50.00	\$50.00
Totals:					\$50.00	\$50.00

9/26/2016 8:52 AM Page 1/1

Point of Sale - Monthly Sales Summary

- Updated to include Grand Totals.

Use Case: Previously, this report contained columnar totals, but did not have the Grand Total summary for the report. Now, it is possible to view the total of all activity in this report.

Report Settings: (Default) Save Current Settings Delete Selected Setting Make Public Setup Email Delivery

Start Date: 9/ 1/2016 End Date: 9/26/2016

Area Categories: (All) Item Groups: (All)

Type: (All) Include: (All)

9/4/2016	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
9/5/2016	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
9/6/2016	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
9/7/2016	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
9/8/2016	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
9/9/2016	0	0	0	8	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
9/10/2016	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
9/11/2016	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
9/12/2016	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
9/13/2016	0	0	0	39	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
9/14/2016	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
9/15/2016	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
9/16/2016	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
9/17/2016	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
9/18/2016	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
9/19/2016	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
9/20/2016	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
9/21/2016	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
9/22/2016	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
9/23/2016	0	75	0	13	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
9/24/2016	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
9/25/2016	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
9/26/2016	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Totals	0	75	0	174	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Grand Total:		2,042																	

9/26/2016 8:56 AM Page 1/1

Membership

Member Payments - Cash Receipt Wizard

- Updated the Cash Receipt Wizard to group line items for the same member and bank account/credit card so members only see one transaction even if the transaction has been split across multiple AR accounts.

Use Case: Previously, Clubs having multiple A/R Accounts (Dues A/R, House A/R, etc), generated multiple deposit records on the Club side, and multiple lines hitting the Member's bank/credit card activity. Now, if one Member payment of \$600, is applied to (3) different A/R accounts, Member will see one charge on their Bank/Credit Card activity, and Club will see one deposit amount on the Club side. This behind the scenes functionality requires no change on the User side.

Cash Receipt Wizard					
Enter Cash Receipts					
Member	Check Dat	Check No.	Amount	Ledger	
[10254] Maier, Rachelle	09/23/2016	123	\$300.00	Accounts Receivable - Due	
[10254] Maier, Rachelle	09/23/2016	123	\$100.00	Accounts Receivable - Hou	
[10254] Maier, Rachelle	09/23/2016	123	\$200.00	Accounts Receivable - Oth	
			\$600.00		

Manage Members - Grid

- Updated the "Years Of Membership" column on member grid to always use the Billing Member's Join Date when displaying Dependent Member records.

Use Case: Previously blank, this field is now populated based on Billing Member's Join Date to increase consistency of data.

Member Number	Last Name	First Name	Member Type	Auto Payment	Join Date	Years Of Membership	Billir
230	Bourne	Al	Corporate Golf Junior	<input type="checkbox"/>	06/15/1996	20	
230A	Bourne	Emilee	Sp-Corporate Golf	<input type="checkbox"/>	06/15/1996	20	

Print Member Statements - Flat Address

- Updated the Member Statement Flat Address field to include Street3 and Street4 if populated.

Use Case: Previously, Street3 and Street4 were excluded from the Flat Address (used in Statement Printing). If these fields were necessary, Support had to handle on a case-by-case basis. Now, if populated in Member Profile,

The screenshot shows the 'Edit Address' window with the following fields:

- Category: Business
- Street 1: State Farm Insurance
- Street 2: 4124 Quebec Avenue North
- Street 3: Building A
- Street 4: Suite 102
- City: New Hope
- State: WA
- Zip Code: 55427
- Province:
- Country:
- Note:
- Share:

Below the fields is a 'Notifications' table:

Selected	Name	Start Date	End Date	Repeat Annually
<input checked="" type="checkbox"/>	Statement			<input type="checkbox"/>
<input type="checkbox"/>	Social			<input type="checkbox"/>

Street 3 and Street 4 will automatically be included in the Flat Address of Statement Generation.

The screenshot shows the 'Member Statement Wizard' window with the following sections:

- Filter Settings:** Member Group: (All), Print Order: Member ID
- Select Members...** (button)
- Selected Members:**

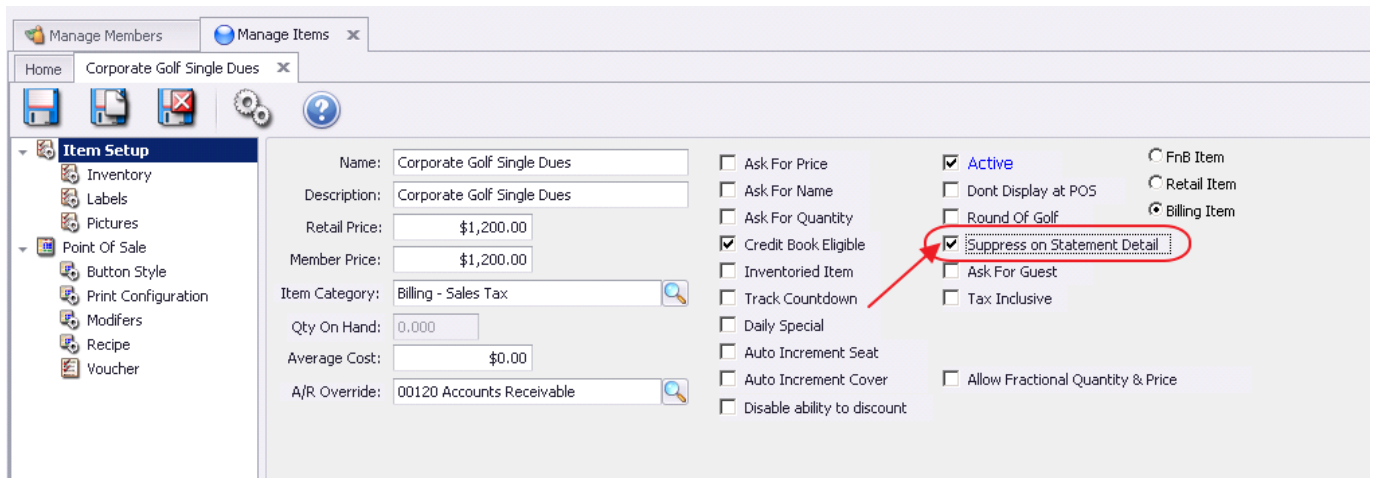
ID	Name	Address	
24	Dillon, Shad		<input checked="" type="checkbox"/>
801	Clancy, Duane		<input checked="" type="checkbox"/>

Items: Manage Items

- Updated the POS Item editor to show "Suppress on Statement Detail" option. This allows a user to hide billing-only tickets from statement detail.

Use Case: When generating statement details, this new option allows Billing Items (such as Dues, etc), to be suppressed from printing detailed receipts with the statement.

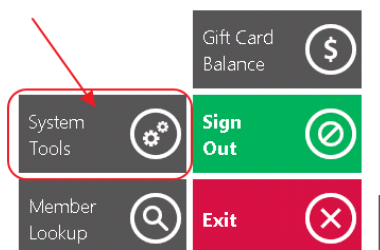
Printing a detailed receipt for billing related items (such as Dues), was not a value-added step, and therefore, this change was implemented.

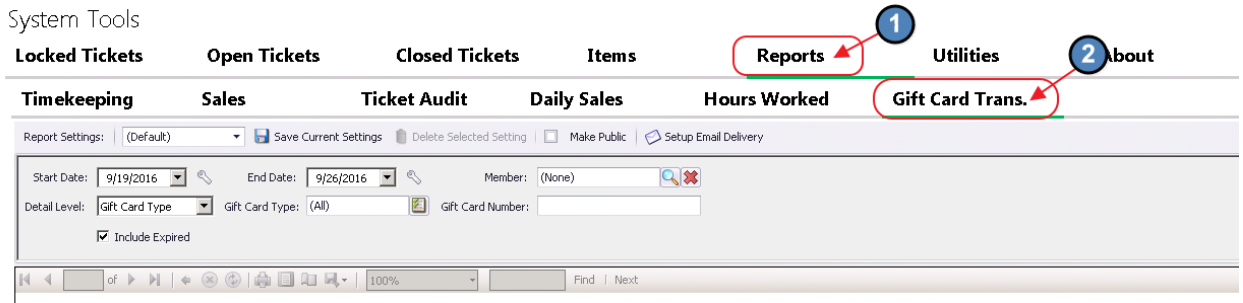


Point of Sale (POS): System Tools/Reports Menu

- Updated POS to allow the Gift Card Transactions report to be run in System Tools / Reports menu.

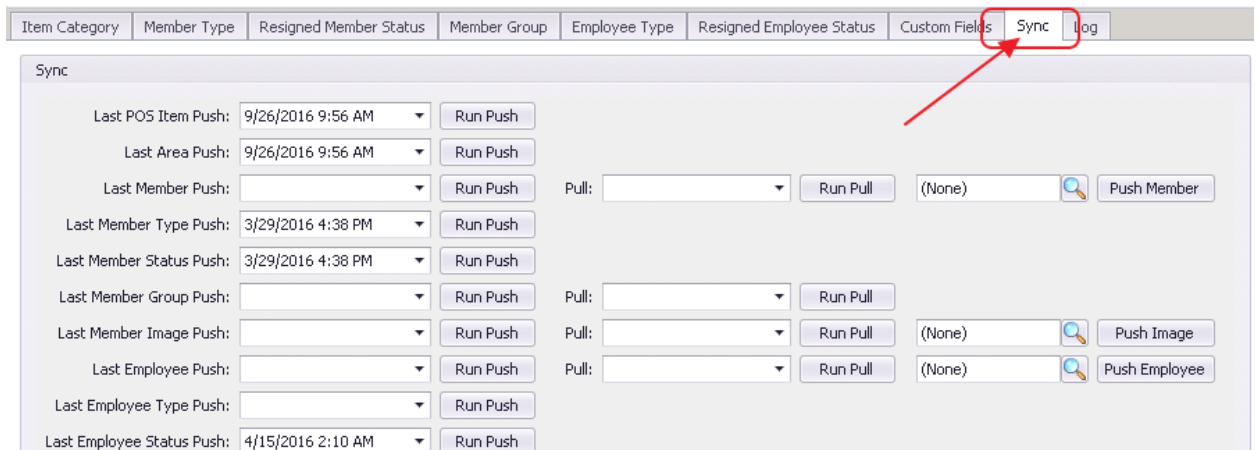
Use Case: Previously, if a Member had a question about their Gift Card usage, etc, the Club would have to log in to the back Office (CMA) to view the Gift Card Transactions report. With this enhancement, the Club can provide Member with expedited service by accessing the report directly through the POS.





System, System Settings: Website - Clubessential - Sync

- Updated to always push the Billing Member's Join Date for dependent records.**
Use Case: Previously blank, this field is now populated during the sync based on Billing Member's Join Date to increase consistency of data. This behind the scenes functionality requires no change on the User side.



Bug Fixes

- Fixed an issue with pulling tee times from MembersFirst when provided invalid data.
- Fixed an issue with the Global Transaction Search taking a very long time or crashing when searching large databases.