Office - 11.19.18 Release

User Guide - Table of Contents

Enhancements

Membership

Member Grid

- **Enhanced functionality has been added to the Manage Members grid.**

  Use Case: Previously, Aging Balances would not always update automatically. Now, a Refresh Aging button has been added to the Manage Members Grid for Users to refresh all Member Aging Balances showing on the grid.

Interactive Reporting

Data Genie

- **Sync to Reporting Database - Data Genie views**

  Use Case: Previously, Clubs set up with a Reporting database would see all Data Genie views available even if they did not pertain to their particular business needs. Now, enhanced functionality within Data Genie Settings menu allows Users to choose which Data Genie View will sync to their reporting database.
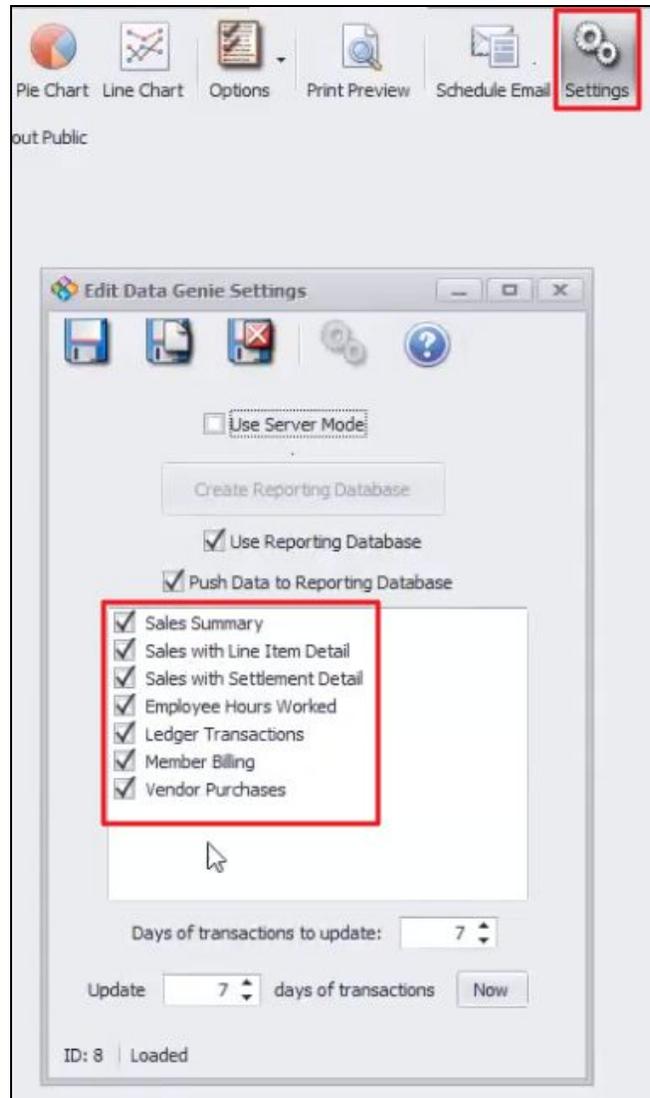
Financial Report Writer

- **Enabled Financial Report Writer functionality for Clubs with Multiple Databases.**

  Use Case: For Clubs with Multiple Databases, Financial Report Writer can now be used in the master database for creation and viewing of Financial Reports that aggregates the data from individual databases. Clubessential can assist with setup of this feature for Clubs with Multiple Databases.
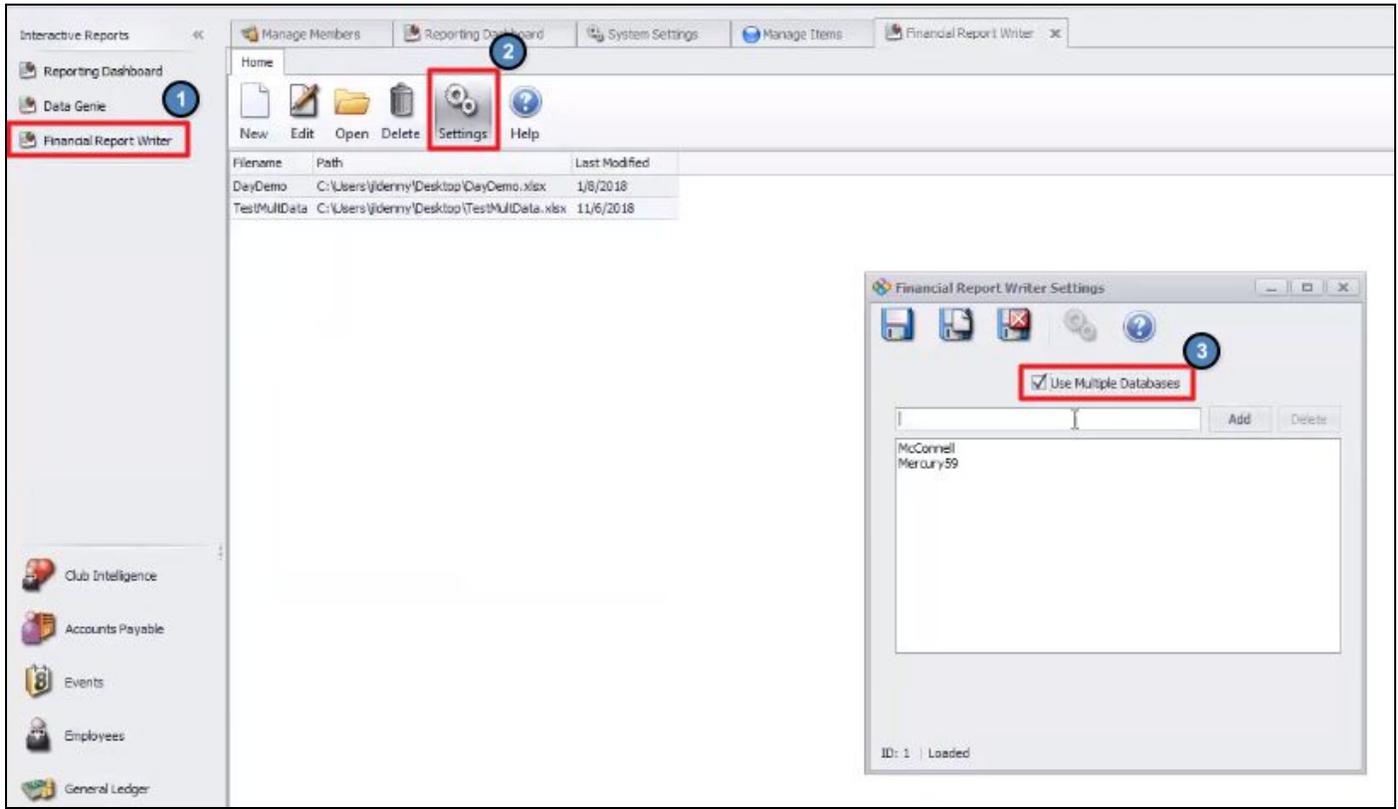
Member Voucher Transactions Report

- **Redesigned filters and added option to show only Vouchers redeemed in the designated time frame.**

  Use Case: Previously, the voucher report allowed for display of Vouchers sold, or Vouchers sold or redeemed, but not just redeemed. This change will allow detailed tie out of vouchers redeemed in a given period.
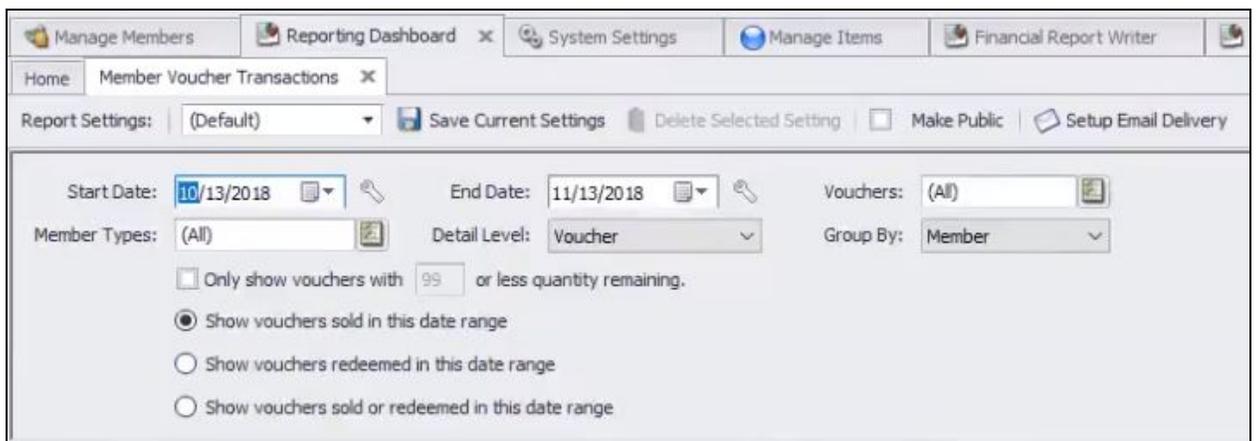
PayCloud Users

- **Enhanced User experience by adding the option to turn On/Off the AR Aging section of the Statement Push from Office to PayCloud.**

  Use Case**:** Users can now choose whether or not they would like to include AR Aging Balances on their Statement Push. Checkbox for this setting is located in the Endpoint Settings, as seen below.

  Please Note: When this setting is not checked, Members will only see their Current Balance on their Statement; not including their Aged Balance.

Mobile POS (Pilot Clubs Only)

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

Countdown Support

- **Enhanced User experience by showing Countdown values for any item marked as a Countdown in CMA.**

Use Case: Previously, Mobile POS did show Countdown values for items marked as a Countdown in CMA. Now, Mobile POS updates items marked as Countdown in CMA. Also, the Countdown Quantity immediately synchronizes with all platforms (CMA, Mobile POS, Classic POS), as seen below.

Mobile POS:
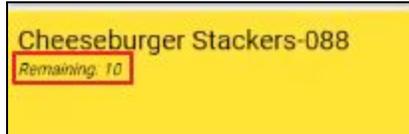

CMA:
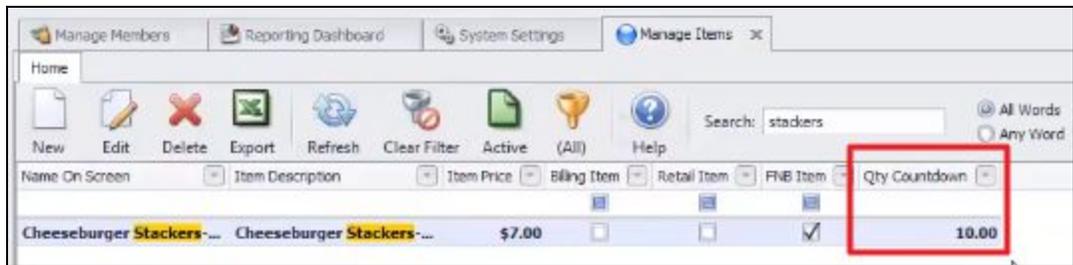
End of Shift Report

● **Enhanced End of Shift Reporting**

Use Case: Previously, Mobile POS End of shift reporting was limited. Now, Employees can print End of Shift reports to a particular printer for a certain date range. Admin Users can now print enhanced End of Shift reports for a certain Area, Area Group, Area Category, Device, or Device Category.

Employee Access:
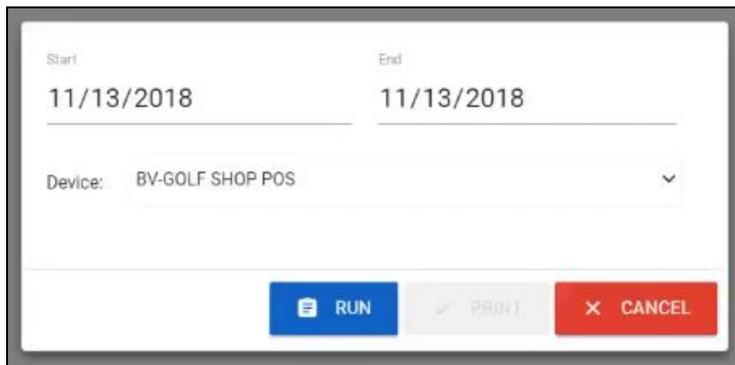
Admin User:
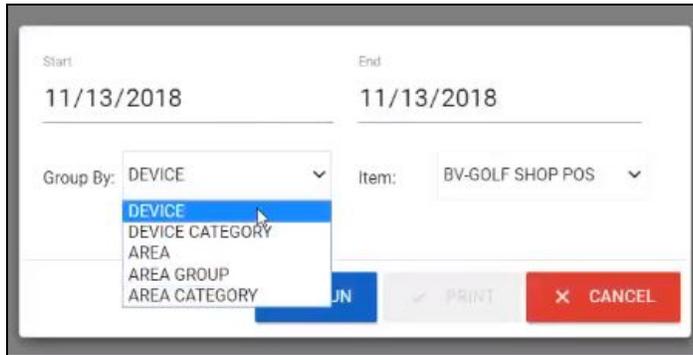
Item Lookup Support

- **Enhanced User experience by adding Item Lookup functionality**

  Use Case: Previously, Item Lookup functionality was not included in Mobile POS. Now, Users can easily look at all Items via the Item Lookup menu, just as in Classic POS, and it will reflect all current items with filtering options for showing all or showing only Countdown Items.

Item Countdown Quantities can also be edited from Mobile POS now as well.
Once these quantities are updates, they will again reflect across all systems.

Firing Support

- **Added functionality for Mobile POS when configuring items or item categories with Courses in CMA.**

    Use Case: Previously, Mobile POS did not support coursing when firing Items. Now, added functionality allows for Users to fire Items by course on the Order Entry Screen.

    Once an Order is entered, Users can change the Course for each item in the menu below.

Once fired, the whole ticket will print to the kitchen, labeling the courses. The User will see the courses fired in red, and can then fire next courses as needed. The following courses will print a ticket to the kitchen indicating the current course.

Email Receipt Support

- **Increased User functionality when Settling a Ticket in Mobile POS to allow the option to email a copy of the receipt to the Member.**

  Use Case: Previously, Mobile POS did not support email receipt functionality. Added support now allows Users to select an option to send an email copy of the receipt to the Member.
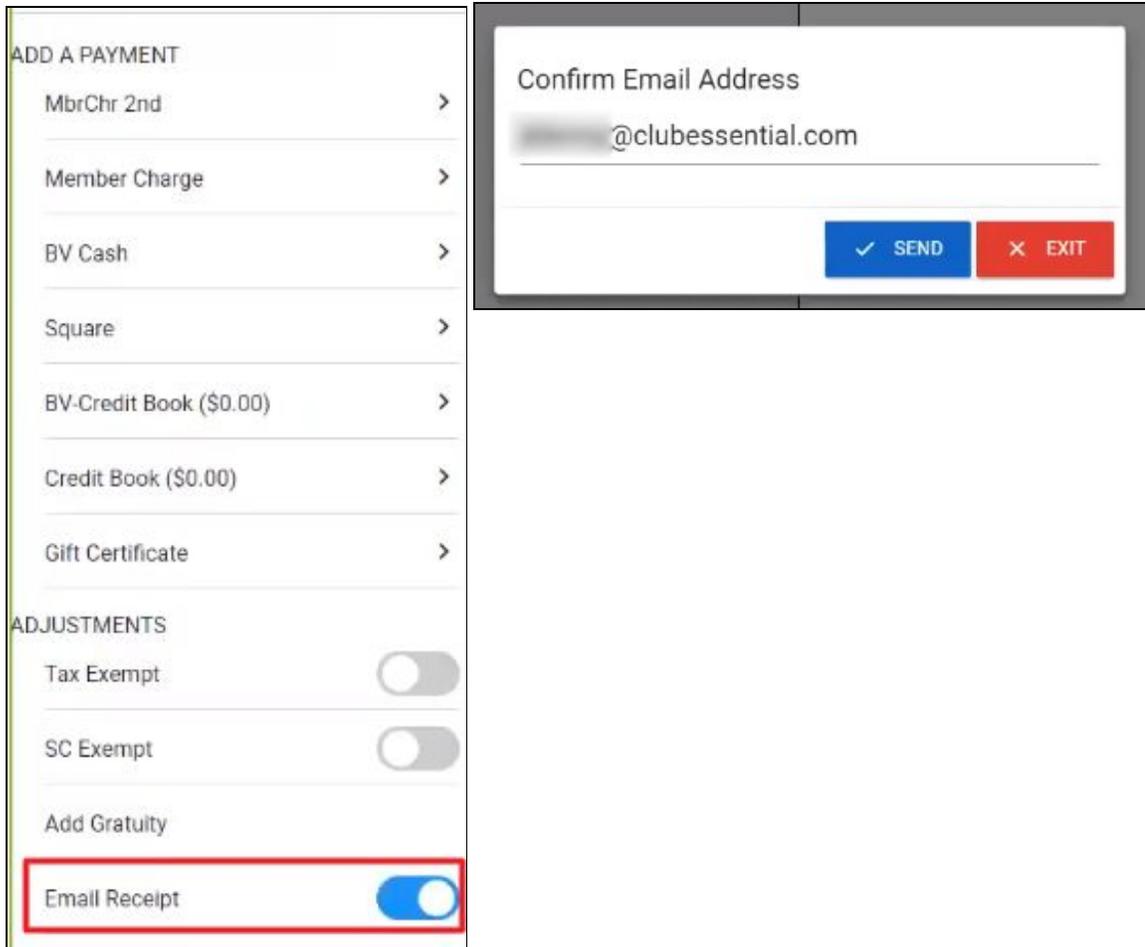
Tee Sheet Integration

- **Added new functionality by including integration for Tee Times to Mobile POS from the Website Tee Times tool.**

  Please Note: This feature only affects those Clients piloting the Mobile POS Program who **also** have the Clubessential Tee Times tool.

Use Case: Previously, Mobile POS did not integrate with Website Tee Times. Now, with added functionality, Mobile POS can support Mobile Tee Times by allowing Users to view, Check-In, and Settle Tee Times bookings via the new Tee Times tab on Mobile POS shown here.
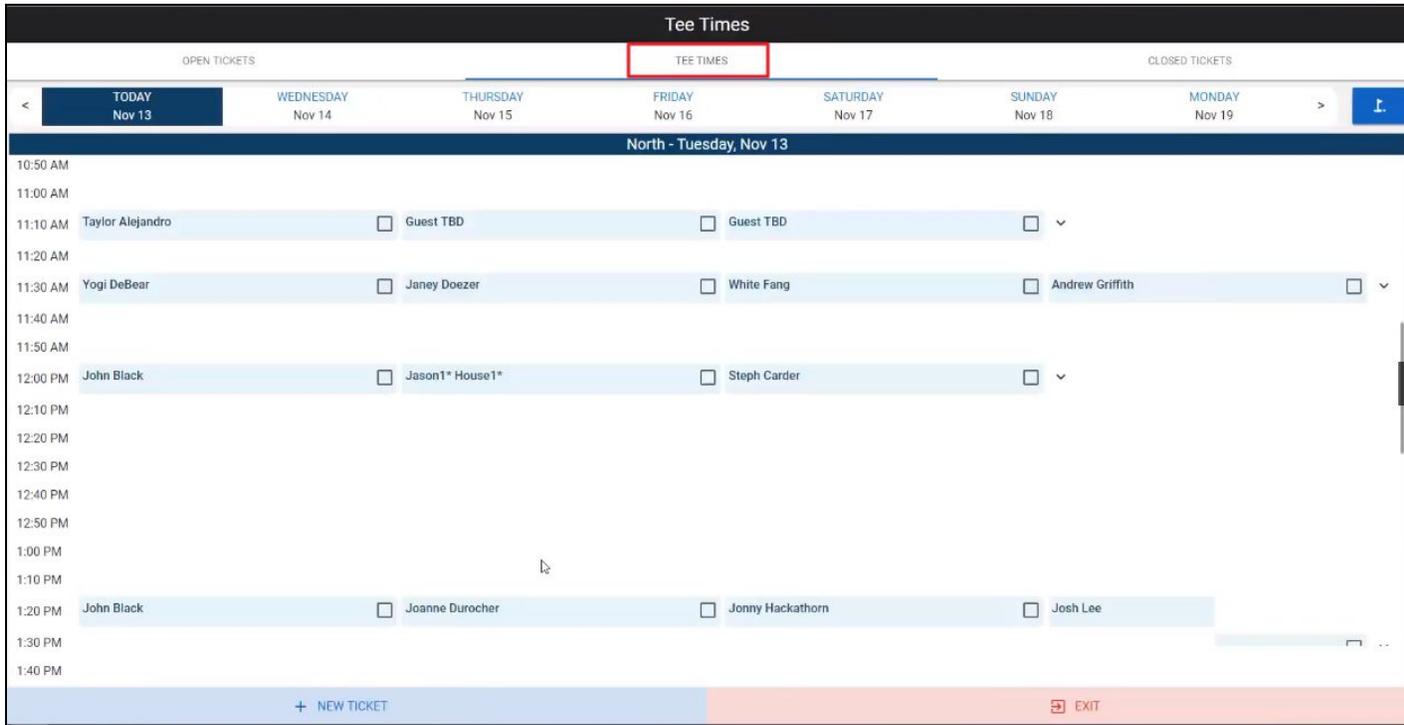
Within the Tee Times tab, Users can select and expand a Tee Time, show Member name, round, and any fees associated with the booking. Once selected, Users can Create a Ticket or Member Charge to Settle.
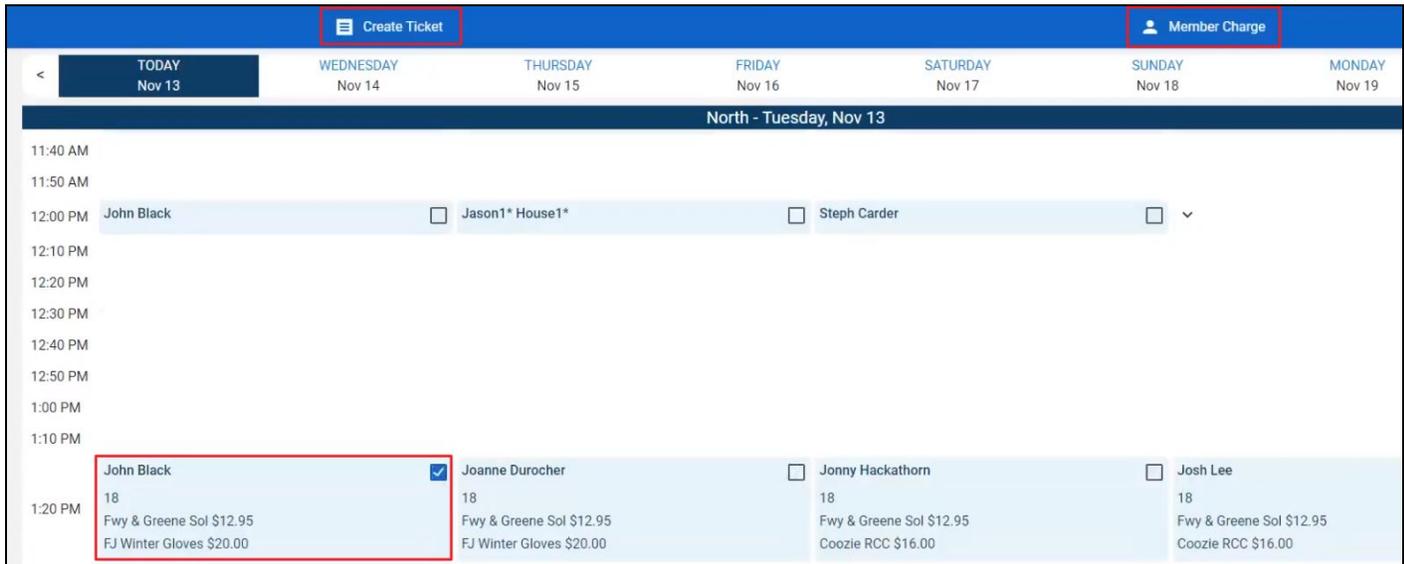
Bug Fixes

- Fixed an issue where Item Modifiers were not printing on settle tickets in retail areas in Classic POS.

- Fixed an issue with ETS when closing a ticket to Tab in Classic POS and the ticket staying in a Pre-Approved state.

- Fixed an issue when saving a report layout and it overwriting the next run date.

- Fixed an issue where a reversal of a CE Payment was also reversing the fees.

- Fixed an issue in Mobile POS where credit book was not applying to gratuity when settling a ticket.

- Fixed an issue with print configurations not working properly in Mobile POS when the area they were created for was not configured properly.

- Fixed inconsistencies when attempting to view System Tools in Classic POS.

- Fixed an issue when attempting to view a saved report layout when an employee's employee groups have changed.

- Fixed an issue where changes to a screen group in CMA were not syncing to Mobile POS.

- Fixed an issue when setting up a File Export in CMA and not being able to export to hard drives with certain letters.