



# Office - 8.19.19 Release

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# Enhancements

## CE Payments

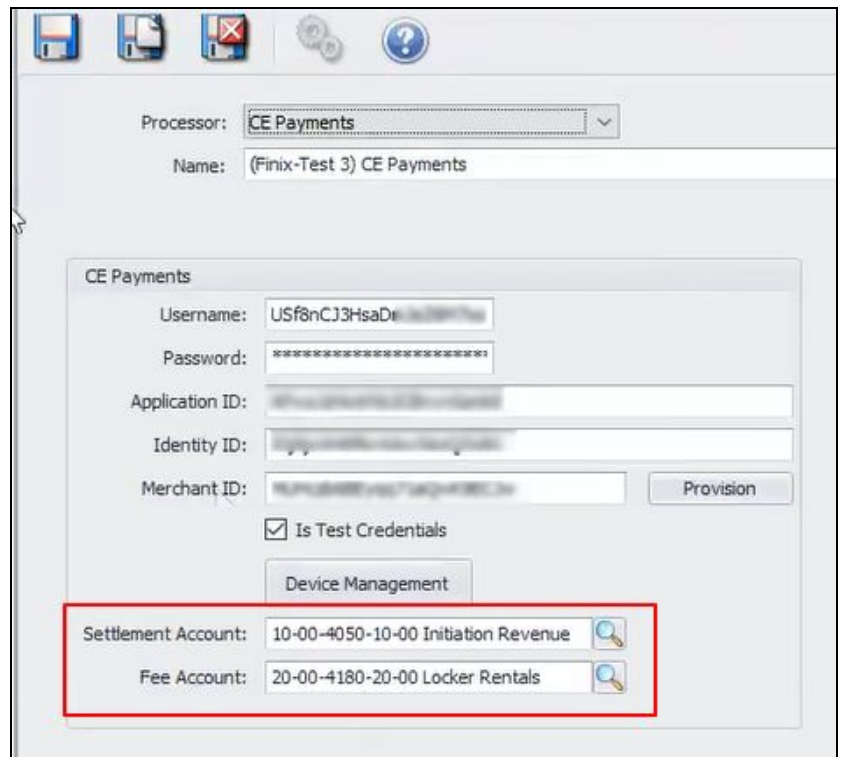
### Settlement/Fee Accounts

- Updated the CE Payments card-present integration to support multiple Settlement/Fee Accounts at the token level.

Use Case: When a Club has multiple Settlement/Fee Accounts, previously Clubs using CE Payments card-present integration would only have one settlement/fee account system-wide. Now, Users can specify accounts at the Token level instead of system-wide.

**For example,** A Club may have a Golf Pro that runs the Golf Shop and takes on the revenue, and then the Club handles the Dining Room revenue; both using CE Payments. Previously, all funds from both the Golf Shop and Dining Room would have flowed through one Settlement/Fee account. Now, multiple tokens/accounts can be defined for both the Golf Shop and Dining Room; effectively separating the two streams of revenue.

This new feature can be accessed in CMA under **Merchant Processing Tokens**, then selecting specific Token to edit, shown here.

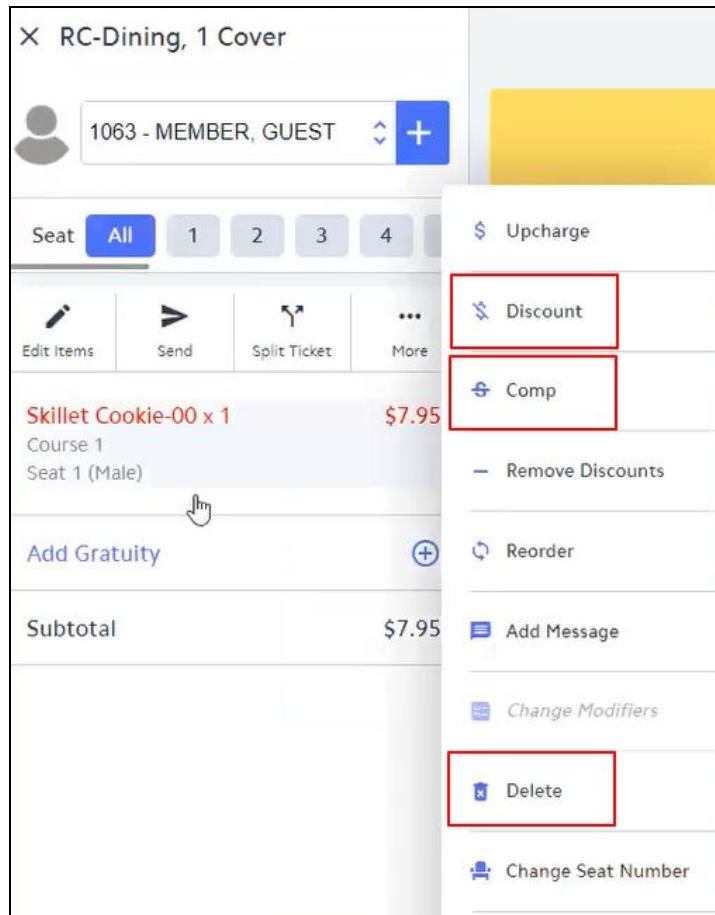


# Mobile POS

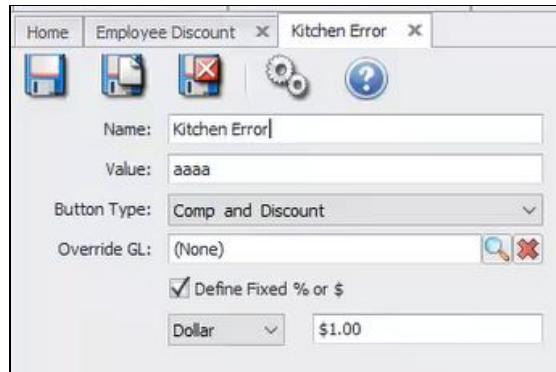
## Reason Codes

- **Mobile POS now supports Reason Codes.**

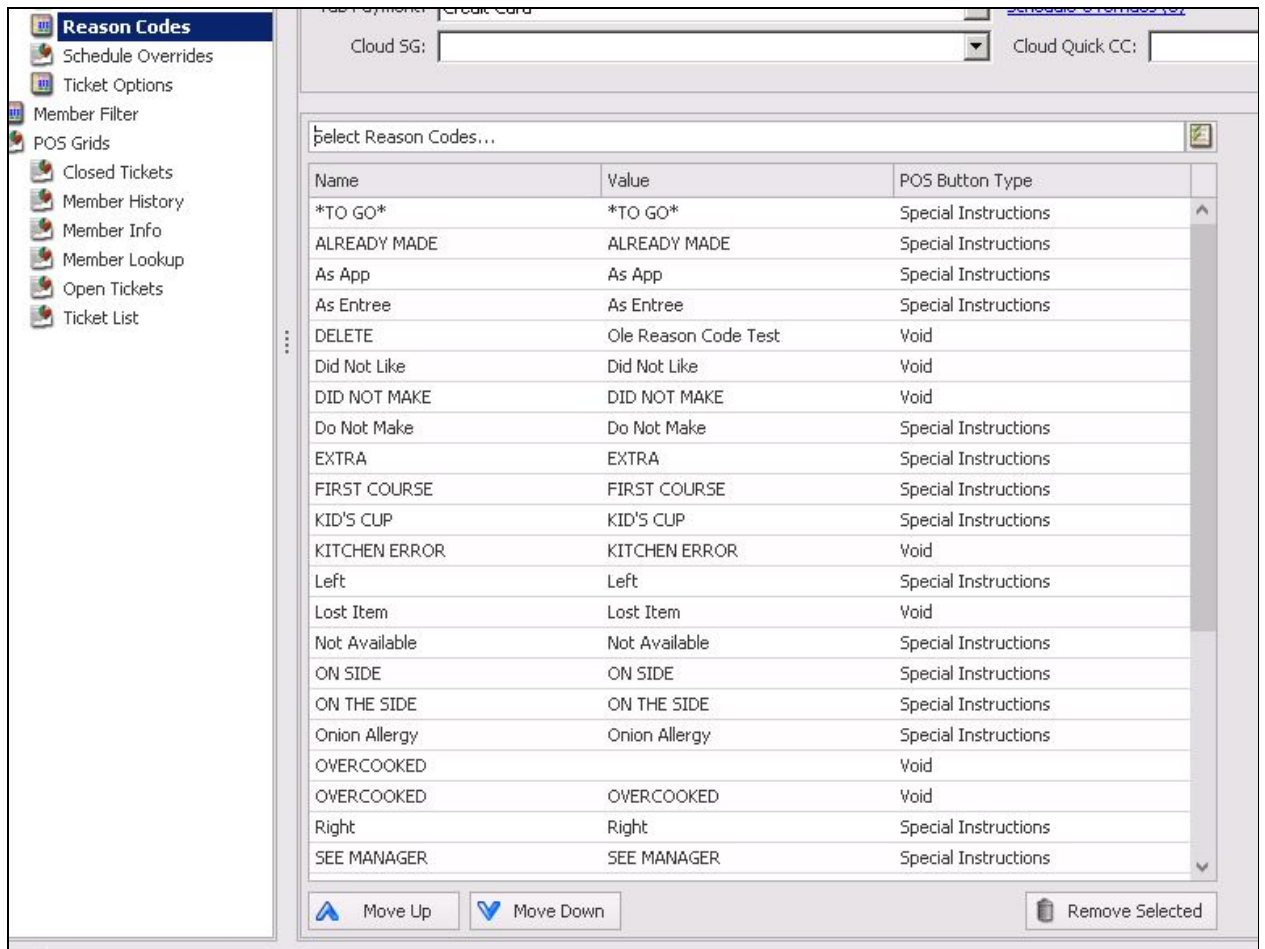
Use Case: Mobile POS now supports reason codes added by Area in CMA. Now, Users can set reason codes for each Area and they will populate in Mobile POS when Users Discount, Void, or Comp an Item, example shown below.



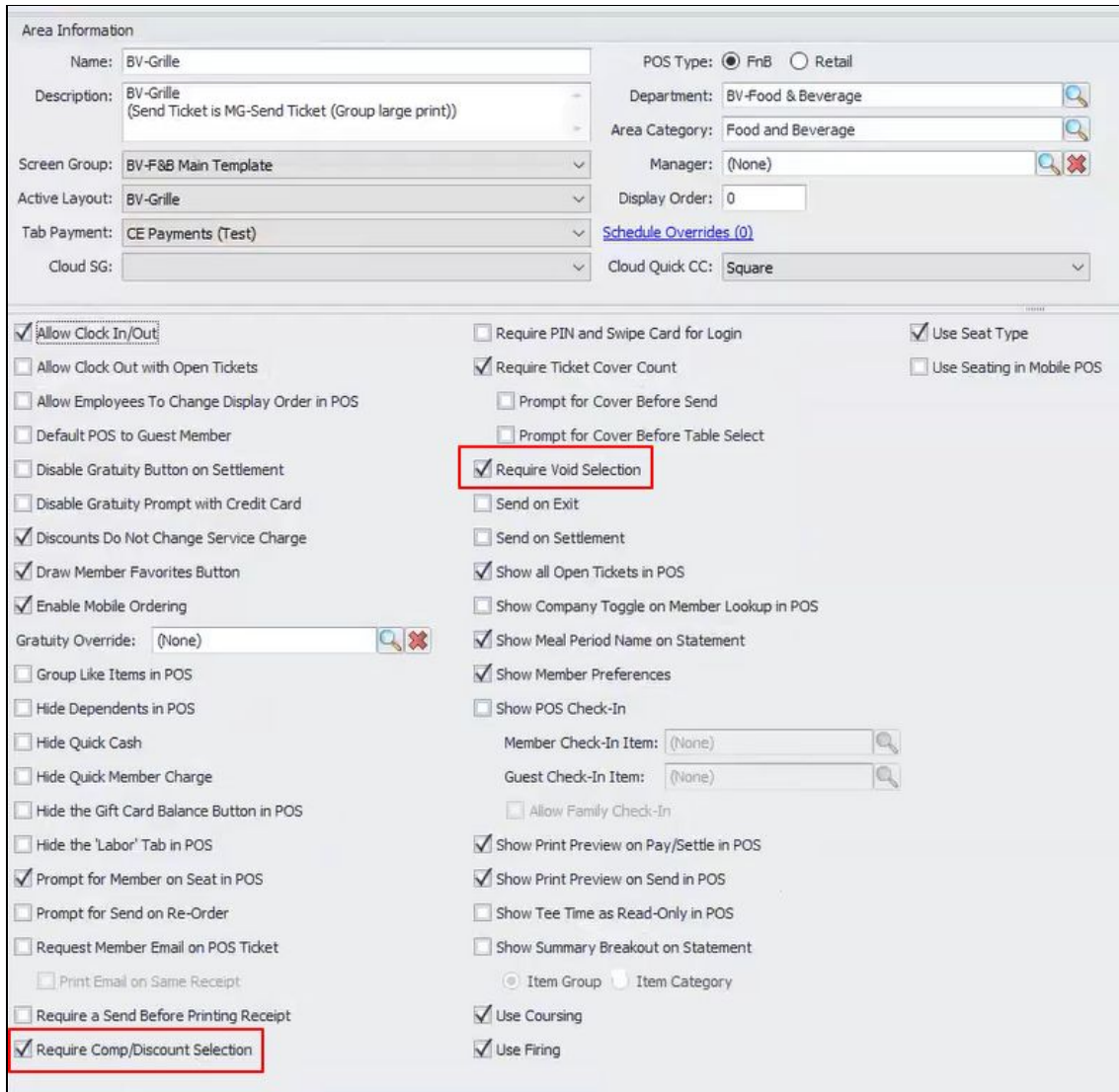
When setting up Reason Codes in CMA, users can select the type of discount, description, and fixed amount or percentage.



**Please Note:** Applicable reason codes will need to be added to their respective areas within CMA Area settings → Reason Codes in order for the reason codes to show.



**Please Note:** If Require Void Selection and Require Comp/Discount Selection settings are checked in CMA Area settings, the user will be forced to select one of the populated reasons, and unable to enter free form text.



**Area Information**

Name: BV-Grille  
 Description: BV-Grille (Send Ticket is MG-Send Ticket (Group large print))  
 Screen Group: BV-F&B Main Template  
 Active Layout: BV-Grille  
 Tab Payment: CE Payments (Test)  
 Cloud SG: [Dropdown]

POS Type:  FnB  Retail  
 Department: BV-Food & Beverage  
 Area Category: Food and Beverage  
 Manager: (None)  
 Display Order: 0  
[Schedule Overrides \(0\)](#)  
 Cloud Quick CC: Square

**Settings**

- Allow Clock In/Out
- Allow Clock Out with Open Tickets
- Allow Employees To Change Display Order in POS
- Default POS to Guest Member
- Disable Gratuity Button on Settlement
- Disable Gratuity Prompt with Credit Card
- Discounts Do Not Change Service Charge
- Draw Member Favorites Button
- Enable Mobile Ordering
- Gratuity Override: (None)
- Group Like Items in POS
- Hide Dependents in POS
- Hide Quick Cash
- Hide Quick Member Charge
- Hide the Gift Card Balance Button in POS
- Hide the 'Labor' Tab in POS
- Prompt for Member on Seat in POS
- Prompt for Send on Re-Order
- Request Member Email on POS Ticket
- Print Email on Same Receipt
- Require a Send Before Printing Receipt
- Require Comp/Discount Selection**
- Require PIN and Swipe Card for Login
- Require Ticket Cover Count
- Prompt for Cover Before Send
- Prompt for Cover Before Table Select
- Require Void Selection**
- Send on Exit
- Send on Settlement
- Show all Open Tickets in POS
- Show Company Toggle on Member Lookup in POS
- Show Meal Period Name on Statement
- Show Member Preferences
- Show POS Check-In
- Member Check-In Item: (None)
- Guest Check-In Item: (None)
- Allow Family Check-In
- Show Print Preview on Pay/Settle in POS
- Show Print Preview on Send in POS
- Show Tee Time as Read-Only in POS
- Show Summary Breakout on Statement
- Item Group  Item Category
- Use Coursing
- Use Firing
- Use Seat Type
- Use Seating in Mobile POS

Additionally, the **Deletes/Voids/Discounts/Comps report** can be filtered by Reason Code, and Mobile POS tickets with Reason Codes will show categorized by the type of adjustment. Seen below.

The screenshot shows the ClubSoft software interface for a report titled "Deletes/Voids/Discounts/Comps". The report settings are configured for the date 8/13/2019, with "Reason Codes" set to "(All)". The interface displays two tables: "Deleted Tickets" and "Discounted Tickets".

**Deleted Tickets Table:**

Ticket	Area	Created By	Deleted By	Member	Time Deleted	Amt
1066	BV-Grille	User, ClubSoft		[SC3275] Anderson, Tom	8/13/2019 12:56:24 PM	\$0.00
						\$0.00

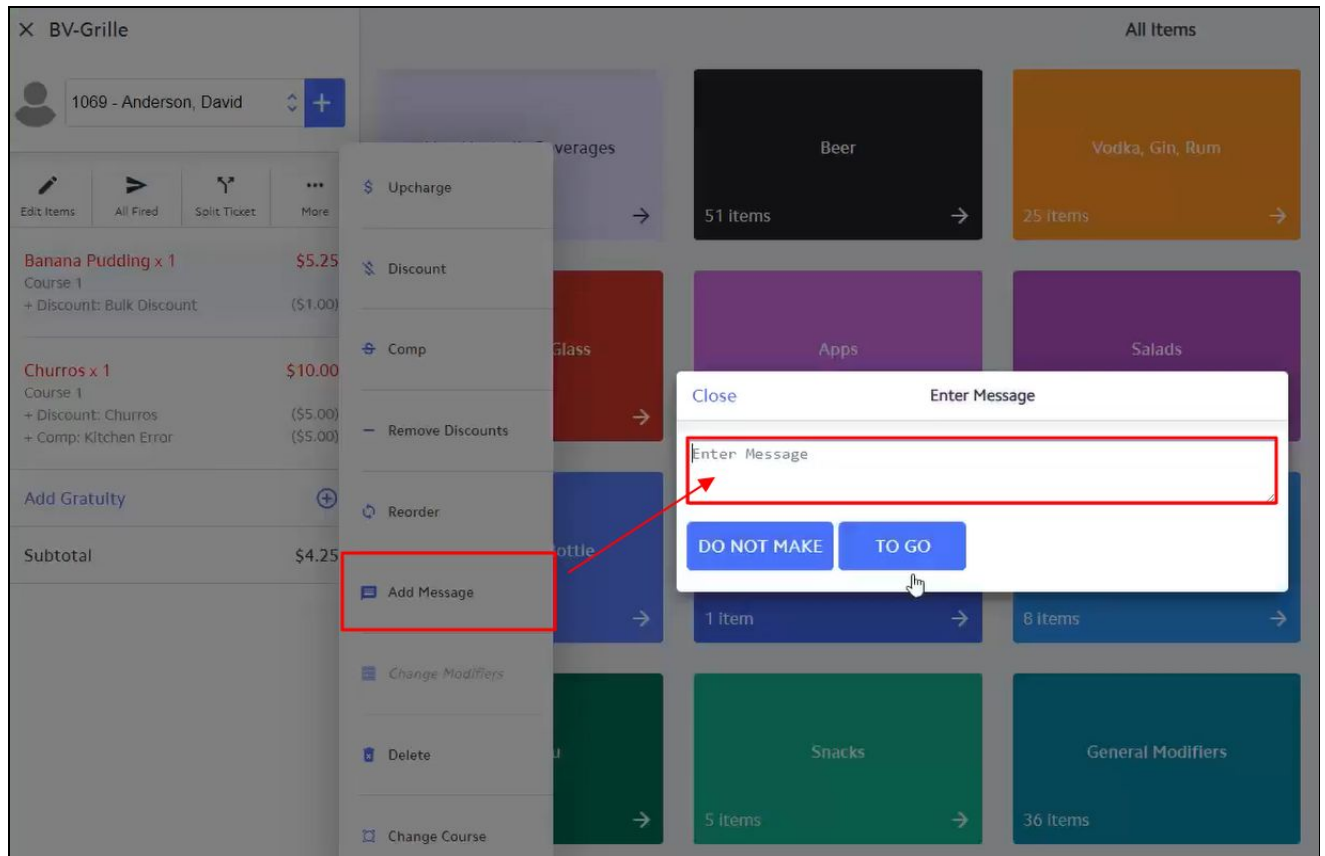
**Discounted Tickets Table:**

Ticket	Area	Created By	Discounted By	Member	Time Discounted	Amt
1065	BV-Grille	User, Administrative	User, Administrative	[CA9035] Brett, CCA Guest	8/13/2019 12:44:45 PM	(\$5.00)
1069	BV-Grille	User, Administrative	User, Administrative	[PCC093] Anderson, David	8/13/2019 1:01:55 PM	(\$1.00)
						(\$6.00)

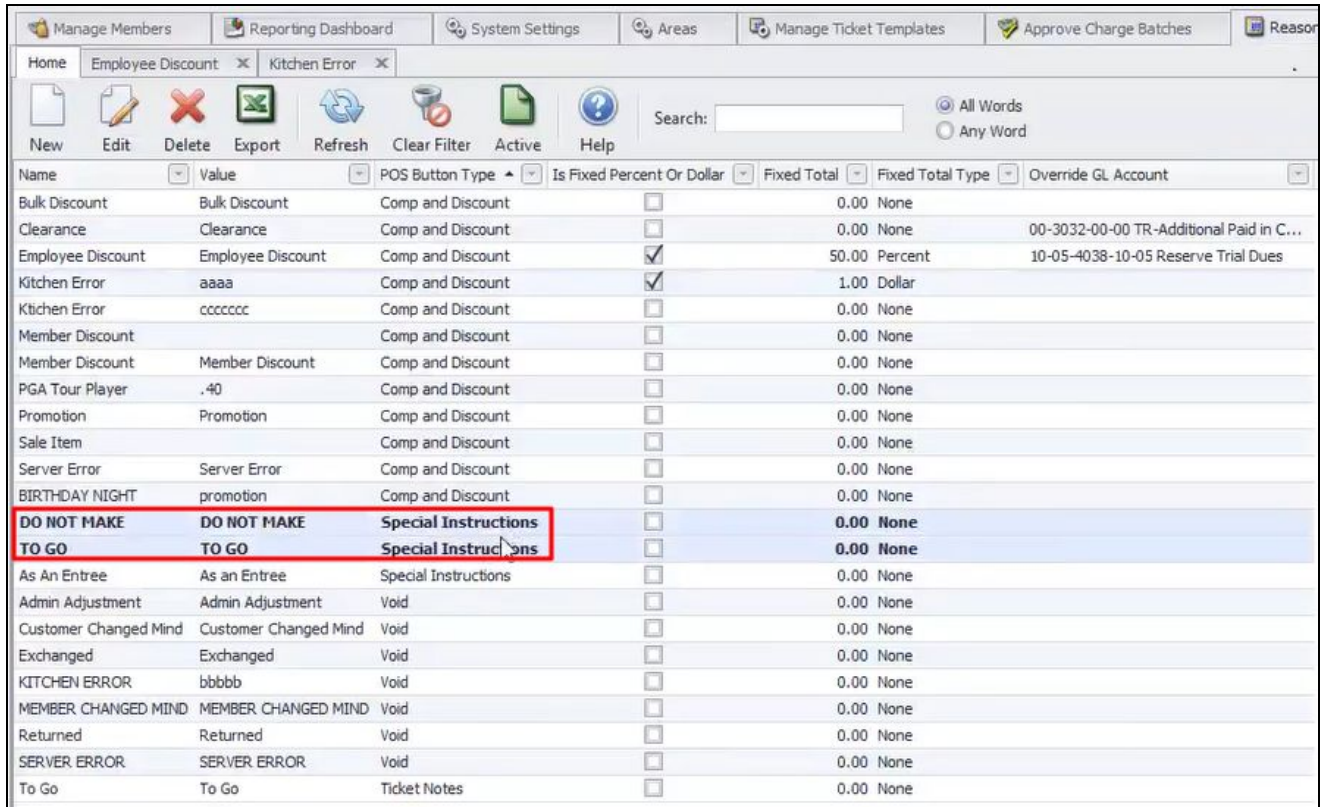
### Special Instruction Reason Codes

- **Added support for pre-set ticket item messages (Special Instruction reason codes) to Mobile POS.**

Use Case: Users can now add Special Instruction reason codes to tickets in Mobile POS by selecting **Add Message** on a ticket. These special instructions can be added/edited under POS > Reason Codes in CMA. Then added to applicable areas within the area settings.



The screenshot displays a POS system interface for a restaurant named "BV-Grille". On the left, a customer's order is visible, including items like "Banana Pudding x 1" and "Churros x 1", with a subtotal of \$4.25. A menu grid on the right shows various categories such as "Beer", "Vodka, Gin, Rum", "Glass", "Apps", "Salads", "Snacks", and "General Modifiers". A modal dialog titled "Enter Message" is open, featuring a text input field and two buttons: "DO NOT MAKE" and "TO GO". A red box highlights the "Add Message" option in the order summary, and a red arrow points from it to the "Enter Message" dialog.



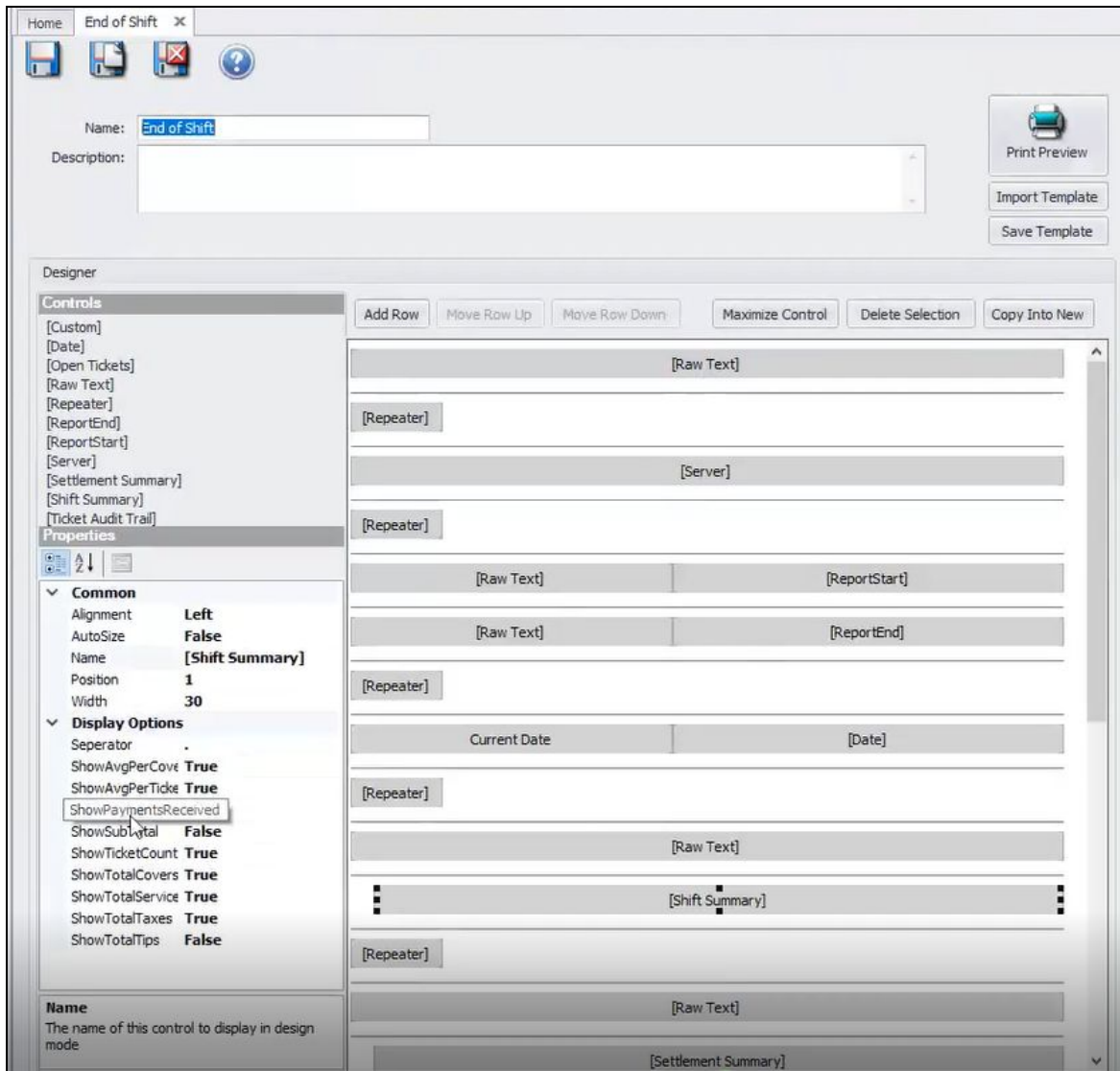
Name	Value	POS Button Type	Is Fixed Percent Or Dollar	Fixed Total	Fixed Total Type	Override GL Account
Bulk Discount	Bulk Discount	Comp and Discount	<input type="checkbox"/>	0.00	None	
Clearance	Clearance	Comp and Discount	<input type="checkbox"/>	0.00	None	00-3032-00-00 TR-Additional Paid in C...
Employee Discount	Employee Discount	Comp and Discount	<input checked="" type="checkbox"/>	50.00	Percent	10-05-4038-10-05 Reserve Trial Dues
Kitchen Error	aaaa	Comp and Discount	<input checked="" type="checkbox"/>	1.00	Dollar	
Kitchen Error	cccccc	Comp and Discount	<input type="checkbox"/>	0.00	None	
Member Discount		Comp and Discount	<input type="checkbox"/>	0.00	None	
Member Discount	Member Discount	Comp and Discount	<input type="checkbox"/>	0.00	None	
PGA Tour Player	.40	Comp and Discount	<input type="checkbox"/>	0.00	None	
Promotion	Promotion	Comp and Discount	<input type="checkbox"/>	0.00	None	
Sale Item		Comp and Discount	<input type="checkbox"/>	0.00	None	
Server Error	Server Error	Comp and Discount	<input type="checkbox"/>	0.00	None	
BIRTHDAY NIGHT	promotion	Comp and Discount	<input type="checkbox"/>	0.00	None	
<b>DO NOT MAKE</b>	<b>DO NOT MAKE</b>	<b>Special Instructions</b>	<input type="checkbox"/>	<b>0.00</b>	<b>None</b>	
<b>TO GO</b>	<b>TO GO</b>	<b>Special Instructions</b>	<input type="checkbox"/>	<b>0.00</b>	<b>None</b>	
As An Entree	As an Entree	Special Instructions	<input type="checkbox"/>	0.00	None	
Admin Adjustment	Admin Adjustment	Void	<input type="checkbox"/>	0.00	None	
Customer Changed Mind	Customer Changed Mind	Void	<input type="checkbox"/>	0.00	None	
Exchanged	Exchanged	Void	<input type="checkbox"/>	0.00	None	
KITCHEN ERROR	bbbb	Void	<input type="checkbox"/>	0.00	None	
MEMBER CHANGED MIND	MEMBER CHANGED MIND	Void	<input type="checkbox"/>	0.00	None	
Returned	Returned	Void	<input type="checkbox"/>	0.00	None	
SERVER ERROR	SERVER ERROR	Void	<input type="checkbox"/>	0.00	None	
To Go	To Go	Ticket Notes	<input type="checkbox"/>	0.00	None	

### End of Shift Report

- Updated the End of Shift report in Mobile POS to use the template defined in CMA.

Use Case: Previously, the End of Shift Report had a fixed layout. Now, additional improvements allow Users to define a template in CMA. This can be accessed from Manage Ticket Templates, then End of Shift Report, as seen below.

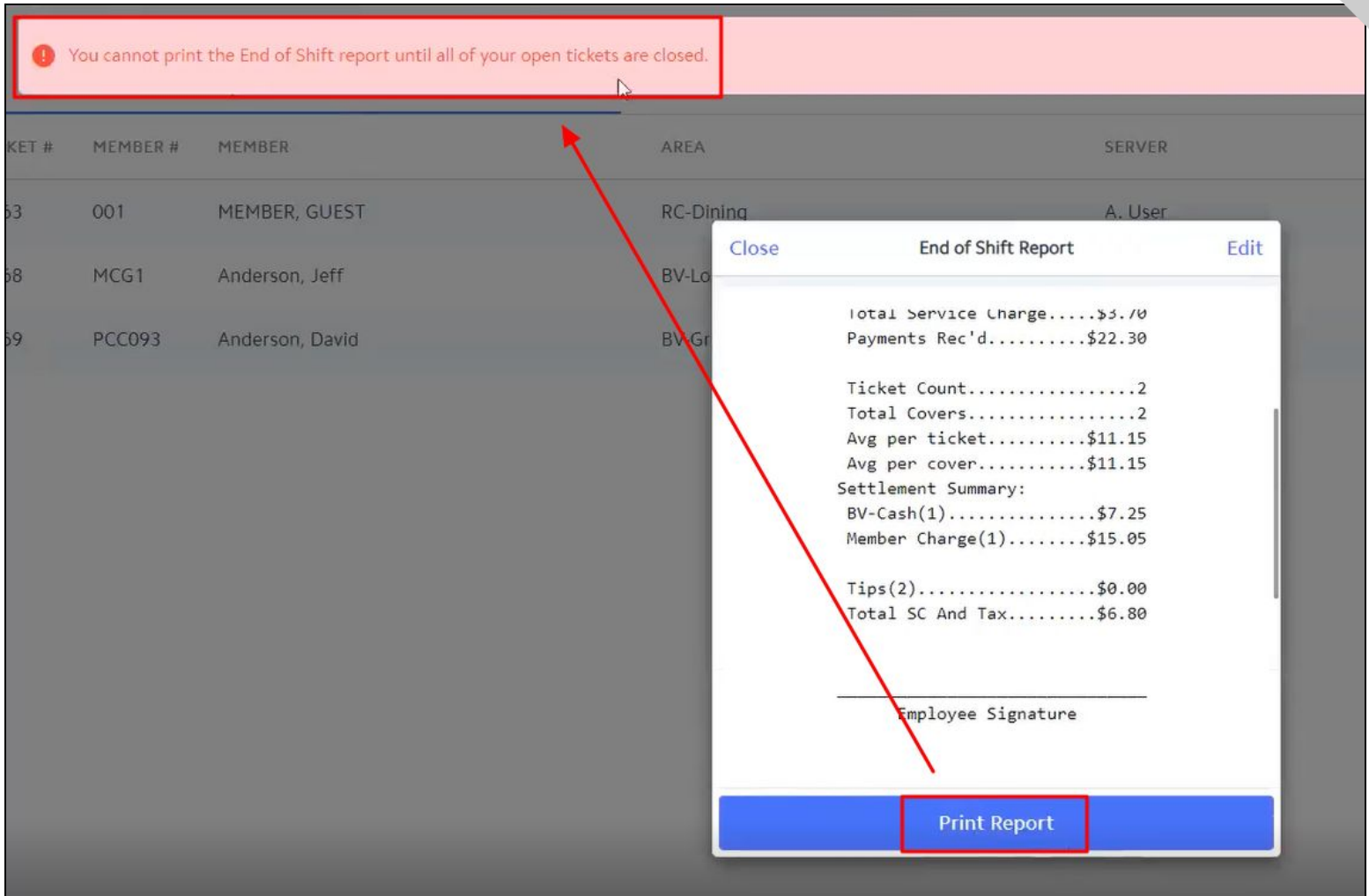




### End of Shift Report - Open Tickets

- **Added a prompt in Mobile POS when a server attempts to print their End of Shift report if they have any open tickets.**

Use Case: Users now must close or transfer any open tickets in Mobile POS before running/printing their End of Shift Report.



**Message:** You cannot print the End of Shift report until all of your open tickets are closed.

TICKET #	MEMBER #	MEMBER	AREA	SERVER
53	001	MEMBER, GUEST	RC-Dining	A. User
58	MCG1	Anderson, Jeff	BV-Lo	
59	PCC093	Anderson, David	BV-Gr	

Close      End of Shift Report      Edit

Total Service Charge.....\$3.70  
 Payments Rec'd.....\$22.30

Ticket Count.....2  
 Total Covers.....2  
 Avg per ticket.....\$11.15  
 Avg per cover.....\$11.15

Settlement Summary:  
 BV-Cash(1).....\$7.25  
 Member Charge(1).....\$15.05

Tips(2).....\$0.00  
 Total SC And Tax.....\$6.80

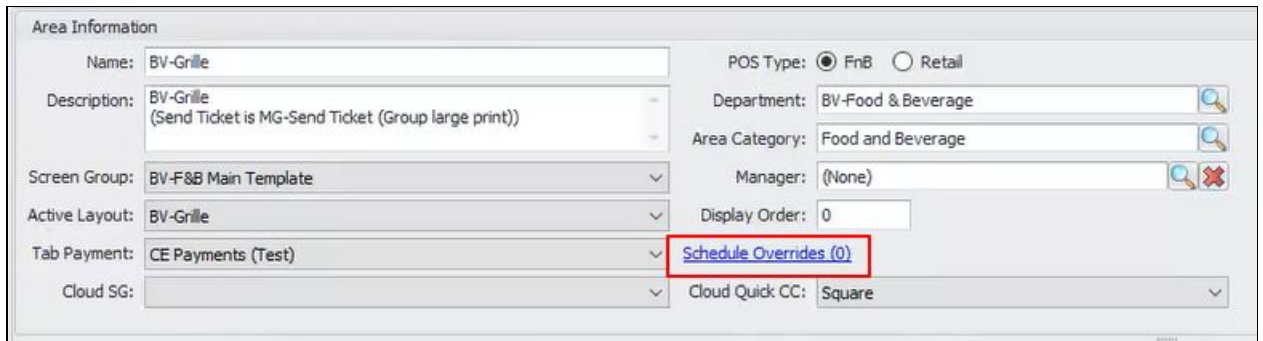
\_\_\_\_\_  
 Employee Signature

**Print Report**

### Screengroups

- **Added Area Screengroup Override support to Mobile POS.**

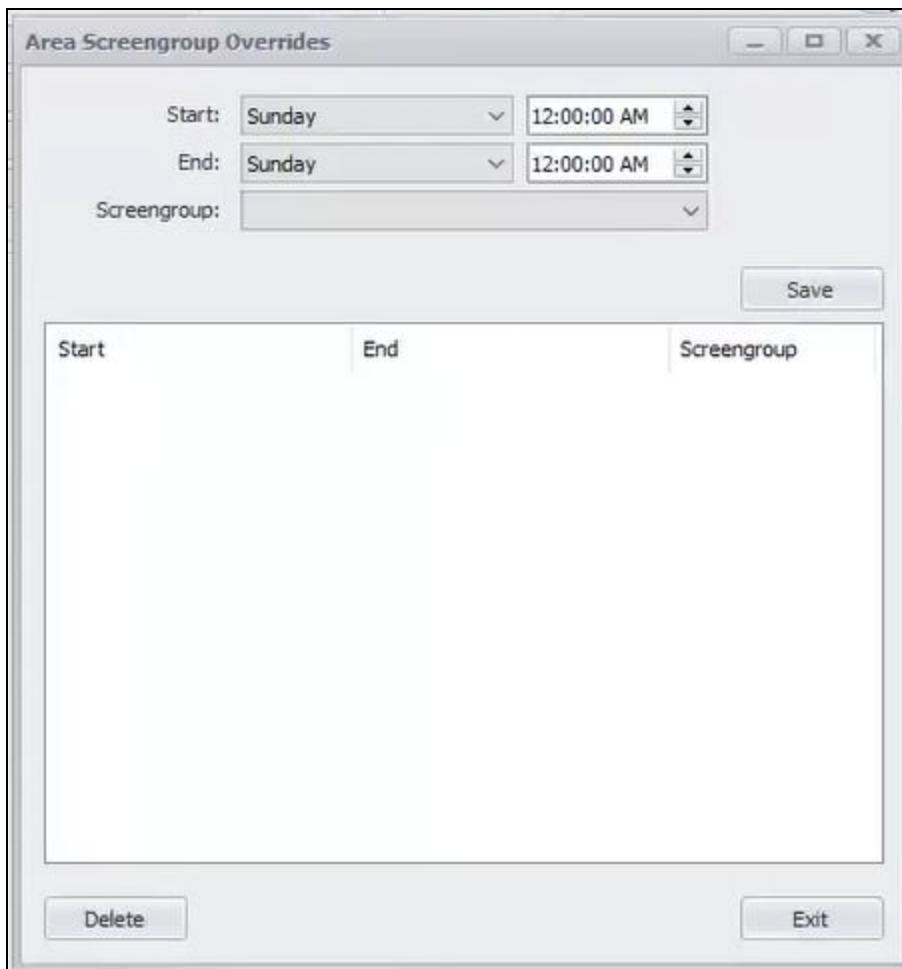
Use Case: Users can now specify Screengroup Overrides for certain times of the day within Area settings, Settlement Overrides, and then Schedule Overrides. This setting allows Users to show different Menus dependent on the time of day (i.e. breakfast, lunch, dinner, happy hour, etc.)



The 'Area Information' form contains the following fields and values:

- Name: BV-Grille
- POS Type:  FnB  Retail
- Description: BV-Grille (Send Ticket is MG-Send Ticket (Group large print))
- Department: BV-Food & Beverage
- Area Category: Food and Beverage
- Screen Group: BV-F&B Main Template
- Active Layout: BV-Grille
- Manager: (None)
- Display Order: 0
- Tab Payment: CE Payments (Test)
- Cloud SG: [Empty]
- Cloud Quick CC: Square

The 'Schedule Overrides (0)' link is highlighted with a red box.



The 'Area Screengroup Overrides' dialog box includes the following controls:

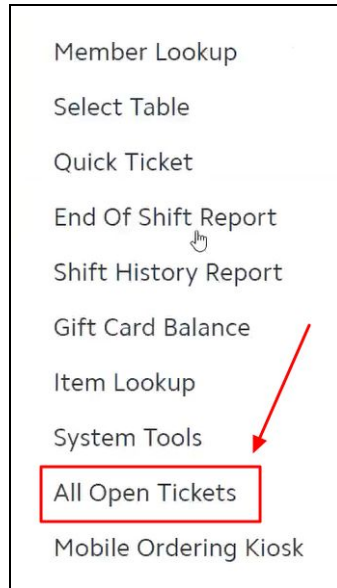
- Start: Sunday, 12:00:00 AM
- End: Sunday, 12:00:00 AM
- Screengroup: [Empty]
- Buttons: Save, Delete, Exit

Start	End	Screengroup
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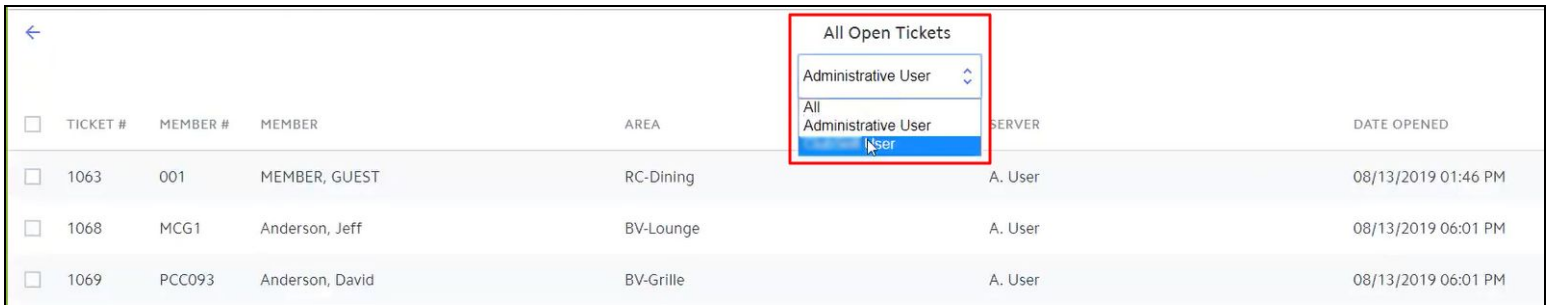
## Tickets

- **Added an “All Open Tickets” view in Mobile POS.**

Use Case: Users can now access all open tickets across the whole Mobile POS system from the left-hand flyout menu. Previously, Users could only view their own open tickets or open tickets for that specific Area.



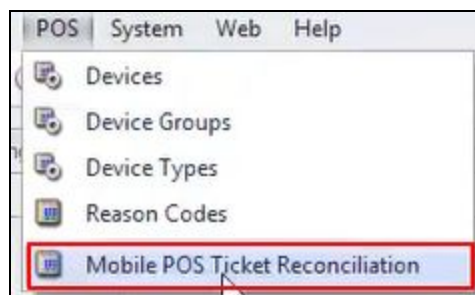
The added dropdown at the top of the All Open Tickets screen allows Users to select which User (or All) that they wish to view.



### Security - Mobile POS Ticket Reconciliation

- **Added a security role to the Mobile POS Ticket Reconciliation feature in CMA.**

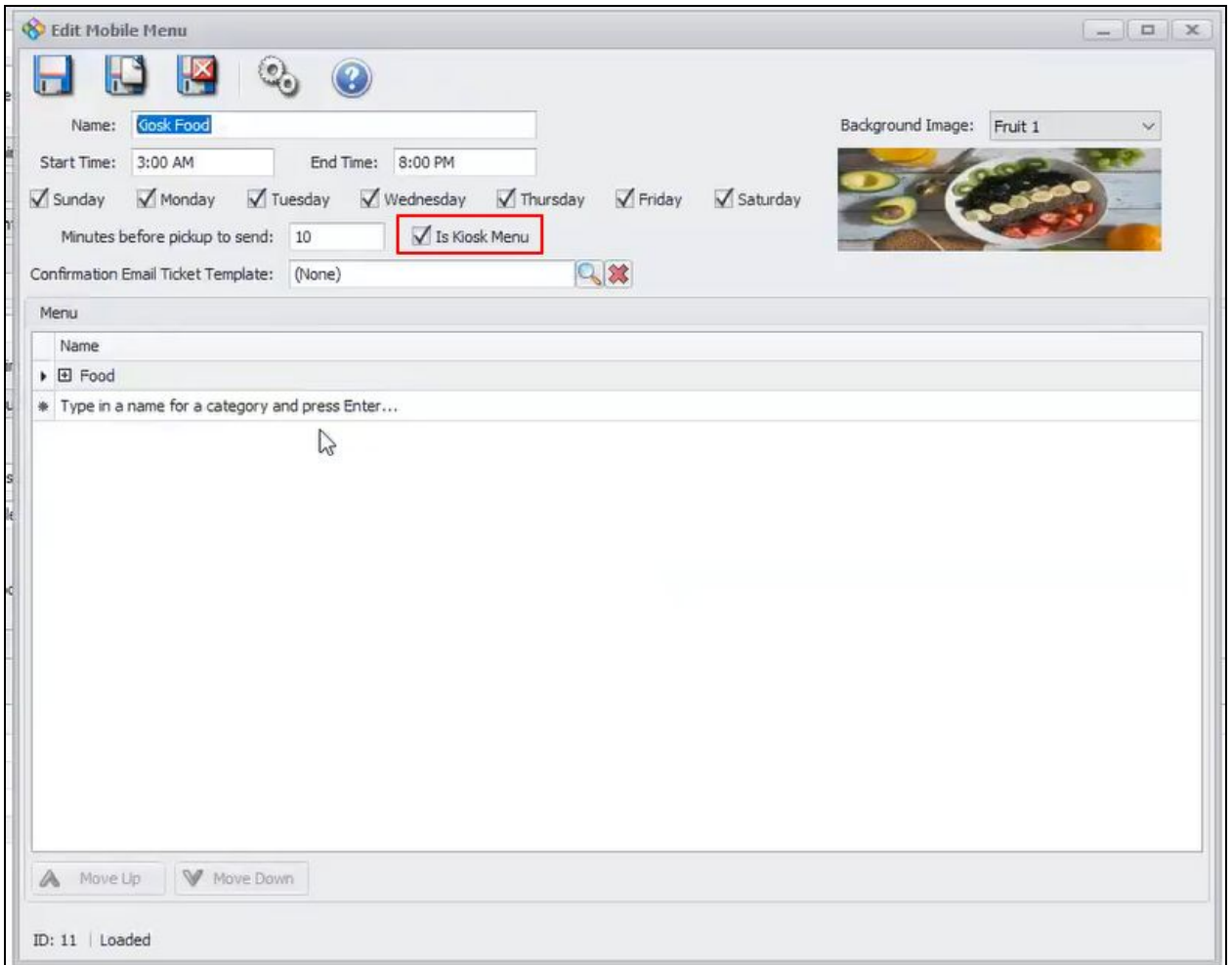
Use Case: All Users could previously reconcile Mobile POS tickets, now Users can specify who can access the Mobile POS Ticket Reconciliation.



## Mobile Ordering

- **Added the ability to specify Mobile Ordering menus as either Mobile App or Kiosk.**

Use Case: Clubs using Kiosk Mode for Mobile Ordering can now limit what menus Members can access in the Kiosk system. Now, when creating a Menu in CMA, Users can specify whether or not it is a Kiosk Menu by checking the **Is Kiosk Mode** setting when editing a menu, determining if the Member will see it on the Mobile App or on the Kiosk.



**Edit Mobile Menu**

Name:

Start Time:  End Time:

Sunday  Monday  Tuesday  Wednesday  Thursday  Friday  Saturday

Minutes before pickup to send:   **Is Kiosk Menu**

Confirmation Email Ticket Template:

Background Image:

Menu

Name
Food
* Type in a name for a category and press Enter...

Move Up Move Down

ID: 11 | Loaded

## Bug Fixes/Other

- Fixed an issue where applying a multi-item discount with a custom % in Mobile POS was not applying as a user would expect.
- Fixed an issue where the Credit Ticket and Post feature was not factoring in discounts.
- Fixed an issue in Mobile POS where searching for names with an apostrophe (') did not work.
- Fixed an issue in CMA where members could join multiple groups of a type of "Only One".