Office - 8.19.19 Release

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Enhancements

CE Payments

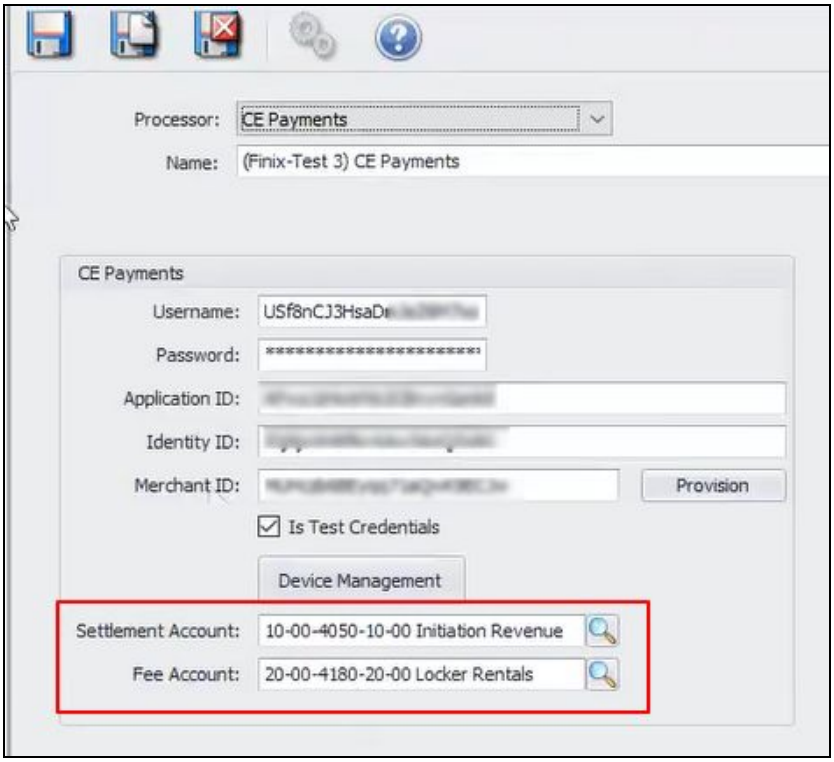
Settlement/Fee Accounts

- **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.

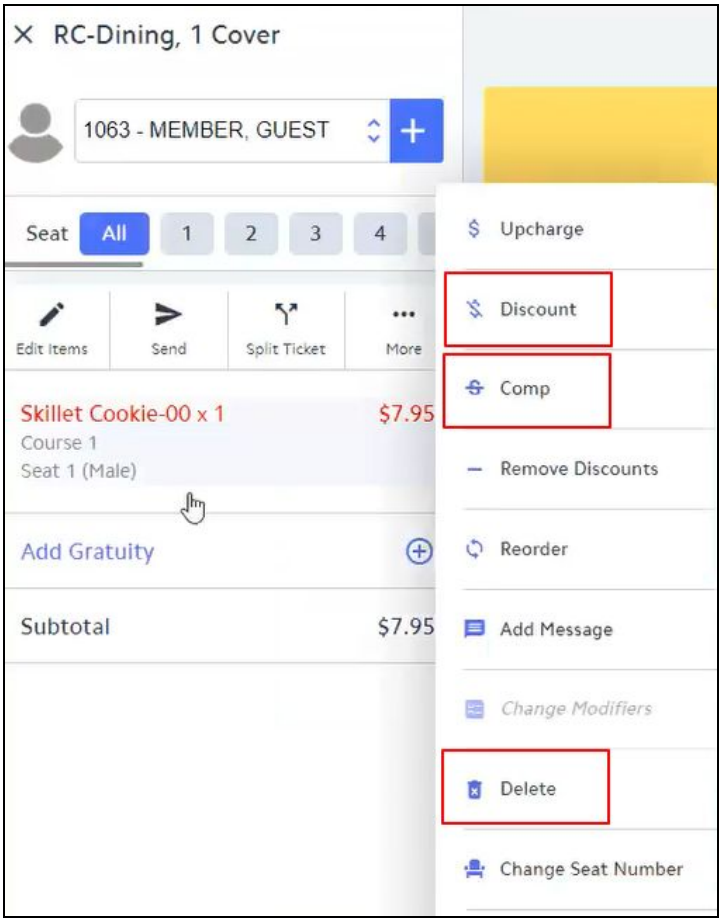


Mobile POS

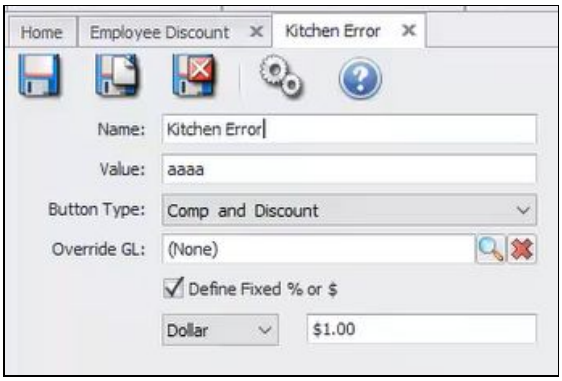
Reason Codes

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

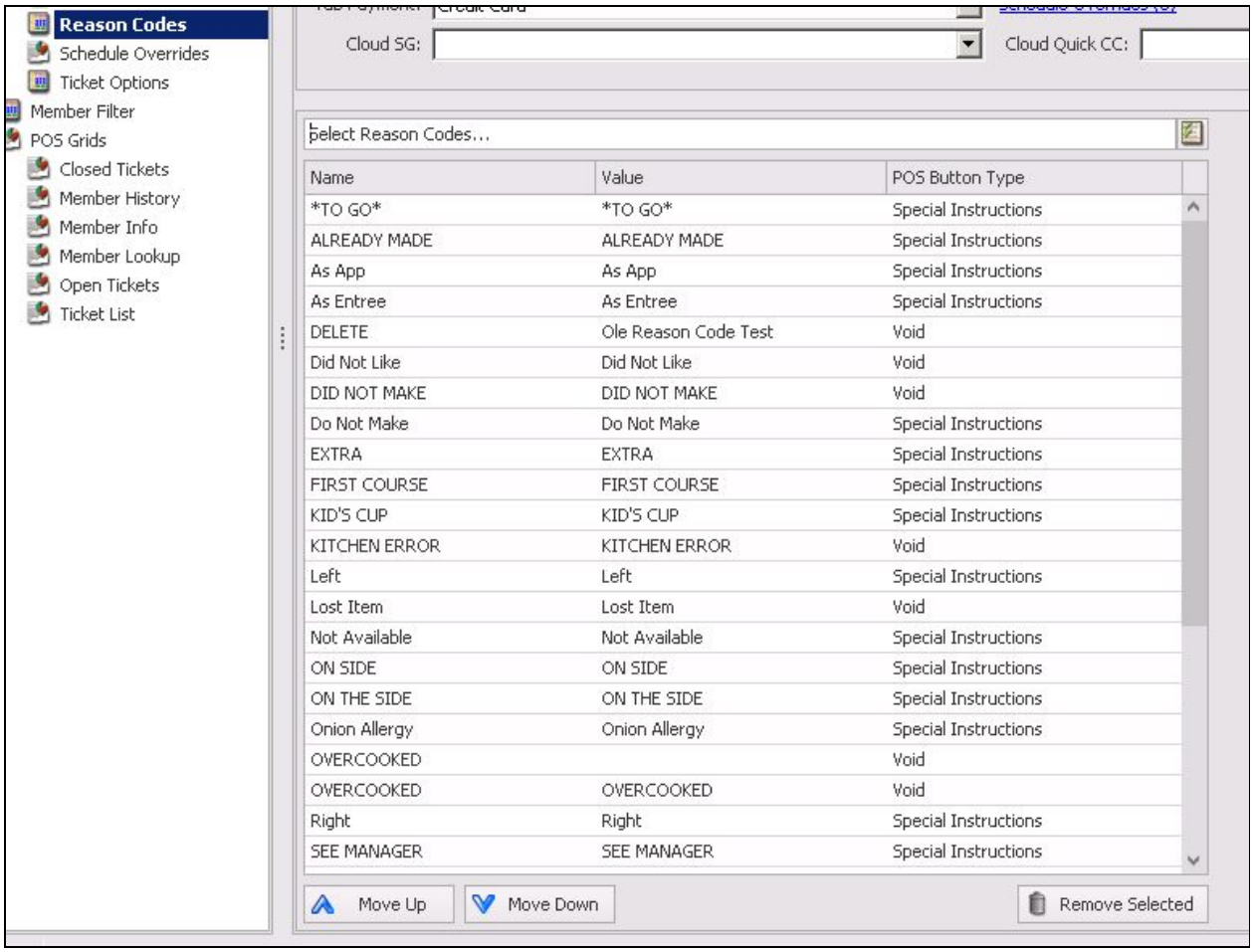
  Use Case: Mobile POS now supports reason codes added by Area in CMA. Now, Users can set reason codes for each Area and they will populate in Mobile POS when Users Discount, Void, or Comp an Item, example shown below.



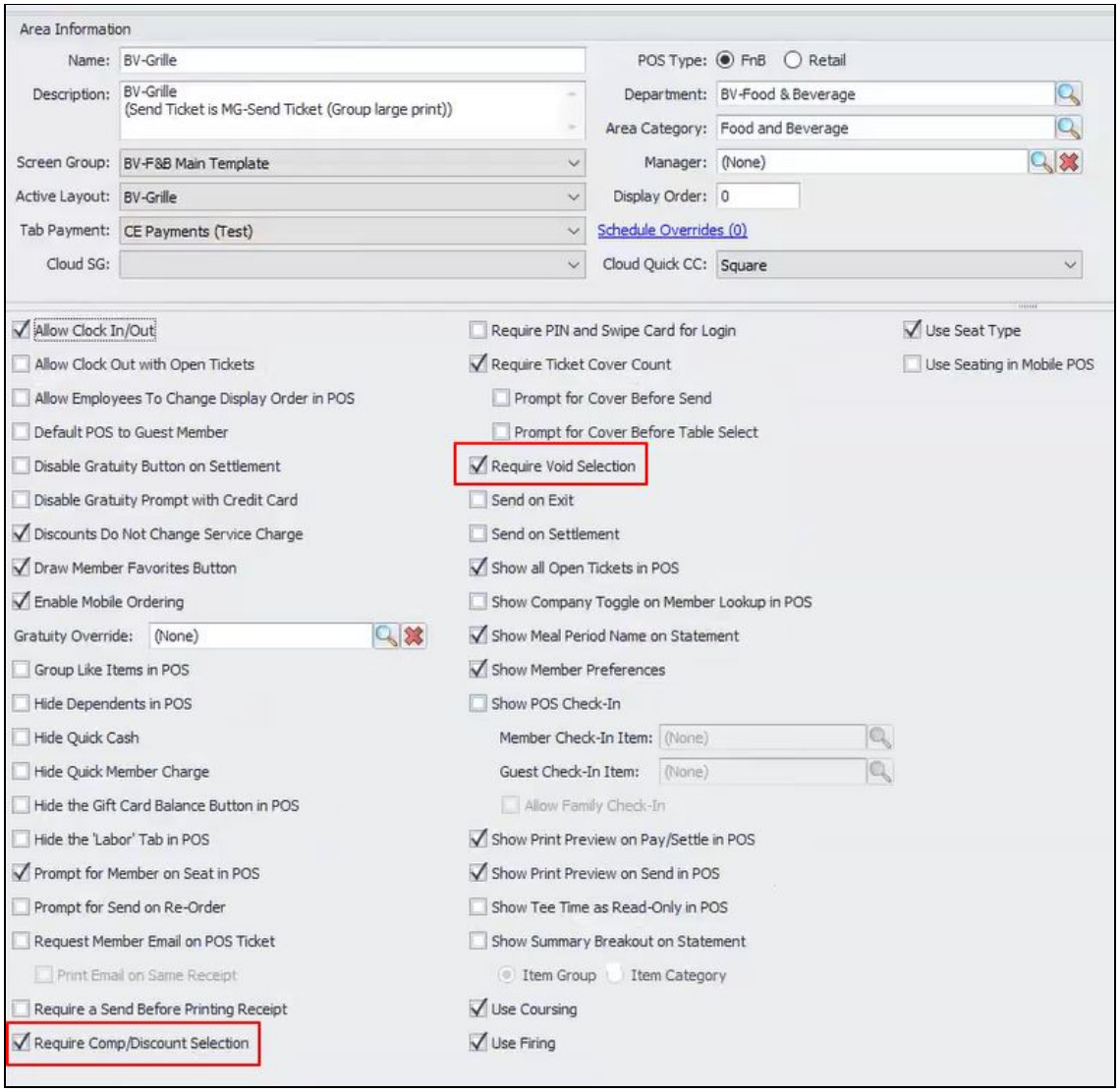
When setting up Reason Codes in CMA, users can select the type of discount, description, and fixed amount or percentage.



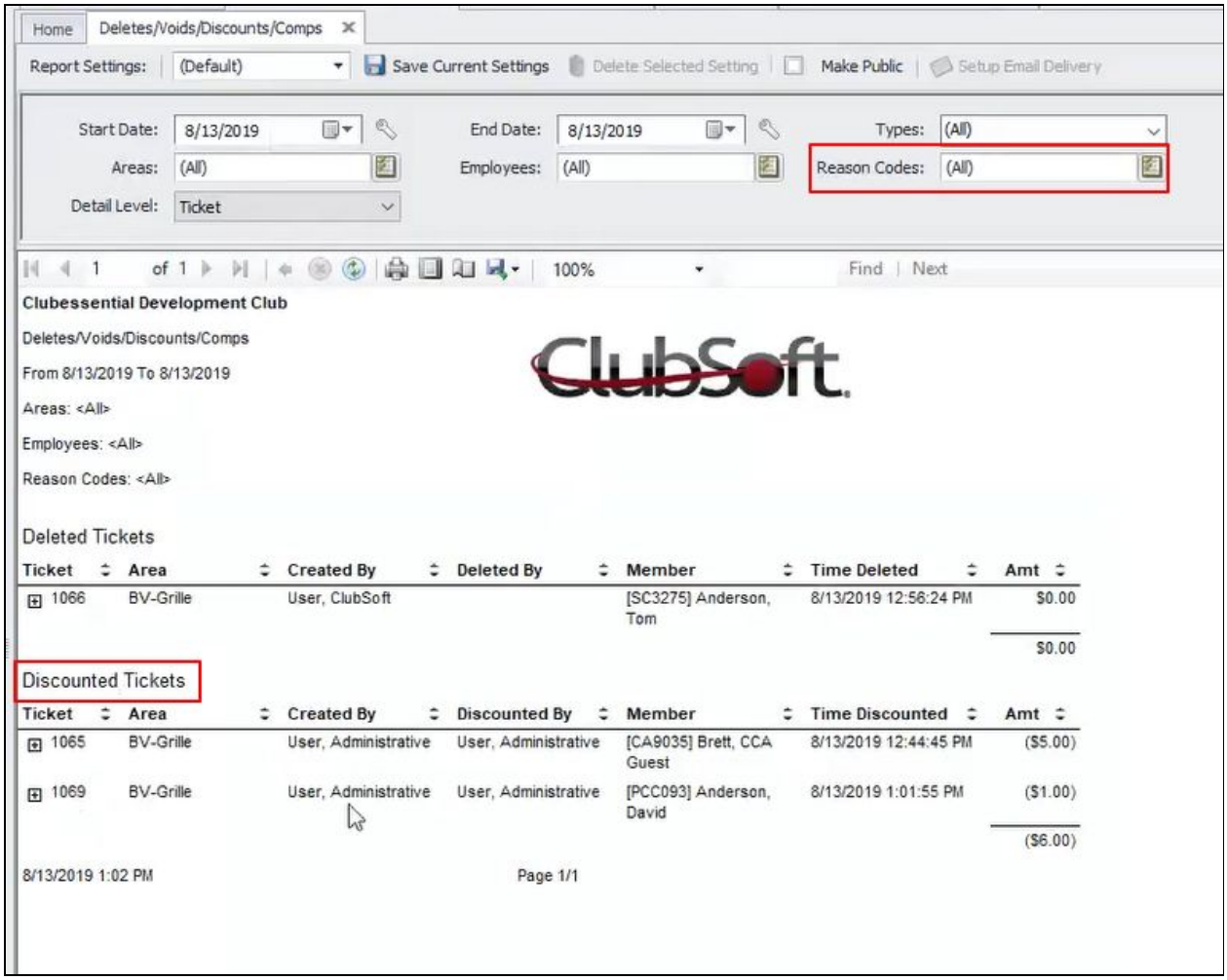
Please Note: *Applicable reason codes will need to be added to their respective areas within CMA Area settings ➔ Reason Codes in order for the reason codes to show.*



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.*



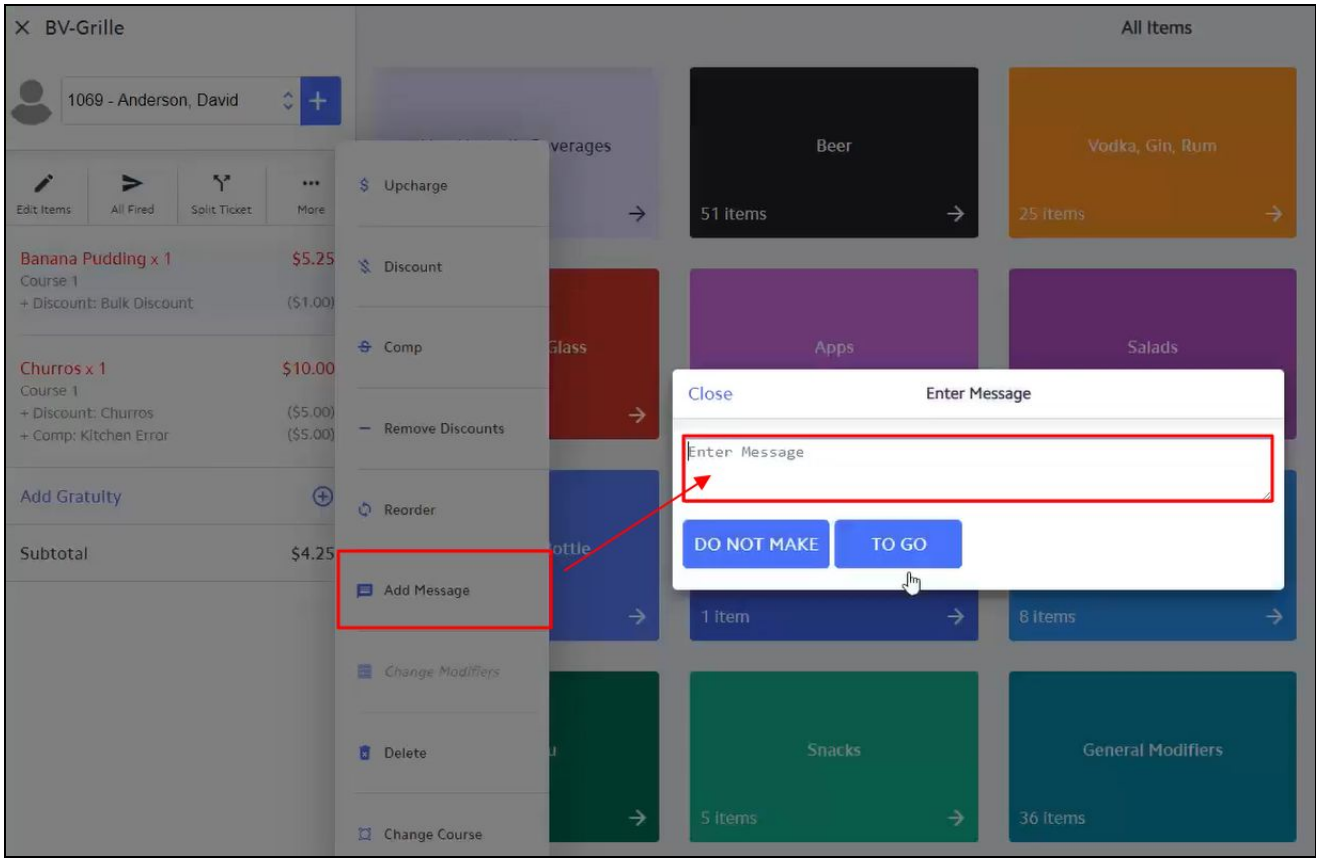
Additionally, the **Deletes/Voids/Discounts/Comps report** can be filtered by Reason Code, and Mobile POS tickets with Reason Codes will show categorized by the type of adjustment. Seen below.

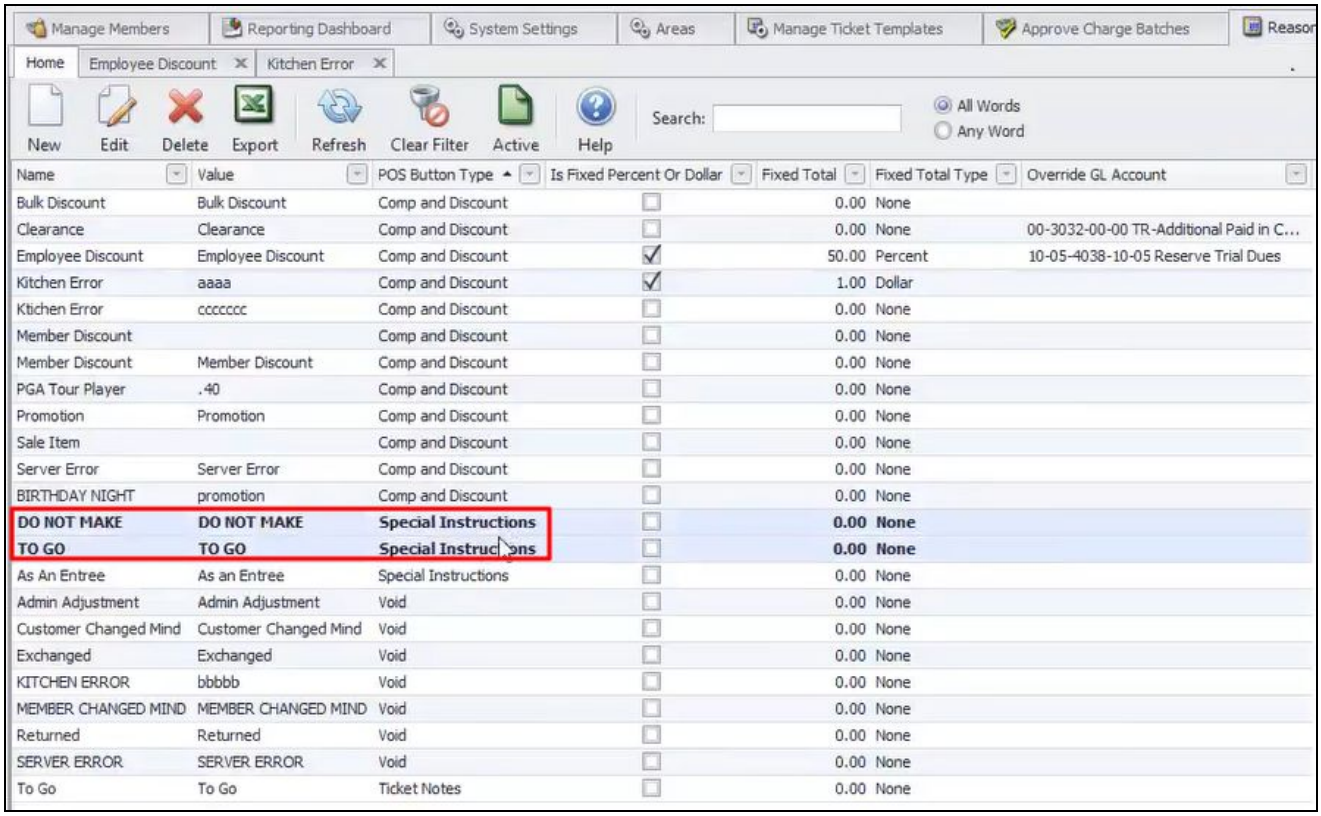


Special Instruction Reason Codes

- **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.


BV-Grille
1069 - Anderson, David
Edit Items
All Fired
Split Ticket
More
Banana Pudding x 1
$5.25
Course 1
+ Discount: Bulk Discount
($1.00)
Churros x 1
$10.00
Course 1
+ Discount: Churros
($5.00)
+ Comp: Kitchen Error
($5.00)
Add Gratuity
Subtotal
$4.25
Upcharge
Discount
Comp
Remove Discounts
Reorder
Add Message
Change Modifiers
Delete
Change Course
All Items
Beer
51 items
Vodka, Gin, Rum
25 items
Apps
Salads
1 item
8 items
Snacks
5 items
General Modifiers
36 items
Close
Enter Message
Enter Message
DO NOT MAKE
TO GO

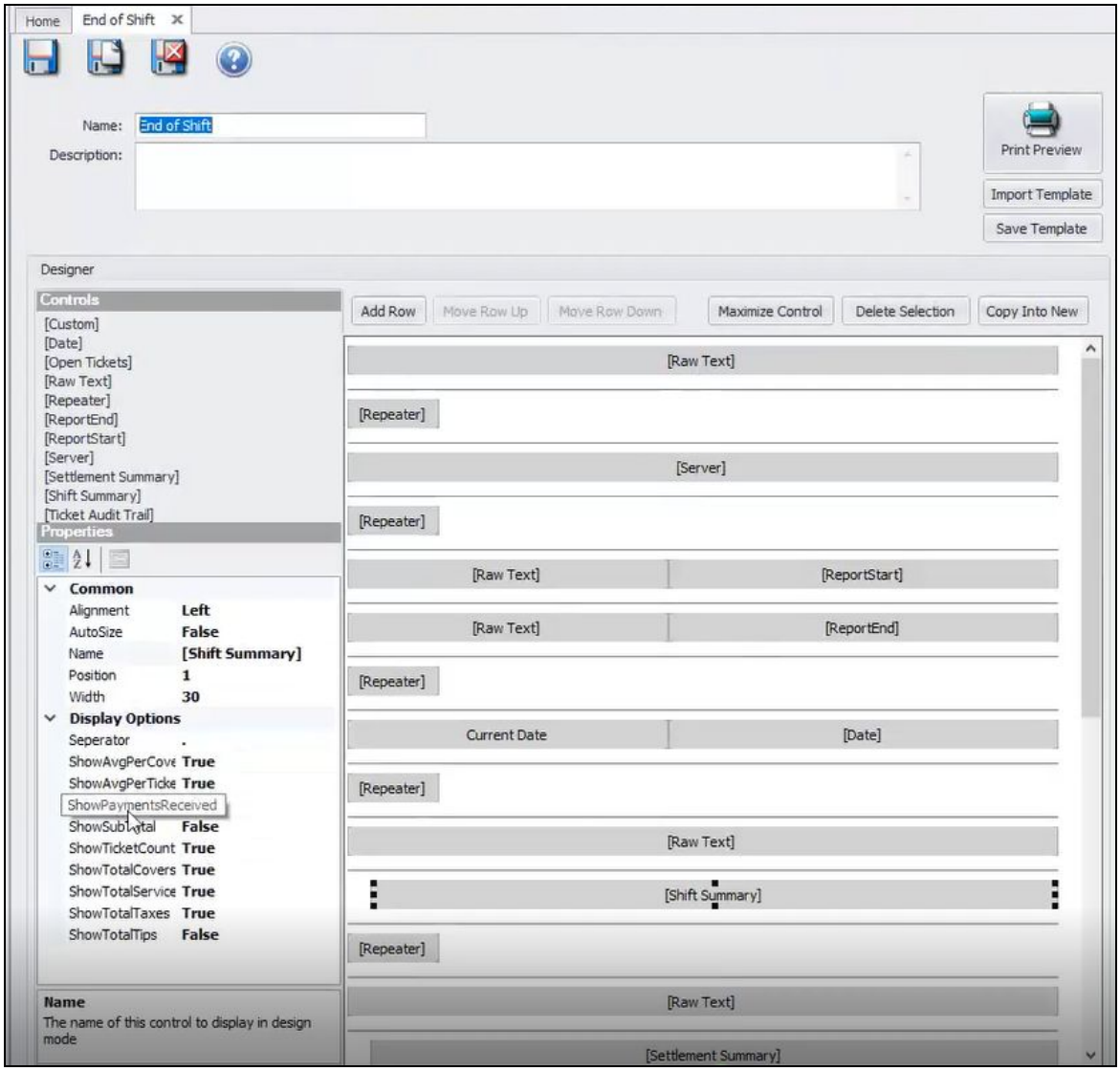


Name	Value	POS Button Type	Is Fixed Percent Or Dollar	Fixed Total	Fixed Total Type	Override GL Account
Bulk Discount	Bulk Discount	Comp and Discount	☐	0.00	None	
Clearance	Clearance	Comp and Discount	☐	0.00	None	00-3032-00-00 TR-Additional Paid in C...
Employee Discount	Employee Discount	Comp and Discount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

End of Shift Report

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

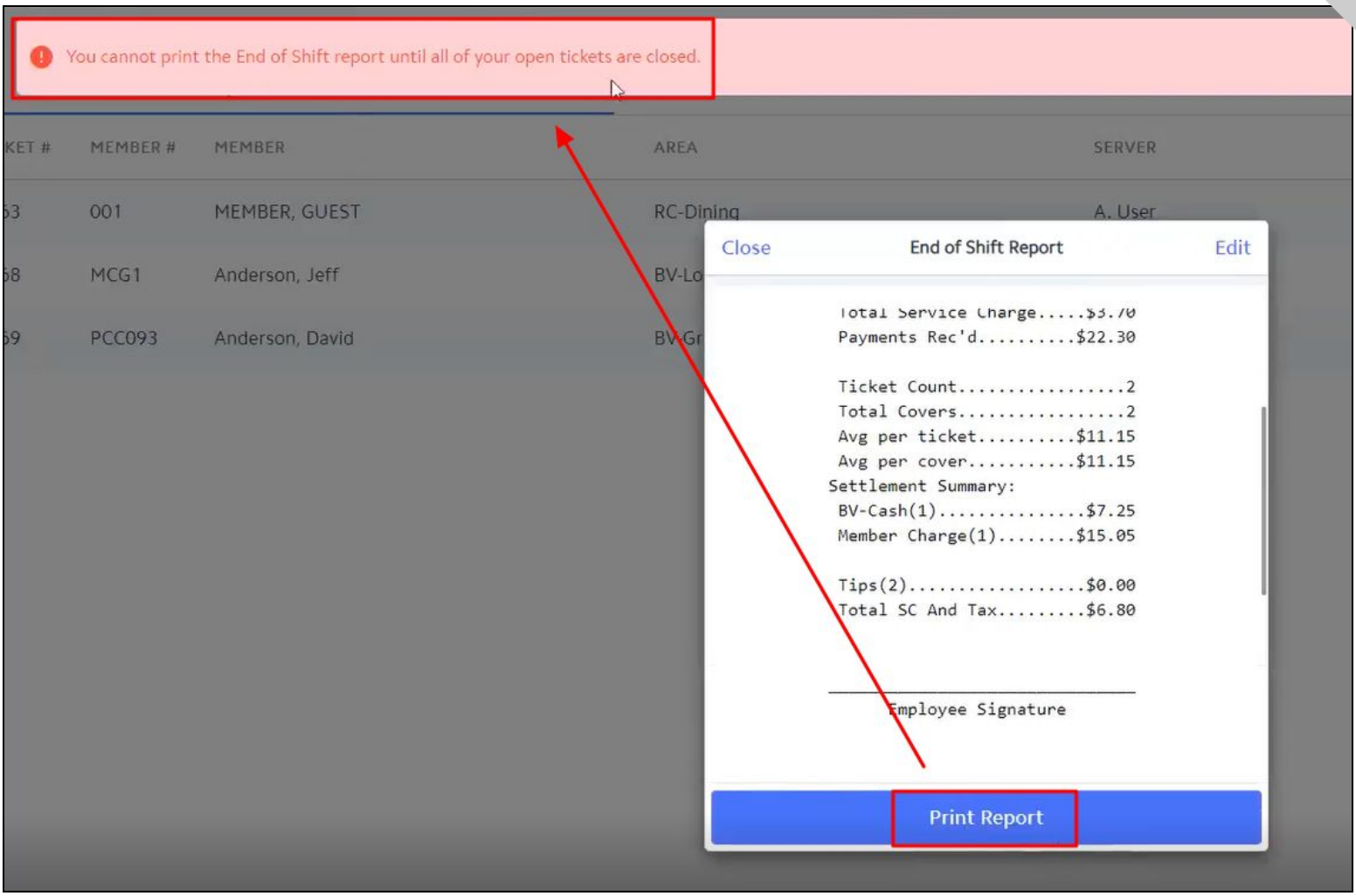
  Use Case: Previously, the End of Shift Report had a fixed layout. Now, additional improvements allow Users to define a template in CMA. This can be accessed from Manage Ticket Templates, then End of Shift Report, as seen below.



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.**

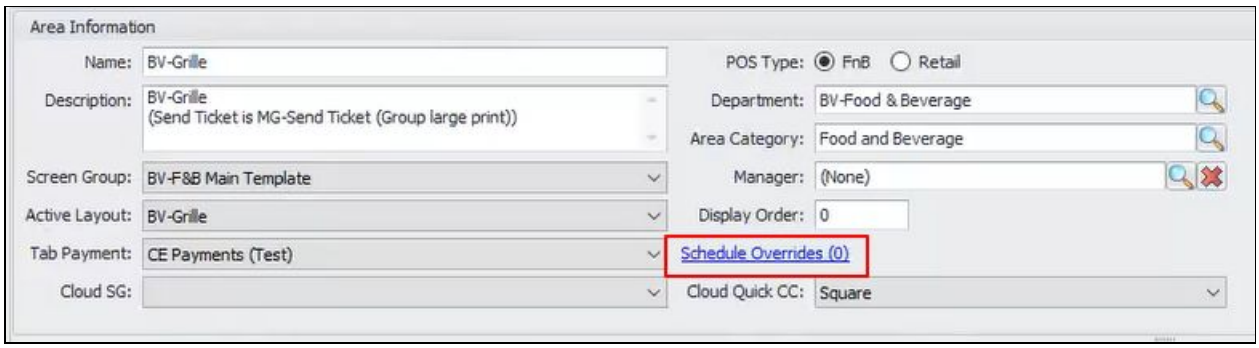
  Use Case: Users now must close or transfer any open tickets in Mobile POS before running/printing their End of Shift Report.

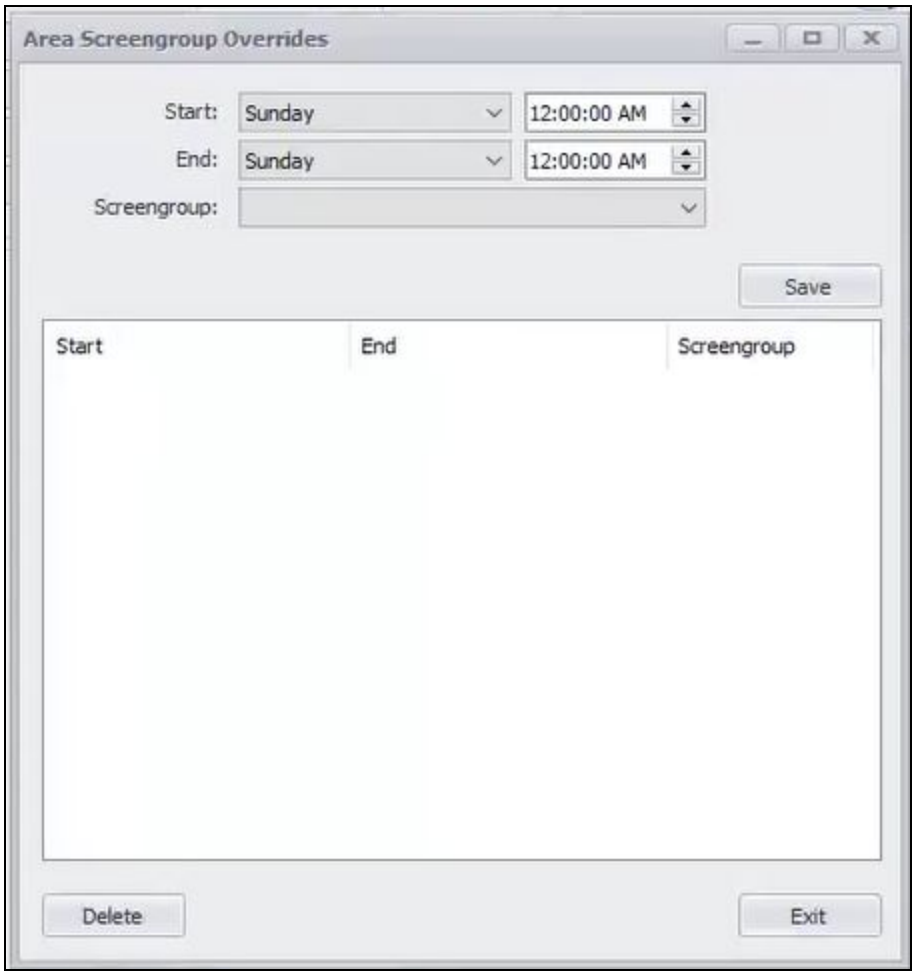


Screengroups

- **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.)

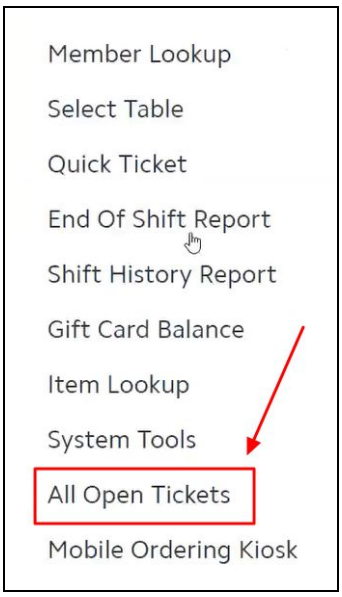




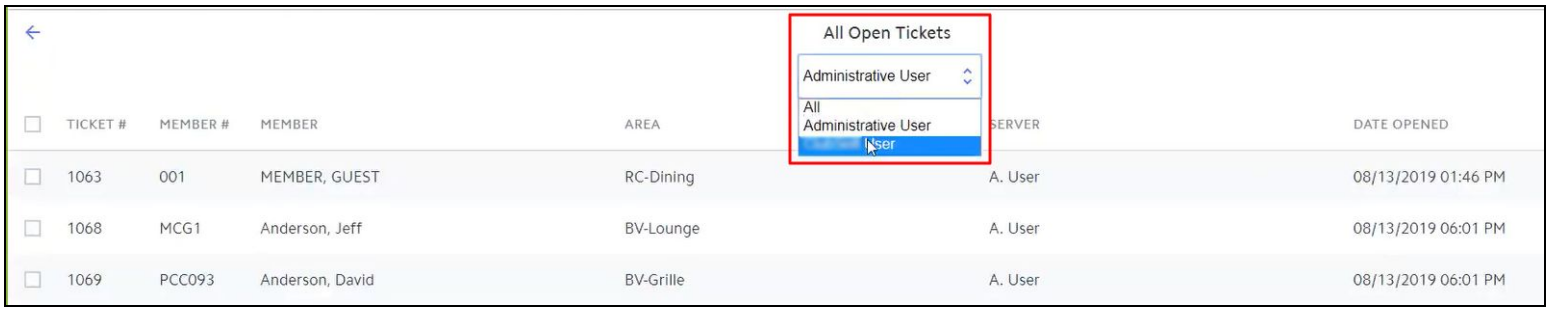
Tickets

- **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.



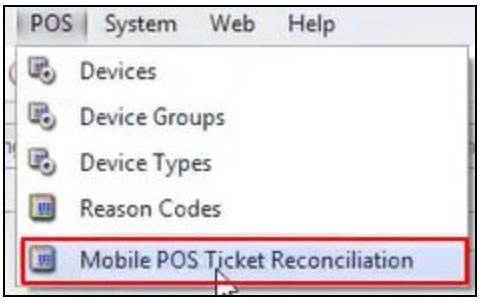
The added dropdown at the top of the All Open Tickets screen allows Users to select which User (or All) that they wish to view.



Security - Mobile POS Ticket Reconciliation

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

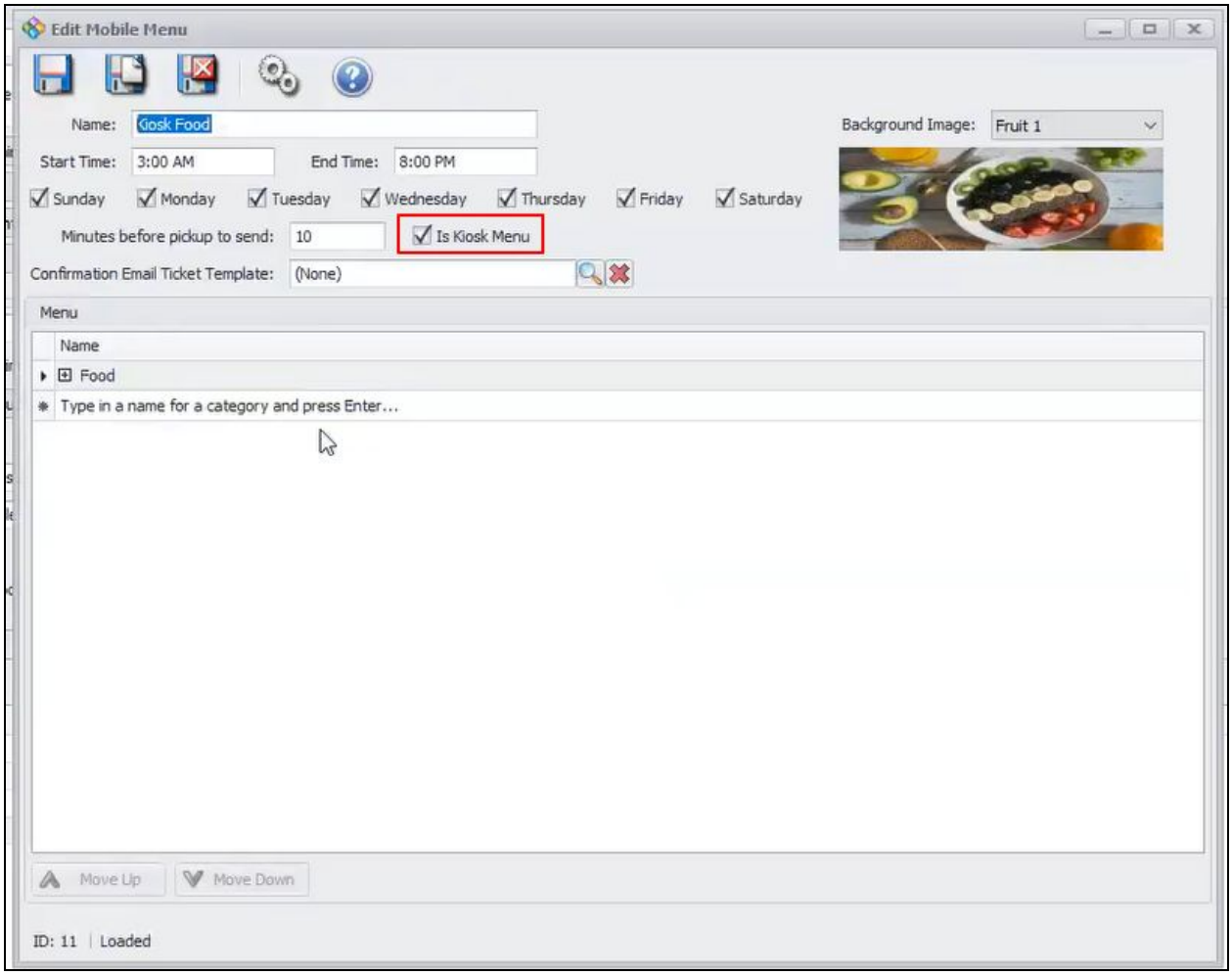
  Use Case: All Users could previously reconcile Mobile POS tickets, now Users can specify who can access the Mobile POS Ticket Reconciliation.



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.



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”.