General Contractions of the Contract Co

The Classic POS/CMA Microsoft security certificate has been renewed. Some users may be required to accept the certificate upon downloading this update. <u>Please reference this</u> <u>document for instructions.</u>

Enhancements

Mobile POS

Mobile Ordering

<u>CMA</u>

Bug Fixes

Enhancements

Mobile POS

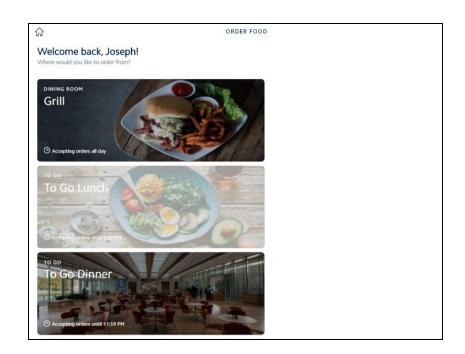
• SSO into Mobile Ordering

<u>Use Case</u>: Users can now Single Sign On into Mobile Ordering directly from Member Details within Mobile POS! This allows you to impersonate a member and access the Mobile Ordering menus to submit an order. By doing so, these orders count toward your maximum orders allotted per interval, which can be helpful when also accepting phone-in orders. This is also helpful when testing/configuring new Mobile Ordering Menus.

Just Search for a Member using Member Lookup, and tap on the shopping cart icon to impersonate them and place a Mobile Order.

Note: Menus with a gray overlay are not currently visible to members.

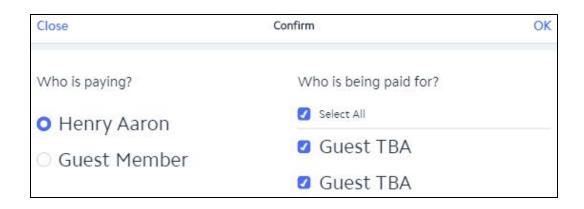
se	Member Deta	ils 📜
Josep	h Antorini	
MEMBER SUMMARY		
Member Number	Туре	Birthdate
109	Full Family	September 7, 1953
Minimum	MAP Score	
• Favorites Hi	story Prefs Cre	edit Book
MEMBER GROUPS		
58232, 5823522, Bil	ling Members, Hole In One	, Roster Visible



• Tee Times - Create Ticket for Reserver

<u>Use Case</u>: Users can now easily create a ticket for the Reserver member on a Tee Time, even if that member is not a player on the reservation. Clicking "Create Ticket" or "Member Charge" will now list the Reserver as an option for charging.

	Henr	y Aaron	
Guest TBA	Guest TBA	Guest TBA	Guest TBA
18	18	18	18
Weekday Guest Round \$35.00 18 Hole Cart \$16.00			



• Tee Times - Manual Refresh

<u>Use Case</u>: This new button gives users the ability to quickly refresh the Mobile POS Tee Sheet after making a change in Axis.

(**Note:** The Mobile POS Tee Sheet will refresh automatically every 30-60 seconds. The Course Toggle has been moved to the center of the Tee Sheet)

=				Pro (Owned Golf	Shop				A. User
		E Crea	te Ticket				💄 Me	mber Cha	rge	
<	THURS Aug 6	FRI Aug 7	SAT Aug 8	SUN Aug 9	MON Aug 10	TUES Aug 11	WED Auro 12	>	1	c
			We	ed, Aug	12 - Nort	h Cours	e×			٩
4:5	0 PM			No	orth Coui	ςρ.				
5:0	0 PM									
5:1	0 PM			So	uth Cour	se				
5:2	0 PM									

• Tee Times - Auto Scroll

<u>Use Case</u>: The Tee Sheet will now autoscroll to the current time upon opening the Tee Times tab.

• Tee Times - Select All Option

<u>Use Case</u>: A "Select All" option has been added when selecting which Member's Tee Times are being paid for so that you can quickly check off all players in a large list.

Close	Confirm	OK
Who is paying?	Who is being paid for?	
Henry Aaron	Select All	
O Guest Member	Guest TBA	
	Guest TBA	

• Tee Times - Delete Ticket

<u>Use Case</u>: The delete ticket option on the Mobile POS Tee Sheet has been updated to respect the "Delete Closed Ticket" security permission in CMA. Users without this

permission will be prompted to enter the PIN of an employee with appropriate permissions.

Inherited from group Insufficient permission Category: POS Terminal	
Name	Category
Allow System Tools	POS Terminal
Change Other Servers Tickets	POS Terminal
Comp Ticket	POS Terminal
Create Ticket	POS Terminal
Delete Closed Ticket	POS Terminal
Discount Ticket	POS Terminal

Close	Authorize	ОК
Enter the PIN (of an employee with De permissions.	lete Closed Ticket
7	8	9
4	5	6
1	2	3
	0	

Mobile Ordering

• Order Accepting Availability Times

<u>Use Case</u>: Order accepting start/end times were updated so that they reflect exactly what the user configures in CMA. Previously, the first/last accepting times factored in "Minutes Before Pickup to Send".

CMA

• CE Payments Settlement Report - All Unsettled Filter

<u>Use Case</u>: The CE Payments Settlement Report can now be filtered to show "All Unsettled" transactions for the Funds in Transit account(s) selected to make reconciling the account easier. Previously, users would have to run Card Present (Unsettled Tickets) and Card Not Present (Unsettled Payments) reports separately.

Home CE P	aymentSettlements 🗙				
Report Setting	gs: (Default)	🔹 🔚 Save Current Settings 📲	Delete Selected Setting 🛛 🗖 M	Iake Public 🛛 🧭 Setup Er	mail Delivery
Start Date:	8/13/2020 💽 🔨	End Date: 8/13/2020	💽 🔨 Endpo	pints: (All)	
Filter By:	All Transactions	Group By: Transactions	Funds in Transit Acco	unts: (All)	
	All Transactions All Unsettled				
	All Payments All Tickets)		Find Next	
	Settled Payments Unsettled Payments			1.10 1 1.275	
	Settled Tickets Unsettled Tickets				

• PayCloud Cash Receipts - Default A/R

<u>Use Case</u>: Payments that sync from PayCloud will now respect the "Default A/R" configured in Cash Receipt Type setup. The system will first apply payments to the A/R accounts defined in System Settings > Accounts Receivable > "Order to Apply Payments". If the member does not have a balance in these accounts, or has an excess payment, the system will apply the payment (or remaining payment balance) to the default A/R.

Home PayCloud AC	
Edit Cash Receipt Ty	Ser 200 100 100 100 100 100 100 100 100 100
Edit Cash Receipt Ty	pes
Name:	PayCloud ACH
Description:	PayCloud ACH
Debit Account:	00-111 CE Payments Funds in Transit
Default AR Account:	00-120 Accounts Receivable
Payment Type:	PayCloudACH

• Guest Rooms - Email From Address

<u>Use Case</u>: Users can now define a specific "Email From" address for Guest Rooms notifications.

🍪 General	Guest Room Settings		
S Accounting	Default Member Rate:	Member	
🆚 Accounts Payable 🍓 Accounts Receivable	Default Guest Rate	Guest	
🗞 Employee	Default Stay Type:	Daily	
6 Guest Room	Guest Room Area:	Guest Rooms	
Point of Sale	Transfer Item:	Folio transfer	
- 🚯 Web Site 🍓 Clubessential		🗹 Enable split folio option in POS	
🍇 ClubSoft Links	Admin Notification Employee:	Bill Doyle	
🍪 CRM 🏟 Office Cloud	Email From Address:	support@clubessential.com	
🍇 Online Payment Portal		Override Reservation Start/End Time 12:00 AM	to 12:0
 Artner Products Artner Services 		Confirmation Reminder Change Cancel Che	eck Out
r 40 Jervices		Send: Prompt	
		Subject: ({%ConfirmationNumber%}) Scheduled Roo	om Reservation

• Ticket Templates - Hide Item Breakout

<u>Use Case</u>: A control to hide item breakout has been added to the Receipt Ticket Template element. This can be used for Areas of the club in which Members do not desire itemized receipts.

roperties		C	1	13
E 2↓ □	True	[Area]	[POS Table Name]	
HideItemBreakout	ruise	[Cover Count]	[Server]	
HideServiceCharge HideTotalsAndPayr			[Member]	
ServiceChargeLinel ShowDiscountSumr			[Repeater]	
ShowGratuityLine ShowItemPriceWhe			Receipt	-
ShowNonZeroGrati	False			

• Prepaid Invoices - Vendor Name on GJ Description

<u>Use Case</u>: Journal entries created by prepaid invoices will now always include the vendor name in the description.

• Mobile POS Sync Improvement

<u>Use Case</u>: Changes in case to Item and Item Modifier names will now flag a sync to Mobile POS.

Bug Fixes

- Mobile POS Fixed an issue where using "Group Like Items" was sometimes incorrectly marking items as sent.
- Mobile POS Fixed an issue where changing the Resource option in the Dining tab was not updating the reservation list.
- Mobile POS Fixed a bug where the Settle to Folio grid was displaying incorrect Guest Rooms Arrival/Departure dates.
- Mobile POS Fixed an issue where Tee Times from 12PM 12:59PM were incorrectly displaying as AM on the Tee Sheet.
- CMA Fixed an issue where the A/R Reconciliation Report was not properly factoring in CE Payments refunds.
- CMA Fixed a bug where selecting Save and New from the Edit Mobile Menu grid would throw an error and duplicate days of the week.
- CMA Fixed an issue that prevented users from deleting existing Mobile Ordering Menus.
- CMA Fixed an issue where the "Show Summary Breakout on Statement" Area setting was not respected for Mobile POS transactions.