CLUB CADDIE

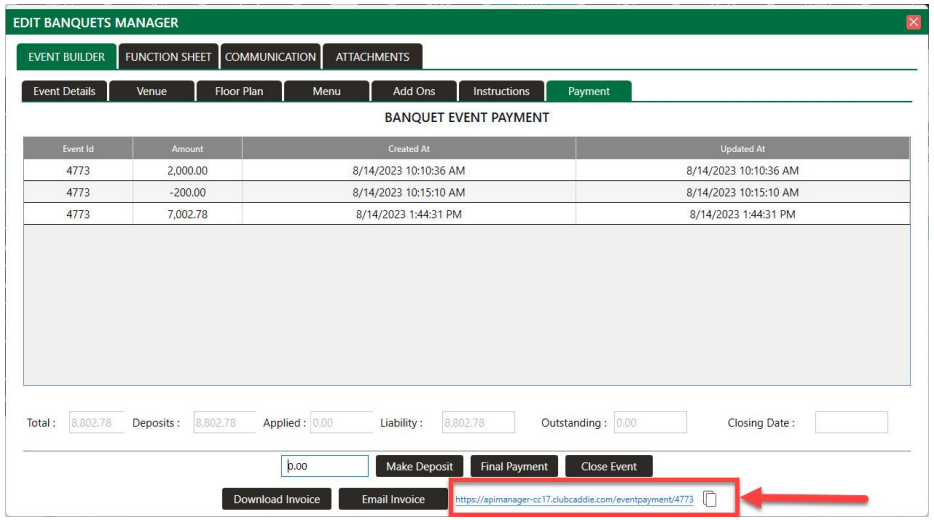
a Jonas Software Company

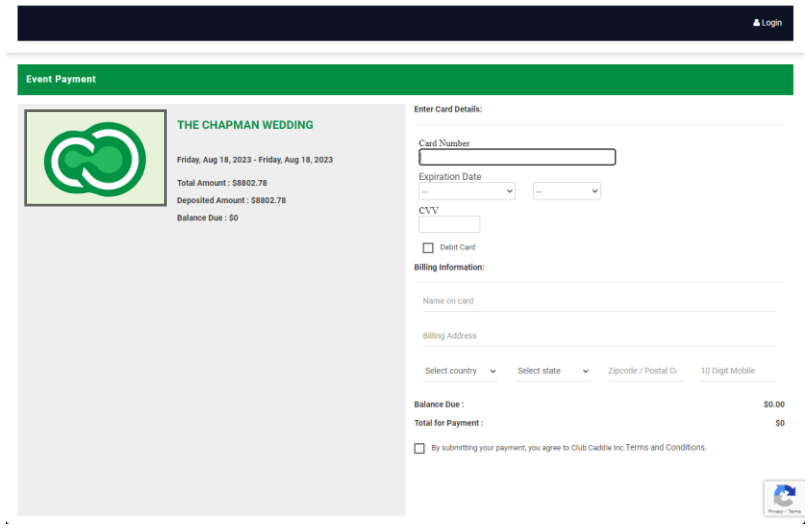
New Release/Enhancements

5.4.7

EVENT DEPOSIT ONLINE PAYMENT

From the Event Builder --> Payment tab, there is now a unique Online Payment Link for every Banquet, Golf Outing and Activity Outing. This link is unique for each Event and allows Customers to make Deposits and Final Payments online.





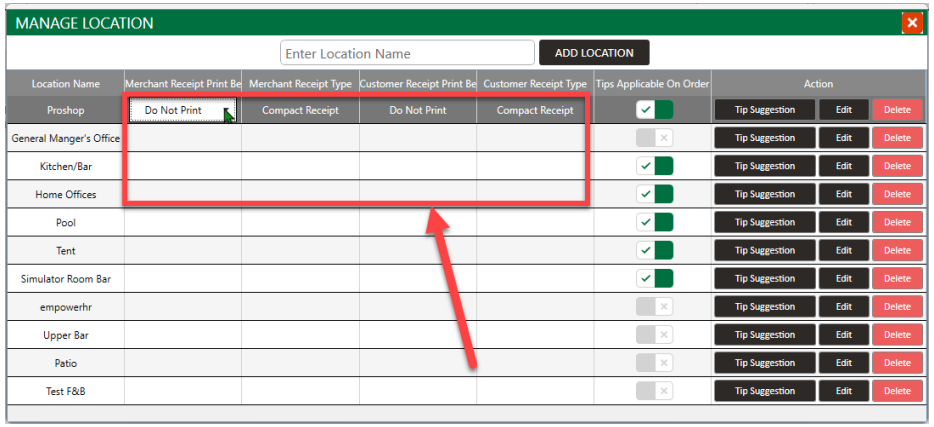
RECEIPT PRINTING OPTIONS

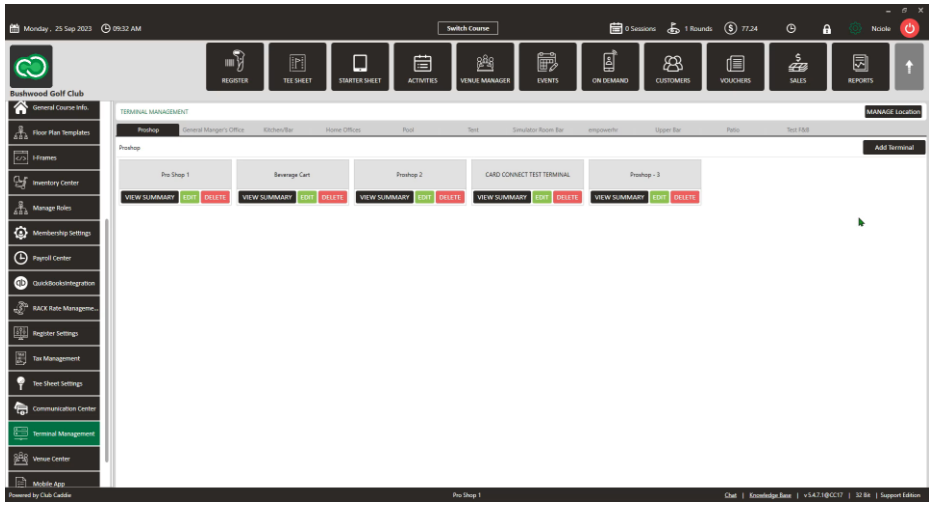
New settings in Terminal Management for more control the printing of customer and merchant receipt copies separately, saving on paper and printing costs for everything except credit/debit transactions.

From Settings --> Terminal Management --> Manage Location, there are now four new options for Receipt Printing:

- Merchant Receipt Print Behavior - Options for "Print" and "Do Not Print"
- Merchant Receipt Type - Options for "Full Receipt" and "Compact Receipt" - The "Compact Receipt" will not be itemized and will only show the Grand Total
- Customer Receipt Print Behavior - Options for "Print" and "Do Not Print"
- Customer Receipt Type - Options for "Full Receipt" and "Compact Receipt" - The "Compact Receipt" will not be itemized and will only show the Grand Total

NOTE: *The options for "Print" and "Do not Print" will be for all Payment Methods except Credit/Debit Cards. We are working on improving the overall workflow for Credit/Debit Transactions. This functionality will be released in the October release of Club Caddie*





Video Example

Improved Clover Payment Processing Speed

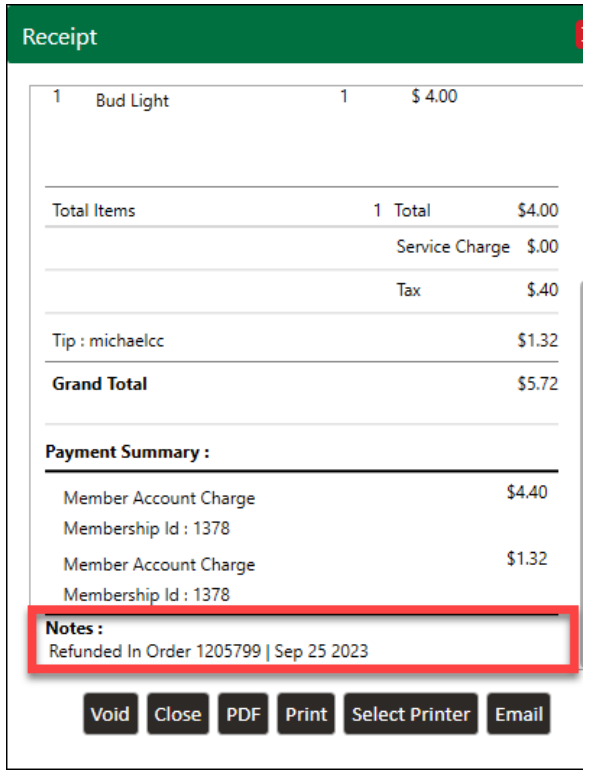
Removed the "Welcome Screen" from the payment processing workflow, which will reduce the amount of time to process Clover Transactions by a second every time a Card Present Transaction is processed

REFUND ORDER ID TEXT

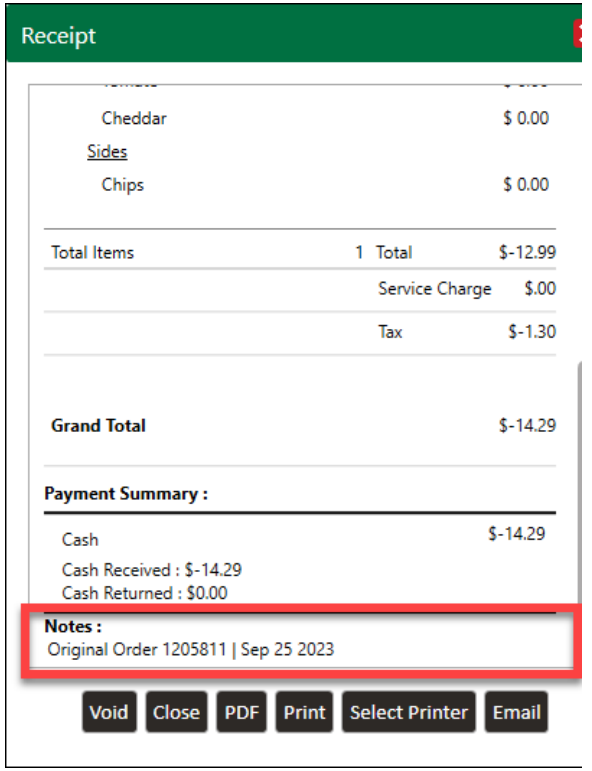
Whenever a Transaction is Refunded in Club Caddie, there will now be text in the Notes section of the Receipt. On the Original Transaction Receipt, it will show the OrderID and Date of the Refund. The Refund Receipt will show the OrderID and Date of the original Transaction.

Sales> Action > Refund > Can go back to the original receipt and see the refund in the notes section.

Original receipt with a note of refund date.

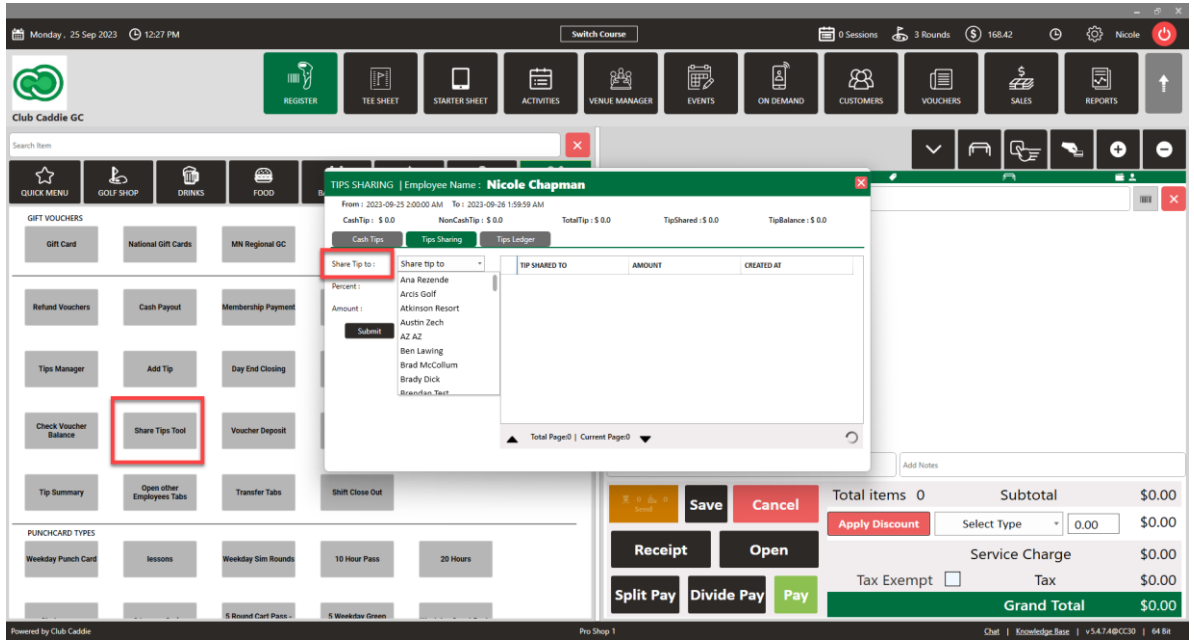


Refund receipt with a note of the original transaction date.



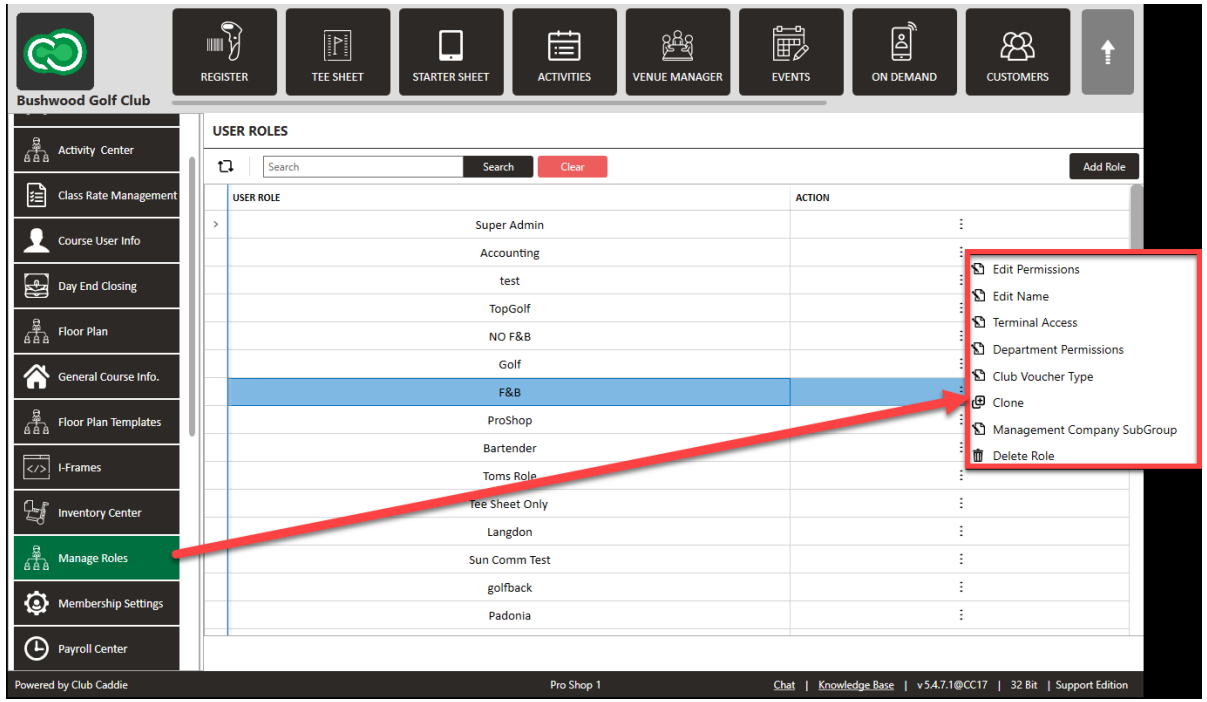
TIPS SHARING

Now only shows Active Users, and the User list is now alphabetized



CENTRALIZED ROLE ACTIONS

Adds a dropdown menu in the "Manage Roles" section, centralizing action buttons like "Edit," "Delete," or "Assign" for a more streamlined interface.

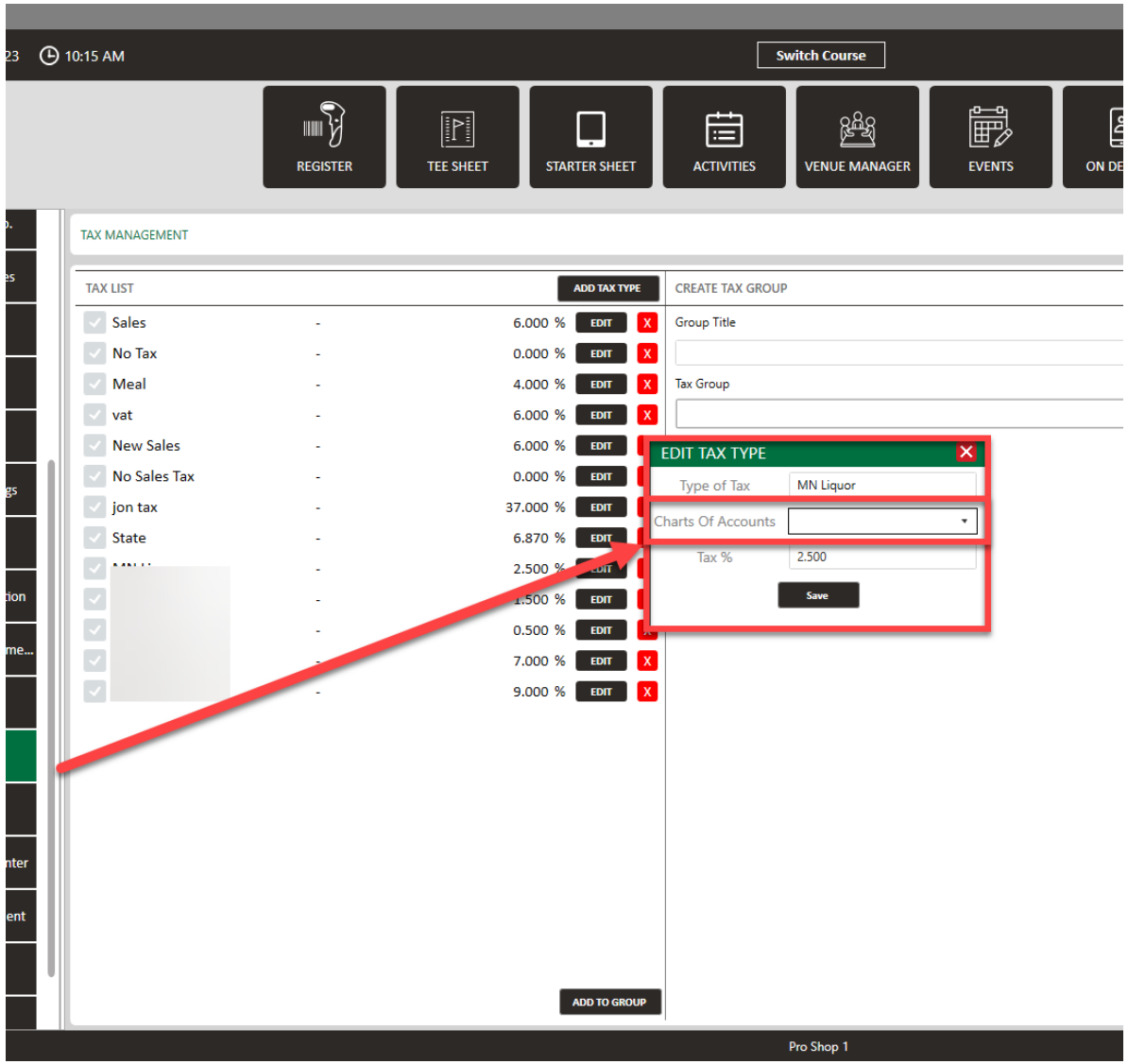


STEPS: Settings> Manage Roles> Action

TAX TYPE ACCOUNT SELECTION

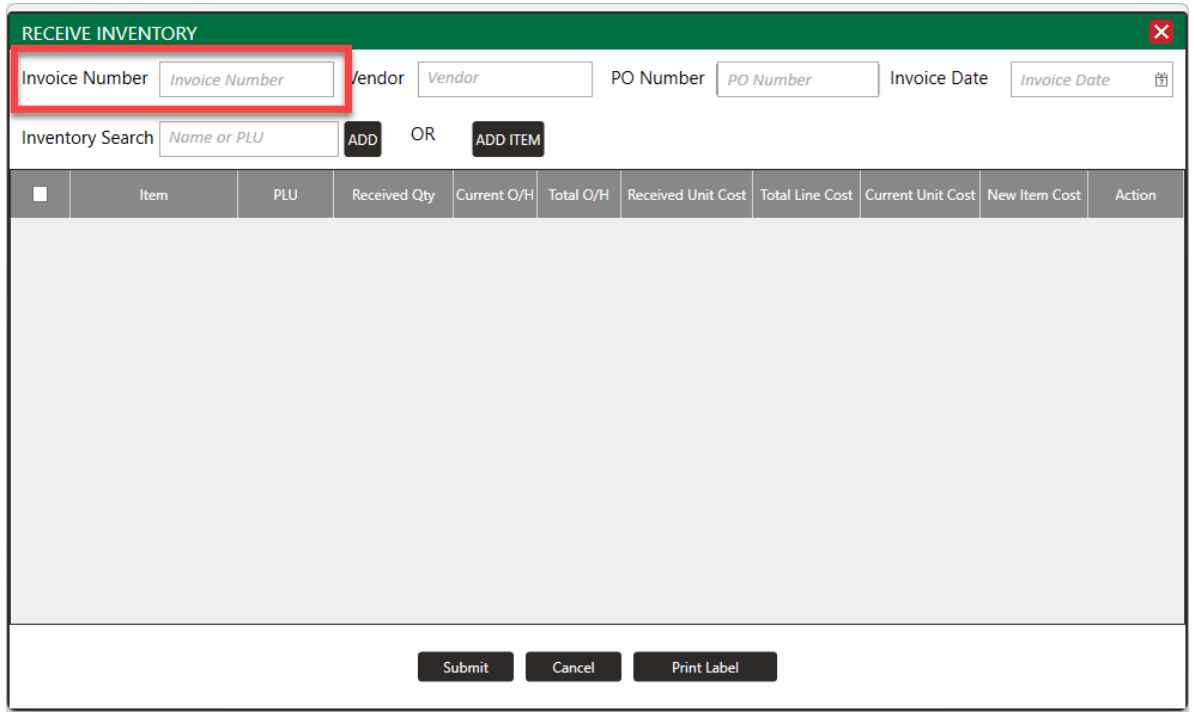
Allows for mapping different tax types to specific Chart of Accounts for better financial reporting.

Settings> Tax Management > Edit>
Select drop down of **Chart Of Accounts**



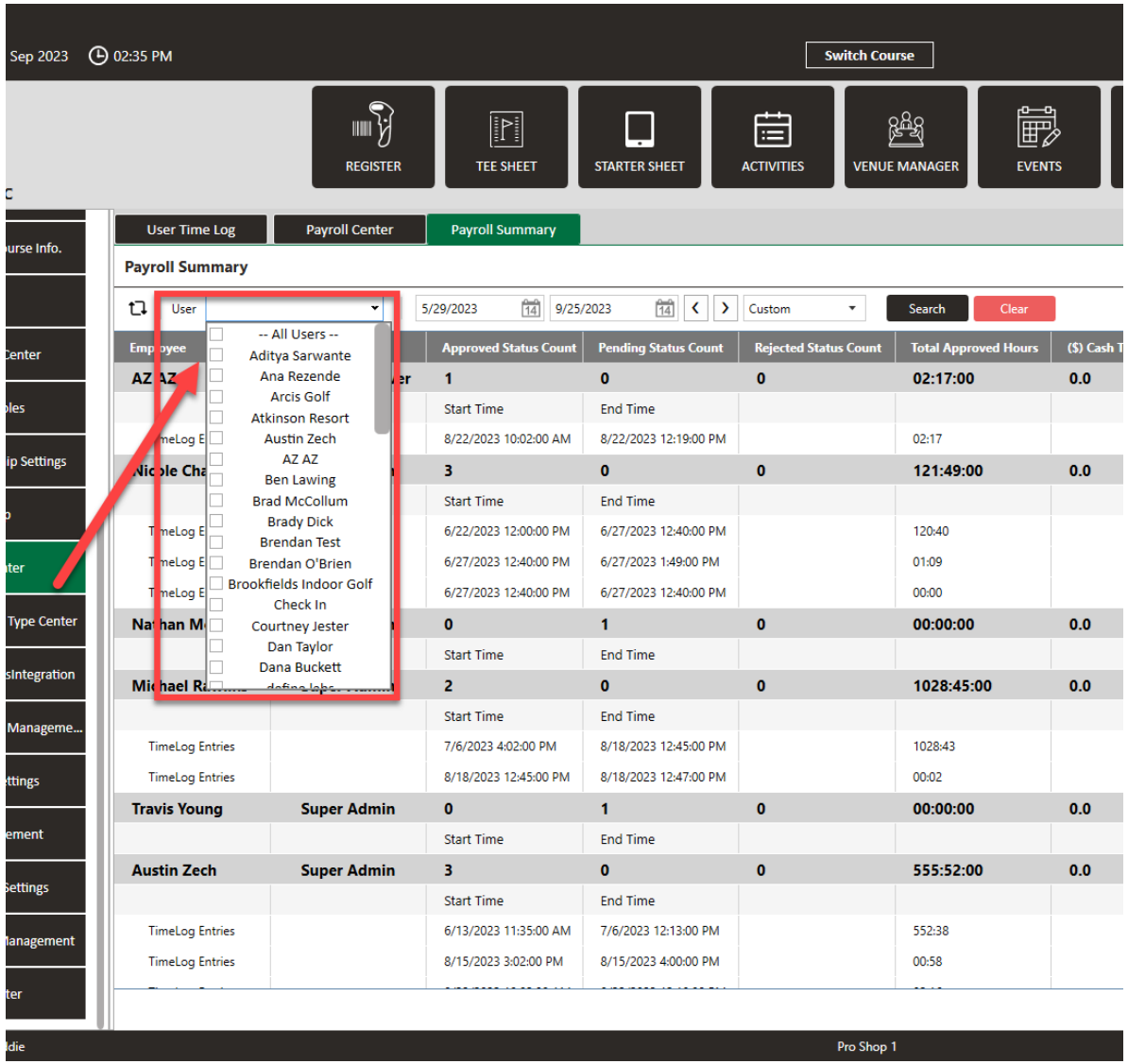
RECEIVE INVENTORY

Enables manual editing of invoice numbers during inventory receiving to ensure alignment with external documentation.



PAYROLL CENTER

Now only shows Active Users in alphabetical order



Internal Only

1. Manual Payment Authorization: Enables backend manual confirmation for transactions that have successfully passed through the payment gateway but have not been updated in Club Caddie. So if a Transaction is marked as “Pending” in Club Caddie, but it actually went through on the Payment Gateway, there will be an option in the Sales Module (in the Support Edition of Club Caddie) to “Mark this Transaction as Success”
2. Origin Club Tracking: Adds a dedicated field to capture the originating club of each member for internal analytics and cross-promotion opportunities.
3. Customizable Receipts: Introduces two versions (V1 & V2) of receipt customization, allowing for more control over layout and information display. (V2 is for internal use only)
    1. In V1 can control Customer and Merchant copies. Can also specify on the Terminal level if you want to Print the full, itemized Receipt or a “compact” Receipt, which will not be itemized and will only show the Subtotal, Tax, Tip, Grand Total
4. Alphabetical Report & Settings: Automatically arranges all internal reports and settings in alphabetical order for easier navigation and access.