



**CLUB  
CADDIE**

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a **JOTAS** Software Company

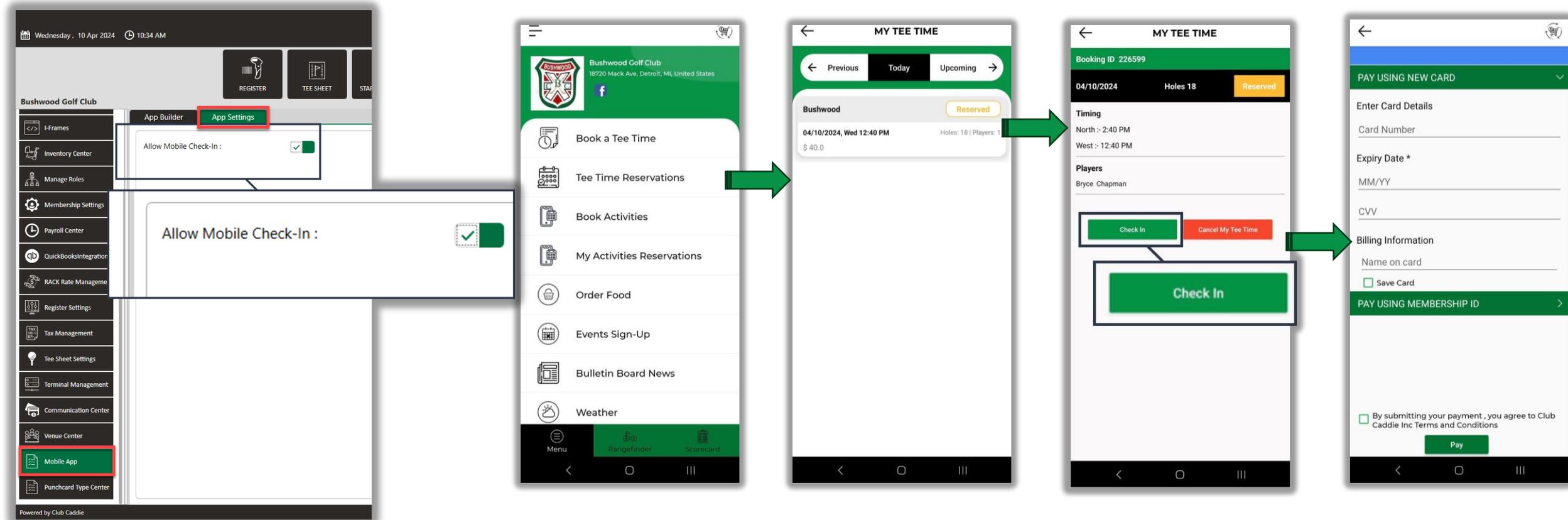
New Release/Enhancements

**5.4.15**

## SELF CHECK-IN FROM MOBILE APP AVAILABILITY TOGGLE

**Navigate to:** Settings > Mobile App > App Settings > Allow Mobile Check-in > Toggle On/Off

**Function:** Members and customers now have the option to self-check out. This will take them to the payment screen, where they can either enter their credit card information or charge the purchase to their existing membership account, if you would like to allow that option.



# GUEST NAME DISPLAY

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The screenshot shows a table with three rows representing tee times. The first row is for 8:20 PM and contains an 'Add' button. The second row is for 8:30 PM and contains three entries. The first entry is 'Rawlins Michael, 1 Golfers' with a green background, a white square icon, a dollar sign icon, a person icon, and the text 'Online'. The second and third entries are 'Guest of Rawlins Michael, Golfers' with a green background, a white square icon, a dollar sign icon, and the text 'Online'. The text 'Guest of Rawlins Michael,' in both the second and third entries is highlighted with a red rectangular box. The third row is for 8:40 PM and contains an 'Add' button.

8:20 PM	Add				
8:30 PM	Add	Rawlins Michael, 1 Golfers   Online	Guest of Rawlins Michael, Golfers  Online	Guest of Rawlins Michael, Golfers  Online	
8:40 PM	Add				

**Function:** From the Tee Sheet, the guests of the person that made the tee time will now display as “Guest of (Player Name)” rather than the rate they were booked for in previous versions and having to reference notes for guest information.

# PUNCH CARD IDENTIFICATION

**Navigate to:** Settings > Punchcard Type Center > Punchcard Type Rate. Now, when you search for your rate to associate with your punch card, you will have much more information about the rate for selection.

**Function:** Enhancements in rate management for punch card types have been introduced, including improved visibility in dropdown selections for easier management.

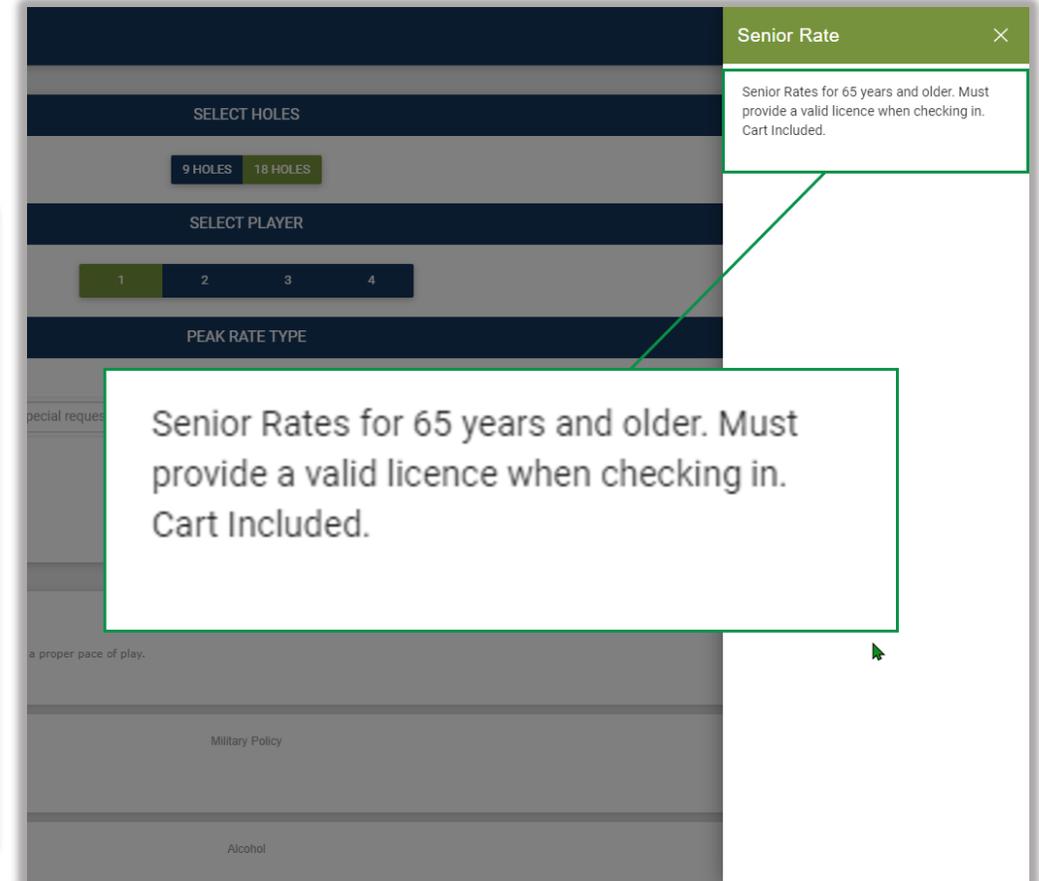
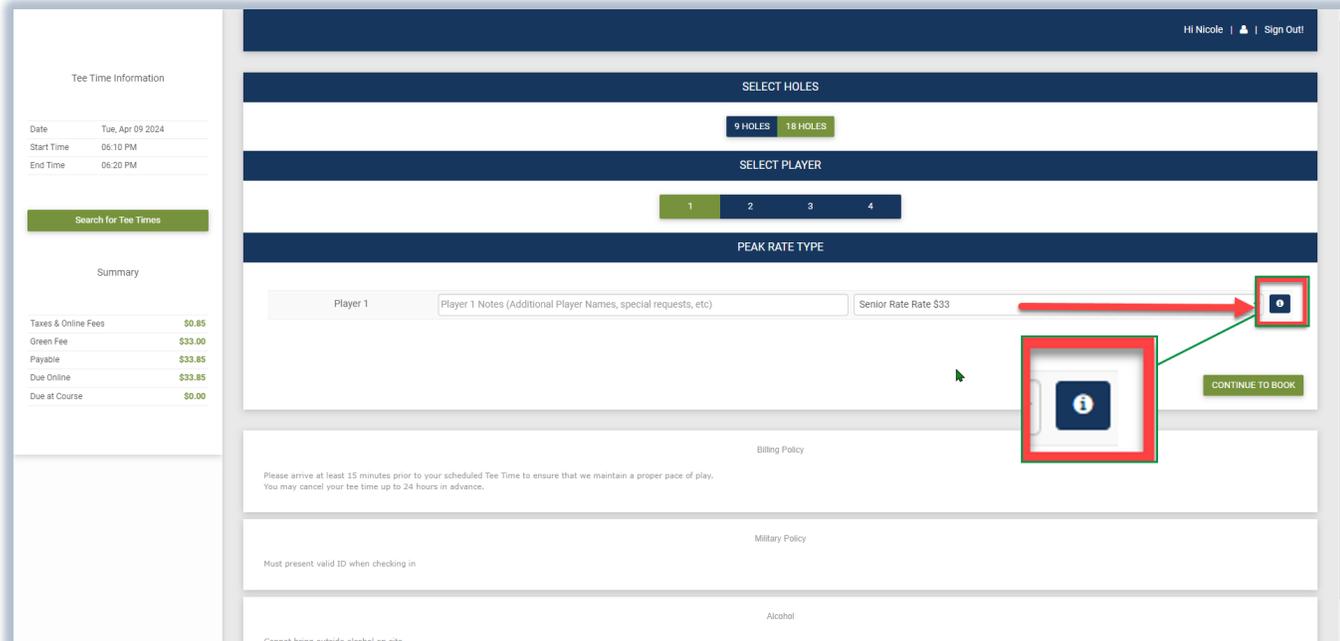
The screenshot displays the 'ADD EDIT PUNCHCARD TYPE' interface. At the top, there are three tabs: 'PUNCHCARD TYPE', 'PUNCHCARD TYPE RATE' (which is active), and 'USAGE STRATEGY'. Below the tabs is a table with columns: ID, Activity Resource Type, RackRate, ClassRate, Rate (\$), Quantity, and Action. The table contains one row with ID '82' and '1 bag range balls' in the RackRate column. A dropdown menu is open over the '1 bag range balls' cell, showing a list of rate options. A green box highlights the dropdown menu, and a larger green box highlights a zoomed-in view of the dropdown options. The zoomed-in view shows the following items:

- 1 bag range balls  
12/19/2024 - 12/31/2024 | 06:00:00 - 19:00:00 | M, Tu, W, Th, F, Sa, Su
- 1 Hour Simulator | 60 Minutes  
01/01/2024 - 12/31/2024 | 16:00:00 - 21:00:00 | M, Tu, W, Th, F, Sa, Su
- 1 Hour - Jake Gregus  
08/01/2024 - 08/31/2024 | 09:00:00 - 17:00:00 | M, Tu, W, Th, F
- 1 Hour - Racketball  
08/03/2024 - 08/07/2024 | 06:00:00 - 19:00:00 | M, Tu, W, Th, F, Sa, Su
- 1 Hour - Room Rental

# RACK RATE MANAGEMENT DESCRIPTION

**Function:** The ability to create descriptions for rates that will be published to the online booking engine. The description will display with an info icon upon the customer selecting the applicable rate online with a description associated.

**Navigate to:** Settings > RACK Rate Management > Find your rate OR create a new rate > Enter Description



## 3P Integrations

# INTEGRATION WITH PLAYERS FIRST

**Function:** A new integration allows for management within the Players First Platform. *Players First is a customer experience management solution.*

The screenshot shows the Club Caddie software interface for Bushwood Golf Club. The top navigation bar includes a 'Switch Course' button and various system metrics. A secondary navigation bar lists various integrations, with 'Players First' highlighted in green. The left sidebar contains a list of management tools, with '3P Integrations' selected. The main content area displays 'Player's First Account Information' with a table of data points. A green box highlights the 'Players First' header, and a red box highlights a vertical toolbar on the right side of the table.

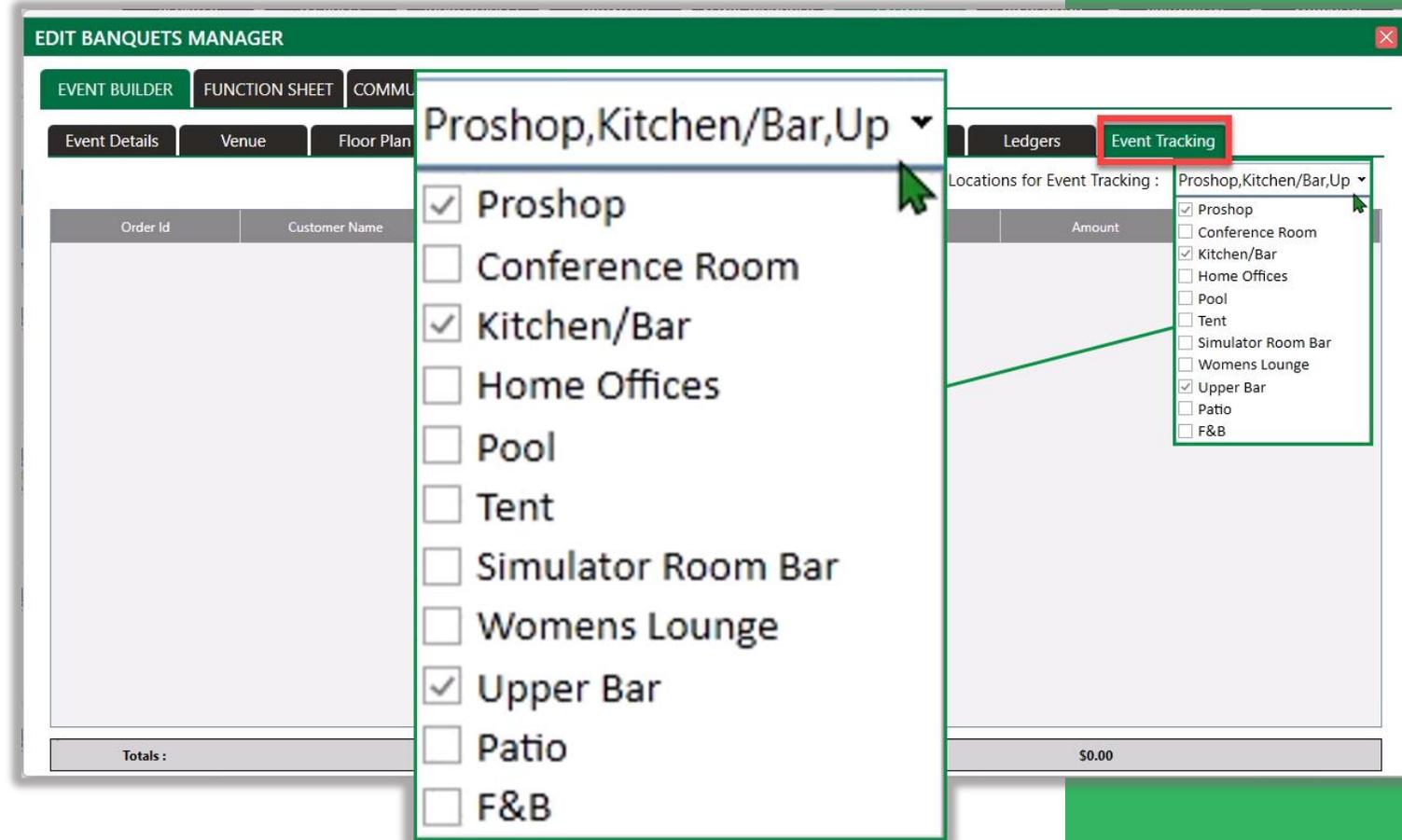
Data Point	
Club Caddie Environment	cc17
Club Caddie Clubhouse ID	22985
Bushwood GC - Main 18	38504
DELTA 9	103416

**Navigate to:** Settings > 3P Integrations > Last tab on the right > Players First. From there, you can copy the information into your Players First account.

# EVENT TRACKING

**Function:** Ability to tie Sales that are processed with any Tender Type to an individual Event. This enables Operators to see how much Revenue was generated from a given Event, including Sales that are not incorporated into the Event Builder.

**NOTE:** This is an optional Setting that can be enabled on the individual Event level. Can also specify the Terminals that “Event Tracking” pertains to. When a Transaction is being tendered out, there is an option to select an event to tie that transaction to. Only events that are taking place on that day will be selectable for Event “Tracking”



# EVENT TRACKING

**Function:** A new report allows for the tracking of events by terminal, providing insights into sales generated from events outside the event.

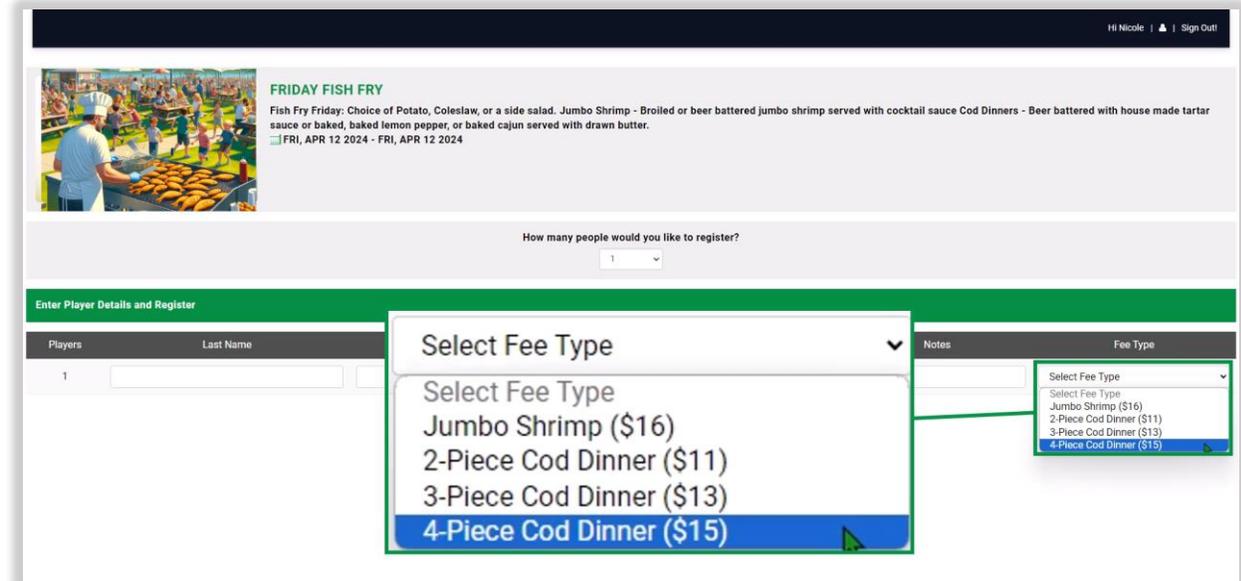
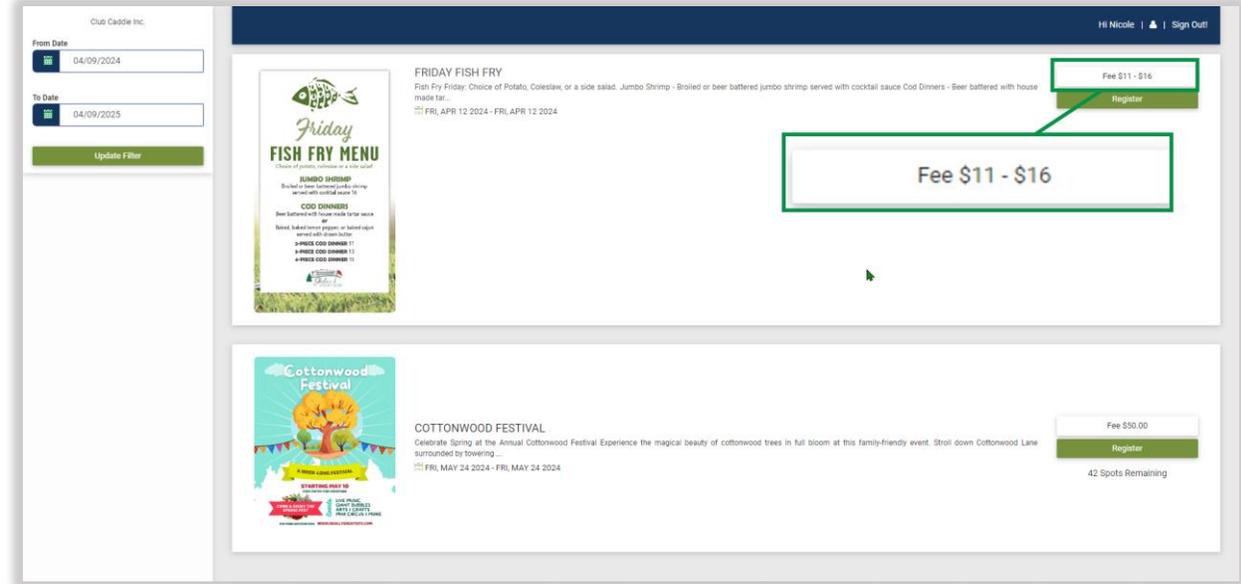
The screenshot displays the Club Caddie software interface for Bushwood Golf Club. The top navigation bar includes a 'Switch Course' button and various status indicators: 0 Sessions, 2 Rounds, \$ 184.01, and the user name Nicole. A secondary navigation bar contains icons for REGISTER, TEE SHEET, STARTER SHEET, ACTIVITIES, VENUE MANAGER, EVENTS, ON DEMAND, CUSTOMERS, VOUCHERS, SALES, and REPORTS. The left sidebar lists various reports, with 'Event Tracking Report' highlighted in green. The main content area shows the 'EVENT TRACKING' report for a 'Banquet' event named 'Spring Party'. The report includes a search bar with dates 4/5/2024 and 4/5/2024, and a table with the following data:

Event Type	Name of Event	Orderid	Customer Name	Terminal Location Name	Date	Payment Type	Amount
Banquet	Spring Party	633192		Proshop	4/5/2024 12:53:36 PM	cash	2.65
<b>Total Amount</b>							<b>2.65</b>

At the bottom of the interface, there is a footer with 'Powered by Club Caddie', 'Pro Shop 1', and system information: 'Chat | Knowledge Base | v5.4.15.4@CC17 | 64 Bit'.

# ONLINE EVENT ENHANCEMENTS

**Function:** When multiple fee types are used, a price range will now be displayed. Additionally, fee type names will now be displayed from a dropdown upon registration.



## Events

# EVENT PAYMENT ENHANCEMENTS

**Function:** A new payment link option has been added for event payments. This additional link will not display any outstanding balance details.

For the Payment Link without the Event Balance details, Customers will now be able to make a Deposit against the Event even if there is nothing built out in the Event Menu/Add Ons/Golfers tabs of the Event Builder.

The screenshot shows the 'Event Payment' interface for 'EVENT TRACKING TEST OUTING' (Tuesday, Apr 09, 2024 - Tuesday, Apr 09, 2024). It includes a 'Make Deposit' field set to 0.00 and a 'Payment Link Without Balance Details' button. The right side of the page contains a payment form with the following sections:

- Enter Card Details:** Fields for Card Number, Expiration Date, and CVV. Includes a checkbox for 'Debit Card'.
- Billing Information:** Fields for Name on card, Billing Address, Select country, Select state, Zipcode / Postal Code, and 10 Digit Mobile.
- Total for Payment:** Displayed as \$0.00.
- Checkboxes for 'Tokenize and save my card for future use' and 'By submitting your payment, you agree to Club Caddie Inc. Terms and Conditions'.
- A green 'Complete Payment' button.

The screenshot shows the 'EDIT BANQUETS MANAGER' interface with tabs for EVENT BUILDER, FUNCTION SHEET, COMMUNICATION, and ATTACHMENTS. The 'Payment' tab is active, displaying a table of 'BANQUET EVENT PAYMENT'.

Event Id	Amount	Created At	Updated At
4872	1,000.00	11/3/2023 11:36:24 AM	11/3/2023 11:36:24 AM
4872	3,285.50	11/3/2023 11:38:35 AM	11/3/2023 11:38:35 AM
4872	3,285.50	11/3/2023 11:43:34 AM	11/14/2023 12:52:16 PM

Below the table, a green box highlights the 'Payment Link Without Balance Details' button. At the bottom, a summary bar shows: Total: 4,285.50, Deposits: 7,571.00, Applied: 4,285.50, Liability: 3,285.50, Outstanding: -3,285.50, Closing Date: 03 Nov 2023. A 'Make Deposit' button is set to 0.00. At the bottom, there are buttons for 'Download Invoice', 'Email Invoice', and two 'Payment Link Without Balance Details' buttons with their respective URLs.

## Membership

# POS MEMBERSHIP SALE - PRORATION

**Function:** Membership Classes will now be Prorated when they are assigned to a Member through the POS. The “Prorate on Sale” toggle does need to be enabled for the Proration to take effect.

**Navigate to:** Settings → Class Management → a new field for “Prorate on Sale”

The screenshot displays the Club Caddie POS system interface for Bushwood Golf Club. The top navigation bar includes a date and time display (Thursday, 11 Apr 2024, 01:19 PM), a 'Switch Course' button, and various status indicators (0 Sessions, 4 Rounds, \$ 331.63). Below this is a menu of icons for REGISTER, TEE SHEET, STARTER SHEET, ACTIVITIES, VENUE MANAGER, EVENTS, ON DEMAND, CUSTOMERS, VOUCHERS, SALES, and REPORTS. The main content area is titled 'Class Management' and contains a table of class details. A green box highlights the 'Prorate On Sale' column header, and a red box highlights the 'Prorate On Sale' toggle for the 'Junior Family (21-34)' class.

ID	Class Name	Description	Is Member	Due Type	Due Amount (\$)	Tax Group	Processing Fee	Enable Online Sale	Prorate On Sale	Eligible for Awards Person	Club Display	Maximum Awards	Show in Dist E	Action
347	Family Monthly		Yes	Monthly	\$100.00	State	\$5.00	Yes	Yes	No	0	No	No	Action
212	Ford Motor Company	Employees	No							No	0	No	No	Action
289	Full	Full Golf Family	Yes	Monthly	\$500.00	Sales	\$0.00	Yes	Yes	No	0	No	No	Action
10383	Full Access Family 40+		Yes	Annually	\$3,150.00	Duluth	\$0.00	Yes	Yes	No	0	No	No	Action
247	Full Family (46-64)	Full Golf	Yes	Annually	\$4,900.00	Test	\$0.00	Yes	No	No	0	No	No	Action
320	GF - Monthly Full member	Full Member	Yes	Monthly	\$200.00	Sales	\$0.00	Yes	No	No	0	No	No	Action
338	Gold Member		Yes	Monthly	\$50.00	Sales	3.99%	No	No	No	0	No	No	Action
335	Golf + Cart Plan	Self + Golf Cart In	Yes	Annually	\$5,000.00	Sales	0.00%	Yes	No	No	0	No	No	Action
10535	Golf Member Ride	Test	Yes	Annually	\$0.00	No Sales Tax	\$0.00	No	No	No	0	No	No	Action
291	Guest	Guest	No						No	No	0	No	No	Action
137	Hole In One Club		Yes	Annually	\$40.00	Test	0.00%	Yes	No	No	0	No	No	Action
211	Holiday Inn	Hotel	No						No	No	0	No	No	Action
292	Initiation Fee \$1,000		Yes	Annually	\$1,000.00	Test	\$0.00	Yes	No	No	0	No	No	Action
249	Intermediate Family (35-39)	Intermediate Famil	Yes	Annually	\$4,400.00	Test	\$0.00	Yes	No	No	0	No	No	Action
20	Junior	Under 17 years of a	No						No	No	0	No	No	Action
250	Junior Family (21-34)	Junior Family	Yes	Annually	\$3,850.00	Test	\$0.00	Yes	No	No	0	No	No	Action

## Membership

# MEMBERSHIP PAYMENT IN THE REGISTER

**Function:** Will now populate with the member's full balance amount owned and can be viewed and can pay their full or partial balances. No longer have to navigate to the ledger to obtain that amount.

The screenshot shows the Register software interface for Bushwood Golf Club. The top navigation bar includes the date (Tuesday, 09 Apr 2024), time (09:55 AM), and user information (Nicole). The main menu features icons for REGISTER, TEE SHEET, STARTER SHEET, ACTIVITIES, VENUE MANAGER, EVENTS, ON DEMAND, CUSTOMERS, and VOUCHERS. A search bar is present above a row of category icons (QUICK M, FOOD/D, GOLF, PRO-SHC, DRINKS, FOOD, BANQUE, MERCHA, GOLF FE, TEST, GREEN F, TOOLS). The central area displays a 'PAYMENT' window for a member with ID 2213, Quinn Chapman. A table lists member details, and a callout box highlights the 'Member Balance : 33.22'. The bottom right shows a payment summary with a 'Grand Total' of \$33.22. The footer includes 'Powered by Club Caddie', 'Pro Shop 1', and version information.

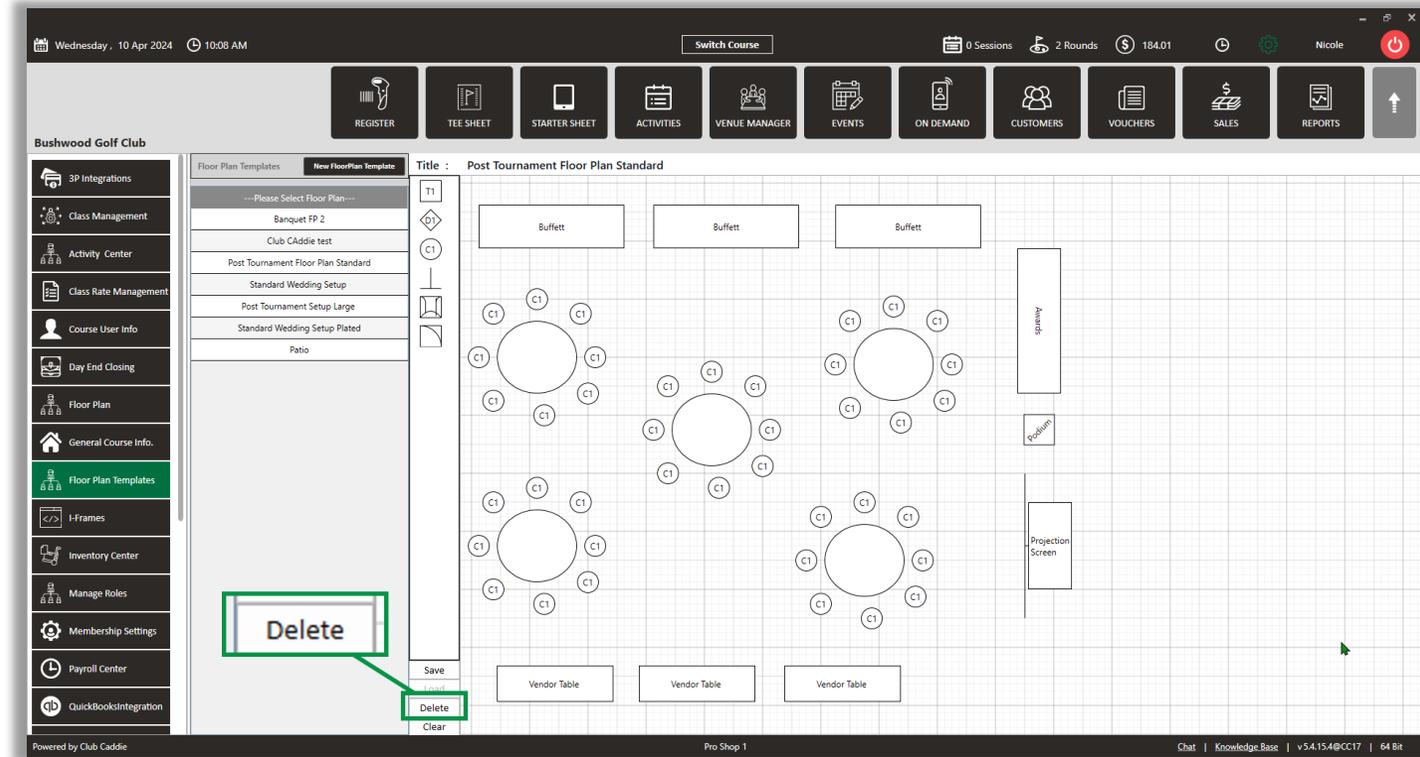
CustomerId	FirstName	LastName	EmailId	Contact No	MembershipId
216389	Quinn	Chapman	nicole.k.chapman5@g	1222170000	2213

Total items	0	Subtotal	\$33.22
Apply Discount	Select Type	0.00	\$0.00
Service Charge			\$0.00
Tax Exempt	N	Tax	\$0.00
<b>Grand Total</b>			<b>\$33.22</b>

## Food And Beverage/Register

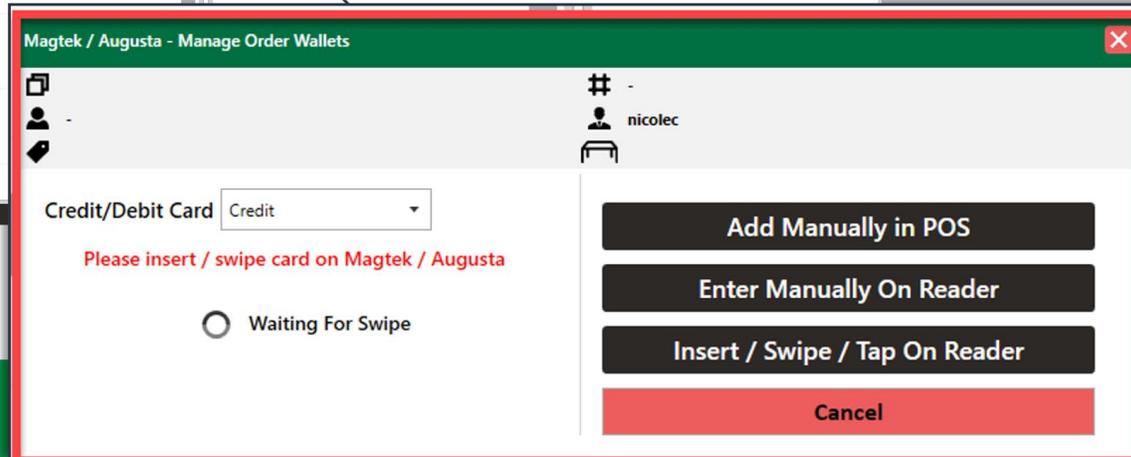
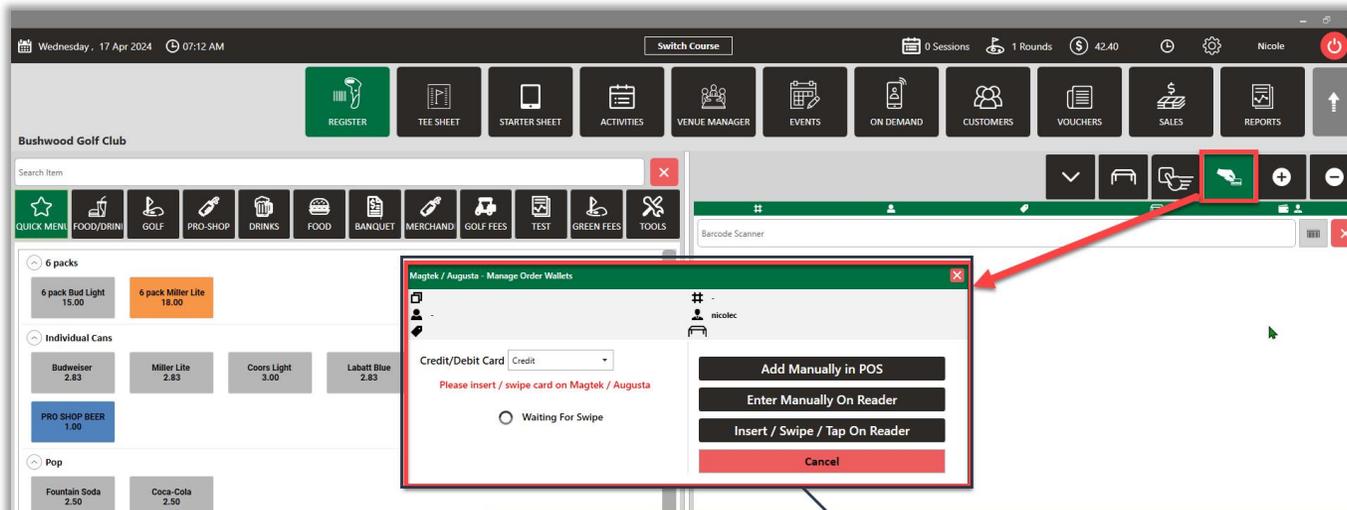
# FLOOR PLAN MANAGEMENT

**Function:** You can now delete floor plans.  
*Quick tip, you can use CTL+C and CTL+V to copy and paste within the floorplan templates for faster creation.*



# START A TAB BY SAVING A CREDIT CARD WITH NEW DEVICES

**Function:** You can now start a tab utilizing your Clover or Lane devices.



# REQUIRE THE NUMBER OF SEATS WHEN STARTING A TAB BY SELECTING A TABLE

**Function:** Once this settings is enable, when starting a tab by selecting a table, the system will require the user to enter the amount of seats to select that table. They will be prompted with an error notification if they fail to do so.

**Navigate to:** This is a terminal specific setting: Settings > Terminal Management > Find the terminal this will apply to > Click Edit > Toggle ON “Require Seat Count While Reserving Tables”

EDIT TERMINAL

Pro Shop 1

Show Notifications :

Requires Pin On Quick Tab :

Lock Screen :

Automatic Pinlock After Idle Seconds:

Automatic Logout After Idle Seconds:

Enable Signature-Tip On Screen:

Automatically Saved Register Tabs:

Reopen Tabs Behavior:

Requires Customer While Reserving Tables:

**Require Seat Count While Reserving Tables:**

SAVE

RECEIVE INVENTORY

Invoice Number 123456 Vendor Taylor Made PO Number *PO Number* Invoice Date 4/9/2024

Inventory Search *Name or PLU* ADD OR ADD ITEM

	Item	PLU	Received Qty	Current O/H	Total O/H	Received Unit Cost	Total Line Cost	Current Unit Cost	New Item Cost	Action
<input type="checkbox"/>	Taylormade Glove		6	3	9	8.00	\$48.00	\$5.50	\$7.17	✘
<input checked="" type="checkbox"/>	Taylormade Tp5 Sleeve		24	32	56	12.00	\$288.00	\$3.50	\$7.14	✘

Submit Cancel Print Label

**Total Amount : \$336.00**