



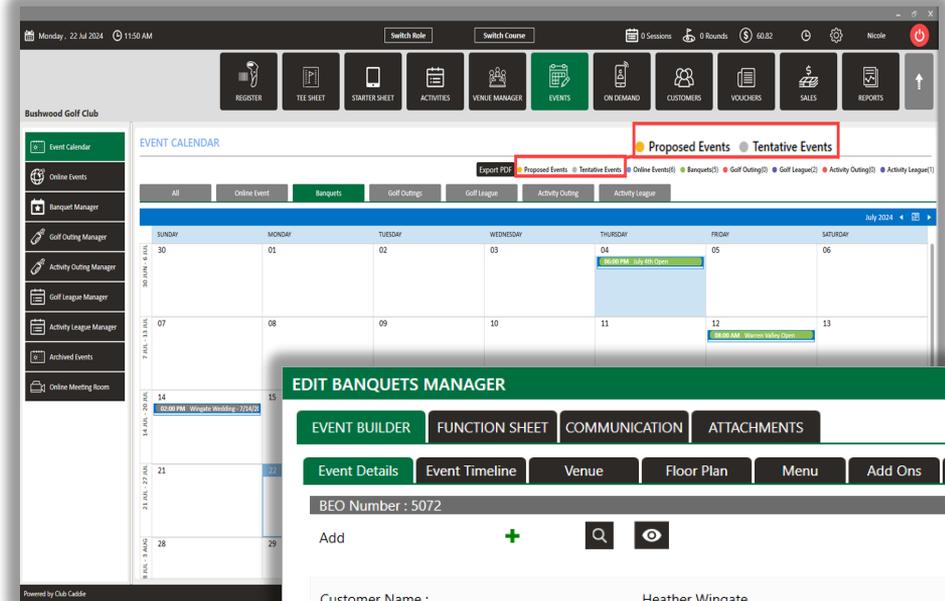
New Release/Enhancements

5.4.18

EVENT STATUSES

Navigation Steps: Event Details tab > Confirmation Status

Feature explanation: - New **Confirmation Status** options: 'Proposed', 'Tentative', and 'Confirmed'. Each status will reflect a different color on the Event Calendar for easier identification.



EDIT BANQUETS MANAGER

EVENT BUILDER | FUNCTION SHEET | COMMUNICATION | ATTACHMENTS

Event Details | Event Timeline | Venue | Floor Plan | Menu | Add Ons

BEO Number : 5072

Add

Customer Name : Heather Wingate

Address :

Phone : 3034084602

Email : heatherwingate@outlook.com

* Name of Event : Wingate Wedding - 7/14/2024

Confirmation Status : Tentative

* Event Date : 7/14/2024 7/14/2024

Preliminary Guest Count : 120

Service Fee % : 20.00

EVENT TIMES ON EVENT CALENDAR

Navigation Steps: Event Timeline Tab >Event Time

EDIT BANQUETS MANAGER

EVENT BUILDER | FUNCTION SHEET | COMMUNICATION | ATTACHMENTS

Event Details | Event Timeline | Venue | Floor Plan | Menu | Add Outs | Instructions | Payment | Event Notes | Ledgers | Event Tracking

BEO Number: 5072 | Booking Date: 7 Jul 14, 2024

Add Customer: +

Customer Name: Grant Wingate | Customer Name: Mackenzie Leuzier

Address: | Address: |

Phone: 303404601 | Phone: 5554563450

Email: grantwingate@outlook.com | Email: jodi@example.com

* Name of Event: Wingate Wedding - 7/14/2024 | Type Of Event: Wedding

Confirmation Status: Tentative | Venue: Clubhouse

* Event Date: 7/14/2024 | * Event Time: 2:00 PM | 11:00 PM

Preliminary Guest Count: 120 | Final Guest Count: | Verified

Service Fee %: 20.00 | Tax Exempt:

* Event Time: 2:00 PM

Save Cancel



Feature Explanation: The Start Time of every Event now shows on the Event Calendar.

Event Calendar

- Online Events
- Banquet Manager
- Golf Outing Manager
- Activity Outing Manager
- Golf League Manager
- Activity League Manager
- Archived Events
- Online Meeting Room

EVENT CALENDAR

All | Online Event | Banquets

	SUNDAY	MONDAY
30 JUN - 6 JUL	30	01
7 JUL - 13 JUL	07	08
14 JUL - 20 JUL	14 09:00 AM Club Caddie Tournament 02:00 PM Wingate Wedding - 7/14/24	15

INSTRUCTIONS FOR TIMELINE ITEMS

EDIT BANQUETS MANAGER

EVENT BUILDER | FUNCTION SHEET | COMMUNICATION | ATTACHMENTS

Event Details | **Event Timeline** | Venue | Floor Plan | Menu | Add Ons | Instructions | Payment | Event Notes | Ledgers | Event Tracking

Title	Start Date	Start Time	End Date	End Time	Description	EDIT	DELETE	INSTRUCTION
Bridal Party Access to Bridal Room	07/14/2024	10:00	07/14/2024	15:00	Access to Clubhouse			
Ceremony Set Up	07/14/2024	13:00	07/14/2024	15:00	See Instructions			
Cocktail Reception Set up	07/14/2024	14:00	07/14/2024	16:00	See Instructions			
Reception (Cocktail Hour)	07/14/2024	15:00	07/14/2024	17:00	ests are allowed to sit 30 minutes before			
Ceremony	07/14/2024	16:00	07/14/2024	17:00	ests are allowed to sit 30 minutes before			
Cocktail Hour	07/14/2024	17:00	07/14/2024	18:00	See Instructions			

ADD / EDIT EVENT TIMELINE INSTRUCTIONS

Select Department: **Ceremony Set Up**

DELETE INSTRUCTION

Departments

- Complimentary Rounds
- Registration Set Up
- Tournament Format/Tees

of Chairs - 120
 # of Rows - 6 Rows on each side of the runner with 10 chairs each
 Runner - provided by the bride and groom - no rice - flower pedals are ok
 Arch - Provided by the Club - Decorations will be provided by Bride and Groom
 Flowers - Provided by Susan Flowers - 303-458-4567
 Ice Tea and Water Station will be set up in the back and available 1 hour prior to the ceremony start time
 - White Linen - Two Crafts - enough clear water cups for 150

Navigation Steps: Timeline tab of the Event Builder > Instructions

Feature explanation: The new Timeline Item Instructions feature streamlines event planning by offering department-specific instructions in the Event Builder's Timeline tab that will reflect on the BEO. For instance, golf events will only show golf-related instructions, while banquet events display banquet-specific guidance. Users can create reusable instruction templates in Settings, allowing quick customization by adding numbers or details without starting from scratch. This approach simplifies BEO creation and ensures consistency. When instructions are added to a Timeline Item, the system displays the associated department, making it easy to track which departments' instructions have been included for each item. Additionally, instructions can be edited in the **Instruction** tab.

CLUB CADDIE Bushwood Golf Club

Monday, 22 Jul 2024 12:20 PM

Settings | **Event Settings** | Departments

DEPARTMENTS

ALL | Banquet | Golf Driving | Golf League | Activity Overlay | Activity Language

EDIT EVENT TYPE DEPARTMENT

TITLE	EVENT TYPE	Event Type	Banquet	INSTRUCTIONS	ACTION
Reception Set Up	Banquet	Reception Set Up	0	DEFAULT INSTRUCTIONS # of Rounds - Lawn Color - Special Linen - Centerpieces - Cake Cutting Table - Sweet Book Table - Gift Table - On Course Set Up - On Course Containers - Drive Station - Hole Sponsors - Registration Table - Club - Awards Table - Scoring Tables - # of Chairs # of Rows Runner - Arch - Flowers - Ice Tea and Water Station Format of Play: Best Ball Format of Play: Course Approval of clubs, courses.	
Course Set Up	Banquet	Default Instructions	0		
Registration Set Up	Banquet		0		
Waterfall	Banquet		0		
Ceremony Set Up	Banquet		0		

Creating Template Event Instructions: Settings > Event Settings > Departments > Add

SET UP AND TEAR DOWN BLOCKS FOR VENUES

Navigation Steps: Events > Event Builder > Venue Tab > Add Location and set Setup and Breakdown times > Venue Manager

Feature Explanation: Establish set-up and tear-down times for each venue. Times are automatically blocked off in the Venue Manager Module when a venue is added to an event.



EDIT BANQUETS MANAGER

EVENT BUILDER | FUNCTION SHEET | COMMUNICATION | ATTACHMENTS

Event Details | Event Timeline | Venue | Floor Plan | Menu | Add On's | Instructions | Payment | Event Notes | Ledgers | Event Tracking

Location	Venue	Start Date/Time	End Date/Time	SetUpMinutes	TearDownMinutes	Traveling Item	Note	Action
Clubhouse	Banquet Hall	7/14/2024 6:00:00 PM	7/14/2024 11:00:00 PM	240	60	Ceremony	See Instructions	Edit Delete
Clubhouse	Patio	7/14/2024 5:00:00 PM	7/14/2024 6:00:00 PM	120	60	Cocktail Reception Set up	See Instructions	Edit Delete
Waterfall	Ceremony	7/14/2024 4:00:00 PM	7/16/2024 6:00:00 PM	120	60	Ceremony Set Up	See Instructions	Edit Delete
Clubhouse	Brides Room	7/14/2024 10:00:00 AM	7/14/2024 10:00:00 PM	30	30	Access to Brides Room		Edit Delete
Clubhouse	Grooms Room	7/14/2024 10:00:00 AM	7/14/2024 2:00:00 PM	30	30	Access to the Grooms Room		Edit Delete

Wednesday, 24 Jul 2024 02:31 PM

Switch Role | Switch Group | 1 Seasons | 3 Rounds | 476.20 | Nicole

CLUB CADDIE

BUSKETER | TEE SHEET | STARTER SHEET | ACTIVITIES | VENUE MANAGER | EVENTS | ON DEMAND | CUSTOMERS | VOUCHERS | SALES | REPORTS

Bar | Updates Lounge | The Station | Lodging | Pool | Banquet Hall | Golf Course | Banquet Hall | Clubhouse | Waterfall

14 July 2024

14 SUNDAY

CLUBHOUSE | GROOMS ROOM | BRIDES ROOM | BANQUET HALL ROOM A | BANQUET HALL | INFO

10:00 AM | 11:00 AM | 12:00 PM | 1:00 PM | 2:00 PM | 3:00 PM | 4:00 PM | 5:00 PM

Event Name: Wingate Wedding - 7/14/2024 - Acc

Event Name: Wingate Wedding - 7/14/2024
 Venue: Clubhouse
 Venue Type: Clubhouse
 Venue: Grooms Room
 Note: Access to the Grooms Room

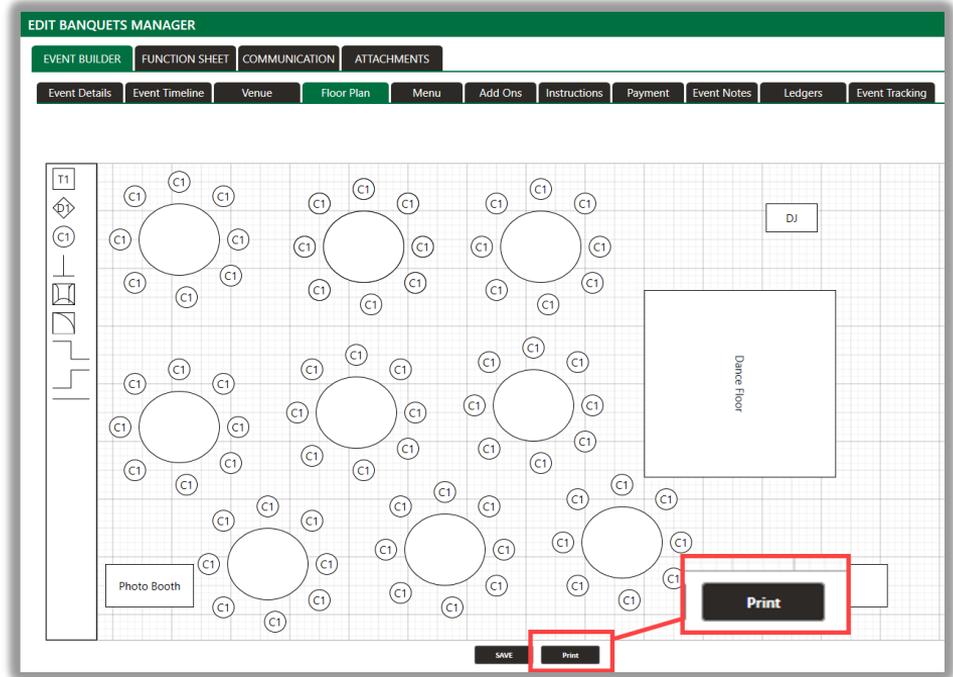
Powered by Club Caddie | Pro Shop 1 | One | Knowledge Base | USA 18130CC17 | 14 88

OPTION TO PRINT THE FLOOR PLAN

Navigation Steps: Event Builder > Floor Plan > Print

Feature explanation: Users can now print the floor plan directly from the Event Builder.

Examples: Floor plans can be added to BEOs, created as a PDF for custom sign off or attached in the attachments tab for easy organization or tracking of changes.



Events

DISPLAY ORDER FOR DEPARTMENT INSTRUCTIONS BY EVENT TYPE

EDIT BANQUETS MANAGER

EVENT BUILDER | FUNCTION SHEET | COMMUNICATION | ATTACHMENTS

Event Details | Event Timeline | Venue | Floor Plan | Menu | Add Ons | **Instructions** | Payment | Event Notes | Ledgers | Event Tracking

BANQUET EVENT INSTRUCTIONS

Select Department: Ceremony Set Up **MANAGE DEPARTMENTS**

DELETE INSTRUCTION

Departments	Instructions
Course Set Up	# of Chairs - 120 # of Rows - 12
ment - Individual Online Advance Paym	Runner - No runner - will use flowers Arch - Standard Arch - decorations provided by Bride and Groom
Registration Set Up	Flowers - ABC Flowers - 313-456-7894
Tournament Format/Tees	Ice Tea and Water Station
Tournament Scoring and Awards	
Tournament Services	
Ceremony Set Up	
Cocktail Reception Set Up	
Reception Set Up	
Cake Cutting	
Waterfall	
Cancellation Policy	
Complimentary Rounds	

Monday, 22 Jul 2024 12:55 PM

CLUB CADDIE

REGIS. TEL SHEET. STARTER SHEET. ACTIVITIES. VENUE MANAGER. EVENTS. ON DEMAND. CUSTOMERS. VOUCHERS. SALES. REPORTS.

DEPARTMENTS

TITLE	EVENT TYPE	DISPLAY SEQUENCE	DEFAULT INSTRUCTIONS	ACTION
Payment - Individual Online Advance Payment	Banquet	0	*Cameron Springs to provide link to host for player registration at Cameron Springs will tentatively hold space for full group size until the link closed 48 hours before the time of play	
Ceremony Set Up	Banquet	1	# of Chairs # of Rows Runner Arch Flowers Ice Tea and Water Station	
Cocktail Reception Set Up	Banquet	2	Move Arch Tea and Water Station from Ceremony # of High Top Tables Linen: # of Round: Linen: Chair:	
Reception Set Up	Banquet	3	# of Round: Linen: Special Linen - Centerpieces - Cake Cutting Table - Signed Book Table - Gift Table -	
Cake Cutting	Banquet	4	Send Top layer of cake and package for take home. Pass out cake to each setting.	
Cancellation Policy	Banquet	6	Display this notice along with sheet for if a full event cancellation is needed for some reason, please do	

Navigation Steps: Timeline tab of the Event Builder > Instructions

Feature Explanation: Users can now change the order in which the Departments for Instructions are displayed to better organize by event types. Also, you'll notice a green checkbox next to departments that are already in use. This checkbox provides quick visual confirmation of active departments with instructions. If you need to modify the instructions or text for these departments, you can do so on a larger screen rather than within the add-on tabs. This expanded view makes it easier to read and edit your content. If you want to remove a department entirely, use the delete button located at the top of the screen. This streamlined interface allows for more efficient management of department-specific instructions and information.

To Change Department Display Order : Settings > Event Settings > Departments > Action> Edit > Display Sequence

POST REVENUE OPTION

Navigation Steps: Event Builder > Payment Tab

Feature Explanation: A new **Post Revenue** option added to the existing 'Close Event' functionality. When selected, items in the **Menu** and **Add Ons** tabs will be posted as Revenue and reflected in Reports. After confirming charges, users can finalize by selecting **Close Event** to lock the event from being edited.

The screenshot displays the 'EDIT BANQUETS MANAGER' interface. At the top, there are tabs for 'EVENT BUILDER', 'FUNCTION SHEET', 'COMMUNICATION', and 'ATTACHMENTS'. Below these are sub-tabs for 'Event Details', 'Event Timeline', 'Venue', 'Floor Plan', 'Menu', 'Add Ons', 'Instructions', 'Payment', 'Event Notes', 'Ledgers', and 'Event Tracking'. The 'Payment' tab is active, showing a 'BANQUET EVENT PAYMENT' table with columns for 'Event Id', 'Amount', 'Created At', and 'Updated At'. The table is currently empty. At the bottom of the interface, there are several summary fields: 'Total: 12,638.68', 'Deposits: 0.00', 'Applied: 0.00', 'Liability: 0.00', 'Outstanding: 12,638.68', and 'Closing Date:'. Below these fields are buttons for 'Download Invoice', 'Email Invoice', 'Download Invoice2', 'b.00', 'Make Deposit', 'Final Payment', 'Post Revenue', 'Close Event', and 'Re-Open Event'. A red arrow points to the 'Post Revenue' button. At the very bottom, there are links for 'Payment Link With Balance Details' and 'Payment Link Without Balance Details'.

PREVENTING 3P PRICE OVERRIDES WHEN USING DISTRIBUTION ENGINE

Wednesday, 24 Jul 2024 11:00 AM

CLUB CADDIE
Bushwood Golf Club

REGISTER TEE SHEET STARTER

TEE SHEET DISTRIBUTION ENGINE

7/24/2024 18 Holes 9 Holes Cart Walk

Heat Map	OPEN	STARTTIME	SENIOR RATE	PEAK WD RIDE	PC TEST	PEAK WD RIDE	ANNUAL W/CART	OWNER CLASS	PGA COMP
4	08:00 AM	\$ 33.00	\$ 82.08	\$ 40.00	\$ 87.00	-	-	-	\$ 0.00
0	08:10 AM	-	-	-	-	-	-	-	-
0	08:20 AM	-	-	-	-	-	-	-	-
4	08:30 AM	\$ 33.00	\$ 82.08	\$ 40.00	\$ 87.00	-	-	-	\$ 0.00
4	08:40 AM	\$ 33.00	\$ 82.08	\$ 40.00	\$ 87.00	-	-	-	\$ 0.00
4	08:50 AM	\$ 33.00	\$ 82.08	\$ 40.00	\$ 87.00	-	-	-	\$ 0.00
4	09:00 AM	\$ 33.00	\$ 87.00	-	-	-	-	-	\$ 0.00
4	09:10 AM	\$ 33.00	\$ 87.00	-	-	-	-	-	\$ 0.00
4	09:20 AM	\$ 33.00	\$ 87.00	-	-	-	-	-	\$ 0.00
4	09:30 AM	\$ 33.00	\$ 87.00	-	-	-	-	-	\$ 0.00
4	09:40 AM	\$ 33.00	\$ 87.00	-	-	-	-	-	\$ 0.00
4	09:50 AM	\$ 33.00	\$ 82.08	\$ 40.00	\$ 87.00	-	-	-	\$ 0.00

Context Menu: Create Block, Remove Block, View Fee Details, View Override Details, **Create Override Rate**

Navigation Steps: Tee Sheet > Distribution Engine Tab > Right-click one or multiple rates > Create Override Rate > Toggle on Prevent Further Override From Other Providers

Feature Explanation: If a user makes an Override Special using the Distribution Engine on the Tee Sheet, they will now have the option to not allow any other price overrides from other third-party Vendors.

Examples: If rain is anticipated, users can choose to discount the prices of those tee times and override distribution engines' pricing, or if users would like to increase particular times of play for various reasons, the same can be done. When associated distribution engines refresh, those times will not be affected.

Add Reservation Rate Override Rules

Provider Name: [] Provider Identifier: [POS]

Class Rate: [] Rack Rate: [Senior Rate]

Start Date: [07/24/2024] End Date: [07/24/2024]

Start Time: [8:50 AM] End Time: [9:40 AM]

Rate (\$): [25]

Prevent Further Override From Other Providers

Save Cancel

SUNRISE/SUNSET AUTO-BLOCKS

Navigation Steps: Settings > Tee Sheet Settings > Course Tee Sheet Setting > Toggle on Enable No Tee Times Block Before Sunrise and After Sunset

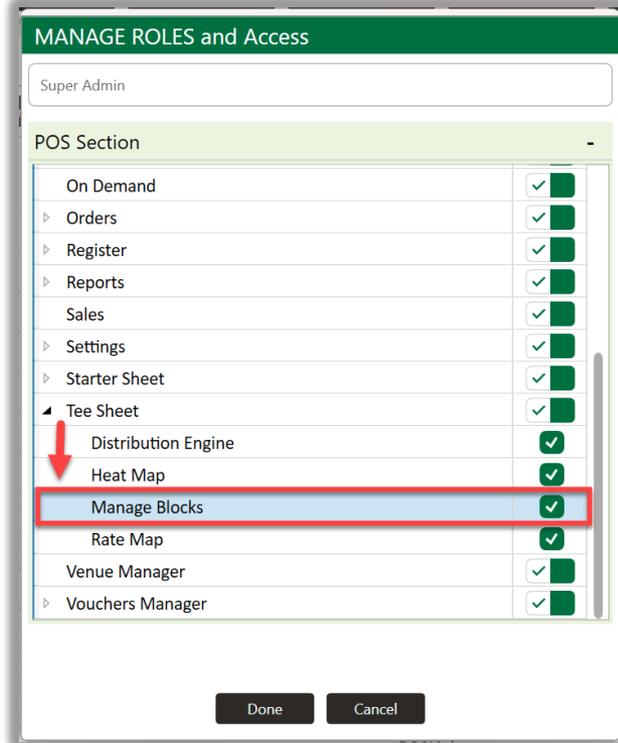
Feature Explanation: Users can enable auto-blocking of the Tee Sheet for Sunrise and Sunset times. This feature will auto-refresh daily and extend up to 90 days out on the tee sheet.

The screenshot displays the Club Caddie interface for Bushwood Golf Club. The top navigation bar includes 'Switch Role', 'Switch Course', 'Sessions', 'Rounds', and 'Balance'. The main menu features icons for Register, Tee Sheet, Starter Sheet, Activities, Venue Manager, Events, On Demand, and Custom. The left sidebar lists various settings like Inventory Center, Manage Roles, Membership Settings, Payroll Center, QuickBooks Integration, RACK Rate Management, Register Settings, and Tax Management. The 'Tee Sheet Settings' section is active, showing 'Course Tee Sheet Setting' and a toggle for 'Enable No Tee Times Block Before Sunrise And After Sunset' which is checked. Below this, there are tabs for 'Tee Sheet Settings', 'Tee Time Policies', 'Rotation Schedule', 'Channel Partner Distribution', 'Reservation Rate/Override Rules', 'Tee Sheet Notes', and 'Starter Sheet Notes'. The 'Tee Sheet Settings' tab shows 'Default Holes Selection For Course' with 9 and 18 holes selected, and the 'Enable No Tee Times Block Before Sunrise And After Sunset' toggle is checked. An inset window shows the 'TEE SHEET' view for Friday, July 05, 2024, with columns for 'FRONT', 'MIDDLE', and 'BACK'. The 'FRONT' column shows a shaded block from 5:30 AM to 6:00 AM with the text 'No Tee Times Before Sunrise'. The 'MIDDLE' column shows a shaded block from 7:10 PM to 7:40 PM with the text 'No Tee Times After Sunset'. The 'BACK' column shows a shaded block from 4:10 PM to 4:30 PM with the text 'No Tee Times After Sunset'. The interface also includes a 'DISTRIBUTION ENGINE' section with filters for 'Today', 'Tomorrow', 'Saturday', and 'Sunday', and a 'Sort By' dropdown set to 'All(0)'. The bottom of the inset shows a list of tee times with 'Add' buttons for each slot.

TEE SHEET MANAGE BLOCK PERMISSION

Navigation Steps: Settings > Manage Roles > Tee Sheet > Manage Blocks

Feature Explanation: New Permission under Tee Sheet for allowing the ability to Edit and Delete Blocks.



ON-DEMAND AVAILABILITY

Navigation Steps: Settings > Register Settings > OnDemand

Feature Explanation: Users can now set a schedule for On-Demand Availability for Delivery and Pickup Schedule.

Examples: The new scheduling feature gives you greater control over when customers can place On Demand orders. You can now set specific days and times when your service is available, creating a custom availability calendar. This means customers will only be able to order during your designated hours, preventing orders from coming in when you're closed, too busy, or otherwise unavailable. The key benefit is that you no longer need to constantly monitor On Demand orders or manually toggle the service on and off. Instead, the system automatically manages order availability based on your preset schedule.

The screenshot shows the 'On Demand' settings window with a green header and a close button. Below the header is a large empty white box. Underneath is the 'Delivery Schedule' section. It features a toggle for 'On Demand Delivery Order Availability' set to 'On'. Below this are two scheduling sections: 'Schedule for Weekdays' and 'Schedule for Specific Periods'. Each section contains a table with columns for Day Of Week, Start Time, End Time, and Action, and an 'ADD' button below the table.

Day Of Week	Start Time	End Time	Action

ADD

Start Date	End Date	Start Time	End Time	Action

ADD

The screenshot shows the 'On Demand' settings window with a green header and a close button. Below the header is the 'Order Cancellation Time (Minutes)' section, which includes a text input for 'Order Cancellation Time (minutes)' with the value '5' and a 'Save' button. Below this is the 'Pickup Schedule' section. It features a toggle for 'On Demand Pickup Order Availability' set to 'On'. Below this are two scheduling sections: 'Schedule for Weekdays' and 'Schedule for Specific Periods'. Each section contains a table with columns for Day Of Week, Start Time, End Time, and Action, and an 'ADD' button below the table.

Order Cancellation Time (minutes) 5 Save

Day Of Week	Start Time	End Time	Action

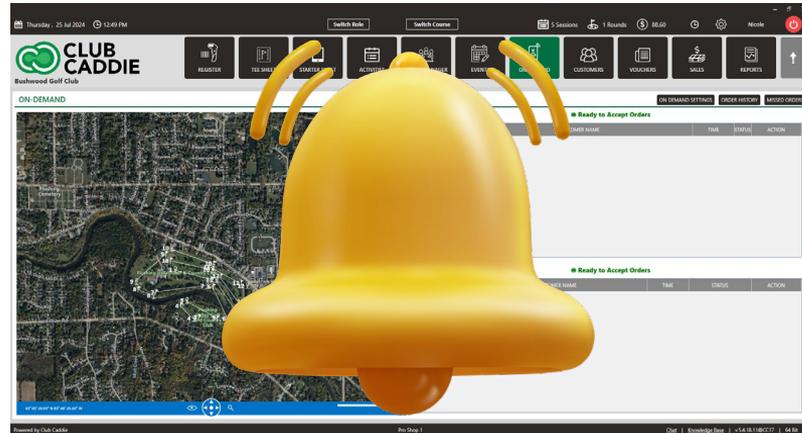
ADD

Start Date	End Date	Start Time	End Time	Action

ADD

ON-DEMAND SOUND NOTIFICATION

Feature explanation: New, sound notification for when there are new On-Demand Orders to enhance awareness.

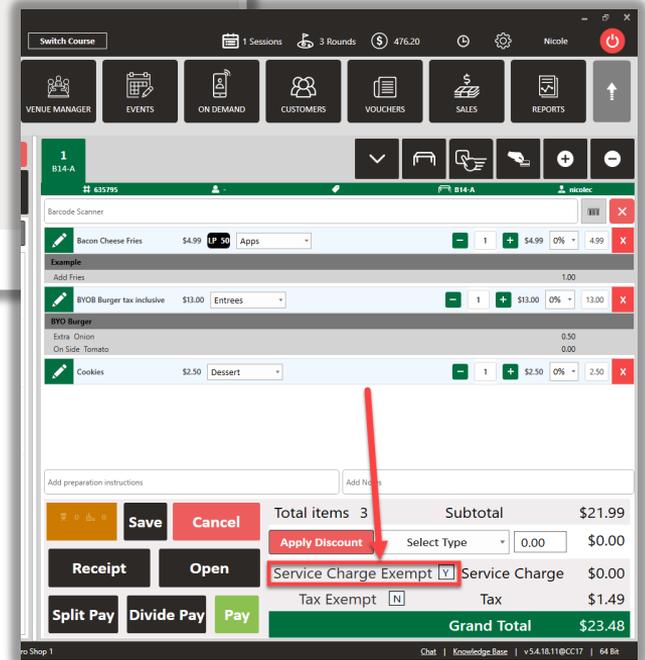
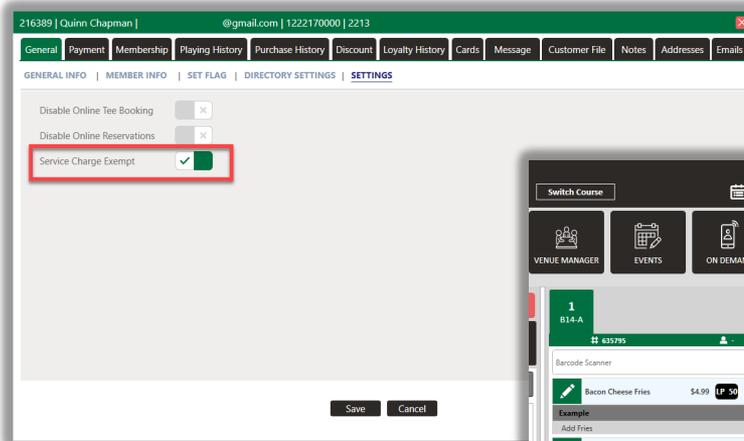


SERVICE CHARGE EXEMPT

Navigation Steps: Customer/Member Profile > General Tab > Settings > Service Charge Exempt Toggle

Navigation Steps: Register > Tab > Click the box for 'Y' or 'N' Service Charge Exempt

Feature Explanation: New functionality to mark both a Tab in the Register and a Customer Profile as Service Charge Exempt.



SALES BY MONTH BY SKU TOTALS

Navigation Steps: Reports > Sales by Month by SKU Report

Feature Explanation: There are now totals for each GL Account in the Sales by Month by SKU Report.

The screenshot displays the Club Caddie software interface. At the top, there's a navigation bar with the Club Caddie logo and several menu icons. The main content area shows a report titled "SALES BY MONTH BY SKU" for the month of July 2024. The report is a table with the following columns: GL Account, Item Description, Qty, and Pre-Tax Value. The data is organized into several categories, each with a sub-total highlighted in red:

GL Account	Item Description	Qty	Pre-Tax Value
-	18 Hole Cart Fee	11	\$ 161.56
-	2022 t-shirt hat	1	\$ 25.00
-	GC Logo Hat	1	\$ 3.00
	Total	13	\$189.56
11 - Merchandise Sales	Chromesoft TuVis SI	2	\$ 23.90
	ERIC Soft Sleeve	3	\$ 29.85
	NXTTourTourS Sleeve	3	\$ 26.97
	SuperHot Sleeve	1	\$ 7.99
	11 - Merchandise Sales Total	9	\$88.71
12 - Food Sales	Buffalo Chicken Nachos	1	\$ 9.00
	Jumbo Chicken Wings	2	\$ 16.00
	12 - Food Sales Total	3	\$25.00
14 - Beer Sales	Labatt Blue	1	\$ 2.83
	Pitcher (craft)	3	\$ 40.50
	14 - Beer Sales Total	4	\$43.33
7 - Green Fees	05 Member GF	1	\$ 0.00
	1 HR	3	\$ 400.00
	Member GF	1	\$ 0.00
	Peak W/D Ride GF	1	\$ 67.08
	Senior GF	4	\$ 75.44
	Weekday Member GF	3	\$ 0.00
	Weekday Member GF (1)	3	\$ 60.00
	7 - Green Fees Total	16	\$602.52
8 - Cart Fees	Colonial Cart Test	1	\$ 0.00

The interface also includes a sidebar with various navigation options, a top navigation bar with user information and settings, and a footer with system information.