



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.

The screenshot displays a software interface for a golf club, Bushwood Golf Club. The top navigation bar includes options like 'REGISTER', 'TEE SHEET', 'STARTER SHEET', 'ACTIVITIES', 'VENUE MANAGER', 'EVENTS', 'ON DEMAND', 'CUSTOMERS', 'VOUCHERS', 'SALES', and 'REPORTS'. The main area shows an 'EVENT CALENDAR' for July 2024, with a legend for 'Proposed Events' (yellow) and 'Tentative Events' (grey). A specific event, 'Wingate Wedding - 7/14/2024', is highlighted in the calendar. Below the calendar is the 'EDIT BANQUETS MANAGER' window, which contains a form for event details. The form includes fields for 'Customer Name' (Heather Wingate), 'Address', 'Phone' (3034084602), and 'Email' (heatherwingate@outlook.com). The 'Name of Event' field is 'Wingate Wedding - 7/14/2024', and the 'Confirmation Status' dropdown menu is set to 'Tentative', which is highlighted with a red box. Other fields include 'Event Date' (7/14/2024), 'Preliminary Guest Count' (120), and '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 Ons | Instructions | Payment | Event Notes | Ledgers | Event Tracking

BEO Number: 1022 (Bookings Date: Jul-18-2024)

Customer Name: Grant Wingate | Customer Name: Mackenzie Lauder

Address: | Address: |

Phone: 3034004601 | Phone: 5554563450

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

Type Of Event: Wedding
Venue: Clubhouse
*Event Time: 2:00 PM | 11:00 PM
Final Guest Count: | Verified
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

Tabs: EVENT BUILDER | FUNCTION SHEET | COMMUNICATION | ATTACHMENTS

Sub-tabs: Event Details | **Event Timeline** | Venue | Floor Plan | Menu | Add On | 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			
Ceremony	07/14/2024	16:00	07/14/2024	17:00	ests are allowed to sit 30 minutes bet			

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

Settings | **Event Settings** | Departments

DEPARTMENTS

Event Type	Event Title	Event Type	Event Title	Event Type	Event Title	Event Type	Event Title	Event Type	Event Title
Reception Set Up	Banquet	Reception Set Up	Banquet	Reception Set Up	Banquet	Reception Set Up	Banquet	Reception Set Up	Banquet
Course Set Up	Banquet	Course Set Up	Banquet	Course Set Up	Banquet	Course Set Up	Banquet	Course Set Up	Banquet
Registration Set Up	Banquet	Registration Set Up	Banquet	Registration Set Up	Banquet	Registration Set Up	Banquet	Registration Set Up	Banquet
Waterfall	Banquet	Waterfall	Banquet	Waterfall	Banquet	Waterfall	Banquet	Waterfall	Banquet
Ceremony Set Up	Banquet	Ceremony Set Up	Banquet	Ceremony Set Up	Banquet	Ceremony Set Up	Banquet	Ceremony Set Up	Banquet

ADD EVENT TYPE DEPARTMENT

Event Type: Banquet

Title: Reception Set Up

Description: Drapery Suspended

Default Instructions:

- # of Rounds -
- Green Color -
- Green Tee -
- Special Lines -
- Complimentary -
- Cake Cutting Table -
- Special Book Table -
- Gift Table -

On Course Set Up:

- On Course Cart -
- Service Station -
- High Sponsor -
- Registration Table -
- Chairs -
- Annex Table -
- Seating Tables -

Waterfall includes temperature to and from the waterfall area
 Waterfall may be discontinued due to inclement weather up to 48h

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

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 Ons | Instructions | Payment | Event Notes | Ledgers | Event Tracking

Location	Venue	Start Date/Time	End Date/Time	Set Up/Minutes	Tear Down/Minutes	Timeline 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 10:31 PM

Switch Rule | Switch Course | 1 Sessions | 3 Rounds | 476.20 | Nicole

CLUB CADDIE

BUSHWOOD GOLF CLUB

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

14 July 2024

14 SUNDAY

CLUBHOUSE BANQUET HALL

CLUBHOUSE Brides Room BANQUET HALL ROOM A BANQUET HALL HALL

10:00 AM

11:00 AM

12:00 PM

1:00 PM

2:00 PM

3:00 PM

4:00 PM

5:00 PM

Powered by Club Caddie

Pro Shop 1

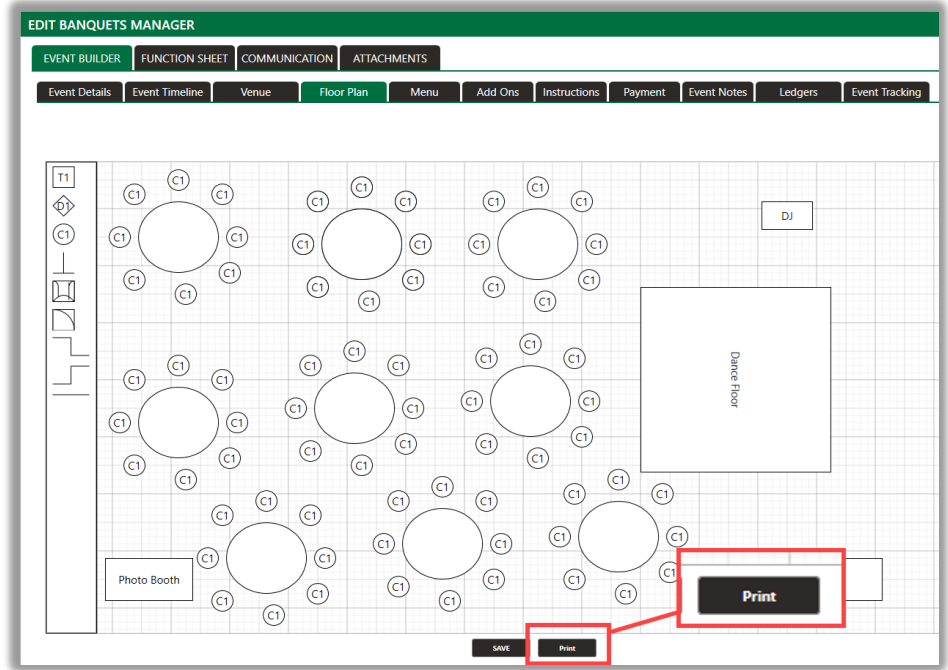
Clubhouse Work Order: 11842024 E Co. | Knowledge Base | v5.4.18.1100017 | 14 88

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.



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 navigation tabs: 'EVENT BUILDER', 'FUNCTION SHEET', 'COMMUNICATION', and 'ATTACHMENTS'. Below these are sub-tabs: 'Event Details', 'Event Timeline', 'Venue', 'Floor Plan', 'Menu', 'Add Ons', 'Instructions', 'Payment', 'Event Notes', 'Ledgers', and 'Event Tracking'. The main content area is titled 'BANQUET EVENT PAYMENT' and contains a table with columns for 'Event Id', 'Amount', 'Created At', and 'Updated At'. Below the table, there are input fields for 'Total' (12,638.68), 'Deposits' (0.00), 'Applied' (0.00), 'Liability' (0.00), and 'Outstanding' (12,638.68). A 'Closing Date' field is also present. At the bottom, there are several buttons: 'Download Invoice', 'Email Invoice', 'Download Invoice?', '0.00', 'Make Deposit', 'Final Payment', 'Post Revenue' (highlighted with a red box and a red arrow), 'Close Event', and 'Re-Open Event'. There are also links for 'Payment Link With Balance Details' and 'Payment Link Without Balance Details'.

This is a Managed Role Feature: Setting → Manage Roles → Action → Edit Permissions → Event Manager → Post Revenue.

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

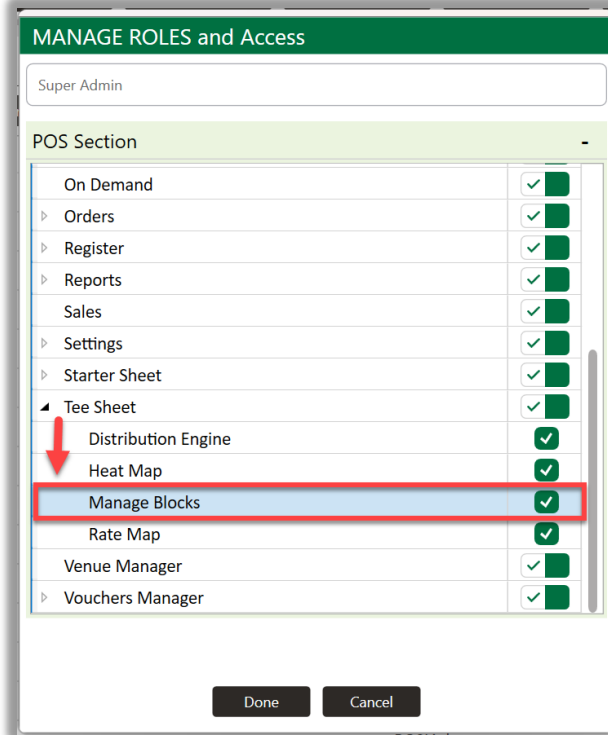
Feature Explanation: Users can enable auto-blocking of the Tee Sheet for Sunrise and Sunset times. This feature will auto-refresh daily and extend up to 90 days out on the tee sheet.

The screenshot displays the Club Caddie interface for Bushwood Golf Club. At the top, the date is Tuesday, 23 Jul 2024, and the time is 11:18 AM. The user's role is 'Switch Role' and the current course is 'Switch Course'. The interface includes a navigation bar with icons for REGISTER, TEE SHEET, STARTER SHEET, ACTIVITIES, VENUE MANAGER, EVENTS, ON DEMAND, and CUSTOM. Below the navigation bar, the 'Tee Sheet Settings' section is active, showing 'Course Tee Sheet Setting' with a toggle for 'Enable No Tee Times Block Before Sunrise And After Sunset' set to 'ON'. The 'Default Holes Selection For Course' is set to 9 and 18. A smaller inset window shows a detailed view of the tee sheet for Friday, July 05, 2024, with a 'No Tee Times Block Before Sunrise' and 'No Tee Times Block After Sunset' indicated.

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.

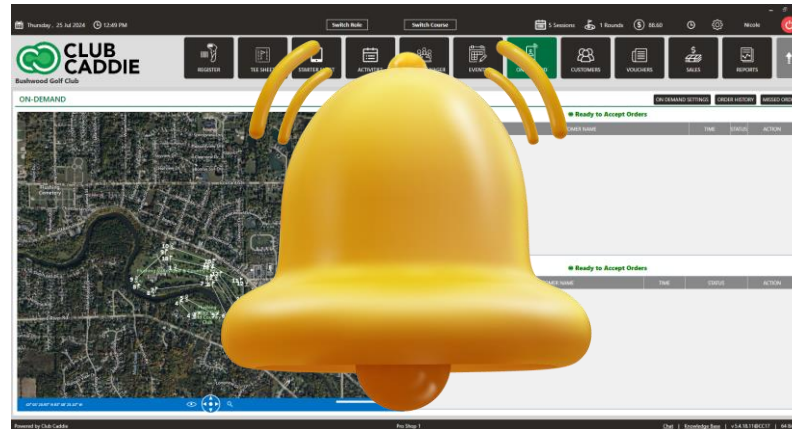
Examples: The new scheduling feature gives you greater control over when customers can place On Demand orders. You can now set specific days and times when your service is available, creating a custom availability calendar. This means customers will only be able to order during your designated hours, 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 page for Delivery Schedule. At the top, there is a green header with the text 'On Demand' and a close button. Below the header is a large empty white box. Underneath, the section is titled 'Delivery Schedule'. It features a toggle for 'On Demand Delivery Order Availability' set to 'On'. Below this, there are two 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.

The screenshot shows the 'On Demand' settings page for Pickup Schedule. At the top, there is a green header with the text 'On Demand' and a close button. Below the header, the section is titled 'Order Cancellation Time (Minutes)'. It features a text input field for 'Order Cancellation Time (minutes)' with the value '5' and a 'Save' button. Below this, the section is titled 'Pickup Schedule'. It features a toggle for 'On Demand Pickup Order Availability' set to 'On'. Below this, there are two 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.

ON-DEMAND SOUND NOTIFICATION

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

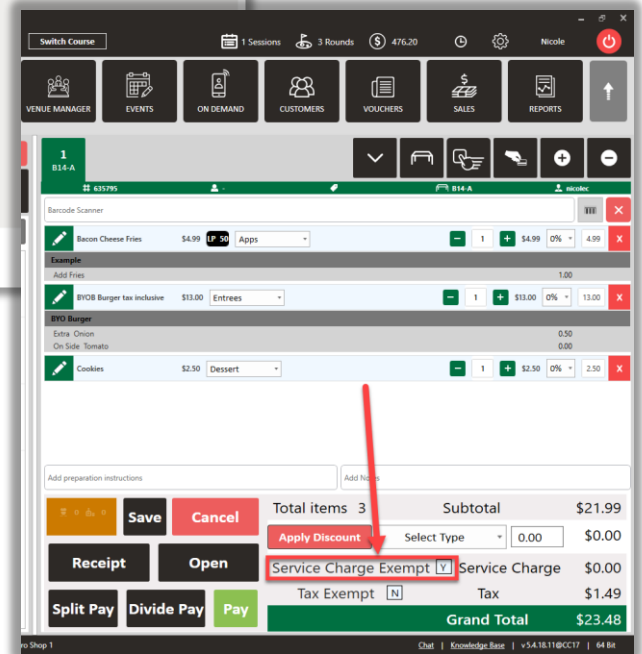
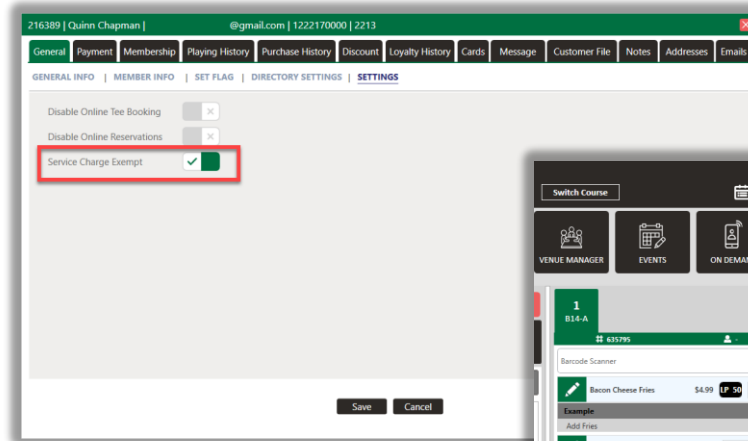


SERVICE CHARGE EXEMPT

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 for the Bushwood Golf Club. The main report is titled "SALES BY MONTH BY SKU" and is filtered for July 2024. The report shows a list of GL Accounts with their respective sales data. The following table represents the data shown in the screenshot:

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