



a *JOTAS* Software Company



NEW FEATURES

5.4.28

LOOPER AI SUPPORT INTEGRATION

Navigation Steps: In-App “Chat” option lower right screen → Pop-up Looper AI Support

Feature Explanation: Looper AI Support provides instant, guided assistance directly within the software interface. Users can ask “how-to” questions, follow step-by-step walkthroughs, and receive contextual help—all without leaving their workflow. Looper reduces dependency on external support and accelerates onboarding and troubleshooting.

Tips & Tricks:

- To close the Looper window, click the “Chat” Icon.
- Try typing “How do I add service charge to a tab?” to see guided responses in action.
- Use for quick refreshers—ideal for new hires or rarely used tasks.

The screenshot displays the Club Caddie software interface. At the top, there's a navigation bar with options like REGISTER, TEE SHEET, STARTER SHEET, ACTIVITIES, and VENUE MANAGER. Below this is a calendar view for Thursday, May 29, 2025, showing a grid of time slots for the front and back tees. A 'Chat' button is visible in the bottom right corner of the interface. A red box highlights the 'Chat' button and the 'Looper AI Chat Support' pop-up window that appears when it is clicked. The pop-up window contains a message from Looper AI, a user question, and a list of instructions on how to use the software's blocking features.

Looper AI Chat Support

Meet Looper, your trusty assistant for Club Caddie's golf management software. Currently in beta, Looper is here to help you troubleshoot issues and learn how to use the software effectively. Need to chat with a Team Member? Just type "escalate" at any time!

Hello, how can I help you?

Hi, can you help me block a tee times on the tee sheet

1. Click on the "TEE SHEET" module from the navigation menu.
2. There are two ways to block a group of tee times:
 - o Method 1: Right-click on a time slot and hover over "Block Slot," then select one of the five options from the drop-down list:
 1. "9 Hole Only Block" option will only allow you to book for 9 Holes.
 2. "18 Hole Only Block" option will only allow you to book for 18 Holes.
 3. "No Online Bookings" option will prevent new online bookings.
 4. "No Tee Times Block" option will prevent tee-time bookings online as well as warn on-site users when attempting to book within the blocked slot.
 5. "Turn Time Only Block" option will prevent time from being booked. Enter the required information, including the start and end time and a reason for the block, e.g., "Birthday Celebration".
 - o Method 2: Click on a starting time slot and

Send a message

Powered by Club Caddie | Knowledge Base | v5.4.28.2@CC30 | 64 Bit

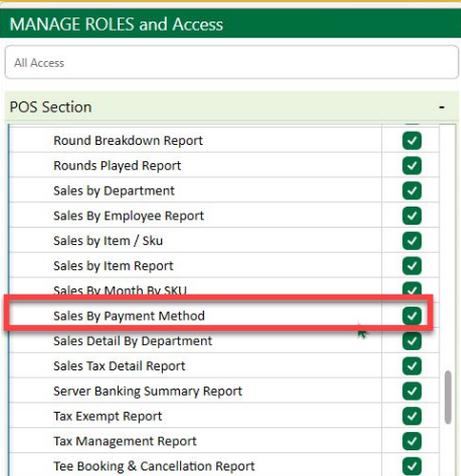
SALES BY PAYMENT METHOD

Navigation Steps: Reports → Sales By Payment Report

Feature Explanation: The highly requested Sales by Payment Method Report is here. This new report gives staff visibility into sales broken down by each payment method used, such as membership, voucher, event, and any other custom payment types defined in your system. It provides an easy way to track revenue by payment category and supports export to Excel format for deeper analysis or recordkeeping.

Tips & Tricks:

- Be sure to **enable access** to this report for any user roles that need to view it.



Monday, 02 Jun 2025 11:54 AM

Switch Course 0 Sessions 0 Rounds \$ 0.00

Club Caddie

Links at Club Caddie

REGISTER TEE SHEET STARTER SHEET ACTIVITIES VENUE MANAGER EVENTS CUSTOMERS VOUCHE

SALES BY PAYMENT METHOD Note: Payment amounts are equally distributed among methods, with v

1/1/2025 6/2/2025 Custom Start Time End Time Search

All All All All Include sub department Incl

Item Description	Qty	Cash	Check	Membership	Credit Voucher	CardConnect	Event
Department : Credit Voucher	12	\$ 630.00	\$ 0.00	\$ 0.00	\$ 25.00	\$ 0.00	\$ 0.00
Sub-Departments : Credit Vo	12	\$ 630.00	\$ 0.00	\$ 0.00	\$ 25.00	\$ 0.00	\$ 0.00
Category : Credit Voucher	12	\$ 630.00	\$ 0.00	\$ 0.00	\$ 25.00	\$ 0.00	\$ 0.00
\$10.00 Credit Voucher	2	\$ 0.00	\$ 0.00	\$ 0.00	\$ 20.00	\$ 0.00	\$ 0.00
\$5.00 Credit Voucher	1	\$ 0.00	\$ 0.00	\$ 0.00	\$ 5.00	\$ 0.00	\$ 0.00
\$200.00 Credit Voucher	1	\$ 200.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
\$5.0 Voucher Deposit	1	\$ 5.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
\$5.00 Voucher Deposit	5	\$ 25.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
\$200.0 Voucher Deposit	2	\$ 400.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
Department : Tee Time	6	\$ 130.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
Sub-Departments : Booking	6	\$ 130.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00

Tee Booking & Cancellation Report

Terminal Closing Report

Terminal Summary

Sales By Payment Method

Tip Ledger Report

Tips Summary

Trend Report

Variance Report

Void/Return Report

YellowDog One Way Sync

ENHANCED REGISTER SEARCH FUNCTIONALITY

Navigation Steps: Register → Search Bar OR Inventory → Items → Search

Feature Explanation: Users can now search for items using SKU or Inventory Item ID, significantly reducing the time it takes to locate specific products.

Tips & Tricks:

- Partial SKUs will work once you start to enter on the SKU number
- Helpful for POS teams familiar with SKU-based lookup

The screenshot displays the Club Caddie POS interface. At the top, there's a navigation bar with icons for REGISTER, TEE SHEET, STARTER SHEET, ACTIVITIES, VENUE MANAGER, EVENTS, ON DEMAND, and CUSTOMERS. Below this is a search bar, which is highlighted with a red box. A red arrow points from the search bar to the 'SKU/PU Code' field in the item details section, which also contains the value '65165161565'. The item details section shows various fields for Department, Sub Department, Category, Manufacturer, Type, Item, and Total Item Stock. Below these are fields for Modifier Title, Selling Price, Extra Price, Default Item, and [No/Extra/On Side] Available. At the bottom, there are buttons for Update, Print Label, and Close.

CUSTOMER MERGE FUNCTIONALITY

Navigation Steps: Customers → Customer Tools → Merge Customers

Feature Explanation: The Merge Customers tool allows staff to consolidate duplicate or secondary customer profiles into a single master record. This unified profile includes total play history, purchases (e.g., punch cards, merchandise, lessons), and membership details. The process helps maintain clean data, ensures accurate reporting, and improves the customer experience by eliminating fragmented records. Once merged, secondary accounts are archived and no longer active.

Tips & Tricks:

- **One-Way Merge:** Merges are permanent—once completed, data from secondary profiles cannot be reattached even if unarchived.
- **Verify Before Merging:** Review all accounts beforehand to catch payment discrepancies or conflicts.
- **Permissions:** Only users with Merge Customers access can perform this action—check your role settings.
- **One-Course Context:** Only accounts tied to your current course context can be selected for merging.
- **Reporting Tip:** After merging, run a Customer Activity Report to verify that the master account reflects the correct history.

The screenshot displays the Club Caddie software interface. At the top, there's a navigation bar with a date and time (Thursday, 29 May 2025, 12:20 PM), a 'Switch Course' button, and user information (1 Rounds, \$ 0.00, Nicole). Below this is a main menu with icons for REGISTER, TEE SHEET, STARTER SHEET, ACTIVITIES, VENUE MANAGER, EVENTS, ON DEMAND, and CUSTOMERS. The CUSTOMERS button is highlighted in green. Below the main menu, there are tabs for 'All Customers', 'Archived Customers', and 'Customer Tools'. The 'Customer Tools' tab is highlighted in green, and a 'Merge Customers' button is visible within it, also highlighted in red. A red arrow points from this button to a modal window titled 'Merge Customers'. The modal window contains a note: 'Note: After Clicking on Merge Primary Customer merges the Secondary Customers into it.' It has two sections: 'Select Primary Customer' with a '+' icon and a form for Customer Name, Address, Phone, and Email; and 'Select Secondary Customers' with a '+' icon and a table with columns for First Name, Last Name, Email, and Action. A 'Merge' button is at the bottom of the modal.

UNIQUE EMPLOYEE IDENTIFIER FOR 3P PAYROLL SOFTWARE

Navigation Steps: Settings → Course User Info → Add New User/Edit → External Payroll ID

Feature Explanation: Introduces an External Payroll ID field to support integration with third-party payroll systems. These IDs are included in payroll exports, ensuring consistent employee tracking and simplifying cross-platform data flow.

Tips & Tricks:

Display in Export: In the Payroll Center, under Payroll Summary, there is now a new column for Payroll ID included in the export file.

Refresh Tip: After adding an External Payroll ID, you must log out and log back in for the system to fully apply the update.

The screenshot displays the Club Caddie software interface for a course user. The main area shows a table of course users with columns for User Name, First Name, Last Name, and a dropdown menu for 'UPDATE USER'. The dropdown menu includes fields for First Name, User Name, Phone No., User Status, and User Tab Color. The 'Payroll Center' button is highlighted in the left sidebar. The 'Payroll Summary' table shows columns for Payroll Id, Employee, Role, and Approved. The 'Payroll Center' button is highlighted in the left sidebar.

USER NAME	FIRST NAME	LAST NAME	UPDATE USER
cannon	Drew	Ca	First Name Drew
Jordan	Jordan	Ho	User Name cannon
grantcc	Grant	Wi	Phone No.
RafikN	Rafik	Nik	User Status Active
golftest1	golftest	tes	User Tab Color Yellow
phamilton1	Patrick	Ha	
plantationlakesgol	Plantation Lakes	Go	
mbrown	Michael	Br	
phamilton	Patrick	Ha	
adam30	Adam	Ba	
mguidry	Megan	Guidry	megannguidry@gr
stanfordstaff	Stanford	Staff	N/A
tylerb	Tyler	Borjesson	tylerborjesson@gr
Paul	Paul	LeVie	paul.levie@gmail.c
lignoniercc	Lignonier	Country Club	beth@lignoniercour
fairmontfc	Fairmont	Field Club	wvrupd@gmail.com
grant	Grant	Winnata	grant@clubcaddie

Payroll Id	Employee	Role	Approved
		Super Admin	1
	TimeLog Entries		3/18/2025
	Travis Young		
		Bartender/Server	2
	TimeLog Entries		2/4/2025 1
	TimeLog Entries		3/12/2025

MULTI-COURSE PUNCH CARDS

Navigation Steps: Course A Settings - Punch Card Type Center - Add - Enter Title of Punch Card - Punch Card Type Rate Tab - Add your Rack Rate/Class rate - Enter Rate and Quantity - Save

Next you will need to switch the course - Settings - Punch Card Type Center - Find the punch card just created - Punch Card Type Rate Tab - Add Rack Rate/Class Rate - Enter Rate and Quantity - Save

Feature Explanation: Multi-Course Punch Cards let you sell “bundles” of rounds (e.g. 10-round course A 5 rounds course B) that can be redeemed across multiple courses or clubhouses. You define a single punch-card type and then assign course-specific rates so that members enjoy flexible access without juggling separate cards. Once a punch card is sold, when entering a customer with a multi course punch card the punch card rate will show when booking their tee time and will reflect the rate that applies to that course.

Example: A punch card sale allows golfers to pre-purchase a set number of discounted rounds, which they redeem over time.

You sell a punch card that includes:

- **5 punches** – each redeemable for **25% off an 18-hole round**
- **10 punches** – each redeemable for **25% off a 9-hole round**

Golfers use one punch per round, receiving the discount automatically at redemption. It's a great way to reward loyal players and drive repeat play.

Friday, May 30, 2025 - 2:30 PM

When: 2:30 PM Where: Links at Club Caddie

Select Holes: 9 18 Select Players: 1 2 3 4

Player	Add	Search	Last Name	First Name	Member No	Email Address	Mobile Number	Class - Walk/Ride	Rate	Cart	Action
P1	+	Q	O'Brien	Brendan		brendan@clubca		18H May Weekday Rid	\$50.00	#	👁️ ✖️

PI Notes

Class - Walk/Ride	Rate
Two Course Punch Card	\$50.00
18H May Weekday Walk - Wal	\$50.00
WD Ride 18 - Ride	\$50.00
Cart Fee Only - Ride	\$20.00
Comp 18 - Ride	\$0.00

Add Note

Turn When: 4:30 PM Turn Where: Links at Club Caddie

Quick Pay Checkin Split Reserve Reserve Cancel

Total Amount \$50

Send Confirmation Email

SWITCH TEE SHEET/COURSE ENHANCEMENTS

Navigation Steps:

Course A - Settings - Tee sheet settings - Course tee sheet settings

Enter: Course Name (e.g., "Championship 18")

Choose Hole Count (9, 18, 27, etc.)

Switch to course B - Settings - Tee sheet settings - Course tee sheet settings

Enter: Course Name (e.g., "Exec 9 holes ") & Hole Count (9, 18, 27, etc.)

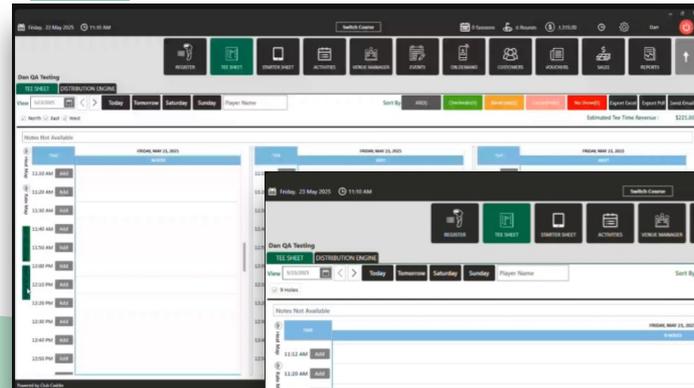
Tips & Tricks:

Course A, you might set Max Players to 10 and the tee-time interval to 8 minutes. When you switch to Course B using the Course Selector, those values carry over—but you can override them as needed, such as changing Max Players to 8 for a more compact layout.

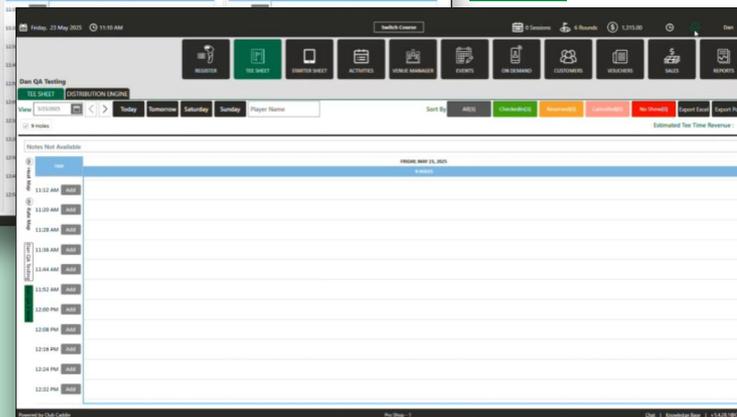
Global Settings — These settings apply across all courses unless a course-specific override is configured. They include sales tax, rack rate visibility in tee times, POS booking window, tee time squeeze logic, block turn times, turn minutes, past booking permissions, cart agreement receipt behavior, confirmation email/text configuration, prepaid liability handling, tee times as inventory, all online tee time settings, and the billing policy.

Feature Explanation: TSwitch Course Enhancements allow staff to toggle between different golf courses (e.g., Championship 18, Executive 9) while preserving tee sheet variables unique to each course. Understanding the difference between per-course and global settings ensures precise control and prevents accidental system-wide changes.

Course A



Course B



CLOVER FLEX PROCESSING SPEED ENHANCEMENTS

Navigation Steps: Customer Portal → Profile Settings → Payment Method



Feature Explanation: Faster transaction processing times!

