CLUB CADDIE
a Jonas Software Company

NEW FEATURES

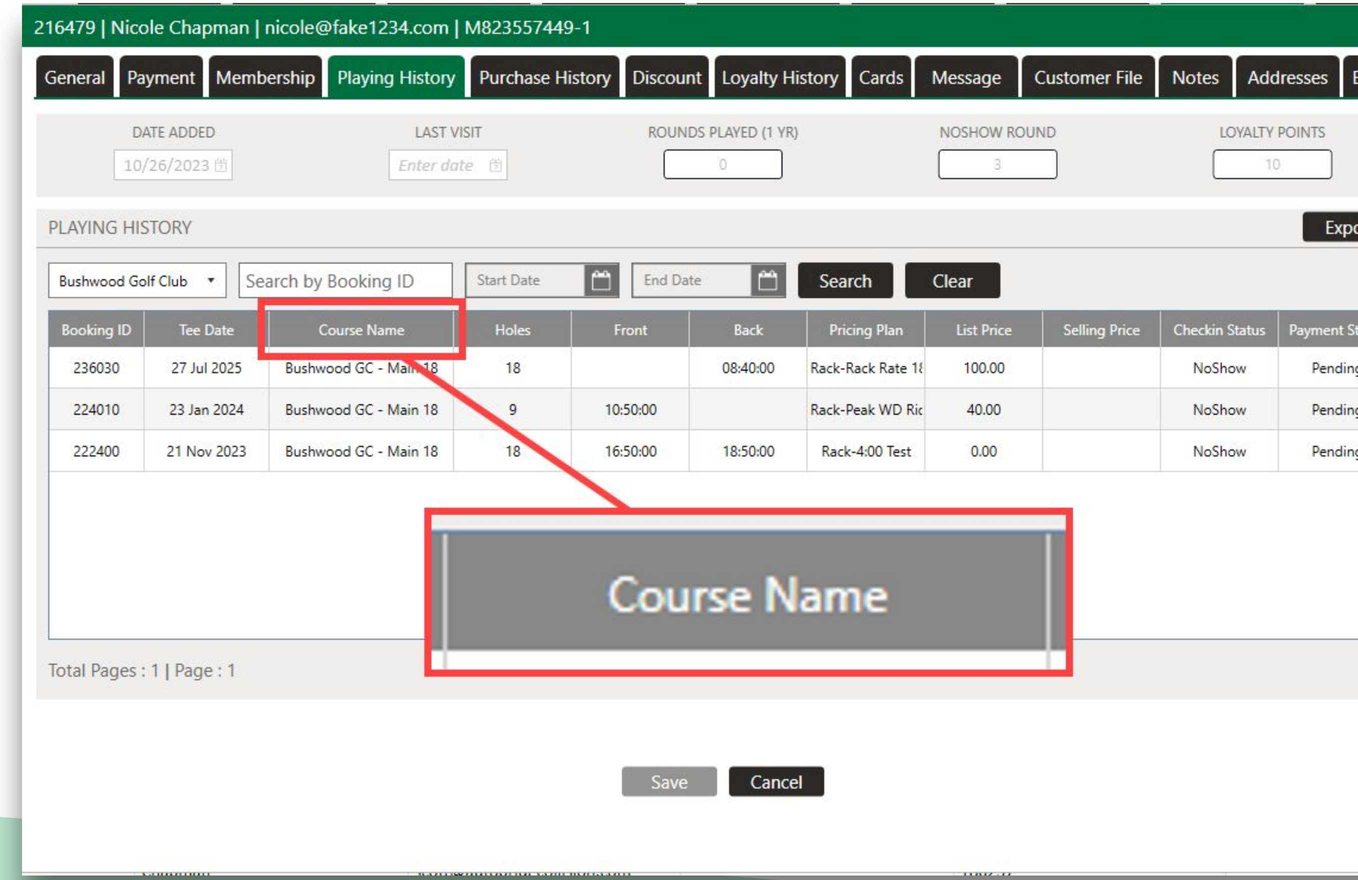
5.4.35

COURSE NAME IN PLAYING HISTORY

Navigation Steps: Customer Profile → Playing History → Course Name column visible

Feature Explanation: The Playing History section now includes a **Course Name** column for each round, visible at a glance.

- Multi-course facilities previously had no quick way to tell which course a customer played.
- Staff had to cross-reference other reports to determine where a round was played.
- The Course Name is now visible directly in Playing History for each entry.



Good to Know:

- Most relevant for multi-course facilities. Single-course facilities will see their course name listed for each entry.

For a detailed guide, visit our [Knowledge Base Article.]()

VOUCHER DEPARTMENT RULES

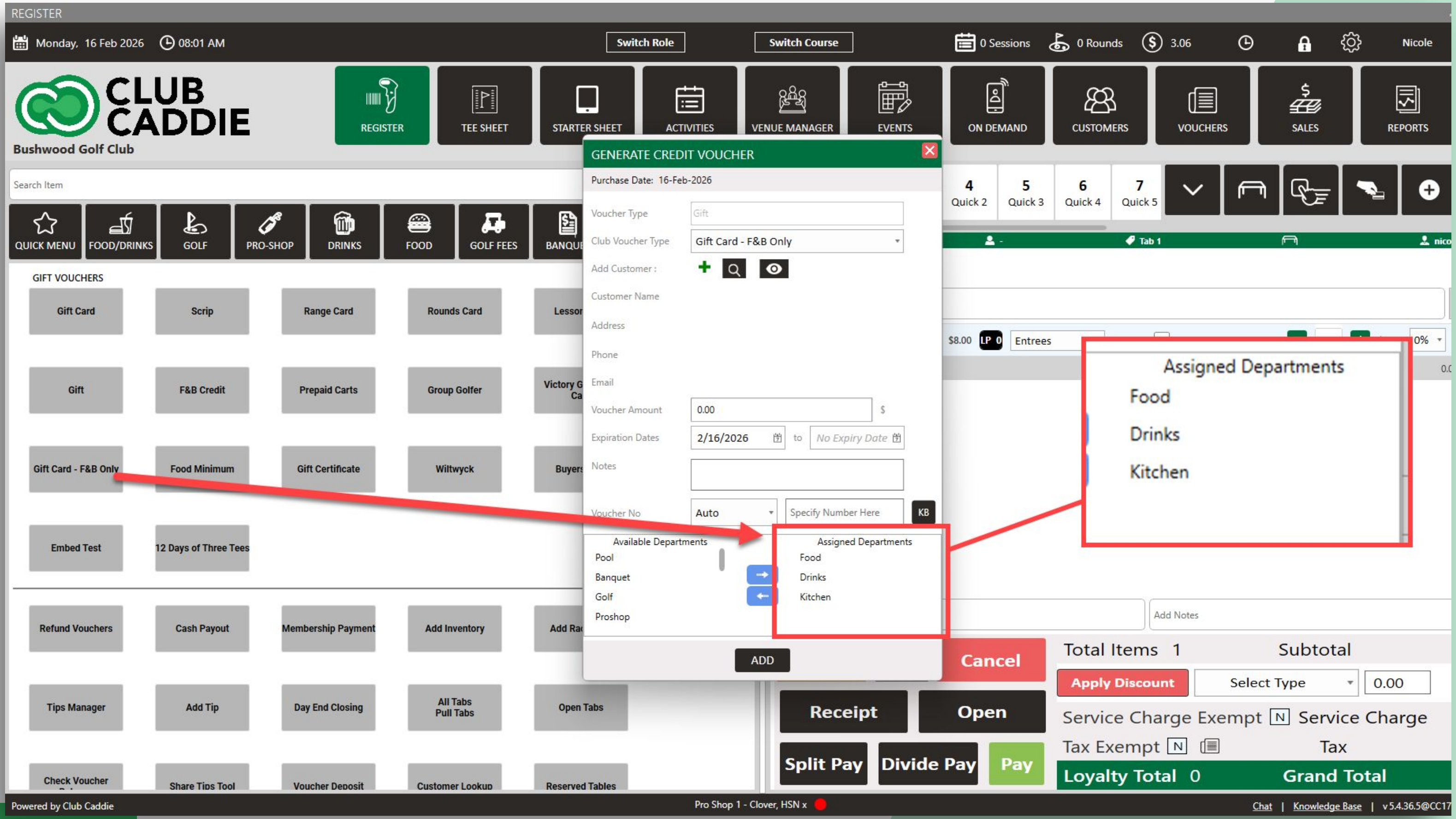
Navigation Steps: Settings → Register Settings → Club Voucher Types → Select Type → Set Departments

Feature Explanation: You can now pre-select which **Departments** are applicable to each **Voucher Type** directly from Club Voucher Type settings.

- Previously, department rules had to be set manually after each voucher sale.
- Now department restrictions are set once at the voucher type level and automatically apply to every new voucher sold.

Good to Know:

- These rules are not retroactive — they apply as presets when new vouchers are sold.
- Existing vouchers already in circulation are not affected.



For a detailed guide, visit our Knowledge Base Article.

AGING REPORT NEW FILTERS

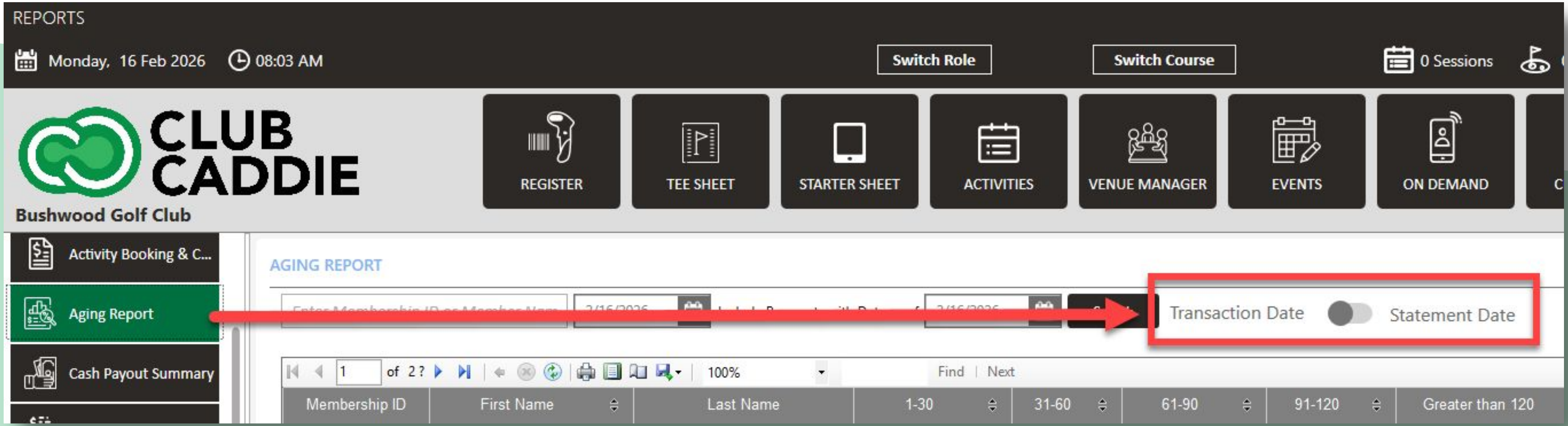
Navigation Steps: reports Aging Report → Select Transaction Date or Statement Date filter

Feature Explanation: The Aging Report now includes a filter to choose aging based on the **Transaction Date** or the **Statement Date**.

- Previously, aging was based only on the transaction date — creating a mismatch for statement-cycle billing.
- Facilities can now run the report in the way that best matches their billing and collections workflow.
- Helps accurately assess late fees and collect on outstanding accounts.

Good to Know:

- If your facility does not have member billing set up, the report will not populate any data.



For a detailed guide, visit our Knowledge Base Article.

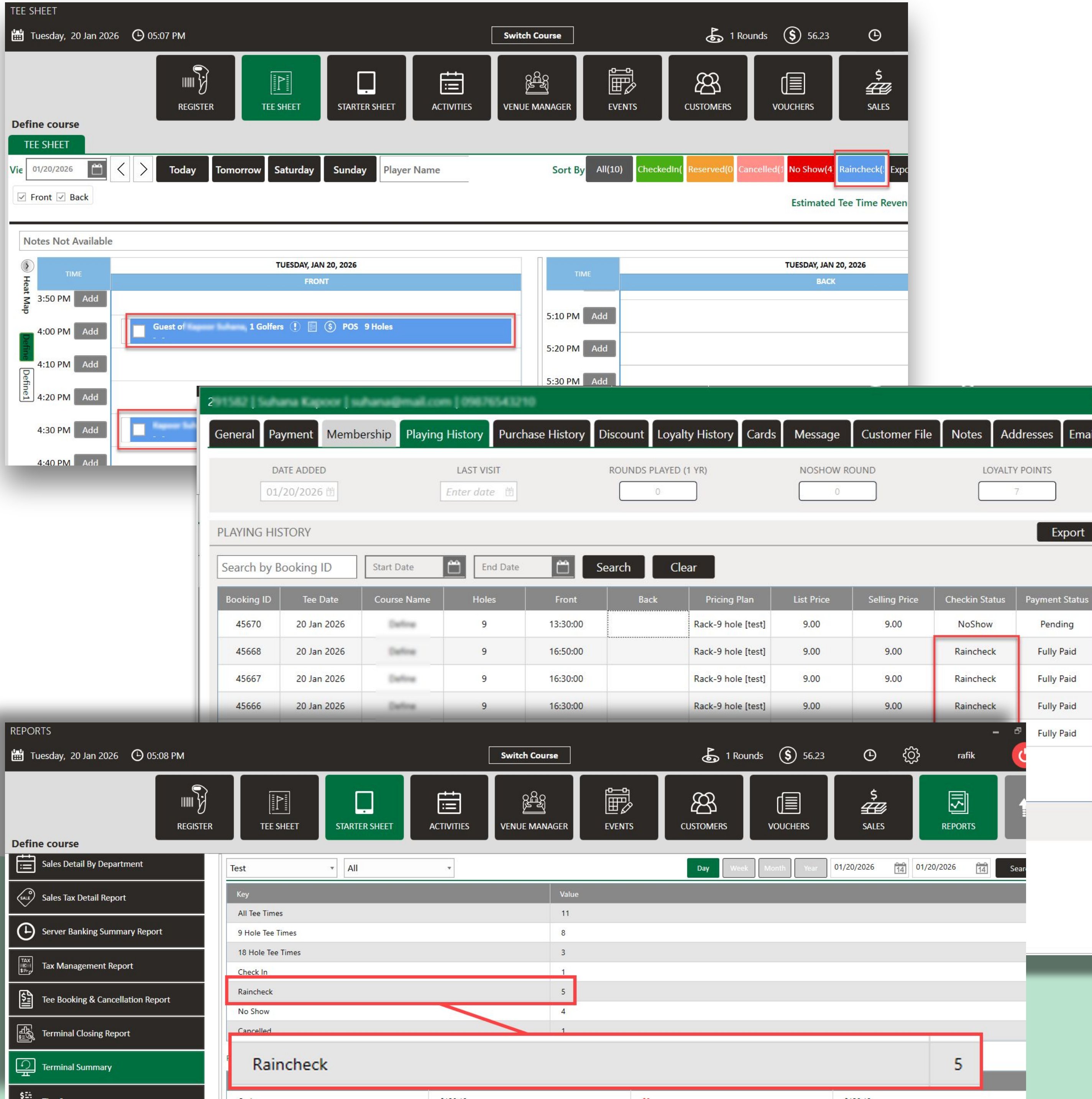
Tee Sheet / Customer Profile

NO-SHOW & RAIN CHECK STATUS

Navigation Steps: Customer Profile → Playing History | Tee Sheet (Rain Check = blue) | Golf Reports

Feature Explanation: Playing History now displays a status for each tee time including Rain Check and No-Show. Rain Checks also appear as a blue color on the Tee Sheet. New fields added to Rounds Breakdown and Rounds Played Reports.

- Previously, issuing a rain check applied to no-show counts.
- Now there is a clear distinction between actual no-shows and rain checks across the system.
    - **Daily Course Summary —** Raincheck count added as its own row/value.
    - **Terminal Summary** — Raincheck count added.
    - **Playing History (Customer Profile popup)** — Check-in Status column now shows *Raincheck* and *No-Show*; a No-Show box at the top shows the No-Show count and Raincheck is also reflected.
    - **Rounds Played / Round Breakdown Report** — Reports now show separate columns for *Rounds Played*, *No-Show*, and *Raincheck*.
    - **Round Breakdown / Round Played (POS)** — RDL files and SSRS reports updated in the POS build to include Raincheck counts.



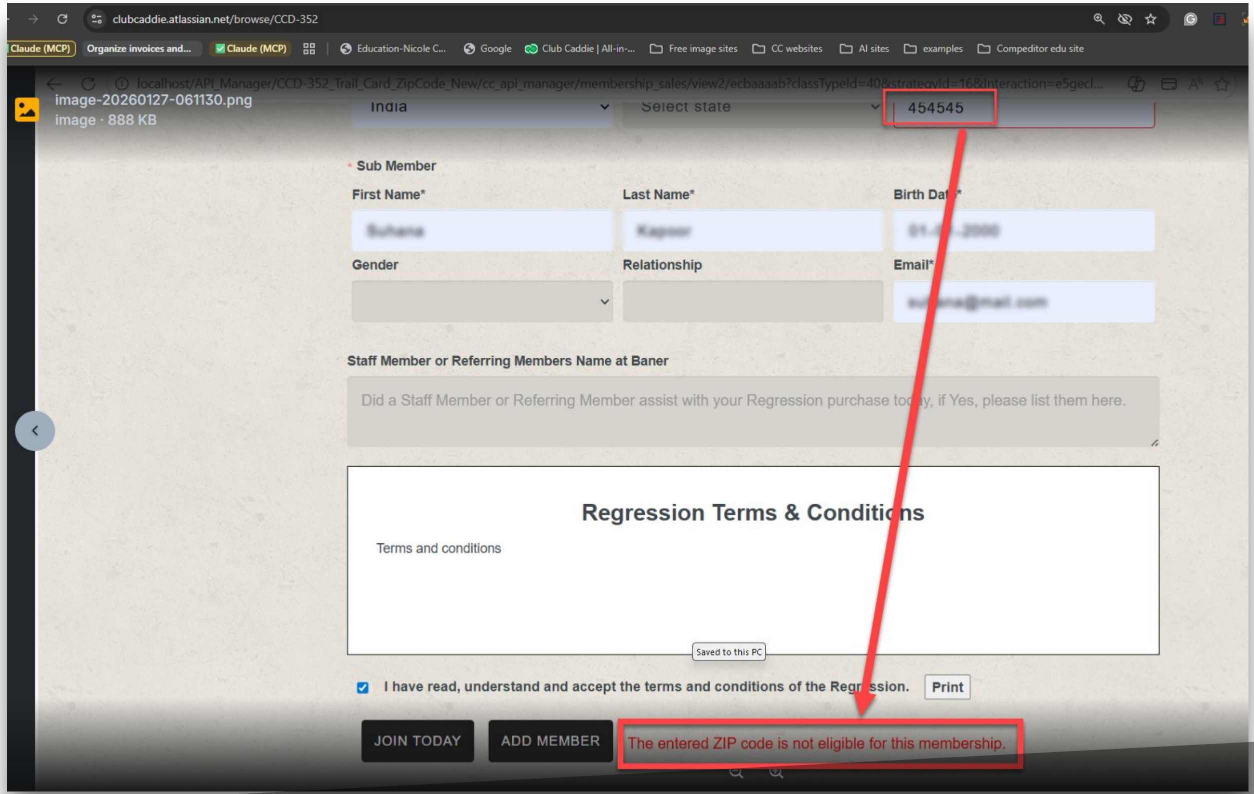
For a detailed guide, visit our [Knowledge Base Article.]()

ZIP CODE VALIDATION FOR SALES

Navigation Steps: Membership Class → Action → Additional Settings → ZIP Code field

Feature Explanation: You can now define a list of approved ZIP codes for any Membership Class. Online purchases are validated against this list.

- Customers with a non-approved ZIP code are blocked from completing the purchase online.
- ZIP codes must be entered manually as a comma-separated list (e.g., 36532,36542,36561).
- Applies to online sales only — staff selling through the Register are not restricted.



Good to Know:

- The entry field is compact — prepare your ZIP code list in advance and paste it in.
- Currently only supports an "include" list. An "exclude" option is noted as a future enhancement.

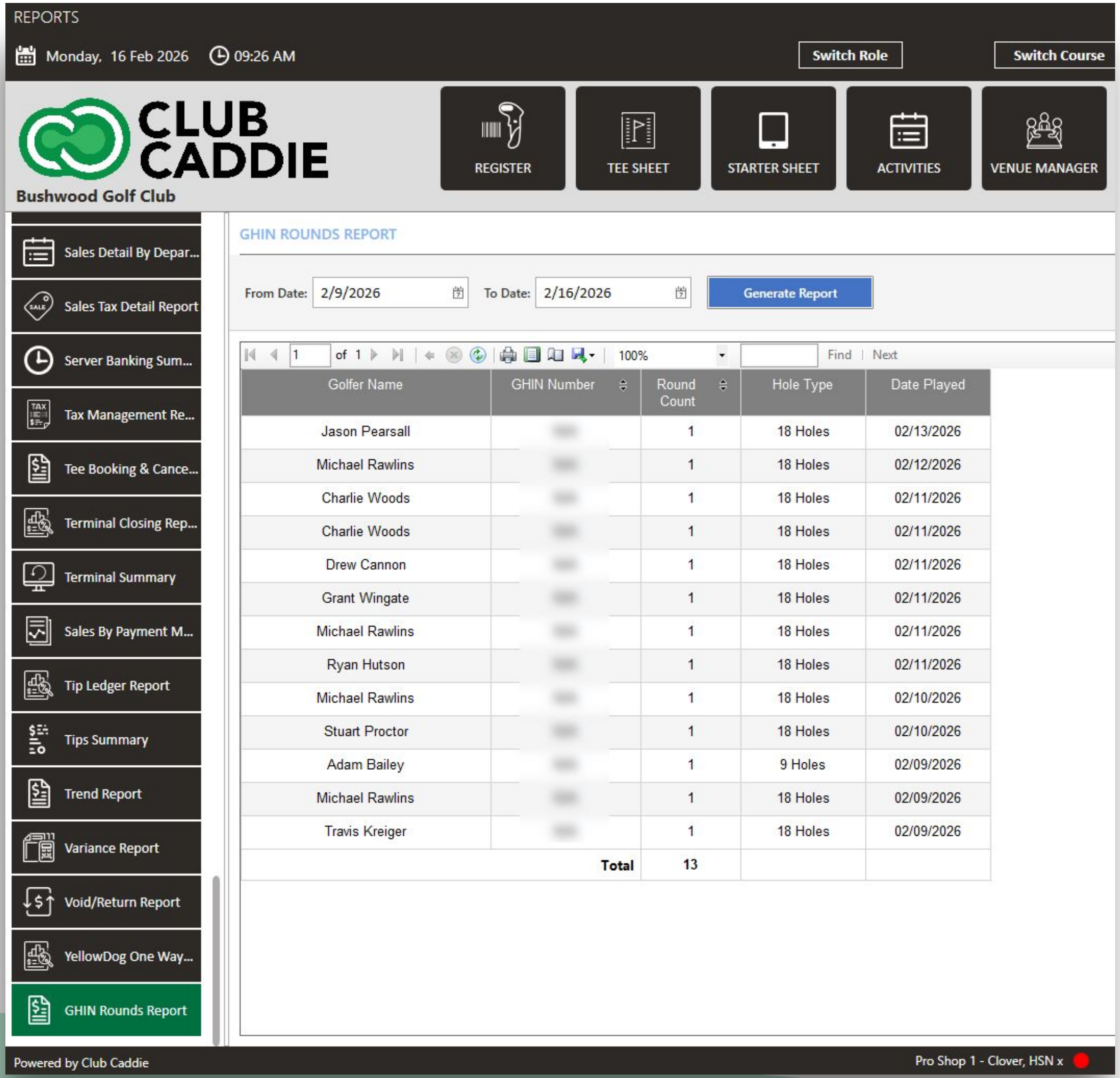
For a detailed guide, visit our [Knowledge Base Article.]

NEW GHIN ROUNDS REPORT

Navigation Steps: Settings → Manage Roles → Toggle GHIN Rounds Report On → Reports section

Feature Explanation: A new dedicated report includes GHIN information alongside standard rounds data. This is a standalone report built as its own view.

- Previously, round data and GHIN data lived in separate places, making cross-referencing difficult.
- The report is toggled off by default and must be enabled through role permissions.
- Staff will not see this report until an administrator enables it for their role.



Good to Know:

- Requires GHIN integration to be active at your facility. If GHIN is not configured, the report will not return data.

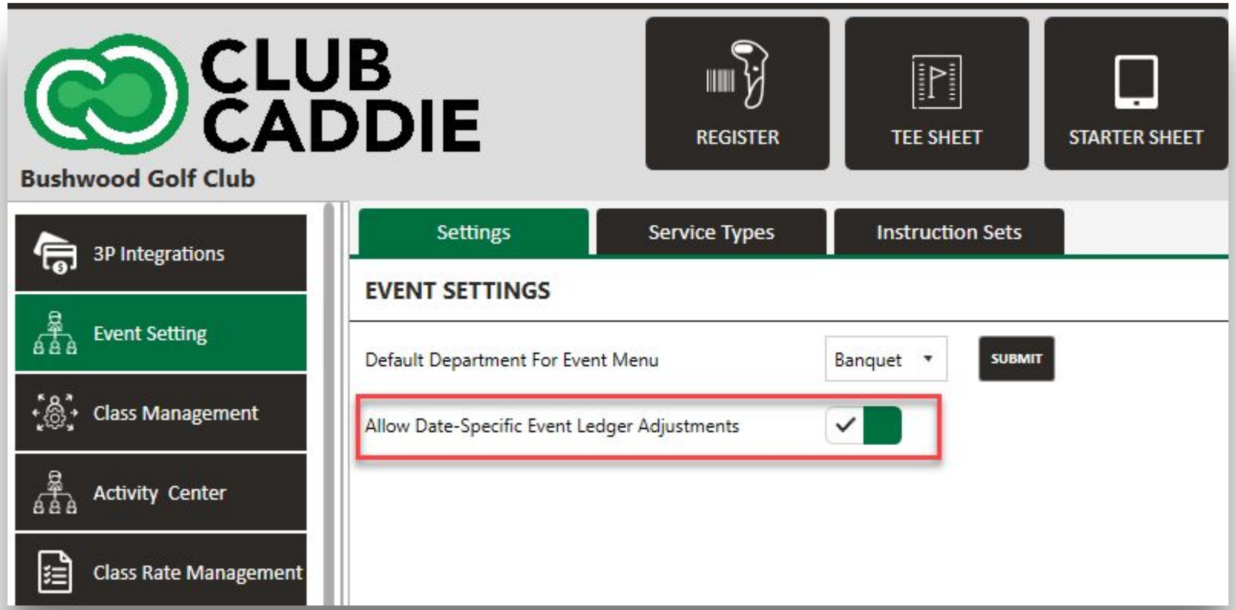
For a detailed guide, visit our [Knowledge Base Article.]

BACKDATED ADJUSTMENTS FOR EVENTS

Navigation Steps: Settings → Event Settings → Settings → Toggle on Backdated Adjustments

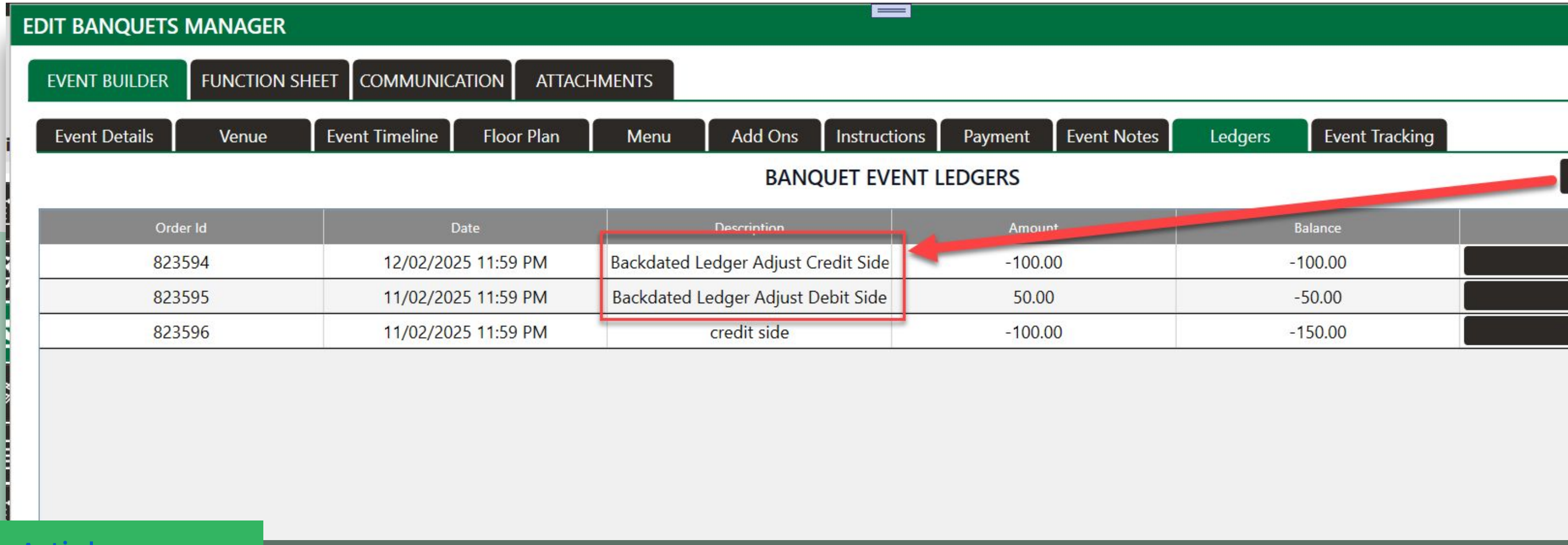
Feature Explanation: When making an adjustment in the Events Ledger, you can now select a custom Adjustment Date using a date calendar.

- Previously, event ledger adjustments could only be posted with the current date.
- Now you can backdate adjustments to match the actual date the charge should have been corrected.
- Once enabled, an Adjustment Date calendar appears when you select Make Adjustment.



Good to Know:

- The date calendar only appears after the setting is toggled on under Event Settings.
- Mirrors the existing backdated adjustment functionality for membership charges.



INDIVIDUAL LINKS FOR ONLINE EVENTS

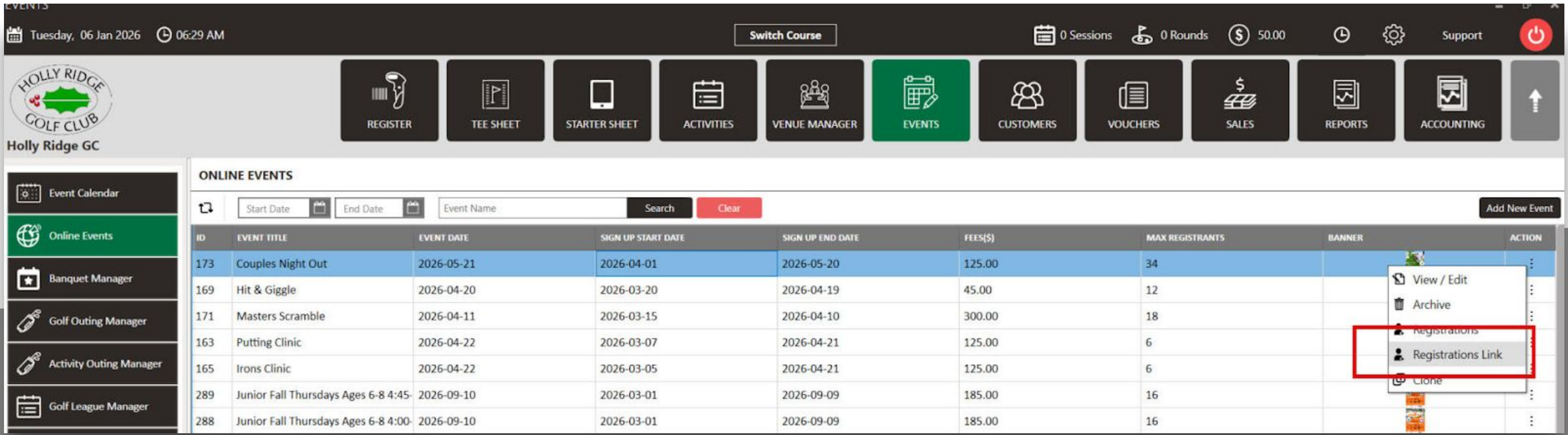
Navigation Steps: Online Events page → Locate event → Copy individual event link

Feature Explanation: Each event on your Online Events page now has its own individual link that you can copy and share directly.

- Previously, the only shareable link was for the full Online Events listing page.
- Customers now land directly on the specific event — no scrolling or searching required.
- Especially useful for social media posts where you want a direct path to registration.

Good to Know:

- The link goes to that single event only — customers won't see other events unless they navigate back.



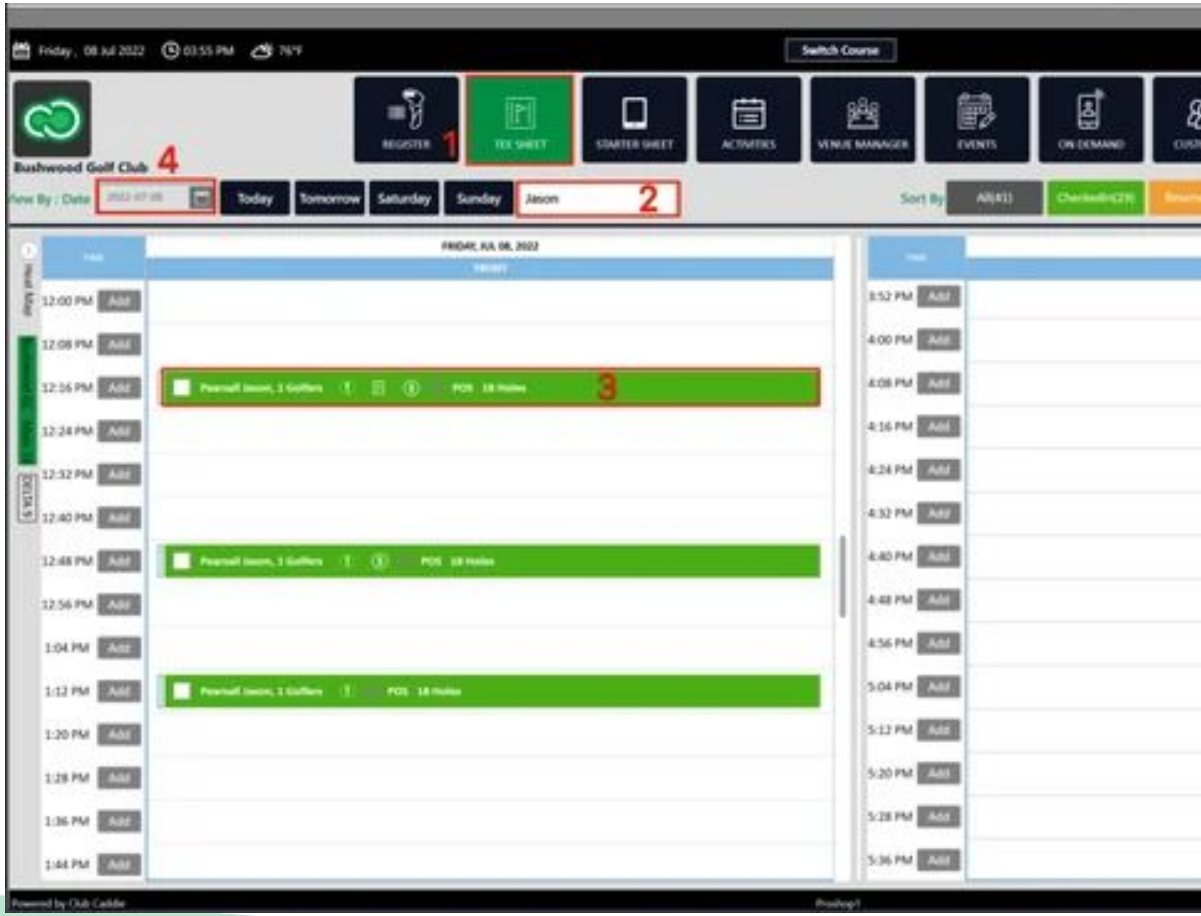
For a detailed guide, visit our Knowledge Base Article.

TEE SHEET SEARCH IMPROVEMENTS

Navigation Steps: Tee Sheet → Search field → Type "Last Name, First Name"

Feature Explanation: The Tee Sheet search now supports a "Last Name, First Name" format. The comma triggers a combined search for much faster results.

- Previously, searching by last name alone could return dozens of results at large facilities.
- Now type a comma between last and first name (e.g., "Smith, John") to filter immediately.
- The comma is the key — without it, the system treats the entire entry as a single search term.



Good to Know:

- The search is not case-sensitive.
- Most valuable at facilities with large databases where common last names return many results.

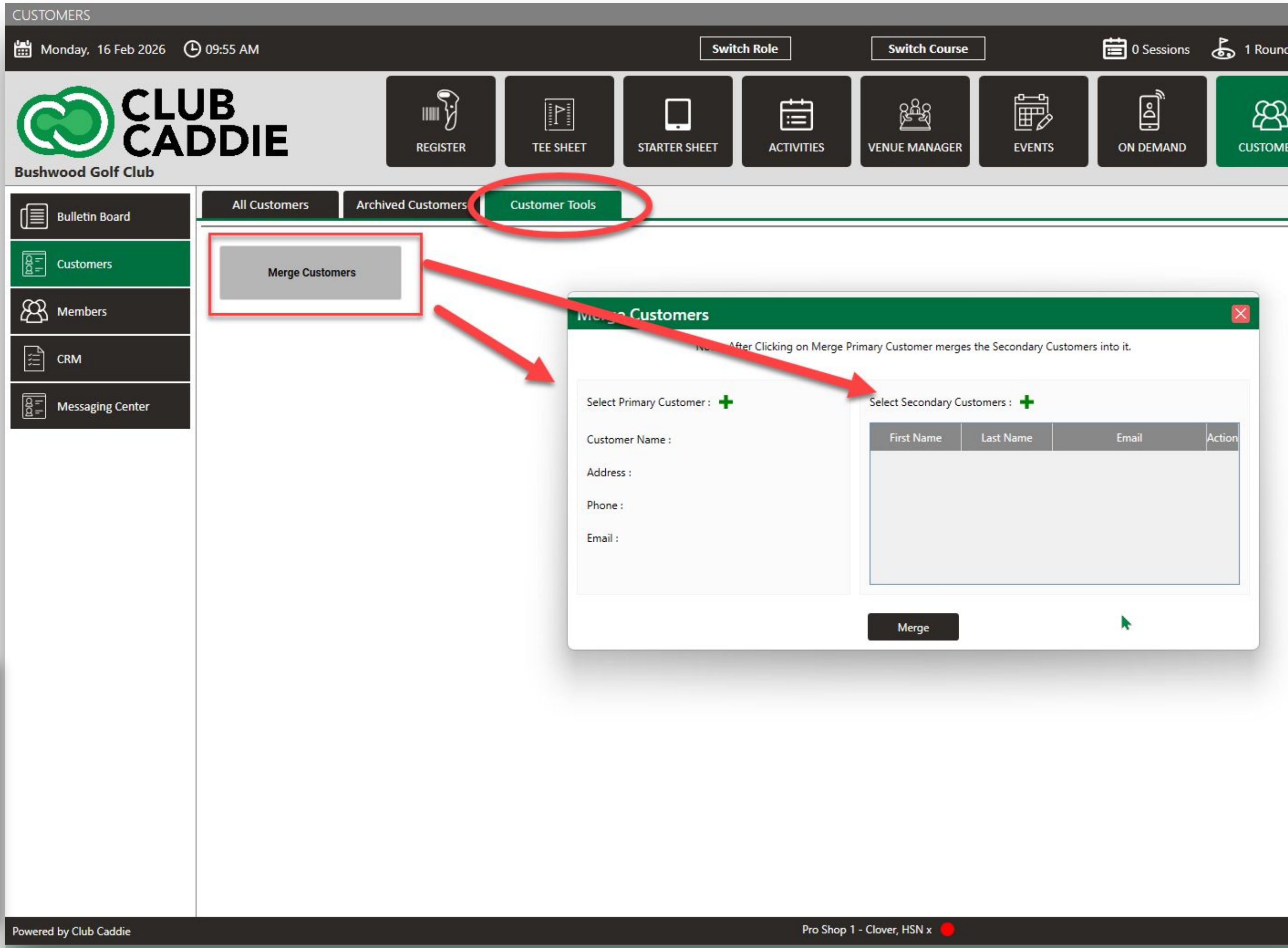
For a detailed guide, visit our [Knowledge Base Article.]

MERGING CUSTOMERS ACROSS CLUBS

Navigation Steps: Customers → Customer Tools Tab → Merge Customers □ Select secondary profile (any Origin Club)

Feature Explanation: You can now merge two customer profiles even when they have different Origin Clubs. The primary customer's Origin Club is retained.

- MCOs sometimes had duplicate profiles from different clubs that could not be merged.
- All playing history and purchase history from the secondary profile transfers to the primary.
- The secondary profile's Origin Club is not carried over.



Good to Know:

- Most relevant for MCO environments where customers may have been entered at different locations.

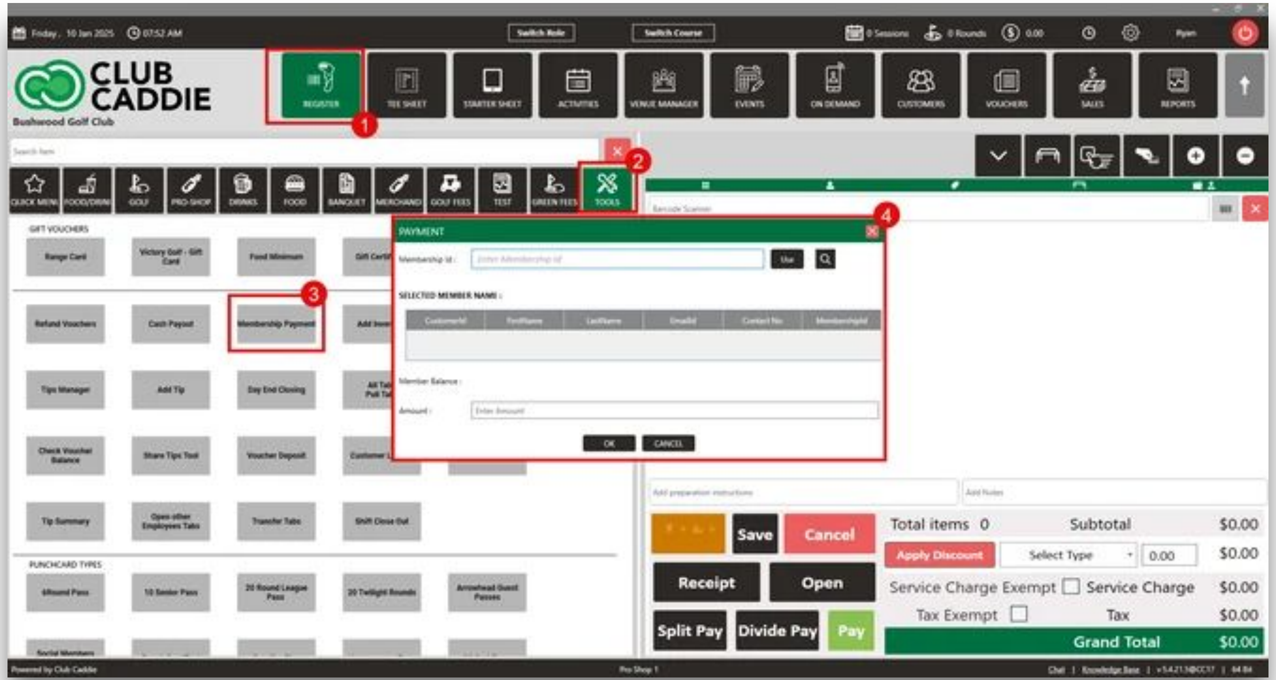
For a detailed guide, visit our [Knowledge Base Article.]

MEMBERSHIP PAYMENTS IN REGISTER

Navigation Steps: Open Register Tab ⟶ Tools ⟶ Membership Payment (adds to existing tab)

Feature Explanation: When a Register tab is already open, initiating a Membership Payment from Tools now adds it to the existing tab instead of creating a new one.

- Previously, this created a separate new tab, requiring staff to process two tabs or merge them.
- Now everything stays in a single transaction — perfect for check-in workflows.
- If no tab exists, the membership payment still creates a new tab as before.



Good to Know:

- Does not change how payment splitting works — you can still split the tab.
- Especially useful when handling tee time arrivals and membership transactions simultaneously.

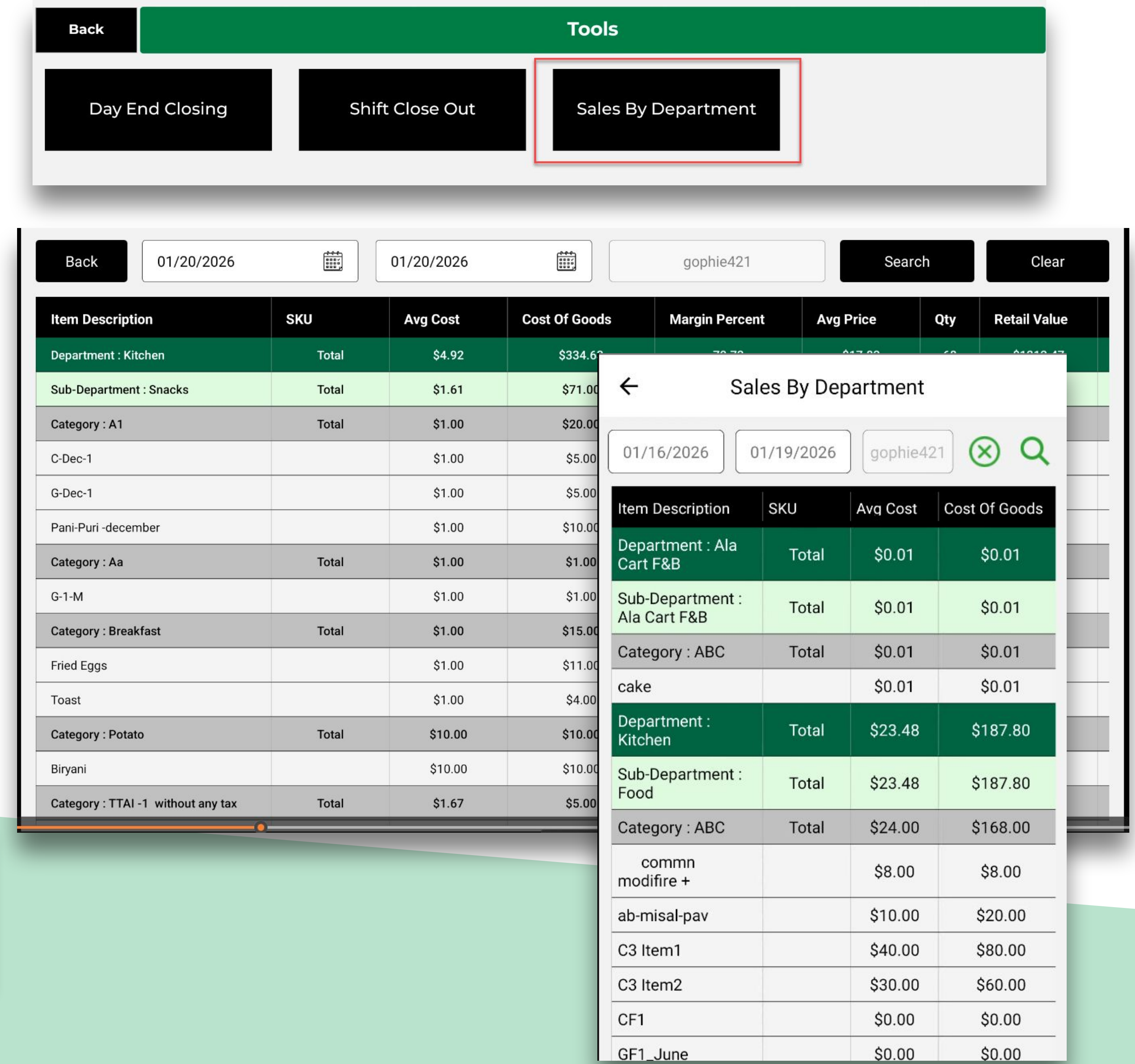
For a detailed guide, visit our [Knowledge Base Article.]

SALES BY EMPLOYEE REPORT

Navigation Steps: F&B App → Sales by Employee Report (auto-filtered to logged-in employee)

Feature Explanation: A new Sales by Employee report is now available in the F&B App, showing sales data filtered to the currently logged-in employee by department.

- Primary use case: beverage cart operators restocking — managers can compare sales against re-ordered product.
- Helps validate inventory accuracy and catch discrepancies from giveaways or unrecorded sales.
- Available on both tablet/desktop and the Clover Flex device.



Good to Know:

- Sales are displayed as gross figures. Tips do not appear to be broken out separately.

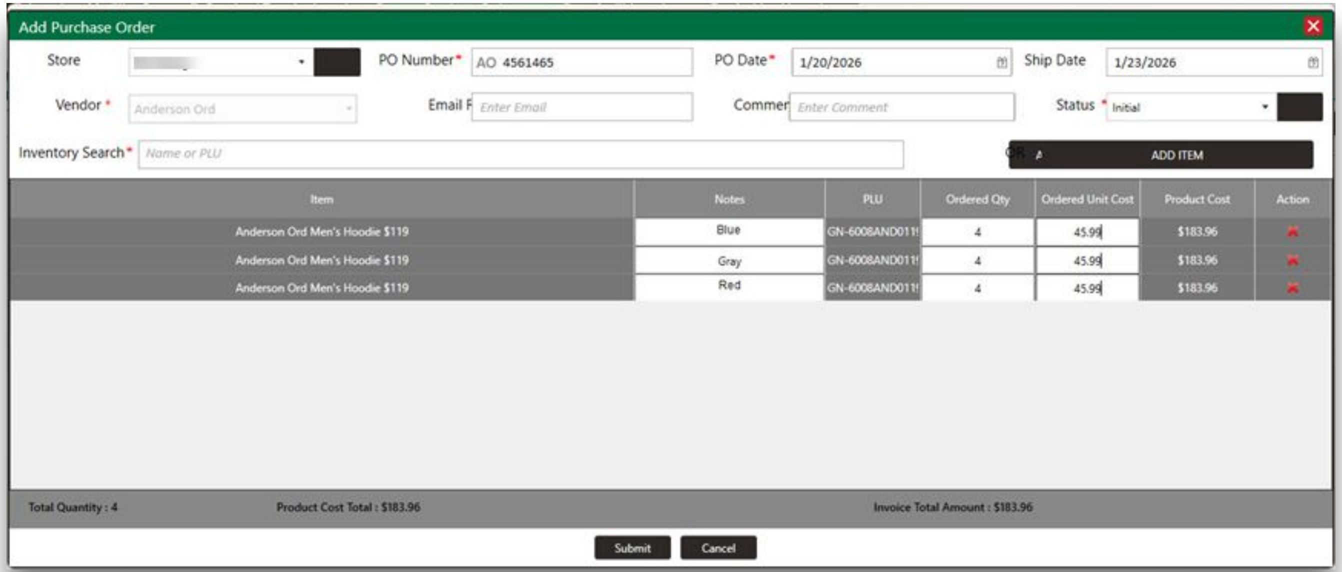
For a detailed guide, visit our [Knowledge Base Article.]()

PO MODULE – MULTIPLE SAME ITEMS

Navigation Steps: Purchase Orders → Create New PO → Add same item on multiple lines

Feature Explanation: When creating a new Purchase Order, you can now add multiple lines of the same item. Each line can have its own quantity and variation details (e.g., color, size).

- Previously, the PO module only allowed one line per item — no way to specify quantities per colorway.
- Now you can add the same inventory item multiple times with different notes or variation details.
- Gives a much more accurate picture of what you're ordering and receiving.



Good to Know:

- You must have Vendors set up in the system before you can use the PO module.
- The entry field is compact for large variation lists — prepare details in advance.

For a detailed guide, visit our [Knowledge Base Article.]