NEW FEATURES

5.4.41

A training walkthrough for operators, managers, and staff

WHAT'S INSIDE

Release 5.4.41

TEE SHEET *10 updates*

PIN audit trail, cross-course moves, smart date helpers, and online booking flexibility.

REGISTER *11 updates*

Price overrides, smarter receipts, shift close-outs, auto-send kitchen tickets.

CUSTOMERS & MEMBERS *4 updates*

Better ledger controls, advance billing fixes, Member Since at a glance.

SETTINGS *4 updates*

Pricing schedules by department, modifier sorting, cleaner labels.

REPORTS *4 updates*

Membership ID everywhere, Class Rate Name on rounds, faster saves.

TEE SHEET

Tighter audit controls, faster course-to-course moves, and smarter booking rules.

10 updates in this section

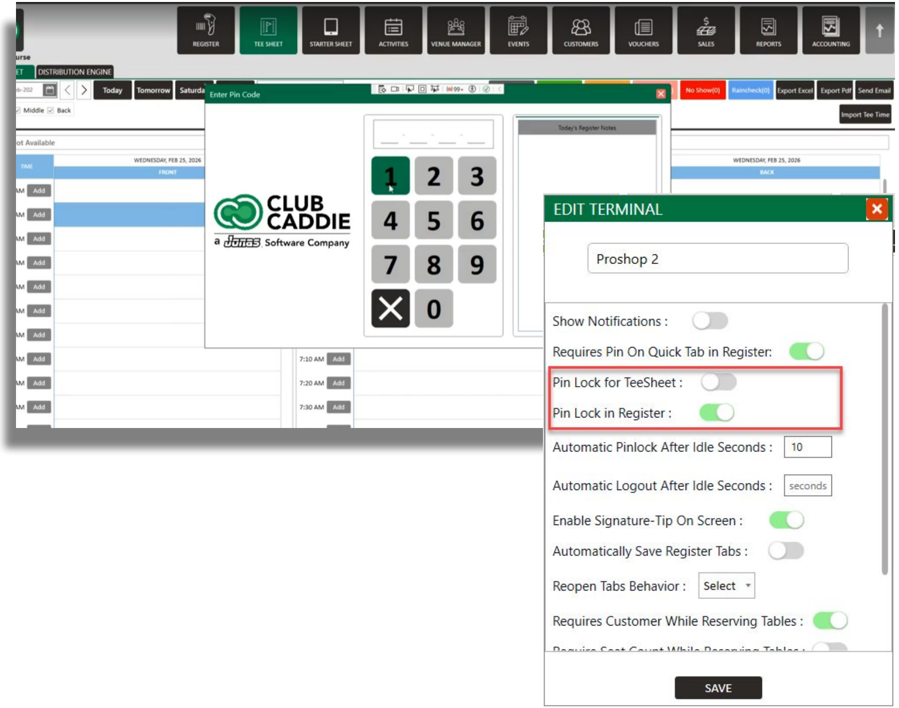
EMPLOYEE PIN LOCK ON TEE SHEET ACTIONS

Navigation Steps: Settings → Terminal Management → Edit → Pin Lock for Tee Sheet & Pin Lock for Register

Feature Explanation: Tee Sheet actions now prompt for an Employee PIN when the terminal setting is enabled. This will pop up from the action of selecting a tee time. Every PIN-gated action is written to the Tee Sheet Changelog with the employee's name — so you have a clear audit trail.

- Applies to Tee Times, Blocks, Events, Group Reservations, and Shotguns.
- Action + employee name + timestamp captured in the Changelog every time.
- Enable it when you want accountability on shared front-desk logins.

TIP: Turn this on ahead of busy seasons — it's the fastest way to spot whose hand was last on a tee time when a member calls in with a question.



CUT, COPY & PASTE TEE TIMES

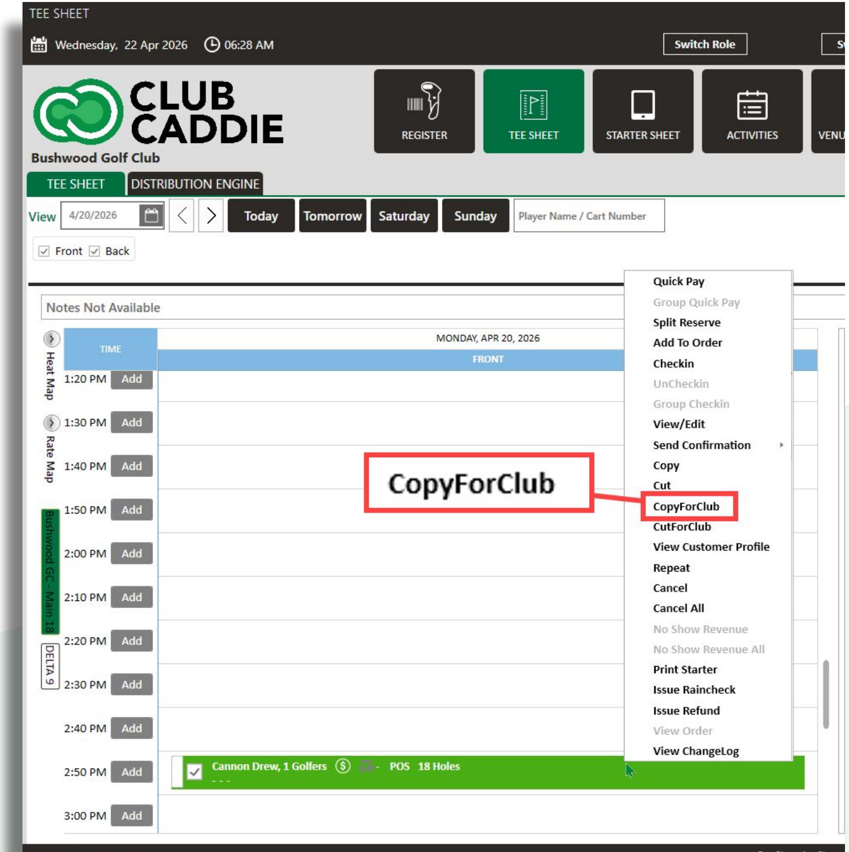
Navigation: Tee Sheet → right-click tee time → Cutforclub or Copyforclub → paste on destination course

Feature Explanation:

Staff can now cut or copy a tee time from one course in a multi-course operation and paste it onto another course. The Booking popup opens automatically to confirm or adjust rates — no more canceling and rebooking.

- Keeps customer's details intact as the reservation moves.
- Rate confirmation step prevents accidental price mismatches.
- Only available at multi-course operations.

TIP: When a group is bumped, copy the tee time to the backup course instead of rebuilding it — the customer record and notes travel with it.



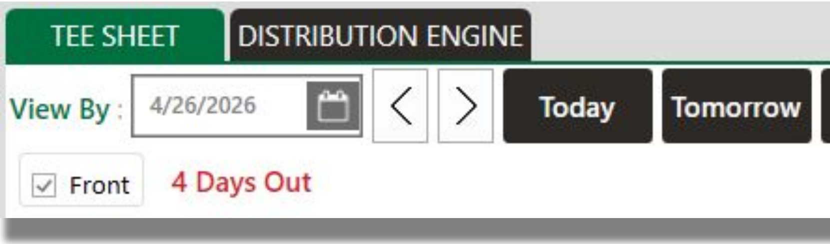
SMART DATE HIGHLIGHTING & DAYS OUT

Navigation Steps: Tee Sheet

Feature Explanation: The Tee Sheet date selector now highlights the Today, Tomorrow, Saturday, and Sunday shortcut buttons when you're viewing those dates. This helps visually to know if booking window needs to be considered for reservations called in.

When you jump ahead to a future date, a **Days Out indicator** shows how far in advance you're booking.

- Highlighted buttons for Today, Tomorrow, Saturday, and Sunday.
- Days Out indicator shows how far ahead you've navigated.
- No setting to toggle — it's live for everyone.



TIP: Use the Days Out indicator to catch reservations that are being booked outside your policy window — a quick visual check before you take a call.

Tee Sheet

REBOOK OVER RAIN CHECKED TEE TIMES

Navigation Steps: Tee Sheet → click tee time slot → Book Tee Time

Feature Explanation: Slots with a Rain Checked tee time are now open for new bookings. Rain Checks are hidden by default and only appear when applying the filter, keeping your sheet clean without losing the original record.

- Rebook rained-out slots directly—no workaround needed.
- Rain Checks are hidden by default, visible only when filtered (similar to canceled times filter)
- The original record is preserved for reporting and lookups.

Before Raincheck is issued

After Raincheck is issued

Still Reflects in Reporting

ROUND BREAKDOWN REPORT

Course: All | Report Type: Average Daily Rounds by Source | Tee Date: Day | Week | Month | Year | 4/16/2026 | 4/22/2026 | Search

1 of 1 | 100% | Find | Next

Tee Date	Order Date	Course Name	Source	Rounds Played	Total Amount	Average Daily Rate	No Show	Raincheck
04/16/2026	04/16/2026	Bushwood GC - Main 18	POS	0	$0.00	$0.00	5	0
04/17/2026	04/17/2026	Bushwood GC - Main 18	POS	0	$0.00	$0.00	1	0
04/20/2026	04/20/2026	Bushwood GC - Main 18	POS	3	$210.38	$70.13	23	0
04/21/2026	04/21/2026	Bushwood GC - Main 18	POS	18	$1,891.80	$105.10	6	0
04/22/2026	04/22/2026	Bushwood GC - Main 18	POS	1	$105.10	$105.10	4	2
			Total	22	$2207.28	$100.33	39	2

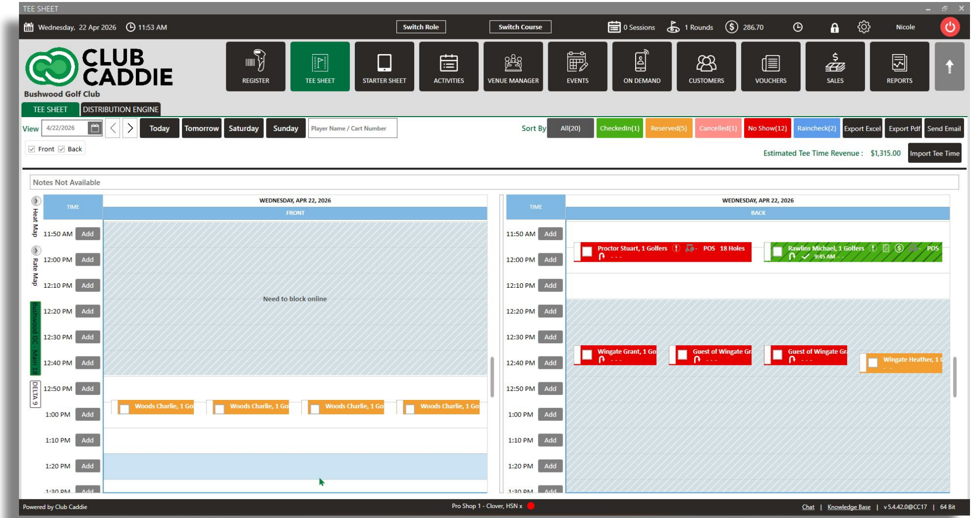
TIP: After a weather event, turn on the Rain Check filter during reconciliation — you'll see exactly which slots were originally rained out and can audit the refund or rebook history quickly.

TURN TIMES BOOKABLE DURING BLOCKS

CLUB CADDIE
a Jonas Software Company

Navigation Steps: Tee Sheet → click tee time slot → Book Tee Time

Feature Explanation: Turn times (back-nine starts) can now be booked online even when a No Online Booking block is active. The block now only restricts starting resources, not turn times. This lets facilities control when full 18-hole online bookings are available while still allowing online 9-hole play during blocked periods.



TIP: Members who toggle between the Member Portal and your public Tee Time I-Frame will now see the same booking look and feel either way — fewer support questions about "why is this different here?"

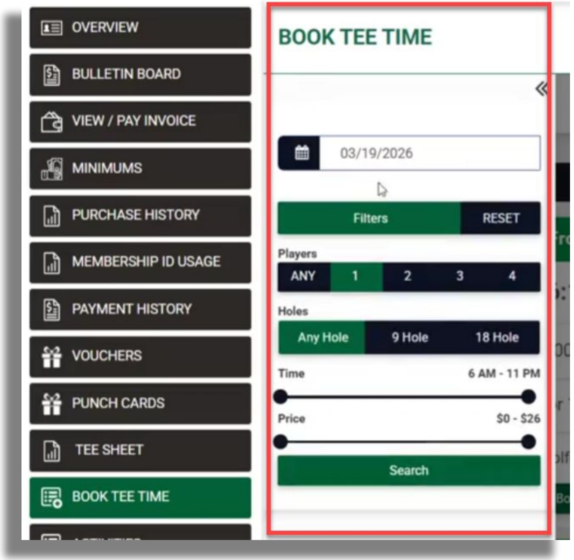
Tee Sheet

MEMBER PORTAL MATCHES TEE TIME I-FRAME

Navigation Steps: Member Portal → Book Tee Time

Feature Explanation: The Member Portal booking experience now shares the same date selector and policy layout as the standard Tee Time I-Frame — a consistent look for members no matter which booking path they use.

- Date selector now matches the Tee Time I-Frame layout.
- Policy display now aligned with the standard booking view.
- Consistent experience across Member Portal and I-Frame.



TIP: Members who toggle between the Member Portal and your public Tee Time I-Frame will now see the same booking look and feel either way — fewer support questions about "why is this different here?"

REGISTER

Sharper point-of-sale controls, receipts that tell the full story, and kitchen improvements.

11 updates in this section

PRICE OVERRIDES ON INVENTORY ITEMS

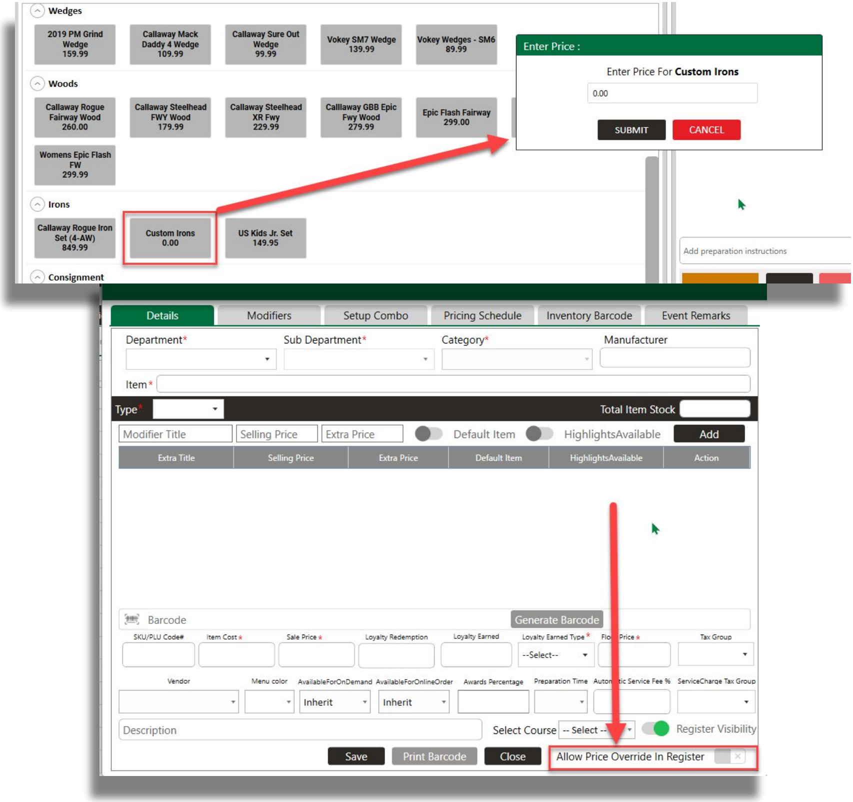
CLUB CADDIE
a Jonas Software Company

Navigation Steps: Settings → Inventory Center → Edit OR from the Register → Right Click → Edit inventory → Toggle on Allow Price Override in Register

Feature Explanation: A new price override option for inventory items lets staff key in the unit price at the register instead of applying a discount. It's designed for items where the price itself is variable — special orders, open food, villa stays — acting as an open price key. When enabled on an item, a pop-up appears at the register to enter the price before the item is added to the tab. Because the entered value is recorded as unit cost (not a discount), revenue post correctly in accounting.

- Set the unit price at the register — no discount workaround
- Best for special orders, open food, and villa pricing
- Enabled per item in Inventory Center; pop-up prompts for price at ring-up
- Accounting posts correctly because the override sets unit cost, not a discount line

TIP: Great fit for rental clubs, damaged-goods sales, or custom-packaged gift sets — turn the override on for those items and leave it off for tightly controlled categories like apparel.



OPEN-TAB RESTRICTION EXTENDED TO SHIFT CLOSE-OUTS

Navigation Steps: Settings → Register Settings

Feature Explanation: The Restrict Employee Clock Out with Open Tabs setting now covers shift close-outs as well. Every transaction must be settled before a shift can end.

- Blocks both clock-outs and shift close-outs until tabs are settled.
- The label is updated to "Restrict Employee Clock/Shift Close Outs with Open Tabs".
- Ideal for F&B teams where open tabs often roll across dayparts.

TIP: Pair this with a mid-shift tab review on your POS dashboard so servers can proactively chase open tabs before the restriction blocks them at close.

Register

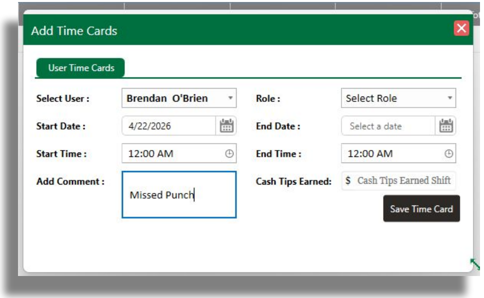
MANAGER MANUAL CLOCK-IN FOR MISSED PUNCHES

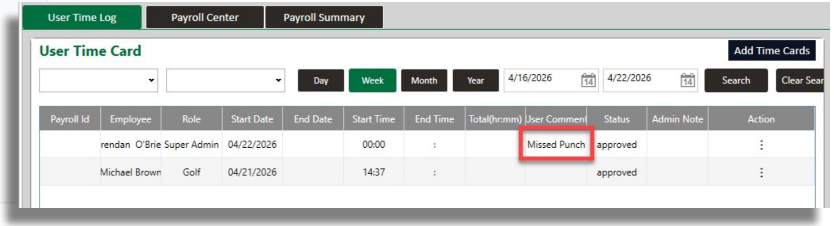
CLUB CADDIE
a Jonas Software Company

Navigation Steps: Payroll Center → User Time Log → Add Time Cards

Feature Explanation: Managers with the Manager Override permission can now add a clock-in time for an employee who forgot to punch in, without needing a clock-out on record first.

- No more waiting for the missing clock-out before fixing the missed clock-in.
- Gated by role permissions to keep access limited to authorized managers.
- Works alongside the existing Add Timecard workflow.





TIP: Build a quick Friday habit — review missed punches from the week before payroll runs, then fix them with this flow instead of waiting on employees to come back and correct their own cards.

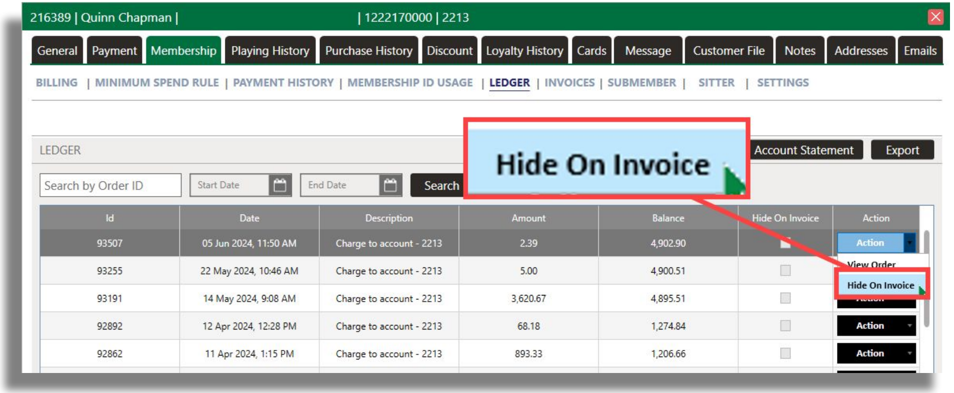
HIDE VOIDED LEDGER TRANSACTIONS FROM MEMBER VIEW

a Jonas Software Company

Navigation Steps: Customers → select customer → Ledger tab → Action → Hide on Invoice

Feature Explanation: Staff can now hide paid ledger transactions voided in error from member-facing views (invoices, member portal, mobile app) while internal accounting records stay fully intact.

- Internal financial record preserved for audit.
- Member sees a clean invoice without phantom charges.
- Applies to same-month voids before billing runs.



TIP: Use this instead of asking accounting to hand-edit statements — the underlying record stays auditable, and the member experience stays clean.

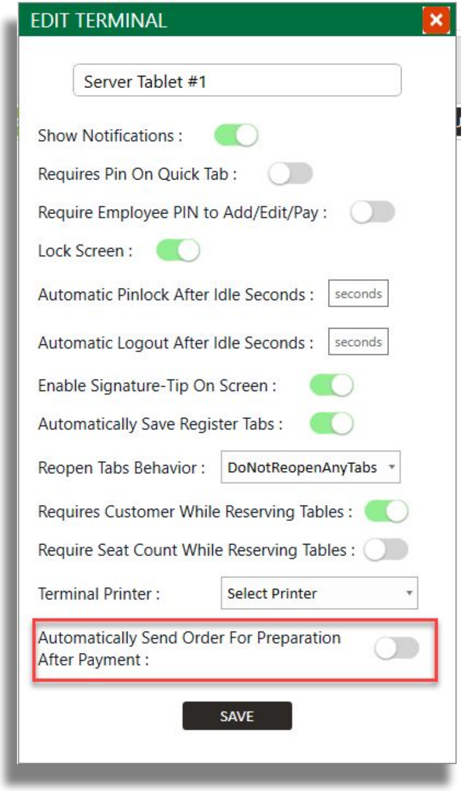
AUTO-SEND ORDER PREPS AFTER PAYMENT

Navigation Steps: Settings → Terminal Management → Edit → Toggle on "Automatically Send Order for Prep….."

Feature Explanation: Order preparations can now be sent to the kitchen or bar automatically the moment a payment is processed, removing the need for staff to manually trigger the send. It's configurable per terminal.

- Kitchen and bar tickets fire the moment payment lands.
- Per-terminal setting — mix and match across the floor.
- No extra training needed; no hidden button to remember.

TIP: Turn this on for busy bar terminals where drinks move faster than tickets — leave it off on full-service dining terminals where servers want to review the order before firing.



RECEIPTS THAT TELL A BETTER STORY

Navigation Steps: Register / Settings → Register Settings

Feature Explanation: Three receipt improvements land together in this release. Staff and customers get the full context of every transaction — which course, which account, and where loyalty stands.

COURSE NAME & ROTATION

Confirmation emails, printed receipts, starter receipts, and Sales module receipt views now include the Course Name and Rotation Schedule — a big help at multi-course facilities.

LOYALTY BALANCE & POINTS

When loyalty is involved, receipts show both the current Loyalty Balance and the points earned on that transaction, so customers always know where they stand.

MEMBER NUMBER AT TOP

When a member is tied to a transaction, the Member Number prints at the top of the receipt — staff and members can identify the account at a glance.

KITCHEN & CLOUD PRINT IMPROVEMENTS

Navigation Steps: Settings → Register Settings → Terminal Management

Feature Explanation: Print refinements that make tickets and receipts easier to read and more aligned with your settings.

BIGGER MODIFIER FONT

Font sizes for modifiers and special instructions on Cloud Kitchen printed receipts have been increased, so kitchen and bar staff spot prep notes at a glance.

DISPLAY REFINEMENTS

Several display and layout improvements make Cloud Print receipts and kitchen tickets easier to read on the line.

ADDITIONAL REGISTER IMPROVEMENTS

Quality-of-life fixes that keep day-to-day payments and invoices running smoothly.

RANGE EXPRESS PIN FIX

The 'Failed to regenerate Range Express pin' error has been resolved. PINs now generate reliably for Range Express payments.

Nav: *Register*

USE READER PROMPT FIX FOR LANE 3000

The Use Reader button on the Payment tab now correctly prompts a Lane 3000 card reader for swipe, tap, or insert — no more manual entry workaround.

Nav: *Customers → select customer → Payment tab*

DOWNLOADED INVOICE TOTALS CORRECTED

A calculation error that caused downloaded invoice PDFs to show the wrong line-item totals has been resolved. PDF and in-app totals now match.

Nav: *Register — re-download any affected invoices*

CUSTOMERS & MEMBERS

Better ledger controls, more accurate advance billing, and cleaner member profiles.

4 UPDATES IN THIS SECTION

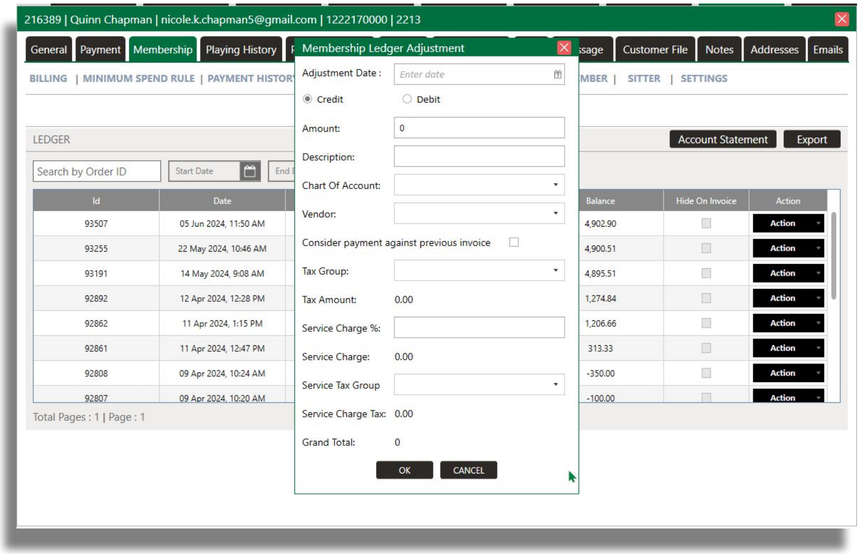
ONE-STEP BACKDATED LEDGER ADJUSTMENTS

Navigation Steps: Customers → select customer → Ledger tab

FEATURE EXPLANATION

Member ledger adjustments can now be backdated to a specific date and posted as a single transaction covering the sale amount, service charge, and tax together.

- One adjustment covers sale + service charge + tax.
- Choose the exact posting date you need for the adjustment.
- Cleaner ledger history and a simpler audit trail.



TIP: This is a lifesaver during month-end reconciliation — pair it with the Allow Date-Specific Ledger Adjustments setting in Membership Settings.

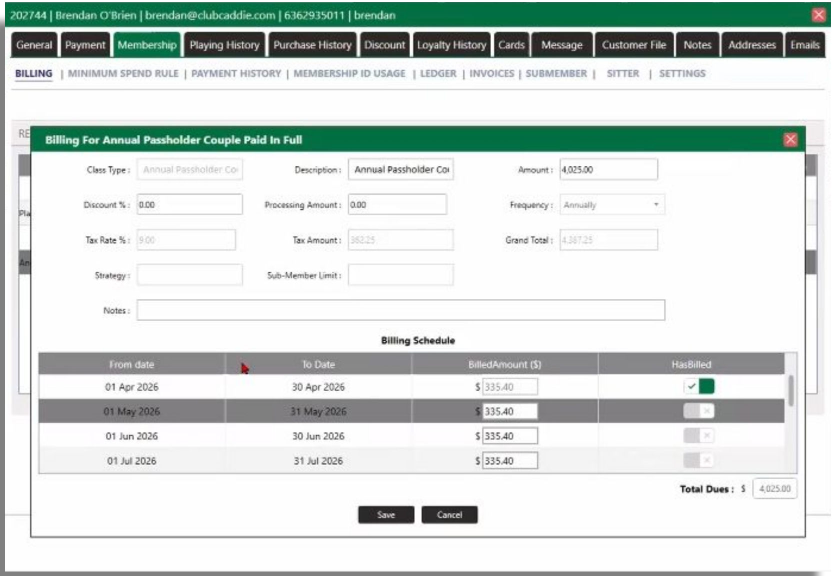
ADVANCE BILLING SCHEDULE IMPROVEMENTS

Navigation Steps: Customers → select customer → Membership Tab → Billing → Action → View/Edit Billing=

FEATURE EXPLANATION

Advance billing schedules now has cleaner UI with more functionality. Toggle months that have been billed.

- Schedules generate from the month of the effective date.
- Charges on the configured billing day — not always the 1st.
- Class changes carry into future cycles automatically.
- Mid-cycle edits stop billing members after expiry.



TIP: If you onboarded advance billing members earlier this year, spot-check a few profiles after this release — the corrected behavior applies going forward and gives you a cleaner baseline.

ADDITIONAL CUSTOMER IMPROVEMENTS

CLUB CADDIE
a Jonas Software Company

Profile-level refinements that save staff a click and improve on-screen clarity.

MEMBER SINCE DATE ON THE GENERAL TAB

A Member Since date now displays right next to the photo on a member's General Info tab, so staff can confirm tenure at a glance without digging into billing history.

Nav: *Customers → select customer → General tab*

ACTIVE MEMBER STATUS INDICATOR CORRECTED

Active member accounts now display the correct green status indicator. Previously, some active members were showing red, which caused confusion about whether the membership was valid.

Nav: *Customers*

TIP: Streamlining these small interface details significantly reduces daily friction for your staff members and improves member data accuracy.

SETTINGS

More control over pricing schedules, modifiers, and integration behavior.

4 UPDATES IN THIS SECTION

PRICING SCHEDULES: DEPT, SUB-DEPT, OR CATEGORY

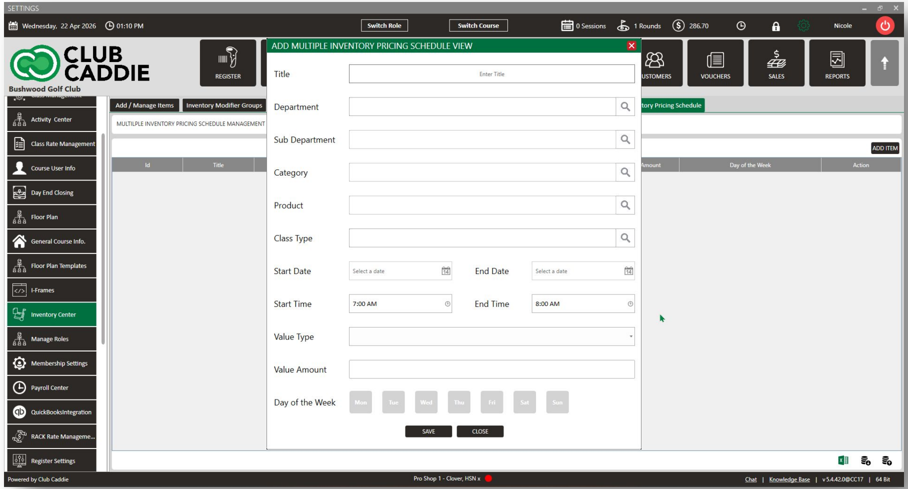
Navigation Steps: Settings → Inventory Center → Multiple Inventory Pricing Schedule Tab → Add or Edit item

FEATURE EXPLANATION

Pricing Schedules can now be applied at broader levels — not just per item. Run happy hour or time-based promotions without manual per-item edits.

- Scope schedules to Dept, Sub-Dept, or Category.
- Per-item schedules still work for one-off cases.
- Great for recurring F&B and seasonal pricing.

Value type will dictate the value amount… so select first then add amount.



TIP: Build a Bourbon Happy Hour schedule at the Sub-Department level once, and it applies to every bourbon you stock — no more editing dozens of items.

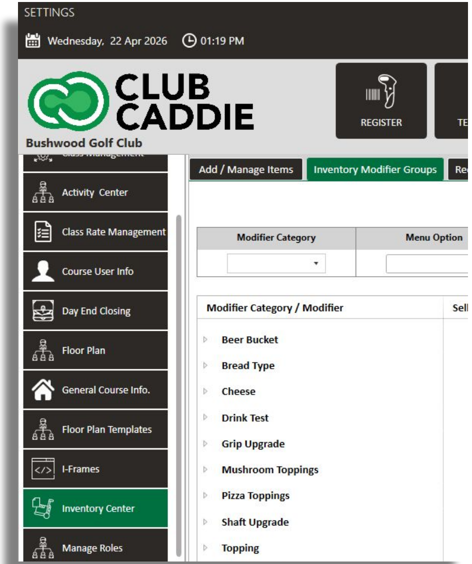
MODIFIER SORTING & CATEGORY FILTERING

Navigation Steps: Settings → Inventory Center → Inventory Modifier Groups

FEATURE EXPLANATION

The Inventory Center Modifiers section now includes filtering by Modifier Category and sequence definition within groups.

- Filter by Category to narrow lists quickly.
- Option order within groups is preserved.
- Categories sort alphabetically by default.
- Alpha is default unless there is a display sequence, then display sequence becomes the default order



TIP: Set display order intentionally for large beverage lists — the sequence you save is exactly what staff see at the POS.

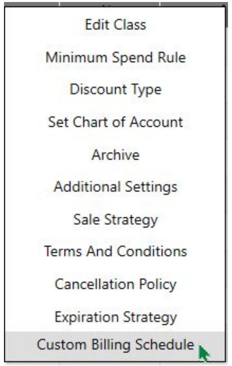
ADDITIONAL SETTINGS IMPROVEMENTS

Small refinements that reduce friction during setup and day-to-day navigation.

CUSTOM SCHEDULE RENAMED TO CUSTOM BILLING SCHEDULE

The member-level advance billing option has a clearer label that distinguishes it from class-level billing settings. Functionality is unchanged.

Nav: *Settings → Class Management → Action → Advanced Billing now Custom Billing Schedule*



REPORTS

Better member data in reports, new fields on the Rounds Report, and a faster spend rule update.

4 updates in this section

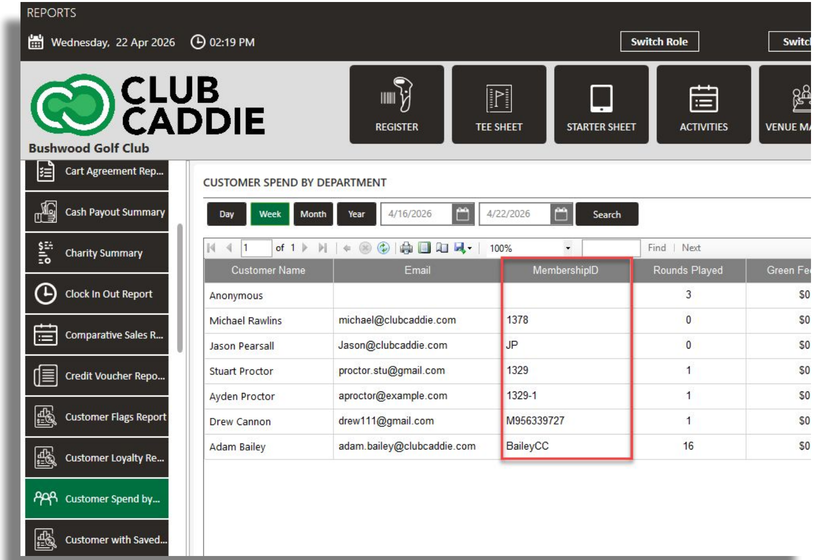
MEMBERSHIP ID ON SALES & CUSTOMER SPEND REPORTS

Reports → Sales by Item/SKU • Reports → Customer Spend by Department or Sales by Item/SKU

Feature Explanation

Two key reports now include a Membership ID column, making it easier to tie purchase data to specific member accounts.

- Membership ID added to Sales by Item/SKU.
- Membership ID added to Customer Spend by Department.
- Filter/sort in Excel to isolate member-only spend.



TIP: Update import templates to map the Membership ID column for faster member billing feeds.

ADDITIONAL REPORTS & CLASS MANAGEMENT IMPROVEMENTS

Faster saves and more context right in the report grid.

CLASS RATE NAME ON THE ROUNDS REPORT

The Rounds Report now displays the Class Rate Name alongside the Class Name for each round — no more cross-referencing separately to confirm which rate applied.

Nav: *Reports → Rounds Report*

MINIMUM SPEND RULE CHANGE RESOLVED

Applying class minimum spend rule changes immediately to all class members now saves and applies without delay. Previously would trigger when it was the next cycle.

Nav: *Settings → Class Management → select class → Action → Minimum Spend Rule*

WHAT TO DO NEXT

A quick checklist for putting 5.4.41 to work at your facility.

1 **Review the permission changes**
Confirm who needs Manager Override for missed clock-ins and Employee PIN access on the Tee Sheet.

2 **Turn on the settings you want live**
Inventory price overrides, auto-send order preps, open-tab restrictions, and receipt display options are all opt-in.

3 **Update your team**
Walk staff through the big workflow changes — especially Cut/Copy tee times across courses and the new ledger adjustment flow.

4 **Audit your billing schedules**
Spot-check advance billing members to confirm schedules generate on the correct day for the next cycle.