CLUB CADDIE

a Jonas Software Company

NEW FEATURES

5.6

Release 5.6

WHAT'S INSIDE

1	**MULTI-CLUB & MEMBERSHIPS** 7 updates	Cross-club memberships, shared wallets, per-club ledgers, central inventory
2	**TEE SHEET & BOOKINGS** 5 updates	Tee Time Holds, paid check-in clarity, smoother search, booking state restored
3	**REGISTER & RECEIPTS** 5 updates	Tax-exempt profiles, richer cloud receipts, smarter item handling
4	**REPORTS & ACCOUNTING** 4 updates	Multi-select terminals, cleaner Aging, ECOM in payment reports
5	**RATES, EVENTS & VOUCHERS** 4 updates	Year-specific rack rates, event charge returns, voucher import upgrades

MULTI-CLUB & MEMBERSHIPS

Members and staff move across clubs in your MCO without losing context.

7 updates in this section

CROSS-CLUB MEMBERSHIP

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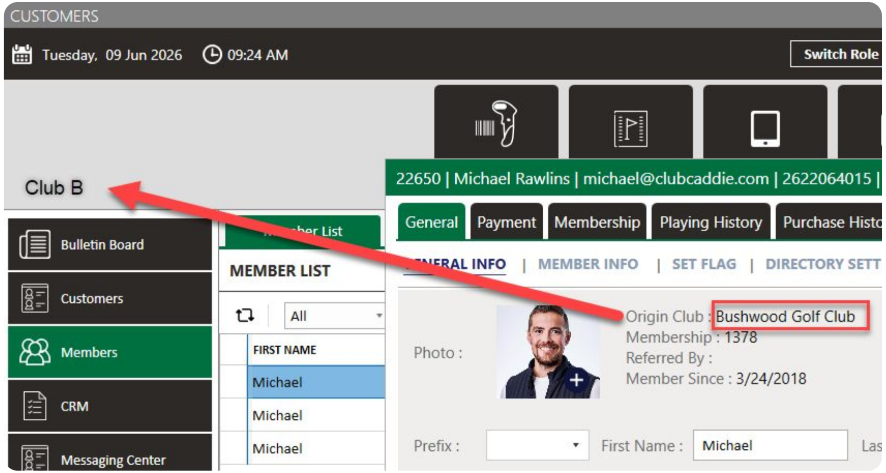
Navigation Steps: Customers → Members • any club in the MCO

Feature Explanation:

Staff at any club can now renew, assign, and manage memberships for any member — no matter which club they originally joined.



- Member's ID and active status visible at every club.
- Standing recognized for tee times, sales, and vouchers.
- Primary club membership visible with new club filter.
- New popup with tabbed view for billing, invoices, and more.

Setup:
Four MCO Portal toggles per club (gift cards, customer, member, wallets). Cross-club features apply once enabled by implementation.

TIP: No more pulling staff back to a member's home club just to process a renewal.

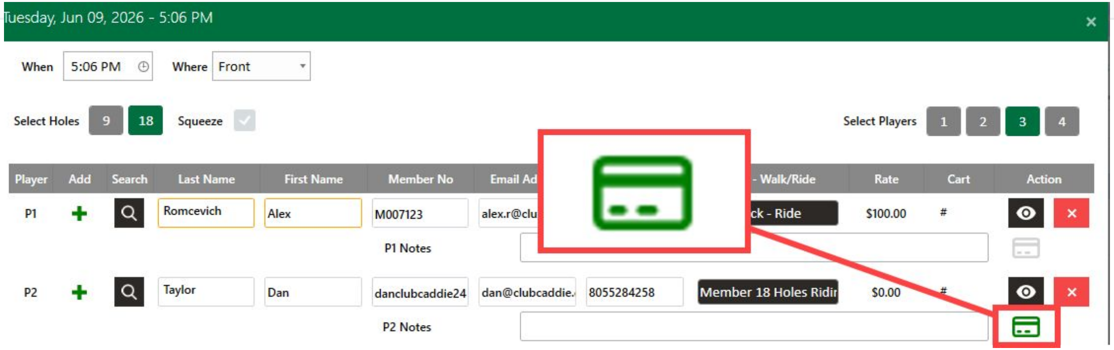
SHARED WALLETS ACROSS THE MCO

FOR: Front desk / pro shop

Navigation Steps: Customer Search · Tee Sheet · Tee-Booking & Multi-Player popups & Starter Sheet

Feature Explanation: Wallet balances are now organization-wide — a balance set up at any club is recognized at every other club.

- A wallet indicator icon appears next to a golfer's name everywhere you start a transaction.
- Staff see who has funds available before they ring anything up — no switching courses or asking.
- Each club's balance rules still apply, so operators keep full control of how funds are spent.



TIP: Look for the wallet icon by the golfer's name to confirm a balance is available.

PER-CLUB MEMBERSHIP LEDGER & INVOICES

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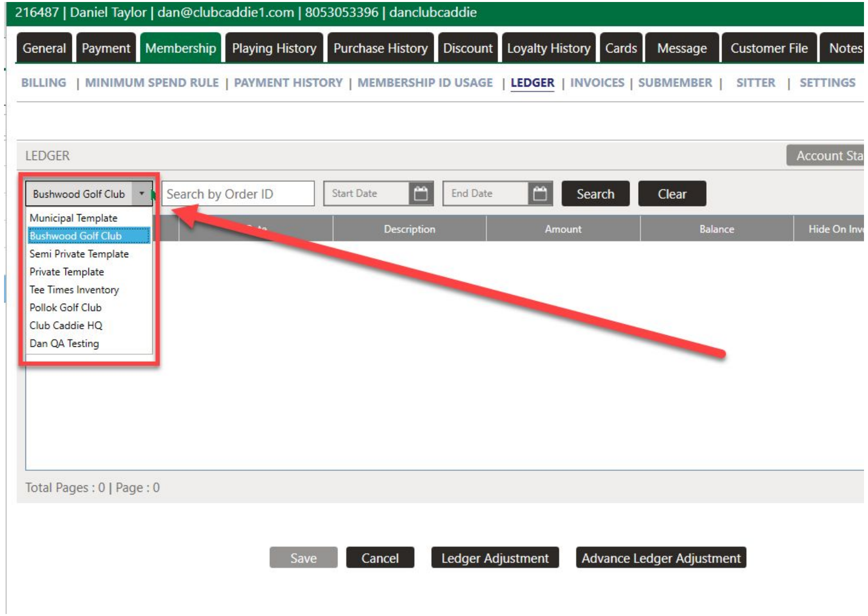
Navigation Steps: Customers → select member → Ledger / Invoices

Feature Explanation:

Ledger, invoices, adjustments, statements, and billing history are now tracked and displayed per club inside an MCO.

- Filter all financial activity by the specific club it belongs to — the filter carries through viewing, downloading, exporting, and emailing.
- Member → Customer conversions keep full history: classes, invoices, ledger, MembershipID usage, and payments stay accessible.

TIP: Use the club filter before downloading statements so each club's numbers stay clean.



FOR: Multi-club buyers / HQ inventory admin

CENTRAL INVENTORY

Navigation Steps: MCO Portal → enable 'Has Common SKUs' → HQ club → item → per-club toggle

Feature Explanation: A new Centralized SKU workflow lets an HQ buyer create an inventory item once and push it to selected clubs in a single action.

- Cloned items carry department, category, type, stock, barcode, SKU, cost, pricing, loyalty, floor price, tax group, and vendor.
- Receiving clubs can edit every field except Barcode and SKU.
- If a club's department structure doesn't match HQ, a popup lists which clubs were skipped and why.

TIP: Line up department/category structure across clubs first so fewer SKUs get skipped on the push.

Insert screenshot:

HQ item editor showing the per-club toggle list, and the 'skipped clubs' popup.

ADDITIONAL MEMBERSHIP IMPROVEMENTS

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Billing-cycle time savers and a fix that clears false suspension blocks.

PRINT ALL INVOICES AS ONE PDF

Membership Settings now prints every physical-invoice member’s invoice in one action — a single PDF instead of one file per member. For an accounting team with 500 members, it's now one print job.

Nav: Settings → Membership Settings → Bulk Export Print Invoices

SUSPENSION RESPECTS DELETED MEMBERSHIPS

A suspended-then-deleted membership no longer carries its suspension to the member's new membership, so payments and access aren't wrongly blocked.

Nav: Customers → Member

ADJUSTMENTS POST TO THE RIGHT CLUB

Adjustments now show under the club where they were processed, not the member's home club — every report reflects it accurately.

Nav: Member Ledger

TIP: These membership improvements are designed to reduce manual overhead for billing staff. Review your bulk invoice export settings to save hours during monthly billing cycles.

TEE SHEET

Tee Time Holds lands for everyone, with clearer check-in and counters.

5 updates in this section

Tee Sheet

TEE TIME HOLDS

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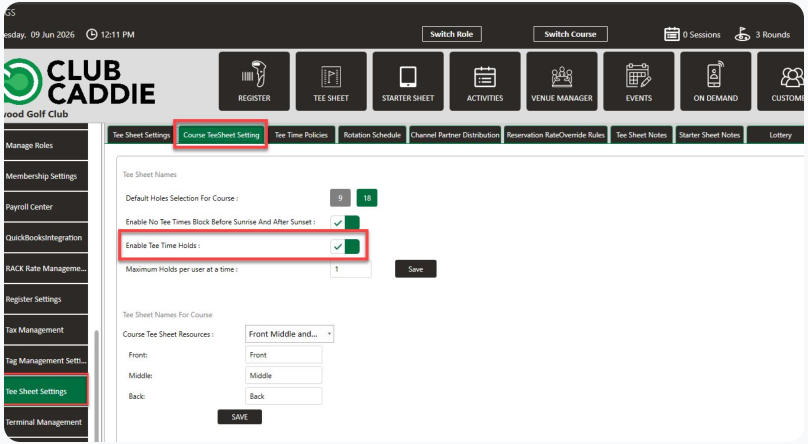
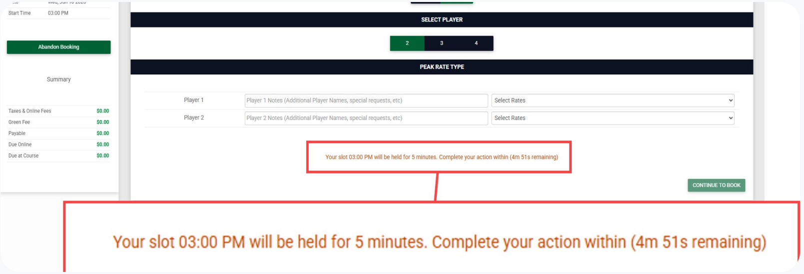
Navigation Steps: Settings → Course Tee Sheet Settings (per course) • Tee Sheet

Feature Explanation: Club Caddie temporarily holds slots when multiple golfers attempt to book at once, ending double-bookings.

- Held times appear as blocks on the tee sheet for staff visibility.
- Automatic release when booking is declined or window closed.
- Configure per-course. Max holds per user cap prevents concurrent abuse.
- Lottery requests are unaffected by holds.





FOR: Front desk / pro shop / starters

ADDITIONAL TEE SHEET IMPROVEMENTS

Smaller refinements that make check-in, counters, and search more reliable.

PAID CHECK-IN CLARITY

Unpaid check-ins now show a yellow tile and 'Unpaid' badge. The paid counter only counts players who are checked in AND fully paid.

Nav: Tee Sheet

SEARCH: DOUBLE-CLICK + EYE ICON

Double-click a customer row to select it during booking, and use the new eye icon to open a profile without leaving the flow.

Nav: Tee Sheet → Customer Search

BOOKING STATE RESTORED

Voiding a refund or raincheck now reverts the tee booking to its prior check-in and payment status automatically.

Nav: Tee Sheet

CROSS-DAY OVERLAP FIXED

Booking a tee time for another day in the same week no longer leaves both days overlapped on the sheet.

Nav: Tee Sheet

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REGISTER

Tax-exempt profiles, richer cloud receipts, and smarter item handling.

5 updates in this section

TAX-EXEMPT CUSTOMERS & MEMBERS

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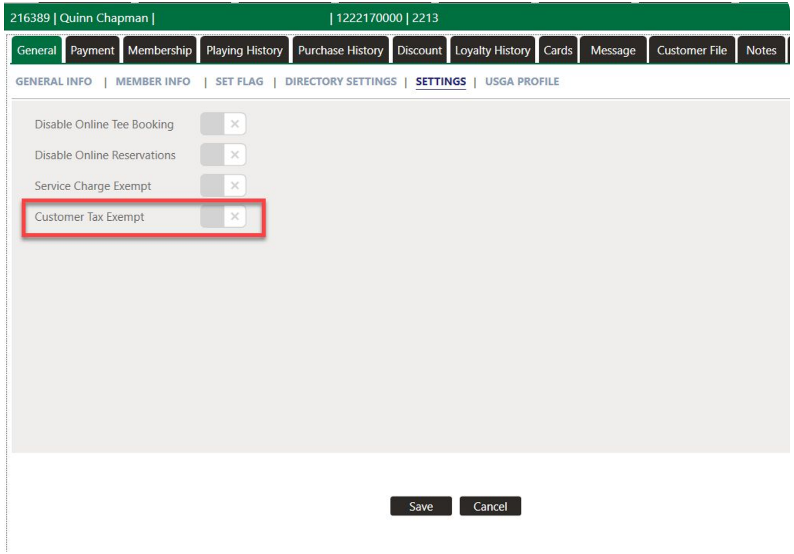
Navigation Steps: Customer / Member profile General Tab → Settings → Tax-Exempt • Set in Manage Roles

Feature Explanation: Mark an individual customer or member as Tax-Exempt right on their profile. Taxes are then automatically waived for that person at every point-of-sale transaction.

- No more per-transaction manual override at the register.
- Access to set the designation is controlled in Manage Roles, so only authorized staff can apply or change it.
- FOR: Admin to enable • POS staff benefit



TIP: Audit your membership list regularly to ensure tax-exempt status is only applied to valid non-profit or government accounts according to local laws.

FOR: POS staff / pro shop / F&B • Admin to enable

CLOUD & REGISTER & RECEIPT ENHANCEMENTS

Quality-of-life controls for busy pro shops and F&B operations.

ADD-ITEM BEHAVIOR SETTING

Reduce text on the ticket with the New Register Setting: combine repeated items into one line (higher quantity) or always create a new line per tap.

Nav: Settings → Register Settings

COMBINE LIKE ITEMS ON RECEIPT

Print shorter receipts. Repeated standard items consolidate to a single line with combined quantity. Modifiers, combos, preps, and seats still print separately.

Nav: Register

GIFT VOUCHER RECEIPTS LIST ITEMS

Receipts paid with a gift voucher now show the items sold alongside the discount and voucher payment, not just the payment lines.

Nav: Register

CLOUD RECEIPTS NOW SHOW MORE AND LOOK CLEANER.

MembershipID prints at the top to confirm the account being charged.

Loyalty point balance shows to track rewards at a glance.

A Payment Summary at the bottom lists every payment method used

Customer signature lines print correctly where required — important for chargeback disputes.

Discounts display so members and staff can verify the pricing applied.

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REPORTS & ACCOUNTING

Faster filtering, cleaner output, and revenue that reconciles.

4 updates in this section

REPORT IMPROVEMENTS

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Target Audience: Accounting / admin / managers

Better filters and more complete numbers across the reports you run most.

TERMINAL SUMMARY — MULTI-SELECT

Select multiple locations and terminals in one search. Filter buttons show counts, and the terminal list updates with your location picks.

Nav: Reports → Terminal Summary

AGING REPORT — TWO UPGRADES

Exclude $0.00 balances before printing or exporting, and a default landscape print layout so every column fits on the page.

Nav: Reports → Aging

SALES BY PAYMENT — NOW INCLUDES ECOM

Online (ECOM) credit card transactions are now included, so card revenue no longer looks missing during reconciliation.

Nav: Reports → Sales by Payment Method

MEMBER SPENDING — CLASS COLUMN

The Member Spending Report for Minimums now shows each member's primary active class beside their name.

Nav: Reports → Member Spending for Minimums

RATES, EVENTS & VOUCHERS

Year-specific rack rates, event charge returns, and voucher import upgrades.

4 updates in this section

RACK RATE SCHEDULING — WRAPAROUND RATES & MORE

Navigation Steps: Settings → Rack Rate Management → Edit or when Adding a new Rate → Date Type: Year Independent or Year Specific

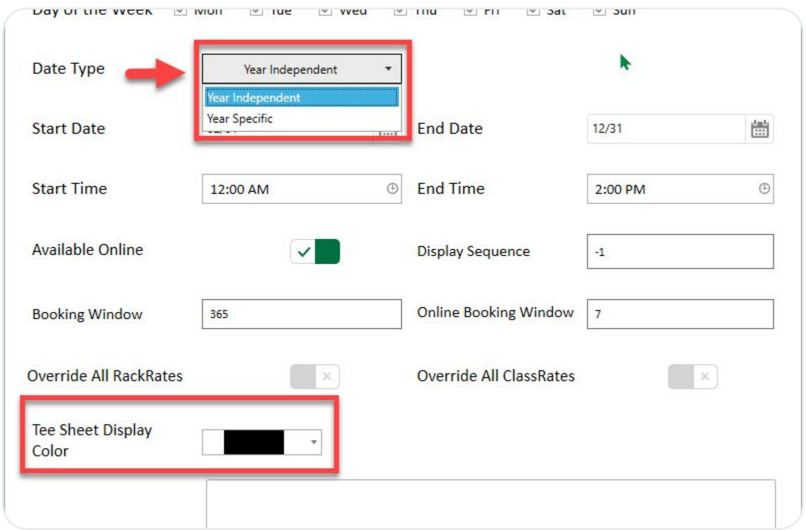
Feature Explanation: Plan seasonal rates with exact calendar dates and see them everywhere they're used.

- **Wraparound Rates** — a new Date Type field:

Year Independent: Recurring ranges, the original behavior.

Year Specific: Exact calendar dates. A seasonal rate that spans the year boundary (Nov–Feb) is now one rate instead of two.

- **Color-code each rack rate** — shows on the tee sheet tile and starter sheet.
- **Centralized Distribution** — rates flow through the distribution engine, rate map, and online booking from one place.
- **Enhanced Export** — includes every rack rate as a fill-in template; appears in the Active Rates report.



TIP: Use the export as your bulk-import template when rolling out a new season to save time and ensure accuracy across your rate schedule.

EVENTS & VOUCHER IMPROVEMENTS

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Cleaner refunds for event charges and faster voucher setup. **FOR:** Event staff / managers • Multi-course admin

EVENT CHARGE RETURNS

Process a full return on a sale paid by event charge through the normal POS refund flow. The refund credits back to the event balance automatically.

Nav: Register → Refund

RETURN GUARDRAILS

Returns can't be applied to deleted or closed events, and a charge from one event can't be refunded against a different event.

Nav: Register → Refund

VOUCHER IMPORT — ASSIGN DEPARTMENTS

Add an 'Assign Departments' column to your import file to set one or more departments per voucher at import time — no manual reassignment.

Nav: Vouchers → Import

NATIONAL GIFT CARD — PER-COURSE TOGGLE

Each course in a multi-course group can opt in or out of national gift card interclub reconciliation individually.

Nav: Settings → Gift Cards

BEFORE YOU UPGRADE

These aren't bugs — they change workflows you may already run. Brief your team.

BEHAVIOR CHANGES

Release 5.6

Read before deploy day

WORTH NOTING

WORKFLOW & NUMBER CHANGES

Totals and layouts below will look different after the upgrade — re-baseline reports and brief staff.

BOOKING MOVES NOW CHECK CAPACITY

Changing a time validates capacity; pasting Turn Time over a league is blocked.

Nav: Tee Sheet

SHIFT CLOSE OUT — TIPS & CHARGES

Service charges broken out; declared cash tips no longer reduce Cash Due.

Nav: Register → Shift Close Out

SERVER BANKING — TOOLS-MENU TIPS

Tips added via Tools menu no longer count in Cash Owed for servers.

Nav: Reports → Server Banking

MULTI-PLAYER EMAILS NOW SHOW TAX

Confirmation emails now include tax for all players; totals will be higher.

Nav: Online / Tee Booking

PDF RECEIPTS — PRICE + DISCOUNT

Discounted items show regular price plus separate discount line.

Nav: Emailed PDF receipts

FOR: Accounting / managers / front desk

Worth Noting

MORE BEHAVIOR CHANGES

A few smaller workflow shifts to confirm after the upgrade.

BILLING SCHEDULE — YEAR + EDITABLE STATUS

The billing schedule popup now shows the year with the month (e.g., 'January 2027') and lets staff mark entries paid or unpaid directly.

Nav: Customers → billing schedule

PDF RECEIPTS — NO-COST ADD-ONS HIDDEN

With 'Price Increases Only' set, $0.00 add-ons and modifiers no longer print as line items.

Nav: Emailed PDF receipts

CLONED TICKETS — TAX CARRIES OVER

Voiding and cloning a ticket now reproduces the original's tax.

Nav: Register

I-FRAME SETTINGS — COPY BUTTON WORKS

The copy icon next to each I-Frame link now places the clean URL on the clipboard.

Nav: Settings → I-Frame

NOTABLE FIXES IN 5.6

Customer-facing fixes shipping alongside the new features.

- Global View tee sheet shows the correct course's resources when navigating between courses.
- Sales by Payment Method now displays credit card transactions.
- Group reservation confirmation emails include all players, not just the first four.
- Voided cloned transactions apply service charge and tax correctly.
- Customer search no longer goes intermittently unresponsive while typing.
- Non-member classes are visible across all customer profiles.
- Online booking widget price filter reflects the actual maximum rate available.
- Aging Report now loads instead of throwing an error.
- Round counts match between Sales by Department and Round Breakdown.
- Mobile / portal guest bookings save with just first and last name, and names no longer clear on edit.
- QuickBooks Online sync covers the full date range in one operation.
- Online booking lets players add others to a group tee time.
- PIN-code login at the register can add items to a transaction without an error.
- Online booking price filter no longer sticks at $38 after a search.
- Clock In/Out report no longer fails on certain date ranges.
- Membership class rates apply on the day they take effect, not the next day.
- Partial refunds deduct only the loyalty points tied to refunded items.
- Mobile golfer check-in applies tax and appears in Sales by Department.

FOR: All roles

NOTABLE FIXES IN 5.6

Customer-facing fixes shipping alongside the new features.

- ✔ Global View shows the correct course's resources
- ✔ Group confirmation emails include all players, not just four
- ✔ Voided cloned transactions apply service charge and tax correctly
- ✔ Customer search no longer goes unresponsive while typing
- ✔ Non-member classes visible across all customer profiles
- ✔ Online booking price filter reflects the actual max rate
- ✔ Aging Report loads instead of throwing an error
- ✔ Round counts match across reports
- ✔ Guest bookings save with just a name; names stick on edit
- ✔ QuickBooks Online syncs the full date range in one run
- ✔ PIN-code register login can add items without an error
- ✔ Gift voucher receipts print the purchased items
- ✔ Clock In/Out report loads on all date ranges
- ✔ Membership class rates apply on their effective date
- ✔ Partial refunds deduct only the points tied to refunded items
- ✔ F&B app table layout matches the floor plan in real time

Plus additional behind-the-scenes performance and stability improvements.