5.7

NEW FEATURES

A practical guide to the changes in this release

GENERAL

FOR: Multi-course staff, GMs

COURSE NAME ON THE POS STATUS BAR

PATH Log in to Desktop POS → bottom status bar (change course with Switch Course)

WHAT CHANGED

The bottom status bar now shows the active course name next to the terminal name, so staff at multi-course facilities can confirm which course they are ringing a sale against before taking payment.

Switching courses updates the course name and leaves the terminal name in place.

Single-course facilities will not see a change.

The bottom status bar — course name at left, terminal and card reader at right

SECTION

3 updates in this section

REGISTER

Selling and settling at the counter

- Sell a Membership or Pass from the Register
- The Membership / Pass Sale Popup
- Recording Cash Received and Change in Split Pay
- Split Refunds Across Multiple Payment Types

REGISTER

FOR: Proshop staff, GMs

SELL A MEMBERSHIP OR PASS FROM THE REGISTER

PATH Register → TOOLS → Membership / Pass Sale

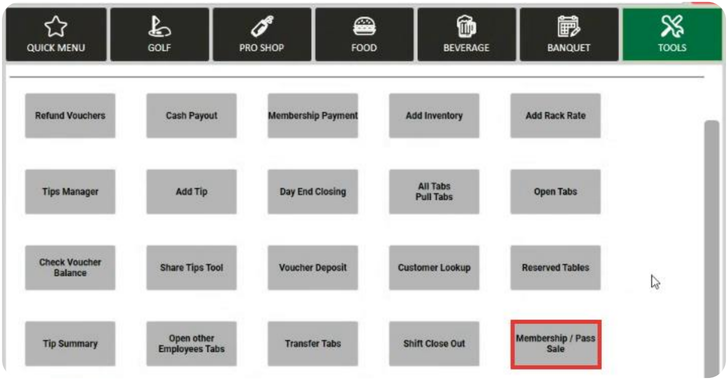
WHAT CHANGED

Staff can now sell a membership or pass without leaving the sale. The popup collects the customer, class, and dates, then takes payment on the spot or bills it later.

Strategy sets how a mid-cycle join is charged, so a customer joining partway through a billing cycle pays a prorated amount instead of full price.

Pay Now takes payment immediately. Pay Later bills the membership to the account.

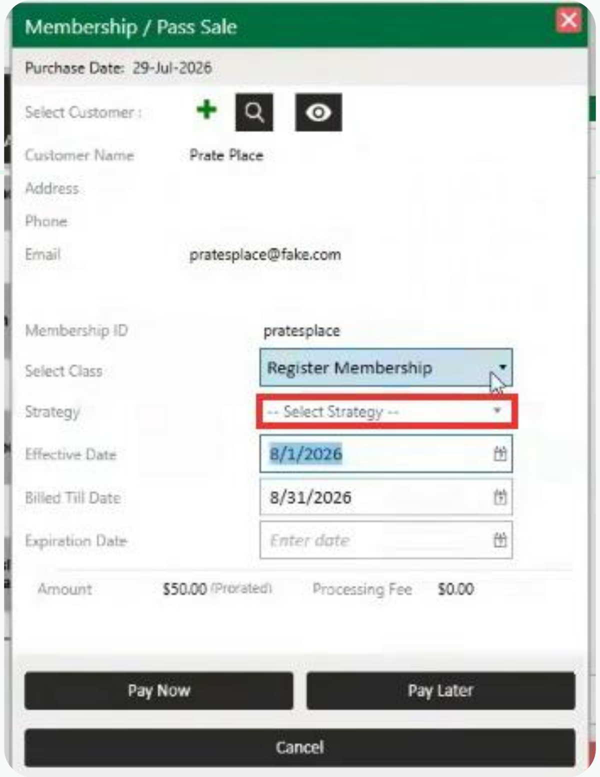
A membership paid with Pay Now appears in the customer's Purchase History, not on their ledger.



Learn more: Register: Selling a Membership or Class Pass →

THE MEMBERSHIP / PASS SALE POPUP

PATH Register → TOOLS → Membership / Pass Sale



WHAT CHANGED

One popup handles the whole sale. Pick the customer, choose the class, set Strategy, and the amount recalculates before you take payment.

Effective Date, Billed Till Date, and Expiration Date drive the billing window.

Amount shows the charge and flags it as Prorated when Strategy applies.

Confirm Strategy before taking payment — it is what makes the prorated amount appear.

Learn more: Register: Selling a Membership or Class Pass →

REGISTER

FOR: F&B managers, GMs

EMPLOYEE SALES BY SUB-DEPARTMENT ON THE SHIFT CLOSE-OUT RECEIPT

PATH F&B App → menu → Tools → Shift Close Out → Print · Desktop POS → Tools → Shift Close Out → Shift Summary

WHAT CHANGED

The shift close-out receipt now breaks down each employee's sales by sub-department, with a total line — a manager can see where a shift's revenue came from right on the receipt, no separate report needed.

Only sub-departments that recorded sales appear.

On both the F&B App receipt and the Desktop POS shift summary.

The clock-out receipt and Payroll Center prints are unchanged — the breakdown is on the shift close-out receipt.

Sales by Sub-Department

Sub-Department	Total
Alcohol	10.00
Drinks	24.00
Food	25.00
Gear	10.00
Other	10.00
Snacks	4.15
Total	**83.15**

Payment Method

Method	Tips/ Gratuity	Total(Incl. Gratuity)

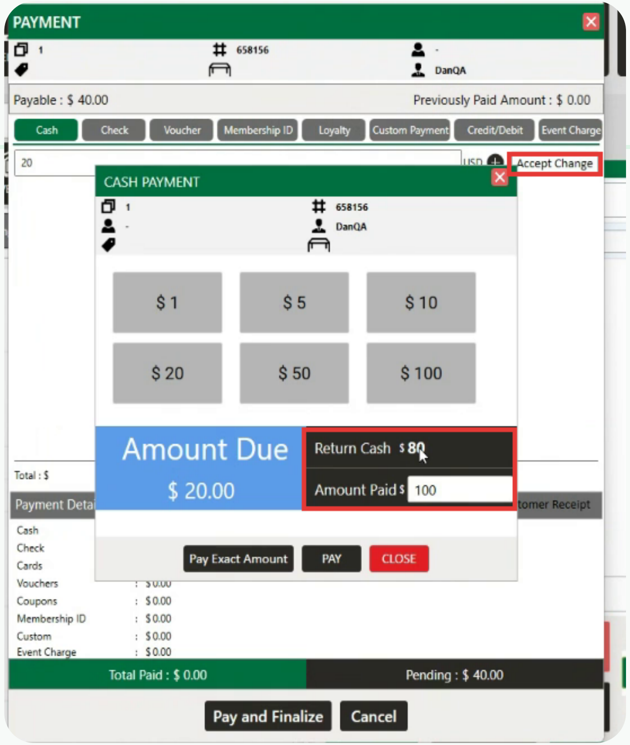
The new Sales by Sub-Department section, printed above the payment method table

REGISTER

FOR: Register staff, F&B servers

RECORDING CASH RECEIVED AND CHANGE IN SPLIT PAY

PATH Register → open the order → Split Pay → Cash → Accept Change



WHAT CHANGED

When part of a bill is paid in cash during a split payment, staff can now record what the customer actually handed over and let Club Caddie calculate the change owed.

Enter the amount being applied to the balance, select Accept Change, then enter the cash received.

Return Cash shows the change owed against Amount Due.

This brings Split Pay in line with the change calculation single-payment cash sales have always had.

SPLIT REFUNDS ACROSS MULTIPLE PAYMENT TYPES

PATH Sales → select the order → Split Refund

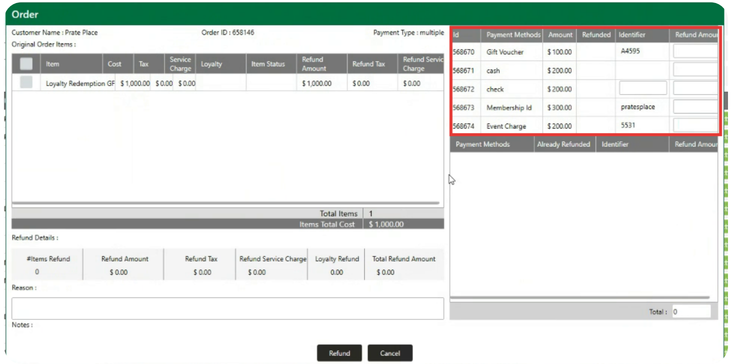
WHAT CHANGED

An order paid with more than one payment type can now be refunded back across those same payment types in a single transaction — a bill settled with a gift voucher and a card returns the correct amount to each.

Each original payment method gets its own Refund Amount field.

Where a gift voucher was part of the original payment, the refund routes to a gift voucher automatically.

Refunded vouchers appear in Vouchers as soon as they are issued — check there before repeating a refund.



SECTION

2 updates in this section

REPORTS

Reading the numbers with less math

- **Total Overtime Column**
- **Filter Sales by Department by Terminal**

REPORTING IMPROVEMENTS

Two changes that cut manual calculation out of routine reporting.

TOTAL OVERTIME COLUMN

The Clock In / Clock Out report now carries a separate Total Overtime column, so overtime can be read directly instead of being calculated from total hours.

Nav: **Reports**

Learn more: Reports: Clock In Out Report →

FILTER SALES BY DEPARTMENT BY TERMINAL

The Sales by Department report now supports selecting terminals, so revenue can be reviewed for one register or a group of registers rather than the whole facility.

Nav: **Reports**

Learn more: Sales by Department Report →

SECTION

2 updates in this section

SETTINGS

Configuration and the books

Send Inventory Discounts to Their Own Chart of Account

Inventory Item Popup Improvements

SEND INVENTORY DISCOUNTS TO THEIR OWN CHART OF ACCOUNT

PATH Settings → QuickBooksIntegration → Journal Entry Setup → ADD JOURNAL ENTRY

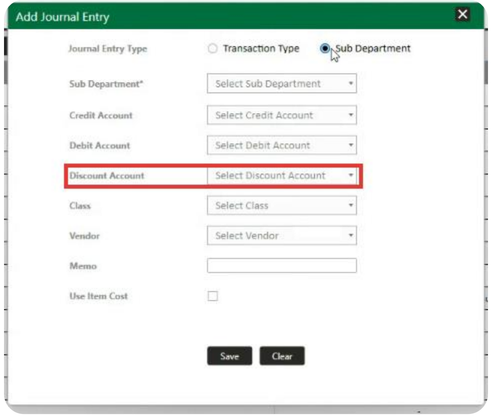
WHAT CHANGED

Discounts can now be mapped to a separate chart of account so they post to QuickBooks on their own line rather than being absorbed into the department total. Discounting becomes visible in the books.

Set Journal Entry Type to Sub Department, then set Discount Account to route discounts separately.

Discounts post as a debit.

Changing a mapping applies going forward. An earlier period only picks up a new mapping if the sync is run again for those dates.



Add Journal Entry popup with Discount Account called out

Learn more: QuickBooks: Journal Mapping →

SETTINGS

FOR: Proshop staff, F&B managers

INVENTORY ITEM POPUP IMPROVEMENTS

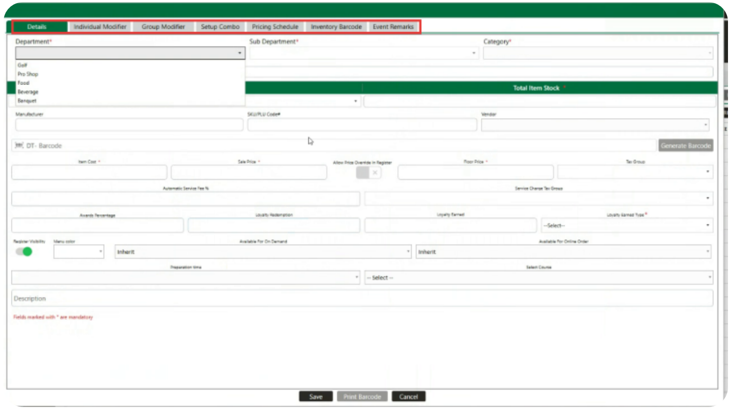
PATH Settings → Inventory Center → ADD ITEM, or right-click an item → View / Edit

WHAT CHANGED

The Add Inventory Item and Edit Inventory Item popups have been resized so more of the form is visible without scrolling, and the Modifiers tab is now two tabs — Individual Modifier and Group Modifier.

An individual modifier saves from its own row, with a confirmation prompt before a modifier is deleted.

Mandatory fields remain marked with an asterisk.



Save from the Details tab. Save your Details edits before moving to a modifier tab.

[Learn more: Settings: Add/Edit Inventory Item Popup Resized →]

WHAT TO DO NEXT

A short checklist

1. **Read the changelog**

   Share the 5.7 release notes with your team

2. **Check your GL mapping**

   If you track discounts, set a Discount Account so they post on their own line.

3. **Walk the counter staff through Split Pay**

   Cash and change in a split payment is the change staff will notice first.

4. **Check your terminal print settings**

   Merchant copies now print on cash sales wherever the behaviour is set to Print. If you would rather they did not, switch to Print Only On Tippable Payments.