CLUB CADDIE

a Jonas Software Company

5.12 NEW FEATURES

A practical guide to the changes in this release

SECTION

1 update in this section

GENERAL

Ready for what's next

Compatible with the upcoming split item and fractional quantity release

GENERAL

FOR: GMs, admins

READY FOR SPLIT ITEM AND FRACTIONAL QUANTITY SALES

PATH Desktop POS 5.12

WHAT CHANGED

This Desktop update makes your terminals compatible with our upcoming split item and fractional quantity release. With it installed, every terminal is ready when that release arrives.

Make sure every Desktop terminal at your club is on 5.12. We will share more details about that release separately.

Check the version in the bottom right corner of each terminal's screen.

SECTION

2 updates in this section

REGISTER

Faster at the counter

Barcode Scanning Anywhere

Quicker Refunds

REGISTER

FOR: Cashiers, front counter staff

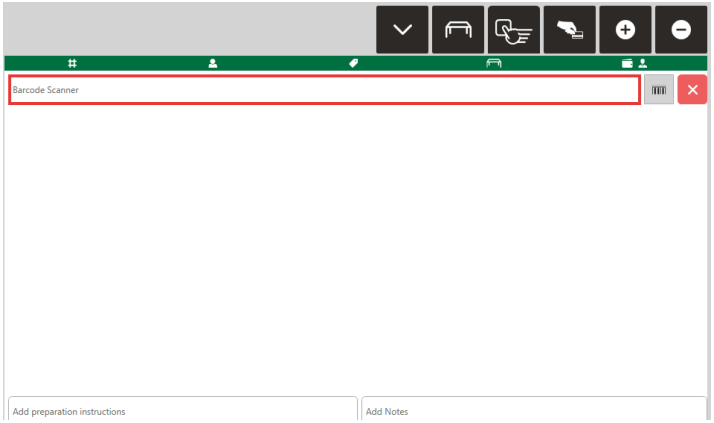
BARCODE SCANNING ANYWHERE

PATH Register

WHAT CHANGED

Staff no longer need to click into the Barcode Scanner box before scanning. Scanning an item from anywhere on the Register screen adds it to the order.

No extra click before each scan. Keeps the line moving at a busy counter.



Register with the Barcode Scanner box not selected

Scan as soon as the Register screen is open.

Learn more: Scanning a Barcode →

REGISTER

FOR: Cashiers, managers

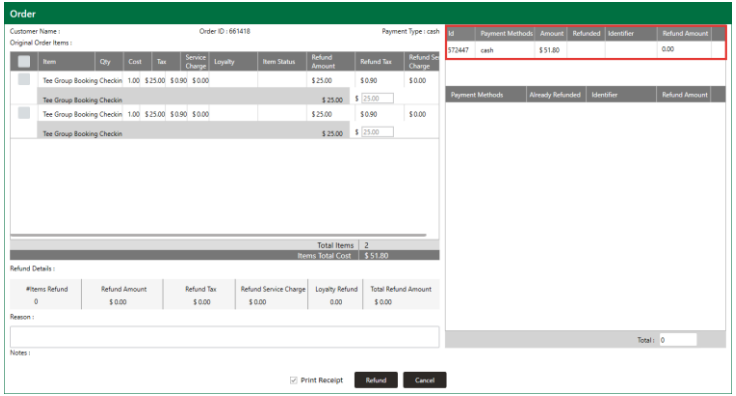
QUICKER REFUNDS: ONE WINDOW

PATH Sales → select the order's menu → Refund

WHAT CHANGED

Refunds now open in the split refund view by default, with the order's items and its payment methods side by side in one window.

Select the items to refund on the left. Payment methods and their refund amounts show on the right.



Refund window: items on the left, payment methods on the right

Use the Reason box to note why the refund was given.

Learn more: Sales : Refunding an Order →

REGISTER

FOR: Cashiers, managers

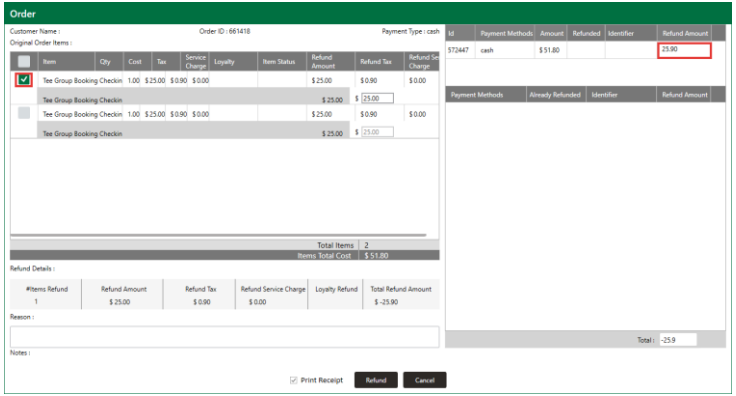
REFUND AMOUNTS FILL IN FOR YOU

PATH Sales → select the order's menu → Refund

WHAT CHANGED

When the order was paid with one method, the refund amount fills in on that method as you select items.

Select an item and its refund amount appears on the payment method. For orders paid with more than one method, staff enter the split themselves, as before.



One item selected: the cash refund amount fills in

Check the Total at the bottom right before you click Refund.

[Learn more: Sales : Refunding an Order →]

SECTION

1 update in this section

SETTINGS

Loyalty Point Expiration

Choose an expiration strategy

See Valid Till dates in the Loyalty Ledger

SETTINGS

FOR: GMs, admins

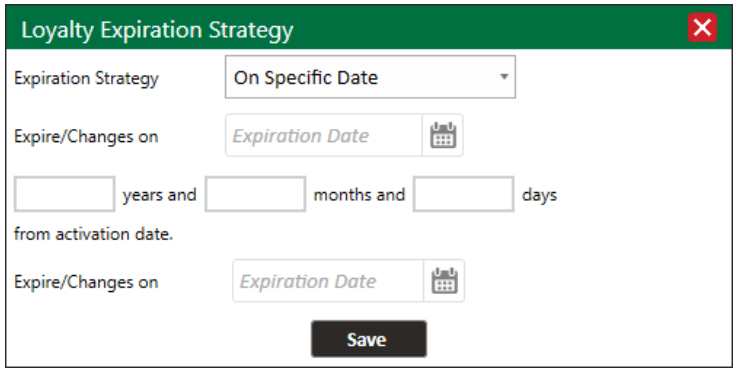
SET LOYALTY POINTS TO EXPIRE

PATH Settings → Register Settings → Loyalty → Expiration Strategy

WHAT CHANGED

Clubs can now set loyalty points to expire, using one of three expiration strategies.

On a specific date. After a set number of years, months and days from the activation date. On the same date each year.



Loyalty Expiration Strategy window

Tell members about the expiration rule before you turn it on.

Learn more: Loyalty Points Overview →

SETTINGS

FOR: Front counter staff, managers

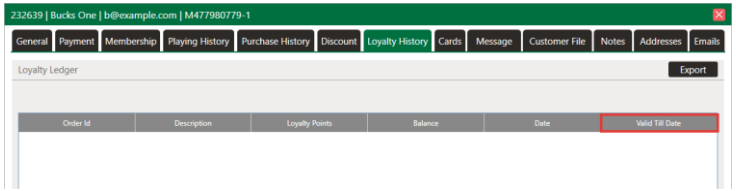
VALID TILL DATES IN THE LOYALTY LEDGER

PATH Customer → Loyalty History

WHAT CHANGED

The customer's Loyalty Ledger shows a Valid Till Date for each entry.

When staff add points by hand with Make Adjustment, they can apply the expiration strategy. Or they can set their own Valid Till date.



Loyalty Ledger with the Valid Till Date column

Use the Valid Till Date to answer member questions about when points expire.

Learn more: Loyalty Points Overview →

WHAT TO DO NEXT

A short checklist for the week the release lands.

1. **Update every terminal**

   Get each Desktop terminal on 5.12 so it is ready for the split item and fractional quantity release.

2. **Show your cashiers**

   Scan right away, and use the one window refund view.

3. **Decide on point expiration**

   Pick a strategy and tell members before you turn it on.