Micros & GLF. Connect

Instructor Manual



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Payment Preferences

On activation of the Micros integration on a GLF. Connect system, you will see new payment preferences at checkout and via the schedule. These will be:

Pay via Credit Card or Cash

This payment preference is intended to be used when a member or guest intends to pay for their booking at the physical POS location, such as the golf shop. This payment preference will appear to both Members and Guests.

Package

This payment preference is intended to be used for members and guests who have a pre-purchased lesson package which has already been sent and closed out on Micros to sit on the general ledger and funds reside in the balance sheet. The package is available as lesson credits in the students account in GLF. and these credits can be applied to their students booking.

Pay Via Member Charge

This payment preference is for <u>Members ONLY</u>. It is intended to be used when a member is authorizing their member account to be charged for the relevant booking amount. When this is used, the POS user should NOT expect the member to come to the physical location to make payment.

• Pay Via Member Credit Book

This payment preference is for <u>Members ONLY</u>. It is intended to be used when a member is authorizing their credit book account to be charged for the relevant booking amount. When this is used, the POS user should NOT expect the member to come to the physical location to make payment. **NOTE: If Credit Book funds will not cover the balance due, the remaining balance will be Member Charged to the member account.**



Why are these titled payment preferences?

We are naming these options as payment preferences in this documentation as in GLF these options are just defining how the member or guest intends to pay for their booking. The actual payment processing occurs within Micros. This payment preference is important as it impacts when a transaction is pushed from GLF. and how the transaction displays on the check presentation screen in Micros.

Processing a Lesson Package

Processing a lesson package can be completed via the online Coaching Store on the GLF. Connect web/mobile web-based system. Select **Lesson Packages** in the menu or Store in the mobile apps:



• Step 1 - Select a Student

After selecting your lesson package, at the checkout stage you will need to select the member or guests account in GLF. Connect from the drop down list.

	Une	CKOUL	
0. Select Student			
Select Player or Add New			
Aaron Blinstrub			
1			
Add New Player			•
Aaron Blinstrub			
Aaron ELLIOTT Tracy			
Aaron McCaffity			
Aaron Shaw			
Abby Lauterbach			

Please Continue on the next page

• Step 2 - Push to Micros

Next select from one of the payment preferences at checkout outlined on Page 2 of this document. The option you choose here should be based on how the member or guest intends to pay for their lesson package as this will appear on the check presentation screen on Micros:

C	 Pay via Credit Card or Cash (i) Pay for your lesson in the Golf Shop via the point of sale. 	
	Pay via Member Charge (i)	
	Pay via Credit Book (
В	Back Continue	
3.	3. Payment information	
4	1. Confirm order	

On confirming, the package will be pushed immediately to Micros and will appear on the Micros Transactions screen under 'Lesson Packages' tab:

Booking Transa		Sactions Sub	os	ons					
			Purchase	Store Order			S	how 10 •	- entries
Student Name	Product Name	Coach	Date	No.	Amount	Payment Type	by	Status	Action
Aaron Blinstrub	2 Month Bronze Program - 6 Hours	Brad McCollum	06/07/2023	73186	\$549.00	Pay via Credit Card or Cash	Brad McCollum	•	•

Step 3 - Close on Micros

To tender the check on Micros you will need to note the Payment Preference that is displayed on the check. This will be:

 Pay via Credit Card or Cash - You should expect the student to come into the Golf Shop to pay for the package and then charge out to credit card or cash:

OpenCet Service & Fex Mrchunder Puckages F.K.B Voorber Member Beperimere Mice Functions Pay Member Cool GLE Connett Connett <td< th=""><th>01119-Golf Shop 1</th><th>D</th><th>sfault</th><th>Retail Transaction Ca</th><th>meelled</th><th>Pre</th><th>ildents</th><th></th><th>All Day</th></td<>	01119-Golf Shop 1	D	sfault	Retail Transaction Ca	meelled	Pre	ildents		All Day
Member Lookup Gef. Connect Select Check Const Select Check Apply Voyalty Programs Member Lookup Form Member Lookup Form Select Check Const Select Check Member Charge Member Additional Info Member Additional Info Member Additional Info Solect Check Member Additional Info Member Additional Info Member Additional Info Solect Check Solect Select Solect Select Solect Select Credit Solect Select Solect Select Solect Select Solect Select Solect Select Solect Select Solect Select Credit Solect Select Solect Select Solect Select Solect Select Solect Select Solect Select Solect Select Credit Solect Select Select Solect Select Select Solect Select Select Solect Select Selec	Open Check Services & Fees I	Merchandise	Packages			Member Experience	Misc	Functions	Pay
Charge Wember Additional Info Wember Additional Info Credit Cred Book Softwardw Softward	Member GLF. Connect > Lookup Golf Package 549.0 Brush Codit Codit Code Code Name: Blinstrub, Aaron Bernett Code: EPONNO Loyalty	657.0 6/7/2003 30:20 AM 00 *		1/1 GLF. Connect			Select	Check	All Open Checks
Credit Book Cash Der Credit Cash Der Credit Total Due : \$49,00 Total Due : \$49,00 Cash Credit Total Due : \$49,00 Cash Credit Cash C	Charge		Member Additional Info						
	CLOSE Credit Book Cash The Cash The Cash The Cash	0.00 0.00 549.00	Non Member						
			Notes Modify	, Spli	t Barco	de Entry	Send & Stay	Print	Send/Done

✓ Pay via Member Charge - You should not expect the member to come into the golf shop to pay and you should charge out to Member Charge.

Member Lookup Pay vi Name			Individ Packages	ual Package Re F&B	demption 91.5				
Member Lookup	Aaron/58817/S/ Del onnect	fault 181.1/1	Packages	F&B	Marcalina				
Member Lookup Pay vi Name	onnect	fault 181.1/1 CHIX 6010247			voucner	Member Experience	Misc	Functions	Pay
	via Member Charge le: Shaw, Aaron efit Code: EPORNG punt #: OR013	6510 47/7003 32 34 AM	Member Lookup Form	Shaw, Arron/58817/ 1/1 1/5, Connect 10:34 AM	67 60102477 \$ 549.00	-	Select	Check	All Open Checks
Member Charge		^							
Credit Card		~	Member Additional Info						
Credit Card CLOSE		•							
Credit Book		••	Non Member						
Cash Subtotal Tax Other Ch		0.00 0.00 549.00 Due : 549.00		J					
Cancel/Sign Out	Remove	Quantity	Notes Modil	y Spl	it Barco	ode Entry	Send & Stay	Print	Send/Done

Pay Via Credit Book - You need to confirm funds are in credit book will cover payment, if funds <u>will not cover</u> payment, the outstanding amount will remain on check and will be closed to Member Charge or another closing method.

01	1119-Golf Shop 1		Sefault	Retail		Pres	idents	All	Day
				Transaction Ca	ncelled				
Open Check	Services & Fees	i Merchandise	Packages	F & B	Voucher	Member Experience	Misc	Functions	Pay
	Blinstrub, Aaron/588 GLF. Connect Golf Package Parvia Credit Book Name: Blinstrub, Aaron Account * : Z8H90	6/7/2023 10:49 AM 549,00 *	Member Lookup Form	Binstruk, Aerony500 1/1 GLF. Connect 10:d0 AM	60102479 \$ 549.00		Select	Check	All Open Checks
Member Charge Credit Card AUTHORIZE		~	Member Additional Info						
Credit Card CLOSE		-							
	Subtotal Tax	0.00 0.00	Non Member						
Cash Cancel/Sign Out		549.00 otal Due : 549.00 Quantity	Notes Mod	ify Split	Baro	ode Entry	Send & Stay	Print	Send/Done
	McCollum, Brad		6/7/2023 10:41-13 AM			Online		Online	

Once the Package check is tendered out on the Micros this will reflect back in GLF. Connect after a short period. The status will be updated on the Micros Transactions Screen:

Booking Transac	ctions Lesson Package Tran		bscription Transacti						
Status Guide:	Pushed to Micros	Paid via Mic	ros						
							S	Show 10	~ entries
Student Name	Product Name	Coach	Purchase Date	Store Order No.	Amount	Payment Type	Processed by	Push Status	Action
Aaron Blinstrub	2 Month Bronze Program - 6 Hours	Brad McCollum	06/07/2023	73186	\$549.00	Pay via Credit Card or Cash	Brad McCollum		•

The package will then be deposited into the students GLF. Connect account which can be used on future lesson bookings. In the example below the students has purchased a package of 6×1 Hour Lessons at a price of \$549.00 which has then deposited 360 instructoring credits into their account:

AC	CADEMY CREE	DITS							
T	e.g. Name	Q		×	DEACTIVATED CF		EW USED CRE	DITS 🛃 E	XPORT
В	ulk Deactivate 🗸	CTION					Sh	10 V	entries
	Active Credits	Active Subscriptions							1
	Player	Email	Package Name	Purchase Date	Expiry Date	Coach	Lesson Credits	Balance	Action
	Aaron Blinstrub	invitedtraining@training.com	2 Month Bronze Program - 6 Hours	05/04/2023	07/04/2023	Brad McCollum	360	300.00	•
Sho	owing 1 to 1 of 1 entr	ies					PF	REV 1	NEXT

IMPORTANT

- For all of these payment preferences, the lesson package will be sent to the Micros POS system immediately.
- Lesson credits for the package and any confirmation e-mails relating to the purchase will not be sent until the transactions has been closed on Micros.
- Until the transaction is closed on micros, the students package credits will not be able to be applied to a booking in the schedule/booking system.
- If a Lesson Package has been sent incorrectly. It is vital that the push is cancelled from the Micros Transaction Screen in GLF.

Applying Package Credits to a Booking

Once a lesson package has been deposited into the member or guests account on GLF. Connect, these lesson credits can then be applied to private lessons in the booking system or in the schedule:

• Step 1 - Select Package Payment Methods

At the checkout stage on the web or mobile apps, select the option 'Package' from the payment preferences:

		10:37 ∢ App Store	CHECKOUT	.iti 56 🖼
PLE	ASE SELECT YOUR PAYMENT METHOD:	COACH: Brac	McCollum	
C	Pay via Credit Card or Cash (i)	Private Lesson: \$	23 - 60 MINUTES	
•	Package ()	Aaron McCat Club Member z0425-01 Phone		6
С	Pay via Member Charge ①	invtedtraining@trainin biscourt Select Payment Opti Select Payment Type		
С	Pay via Credit Book 🛈	Cancel SE	ELECT PAYMENT	Done
	ASE SELECT THE LESSON PACKAGE BELOW. SELECT THE RADIO ICON AND PLETE YOUR BOOKING BY SELECTING CONFIRM BOOKING.	Pay	a Credit Card or Cash Package via Member Charge vy via Credit Book	1

Step 2 - Apply Credits to the Booking

The lessons package that exists on the member or students accounts will populate and can be selected by choosing the circle icon to the left hand side of the package on the web. The package will appear as a pop up after selecting this payment preference. In the example of lesson credit minutes, the member or guest needs to have enough lessons credits in their account to cover the lesson duration. So for example, a 60 minute lesson will require a minimum of 60 lesson credits in the students account to complete the booking.

		AGE BELOW. SELECT TH CTING CONFIRM BOOKII		I AND	10:37 App Store Package Brad McCollum Package code	ыі 56 @ Selection 📜 🚍
LESSON TYPE	COACH NAME	CREDIT CODE	TOTAL CREDITS	REMAINING CREDITS	Lesson Type 600.00 Total Credits	Private Lesso 540.00 Remaining Credits
PRIVATE Lesson	BRAD MCCOLLUM	HHY95BHHHEGXCP1P6	600.00	600.00		
					SELECT	PACKAGE
						OSE

Step 3: After completing the booking, the lesson will be processed and successfully added to the schedule. It will appear as Red (Pending Push) and can then be pushed on the day of delivery from the lesson start time:



At the point of completing the booking, the lesson credits are deducted from the students account on GLF. Connect, we can see in the example below 60 credits have been deducted from the students accounts and this is visible in the Academy Credits screen:

Active Credits	Active Subscriptions							
Player	Email	Package Name	Purchase Date	Expiry Date	Coach	Lesson Credits	Balance	Action
Aaron Blinstrub	invitedtraining@training.com	2 Month Bronze Program - 6 Hours	06/07/2023	08/07/2023	Brad McCollum	360	300.00	•

IMPORTANT

- The price of the booking will be calculated based on the lesson package creation in the store.
- The booking needs to be pushed to Micros on or after the day of delivery for the funds to be deducted from the general ledger.

Color Guide on the Schedule for Private Lessons

On the schedule view on both the web and app, the color guide has been updated to help you identify the payment statuses of private lessons in relation to Micros. On the schedule view you will see three colors:



Red / Pending Push:

These are private lessons which have not yet been pushed to Micros across all payment preferences. Lessons can only be pushed from the start time of the lessons and you are responsible for pushing a transaction to Micros.



Orange / Pushed to Micros:

These are private lessons which have been pushed to Micros POS but the transaction has not yet been closed out. You cannot make any changes to this transaction in GLF. However users with manager rights can cancel the push.



Green / Closed on Micros:

These are private lessons which have been closed out on the Micros POS and GLF. has retrieved this status. You cannot make any changes to this transaction on GLF. once it has been closed.



Closing Out a Private Lesson

It is your responsibility to push a private lesson transaction from GLF using the correct payment preference once it has been delivered. Before pushing a transaction from GLF. we recommend you check the following:

- Is the payment preference for the lesson correct? This will appear on the check presentation on Micros. It can be amended from the schedule.
- Is the price of the transaction correct? This will be the transaction amount sent to Micros.
- Is the booking filter correct? This is vital for accurate reporting and reconciliation in GLF.
- **Is the duration of the booking correct?** This is vital for accurate reporting and reconciliation in GLF.

Once you have checked the information about for the specific transaction, you can push to Micros from the web based system or mobile apps:

Step 1 - Close and Push

From the Lesson Details Screen and the Student Appointment screen on the mobile apps you can select the button 'Close and Push':

LESSON DETAILS		Payment Status: • Pending Pend	ush
Student Name: Elisa Botha Lesson Date: 6/7/2023	Mobile : Payment Type : Pay Via Credit Book	invitedtraining@training.c	com
Lesson Start Time: 14:00 Lesson End Time: 15:00	Payment Status: Pending Push Price: \$100.00 🖋	START Jun 07 2023 16:00 Un 0	D 7 2023 17:00
Lesson Type: Private Lesson Lesson Booked On: 6/7/2023	Internal Notes 🗹 Checked In:	Checked In	
CLOSE & PUSH MOVE LESSON DELET	TE LESSON CHANGE PAYMENT TYPE CHANGE DURATIO	View Media	
		Move	
	15:00 - 16:00	Delete	
	Aaron Blinstrub		

Please Continue on the next page

If the push is successful, you will see a success alert and the booking will turn orange on the schedule view. It is at this point, that you cannot amend the booking and the transaction will need to be closed on Micros by the POS user.

Lesson Price	10:30	
Pay via Credit Card	Aaron McCaf	
	11:00	
Booking Pushed		
The booking has been successfully pushed to Micros.		
The payment status has been updated.	12:00	
Ok		
Change Payment Type		
	13:00	

Step 3 - Close Out on Micros

To tender the check on Micros you will need to note the Payment Preference that is displayed on the check. This will be:

- **Pay via Credit Card or Cash** You should expect the student to come into the Golf Shop to pay for the lesson and charge out to credit card or cash.
- **Pay via Member Charge** You should not expect the member to come into the golf shop to pay and you should charge out to Member Charge.
- **Pay Via Credit Book** You need to confirm funds are in credit book will cover payment, if funds will not cover payment, the outstanding amount will remain on check and will be closed to Member Charge or another closing method.



• **Pay Via Package** - Lessons tied to a package have already been charged to the member/ guest and therefore the process is different whereby the funds need to be deducted from the Package Redemption Ledger. A lesson tied to a lesson package will appear on the check presentation as 'Package':



Move to the 'Pay' tab at the top of the POS. Select 'other payments' blue tab on the right. Select 'Package' Redemption to close the check to the package funds balance sheet account where funds were previous deposited when the lesson package was original purchased:

				Cash 5	549.00				
Open Check	Services & Fees	Merchandise	Packages	F&B	Voucher	Member Experience	Misc	Functions	Рау
	Blinstrub, Aaron/15: Def GLF. Connect 1 Player Development 1 - Bra McCollum	GST 0 6/7/2023 10:29 AM	Will reduce gues amount and ter	olfer Coupons – st rate to coupon nder that portion ce sheet.		ellaneous de In One	Will give Gu certific	al Golfer Coupons – uest the value of the cate toward the	Main Gift Cardsv Credit Bool
Apply Lovalty	Package Name: Blinstrub, Aaron Benefit Code: EPORNG		ACTIVE Ideal	Golfer Coupons	Golf Club 1	Trade In/Trade Up	tender this p	nied guest rate and ortion to the balance uest should pay the	Gift
Programs	Account #: Z8H90	-	\$29 Ideal Golfer		Associati	on/League Fees		g value of GF/CF.	Certificate Old Gift Car
Member			\$32 Ideal Golfer		G	iroupon	EXPIRED 1	Ideal Golfer Coupons	IBS Gift Certificate
Charge		^	\$35 Ideal Golfer		Tr	avel Zoo	EXPIR	ED \$29 Ideal Golfer	Other
Credit Card		~	\$37 Ideal Golfer		Charity	Classic Tender	EXPIR	ED \$35 Ideal Golfer	Payments
AUTHORIZE			\$39 Ideal Golfer		Club Rev	vard Certificate	EXPIR	ED \$37 Ideal Golfer	(Golf) Tax
Credit Card CLOSE		-	\$45 Ideal Golfer		to process the	will be for the Clul redemption of the	EXPIR	ED \$39 Ideal Golfer	Exemption
Credit			\$49 Ideal Golfer			igh the IdealGolfer hant Site	EXPIR	ED \$45 Ideal Golfer	
			\$59 Ideal Golfer		Package Pademotic	Pay From Balance	EXPIR	ED \$49 Ideal Golfer	
Cash		91.50 0.00 I Due: 91.50				Sheet Account	EXPIR	ED \$59 Ideal Golfer	
ancel/Sign Out	Remove	Quantity	Notes	Modify	Split Bar	code Entry S	and & Stay	Print Se	end/Done
Book	Tota	l Due : 91.50	\$59 Ideal Golfer	Modify	Merc Package Redemptic	hant Site	EXPIR	ED \$49 Ideal ED \$59 Ideal	Golfer

After the check is tendered on Micros, the status will then be updated on GLF. to close on Micros (Green). This will update on the schedule:



The status will be updated on the Micros Transaction screen:

Aaron Blinstrub	Lesson	\$91.50	Package	Non Deferred Transaction	185000237	06/07/2023	06/07/2023	٠	•	
			Pay via Credit Card or	Non Deferred				-	-	

IMPORTANT

- If you are unable to push a transaction successfully, please check with your Manager user that the Instructor SKU numbers have been setup correctly
- Private lesson transactions can only be pushed from the start time of the lesson on the day of delivery
- Private Lesson transactions can be pushed after the day of delivery but SOP for this should be discussed with your manager.
- The push to micros can be cancelled by Manager users from the Micros transactions screen and on the mobiles apps by instructores
- Once a Private lesson is closed on Micros updates cannot be made to the booking in GLF.

Color Guide on the Class Details Screen

On the class details screen on the web or mobile apps, a color guide has been implemented to help you identify the micros payment status of GLF. Connect class bookings.



Red / Pending Push:

These are class revenue or class sessions which have not yet been pushed to Micros across all payment preferences. Revenue for a class can be pushed to Micros at any time but is required to be pushed and closed prior to pushing the delivered amount. Class session delivered amounts can only be pushed from the start time of the class session and you are responsible for pushing a transaction to Micros.



Orange / Pushed to Micros:

These are class revenue or class sessions which have been pushed to Micros POS but the transaction has not yet been closed out. You cannot make any changes to this transaction in GLF however users with manager access can cancel the push the web and instructores can complete this on the Mobile



Green / Closed on Micros:

These are class revenue or class sessions which have been closed out on the Micros POS and GLF. has retrieved this status. You cannot make any changes to this transaction on GLF. once it has been closed.

	invitedmicrost	raining.glfconnect.cor	n/Proshop/I	ndex_NBS#						ው 🗅 🖈	
CL	ASS DE	TAILS - Total	Numb	er of Atte	ndees:	3					×
	Send Message 1	o Attendees Atter	idees ~							Export Atte	ndee
Pu	ish Revenue	~ Action				Status (Guide: 🔴 Pendi	ng Push 🛑 F	Pushed To Micros	Paid Via	Micros
	Player Name	Player Email	Mobile No	Booked Date	Amount Paid	Payment Type	Revenue Push Status	Payment Date	Delivered Push Status	Checked In	Action
	Amanda Zellner	invitedtraining@trai ni		06/08/2023	\$200.00	Pay via Credit Book	٠	06/08/2023	٠		₿
		invitedtraining@trai				Pay via Member	-		_		



Revenue & Delivered Amount for Classes

For class transactions in GLF. there are two steps that are important to understand in relation to transactions being pushed to micros:

Class Revenue

This is the amount that is to be paid by the member or guest when registering for the class:

- The revenue is required to be pushed to Micros ahead of the first class session or on the day of delivery.
- A GLF. user is responsible for pushing the revenue, this will not be pushed automatically.
- Revenue can be pushed to Micros at any time regardless of the payment preference by a instructor, manager or Pro Shop user. Instructores can complete this process on the mobile apps.

Class Session Delivered

This is the amount related to each class session and is also split according to the number of instructors delivering a class session and how revenue is assigned in the class builder:

- The class session delivered amount can only be pushed to Micros from the class start time on the day of delivery.
- Class session delivered amounts can only be pushed to micros when revenue is Paid via Micros (Green)
- The percentage or fixed amount assigned to each instructor delivering a class session will be pushed to micros in different transactions
- Class sessions which have revenue assigned to Non Instructoring Amount cannot be pushed to Micros and the class will need to be edited.



Class Setup Compliance

It is vital that classes are setup correctly prior to transactions being pushed to the Micros POS from GLF. Connect. As is discussed in the Instructor SOP Manual there are two steps in relation to classes, including pushing the initial revenue when the class place is to be booked and paid, and pushing the delivered amounts when each session within the class is delivered.

You team is responsible for ensuring full compliance with how classes are setup in the GLF. Connect system and that the amounts assigned for the class place and how each class session delivered is being paid out to instructors is accurate. We have detailed below some important compliance steps below:

- Instructors need to ensure that each class is built correctly into GLF. Connect, including ensuring the number of sessions within the class is added to the schedule and the price of the class is setup as per how it is marketed to your members/ guests.
- ☑Only instructors that are delivering class sessions should be assigned to each class session at Step 3 of the class builder.
- The length of the class session that is being delivered should be inputted accurately into GLF. Connect to reflect the actual length of class that is being delivered to your members and guests
- When students register for the class, they should be added to the specific class they are attending and inputted at the correct price that they are paying for their class place
- ✓Instructors need to ensure that the pro rota function is enabled when building a class if they are allowing students to book onto classes when class sessions have already been delivered i.e attending from session 2 if session one has already been delivered. The GLF. Connect system will automatically calculate the price and add students to the sessions they are attending
- Prior to pushing the revenue, instructors need to ensure that the price the member or guest is paying is accurate and make any adjustments prior to the push if you are amending the price of the booking.
- It is best practice to push the revenue for a class on the day of the first session. This will help to avoid any instances of refunds needing to be given in exceptional circumstances.
- When instructors deliver a class session, you should push the delivered amount for each student if they attend the class.
- Prior to pushing the delivered amounts, it is vital instructors ensure that the revenue for the class session is assigned correctly to the instructors delivering the class session at Step 3 of the Class Builder using the percentage option. Revenue can be assigned as follows:
 - **Percentage Amount** This should be used when class sessions are being delivered by a single or multiple instructors and when each instructor is receiving a percentage split of the revenue generated. The percentages assigned should add up to 100%.

Instructors should only push the delivered amounts when a class session has been delivered

☑Once class revenue is pushed, you cannot delete class sessions and if a refund is absolutely necessary please contact the relevant support teams.

Pushing Class Revenue

It is your responsibility to push class session revenue for all payment preferences. Class Revenue is required to be pushed and closed on Micros before pushing the delivered amount.

In the image below we can see that the revenue for three of the students and across all payment preferences are required to be pushed and the delivered push status is therefore red for the class session and any subsequent sessions:

Devin Stine	invitedtraining@trai ni	06/09/2023	\$100.00	Pay via Credit Book	٠		•	0
Jasmine Lance	invitedtraining@trai ni	06/08/2023	\$100.00	Pay via Credit Card or Cash	•	06/08/2023	•	•
Jonathan Fralick	invitedtraining@trai ni	06/09/2023	\$100.00	Pay via Credit Card or Cash	٠		•	0
Nicolas Escobar	invitedtraining@trai ni	06/09/2023	\$100.00	Pay via Member Charge	•		•	0
ss Name: Hal ach: Brad Mc (f Day Golf School - Thur Collum	sday June 8th @ 2	pm	Program Ty Date: 6/8/2 0				

Before pushing class revenue to Micros we recommend you check the following:

- Is the price of the class booking correct? This will be the transaction amount sent to Micros.
- Is the booking filter correct? This is vital for accurate reporting and reconciliation in GLF.
- **Is the payment preference correct?** This will appear on the transactions and instruct the POS on the charging method.

Once you have checked the information above for the specific transaction, you can push to class revenue to micros from the web based system or mobile apps.

Please Continue on the next page.

Step 1:

From the class details screen (on the web) or the class appointment screen on the Mobile apps, select the student(s) you require:

• Selecting a Single Student:

You can select the Push Revenue option in the action icon for any student where the micros payment status is red (Pending Push) or select the student from the Class Attendees tab on the mobile Apps and select the checkbox next to the student:



Selecting Multiple Students:

You can select the checkbox to the left hand side of each student and then select Push Revenue from the drop down selection for any student where the Micros payment status is red (Pending Push) or select multiple students using the checkbox from the Class Attendees tab on the mobile Apps as shown above:

	Send Message to Att	Action				
	Player Name	Player Email	Mobile No	Booked Date	Amount Paid	
	Aaron McCaffity	invitedtraining@trai ni		05/03/2023	\$150.00	
	Adam Gaudet	invitedtraining@trai ni		05/03/2023	\$150.00	
	Cameron Greenwood	invitedtraining@trai ni		05/03/2023	\$150.00	
		in dia divala in a Otral				

Step 2:

If the push is successful, you will see a success alert and the revenue push status will turn orange on the class details/appointment screen. It will also show on the Micros Transactions screen under the booking Transactions Tab as deferred revenue.

If you make any errors in the class revenue transaction then it the best practice procedure to 'Cancel the Push' from the Micros Transaction screen or via the Mobile Apps for instructores (Coming Soon).



Please Continue on the next page.

Step 3 - Close out on Micros

To tender the check on Micros you will need to note the Payment Preference that is displayed on the check. The check will automatically be assigned to the Golf Package tender to sit on the general ledger. This payment preferences will be:

- Pay via Credit Card or Cash You should expect the student to come in the Golf Shop to pay for the class and charge out to credit card or cash.
- **Pay via Member Charge** You should not expect the member to come into the golf shop to pay for the class and you should charge out to Member Charge.
- **Pay Via Credit Book** You need to confirm funds are in credit book will cover payment, if funds will not cover payment, the outstanding amount will remain on check and will be closed to Member Charge or another closing method.



Once the check is tendered out Micros, this will reflect back into GLF. As paid via Micros (Green) on the micros Transactions screen and on the Class Details Screen (web) and Class Appointment screen on the mobile apps:

	Player Name	Player Email	Mobile No	Booked Date	Amount Paid	Payment Type	Revenue Push Status	Paymer Date	
	Alex Johnson	invitedtraining@trai ni		06/08/2023	\$100.00	Pay via Member Charge		06/08/20	Coaches (1) Coach Brad McCollum Class: Half Day Golf School - Thursday June 8t
	Benjamin Lawing	invitedtraining@trai ni		06/08/2023	\$100.00	Pay via Credit Book		06/08/20	Class Attendees Class Sessions Search Attendees Q
	Devin Stine	invitedtraining@trai ni		06/09/2023	\$100.00	Pay via Credit Book	•		Revenue Push Status Pay via Credit Card
	Jasmine Lance	invitedtraining@trai ni		06/08/2023	\$100.00	Pay via Credit Card or Cash		06/08/20	Micros Transaction I.D: Lance, Jasmine/592934/C/ 2023-08-08
]	Jonathan Fralick	invitedtraining@trai ni		06/09/2023	\$100.00	Pay via Credit Card or Cash	•		O Jonathan Fraick Revenue Push Status Pay via Credit Card or Cash
	Nicolas Escobar	invitedtraining@trai ni		06/09/2023	\$100.00	Pay via Member Charge	•	-	Micros Transaction I.D: Dicolas Escobar Dicolas Escobar Dicolas Escobar Dicolas Escobar

Please Continue on the next page.

IMPORTANT

- If you are unable to push a transaction successfully, please check with your Manager user that the Instructor SKU numbers have been setup correctly
- It is your responsibility to push a class revenue amount for all class types, students and for all payment preferences
- Class delivered amount cannot be pushed if revenue is assigned to Non Instructoring Revenue in the class builder.

Push Class Session Delivered Amount

It is your responsibility to push the delivered amount for each class session that is delivered for each student. This is vital step to ensure that your GLF. Connect system accurately reflects the class sessions that have been delivered for each student so that the revenue can be realized from the general ledger.

There are some important points to note here:

- Delivered amount for classes can only be pushed on a session by session basis.
- Delivered amount for classes can only be pushed when the Revenue has been pushed and closed on Micros.
- Delivered amount for classes can only be pushed for each sessions on the day of delivery and from the start time of the lesson.
- If multiple instructores are delivering a class session, the delivered amount will be sent as multiple checks to micros based on the split assigned in the class builder in GLF.

In the example below, we can see that the revenue has been closed on Micros and updated in GLF. The delivered amount for the session is yet to be pushed to Micros:

Send	Message to	o Attendees Atten	ndees ~							Export Atte	ndee
Push F	Revenue	Action				Status 0	Guide: 🔴 Pendi	ng Push 🛑 F	Pushed To Micros	Paid Via	Micros
Play	yer Name	Player Email	Mobile No	Booked Date	Amount Paid	Payment Type	Revenue Push Status	Payment Date	Delivered Push Status	Checked In	Actio
	Amanda Zellner	invitedtraining@trai ni		06/08/2023	\$200.00	Pay via Credit Book		06/08/2023	٠		8
Be	en Verel	invitedtraining@trai ni		06/08/2023	\$200.00	Pay via Member Charge		06/08/2023	•		
Jas	son Aster	invitedtraining@trai ni		06/08/2023	\$200.00	Pay via Credit Card or Cash		06/08/2023	•		
lass N	Name: Gar	ne On Step 1 - Thu	rsday Jun	e 8th @ 6pm		Program ⁻	Type: Game On Le	arner Program			
Coach:	Brad Mc	Collum				Date: 6/15	5/2023				
Start Tir	me: 18:00					End Time	: 19:30				
)escrip	otion: Gam	e On Step 1 - Thurs	sday June	e 8th @ 6pm							

To close a class session for single or multiple students follow the steps below:

• Step 1:

From the class details screen (on the web) or the class appointment screen (mobile apps), select the student you require:

• Selecting a Single Student:

You can select the 'Close and Push' option in the action icon for any student where the micros payment status is Green (Paid via Micros). This is the revenue which has already been pushed and closed:

	Send Message t	to Attendees Atter	ndees ~							Export Atte	indee
Pu	ish Revenue	 ✓ Action 				Status	Guide: 🔴 Pendi	ng Push 🛑 P	ushed To Micros	Paid Via	Micros
	Player Name	Player Email	Mobile No	Booked Date	Amount Paid	Payment Type	Revenue Push Status	Payment Date	Delivered Push Status	Checked In	Action
	Amanda Zellner	invitedtraining@trai ni		06/08/2023	\$200.00	Pay via Credit Book	•	06/08/2023	Resche		8
	Ben Verel	invitedtraining@trai ni		06/08/2023	\$200.00	Pay via Member Charge	•	06/08/2023	Internal		8
	Jason Aster	invitedtraining@trai ni		06/08/2023	\$200.00	Pay via Credit Card or Cash	٠	06/08/2023	Close 8	₁ Push	8
Cla	iss Name: Ga	me On Step 1 - Thu	rsday Jur	e 8th @ 6pm		Program	Type: Game On Le	arner Program			
Co	ach: Brad Mc	Collum				Date: 6/1	5/2023				
Sta	urt Time: 18:00	D				End Time	: 19:30				
De	scription: Gan	ne On Step 1 - Thur	sday June	e 8th @ 6pm							

On the mobile app, you can select the 'Class Sessions' tab on the class appointment screen. From here, you should select the session you require to see a list of students. You can then select single or multiple students in the class:

< Class Details 🚱 🖸	Class Details
Coaches (1)	Coaches (1)
Coach Brad McCollum Class: Game On Step 1 - Thursday June 8th @ Class Attendees Class Sessions	Brad McCollum
Session 1 Thu Jun 08 , 2023 (From 18:00 to 19:30 >	Search Attendees Q
Session 2 🗎 Fri Jun 09 , 2023 🕒 From 16:00 to 17:30	Revenue Push Status Delivered Push Status
Session 3 Thu Jun 22 , 2023 From 18:00 to 19:30	Micros Transaction I.D:
Session 4 🚔 Thu Jun 29 , 2023 🕐 From 18:00 to 19:30	Revenue Push Status
	Micros Transaction I.D:
	Jason Aster
	Revenue Push Status Delivered Push Status
	CLOSE & PUSH TO MICROS

• Selecting Multiple Students:

You can select the checkbox to the left hand side of each student and then select 'Close and Push' from the drop down selection for any student where the Micros payment status Green (Paid via Micros). You can also select multiple students on the class session screen on the Mobile Apps per the above steps:



• Step 2:

If the push is successful, you will see a success alert and the delivered push status will turn orange on the class details/appointment screen and on the Micros Transactions Screen. It is at this point, that you cannot amend the booking and the transaction will need to be closed on Micros by the POS user to deduct the funds from the general ledger.

				< Class Details	
al Numb	er of At	tendees: 4	-	Coaches (1)	
tendees ~			iding Push 🔴 Pu	Session 2 Fr Jun 09, 2023 Sest Reve	tal
il No	e Boo Da	Push Successful! The booking has been pushed to	h Payment Date	Micro Micro The booking has been succe pushed to Micros. The booking status has been updated.	essfully
®tra	05/03	Micros successfully and the status has been updated.	05/03/2023	Micros Transaction I.D:	
®tra	05/03	ок			ed Push Sta
etra	05/03/2	023 \$50.00 Pay via Credit Book	05/03/2023	CLOSE & PUSH TO MIC	POS

If you make any errors in the class revenue transaction then it the best practice procedure to 'Cancel the Push' from the Micros Transaction screen or via the Mobile Apps for instructors.

Step 3 - Close out on Micros

Class sessions that are delivered are tied to the Class Revenue which has already been charged to the member/guest. The funds need to be deducted from the Balance Sheet Account. A class session delivered amount for each student will appear on the check presentation as 'Pay from Balance Sheet':



A check will appear on the check presentation for each student and there may be multiple checks for each student if multiple instructors have delivered the class session. In the example below, three students attended the session, but six checks are visible as the revenue delivered for the session is assigned as 50% to Instructor A and 50% to Instructor B:

01	119-Golf Shop 1		Default	Ret	il .	Pres	idents		All Day
				Serv	ice				
Open Check	Services & Fees	Merchandise	Packages	F&B	Voucher	Member Experience	Misc	Functions	Pay
	Johnson, Alex/594246 De	efault тв. 1/1 снк 6010257:		Johnson, Alex/59	1246	Johnson, Alex/594246	Stin	e. John/594247/C	All Ope
	GLF. Connect 1 Standardized Program 1 - Brad		Member Look	1/1 GLF. Connect 9:14 AM	60102575 \$ 25.00	1/2 GLF. Connect 9:14 AM	60102576 1/3 GLF. (\$ 25.00 9:14 /	Connect AM	60102577 Checks \$ 25.00
Apply	Pay from Balance Sheet Ace Name: Johnson, Alex	count	Form	Stine, John/59424	7/C	Escobar, Nicolas/594	Esce	obar, Nicolas/594	
Loyalty Programs	Benefit Code: EPORNG Account #: Z8953			1/4 GLF. Connect 9:14 AM	60102578 \$ 25.00	1/5 GLF. Connect 9:14 AM	60102579 1/6 GLF. 0 \$ 25.00 9:14 /	Connect AM	60102580 \$ 25.00
Member Charge		^							
Credit Card		~	Member Additional	Info					
Credit Card CLOSE		-							
Credit Book		••	Non Member						
	Subtotal Tax Tota	25.00 0.00 Il Due : 25.00							
ancel/Sign Out	Remove	Quantity	Notes	Modify 5	plit Barco	de Entry	Send & Stay	Print	Send/Done
	McCollum, Brad	_	6/9/2023 9:15:13	AM		Online		Online	

Please Continue on the next page.

Move to the 'Pay' tab at the top of the POS. Select 'other payments' blue tab on the right. Select 'Pay from Balance Sheet Account' to close the check to the balance sheet account where funds were previous deposited when the class revenue was original purchased:



Cancelling a Push

To resolve instances where a transaction has been pushed to Micros incorrectly there is option to 'Cancel the Push'.

Cancelling a Push on the Web

On the web this functionality is available from the Micros Transactions Screen on the web. This is only available when transactions have been pushed (Orange) but have not yet been closed on Micros.

After finding the transactions within the specific tab, navigate to the action menu icon on the right hand side of each transaction row and select 'Cancel Push':



In order to Cancel the push of a specific transaction, the check should be visible on the Check Presentation Screen and not an open check. If the check is open then an error message will appear on GLF. When attempting to cancel:

SACT Lesso Pushed to	1 Package Trans		sure the check is n	s micros transaction. ot a live active check ation area on the POS	in the check	Store Admin	Emails -
king)	Amount	Payme	nt Type	Transaction Type	SKU	Booked Date	Push Date
on	\$100.00	Pay via Cr	edit Card or	Non Deferred	185000237	06/07/2023	06/07/2028

The check should appear as per the below image in order for it to be cancelled:



After selecting the option to 'Cancel the Push', a success message should appear and the transaction should disappear from the check presentation screen on the POS and the status return to Pending Push (Red) in the schedule view on GLF. The transaction will also be removed from the Micros Transactions screen:



Member Lookup Form	REMOVED	
Member Additional Info		

Cancel Push for Mobile Apps

Cancelling a Private Lesson Push

Via the schedule view, the user should select the booking showing the orange Pushed to Micros status. On the lesson appointment screen, the button will then appear showing the option to 'Cancel Push'. After a short period, an alert will appear advising that the push has been cancelled and status will return to red >



Via the class appointment screen, users can cancel a revenue push for a class via the class attendees tab. After selecting the student via the checkbox or long hold for android users, the 'Cancel Push' button will display. After a short period, an alert will appear advising that the push has been cancelled and the revenue status will return to red >

The process for cancelling class session delivered transactions is identical and can be completed via the sessions tab, and the specific class session.





IMPORTANT

- It is vital that any transactions which have been sent to Micros from GLF. that then need to be voided out, for example due to an incorrect price are cancelled from GLF.
- Voided transactions in Micros and changes to prices of transactions sent from GLF. will be reflected back to GLF however this is not best practice guidance.

Linking Checks to Member Accounts

You may encounter on rare occasions checks being pushed to Micros from GLF. Connect that are not correctly tied to the specific members account. In order to then tender the check using the Member Charge payment type, you may encounter the following alert on the POS:

(00245-Club Shop		D	efault		Re				Reg / Mixed		A	ll Day
						Ca	sh						
Open Ch	eck												
4ember Lookup ₽	Canales, Nic GLF. Connec Golf Packag Pay via Mer	t Derault	HK 60160396 1/2023 2:30 PM	Member Lo	ookup	60160396 GLF. Connect 2:30 PM	563177/C/2023-08-0	\$ 425.00	60160407 GLF. Connect 2:30 PM		Dilley, Erica/66425 60160394 GLF, Connect 2:30 PM		\$ 425.00
Apply Loyalty Programs		Error		Form		Sbensen, Pete/6	64285/C/2023-08-0		 Huber, Stefanie/56 	9949/C/2023-08-01	Juszczak, Ashley/6	54293/C/2023-08-	01
Member Charge			OR	mber Looki			embershi	p acc	ount			269/C/2023-08-01 4245/C/2023-08-0	\$ 425.00
						0	k				_		\$ 425.00
Credit Book			••	Non Memi	per	60160403 GLF. Connect 2:30 PM		\$ 425.00	60160397 GLF. Connect 2:30 PM	\$ 42	.00		
Cash	Subtotal Tax Other Chg	Total Due:	0.00 0.00 425.00 425.00										
ancel/Sign Out	Remo				Modify				de Entry	Send & Sta	y Pr	int	Send/Done
	Milligan, Io	ho M		8/8/2023 2	55-34 PM				Online			Online	

When you encounter this alert, click OK and you will then need to find the correct members account within Member Lookup.

Select "Member Lookup" > Type in the Members Name that was not tied into the integration > Select this Member into the Check presentation to tie the account together:

							Sig	gned I	n: 94	995 N	ЛсColl	um						
Open Check	Services & Fees	Merchan	lise		ackages						Vouch		Mer	nber Exp	perience	Misc	Functions	Pay
	Default	Membe	r Lookup Form															All Open
Member Lookup		Hon	ne Club															Checks
LOOKUP			Name					Club #		^	Home Cl Member	Number	Z8782	Corp EP (2	01119)			
			ıb at Hill ıb LeCor					02570 03179			Family R Member		00	Cotropia				
Apply Loyalty			bCorp B					01119		- 11	Preferree	Name:	1000	Cotropa	3			
Programs		Cotr						01115		~	Birth Dat Annivers							
			0 Name		First			am Ref. I		_	Benefit C		EPOR	NG:				
			tropia		Tod				Z8782		Member Member			orate EP	Orange			
Member			tropia		Jac	kie	(01 3	Z8782		Join Date Account		08/02					
Charge											Tax Exen		Yes No		e Privileg ocal Allia	e: Yes nce: No		
											Select	with the		n-Memb		Member		
Credit Card										[Mem			harge		Additional Info		
AUTHORIZE		Es	Q	w	Е	R	т	Υ	U	1	0	Р	7	8	9			
Credit Card							-		t	.	.			-				
CLOSE			Tab	Α	S	D	F.	G	н	1	K	L	4	5	6	Back		
Credit		-		z	х	с	v	В	Ν	м			1	2	3			
Book			-	+			_	<u> </u>		<u> </u>	ť			-	-			
		8	ע @			Spa	ace			1.				0	•	Cancel		
Cash Subt	total		.00															
Tax		C	.00			—		-										
Cancel/Sign Out	Remove	Quantity		Note	s		Modify			Split		Bar	ode Ei	ntry		Send & Stay	Print	Send/Done
	McCollum, Brad		<u> </u>			9:43:017		_					On				Onlin	

After selecting the correct member you may encounter the message below and you can bypass

this by clicking OK:

	00245-Club Shop				Defauit				ī	Vemb		arge	425.0	0				g / Mixed			Ali Day	
Open Ch	neck																					
Member Lookup	Juszczak, Ash GLF. Connect Golf Packag Pay via Men	2 4	8/ H	ome Club Iub Name)		otry C	lub		lub #)1843			Home Cl Member Family Re	Number:			untry Clu	ıb (00245)	6016	Connect	23-08-01 \$ 12	75.00
Apply Loyalty Programs			S ju:	TARM(tonebr szc	OUNT	FORE	STC	DUNTE	RY CL (Member Preferrec Birth Dat	Name: i Name:	Mrs. A		ıszczak	₽	6016	Connect		25.00
Member Charge			ال ال ال	uszcza uszcza uszcza uszcza uszcza	< < N	ror ot a	llow	ved v	vith	non-		nue	serv	ice c	harg	e pc	ostino	Away Yes	6016	Connect		25.00
				Esc (Q	w	Е	R	т	Y	U	T	0	Р	7	8	9	ditional Info				
				Tab		A	s	D	F	G	н	J	к	L	4	5	6	Back				
Credit Book				+	-	z	x	С	v	В	Ν	М	,		1	2	3					
Cash	Subtotal Tax Other Chg	Total D		25.00	<u>@</u>			Spa	ace			•	-			0		Cancel				
Cancel/Sign Out	Remo	/e	Quantity			Notes			Modify	,		Split		Baro	code Er	ntry		Send & Sta	,	Print		Send/Do

The check will then be correctly tied to the specific member and can be closed out as per the guidance provided in this documentation for the different transaction types. Once the check is correctly tied to the member you see the check display like the example below:

	Juszczak, Ash Default	CHK 60	0160395		Juszczak, Ashley/
Member	GLF. Connect	8/8/202	23 2:30 PM		60160395
Lookup	Golf Package Pay via Member Charge <mark>Name: Juszczak, As</mark> hley	425.00 *		Member Lookup	GLF. Connect 2:30 PM
Apply Loyalty	Benefit Code: XLDADV Account #: J0197			Form	 Mehta, Deran/66 60160406
Programs					GLF. Connect 2:30 PM Pendley, Nicole/6
Member			~		60160401
Charge					GLF. Connect 2:30 PM
			~	Member Additional Info	

Once you have tied the check to the member, you may encounter an alert indicating the member does not have the correct charging privileges setup through Member Pride. When this occurs, in order for the check to be closed out via Member Charge the check would need to be tied to the Primary or Secondary Members account via Member Lookup as per the steps above:

Open Ch	neck	Services &	ጿ Fees		Merchandise	Packages	F & B	Misc	_	Functions	Pay
nber	Mehta, De GLF. Conne			160406			664269/C/2023-08-01	Mehta, Sumita/664273/C/20	23-08-01	Pendley, Lance/664241/C,	2023-08-01
okup	Golf Pack Pay via N	age ember Charge	425.00 *	3 2:30 PM	⊾ Member Look	60160406 GLF. Connect 2:30 PM	\$ 425.00	60160405 GLF. Connect 2:30 PM	\$ 425.00	60160404 GLF. Connect 2:30 PM	\$ 425.00
oply /alty	Name: M Benefit C Account				Form	Pendley, Nico	e/664245/C/2023-08-01	Schumacher, Dennis/664261. 60160403 GLF, Connect	/C/2023-08-01	Zoller, Otilia/664289/C/20	23-08-01
grams					Notification	GLF. Connect 2:30 PM	\$ 425.00		\$ 425.00	GLF. Connect 2:30 PM	\$ 425.00
nber arge				^	STOP! TH		this account has NO charge pr s required for payment.	rivileges			
edit Card nly				~	Member Add	ок	Cancel				
edit Card				•							
edit ook				••	Non Member						