
Micros & GLF. Connect

Updated 31st October 2024

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**

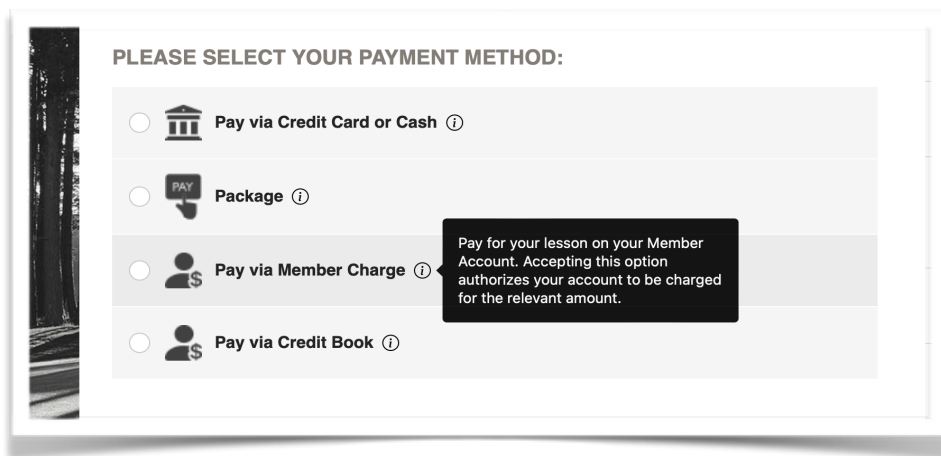
This payment preference is intended to be used for members and guests who have a pre-purchased lesson package which has already been sent and closed out on Micros to sit on the general ledger and funds reside in the balance sheet. The package is available as lesson credits in the students account in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

- **Pay Via Member Charge**

This payment preference is for Members ONLY. 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 Members ONLY. 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?

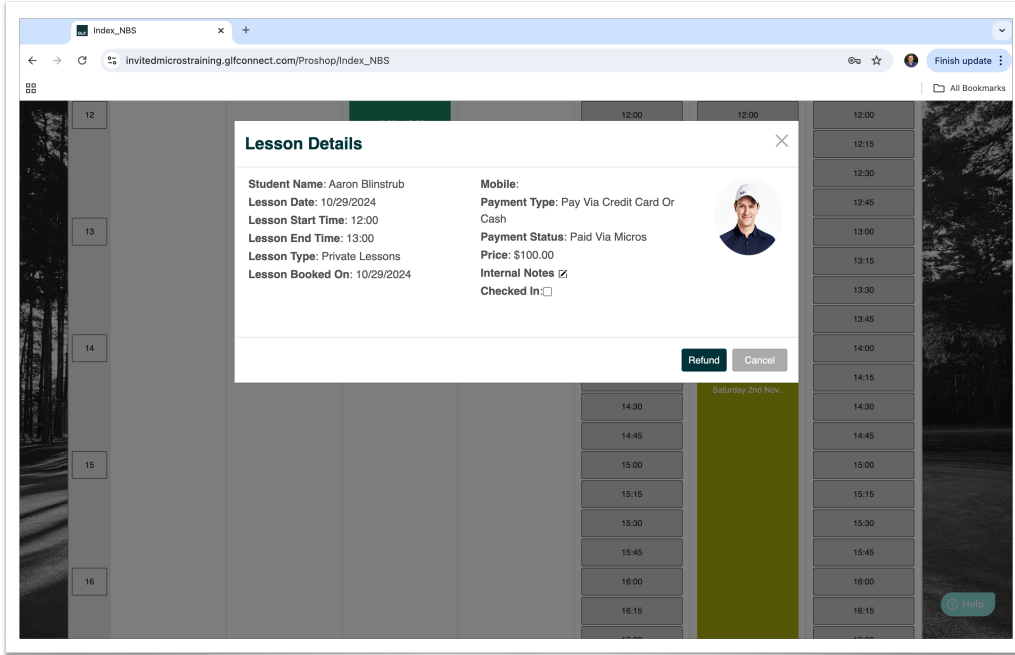
We are naming these options as payment preferences in this documentation as in GLF these options are just defining how the member or guest intends to pay for their booking. The actual payment processing occurs within Micros. This payment preference is important as it impacts when a transaction is pushed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

Refunds

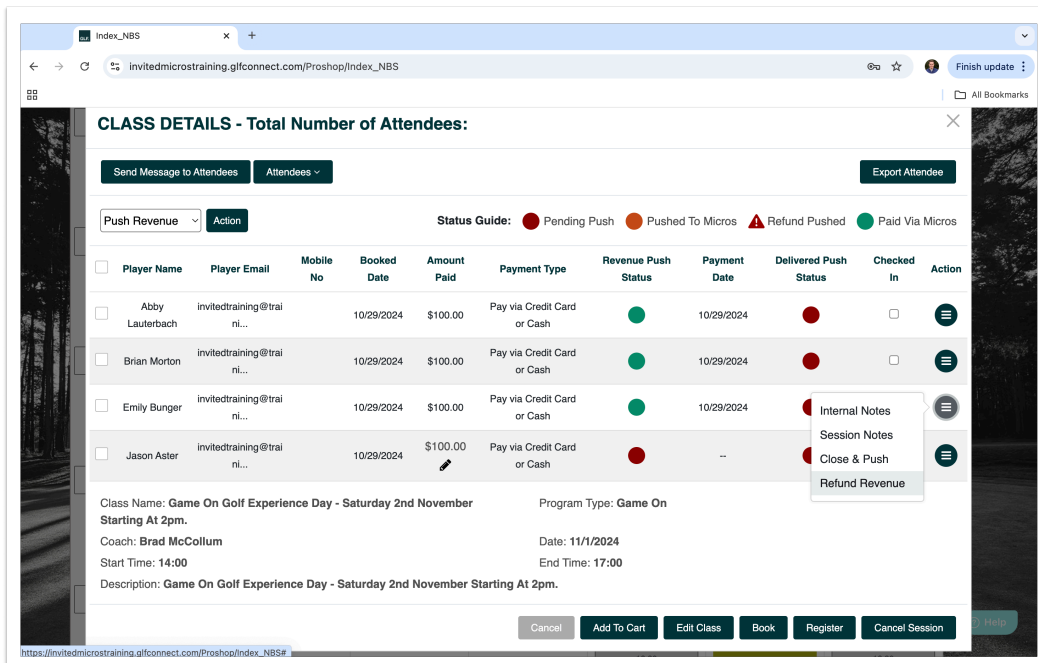
The ability for users to issue refunds for transactions depends on having the appropriate rights within the system. These rights have been granted to individuals at your facility who hold these operational responsibilities to issue refunds. Users without these rights will still be able to see transactions for which refunds have been issued through the schedule and the Micros Transactions screen.

Users with the appropriate refund rights can process refund checks for the following transactions directly at the POS:

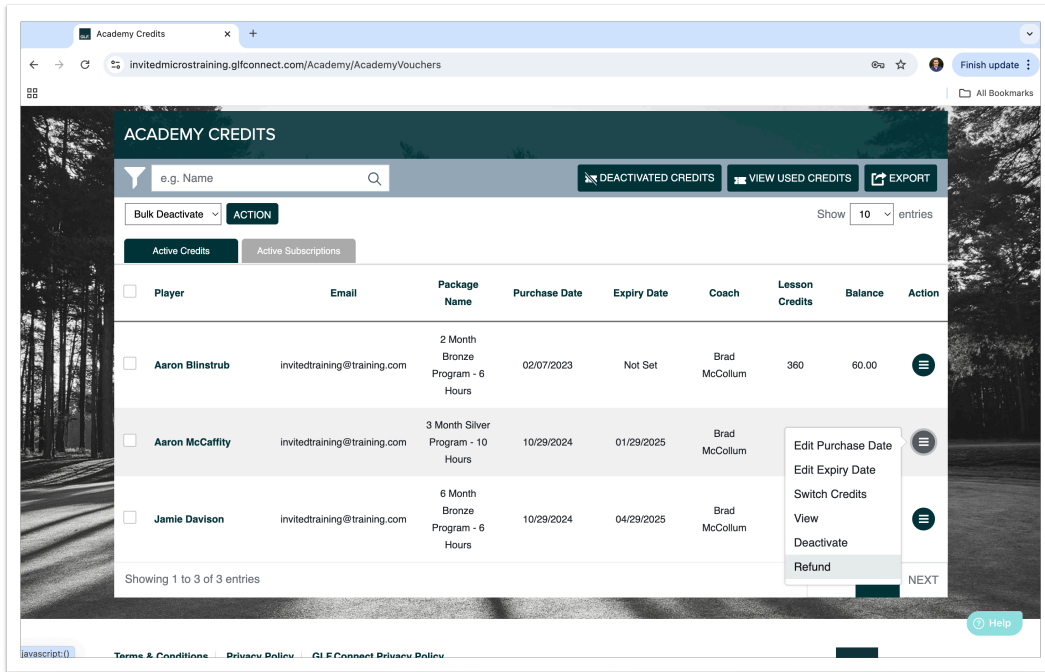
1. **Private Lesson Charge:** This applies to any one-on-one booking, such as club fitting or private lessons. The initial charge for the lesson is eligible for a refund:



2. **Class Revenue Charge:** This refers to the initial revenue charge for a class booking. A refund can be issued only if the session amount for any class has not yet been closed on the POS:

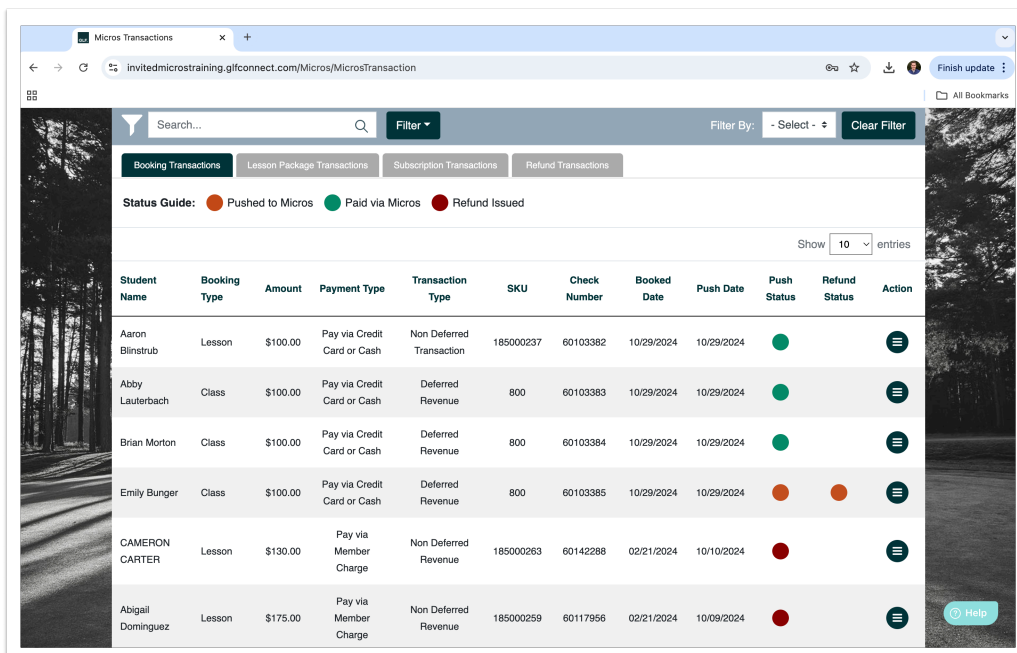


3. **Unused Lesson Package Charge:** This charge pertains to a lesson package purchased via the Coaching Store, where the lesson credits included in the package have not been utilized.
4. **Partially Used Lesson Package Charge:** This is the initial charge for a lesson package from the Coaching Store where some lesson credits have been used. The remaining credits will be refunded.



The Micros Transactions Screen serves as the central hub for tracking the status of transactions pushed to the POS including refunds. There are a number of actions that can be performed and display of important information allowing users track the status of refunds and access to additional information. The main features includes:

- **Refund Status Column - A** “Refund Status” column is visible on the booking, lesson package, and subscription tabs. This column displays the traffic light status of each transaction in relation to any refunds issued. This column will be blank when a refund has not been requested, Orange will display when a refund request has been pushed and Green will show when the refund has been issued:



- **Refund Menu Option** - Users with the appropriate rights can now initiate a refund for the initial charge directly from any of the tabs via the action menu option:

The screenshot shows a table with the following columns: Check Number, Booked Date, Push Date, Push Status, Refund Status, and Action. The first row is highlighted, and an action menu is open over it, showing 'View Details' and 'Refund' options. The second and third rows have green circles in the Push Status column, indicating they are refunded.

Check Number	Booked Date	Push Date	Push Status	Refund Status	Action
60103382	10/29/2024	10/29/2024			View Details Refund
60103383	10/29/2024	10/29/2024	●		
60103384	10/29/2024	10/29/2024	●		

- **Refunded Transactions Tab** - When a refund request is sent for a transaction, users can check its status and view further details in the Refund Transactions Tab. This tab provides key information, such as the refund check number, the original push check number and the traffic light status as well as the Refund Push date. Users can also cancel the refund request and view additional details related to both the refund and the original charge via the action menu icon:

The screenshot shows the 'MICROS TRANSACTIONS' web interface. The 'Refund Transactions' tab is selected. The table displays the following data:

Student Name	Booking Type	Amount	SKU	Refund Check Number	Refund Push Date	Push Check Number	Refund Push Status	Action
Emily Bunger	Class	\$-100.00	800	60103408	10/31/2024	60103385	●	

The interface also includes a search bar, filter options, and a status guide: ● Refund Pushed to Micros, ● Refunded via Micros.

Refund Restrictions

There are certain system restrictions in place restricting a refund from being issued. These include:

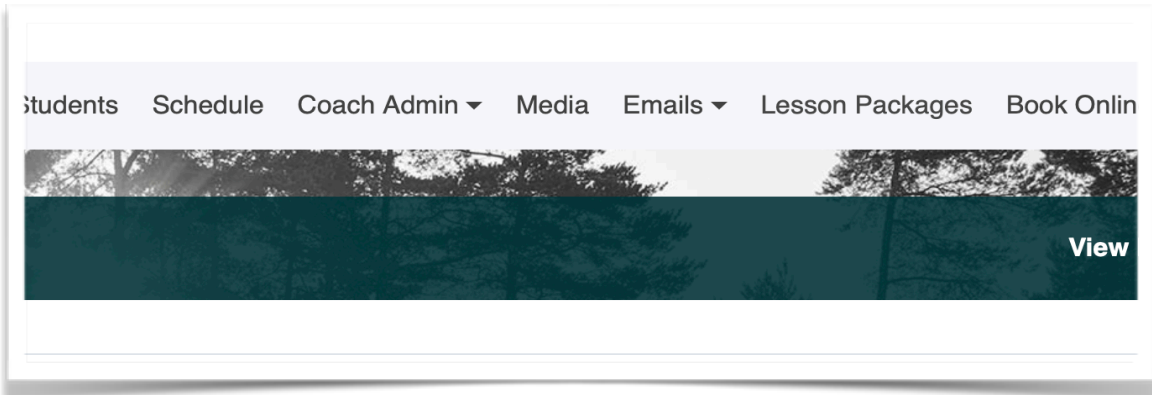
1. **Closed on Micros** - Refunds can only be issued for transactions which have a Closed on Micros (Green) status.
2. **Undelivered Class Revenue Only** - Refund can only be issued for class revenue transactions i.e the initial charge when the delivered status for any sessions within the class has not yet having been pushed. Once the delivered checks are pushed to the POS, and therefore funds deducted from the Balance Sheet Account a refund cannot be issued.

The process for pushing across refunds to the POS for the various transaction types is outlined in the Managers SOP Manual.

If you need the ability to issue refunds on your account, please reach out to the Invited Support Team at invitedsupport@glfconnect.com.

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:



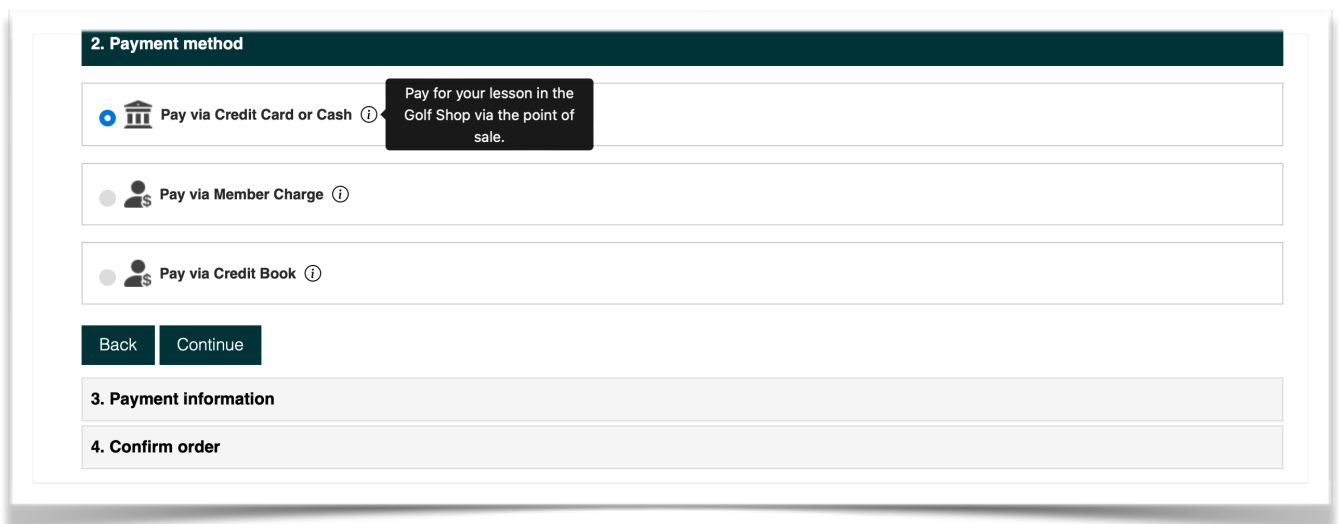
- **Step 1 - Select a Student**

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.



- **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:



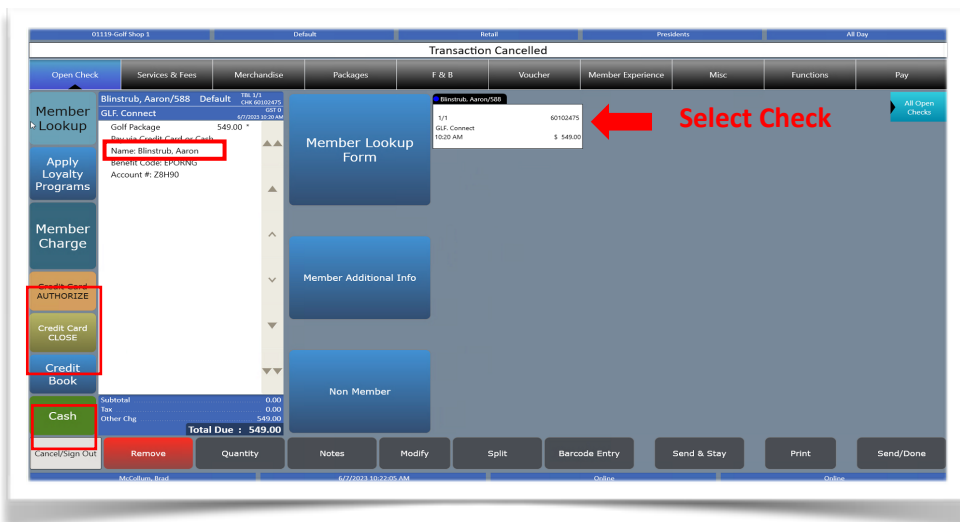
On confirming, the package will be pushed immediately to Micros and will appear on the Micros Transactions screen under 'Lesson Packages' tab:

Lesson Package Transactions									
Status Guide: ● Pushed to Micros ● Paid via Micros									
Show <input type="text" value="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	●	

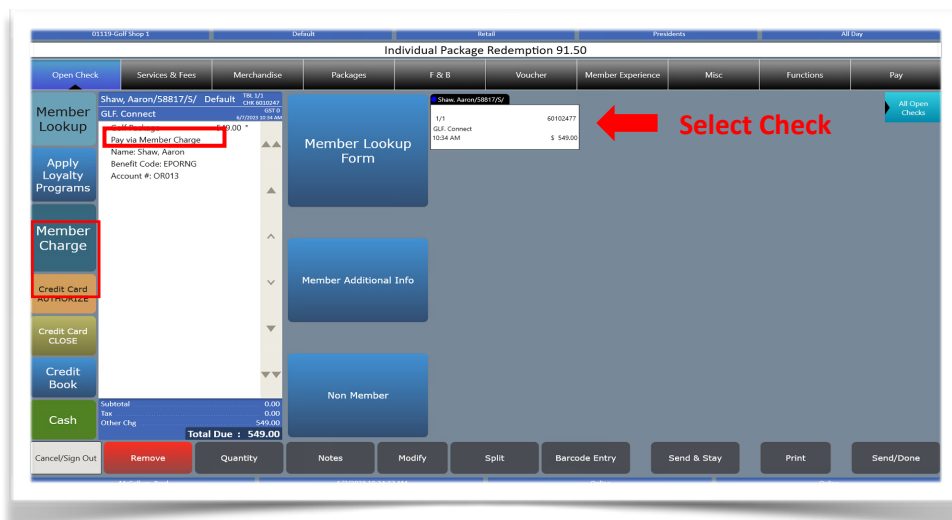
Step 3 - Close on Micros

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

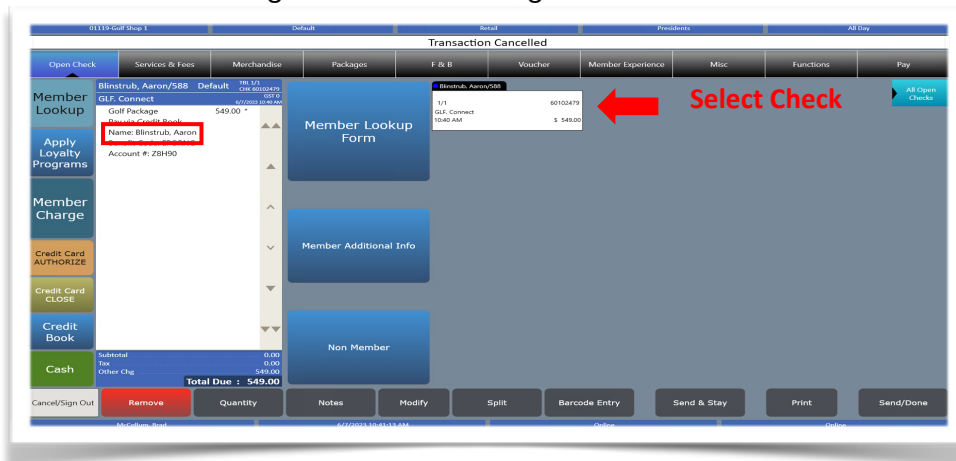
- ✓ **Pay via Credit Card or Cash** - You should expect the student to come into the Golf Shop to pay for the package and then charge out to credit card or cash:



- ✓ **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.



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:

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 x 1 Hour Lessons at a price of \$549.00 which has then deposited 360 instructing credits into their account:

Player	Email	Package Name	Purchase Date	Expiry Date	Coach	Lesson Credits	Balance	Action
<input type="checkbox"/> Aaron Blinstrub	invitedtraining@training.com	2 Month Bronze Program - 6 Hours	05/04/2023	07/04/2023	Brad McCollum	360	300.00	⋮

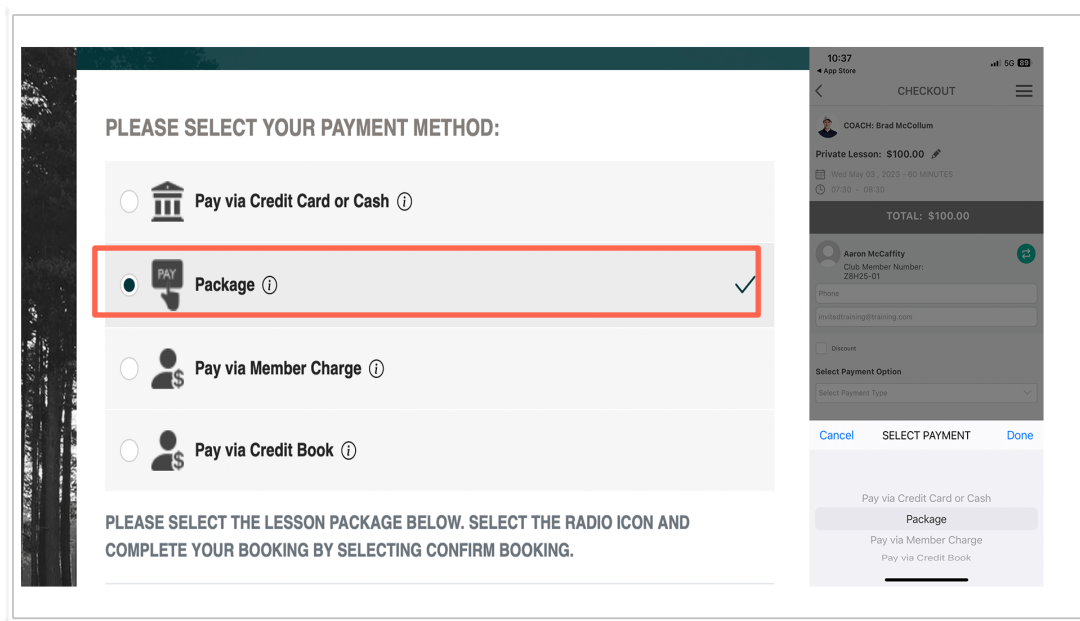
Applying Package Credits to a Booking

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.

Please note that If a refund has been requested for a Lesson Package, the credits will no longer be available in the students account to apply to lessons. If a refund request for the lesson package is cancelled, then the credits will show as available in the students account.

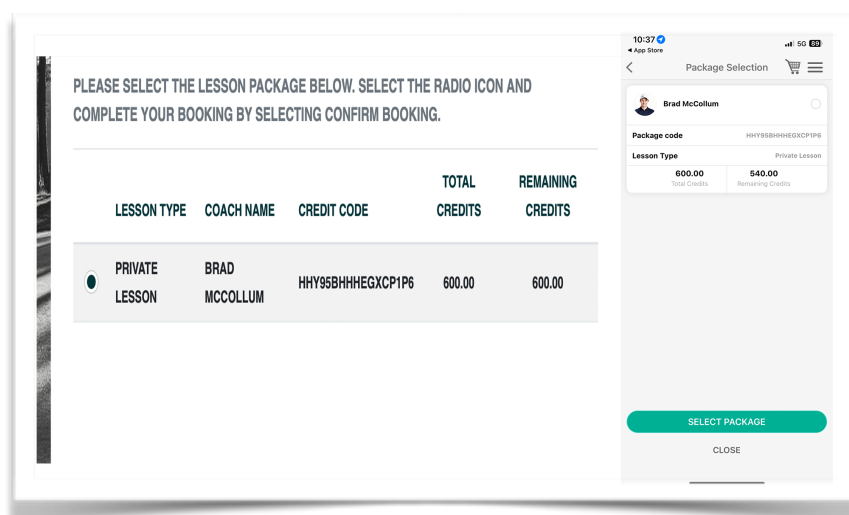
- Step 1 - Select Package Payment Methods**

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

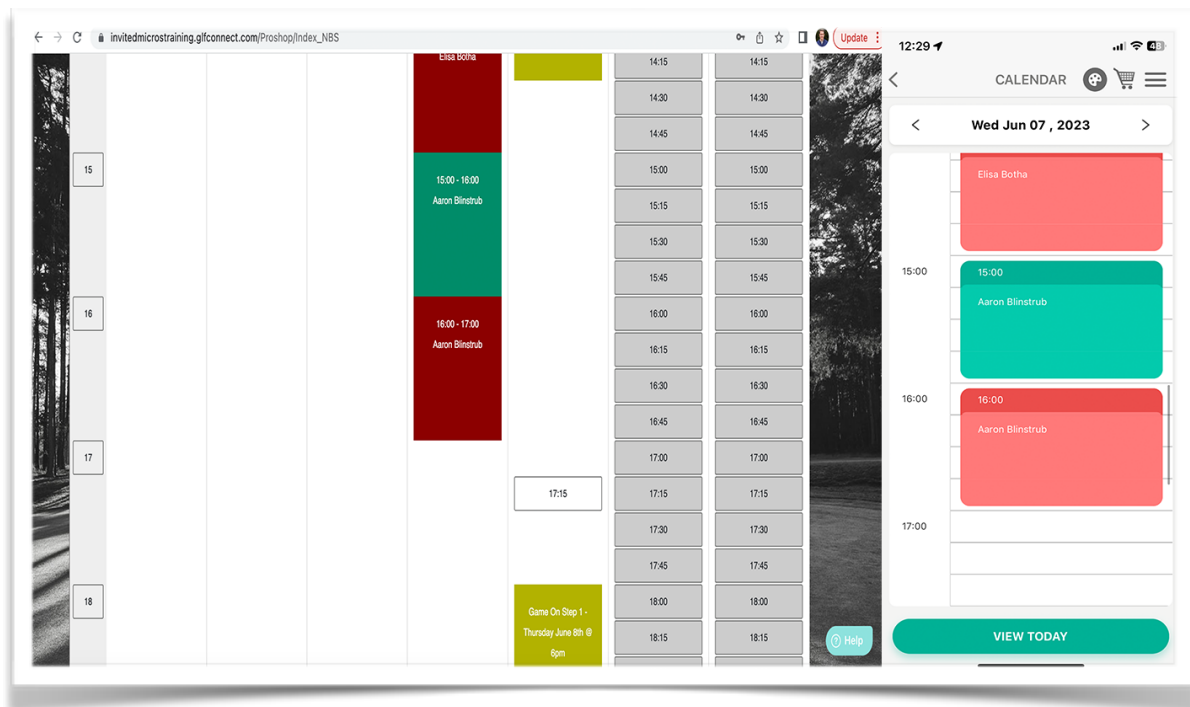


- Step 2 - Apply Credits to the Booking**

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.



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								
<input type="checkbox"/>	Player	Email	Package Name	Purchase Date	Expiry Date	Coach	Lesson Credits	Balance	Action	
<input type="checkbox"/>	Aaron Blinstrub	invitedtraining@training.com	2 Month Bronze Program - 6 Hours	06/07/2023	08/07/2023	Brad McCollum	360	300.00		

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.
- 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.

Closing Out a Private Lesson

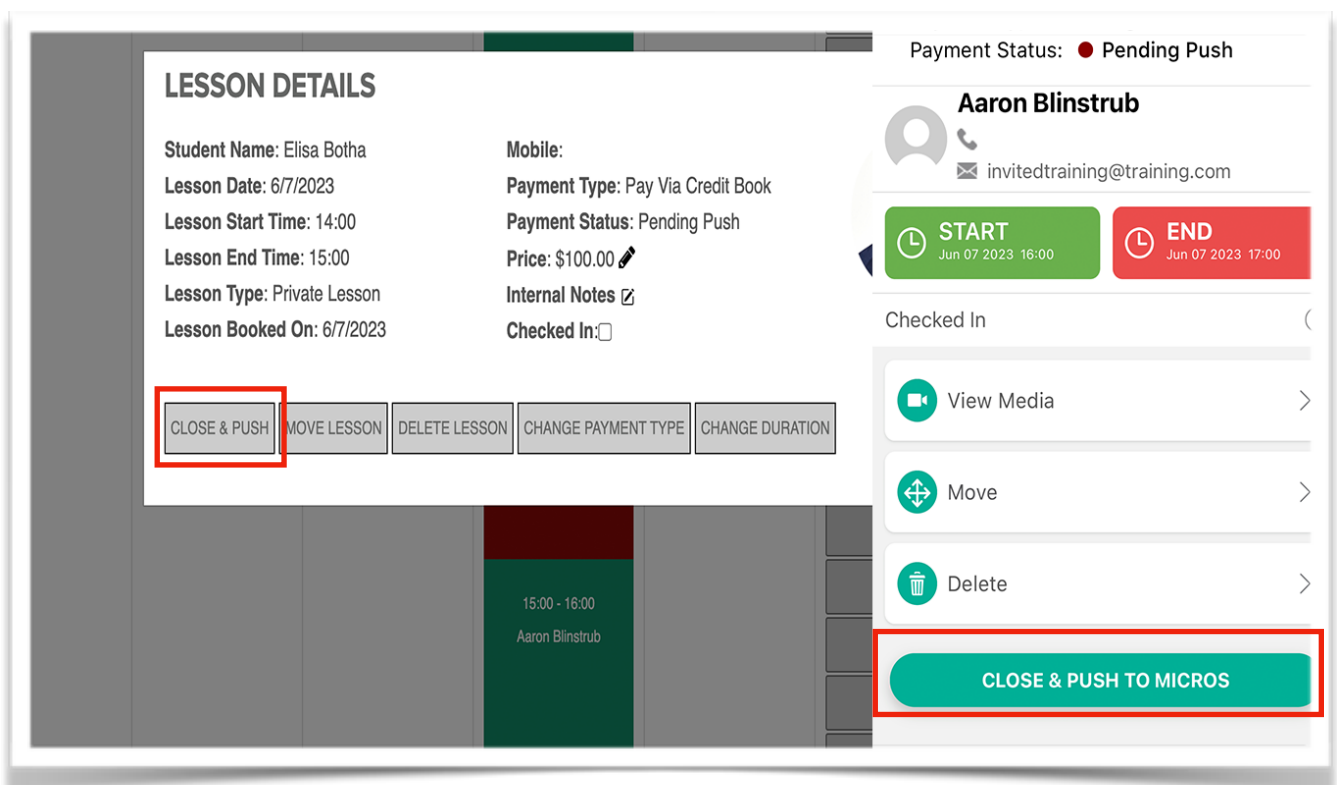
It is your responsibility to push a private lesson transaction from GLF using the correct payment preference once it has been delivered. Before pushing a transaction from GLF, we recommend you check the following:

- **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:

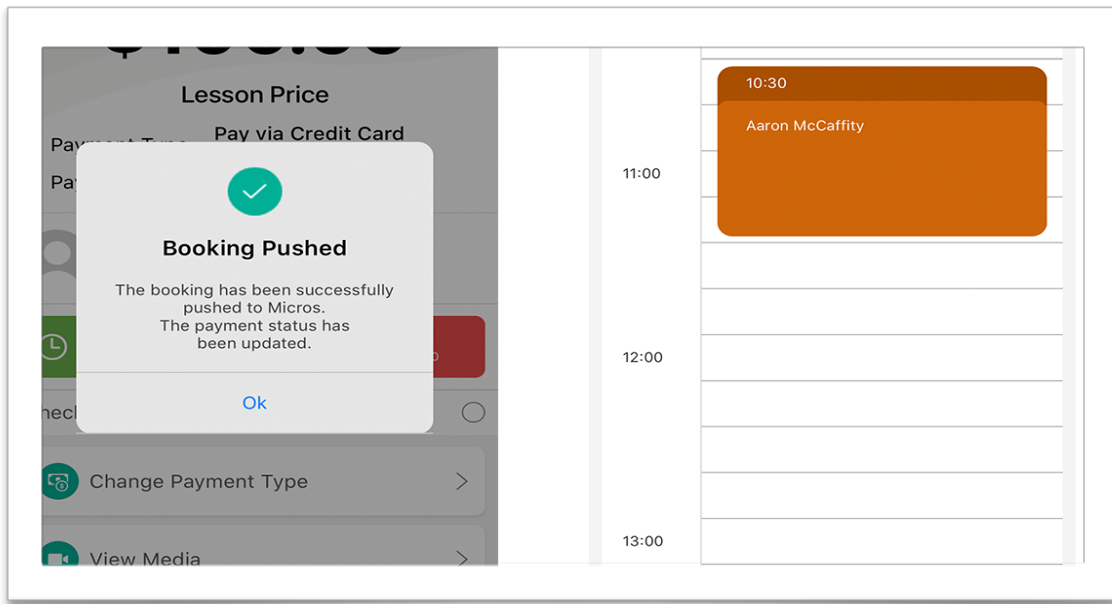
Step 1 - Close and Push

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



Please Continue on the next page

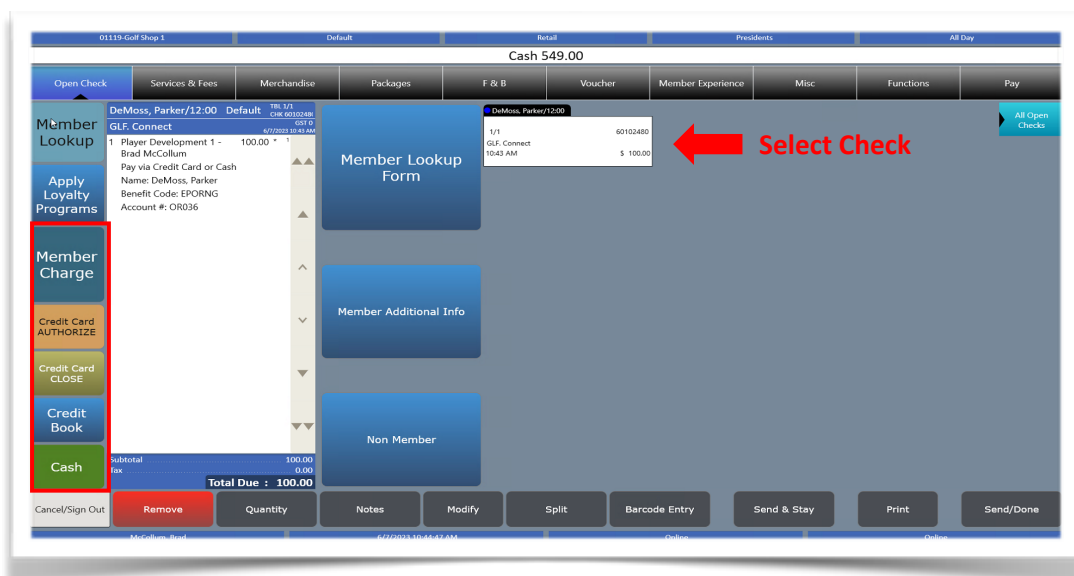
If the push is successful, you will see a success alert and the booking will turn orange on the schedule view. It is at this point, that you cannot amend the booking and the transaction will need to be closed on Micros by the POS user.



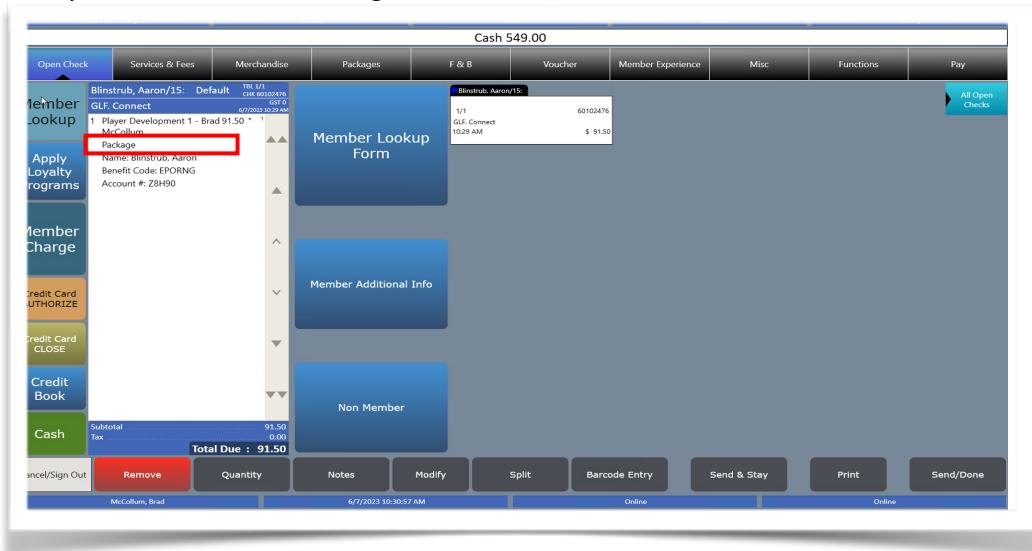
Step 3 - Close Out on Micros

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.



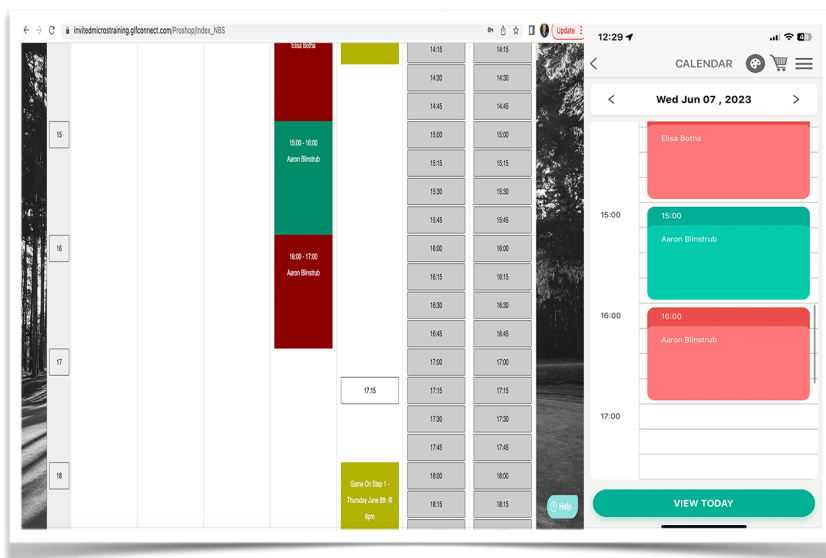
- **Pay Via Package** - Lessons tied to a package have already been charged to the member/guest and therefore the process is different whereby the funds need to be deducted from the Package Redemption Ledger. A lesson tied to a lesson package will appear on the check presentation as 'Package':



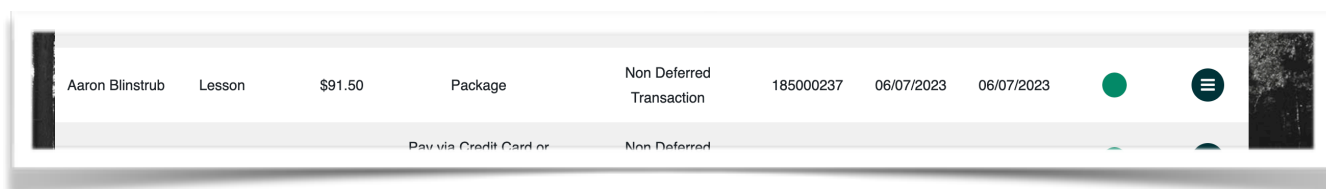
Move to the 'Pay' tab at the top of the POS. Select 'other payments' blue tab on the right. Select 'Package' Redemption to close the check to the package funds balance sheet account where funds were previous deposited when the lesson package was original purchased:



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:



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 mobile apps by instructors
- 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 instructors 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.



Refund Pushed:

This icon helps users identify the status of transactions for which a refund has been requested but not yet issued. When a refund is issued, the status of the initial charge will change to red (Pending Push). If the refund request is canceled, the initial charge status will revert to green (Closed on Micros).

The screenshot shows a web browser window displaying the 'CLASS DETAILS - Total Number of Attendees: 4' screen. At the top, there are buttons for 'Send Message to Attendees', 'Attendees', and 'Export Attendee'. Below this is a 'Status Guide' with four items: a red circle for 'Pending Push', an orange circle for 'Pushed To Micros', a red triangle with an exclamation mark for 'Refund Pushed', and a green circle for 'Paid Via Micros'. A table lists four attendees with columns for Player Email, Mobile No, Booked Date, Amount Paid, Payment Type, Revenue Push Status, Payment Date, Delivered Push Status, Checked In, and Action. The attendees are Abby Lauterbach (Green), Brian Morton (Green), Emily Bunger (Red with exclamation mark), and Jason Aster (Red). Below the table, class details are provided: Class Name: Game On Golf Experience Day - Saturday 2nd November, Starting At 2pm; Program Type: Game On; Coach: Brad McCollum; Date: 11/1/2024; Start Time: 14:00; End Time: 17:00; Description: Game On Golf Experience Day - Saturday 2nd November Starting At 2pm. At the bottom, there are buttons for 'Cancel', 'Add To Cart', 'Edit Class', 'Book', and 'Register'.

Player Email	Mobile No	Booked Date	Amount Paid	Payment Type	Revenue Push Status	Payment Date	Delivered Push Status	Checked In	Action
Abby Lauterbach	invitedtraining@tra... ni...	10/29/2024	\$100.00	Pay via Credit Card or Cash	Green	10/29/2024	Red	<input type="checkbox"/>	Menu
Brian Morton	invitedtraining@tra... ni...	10/29/2024	\$100.00	Pay via Credit Card or Cash	Green	10/29/2024	Red	<input type="checkbox"/>	Menu
Emily Bunger	invitedtraining@tra... ni...	10/29/2024	\$100.00	Pay via Credit Card or Cash	Red with exclamation mark	10/29/2024	Red	<input type="checkbox"/>	Menu
Jason Aster	invitedtraining@tra... ni...	10/29/2024	\$100.00	Pay via Credit Card or Cash	Red	--	Red	<input type="checkbox"/>	Menu

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**

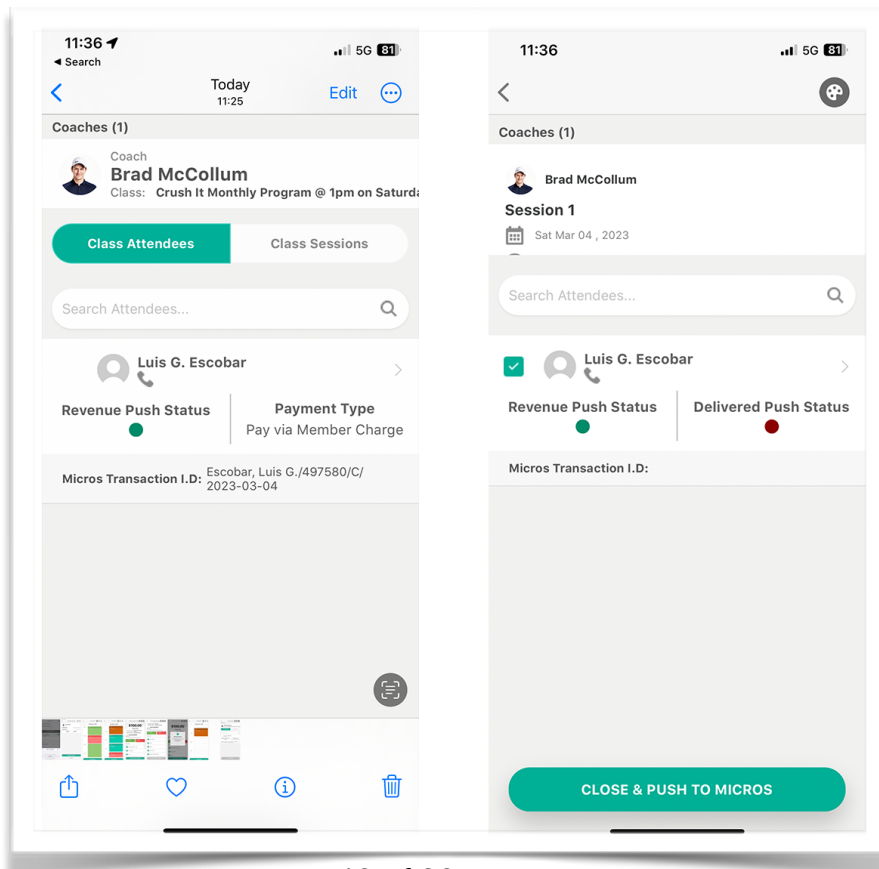
This is the amount that is to be paid by the member or guest when registering for the class:

- 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 an instructor, manager or Pro Shop user. Instructors 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 to departments 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 assigned to each instructor delivering a class session for the Golf Programming department allocation will be pushed to micros in a single check
- Class delivered checks will not be sent with the specific unique member identifier in the check but will display the members name
- When a portion of the revenue is assigned to Food and Beverage for a class a separate check tied to the F & B SKU will be sent



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.

Your 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 and how the price may be split across Golf Programming and additional departments such as Food and Beverage and/or Tennis.
- 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:

<input type="checkbox"/>	Devin Stine	invitedtraining@tra ni...	06/09/2023	\$100.00	Pay via Credit Book	●	--	●	<input type="checkbox"/>	☰
<input type="checkbox"/>	Jasmine Lance	invitedtraining@tra ni...	06/08/2023	\$100.00	Pay via Credit Card or Cash	●	06/08/2023	●	<input type="checkbox"/>	☰
<input type="checkbox"/>	Jonathan Fralick	invitedtraining@tra ni...	06/09/2023	\$100.00	Pay via Credit Card or Cash	●	--	●	<input type="checkbox"/>	☰
<input type="checkbox"/>	Nicolas Escobar	invitedtraining@tra ni...	06/09/2023	\$100.00	Pay via Member Charge	●	--	●	<input type="checkbox"/>	☰

Class Name: Half Day Golf School - Thursday June 8th @ 2pm Program Type: Clinics
Coach: Brad McCollum Date: 6/8/2023

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 F and B assigned to the class price?** If you are running a class where Food and Beverage is taking a proportion of the class price you need to ensure this allocated in the class builder.
- **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.

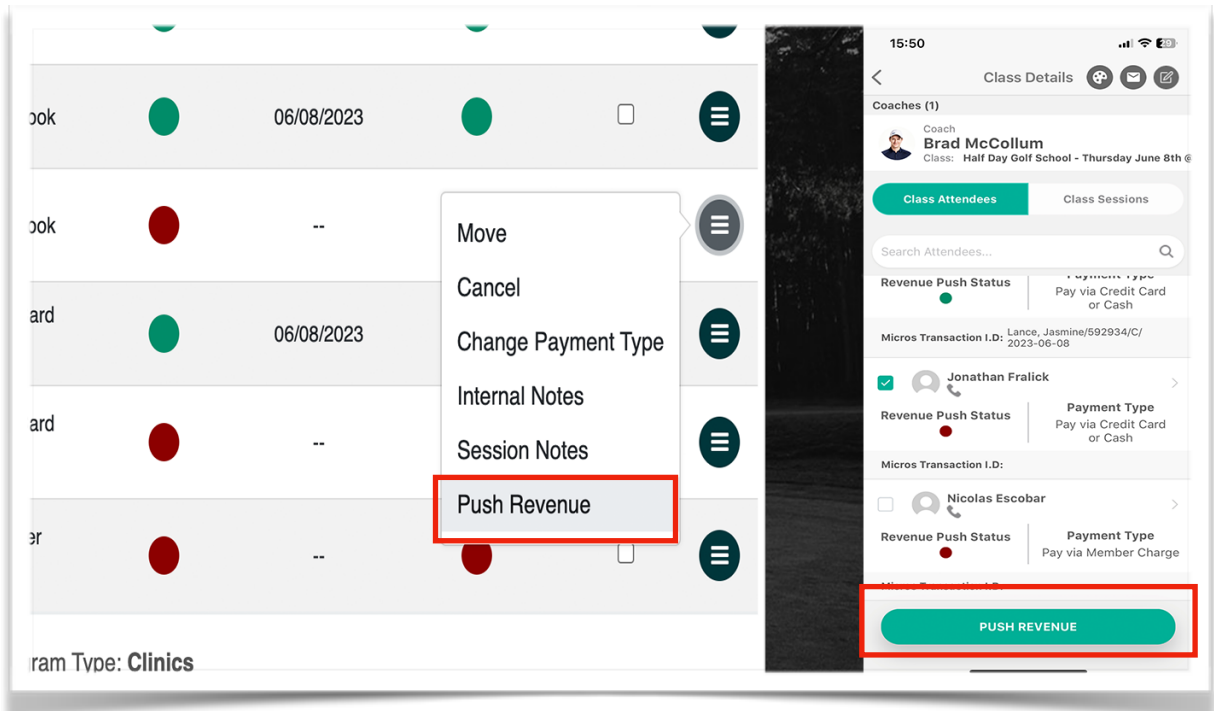
Please Continue on the next page.

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:

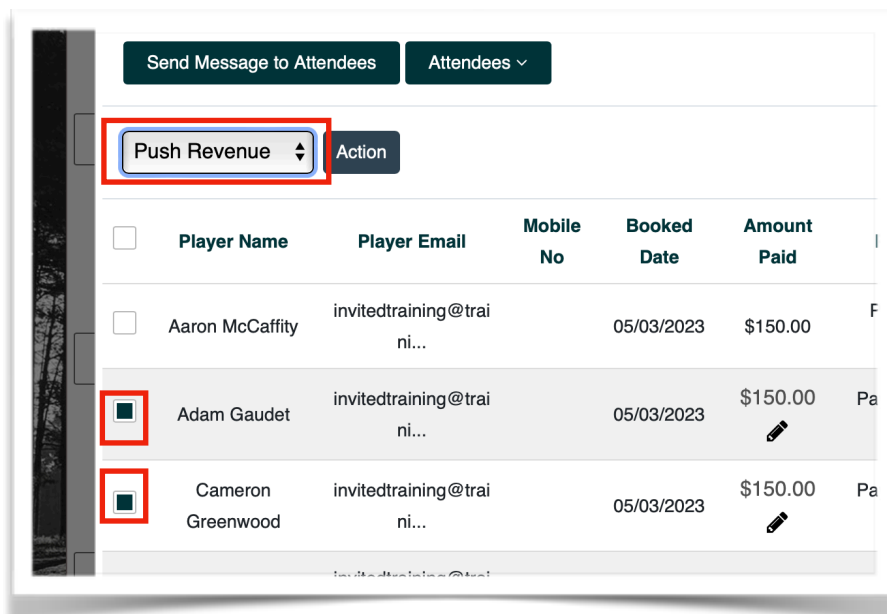
- **Selecting a Single Student:**

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:



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 instructors.

The image shows two overlapping screenshots from a mobile application. The background screenshot is a 'Class Details' screen for a class with 4 attendees. It features a table with columns for 'Player Email', 'Mobile No', 'Booking Date', 'Payment Date', and 'Delivery Status'. The table contains four rows of data, with the last two rows showing a payment of \$150.00 made via credit card or book on 05/03/2023. A large white modal box with a dark green checkmark and the text 'Push Successful! The booking has been pushed to Micros successfully and the status has been updated.' is centered over the table. A smaller, semi-transparent notification box in the foreground on the right says 'Revenue Pushed' and 'The revenue has been successfully pushed to Micros. The revenue status has been updated.' with an 'Ok' button. The background screen also shows a 'Revenue Push Status' indicator that has turned orange.

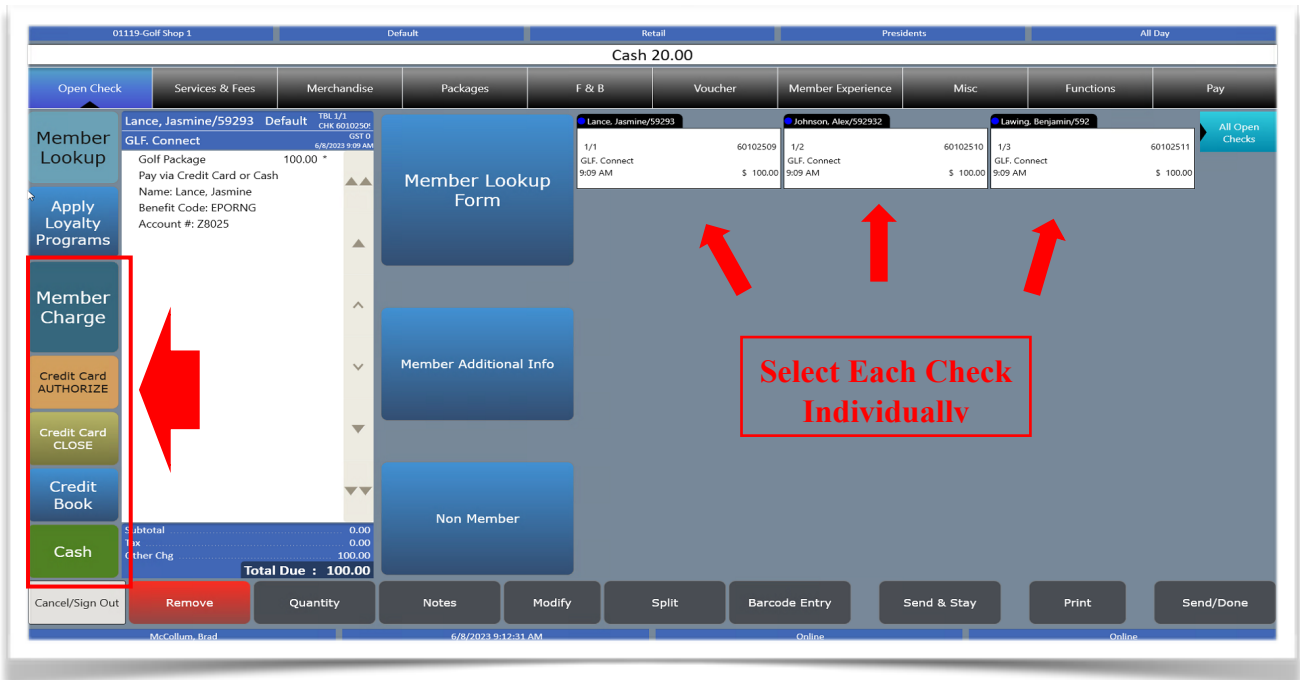
Player Email	Mobile No	Booking Date	Payment Date	Delivery Status
itedtraining@tra ni...		05/03/2023		
itedtraining@tra ni...		05/03/2023		
itedtraining@tra ni...		05/03/2023	\$150.00	Pay via Credit Card or Cash
itedtraining@tra ni...		05/03/2023	\$150.00	Pay via Credit Book

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	Payment Date
Alex Johnson	invitedtraining@tra... ni...		06/08/2023	\$100.00	Pay via Member Charge	Green	06/08/20
Benjamin Lawing	invitedtraining@tra... ni...		06/08/2023	\$100.00	Pay via Credit Book	Green	06/08/20
Devin Stine	invitedtraining@tra... ni...		06/09/2023	\$100.00	Pay via Credit Book	Red	--
Jasmine Lance	invitedtraining@tra... ni...		06/08/2023	\$100.00	Pay via Credit Card or Cash	Green	06/08/20
Jonathan Fralick	invitedtraining@tra... ni...		06/09/2023	\$100.00	Pay via Credit Card or Cash	Red	--
Nicolas Escobar	invitedtraining@tra... ni...		06/09/2023	\$100.00	Pay via Member Charge	Red	--

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 Instructing 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 instructors are delivering a class session, the delivered amount will be sent as a single check based on the split assigned in the class builder in GLF.
- Any proportion of the revenue assigned to Food and Beverage will be sent as a separate check to the F and B SKU

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:

CLASS DETAILS - Total Number of Attendees: 3

Send Message to Attendees Attendees Export Attendee

Push Revenue Action Status Guide: Pending Push Pushed To Micros Paid Via Micros

<input type="checkbox"/>	Player Name	Player Email	Mobile No	Booked Date	Amount Paid	Payment Type	Revenue Push Status	Payment Date	Delivered Push Status	Checked In	Action
<input type="checkbox"/>	Amanda Zellner	invitedtraining@traini...		06/08/2023	\$200.00	Pay via Credit Book	●	06/08/2023	●	<input type="checkbox"/>	⋮
<input type="checkbox"/>	Ben Verel	invitedtraining@traini...		06/08/2023	\$200.00	Pay via Member Charge	●	06/08/2023	●	<input type="checkbox"/>	⋮
<input type="checkbox"/>	Jason Aster	invitedtraining@traini...		06/08/2023	\$200.00	Pay via Credit Card or Cash	●	06/08/2023	●	<input type="checkbox"/>	⋮

Class Name: Game On Step 1 - Thursday June 8th @ 6pm Program Type: Game On Learner Program
Coach: Brad McCollum Date: 6/15/2023
Start Time: 18:00 End Time: 19:30
Description: Game On Step 1 - Thursday June 8th @ 6pm

Cancel Add To Cart Edit Class BOOK Register

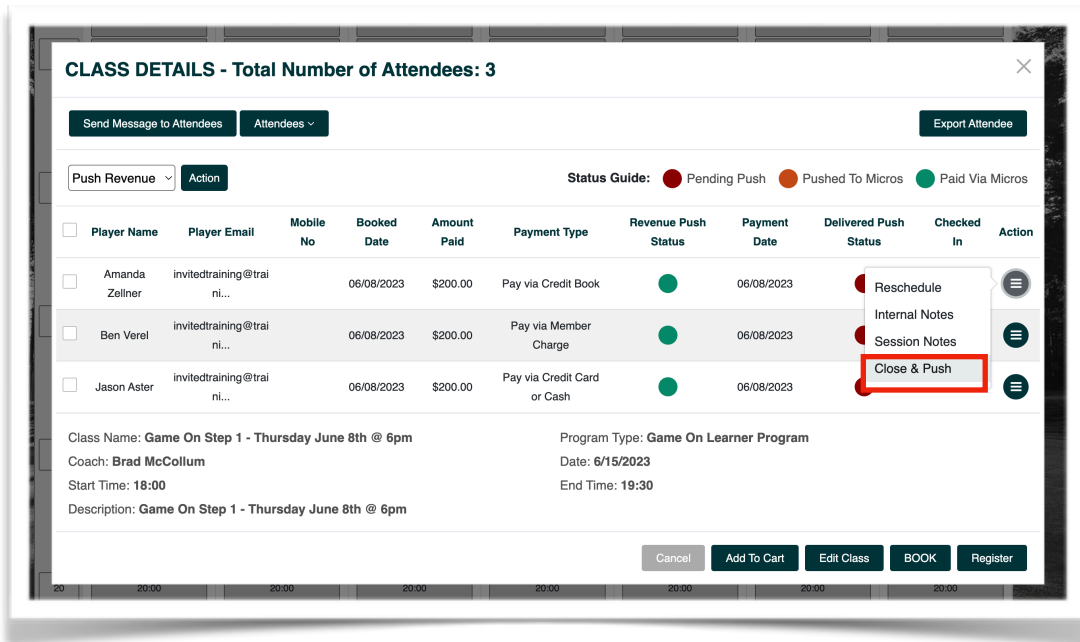
To close a class session for single or multiple students follow the steps below:

- **Step 1:**

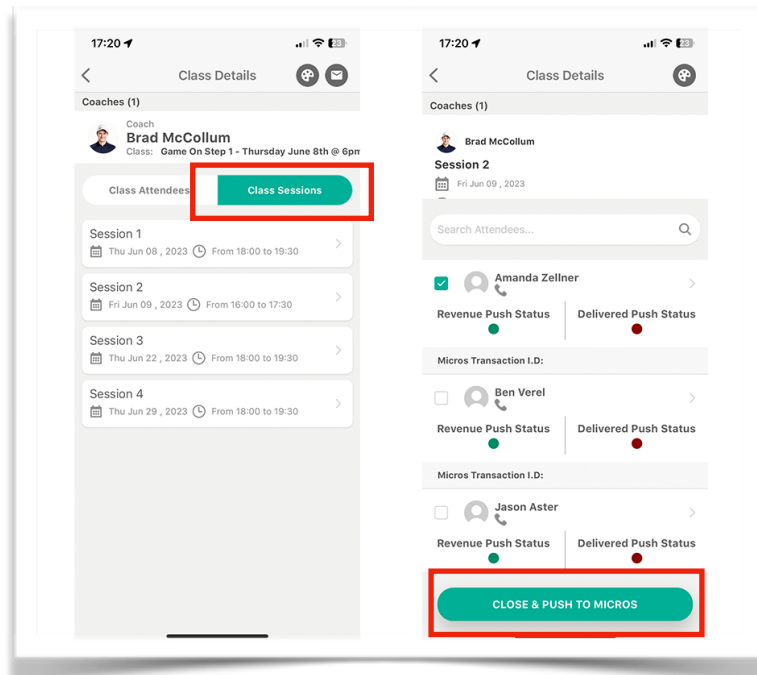
From the class details screen (on the web) or the class appointment screen (mobile apps), select the student you require:

- **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:

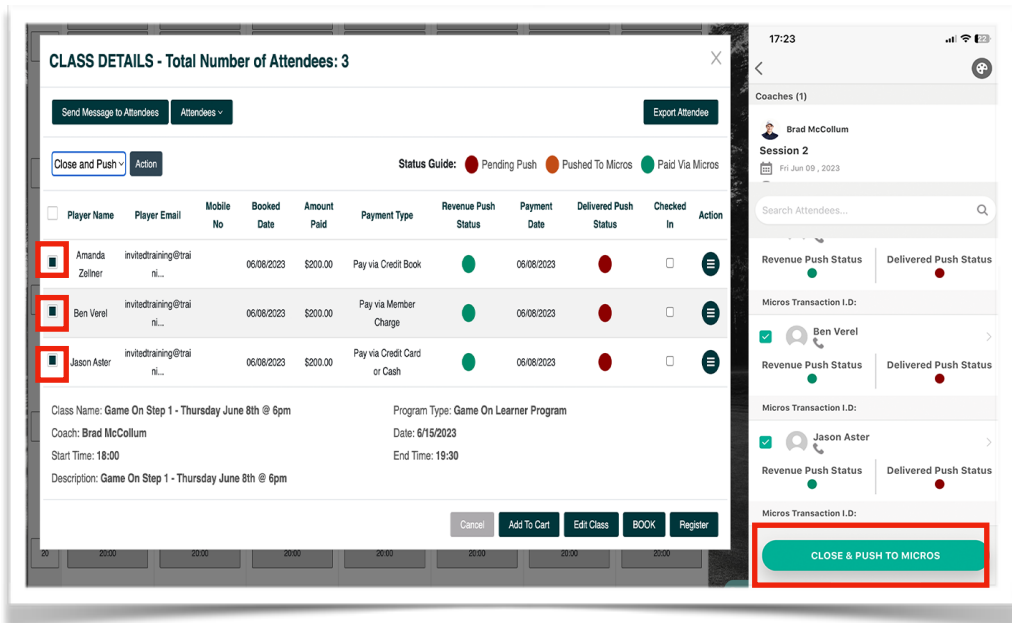


On the mobile app, you can select the 'Class Sessions' tab on the class appointment screen. From here, you should select the session you require to see a list of students. You can then select single or multiple students in the class:



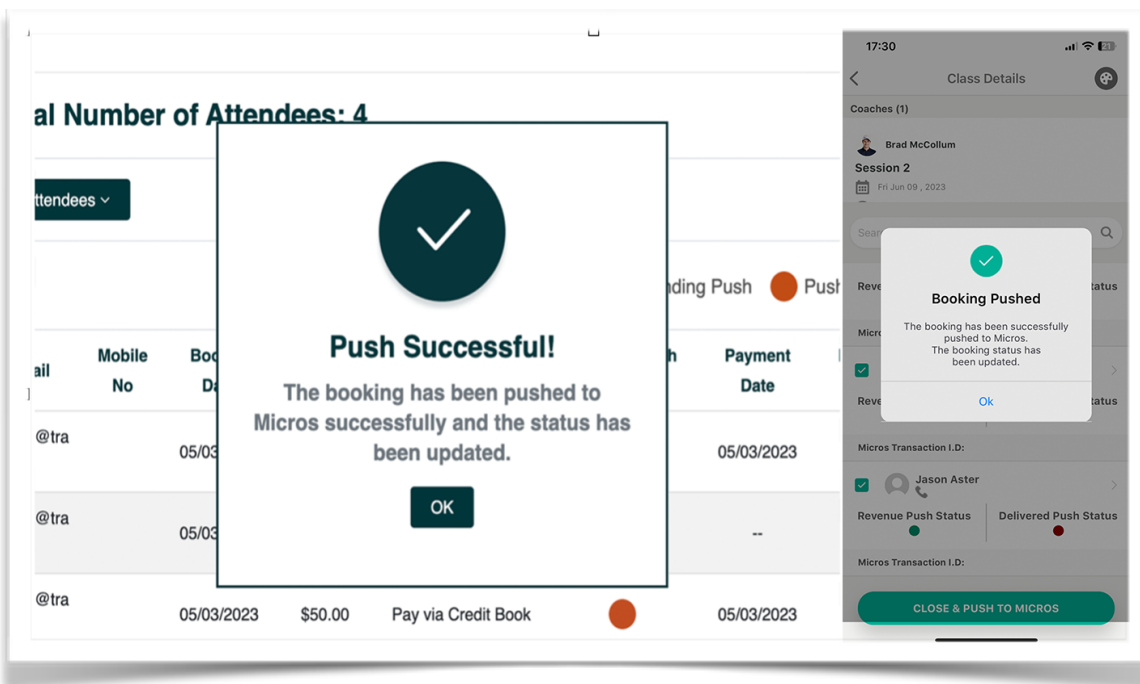
- **Selecting Multiple Students:**

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.



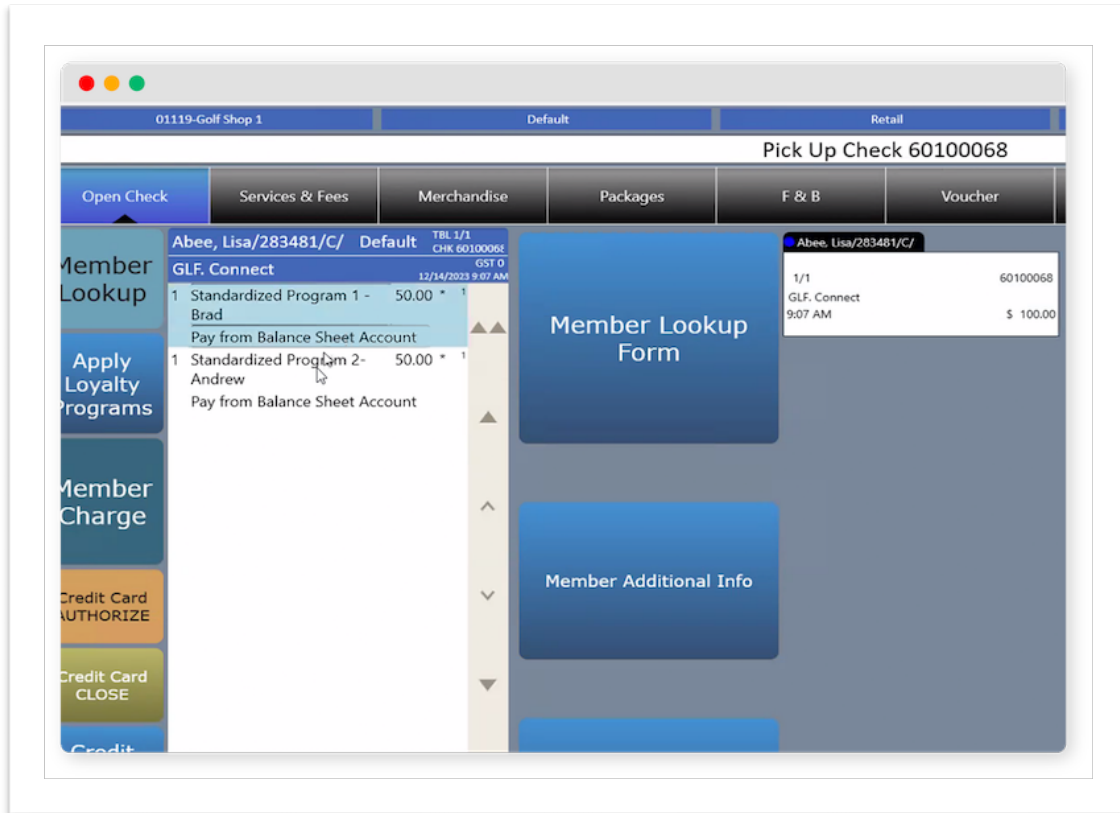
If you make any errors in the class revenue transaction then it the best practice procedure to 'Cancel the Push' from the Micros Transaction screen or via the Mobile Apps for instructors.

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 single check will appear on the check presentation for each student even when there may be multiple checks for each student if multiple instructors have delivered the class session. In the example below a single check has been sent for the Student with each instructor assigned as 50% of the revenue.



Please Continue on the next page.

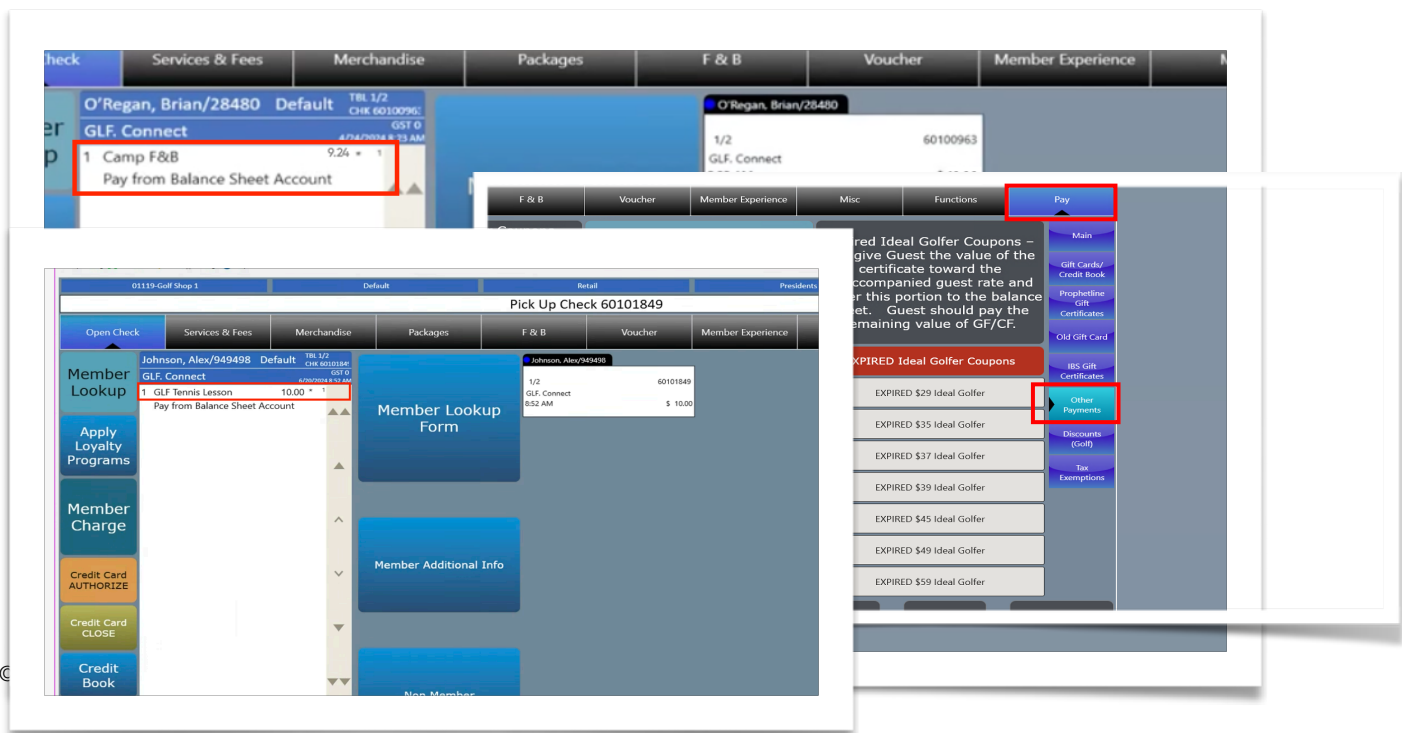
Move to the 'Pay' tab at the top of the POS. Select 'other payments' blue tab on the right. Select 'Pay from Balance Sheet Account' to close the check to the balance sheet account where funds were previous deposited when the class revenue was original purchased:



Closing Other Department Checks

When a proportion of the class price and thus the revenue generated for a class session is assigned to additional departments such as Food and Beverage, a separate check will be also be sent for the value assigned. When the checks hits the POS this will be assigned to the department i.e Camp F and B on the check presentation screen. Importantly for the F&B and Retail Departments, the amount sent across will be the net value allowing the appropriate sales tax to be added automatically to the check to make up to the gross amount. Other Departments, such as Tennis will be sent as the gross amount added in the class builder as these departments are non taxable.

The POS user should follow the guidance on the check and Pay from the Balance Sheet as per the guidance above:



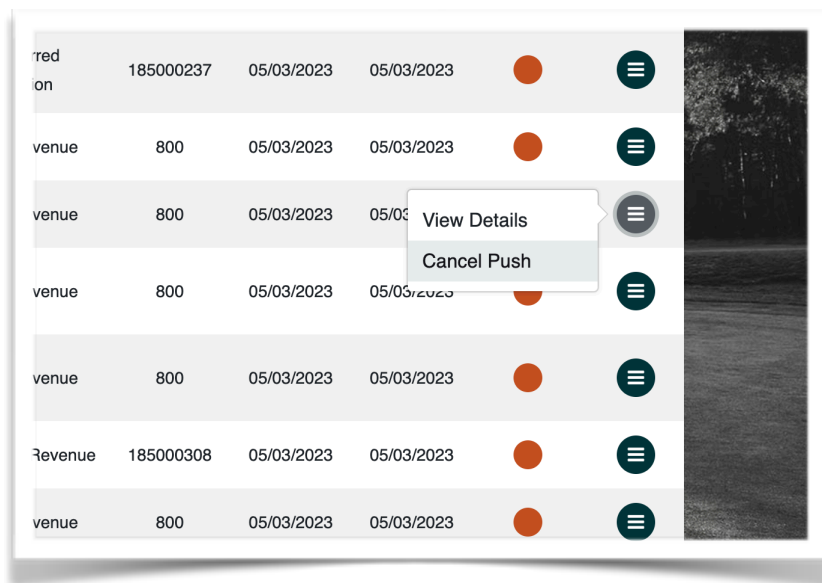
Canceling a Push

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

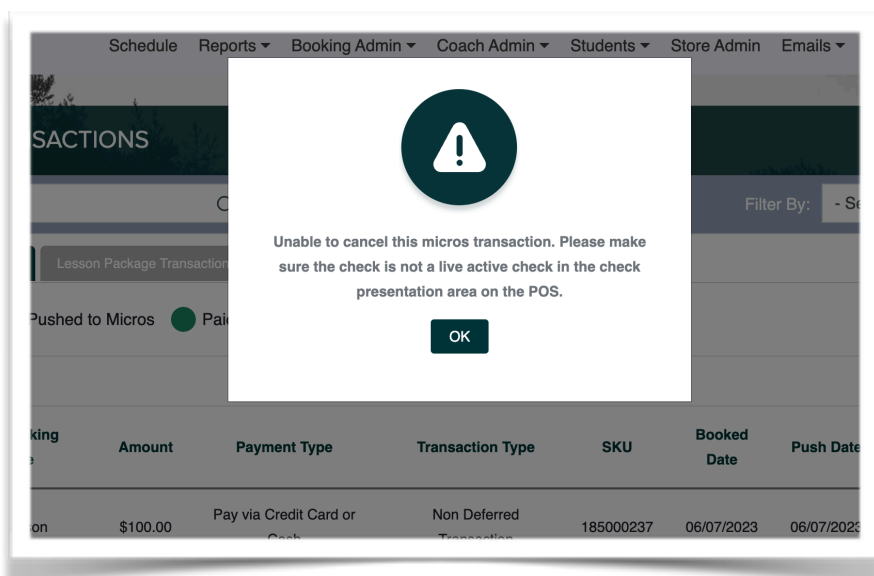
Canceling a Push on the Web

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.

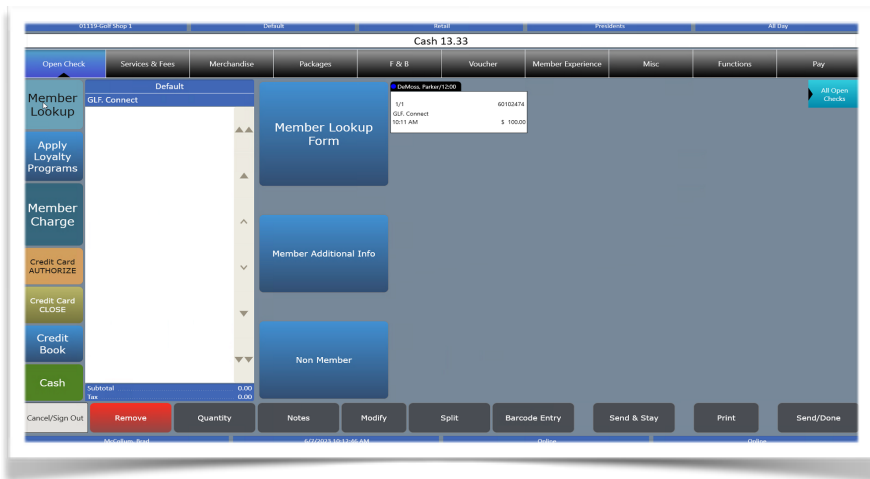
After finding the transactions within the specific tab, navigate to the action menu icon on the right hand side of each transaction row and select 'Cancel Push':



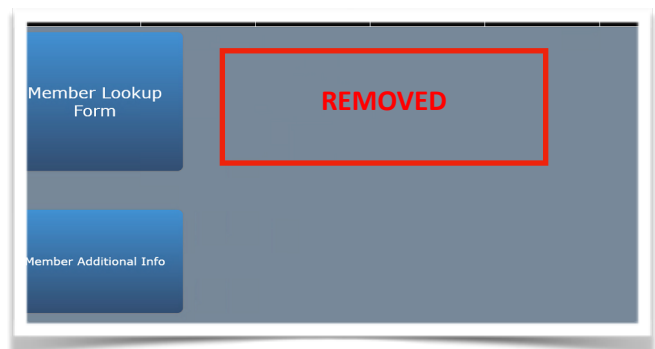
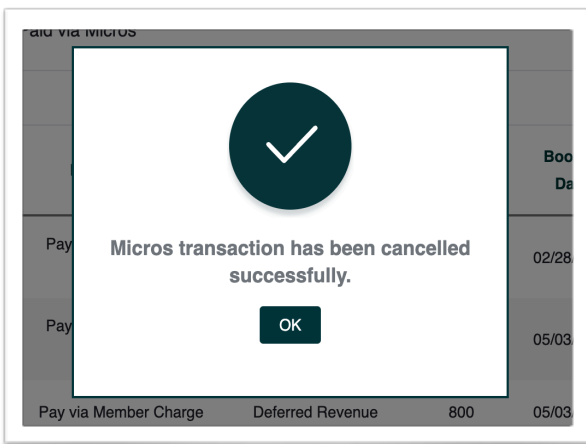
In order to Cancel the push of a specific transaction, the check should be visible on the Check Presentation Screen and not an open check. If the check is open then an error message will appear on GLF. When attempting to cancel:



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



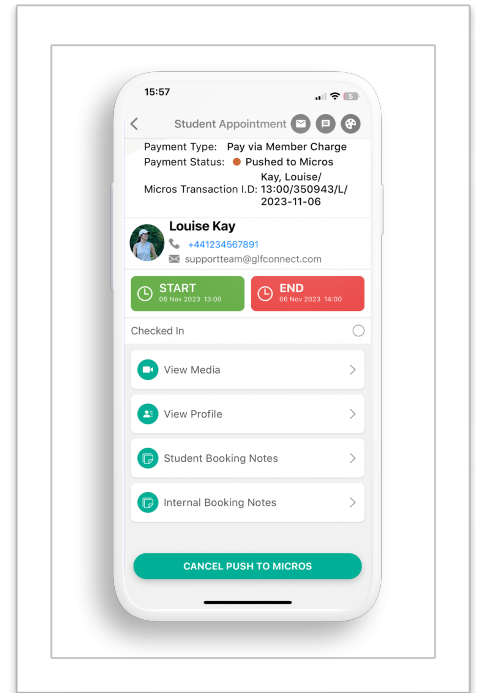
After selecting the option to 'Cancel the Push', a success message should appear and the transaction should disappear from the check presentation screen on the POS and the status return to Pending Push (Red) in the schedule view on GLF. The transaction will also be removed from the Micros Transactions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



Cancel Push for Mobile Apps

labelling a Private Lesson Push

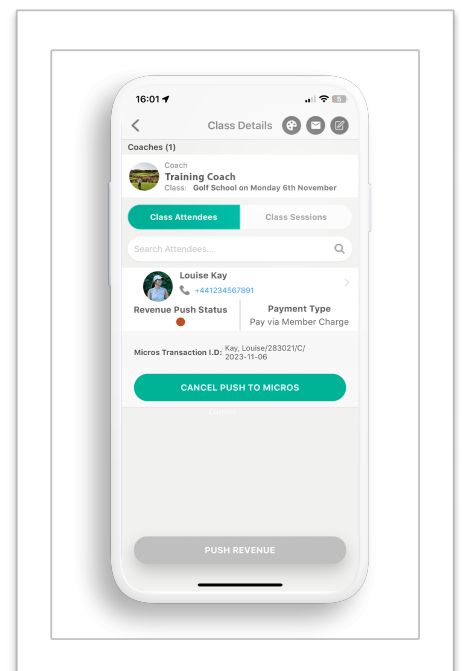
Via the schedule view, the user should select the booking showing the orange Pushed to Micros status. On the lesson appointment screen, the button will then appear showing the option to 'Cancel Push'. After a short period, an alert will appear advising that the push has been cancelled and status will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



labelling a Class Revenue and Delivered Push

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.

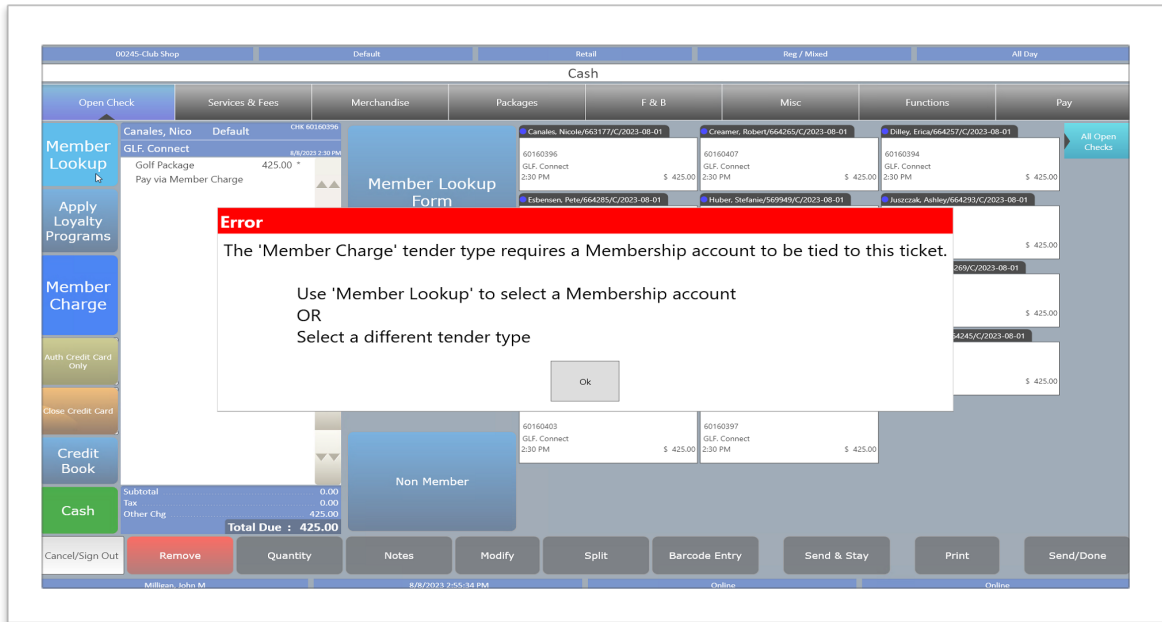


IMPORTANT

- 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.

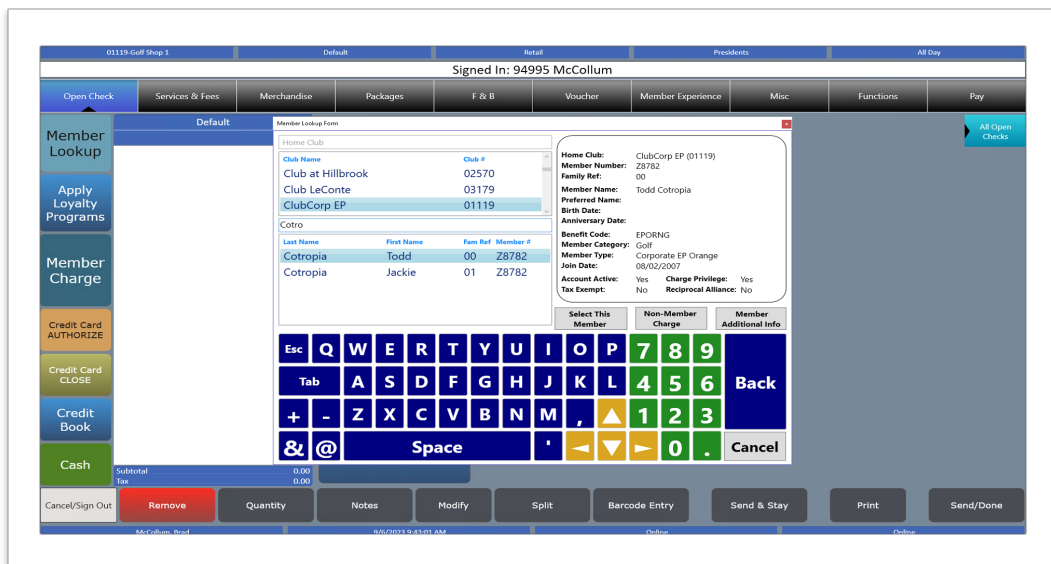
Linking Checks to Member Accounts

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:

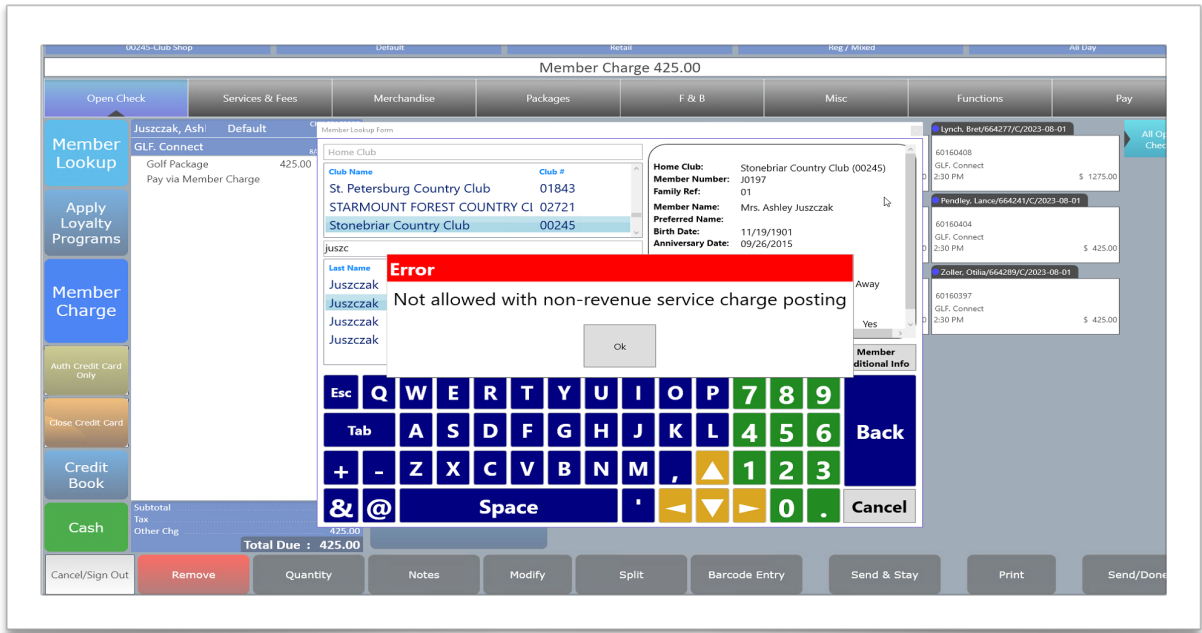


When you encounter this alert, click OK and you will then need to find the correct members account within Member Lookup.

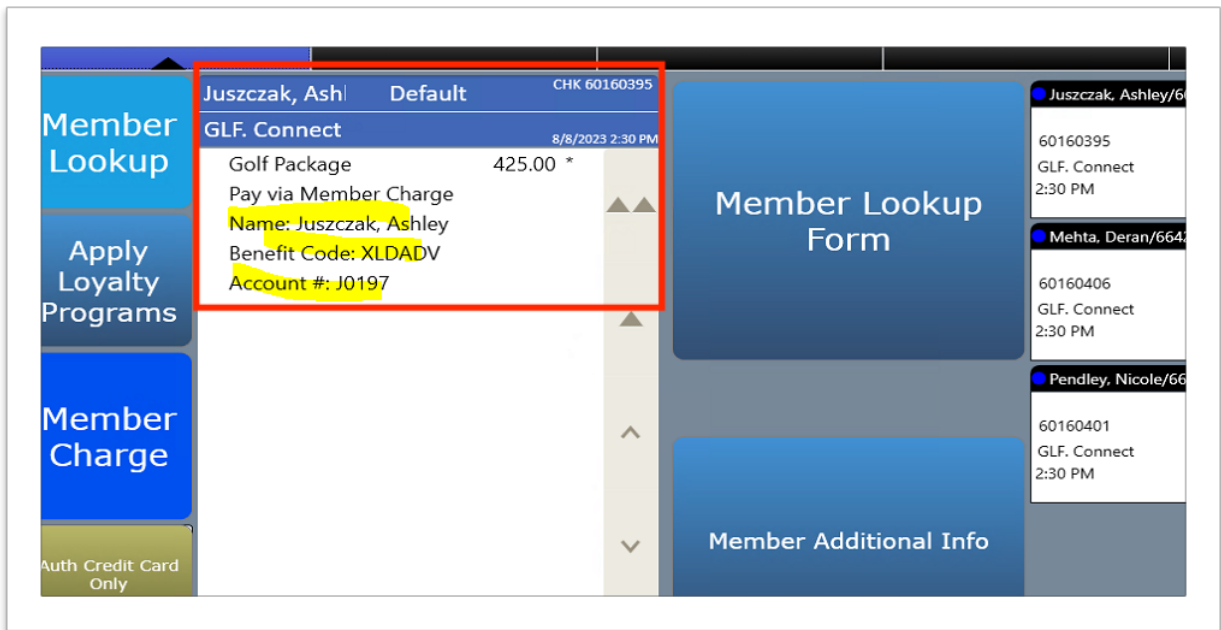
Select "Member Lookup" > Type in the Members Name that was not tied into the integration > Select this Member into the Check presentation to tie the account together:



After selecting the correct member you may encounter the message below and you can bypass this by clicking OK:



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:



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:

Please continue to the next page.

Open Check	Services & Fees	Merchandise	Packages	F & B	Misc	Functions	Pay
Member Lookup Mehta, Deran Default GLF, Connect Golf Package 425.00 * Pay via Member Charge Name: Mehta, Deran Benefit Code: XLD Account #: M0744	CHK 60160406 8/8/2023 2:30 PM	Member Lookup Form	Mehta, Deran/664269/C/2023-08-01 60160406 GLF, Connect 2:30 PM \$ 425.00	Mehta, Sumita/664273/C/2023-08-01 60160405 GLF, Connect 2:30 PM \$ 425.00	Pendley, Lance/664241/C/2023-08-01 60160404 GLF, Connect 2:30 PM \$ 425.00	All Ch	
Apply Loyalty Programs			Pendley, Nicole/664245/C/2023-08-01 60160401 GLF, Connect 2:30 PM \$ 425.00	Schumacher, Dennis/664261/C/2023-08-01 60160403 GLF, Connect 2:30 PM \$ 425.00	Zoller, Ottilia/664289/C/2023-08-01 60160397 GLF, Connect 2:30 PM \$ 425.00		
Member Charge							
Credit Card Only							
Credit Card							
Credit Book							
Subtotal 0.00							
			Member Add				
			Non Member				

Notification

STOP! The individual selected on this account has NO charge privileges

Cash or credit card is required for payment.

OK Cancel