Micros & GLF. Connect

Updated 11th January 2025

Managers Manual

Contents

Managing 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:

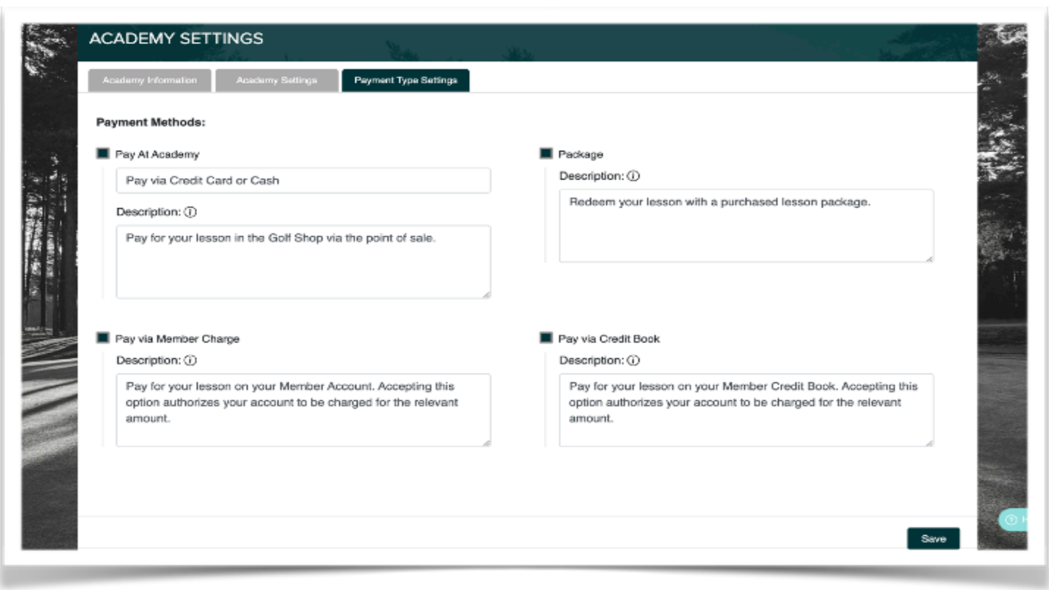
- **Pay via Credit Card or Cash**
  This payment preference is intended to be used when a member or guest intends to pay for their booking at the physical POS location, such as the golf shop. This payment preference will appear to both Members and Guests

- **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. The funds reside on the general ledger balance sheet account until the lesson, or portion of the program has been provided, to then recognize as EP/Department Revenue. The package is available as lessons 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.

You can manage the specific name of the Pay via Credit Card or Cash payment preference and the information that appears to users on the checkout screen via the Academy Settings and Payment Type Settings tab:

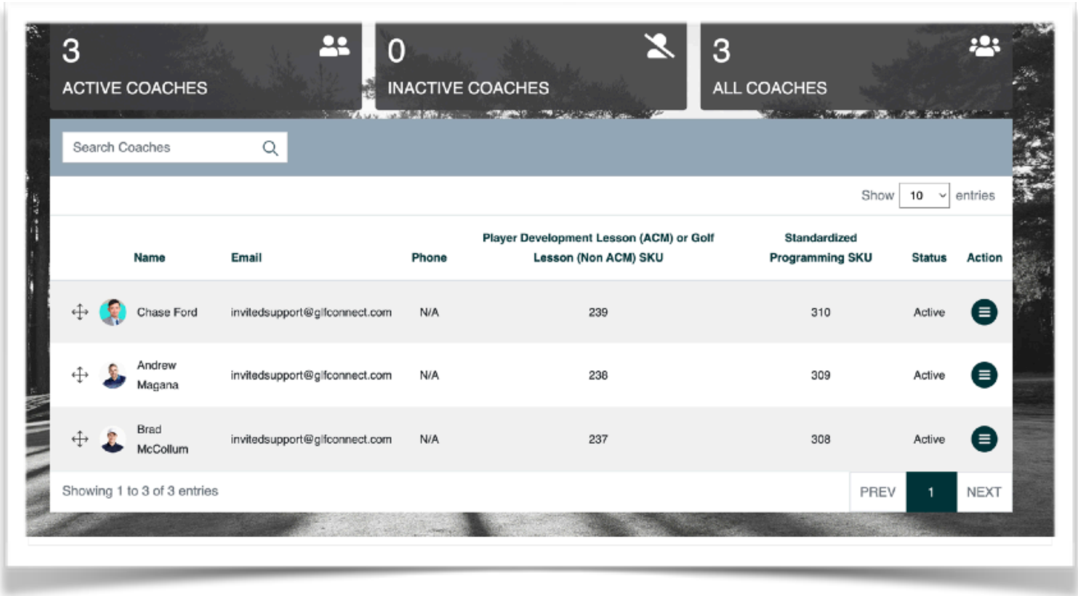


Managing Coach SKU Numbers

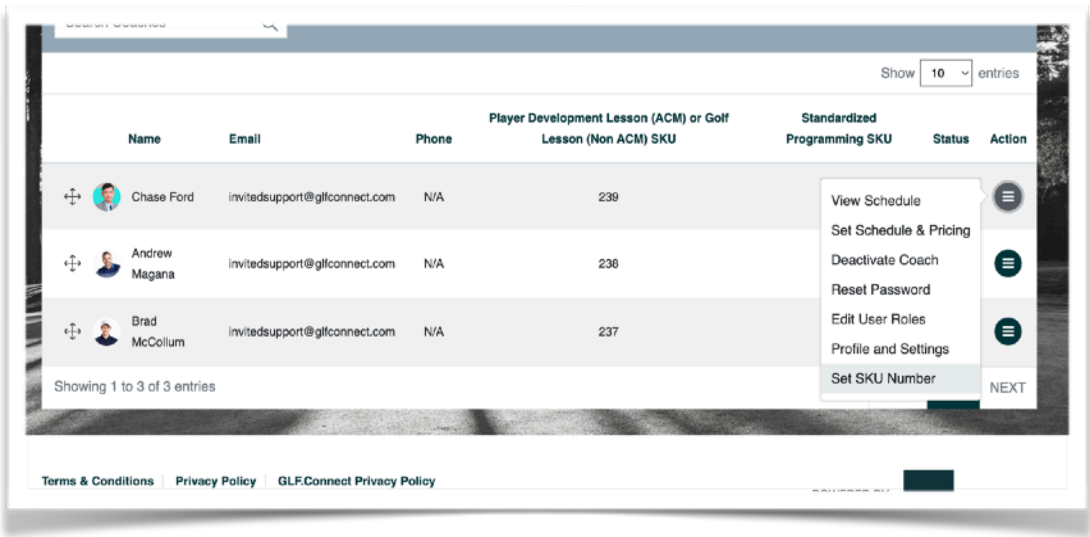
To push transactions from GLF. Connect to Micros, these need to be tied to specific coaches within GLF. In the coach management area, depending on your user access you can add SKU numbers and edit these for all of your active coaches. First, navigate to Coach Management and you will see two columns:

- **Player Development Lesson (ACM) or Golf Lesson (Non ACM) SKU**
  This is to be used for private lessons and is required to be a 3-digit number which is specific to MICROS billing for the specific instructor.

- **Standardized Programming SKU**
  This is to be used for group programing and is required to be a 3-digit number which is specific to MICROS billing for the specific instructor.



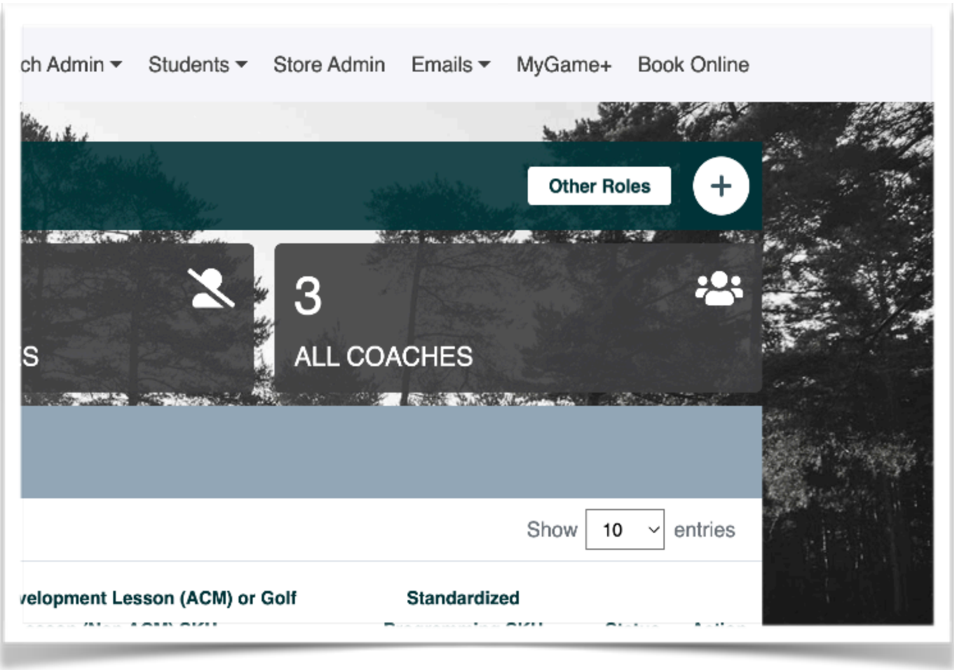
You may also be able to add and edit SKU Numbers when creating a coach or by selecting ‘Set SKU Number’ from the action icon:



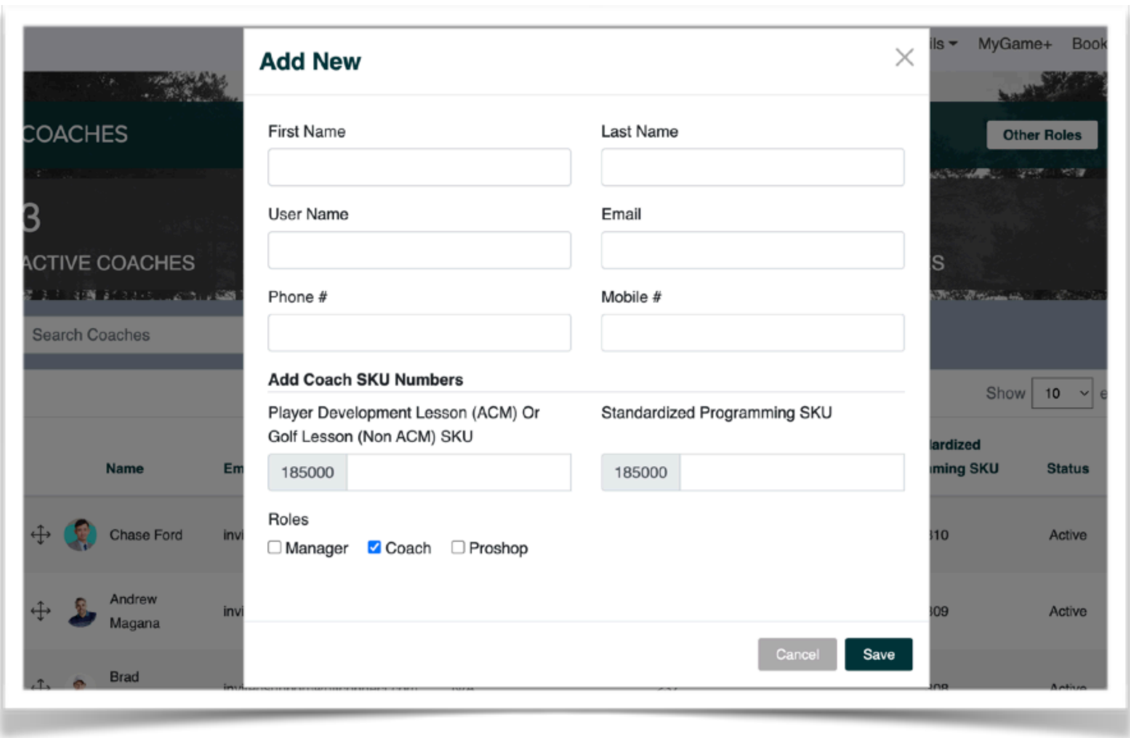
Adding a Coach

When a new instructor joins your coaching team, you may also be able to add them to GLF. Connect and assign the necessary SKU Numbers.

From within the Coach Management screen, the plus icon can be selected in order to add a new user:



A pop up will appear and there are several required fields. The SKU numbers need to be added to the fields that are provided:



Departmental SKU

In the class management feature on GLF, users can allocate a portion of the class price—and the resulting revenue—for each class session to seven different departments, which are listed below:

- Food and Beverage - Non Taxable
- Pickleball - Non Taxable
- Athletic - Non Taxable
- Tennis - Non Taxable
- Pool/ Swim - Non Taxable
- Retail - Taxable
- Payroll/Miscellaneous - Non Taxable

If you need the ability to assign revenue to any of these departments please contact Jennifer Bermingham on Jennifer.Bermingham@invitedclubs.com.

Finding SKU Number Information

To find the necessary EMC SKU information for each instructor please contact pointofsale@invitedclubs.com.

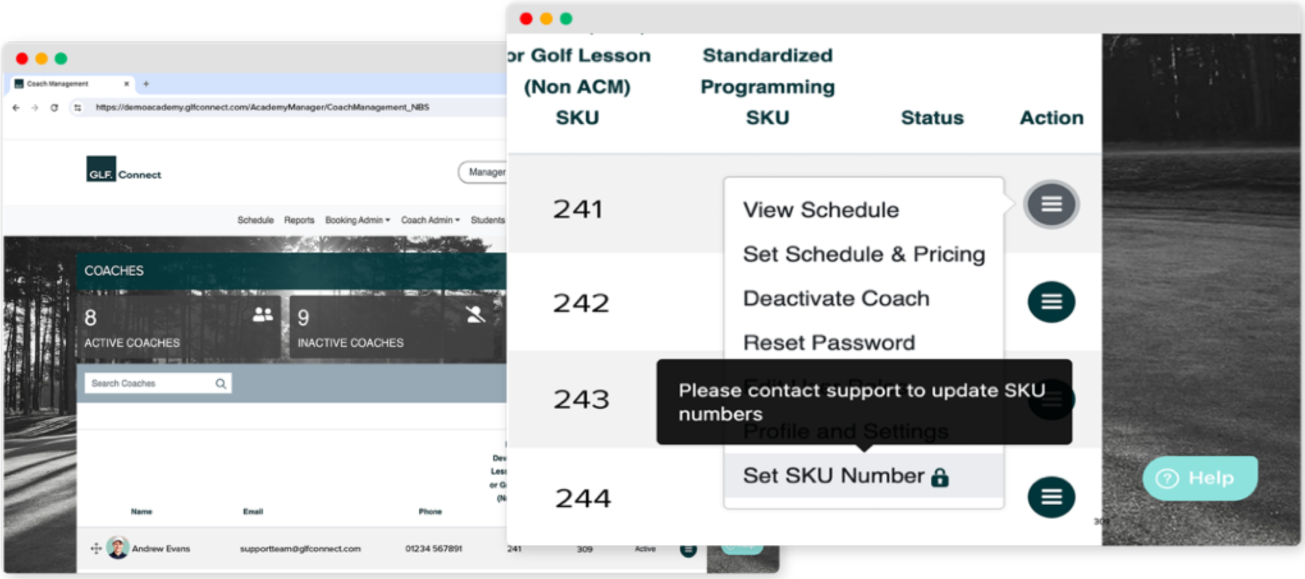
Provide each instructors FIRST NAME and LAST NAME, and they will provide the “last 3-digits” of the EMC SKU for the:

- PLAYER DEVELOPMENT LESSON, and
- STANDARDIZED PROGRAM LESSON SKUs tied to each.

These will be imputed into GLF. Connect for proper integration into the MICROS POS.

Restricted Access

If you do not have the correct access to perform these actions then you may see a restriction preventing you from adding coaches via the plus icon or editing SKU numbers via the action menu icon:



If you require a new account to be created or to edit a SKU Number within your GLF. Connect system please contact Jennifer Bermingham on Jennifer.Bermingham@invitedclubs.com.

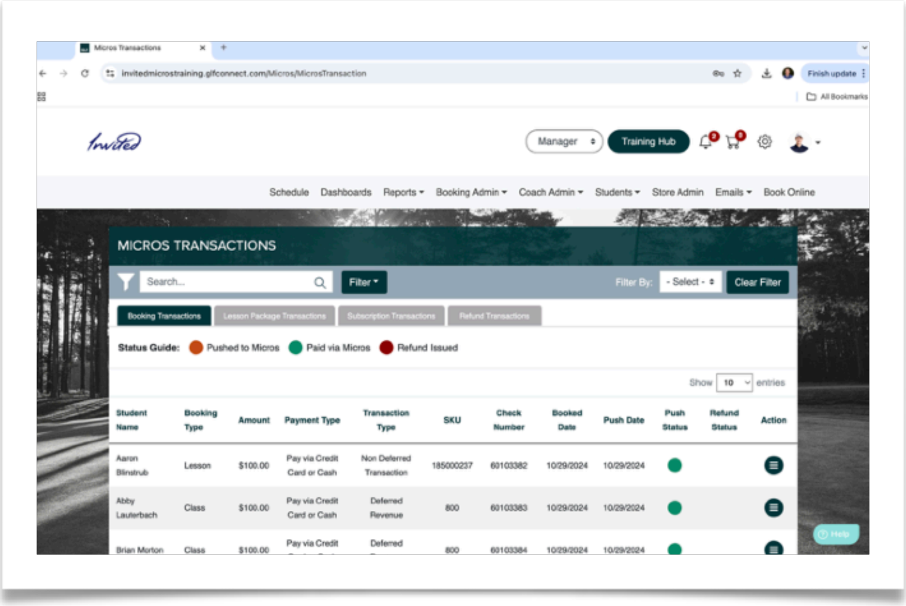
Refund Rights

Users can issue refunds for transactions only if they have the appropriate permissions within the system. These permissions have been granted to individuals at your facility who are responsible for processing refunds. Users without these permissions can still view the statuses of transactions for which refunds have been issued, both through the schedule and the Micros Transactions screen.

If you need the ability to issue refunds on your account, please reach out to Jennifer Bermingham on Jennifer.Bermingham@invitedclubs.com.

Micros Transactions Screen

In the manager user role, you can view a screen detailing all transactions that have been pushed from GLF. to the Micros POS. This screen is intended to help you identify and monitor transactions in GLF and reconcile these with your micros system. Under Booking Admin, select ‘Micros Transactions’:



On this screen, you can select from the following tabs to then search and filter through transactions:

- **Booking Transactions -** These are transactions pushed to Micros from the schedule/ booking system. These will include Private lessons and classes across your various booking filters/ durations and instructors.
- **Lesson Package Transactions -** These are transactions pushed to Micros from the online coaching store and will include lesson package options across your instructors.
- **Subscriptions Transactions -** These are transactions related to subscriptions created via the online Coaching Store.
- **Refunded Transactions -** When a refund request is sent for a transaction, users can check its status and view further details in this tab.
-

When searching or filtering transactions, the columns will give you the most important information relating to that transaction and you can also see the Micros payment status:

Orange - Pushed to Micros

Green - Paid/ Refunded via Micros

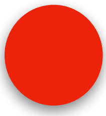
Red - Refunded via Micros

IMPORTANT

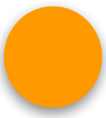
- Transactions only appear on this screen when they have been pushed to micros. Therefore this will include transactions which are Pushed to Micros (orange) or Paid via Micros (green).

Push Statuses

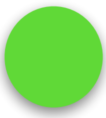
There are four color/icon statuses that have been implemented on the GLF. Connect system to indicate the status of a transaction in GLF. and when it is pushed to Micros. On the GLF. System, the four colors./icons will be presented as:



Red / Pending Push:
These are bookings such as private lessons, class revenue or class sessions delivered which have not yet been pushed to Micros.

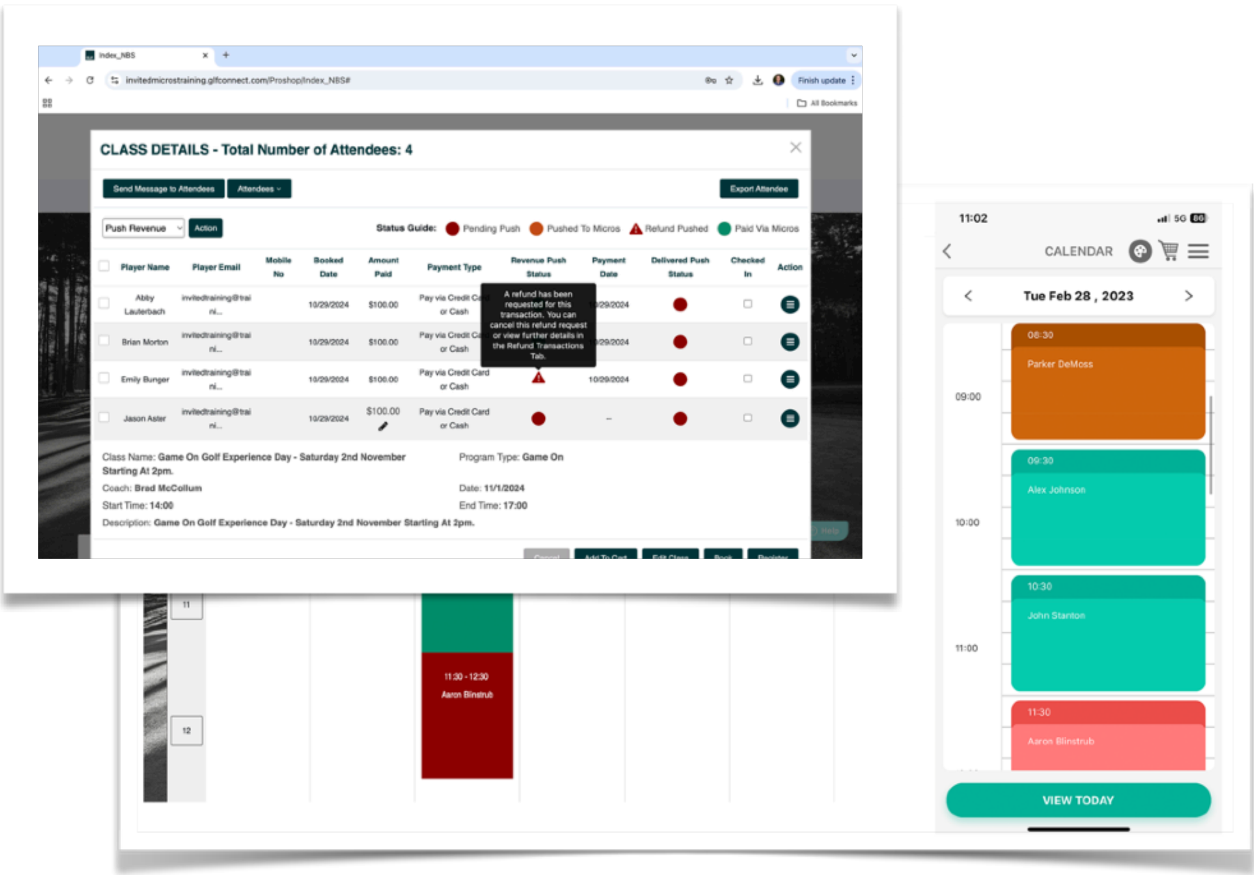


Orange / Pushed to Micros:
These are bookings or refund requests such as private lessons, class revenue or class sessions delivered which have been pushed to Micros POS but the transaction has not yet been closed out. You cannot make any changes to this transaction in GLF. However users with manager rights can cancel the push.



Green / Closed on Micros:
These are bookings or refunds such as private lessons, class revenue or class sessions delivered 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.

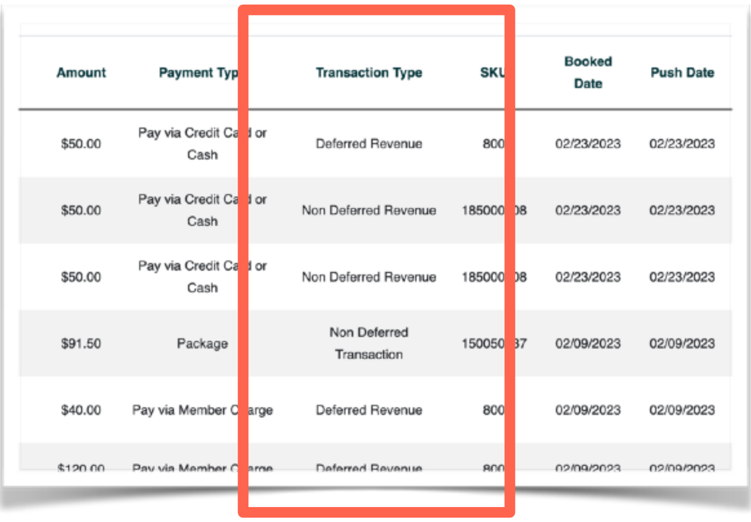
Refund Pushed:
This icon helps users identify the status of transactions for which a refund has been requested but not yet issued. When a refund is issued, the status of the initial charge will change to red (Pending Push). If the refund request is canceled, the initial charge status will revert to green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



Deferred vs. Non-Deferred Revenue

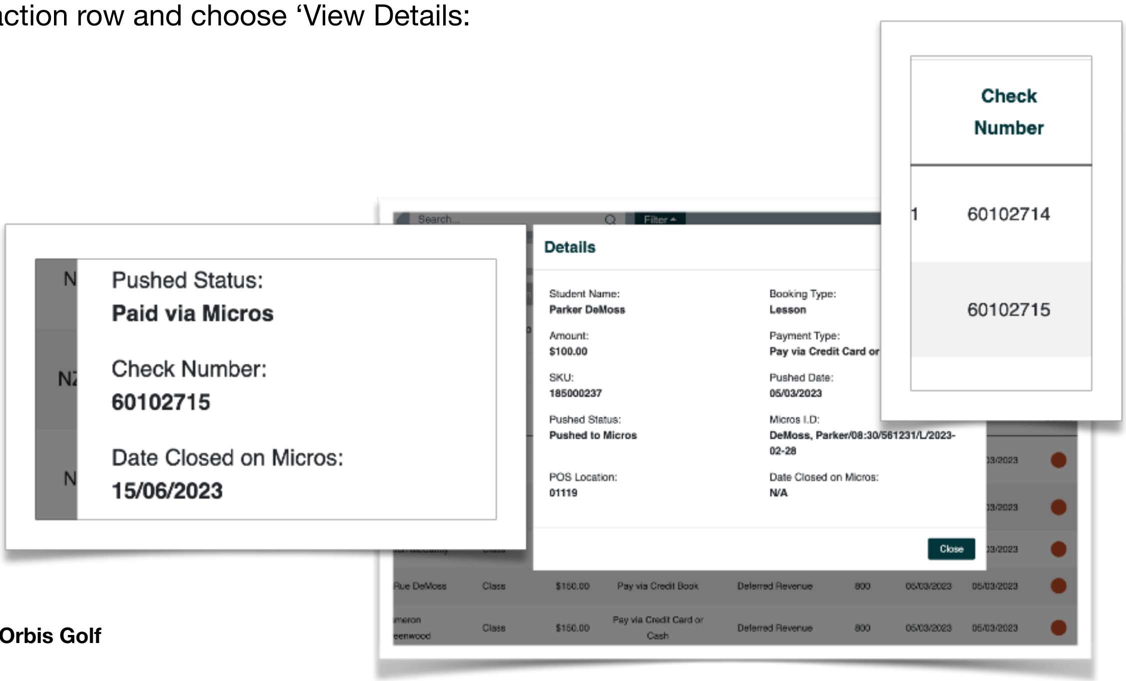
On the Micros transaction screen within the Booking Transactions Tab, you will see Transaction type column. This column will display the following two options:

- **Deferred Revenue -** This is tied into class bookings or golf lesson packages (advance payment booking) and the revenue amount that will be transacted and reflected on the General Ledger Balance Sheet until the class or program has been provided.
- **Non-Deferred Revenue -** This is either individual private lessons or private lessons or group class programs redeemed using a package or a class session delivered amount. It is a transaction where the check has been closed out to the relevant payment type or the funds have been deducted from the general ledger holding account where fund were originally deposited at the time of purchase. This is revenue recognized once the service has been provided.



On this screen you can view the unique identifier of the transaction in Micros titled as the Check Number as well as the Micros Transaction I.D which will appear on the check presentation screen. You can also view the date the transaction was closed on Micros.

The Check Number will help you tie the specific transaction back to the reporting available in Micros. You can view important information relating to each transactions on this screen, however you can also view further information by clicking the action icon on the right hand side of each transaction row and choose ‘View Details:

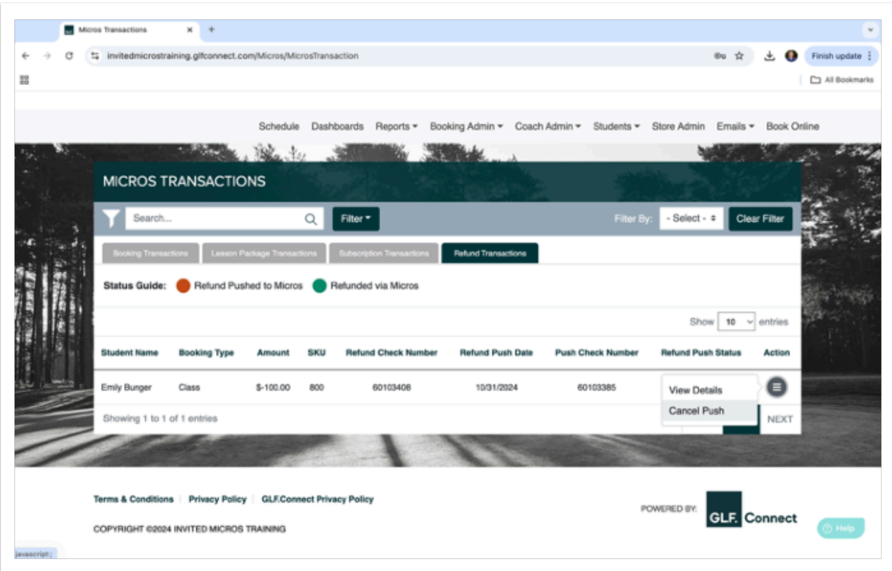


Cancelling a Push

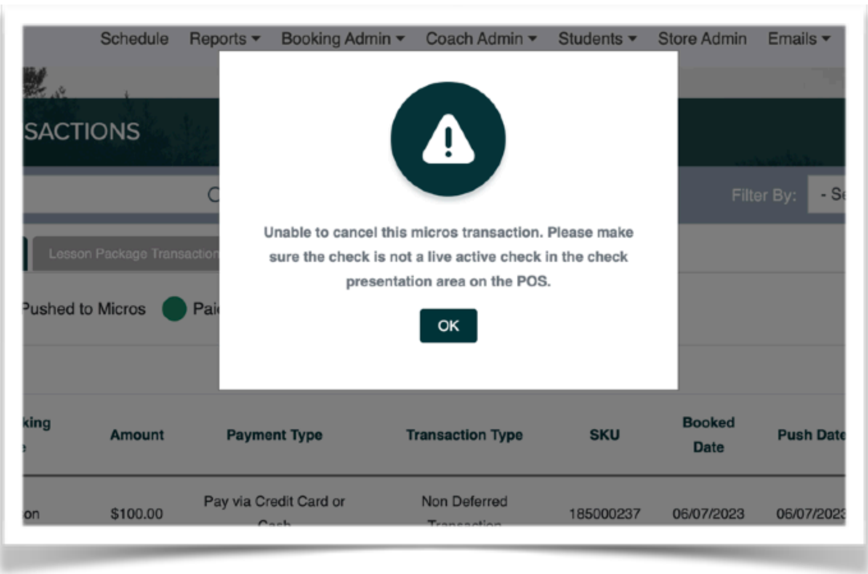
To resolve instances where a transaction has been pushed to Micros incorrectly there is option to 'Cancel the Push' from the Micros Transactions Screen. This is only available when transactions have been pushed (Orange) but have not yet been closed on Micros. Pushes for both the lesson, package or class charge or a refund request can be cancelled.

Coach users are able to cancel the push of a transaction charge via the Mobile Apps and this is covered in the Coaches Operating Manual. This will "remove" the original transaction "PUSH" from the MICROS POS "Open Check" screen and pull back into GLF. Connect.

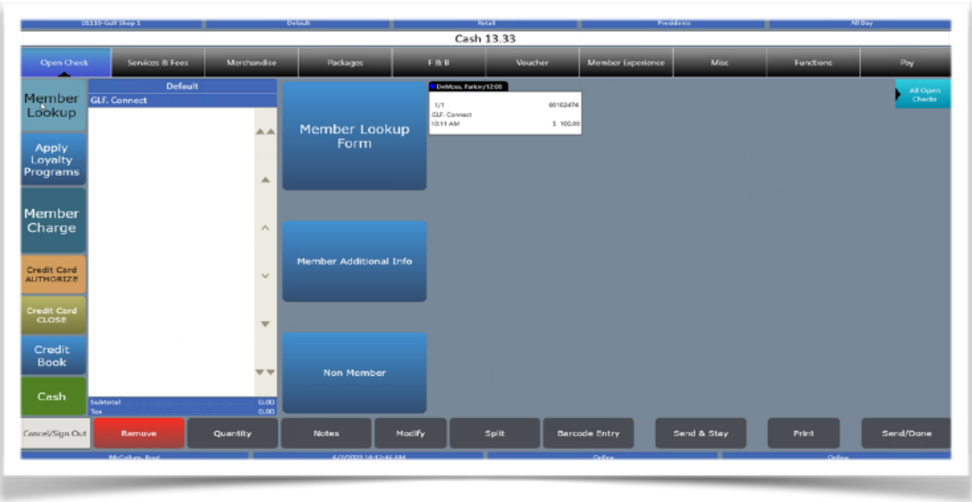
After finding the transactions within the specific tab, navigate to the action menu icon on the right hand side of each transaction row and select 'Cancel Push':



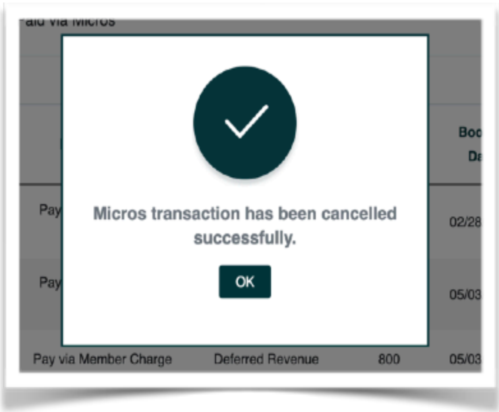
To *"Cancel the Push"* of a specific transaction, the check should be visible on the Check Presentation Screen and not an open check. If the check is open, then an error message will appear on GLF. When attempting to cancel:

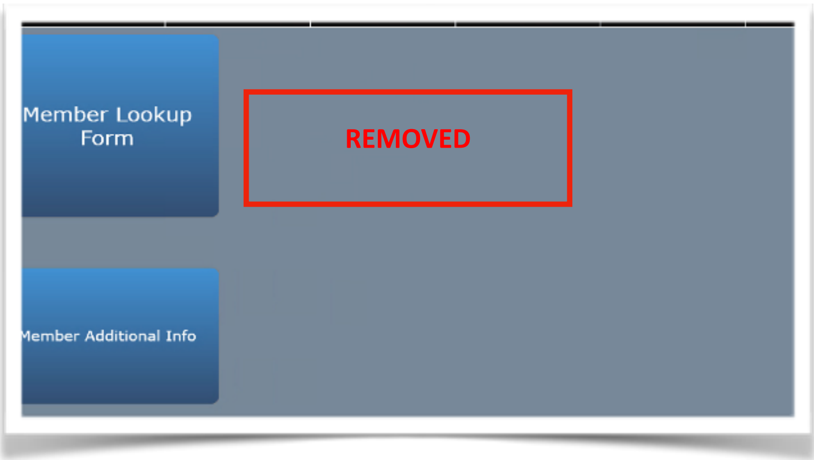


The check should appear as per the below image for it to be cancelled:



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:





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 to GLF, however this is not best practice guidance.

Processing Refunds

Refundable Transactions

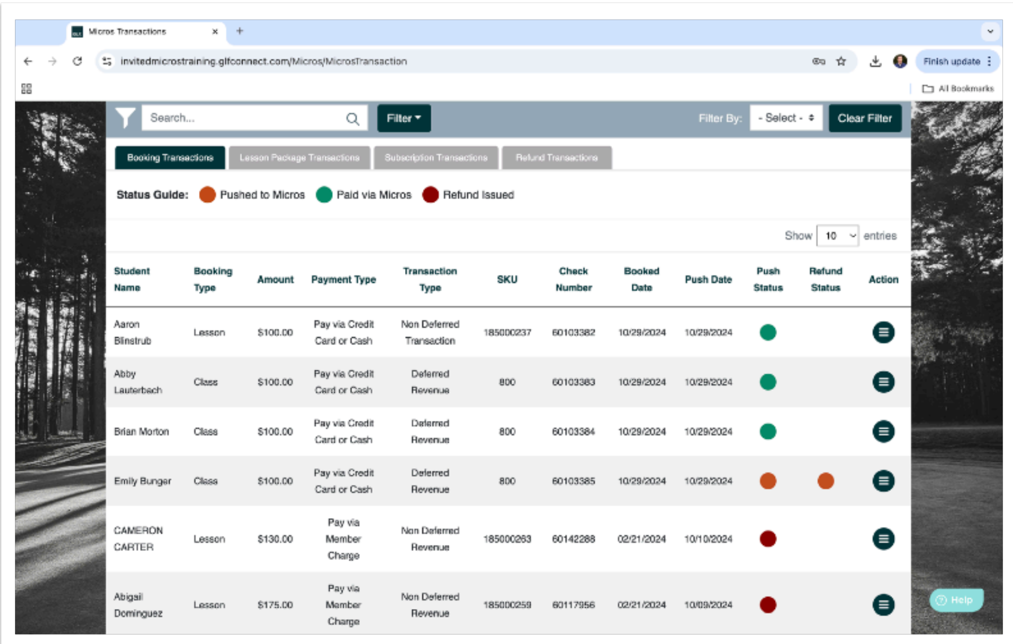
Users with the appropriate refund rights can process refund checks for the following transactions directly at the POS:

- **Private Lesson Charge:** This applies to any one-on-one booking, such as club fittings or private lessons. The initial charge for the lesson is eligible for a refund.
- **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 the class has not yet been closed on the POS.
- **Un-used 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 used.
- **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.

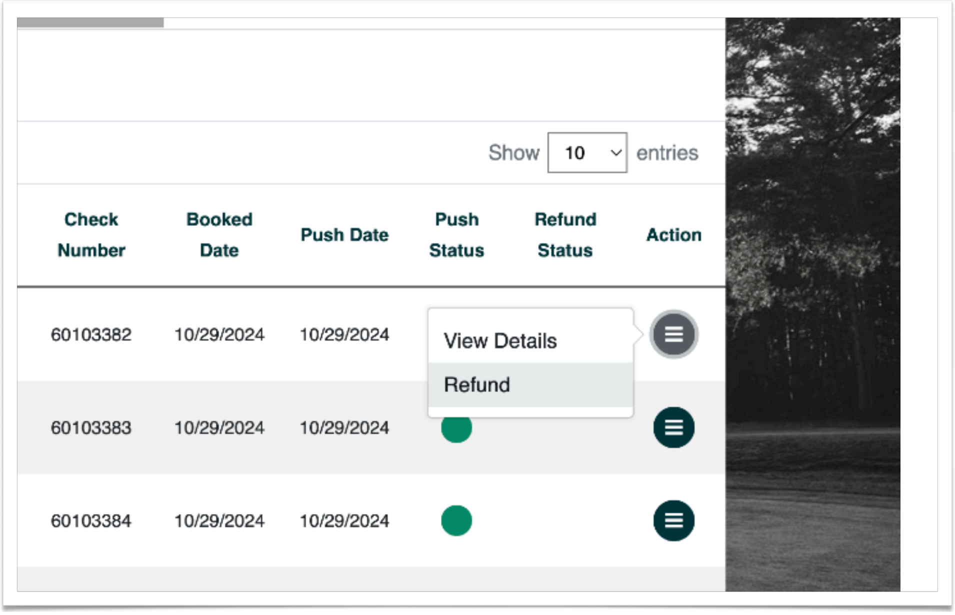
Refunded Transactions Tab on Micros Transactions

The Micros Transactions Screen serves as the central hub for tracking the status of transactions pushed to the POS, including refunds. Several actions can be performed, displaying important information that allows users to monitor the status of refunds and access additional details. The main features include:

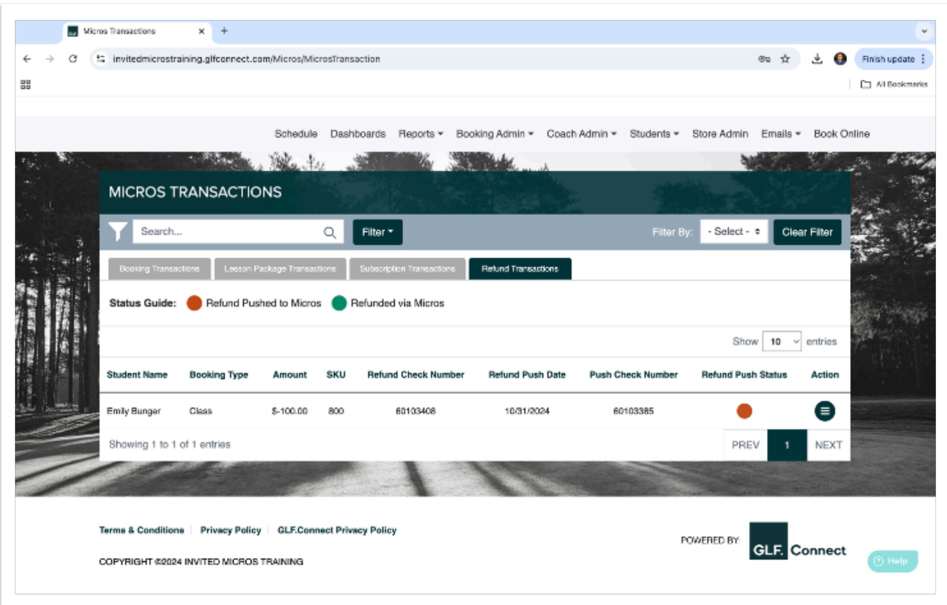
- **Refund Status Column:** A "Refund Status" column is visible on the booking, lesson package, and subscription tabs. This column displays the traffic light status of each transaction regarding any refunds issued. It will be blank when a refund has not been requested, orange when a refund request has been pushed, and green 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 using the action menu option:



- **Refunded Transactions Tab:** When a refund request is sent for a transaction, users can check its status and view further details in the Refunded Transactions Tab. This tab provides key information, such as the refund check number, the original push check number, the traffic light status, and 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:



Refund Restrictions

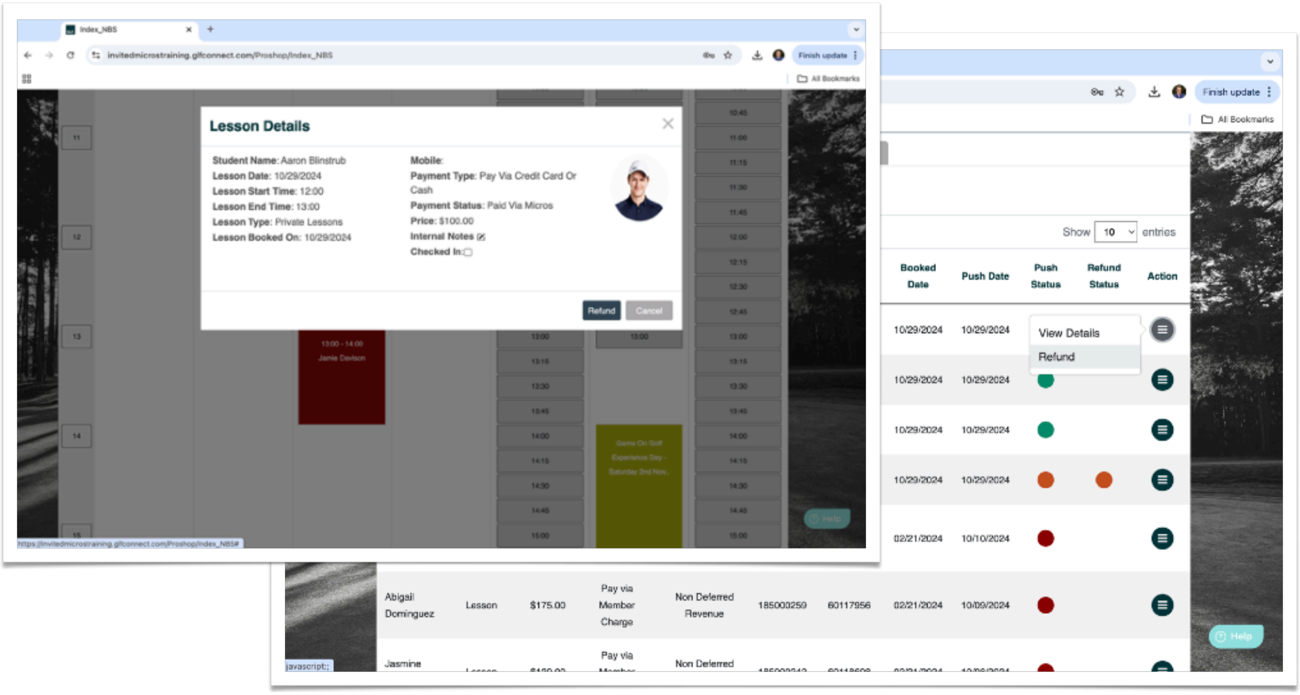
Certain system restrictions prevent refunds from being issued. These include:

- **Closed on Micros:** Refunds can only be issued for transactions with a Closed on Micros (green) status.
- **Undelivered Class Revenue Only:** Refunds can only be issued for class revenue transactions, meaning the initial charge for a class when the delivered status for any sessions has not yet been pushed. Once the delivered checks are pushed to the POS and funds are deducted from the Balance Sheet Account, a refund cannot be issued.

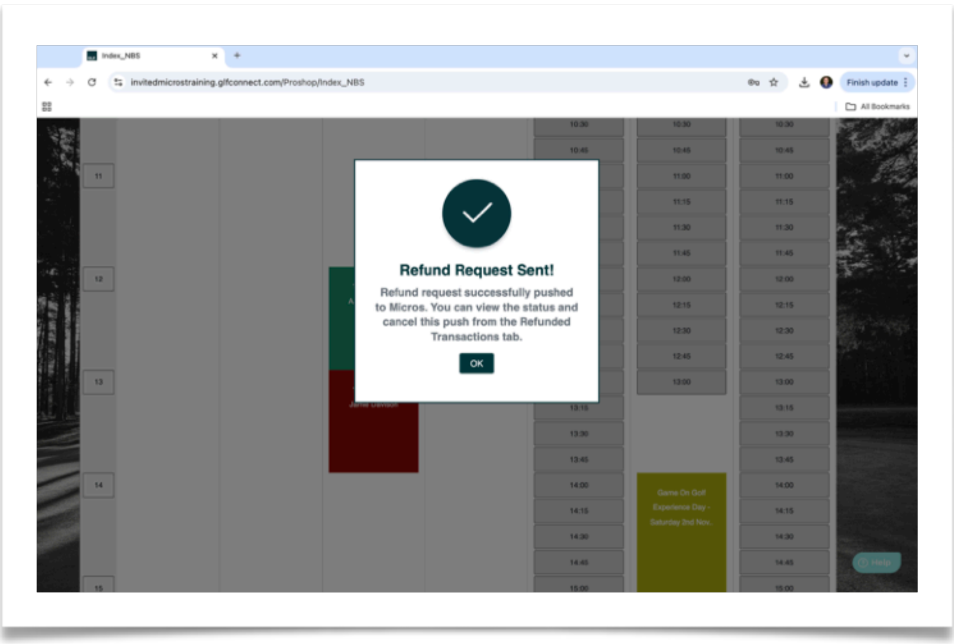
Issuing a Private Lesson Refund

Refunds can be issued for Private Lesson transactions via the Schedule View or the Micros Transactions screen:

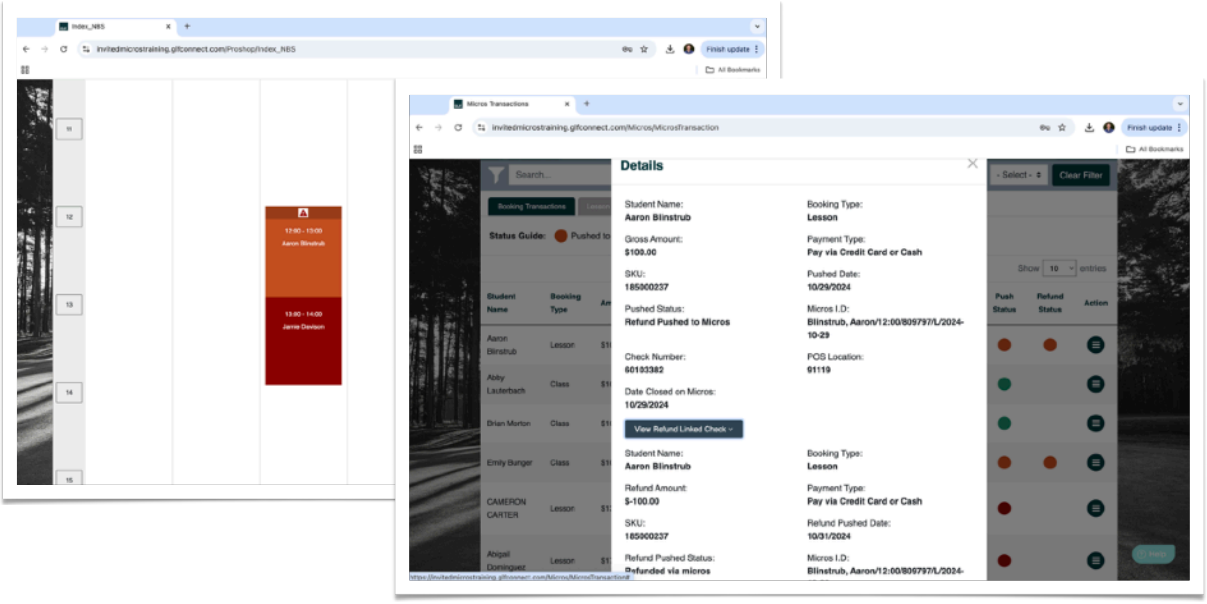
> **Step 1: Push Refund -** From the Lesson Details Screen, accessible via the schedule or from the action menu icon on the Booking Transactions tab for the relevant lesson, you can select the Refund button:



> **Step 2: Confirmation -** If the push is successful, you will see a success alert, and the booking will turn orange in the Schedule View. At this point, you cannot amend the booking, and the refund transaction will need to be closed on Micros by the Point of Sale user:

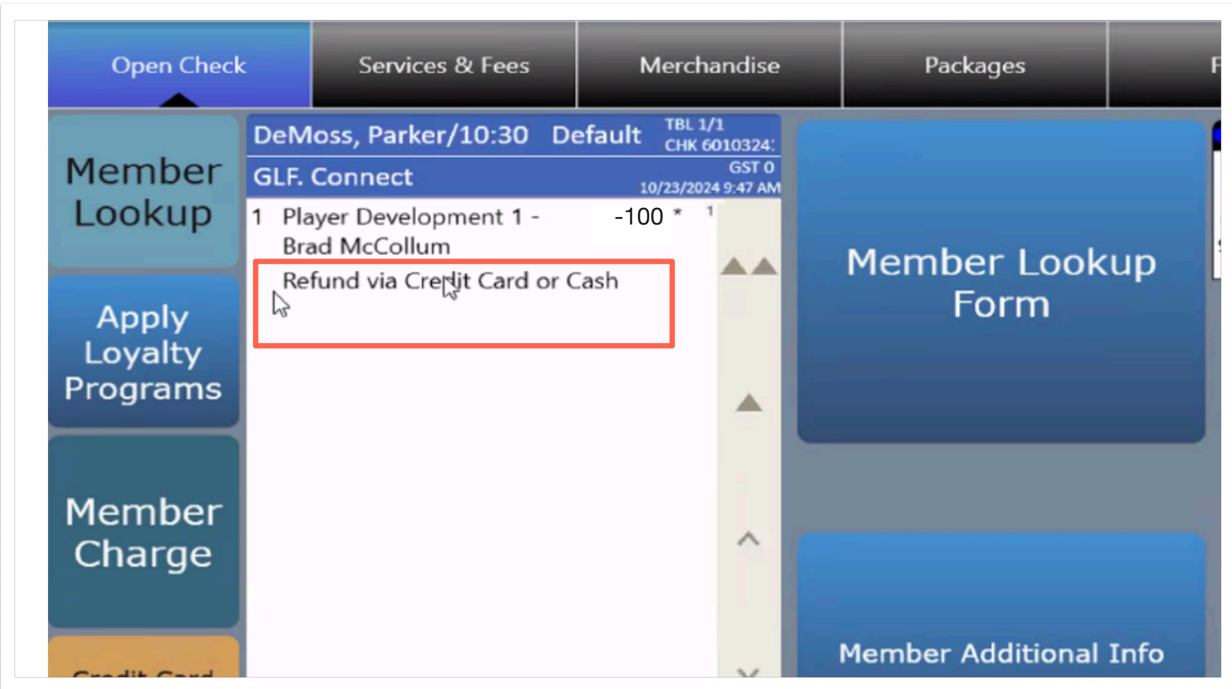


The Refund Status in the Refund Status column will be updated to orange on the Micros Transactions screen in the Bookings Transactions tab and show in orange on the schedule. Users will also be able to review the refund pushed status icon on top of the booking. The refund check information and additional details in the Refunded Transactions tab:



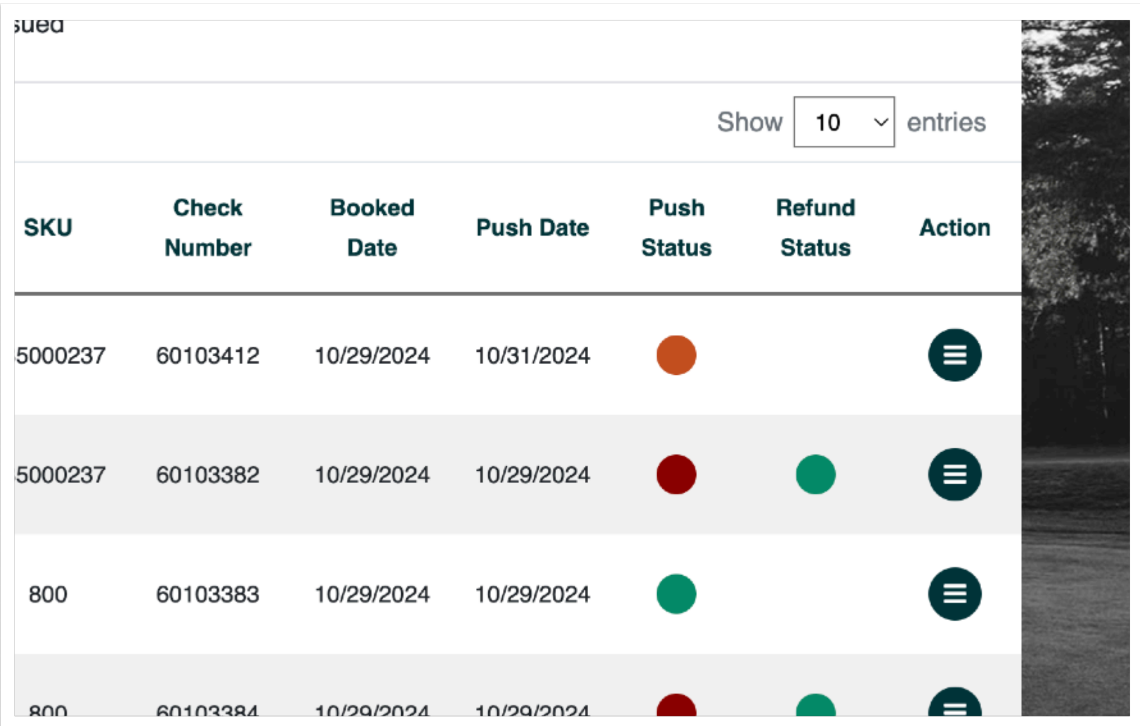
Step 3 - Close Refund Out on Micros - Once the refund transaction check appears on Micros, the user will need to note the Payment Preference displayed on the check, which will be the same as the original charge, and process accordingly. These will be:

- **Refund via Credit Card or Cash -** You should refund the student's credit card or issue a cash refund. The student will need to visit the POS location at your club with their physical card.
- **Refund via Member Charge -** You should not expect the member to come into the golf shop to receive the refund; instead, you should refund to Member Charge.
- **Refund Via Credit Book -** You should not expect the member to come into the golf shop to receive the refund; instead, you should refund to Credit Book.



After the refund check is tendered on Micros, the status of the booking on the schedule in GLF will be updated to Pending Push (red), allowing the users to re-push or remove the booking:

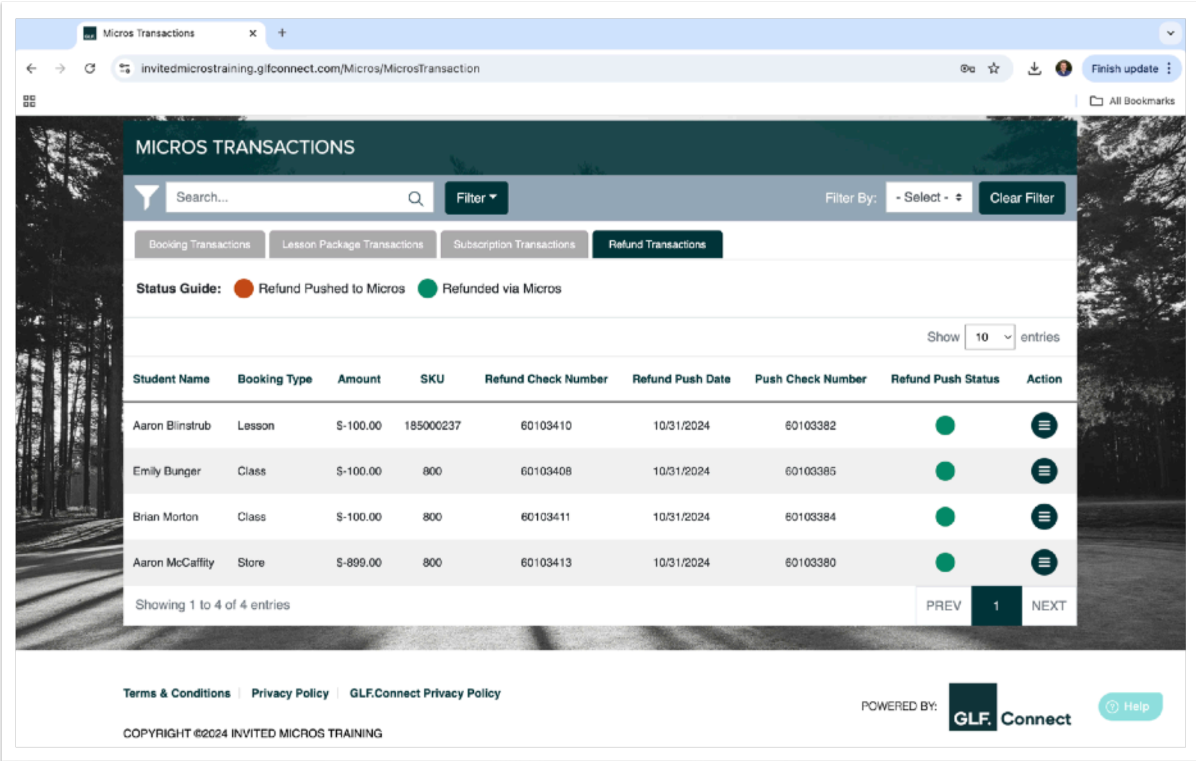
The Refund Status will be updated to green on the Booking Transactions tab in the Micros Transactions screen, and the Booking Type will show as (Refunded):



Show 10 entries

SKU	Check Number	Booked Date	Push Date	Push Status	Refund Status	Action
5000237	60103412	10/29/2024	10/31/2024			
5000237	60103382	10/29/2024	10/29/2024			
800	60103383	10/29/2024	10/29/2024			
800	60103384	10/29/2024	10/29/2024			

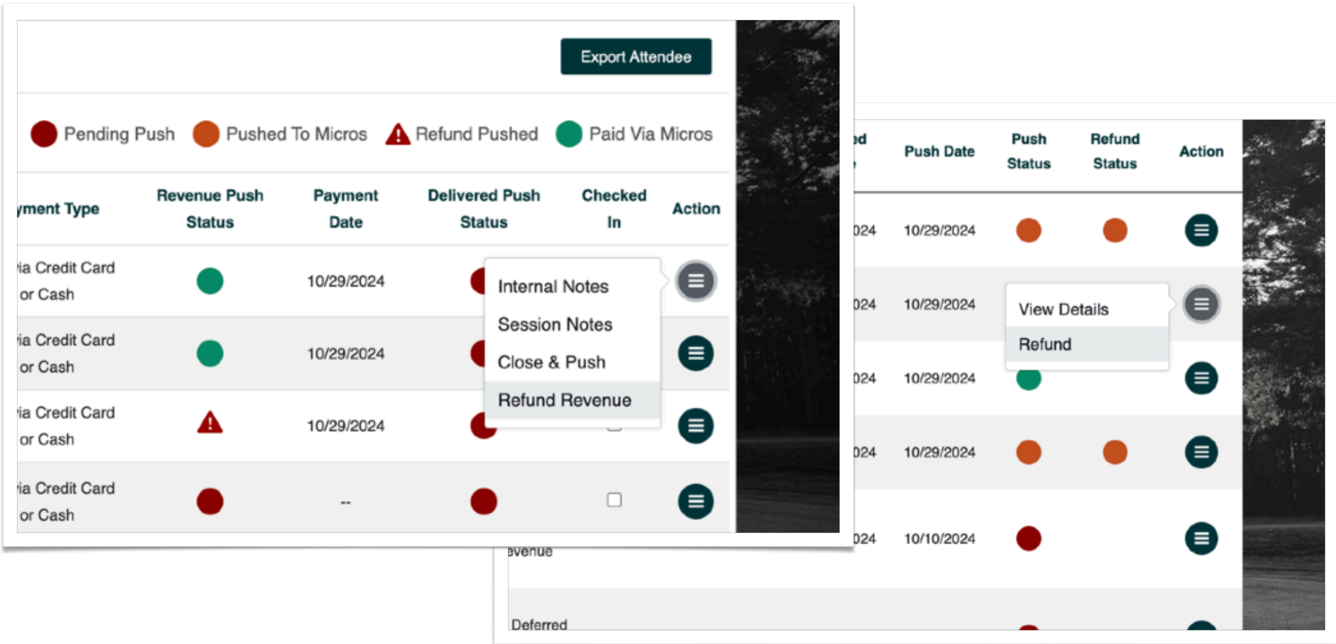
Users will also be able to review the Refund Check information and additional details in the Refunded Transactions tab:



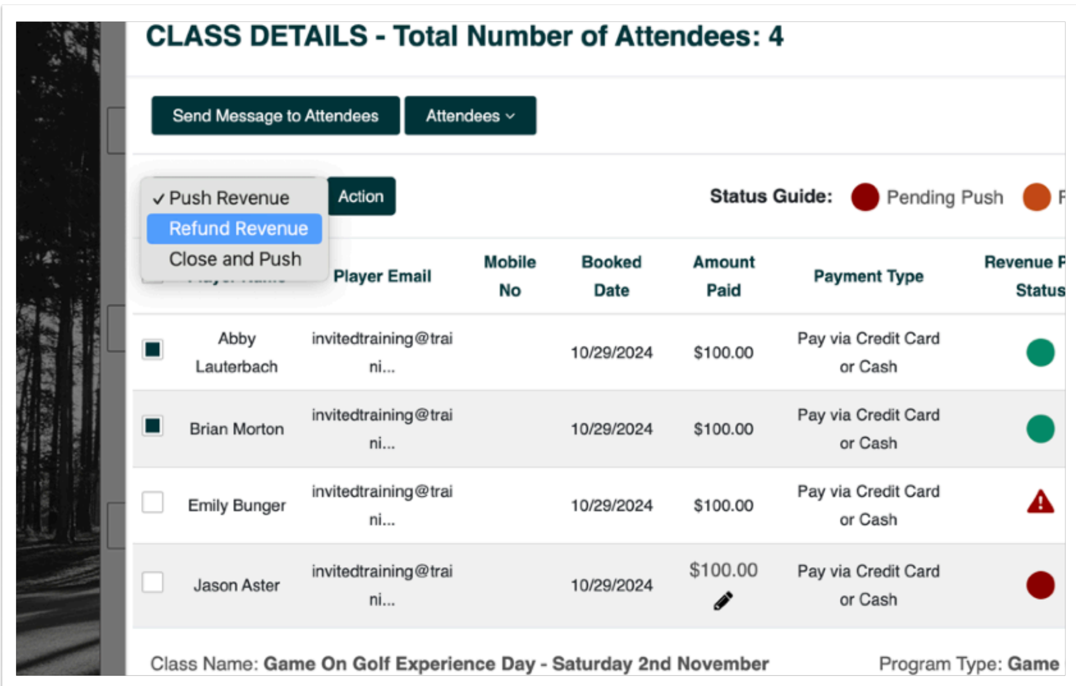
Issue a Class Revenue Refund

Step 1: Push Refund - Refunds can be issued for class revenue transactions via the Class Details screen on the Schedule View or the Micros Transactions screen in the Booking Transactions tab.

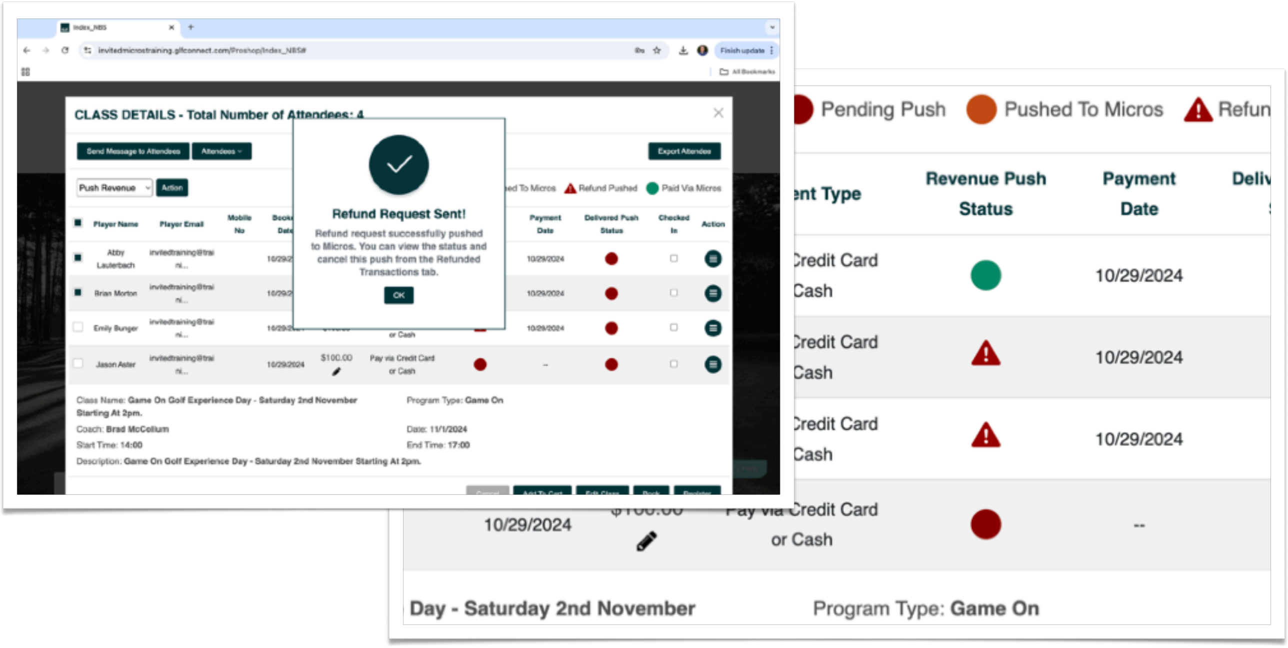
- **Selecting a Single Student -** To push a refund for a single student, you can select the Push Refund option in the action icon for any student whose Micros payment status is green (Paid via Micros) and where the delivered status for each class session is pending push (red):



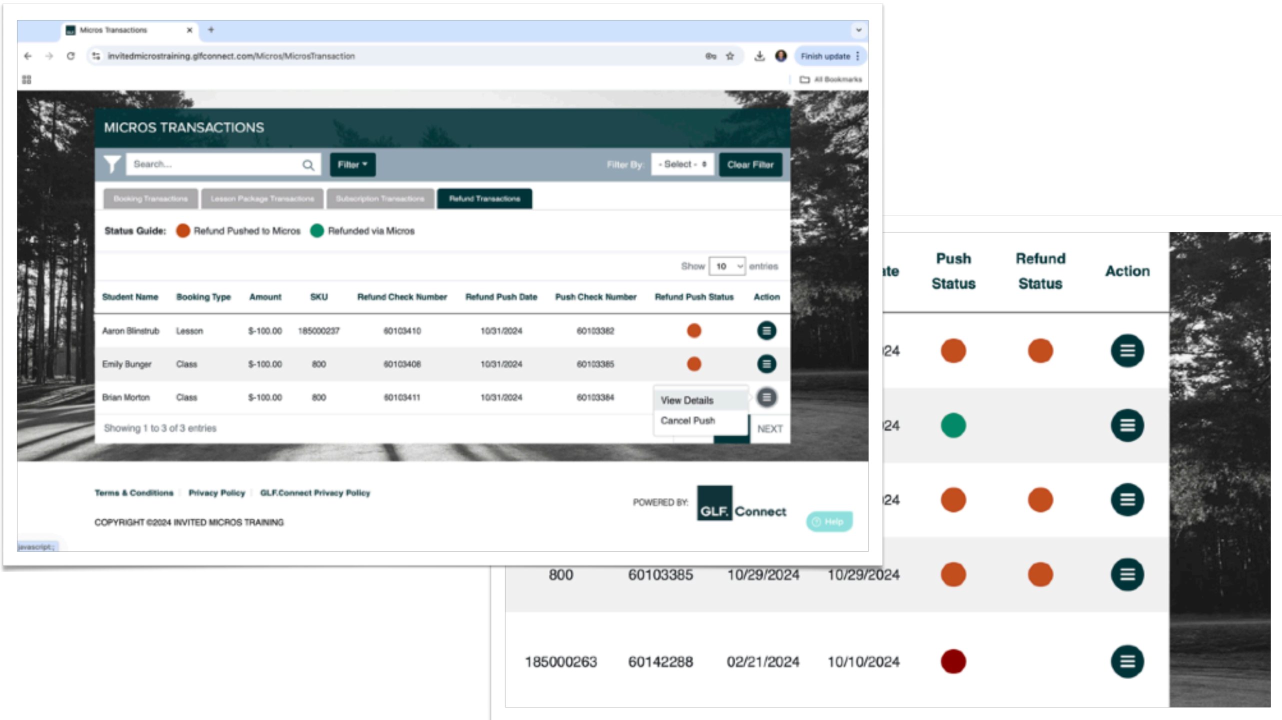
- **Selecting Multiple Students -** Multiple students can be selected using the checkbox on the left-hand side of each student, and then selecting Refund Revenue from the dropdown:



Step 2: Confirmation - If the push is successful, you will see a success alert, and the revenue push status will change to Refund Pushed on the Class Details screen:

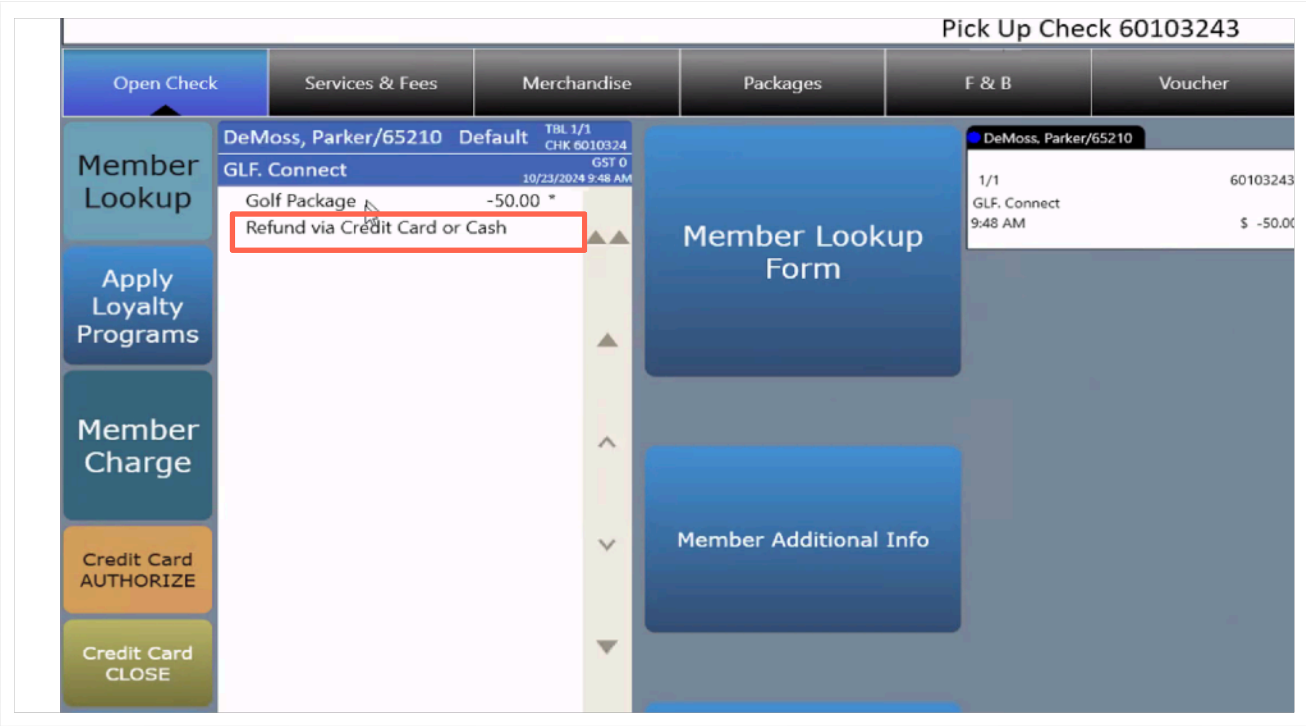


The Refund Status in the Refund Status column will be updated to orange on the Micros Transactions screen in the Booking Transactions tab for the deferred revenue charge. Users will also be able to review the refund check information and additional details in the Refunded Transactions tab:

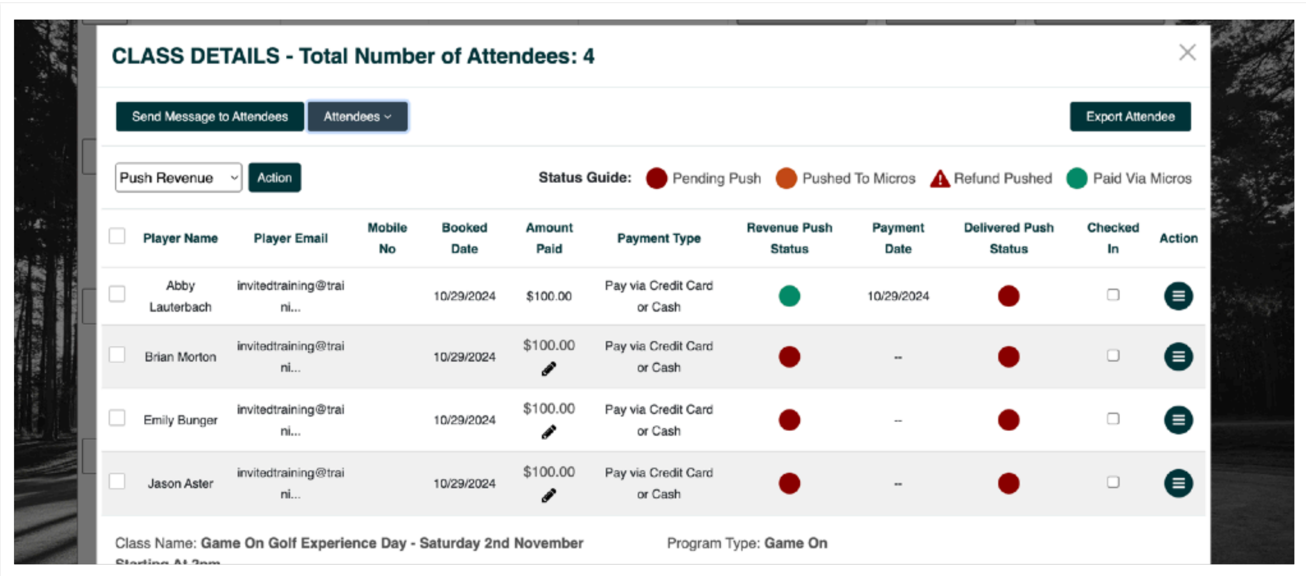


Step 3: Close Refund Out on Micros - Once the refund transaction check appears on Micros, the user will need to note the Payment Preference displayed on the check, which will be the same as the original charge, and process accordingly. This will be:

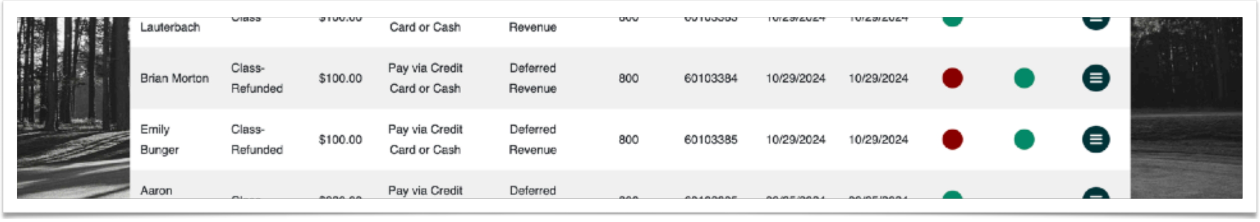
- **Refund via Credit Card or Cash -** You should refund the student's credit card or issue a cash refund. The student will need to visit the POS location at your club with their physical card.
- **Refund via Member Charge -** You should not expect the member to come into the golf shop to receive the refund; instead, you should refund to Member Charge.
- **Refund Via Credit Book -** You should not expect the member to come into the golf shop to receive the refund; instead, you should refund to Credit Book.



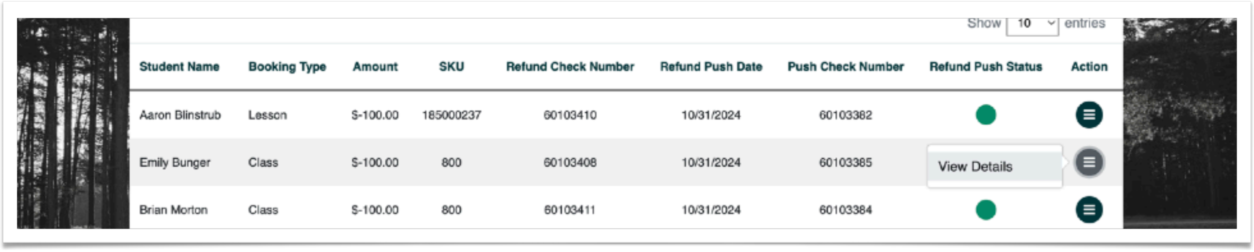
After the refund check is tendered on Micros, the status of the booking on the Class Details pop-up via the schedule in GLF will be updated to Pending Push (red), allowing the users to re-push or remove the student from the class:

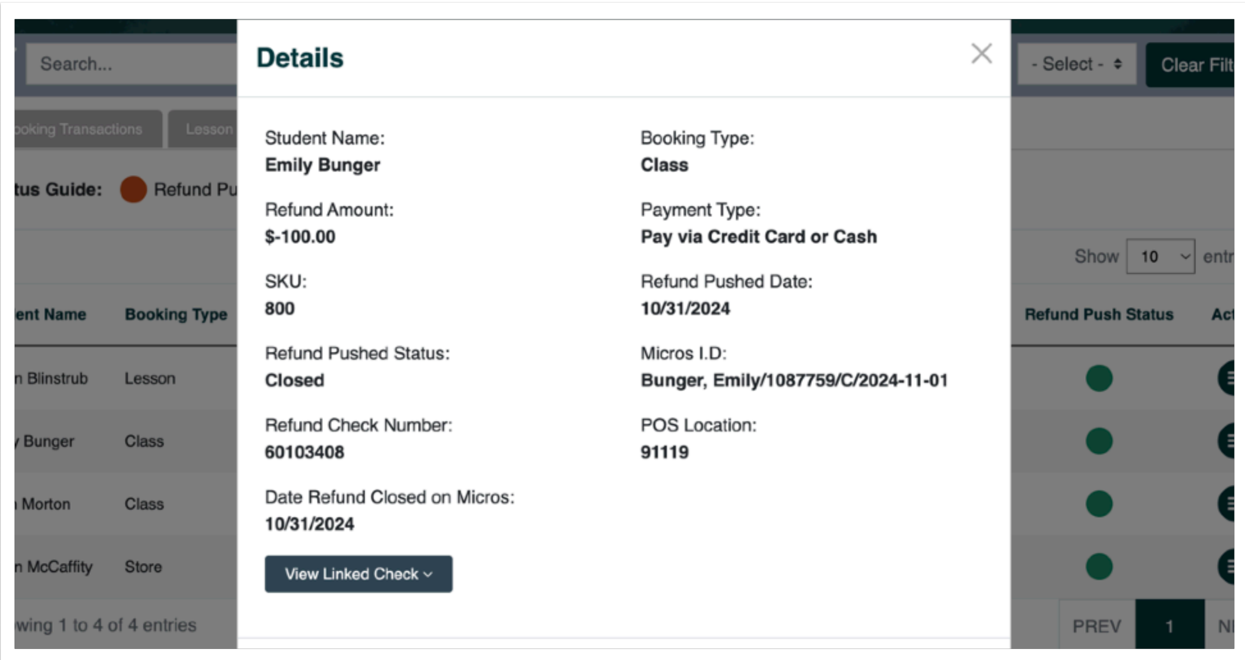


The Refund Status will be updated to green on the Booking Transactions tab in the Micros Transactions screen, and the Booking Type will show the text Refunded in brackets:



Users will also be able to review the Refund Check information and additional details in the Refunded Transactions tab:





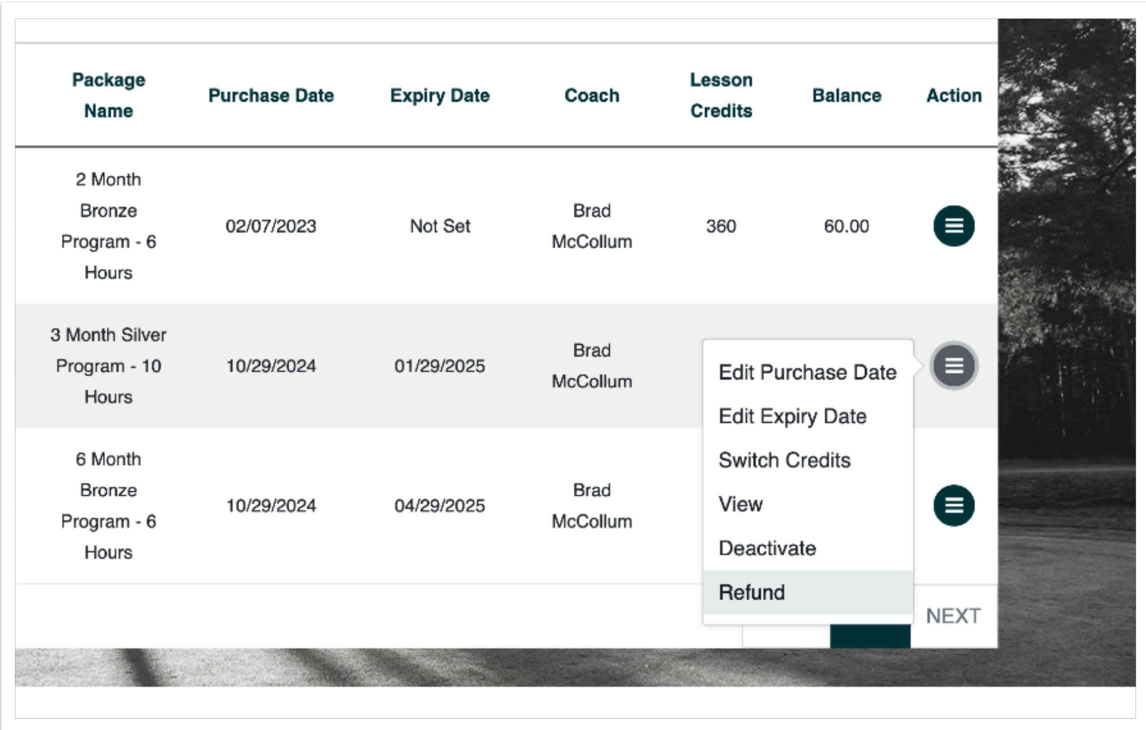
IMPORTANT

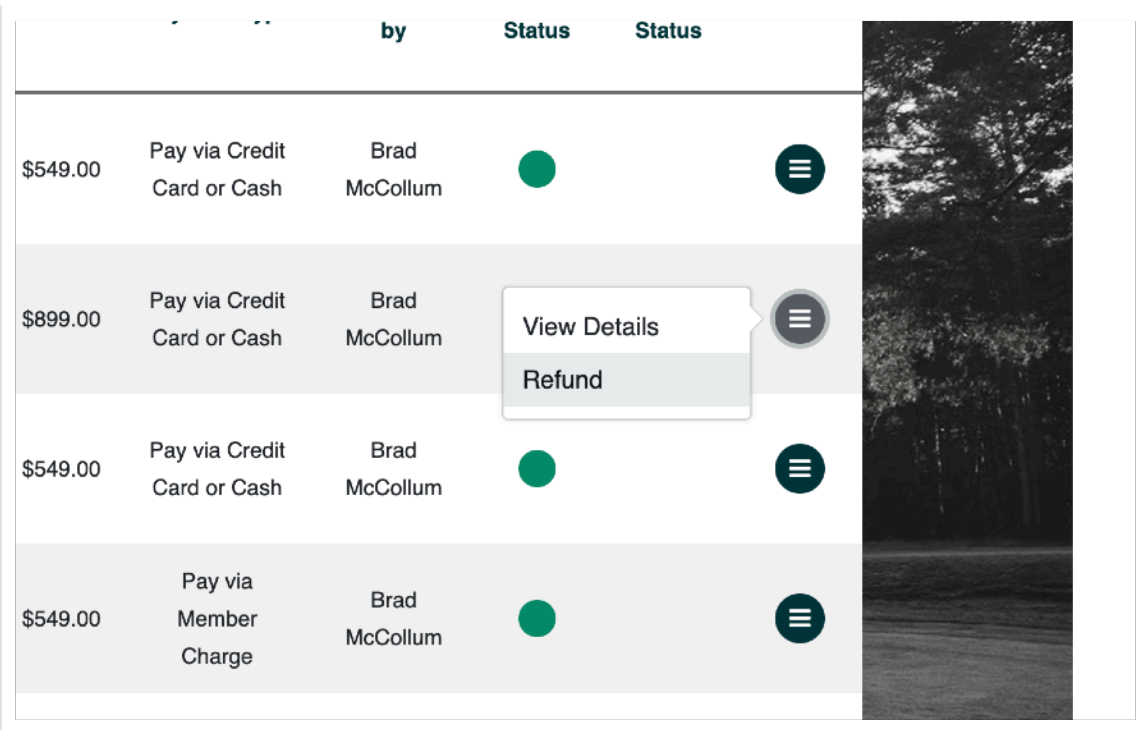
- When refunding class revenue, the funds originally charged sit on the general ledger and therefore when the refunds is issued the funds are automatically pulled off the general ledger.
- Refunds can only be issued for class revenue transactions, meaning the initial charge for a class when the delivered status for any sessions has not yet been pushed.

Issuing a Lesson Package Refund Partial and Un-Used

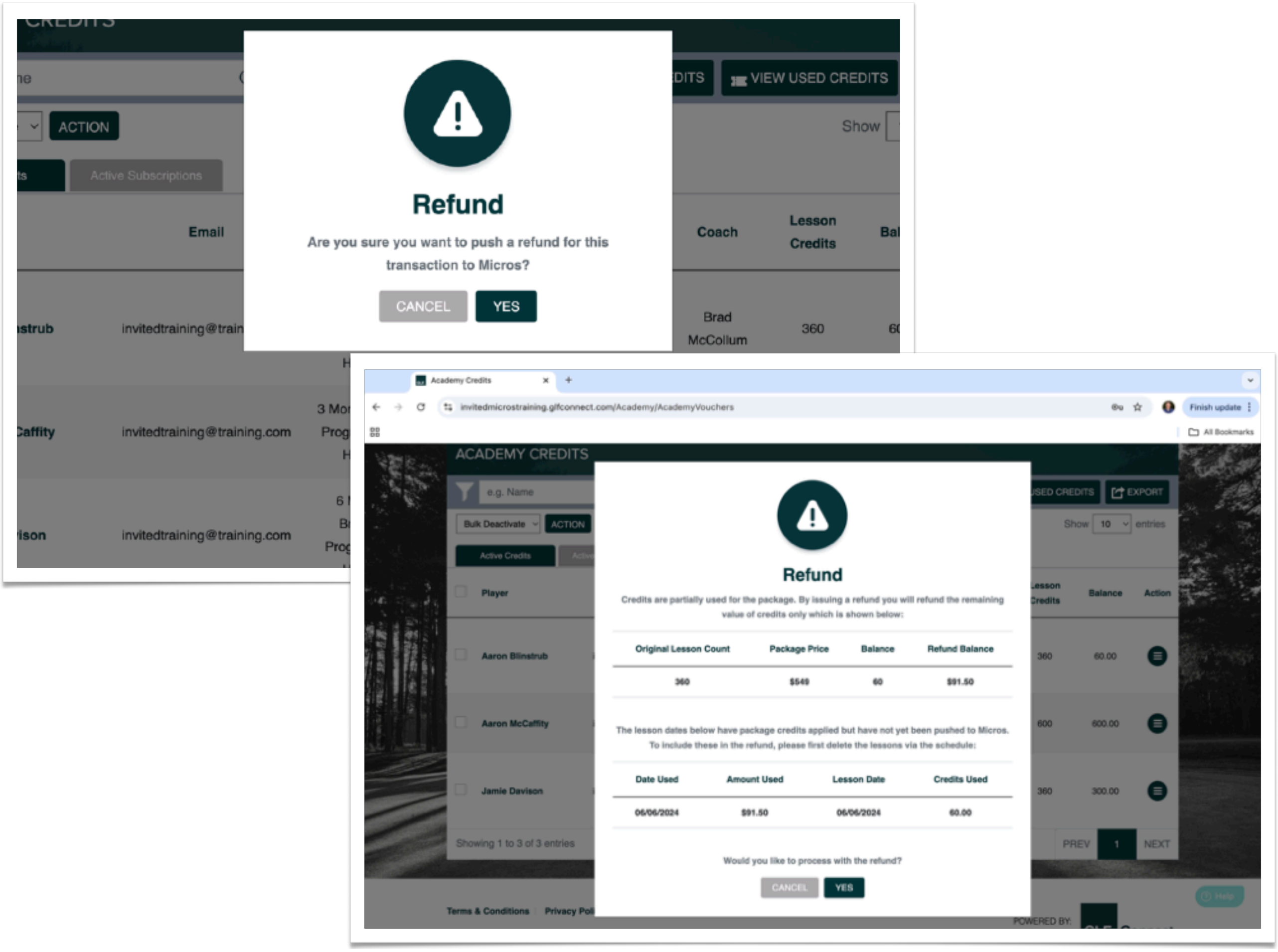
Refunds can be issued for unused Lesson Packages where the lesson credits included in the package have not been utilized, as well as for partially used Lesson Package charges where some lesson credits have been used. The remaining credits will be refunded.

Step 1 - Select the Package - Issuing a refund for a Lesson Package can be completed via the Academy Credits screen in the Manager user role or the Lesson Package tab from the Micros Transactions screen:

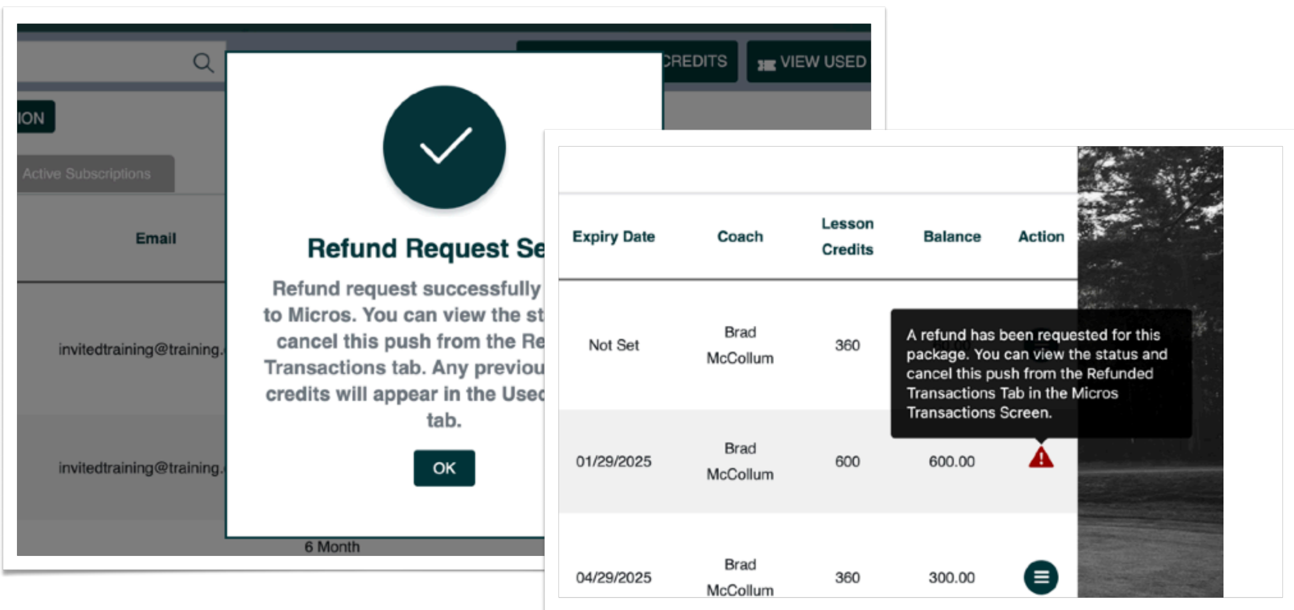




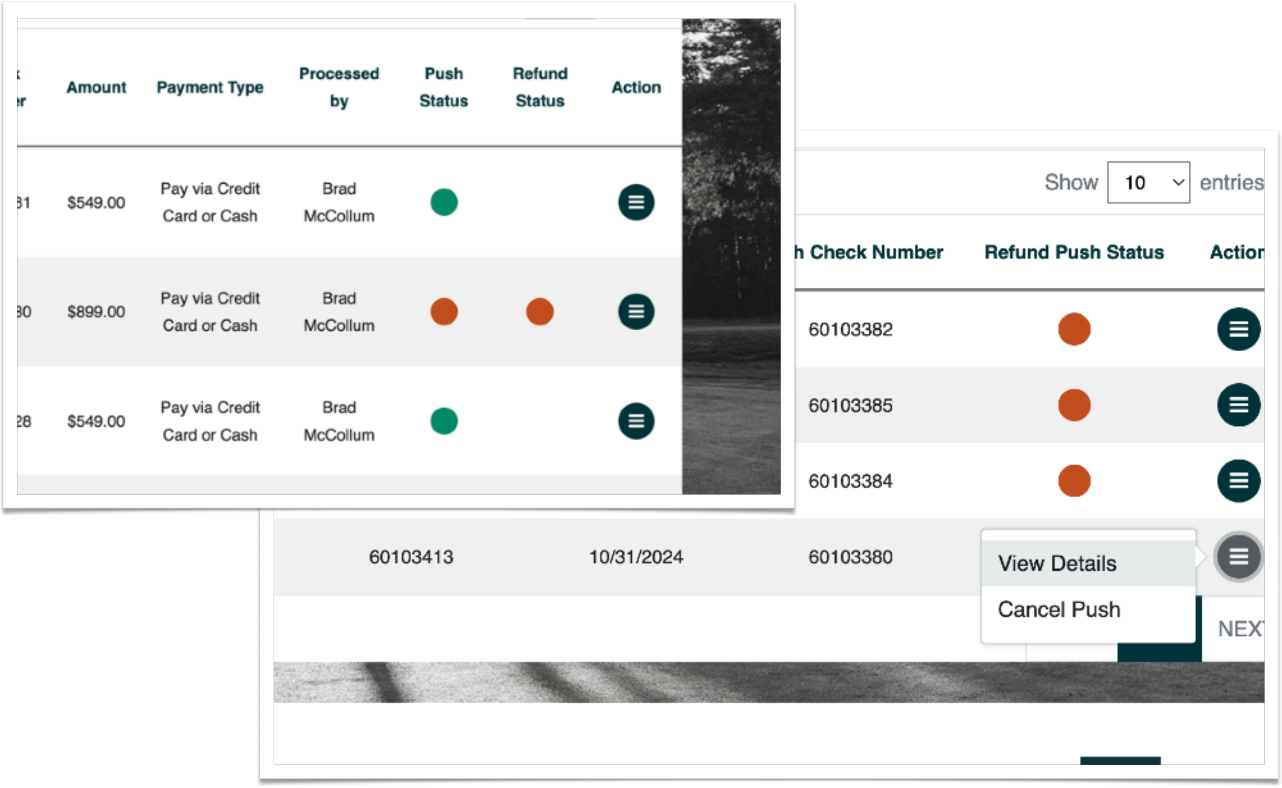
From the action menu on both screens, click the option Refund. For packages with unused credits, users will be prompted to confirm the push to the POS. For packages with partially used credits, users will be informed that only the balance for the remaining unused credits will be pushed to the Point of Sale:



Step 2: Confirmation - If the push is successful, you will see a success alert. On the Academy Credits screen, the Refund push status icon will appear, preventing the user from performing any further actions. Credits will also be temporarily removed from the student's account, preventing them from being applied to bookings:

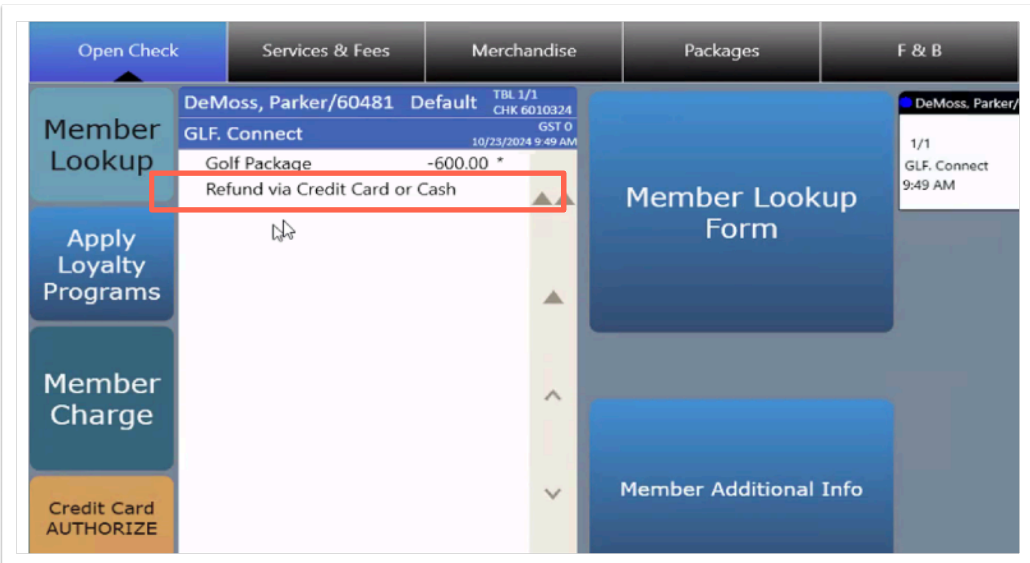


The Refund Status in the Refund Status column will be updated to orange on the Micros Transactions screen in the Lesson Package Transactions tab. Users will also be able to review the refund check information and additional details in the Refunded Transactions tab:

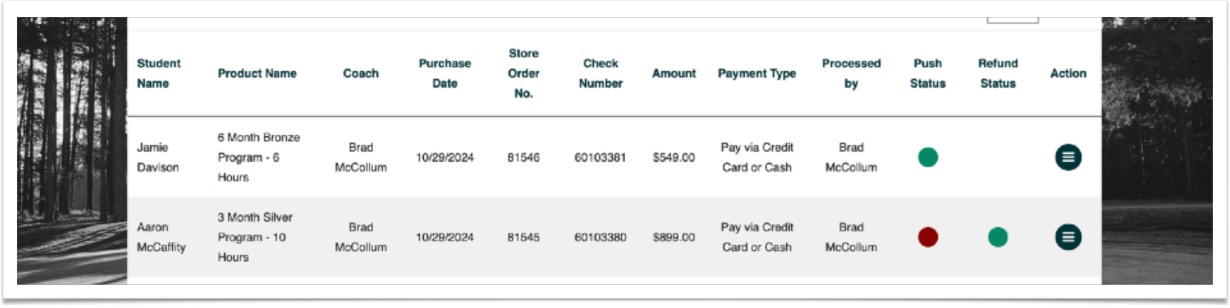


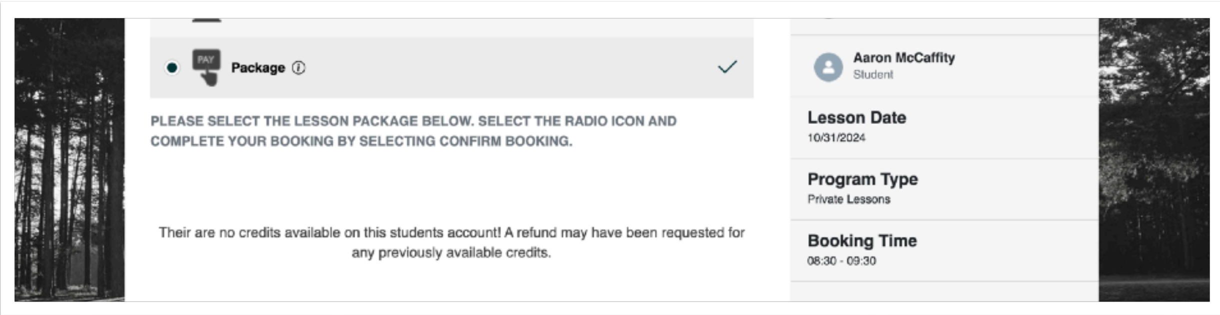
Step 3 - Close Refund Out on Micros - Once the refund transaction check appears on Micros, the user will need to note the Payment Preference displayed on the check, which will be the same as the original charge, and process accordingly. This will be:

- **Refund via Credit Card or Cash -** You should refund the student's credit card or issue a cash refund. The student will need to visit the POS location at your club with their physical card.
- **Refund via Member Charge -** You should not expect the member to come into the golf shop to receive the refund; instead, you should refund to Member Charge.
- **Refund Via Credit Book -** You should not expect the member to come into the golf shop to receive the refund; instead, you should refund to Credit Book.

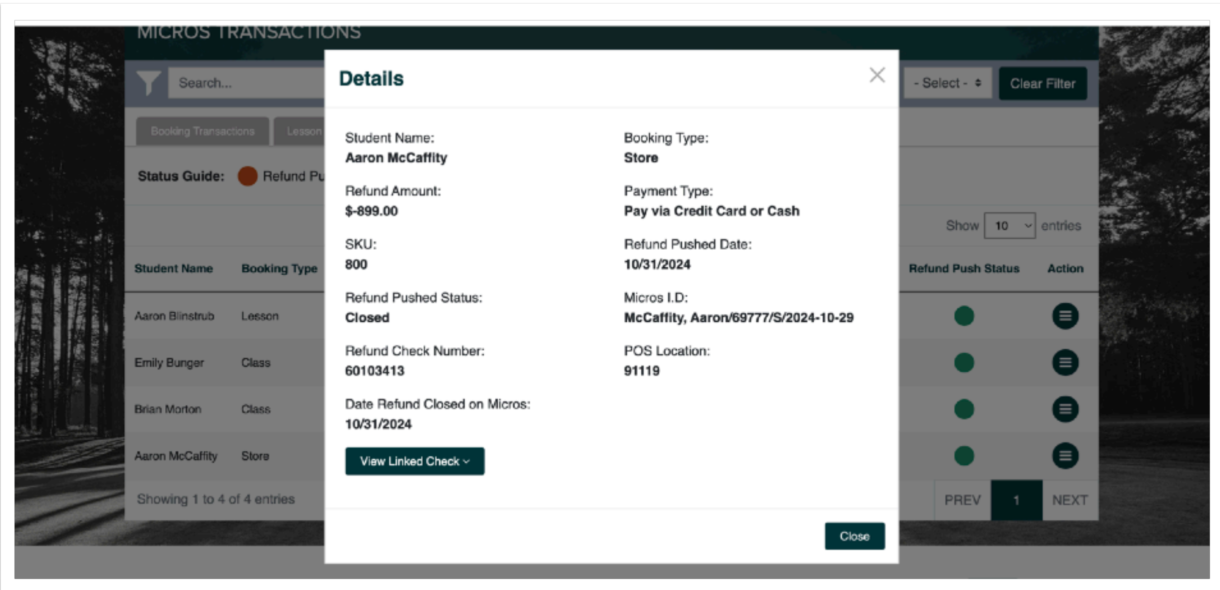


After the check is tendered on Micros, the credits will be removed from the students' accounts and will no longer display on the Academy Credits screen. The Refund Status will be updated to green on the Lesson Package Transactions tab in the Micros Transactions screen, and the Booking Type will show the text (Refunded) in brackets:





Users will also be able to review the Refund Check information and additional details in the Refunded Transactions tab:



IMPORTANT

- When refunding lesson packages, the funds originally charged sit on the general ledger and therefore when the refunds is issued the funds are automatically pulled off the general ledger.

Lesson Income Reports

For the Micros integration functionality, updated and enhanced lesson income reports have been implemented. This includes updating the columns and language used and how group program delivered amounts display in the Lessons Delivered Reports.

There are five reports available in the Lesson Income Reports screen:

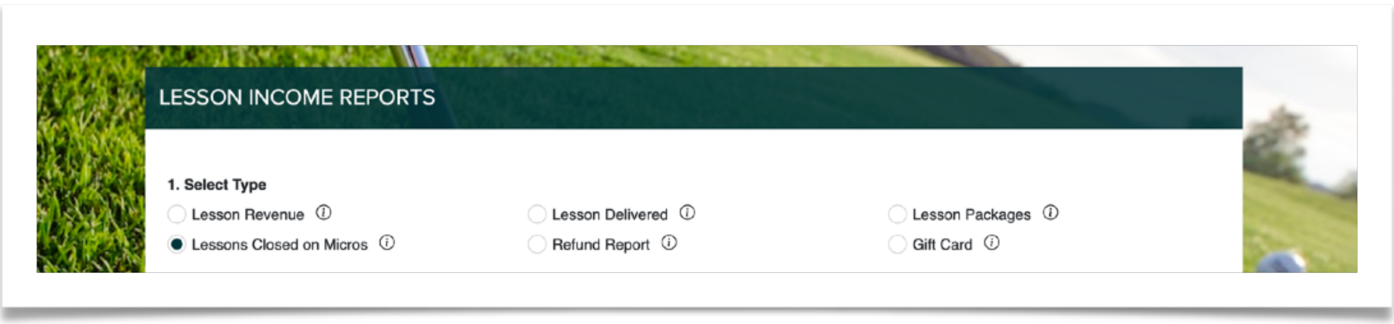
- **Lesson Revenue -** This report exports the total revenue amount taken between the selected date range. It only shows transactions closed on Micros and will include Lesson Packages, Group Program Revenue, and One to One bookings that are not linked to a package. This report can be used for daily reconciliation.

- **Lessons Delivered -** This report exports a list of all bookings in the schedule within the selected date range including both private sessions and class sessions. This report will show every transaction regardless of the Micros push status and in the case of classes, will show each student registered on a class session and will split the amount based on the number of sessions within the class and how the revenue is attributed to a coach. It does not include bookings that were delivered outside of the date range but closed in the POS within that range and therefore should not be used for payroll purposes.

- **Lesson Packages -** This report exports a list of package sales generated within the selected date range. Only packages closed on Micros will reflect in the Lesson Package Report. The report will show a count of lessons used, remaining lessons, and monetary amount remaining. This report can be used for daily reconciliation.

- **Lesson Closed on Micros -** This report can be generated using the same steps as the Lesson Delivered Report. However, it differs in that it only shows lessons or class sessions based on the date they were closed in the POS, not the date they were delivered in the schedule. This report should be used regularly, ideally on a daily basis, to reconcile activity between the two systems. This report can be used for daily reconciliation.

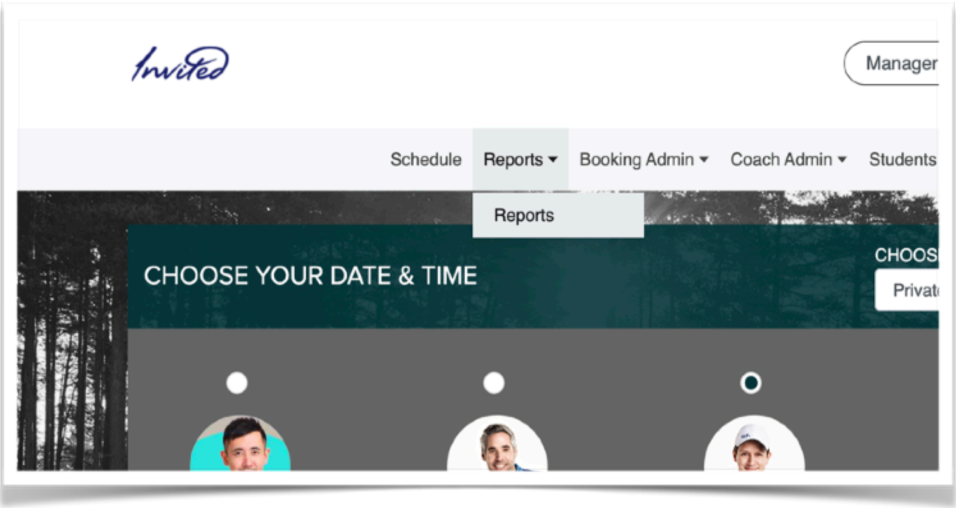
- **Refund Report -** This report allows users to generate exportable reports using various filters and across different time periods. When exported, users can view additional information via two tabs, Lesson Revenue Refunds and Lesson Package Refunds.



Setting Up Weekly Lessons Delivered Report

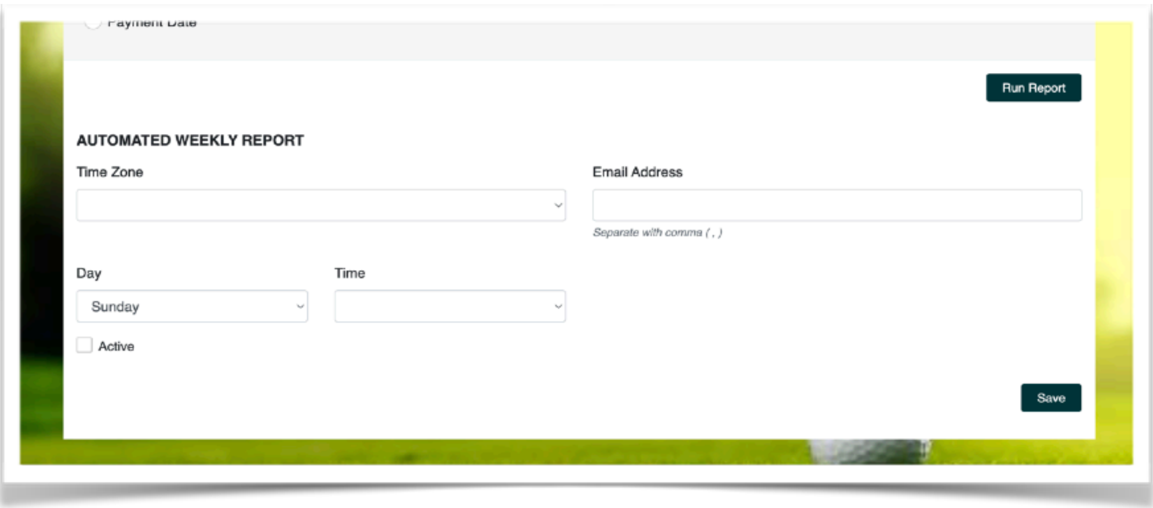
You should ensure as the Manager, that you have setup the Automated Lessons Delivered Weekly Report. This will send you a Lessons Delivered Report for the past 7-day period across your entire coaching team.

To do this, navigate to the Reports:



On this screen, at the footer you can setup the automated report by completing the relevant fields including the time zone, the day and time to receive the report, and the email address the report should be sent to.

The *"Active"* checkbox should be checked and finally click save:



Lesson Revenue Reports

In this exported report, you will each transaction detailed in rows and see the following column names:

- **Club Name -** This is the Academy or Club where the transactions has taken place
- **Club Number -** This number represents the club number, N/A entry in this column identifies that there is no club number associated with the club.
- **Lesson Booked Date -** This column provides the date when the transaction is processed in system.
- **Lesson Date -** This is the date of the lesson or class session in the schedule. For classes with multiple sessions each session will be listed in individual rows across the date range for the report.
- **Student -** First and last name of the student as it appears in the Student profile
- **Membership Number -** This is the primary member ID and the family extension ID separated by -. Blank cell will show for non-members where no primary member or extension number is added.
- **Username -** The username of the player for whom the transaction is processed will appear in this column.
- **Department -** This will display as Golf Programming and Food and Beverage for class sessions. Food and Beverage will only appear when Food and Beverage is assigned in the class builder. The price for the class will be split across the departments for each student.
- **Coach -** First and last name of the coach who delivered the session.
- **Lesson Type -** This is the name of the main filter in the booking system where the lesson or class place was booked
- **Program Type -** This is the name of the sub-filter or duration for one to one lessons in the booking system where the lesson or class place was booked
- **Class Name -** This is the name given to the class by the manager/coach creating the class. In the case of one-to-one filters this cell will remain blank.
- **Transaction Type -** This column identifies whether the transaction is one-time payment or a subscription.
- **Lesson Package Description -** The name of the purchased store product will appear in this column.
- **Price -** This column shows the full price of the transaction.
- **Discount -** This column will hold the discounted amount if a discount is used while processing the transaction.
- **Date Closed on Micros -** This is the date transaction was closed on Micros.
- **Payment Type -** The payment type is the payment preference selected by the students, coach, pro shop or manager user in GLF.Connect.
- **Total Amount -** This is the cost of the lesson or class place after any discount codes have been applied.
- **Subscription Occurrence -** This is to identify the number of total and occurred subscription. This column will only show the value for subscription type transactions otherwise it will contain N/A.

Lesson Delivered Reports

In this exported report, you will see the following column names presented individual rows for each lesson or class session that is delivered in the date range:

- **Club Name -** This is the Academy or Club where the transactions has taken place
- **Lesson Date -** This is the date of the actual lesson or class session in the schedule
- **Time -** This is the start time of the lesson or class session in the schedule.
- **Student -** First and last name of the student as it appears in the Student profile
- **Membership Number -** This is the primary member ID and the family extension ID separated by -. Blank cell will show for non-members where no primary member or extension number is added.
- **Department -** This will display as Golf Programming and Food and Beverage for class sessions. Food and Beverage will only appear when Food and Beverage is assigned in the class builder.
- **Coach -** First and last name of the coach who delivered the session.
- **Lesson Type -** This is the name of the main filter in the booking system where the lesson or class place was booked.
- **Program Type -** This is the name of the sub-filter or duration for one to one lessons in the booking system where the lesson or class place was booked
- **Class Name -** This is the name given to the class by the manager/coach creating the class. In the case of one-to-one filters this cell will remain blank.
- **Date Pushed to Micros -** This is the date the transaction was pushed to micros and will show as N/A for transactions pending to to be pushed.
- **Date Closed on Micros -** This is the date transaction appearing in white was closed on Micros. This will show as N/A for transactions pending to be pushed or pushed to Micros.
- **Payment Type -** The payment type is the payment preference selected by the students, coach, pro shop, or manager user in GLF.Connect.
- **Micros Transaction I.D-** This is the unique identifier for the transaction in Micros.
- **Net Amount -** This is the amount sent to Micros for the Food and Beverage allocation of a class session. Sales tax is added on the POS which will then add up to the total amount
- **Total Amount -** This is the cost of the lesson or class place after any discount codes have been applied.

On this report, transaction rows identified in red are whereby the transaction is pending to be pushed to Micros. Transactions identified in white are closed on micros and those in orange have been pushed but not yet been closed:

Pending Push | Pushed to Micros | Paid via Micros

	Time	Student	Membership Number	Coach	Lesson Type	Program Type	Class Name	Date Pushe
3	10:00~11:00	Lisa Hendricks	Z8763-00	Brad McCollum	Private Lesson	60 Minute Private Lesson		02/09,
3	12:00~13:00	Kaleigh Stephens	Z8404-05	Brad McCollum	Private Lesson	60 Minute Private Lesson		02/07,

When using this report, the aim is get all of the transactions to appear white by the time you run your weekly payroll. This indicates that each transactions has been succesfully Pushed to Micros and Closed. Transaction rows that appear in red, are yet to be pushed and therefore the assumption is that they have either not been delivered or they member or guest has not yet paid. Transactions that are appear in Orange are Pushed to Micros, but the check is waiting to be closed.

Lesson Package Reports

In this exported report, you will see the following column names presented in individual rows for lesson package sale that is processed via the coaching store and closed on Micros:

- **Club Name -** This is the Academy or Club where the transactions has taken place
- **Club Number -** This is the I.D of the club within the GLF. Connect system.
- **Date Closed on Micros -** This is the date the lesson package transaction was closed on Micros.
- **Student -** First and last name of the student as it appears in the Student profile
- **Membership Number -** This is the primary member ID and the family extension ID separated by -. Blank cell will show for non-members where no primary member or extension number is added.
- **Username -** The username of the player for whom the transaction is processed will appear in this column.
- **Coach -** Name of coach against whom the package is purchased will appear in case of customized package, whereas comma separated coaches will appear in case of multiple coaches and “All Coaches” will appear when the package is associated to all academy coaches.
- **Lesson Type -** One to One for one to one package, Group for group credits package and Multi Program for package builder package
- **Transaction Type -** This column identifies whether the transaction is one-time payment or a subscription.
- **Lesson Package Description -** The name of the purchased store product will appear in this column.
- **Price -** This column contains the full actual price of the transaction. Discounts or gift cards used will not have any impact on this price.
- **Discount -** This column contains the discount amount if it is used while processing the transaction otherwise it will show 0.
- **Payment Type -** This column refers to the payment preference used while processing the transaction.
- **Total Amount -** The value in this column will be the same as the Price column if no discount is used against a transaction but it will be different in case of discount.
- **Lesson Info -** It displays short details of used and available credits for the store transactions.
- **Remaining Lessons -** This column specifies the information about store transactions. It contains unbooked or available credits.
- Remaining Amount - This is the specific value amount of credits remaining on the lesson package.
- **Package Status -** This column holds the status of lesson package transactions. If the package is active and available for the player to use it will display “Active” status whereas if the package has been deactivated it will show “Inactive”
- **Subscription Occurrence Number -** If the package transaction is related to a subscription it will show the number of occurrences for the specific transaction whereas if the transaction is not associated with any subscription it will show N/A.

Lessons Closed on Micros Reports

In this exported report, you will see the following column names presented individual rows for each lesson or class session that is closed on Micros within the date range:

- **Club Name -** This is the Academy or Club where the transactions has taken place
- **Lesson Date -** This is the date of the actual lesson or class session in the schedule and may fall outside of the date range.
- **Time -** This is the start time of the lesson or class session in the schedule.
- **Student -** First and last name of the student as it appears in the Student profile
- **Membership Number -** This is the primary member ID and the family extension ID separated by a dash. Blank cell will show for non-members where no primary member or extension number is added.
- **Department -** This will display as Golf Programming and Food and Beverage for class sessions. Food and Beverage will only appear when Food and Beverage is assigned in the class builder.
- **Coach -** First and last name of the coach who delivered the lesson or class session.
- **Lesson Type -** This is the name of the main filter in the booking system where the lesson or class place was booked.
- **Program Type -** This is the name of the sub-filter or duration for one to one lessons in the booking system where the lesson or class place was booked
- **Class Name -** This is the name given to the class by the manager/coach creating the class. In the case of one-to-one filters this cell will remain blank.
- **Date Pushed to Micros -** This is the date the transaction was pushed to Micros.
- **Date Closed on Micros -** This is the date transaction was closed on Micros.
- **Payment Type -** The payment type is the payment preference selected by the students, coach, pro shop, or manager user in GLF.Connect.
- **Micros Transaction I.D-** This is the unique identifier for the transaction in Micros.
- **Net Amount -** This is the amount sent to Micros for the Food and Beverage allocation of a class session. Sales tax is added on the POS which will then add up to the total amount
- **Total Amount -** This is the cost of the lesson or class place after any discount codes have been applied.

This report only shows lessons or class sessions based on the date they were closed in the POS, not the date they were delivered in the schedule and therefore all rows appear as white to indicate the closed on Micros status.

Lessons Closed On Micros Report / 12/01/2024 to 12/19/2024

Club Entity Code	Club Name	Lesson Date	Time	Student	On a Care List	Primary Member I	Extension Member ID	Department	Coach	Program Type	Program Sub Type	Class Name	Date Pushed t
077777	Devteam6	11/27/2024	01:00	Ali student 4	False	NONE	NONE	N/A	qa coach2	One To One Lessons	30 Mins		11/27/2
077777	Devteam6	11/28/2024	20:00	Ali student 2	False	NONE	NONE	N/A	Brad Mccollum	One To One Lessons	60 Mins		11/28/2
077777	Devteam6	11/28/2024	02:15	dev st17	False	NONE	NONE	N/A	qa coach2	One To One Lessons	60 Mins		11/28/2
077777	Devteam6	11/28/2024	00:00	5 test51	False	NONE	NONE	N/A	Brad Mccollum	Furqan 1-2-1	15 Mins		11/28/2
077777	Devteam6	11/28/2024	18:00	dev6 st1	True	NONE	NONE	N/A	Brad Mccollum	One To One Lessons	60 Mins		11/28/2

Refund Reports

In this exported report, you will see the following column names presented in individual rows for Refunds that are processed across the two tabs, Lesson Revenue Refunds and Lesson Package Refunds:

Lesson Revenue Refunds - This tab will display all of the columns as per the Lesson Revenue Report related to original revenue charge for classes and lessons. In addition it will include the following information relating to the Refund Transaction:

- **Date Refund Closed on Micros -** This is the date the refund check was closed on the Micros POS.
- **Total Refund Amount -** This is total amount that was refunded.
- **Refund Payment Type -** The payment type is the payment preference that was selected by the students, coach, pro shop or manager user in GLF.Connect when the initial charge was pushed.
- **Refund Check Number -** This is the 8-digit check number created in Micros for the refunded transaction.

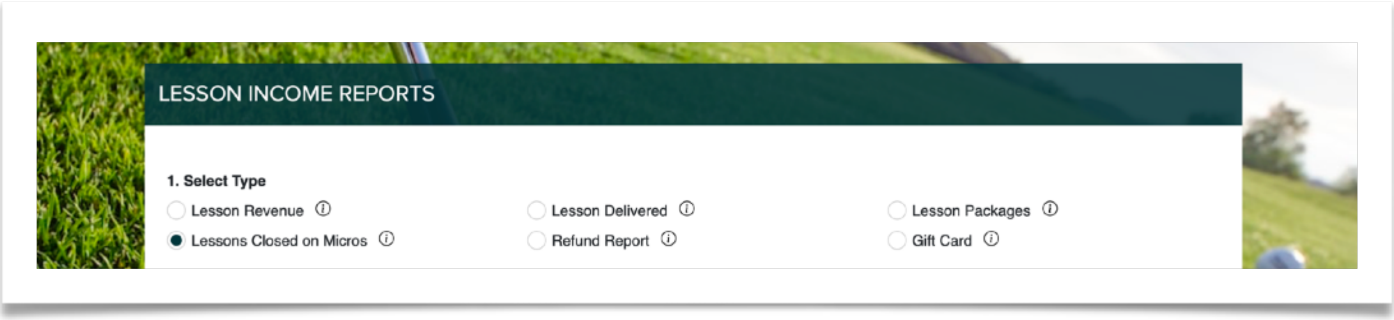
Lesson Package Refunds - This tab will display all of the columns as per the Lesson Package Report related to original revenue charge for Lesson Package charges pushed from the Coaching Store. In addition it will include the following information relating to the Refund Transaction:

- **Date Refund Closed on Micros -** This is the date the refund check was closed on the Micros POS.
- **Total Refund Amount -** This is total amount that was refunded. In the case of partially used packages, this is the amount of lesson credits that were un-used on the package and will therefore differ from the original charge for the package.
- **Refund Payment Type -** The payment type is the payment preference that was selected by the student, coach, pro shop or manager user in GLF.Connect when the initial charge was pushed from the Coaching Store.
- **Refund Check Number -** This is the 8-digit check number created in Micros for the refunded transaction.

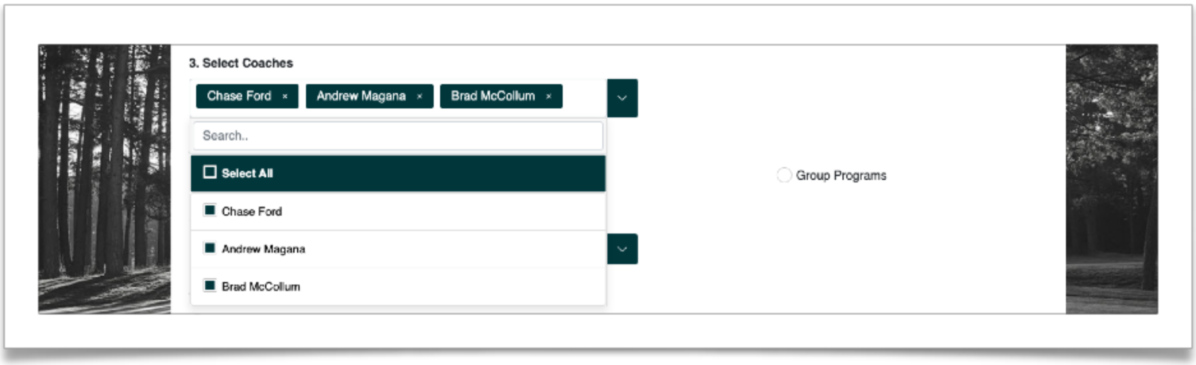
Running a Lessons Closed on Micros Report for Weekly Payroll

You should be using the Lessons Closed on Micros Report for weekly payroll purposes. This report will allow you to see all the lessons and class sessions closed by your team within a date range regardless of the date they appear int he schedule. Follow the steps below to run the report:

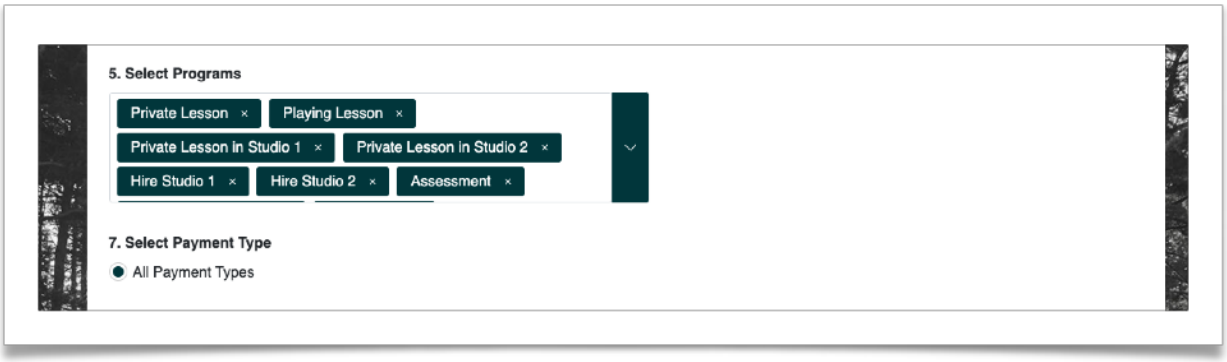
Navigate to Reports from the main menu navigation within the Manager user role and Select Lessons Delivered Reports:



The **'Select Income'** option will be pre-selected and you can move to '**Select Coaches'** that should be included in the exported report. You can use the 'Select All' option but this will select all coaches within your GLF. Connect system including those that have been deactivated. Ensure you have the correct coaches selected before moving to the next step:

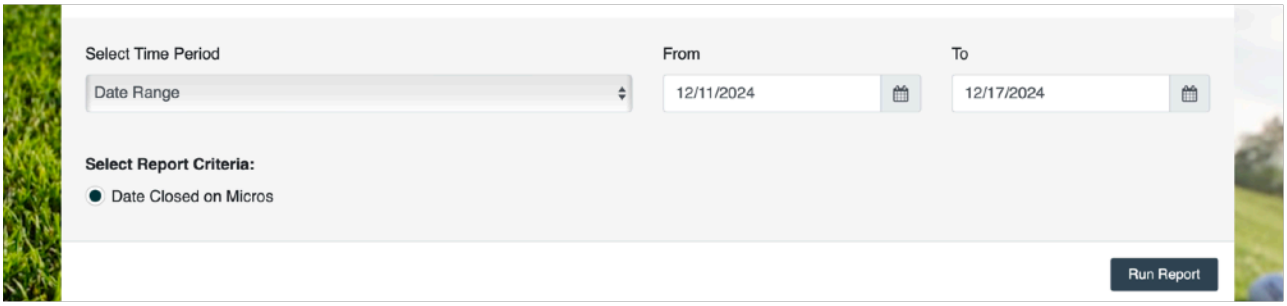


Next, in the '**Select Programs**' option, and one again the 'Select All option can be selected and individual programs can be de-selected if required. We recommend selecting all to ensure that all transactions are captured within the report. The Select 'Payment Type' step will be subsequently completed:

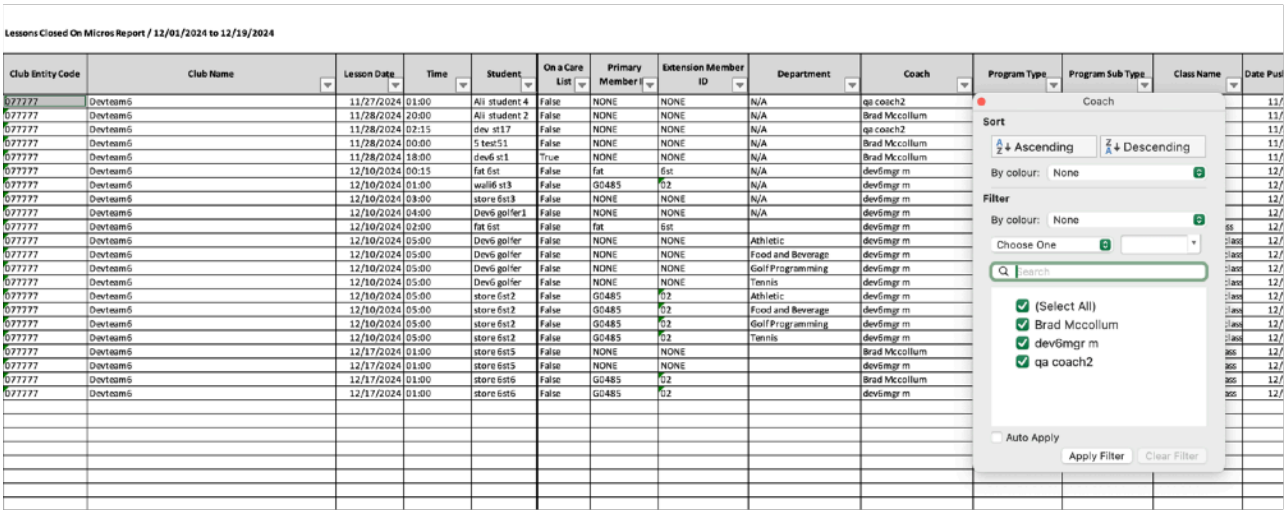


Finally, you need to run the report across the date range required, and when running a report for the purposes of weekly payroll this should be run Wednesday -Tuesday. Select **'Date Range'** from the drop down and then select the dates required from the calendar selection.

Finally, hit 'Run Report' and the report will be exported to your device for you to review:



You should check the report by Coach using the column header filters to ensure that the Report balances with your Micros 'Golf Commission Report'



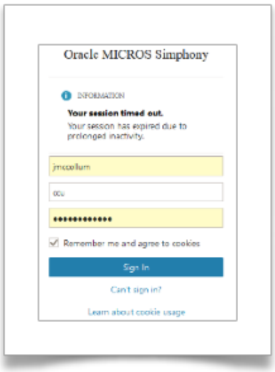
Lessons Closed On Micros Report / 12/01/2024 to 12/19/2024

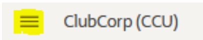
Club Entity Code	Club Name	Lesson Date	Time	Student	On a Care List	Primary Member I	Extension Member ID	Department	Coach	Program Type	Program Sub Type	Class Name	Date Pus
077777	Devteam6	11/27/2024	01:00	Ali student 4	False	NONE	NONE	N/A	qa coach2				11/
077777	Devteam6	11/28/2024	20:00	Ali student 2	False	NONE	NONE	N/A	Brad Mccollum				11/
077777	Devteam6	11/28/2024	02:15	dev st17	False	NONE	NONE	N/A	qa coach2				11/
077777	Devteam6	11/28/2024	00:00	5 test51	False	NONE	NONE	N/A	Brad Mccollum				11/
077777	Devteam6	11/28/2024	18:00	dev6 st1	True	NONE	NONE	N/A	Brad Mccollum				11/
077777	Devteam6	12/10/2024	00:15	fat 6st	False	fat	6st	N/A	dev6mgr m				12/
077777	Devteam6	12/10/2024	01:00	walli6 st3	False	G0485	02	N/A	dev6mgr m				12/
077777	Devteam6	12/10/2024	03:00	store 6st3	False	NONE	NONE	N/A	dev6mgr m				12/
077777	Devteam6	12/10/2024	04:00	Dev6 golfer1	False	NONE	NONE	N/A	dev6mgr m				12/
077777	Devteam6	12/10/2024	02:00	fat 6st	False	fat	6st		dev6mgr m			ss	12/
077777	Devteam6	12/10/2024	05:00	Dev6 golfer	False	NONE	NONE	Athletic	dev6mgr m			lass	12/
077777	Devteam6	12/10/2024	05:00	Dev6 golfer	False	NONE	NONE	Food and Beverage	dev6mgr m			lass	12/
077777	Devteam6	12/10/2024	05:00	Dev6 golfer	False	NONE	NONE	Golf Programming	dev6mgr m			lass	12/
077777	Devteam6	12/10/2024	05:00	Dev6 golfer	False	NONE	NONE	Tennis	dev6mgr m			lass	12/
077777	Devteam6	12/10/2024	05:00	store 6st2	False	G0485	02	Athletic	dev6mgr m			lass	12/
077777	Devteam6	12/10/2024	05:00	store 6st2	False	G0485	02	Food and Beverage	dev6mgr m			lass	12/
077777	Devteam6	12/10/2024	05:00	store 6st2	False	G0485	02	Golf Programming	dev6mgr m			lass	12/
077777	Devteam6	12/10/2024	05:00	store 6st2	False	G0485	02	Tennis	dev6mgr m			lass	12/
077777	Devteam6	12/17/2024	01:00	store 6st5	False	NONE	NONE		Brad Mccollum			ss	12/
077777	Devteam6	12/17/2024	01:00	store 6st5	False	NONE	NONE		dev6mgr m			ss	12/
077777	Devteam6	12/17/2024	01:00	store 6st6	False	G0485	02		Brad Mccollum			ss	12/
077777	Devteam6	12/17/2024	01:00	store 6st6	False	G0485	02		dev6mgr m			ss	12/

Micros Reports

To ensure we have properly integrated Lesson and Program Revenue into the Micros POS, we can use the Golf Commission Report to "compare" against what is reflected within GLF. Connect. The Golf Commission Report is located within Reporting & Analytics. Use your unique provided Username, Company: (CCU) & Password provided based on your department position at the club. The report must be opened using the Firefox browser through:

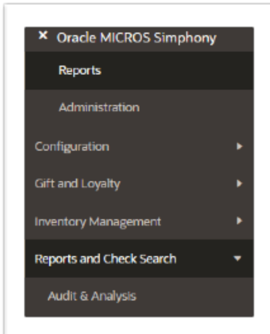
https://ccrp-ohra-idm.oracleindustry.com/oidc-ui/



➢ This report is found when "selecting" the 

from the top left of the log in screen.

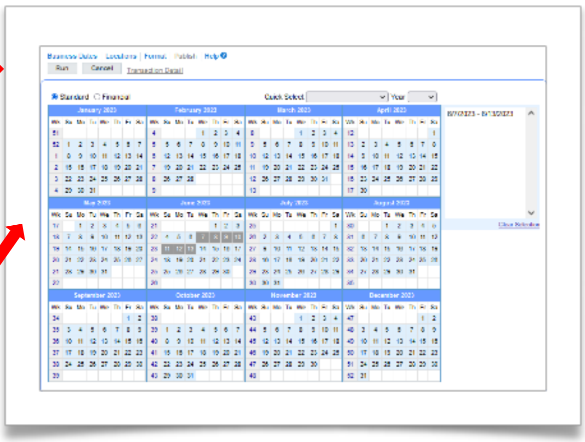
➢ Select "Reports and Check Search" and then "Audit & Analysis:



➢ Select the "Golf Commission Report" from the dropdown options.

➢ Select "Business Dates" from the top left options and first "Clear Selection" from the review box on the right. Then select the date, or date range on the calendar to populate report for this selection.

- To add multiple days, "hold down" the *Ctrl Key*, and then select all additional days for report review.
- Then select "RUN" to process report for the desired date or date range.



The Golf Commission Report will populate the various instructors who will be tied to the Lesson Revenue. The "#" to the right of Player Development or Standardized Program is the same "#" tied to the EP as reflected on the Micros POS Workstation.

This report will also reflect all GLF.Connect "Pushed Checks" that have been "Cancelled". This will result in the duplicate check # with a debit and credit total that offset.

This total can be compared to the GLF.Connect Report to 'confirm' proper revenue "Pushed/Integrated" into Micros POS will be booked toward the correct EP and Lesson Revenue for the department.

Groups	Location	Revenue Center	Check Number	Transaction Date/Time	Line Count	Line Total	Check Employee
Summary Total					**24**	**1,281.50**	
Player Development 1					**2**	**191.50**	
	01119 Test Lab	01119-Golf Shop 1	60102474	6/7/2023 10:11 AM	1	100.00	GLF. Connect User
	01119 Test Lab	01119-Golf Shop 1	60102474	6/7/2023 10:15 AM	-1	(100.00)	GLF. Connect User
	01119 Test Lab	01119-Golf Shop 1	60102476	6/7/2023 10:29 AM	1	91.50	GLF. Connect User
	01119 Test Lab	01119-Golf Shop 1	60102480	6/7/2023 10:43 AM	1	100.00	GLF. Connect User
Player Development 7					**2**	**290.00**	
	01119 Test Lab	01119-Golf Shop 1	60102591	6/10/2023 9:06 AM	1	145.00	GLF. Connect User
	01119 Test Lab	01119-Golf Shop 1	60102591	6/10/2023 9:06 AM	1	145.00	GLF. Connect User
Standardized Program 1					**16**	**712.50**	
	01119 Test Lab	01119-Golf Shop 1	60102512	6/8/2023 9:14 AM	1	25.00	GLF. Connect User
	01119 Test Lab	01119-Golf Shop 1	60102512	6/8/2023 9:15 AM	-1	(25.00)	GLF. Connect User
	01119 Test Lab	01119-Golf Shop 1	60102513	6/8/2023 9:14 AM	1	25.00	GLF. Connect User
	01119 Test Lab	01119-Golf Shop 1	60102513	6/8/2023 9:15 AM	-1	(25.00)	GLF. Connect User
	01119 Test Lab	01119-Golf Shop 1	60102514	6/8/2023 9:14 AM	1	25.00	GLF. Connect User
	01119 Test Lab	01119-Golf Shop 1	60102514	6/8/2023 9:15 AM	-1	(25.00)	GLF. Connect User
	01119 Test Lab	01119-Golf Shop 1	60102515	6/8/2023 9:16 AM	1	25.00	GLF. Connect User
	01119 Test Lab	01119-Golf Shop 1	60102515	6/8/2023 9:18 AM	-1	(25.00)	GLF. Connect User
	01119 Test Lab	01119-Golf Shop 1	60102519	6/8/2023 9:22 AM	1	6.25	GLF. Connect User
	01119 Test Lab	01119-Golf Shop 1	60102521	6/8/2023 9:22 AM	1	12.50	GLF. Connect User
	01119 Test Lab	01119-Golf Shop 1	60102521	6/8/2023 9:23 AM	-1	(12.50)	GLF. Connect User
	01119 Test Lab	01119-Golf Shop 1	60102523	6/8/2023 9:22 AM	1	6.25	GLF. Connect User
	01119 Test Lab	01119-Golf Shop 1	60102528	6/8/2023 9:28 AM	1	28.57	GLF. Connect User
	01119 Test Lab	01119-Golf Shop 1	60102528	6/8/2023 9:29 AM	-1	(28.57)	GLF. Connect User
	01119 Test Lab	01119-Golf Shop 1	60102529	6/8/2023 9:28 AM	1	40.00	GLF. Connect User
	01119 Test Lab	01119-Golf Shop 1	60102529	6/8/2023 9:29 AM	-1	(40.00)	GLF. Connect User
	01119 Test Lab	01119-Golf Shop 1	60102530	6/8/2023 9:28 AM	1	28.57	GLF. Connect User
	01119 Test Lab	01119-Golf Shop 1	60102530	6/8/2023 9:29 AM	-1	(28.57)	GLF. Connect User
	01119 Test Lab	01119-Golf Shop 1	60102560	6/9/2023 9:02 AM	1	100.00	GLF. Connect User
	01119 Test Lab	01119-Golf Shop 1	60102561	6/9/2023 9:02 AM	1	100.00	GLF. Connect User
	01119 Test Lab	01119-Golf Shop 1	60102562	6/9/2023 9:02 AM	1	100.00	GLF. Connect User
	01119 Test Lab	01119-Golf Shop 1	60102563	6/9/2023 9:06 AM	1	50.00	GLF. Connect User
	01119 Test Lab	01119-Golf Shop 1	60102564	6/9/2023 9:06 AM	1	50.00	GLF. Connect User
	01119 Test Lab	01119-Golf Shop 1	60102565	6/9/2023 9:06 AM	1	50.00	GLF. Connect User
	01119 Test Lab	01119-Golf Shop 1	60102569	6/9/2023 9:10 AM	1	25.00	GLF. Connect User
	01119 Test Lab	01119-Golf Shop 1	60102571	6/9/2023 9:10 AM	1	25.00	GLF. Connect User
	01119 Test Lab	01119-Golf Shop 1	60102573	6/9/2023 9:10 AM	1	25.00	GLF. Connect User
	01119 Test Lab	01119-Golf Shop 1	60102575	6/9/2023 9:14 AM	1	25.00	GLF. Connect User
	01119 Test Lab	01119-Golf Shop 1	60102577	6/9/2023 9:14 AM	1	25.00	GLF. Connect User
	01119 Test Lab	01119-Golf Shop 1	60102579	6/9/2023 9:14 AM	1	25.00	GLF. Connect User
	01119 Test Lab	01119-Golf Shop 1	60102588	6/9/2023 11:29 AM	1	50.00	GLF. Connect User
	01119 Test Lab	01119-Golf Shop 1	60102588	6/9/2023 11:29 AM	1	50.00	GLF. Connect User
	01119 Test Lab	01119-Golf Shop 1	60102589	6/9/2023 11:29 AM	1	50.00	GLF. Connect User
	01119 Test Lab	01119-Golf Shop 1	60102589	6/9/2023 11:47 AM	-1	(50.00)	GLF. Connect User
	01119 Test Lab	01119-Golf Shop 1	60102590	6/9/2023 11:29 AM	1	50.00	GLF. Connect User
	01119 Test Lab	01119-Golf Shop 1	60102590	6/9/2023 11:47 AM	-1	(50.00)	GLF. Connect User
Standardized Program 2					**4**	**87.50**	
	01119 Test Lab	01119-Golf Shop 1	60102520	6/8/2023 9:22 AM	1	6.25	GLF. Connect User
	01119 Test Lab	01119-Golf Shop 1	60102520	6/8/2023 9:23 AM	-1	(6.25)	GLF. Connect User
	01119 Test Lab	01119-Golf Shop 1	60102522	6/8/2023 9:22 AM	1	12.50	GLF. Connect User
	01119 Test Lab	01119-Golf Shop 1	60102524	6/8/2023 9:22 AM	1	6.25	GLF. Connect User
	01119 Test Lab	01119-Golf Shop 1	60102524	6/8/2023 9:23 AM	-1	(6.25)	GLF. Connect User
	01119 Test Lab	01119-Golf Shop 1	60102570	6/9/2023 9:10 AM	1	25.00	GLF. Connect User
	01119 Test Lab	01119-Golf Shop 1	60102570	6/9/2023 9:12 AM	-1	(25.00)	GLF. Connect User
	01119 Test Lab	01119-Golf Shop 1	60102572	6/9/2023 9:10 AM	1	25.00	GLF. Connect User
	01119 Test Lab	01119-Golf Shop 1	60102572	6/9/2023 9:11 AM	-1	(25.00)	GLF. Connect User
	01119 Test Lab	01119-Golf Shop 1	60102574	6/9/2023 9:10 AM	1	25.00	GLF. Connect User
	01119 Test Lab	01119-Golf Shop 1	60102574	6/9/2023 9:11 AM	-1	(25.00)	GLF. Connect User
	01119 Test Lab	01119-Golf Shop 1	60102576	6/9/2023 9:14 AM	1	25.00	GLF. Connect User
	01119 Test Lab	01119-Golf Shop 1	60102578	6/9/2023 9:14 AM	1	25.00	GLF. Connect User
	01119 Test Lab	01119-Golf Shop 1	60102580	6/9/2023 9:14 AM	1	25.00	GLF. Connect User

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 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.