TenFore Training Manual

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Birdie

Logging In

1. **Enter Your Pin:**
   - Use the pin you created based on the role assigned to you in the portal.
   - Restaurant employees will see only restaurant options, while pro shop employees will see either restaurant options, pro shop options, or both depending on their role.
2. **Accessing Main Menu:**
   - Click the **three-lined button** in the top left corner.
   - This menu provides options for pro shop, restaurant, customer service, booked play times, and pro shop orders.

Tee Sheet Overview

1. **Viewing Options:**
   - There are three viewing modes: **Grid, List, and Multi**.
   - Larger courses typically use **List** or **Multi** to show more tee time details.
2. **Tee Sheet Icons:**
   - **Golf cart emoji**: Players using carts.
   - **Walking emoji**: Players walking the course.
   - **World emoji**: Players who booked online.
3. **Price Display:**
   - Shows booking price, which changes from **navy to green** once the player has checked in.
4. **Color Coding:**
   - **Light blue**: Group bookings.
   - **Orange**: Events.
5. **Tee Time Settings (right side button):**
   - **Squeeze in times** before or after bookings.
   - **Clear times**, **clone bookings**, or **move players**.
6. **Navigation:**
   - Use **arrows** to move between past and future dates.
   - The **calendar view** lets you select specific dates.

- The top drop-down menu allows you to select and switch between courses. The bottom drop-down is for selecting sub-courses.

7. **Pro Shop Access:**
   - Click the **Pro Shop** button at the bottom to access and check people in for items such as golf balls, shirts, hats, etc.
8. **Other Features:**
   - The **three dots** icon in the top right corner lets you access **Reset Day**, **Bulk Squeeze**, and **Important Events**.

Booking a Tee Time

1. **Booking Process:**
   - Select the date and time.
   - Search the customer by name, email, or phone number.
   - Hit **Reserve**, select their form of transportation, number of holes, and guests.
2. **Booking Management:**
   - To add more players, search their name and hit **Reserve**.
   - Options include **Cancel**, **No Show**, **Clone**, **History**, and **Cart Sign-Out**.
   - **Cart Key** indicates if the cart key was returned.
3. **Immediate Checkout:**
   - Add the booking to the cart and process payment directly from the cart.
4. **Group & Event Bookings:**
   - Hold down on tee times, then in the top right corner, select **Players**, **Block Times**, or **Create Groups**.
5. **Player Database & Notes:**
   - Use the **Players** option to view the player database.
   - Select **Golf** to view notes, which can be set to public for customers using the booking engine.

Pro Shop

1. **Product Groups:**
    - All product groups are created in the portal, and **Photo Op** is required for setup.
    - **Memberships** and **Gift Cards** are automatically created and cannot be changed in the Pro Shop.
2. **POS Functions:**
    - **Pop** is for the cash drawer.
    - **Anonymous** is for tying players/customers to orders.
    - **Combos** are created in the back end for items like golf balls and drinks.
3. **Checkout Process:**
    - If a customer has a card on file, easily check them out.
    - For manual payments, enter the card details, and use **Pay with Tip** to allow the customer to add a tip.
4. **Gift Cards & Memberships:**
    - Search for gift cards or memberships under the **Member** section.
5. **Split Payments:**
    - Enter the cash amount and process the rest via card.
6. **Court Sheets:**
    - Register and schedule people to tennis, basketball courts, etc.
7. **Order Lookup:**
    - View Pro Shop orders sold through the POS.
8. **End of Shift:**
    - Mark the end of your shift at the bottom where the customer search is. Enter the total amount of cash collected for the day.
9. **Clocking In/Out:**
    - Use the **Time Clock** to clock in and out.

Restaurant Section

1. **Features:**
    - View **Quick Orders**, **Tabs**, **Tables**, **Scheduled Reservations**, and **Customer Orders/Tips**.
2. **Customer Lookup:**

  - View customer details, including tee time history, email, name, memberships, and gift cards.
3. **Card Management:**
   - Add a customer's card by swiping or entering their details manually.
4. **Adding Customers:**
   - Use the **plus button** to add new customers by entering their first and last name, email, phone number, and birthday.
5. **Events:**
   - View event items and take payments through the event interface.
6. **Inventory Management:**
   - Add or subtract inventory items in the **Inventory** section.
7. **Settings:**
   - Add new tablet IDs into the portal from the **Settings** menu.

Creating Combos in Birdie

1. **Combo Creation for Different Departments**:
   - To have a combo available in multiple departments, you must create it twice, once for each department.
2. **Combo Details**:
   - **Title**: Name of the combo.
   - **Description**: Brief description of the combo.
   - **Department**: Select the department.
   - **Products**: Add products to the combo by searching for them.
     - Example: If you want to add two Dr. Peppers to a combo, search for Dr. Pepper, select it, and specify "2" as the quantity.
   - **Pricing**: You can set different prices for products within the combo compared to their individual prices.
     - Example: If Dr. Pepper is normally $5, you can set it at $2 within a combo.
3. **Adding Products to a Combo**:
   - Continue adding all relevant products to the combo. Each added product will appear on the list.
4. **Pro Shop Combos**:
   - In the Pro Shop, combos are managed under the **Combos** button.
   - Selecting a combo will automatically add all the associated products to the left side of the screen, so you don't have to manually select each item.

Price Stickers Setup

1. **Sticker Printer Types**:
   - **Star Printer**: The primary option for printing price stickers.
     - It's slightly larger than the MC3 printer, and most courses are transitioning to this model.
   - **Avery and Dymo Printers**: Older printer models still in use, but they have limitations. Avery, for example, only prints starting from the top of the page, so partial pages can't be reused.
2. **Printing Stickers**:
   - **Product Selection**:
     - Example: Select an item like "Logo Ball," and specify the quantity of stickers.
   - **Paper Type**:
     - Example: Choose a 3x1 paper with a black line. This black line helps align the stickers properly when printing.
   - **Printing Process**:
     - Adjust the settings to ensure the sticker prints in the correct area of the paper.
     - You can add secondary labels, like "Member Price" or a secondary price, if needed.
     - Select the designated printer and hit print to generate the stickers.
3. **Secondary Labels**:
   - If the product has a member-specific price, you can add a secondary label to indicate this, along with the default sticker.
4. **Sticker Limitations with Avery Printers**:
   - Avery stickers require starting from the top of the page and do not allow selecting a specific starting position (e.g., you can't start from the 13th sticker if the first 12 have already been used).
   - You will need to print on a fresh sheet of paper.

Product Group Setup

1. **Adding Product Groups**:
   - Before adding products, ensure that product groups (or families) are set up.
     - Example: Set up product groups like "Pro Shop Merchandise" to categorize items properly in reports.
2. **Associating Products with Groups**:
   - Once product groups are created, you can assign products to the appropriate group for organizational and reporting purposes.

Booking and POS System Overview

1. **Booking Engine Usage**:
   - Some golf courses use **only** the booking engine and do not utilize Tenfore's POS system.
   - Example: **Hogan Park** and **City of Everilla** only use the booking engine and check out with a regular POS system.
   - No T-sheet integration is required for these courses.
2. **Booking Plan Setup**:
   - Courses either use the **full plan** or **booking-only** mode. In most cases, the full plan is recommended for all courses.
   - **Note**: Red labels or indicators are visible only to the support team and are not shown to the golf course staff.

Tablet Management and Switching Golf Courses

1. **Accessing and Managing Tablets**:
   - Navigate to the **Tablet** section within Tenfore to view and manage all tablets.
   - Tablets are listed in alphabetical order, making it easy to search for a specific course
   - If you encounter an issue, you can temporarily switch your tablet to another golf course for troubleshooting.
2. **Switching Golf Courses on a Tablet**:
   - To switch your tablet to another golf course:
     - **Search** for the desired golf course.

        - **Select** the course.
        - Click **Save** to switch.
        - **Log out** and then log back in to complete the switch.
    - Example: If you switch to "Astro Creek," your tablet will now be configured to view and manage that course.
    - **Live Environment**: Any actions you take while switched to another course (e.g., making a cash sale in the Pro Shop) will be recorded in that course's system, so be cautious.
3. **Troubleshooting Course-Specific Issues**:
    - After switching to a course, you can review their setup and troubleshoot any issues, such as navigating to a recent tee time and testing the system.
    - When finished, always **switch back** to your original golf course.
4. **Tablet Login Credentials**:
    - Most golf courses use the following default logins:
        - **55555** for most courses.
        - **2626** for Sandhills.
    - Use these credentials when switching to another golf course.

Managing Images for Products

1. **Adding Images to Products**:
    - Images for products displayed in Tenfore are typically sourced from Google searches.
    - Store these images in a folder on your computer for future reuse to avoid repeated searches.
2. **Customizing Product Images**:
    - Courses can replace generic images with actual photos from their Pro Shop by uploading them to the system.

Tablet ID and Configuration Adjustments

1. **Switching Tablet IDs**:
    - Some older versions of Tinfore may require manual adjustments to the **Tablet ID**.

   - The ID can be retrieved from the error list and updated to ensure the tablet functions properly.
2. **Reassigning Tablets**:
   - If needed, reassign a tablet by performing **eight quick clicks** on the logo, which allows for reassignment.
3. **Finalizing Changes**:
   - After making any changes, remember to hit **Save** to ensure the changes take effect.
   - For example, after switching to "Dunes," confirm the changes by saving and logging back into the course.

Creating and Managing Accounts

1. **Creating Test Accounts**:
   - If you need to test features or configurations, you can create a test account for yourself under any golf course.
   - Log in as an employee and perform tasks to simulate real-world scenarios.
2. **Logging Back into Your Account**:
   - After testing or switching courses, remember to log back into your original account.

Dashboard

- The **Dashboard** is the main hub where you can view and manage integrations such as Golf Genius, QuickBooks, tabs, and settings.

Restaurants

- **Guest Check-In Methods:**
    - **Quick Order Check-In:** For immediate service needs like turn house orders or kitchen orders.
    - **Running Tabs:** Allows guests to accumulate orders throughout their visit.
    - **Table Check-In:** For seated guests, including those at the bar.
- **Reservations:**
    - Add reservations based on the schedule set in the portal.
    - Input and save notes for future access (e.g., for special events).
- **Order Management:**
    - Modify orders for specific items.
    - Move items between seats, change quantities, add notes, apply discounts, or delete items.

Quick Orders

- Access product groups through the **Quick Orders** screen.
- Create and manage menus (e.g., Dinner Menu or 19th Hole) via the back end, with price adjustments based on day or time.
    - Example: Set a happy hour price for a beer from $5 to a special rate.
- **Open Food:** For items not listed as products, allowing you to manually add a price and note.
- **Tabs:** Display currently running tabs.
- In the payment screen, you can adjust prices for items on specific courses.

Golf Genius & QuickBooks

- **Golf Genius Tab:**
    - View rosters and download players into Tenfore and the tee sheet.
- **QuickBooks Tab:**
    - Manage QuickBooks integrations, codes, and accounts.
- **Integrations Tab:**
    - Add, edit, or delete integrations by selecting a course partner, API key, and partner account number.

Order Management

- **Adding an Order:**
    - Go to **Orders > Add Order** or **Orders > All Orders**, then click "Add Order."
    - Select a department (e.g., Restaurant, Pro Shop, Events, Online).
    - Add items to the order once an order ID is generated.
- **Managing Payments:**
    - Ensure the order total matches the payment total.
    - Once matched, mark the order as **Complete**.

Rain Check Handling

- Rain checks work like gift cards and are linked to a customer's account.
- A receipt is printed for redemption on their next visit.

Reports

- **Generating Reports:**
    - By date or date range.
    - For specific items, showing only orders containing that item.
- **Product Group Reports:**
    - Select a group (e.g., beer) and filter sales, such as Bud Light within a date range.

- **GL Code Reports:**
    - Run reports based on General Ledger (GL) Codes.
    - Reports can be downloaded in Excel or PDF, or printed directly from the portal.

Refunds

- **Refund Reports:**
    - Search by date range and view details like Order ID, Refund Status, and Refund Reason.
- **Processing Refunds:**
    - In the Pro Shop, click the three dots or use the Restaurant section to select and refund an order.

Chargebacks

- **Creating New Orders for Chargebacks:**
    - For errors, create a new order, credit back to the customer’s account.
    - Done through Pro Shop by looking up the customer and adjusting fees or quantities.

Additional Features

- **Pending Tabs & Orders:**
    - Manage running totals and make updates as needed.
- **Charge Adjustments:**
    - Use negative values for refunds or credits.

Memberships

1. **Memberships Tab**:
   - Displays all available memberships for sale or customer addition.
   - **Adding a new membership**: Click the green button, enter details like the title and duration (months).
   - Membership duration (1 = monthly, 12 = yearly). If auto-renew is enabled, the system will extend the membership accordingly.
2. **Members Tab**:
   - Lists all current, expired, and on-hold memberships.
   - Use filters to sort by type (e.g., seasonal membership).
   - Auto-renew settings and expiration dates are displayed here.
3. **Member Spending Tab**:
   - Tracks minimum purchase requirements (e.g., food, beverages).
   - You can charge the difference if a member doesn't meet the required spending.
4. **Members' Addresses Tab**:
   - Stores and manages member contact details.
5. **Members Sold Tab**:
   - Displays membership sales and details for financial reporting.

Adding a New Membership

1. Click the **green "Add" button**.
2. Input:
   - **Title**: Name of the membership.
   - **Duration**: In months (1 for monthly, 12 for yearly).
   - **Auto-renew**: If enabled, renews membership at the specified interval.
3. Configure **Minimum Purchase Requirements**:
   - Set quarterly or annual minimum spending.
   - Specify if the requirement applies to all purchases or only food and beverage.
4. Choose how to handle the **first month charge**:
   - Full charge, prorated based on purchase date, or free first month.
5. Set the **expiration type**:
   - First or last day of the month for expiration when the membership renews.

Setting Membership Discounts

1. After saving a membership, a section for **membership discounts** will appear.
   - Click **Add** to link available discounts (created under the products section) to the membership.
2. Discounts are automatically applied to purchases once the customer is linked to the membership.

Managing GL Codes & Pricing

1. Attach **General Ledger (GL) Codes**:
   - Select from available codes. The system will record transactions under the selected code.
2. Set **Membership Prices**:
   - Option to include tax either before or after price calculation.

Membership Renewal and Expiration

1. Members can have automatic renewals based on the expiration date and duration set.
2. To cancel auto-renewal:
   - Uncheck the **auto-renew** box next to the member's name.
   - Upon expiration, the membership will not renew and move to the expired list.
3. Bulk charging for events or fees:
   - Select members and apply bulk charges (e.g., hole-in-one fees).

Bulk Orders and Charges

1. **Bulk Orders**: Charge all members of a specific membership type for fees, such as events or special charges.

2. Create orders in bulk by selecting the **bulk order** option and confirming charges for the selected members.

Member Profiles

1. Each member has a **GC customer profile** linked to their memberships.
    - This includes contact info, payment methods (credit/ACH), and delivery preferences (email, mail, or both).
2. The profile also lists all active or expired memberships.
3. You can **resign** a membership by selecting a date and providing a reason.
