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Accessing Your Tools

Slack direct URL: <https://clubessential.slack.com>

Zoom direct URL: <https://clubessential.zoom.com>

Office 365 Handbook

<https://clubessentialholdings.sharepoint.com/:w/s/educationteam/EatII Gy2mWVFqOkJAZxrHOABLI mWA3aB11hH756uSzC2Bg?rtime=4mhwg40s20g>

Corp ID: firstintialfulllastname (i.e., dscott)

Password: firstintialfulllastname

<https://admin.clubessential.com>

Citrix ID: firstintialfulllastname (i.e., dscott)

Password: Hotpage123!

Bomgar/Representative Console credentials:

URL: <https://help.clubessential.com/login>

Login: First Initial last name

Password: Hotpage123!

Salesforce

<https://clubessential.lightning.force.com/lightning>

Should have received an email with your login instructions

ReServe (Banquets)

<https://www.reservecloud.com/login>

Login: email

Password: Hotpage123!

KDS (Kitchen Display System)

Kds.clubessential.com

Username: * or Admin Credentials

Password: Refer to Admin PW

NOTE: Consider using a Password Manager like Last Pass to keep up with the considerable number of Passwords required. In addition, consider using AutoHotKey for quick password entry.

Educational Resources

Client Resource Center (Public Access) - Atlassian/Confluence
<https://clubessential.atlassian.net/wiki/spaces/OF/overview>

Internal KB - Salesforce Knowledge

<https://clubessential.lightning.force.com/lightning/r/Account/0014000000K3aqwAAB/view>

Litmos/Online Learning

<https://clubessentialclient.litmos.com/dashboard>

Should have received an email with your login credentials

Submit an EDU case – education@clubessential.com

Glossary

| | | |
|----------------------------|--|----------------------|
| A/P | Abbreviation for Accounts Payable | Office |
| A/R | Abbreviation for Accounts Receivable | Office |
| Accounts Payable | When a company orders and receives goods (or services) in advance of paying for them, we say that the company is purchasing the goods on account or on credit. The supplier (or vendor) of the goods on credit is also referred to as a creditor. If the company receiving the goods does not sign a promissory note, the vendor's bill or invoice will be recorded by the company in its liability account Accounts Payable (or Trade Payables). At a Club, frequent Accounts Payable may result from purchasing goods for the Pro Shop, Food to serve in the Dining Halls, Maintenance and Repairs, etc. | Office |
| Accounts Receivable | A current asset resulting from selling goods or services on credit (on account). Invoice terms such as (a) net 30 days or (b) 2/10, n/30 signify that a sale was made on account and was not a cash sale. Most Clubessential Client Receivables have to do with Member Dues and other charges they incur throughout the month. | Office |
| API | Abbreviation for application programming interface (API) - used in conjunction with other Products - allows our products to talk to other products and receive information from other products. | Suite |
| Batch | A collection of transactions. Depending on the nature of the batch, there may be a collection of A/P Invoices to Pay, POS transactions, Member Statements, etc. These items do not hit the G/L until they are "posted" in the form of a batch. The batch is like the house that the transactions live in. | Office |
| Book a Tee Time | Refers to when someone would like to make a reservation to play golf at a specific time. Typically, Members can book their own tee times via our App, or Reservations system, or a Club Administrator (Golf Pro) can assist Members with making these reservations. | Reservations, Mobile |
| Branded App | Individualized version of the Clubessential mobile app that is developed with the club's unique branding that requires a Club ID to sign in. It can be found in the Google Play Store or the Apple App Store under the name of the club. | Mobile App |
| C-Books/Flips | Digital, interactive PDFs. CE provides C-Book services for a fee with a contract. | Website |

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| Caddie | Person who carries a player's golf bag and gives advice. Clubessential's tee times system has a caddie management program which allows for caddies to be assigned. | Reservations |
| CE | Abbreviation for Clubessential - See Clubessential for more info | All |
| CEAdmin Dashboard | Internal application that contains useful links pertaining to Clients and their sites, as well as Clubessential Employees | Clubessential Internal |
| Check Run | The process of selecting Vendors for payment, and "cutting" checks, or issuing electronic payments is referred to as a Check Run. | Office - Accounts Payable |
| Chit | Transaction level detail often refers to a ticket from the POS. | Office |
| Client Resource Center | CE's internal knowledge base should have this in your email signature (kb.clubessential.com) and highlight when clients have questions. This is also the place clients can sign up for upcoming Webinars. | All |
| Closure Code | Code applied to a ticket when it is resolved in Desk to indicate how the case was solved. These are used to help identify areas for additional education, development enhancements, and identify other trends. | Client Support |
| Club Intelligence | Module within the Office Product that links back to the Client Resource Center from directly within the product. | Office |
| Clubessential Blog | Client facing blog that covers several topics such as: product education, best practices, and company culture highlights | Education/Marketing |
| Clubessential Facebook Account | @Clubessential.Cenetic | Education/Marketing |
| Clubessential Linked In Account | @Clubessential | Education/Marketing |
| Clubsoft | Name of Company that Clubessential acquired/merged with in 2014. Clubsoft had the backoffice/accounting product built on the same platform as Clubessential's Website and Reservations Product, so were a natural fit to become the full package Suite and dominate the Club Industry Market. | Office |
| CMA | Stands for Clubessential Management Application. This is the "Back End" of the Office product, that contains the following Modules (Accounts Payable, General Ledger, Guest Rooms, Membership, Reporting, etc.) to account for Club's transactions and financial reporting needs. | Office / Website |
| CMS | Abbreviation for Content management system. CE offers CMS for website products which allows users to update and manage content on their own. | Website |

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| Community Feed | The Community Feed allows both club administrators and members to make posts, comment, and like existing posts to encourage communication around the club. | Mobile App |
| Container App | Basic version of the Clubessential mobile app that requires a Club ID to sign in. It can be found in the Google Play Store or the Apple App Store under the name Clubessential. | Mobile App |
| Content Loading | Refers to a process and a department within Clubessential. The Content Loading Department offers Content Loading services by which the team loads content and imagery provided from the client to a new website. | Website |
| Controller | Head of accounting. | Office |
| CRC | Abbreviation for Client Resource Center; kb.clubessential.com | Education/Marketing |
| Credit Book or Sweeps | A Credit Book is established by Clubs to distribute money (oftentimes prize money for tournaments, Hole in Ones, or other contests) in the form of credit to its members. Members can then use the credit to purchase allowable items at the Club. Credits will oftentimes have an expiration date, and a stipulation that will either allow or disallow other family members to use the credit. | Office |
| CRM | Customer Relationship Management. Tool CE sells for clubs to manage member data and prospect's data to in turn use for marketing practices (reports, targeted email marketing). | CRM |
| CSS | Cascading Style Sheet | Website |
| CSV | Comma Separated Values, usually referencing imports into or exports out of the system | Website, Office |
| Data Genie | Reporting tool embedded in Office to gather data (mostly sales related); pivot table like in effect and can make subscriptions in this tool. | Office |
| Design | Refers to team within clubessential that designs websites | Clubessential Internal |
| Desk | Call tracking software used currently by support teams | All Products - Client Support/Service |
| Dev | Abbreviation for Development, Team that develops our Products (Website, Office, etc.) | Clubessential Internal |
| Dev Updates | Refers to updates (enhancements and bug fixes) the Development team makes to Clubessential Products as defined by the Product Roadmap. Clubessential uses Agile development | Clubessential Internal - All Products - Development |
| DNS | DNS: Stands for Domain Name System, see here for a good explanation. If we control a club's DNS, our IT team can make changes for a client. | IT - General |

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| Editor | Tool used to edit content and imagery on the website. The Editor can be access by opening a Click to Edit when visible in a section. | Website |
| Education | Department within Clubessential that is responsible for internal and external product training, onboarding training. | Clubessential Internal |
| FED | Abbreviation for Front End Developer (creates our Client's Websites and Reservations Systems) | Clubessential Internal |
| Filter | Something that works like a filter, as by removing, blocking, or separating out certain elements. Filters are usually associated with the Calendar and Search elements of the website to obtain desired data. Similarly, filters may also be found in the Office product to define results returned in a grid. | Website/Office |
| Finance/Accounting | This department is responsible for our Financial Statements, and all operations pertaining to their creation; from Contract Generation associated with a Sale, billing our customers, to paying for services related to our business (Accounts Payable), to paying our Teammates (Payroll), to Financial Statement Generation. Systems currently used in accounting include: Salesforce, Steelbrick (Contract System), Intacct (financial system), and Paycor (Payroll/HR). | Clubessential Internal |
| Department | | |
| Financial Report Writer | Reporting creating tool for Office users to have customizable financial reports--Balance Sheet or Income Statements primarily | Office |
| Front 9 and Back 9: | Front 9 are the first 9 holes of a golf course and the back 9 is the Second 9 holes. | Reservations - Tee Times |
| G/L | Abbreviation for General Ledger | Office |
| General Ledger | The backbone of the Office application and what all part of Office feed to for financial tracking for the club | Office |
| GHIN | Online Handicap Computation Services for Golf. 3rd party system we interface with. We do not service GHIN. | Reservations - Tee Times |
| GM/General Manager | Runs the club, and generally reports to the Board of Directors (oftentimes made up of Members of the Club) | Club Industry |
| Gofer | CE's proprietary software that we install on club server that extracts statement/financial data from 3rd party accounting systems. Once it extracts the data, it packages it into XML files containing the data in an organized structure. | Website |
| Guest Rooms | Module to 'book' or reserve a room at clubs that offer this feature for members | Office |
| Guests | A person the club is tracking that is NOT a member account | Office |
| GURL | Generic url. Module used in sitebuilder to interface with many 3rd party systems that require a login. GURL is a CE term that refers to an SSO or single sign-on, which allows you to log in | Website |

once to the CE site and get automatically passed through to a third-party site without entering credentials.

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| Hamburger | Royal TS - Office system used to access clients on Office. Called Hamburger because Royal reminded the team of Burger King, so they re-named this system unofficially Hamburger. Note - you need to be on VPN to establish a remote connection with this system. | Office |
| HTML | Hyper Text Markup Language | Website |
| In-App Messaging | In-App Messaging allows for immediate communication between your staff and members. Clubs can determine the list of staff that will be available to be messaged by members. | Mobile App |
| Interactive Reports | Standard list of reports available in Office--most commonly used by all clubs | Office |
| Inventory | The value of materials and goods held by an organization (1) to support production (raw materials, subassemblies, work in process), (2) for support activities (repair, maintenance, consumables), or (3) for sale or customer service (merchandise, finished goods, spare parts). Inventory is often the largest item in the current assets category and must be accurately counted and valued at the end of each accounting period to determine a company's profit or loss. Inventory at a Club is typically associated with the Golf Pro Shop - items a Club would buy, have on-hand, and re-sell. (Golf Clubs, Golf Balls, Golf Shirts, Pants, etc.). This is also a Module within the Office system. | Office |
| Item Categories | An Item Category is a fundamental component of the Office system. A Category represents a collection of Items and is a subset of a Group. An Item can only belong to one Category and one Group. An unlimited number of Items may exist in a Category, and an unlimited number of Categories may exist in a Group. A Category fits into one of (3) areas: (1) Food and Beverage, (2) Retail, or (3) Billing. Item Categories have a Child Relationship to Groups, and a Parent Relationship to Items. Therefore, a Group must first exist before an Item Category can become a member of it. And, an Item Category must exist before an Item can be added to it. | Office |
| Item Combos | Item Combos allow you to sell multiple Items as a single charge through the Point-of-Sale System. Example - Item Combo could be Father/Son Tournament, and it consists of two Items, a cart fee, and a greens fee. | Office |

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| Item Groups | The Item Setup consists of three tiers: Items, Categories, and Groups. All Items belong to a Category, and all Categories belong to a Group. Example of a Tier - Food (Item Group), Entree (Item Category), Lobster Ravioli (Item), 8oz Steak (Item), Trout w/Cream Sauce (Item) | Office |
| Items | An Item is a fundamental component of the Office system. Anything chargeable to a Member/Guest must be set up as an Item. An item fits into one of (3) categories: (1) Food and Beverage, (2) Retail, or (3) Billing. Items have a Child Relationship with Categories, which have a Child Relationship with Groups. Therefore, a Group, and a Category must first exist before an Item can be added to the system. Items are considered a "Module" within the Office system. | Office |
| Javascript/Jquery | JavaScript is a programming language used to make web pages interactive. | Website |
| Jonas | 3rd party accounting and web company. Many of CE's clients use Jonas for their accounting. We interface with Jonas using RS and Gopher. | Competitor |
| Lottery | Term used in golf and in the Tee Times application whereby members will have tee time starting times determined by random. | Reservations |
| M3 Team | Team within Clubessential that offers SEO and content design services. | Clubessential Internal |
| Marketing | Team within Clubessential that is responsible for product and sales marketing. | Clubessential Internal |
| Member Statements | Refers to the statement window in which financial data is pulled into the website using SyncClient. Also, within Office, member statements are generated within the Office system, and results will then display on the Website for Unified Clients | Website, Office |
| MCO | Multi Club Organization ; a group of clubs managed by a Parent Company or other entity that is responsible for managing multiple clubs. | Club Industry |
| MRR | Monthly Recurring Revenue - amount paid by clients after the initial installation and stream of revenue. | All Products |
| Net Caddy | The original name of the Clubessential online reservations suite. We should no longer use this verbiage externally or internally. | Reservations |
| Netcaddy Pro | A locally installed application that used to serve primarily as a backup for the online reservations systems in case of internet outages. This is currently a client's next means of printing the online tee sheet or reservations sheet. Some clients still use the product to book reservations online although that is not recommended. We plan to phase out Netcaddy Pro in the future. | Reservations |

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| Office | This is the Club Management Application, is comprised of the Back-Office Accounting System (which includes Membership (Billing), Accounts Payable, Inventory Mgmt., Payroll, Guest Rooms, and Financial Reporting) and the Point of Sale Systems (Retail & F&B). | Office |
| OMP/OMS | CE Website Product for allowing Members to access their statements, and make payments online | Website |
| Operations | Consists of Design, FED, Content Loading, Project Mgmt., Quality & Assurance, Implementation, and Education Teams | Clubessential Internal |
| Orphan/Standalone Projects | Projects sold outside of a new sale package or redesign package. Typically takes place once the initial project is complete and is managed by the Orphan Project Manager. | Clubessential Internal |
| Pace of Play | The amount of time it takes to play a round of golf. To track pace of play via our online tee times system, staff are able to track when a group tees off, when they make the turn (on to the back 9) and when they finish. | Club Industry |
| Pickleball | a game resembling tennis in which players use paddles to hit a perforated plastic ball over a net. https://www.youtube.com/watch?v=8V9X9B2cL_Q | Reservations, Club Knowledge |
| POS | Abbreviation for Point of Sale, system (within Office) used by Clubs to conduct their Food and Beverage (F&B) and Retail (Golf Shop, Tennis Shop, etc.) transactions. | Office (or competing Accounting software such as Jonas) |
| Professional Services | Clubessential's online professional services reservation product. It allows for a club to show their professional services availability online and for members to book a personal training service. | Reservations |
| Project Management | Team within Clubessential that oversees and manages any sale that comes through till go live date. | Clubessential Internal |
| RDP | Remote desktop protocol. Used mostly in support to remote into another server or computer. Used during Gopher and RosterSync installs. Also used to connect to the Office system. Used by clients currently being hosted by Clubessential on our data servers to connect to their specific instance | Clubessential Internal; Office; Website |
| Reciprocal Club | What other clubs that have members allowed to come to my club or that my members can go and visit and charge back to their home club. | Club Industry |
| RosterSync (RS) | RosterSync refers to both the product/asset a client purchases to enable member roster data to sync from their 3rd party accounting system and the process of the sync. It may involve only our Syncclient software or a combination of Syncclient and RS Utility depending on what 3rd party vendor the client is using for accounting purposes. | Website |

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| RosterSync Utility (RS Utility) | CE's proprietary software that extracts member/roster information from 3rd party accounting systems. Once it extracts the data, it packages it into a CSV file containing the member data. Note: not all RS setups require RS Utility | Website |
| Sales | Refers to Team responsible for selling our Products - External Sales applies to First Time Clients, and Internal Sales refers to our Internal Sales Team (Associate Account Managers and Account Managers) responsible for making additional sales to existing clients. | Clubessential Internal |
| SCRUM | Type of process in order to complete projects which has been adopted by the Development Team to complete product enhancements. Learn more about SCRUM here: https://www.scrumalliance.org/why-scrum . Also see Dev Updates above for link to Webinar on SCRUM | Clubessential Internal |
| Shotgun | A Shotgun start is a golf tournament format in which all groups of players tee off simultaneously from different holes. This is a special event that is created within the Tee Times Reservation System. | Reservations - Tee Times |
| Sitebuilder | Sitebuilder is the internal CE tool allowing corp admins to modify pages and navigations, add pages, modify page and module security, alias pages etc. | Website |
| Spa | Clubessential's online spa reservation product. It allows for a club to show their spa availability online and for members to book a spa service. | Reservations |
| SQL | Structured Query Language | IT - General |
| SSL Certificate | SSL Certificate - Stands for Secure Socket Layer, it encrypts traffic between an end user and a site. | Website |
| Stencils | Two types; (1) Static, (2) Visual Basic script functions; the rules for how data from the Website translates to a third party's accounting system. Rules for which fields sync over from the 3rd party software. | Website |
| SyncClient | CE's proprietary file transfer software that encrypts roster CSV files and statement XML files and FTPs them to our servers. | Website |
| Tee Times | Tee Times: Clubessential's online tee time product. It allows for a club to show their tee time availability online and for members to book a starting time for their golf round. | Reservations |

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| Ticket | A ticket is what is generated in the POS system to generate a transaction. For instance, a member brings a Guest to play a round of Golf. The Retail Shop will start a ticket, add the necessary Items to the ticket (green fees, and cart rental for instance), and then close the ticket by settling it to a Payment Type (Cash, Credit, Member Charge, etc.). A similar process also occurs in the F&B area when Members/Guests dine at the Club. At the end of the day, all tickets are batched (automatically by the system depending on Area) and are then posted to the general ledger (typically by an Accountant/Controller). | Office |
| Vimeo | Video hosting platform. Clubessential utilizes Vimeo for non-branded hosted services to host client videos at an additional fee. | Website; Clubessential Internal |
| VPN | Private network across a public network and enables users to send and receive data across shared or public networks as if their computing devices were directly connected to the private network. | Clubessential Internal |
| Webinar | A seminar conducted over the Internet. Clubessential hosts webinars throughout the year as an ongoing effort to educate clients. | Clubessential Internal |
| XML | eXtensible Markup Language | IT - General |

