

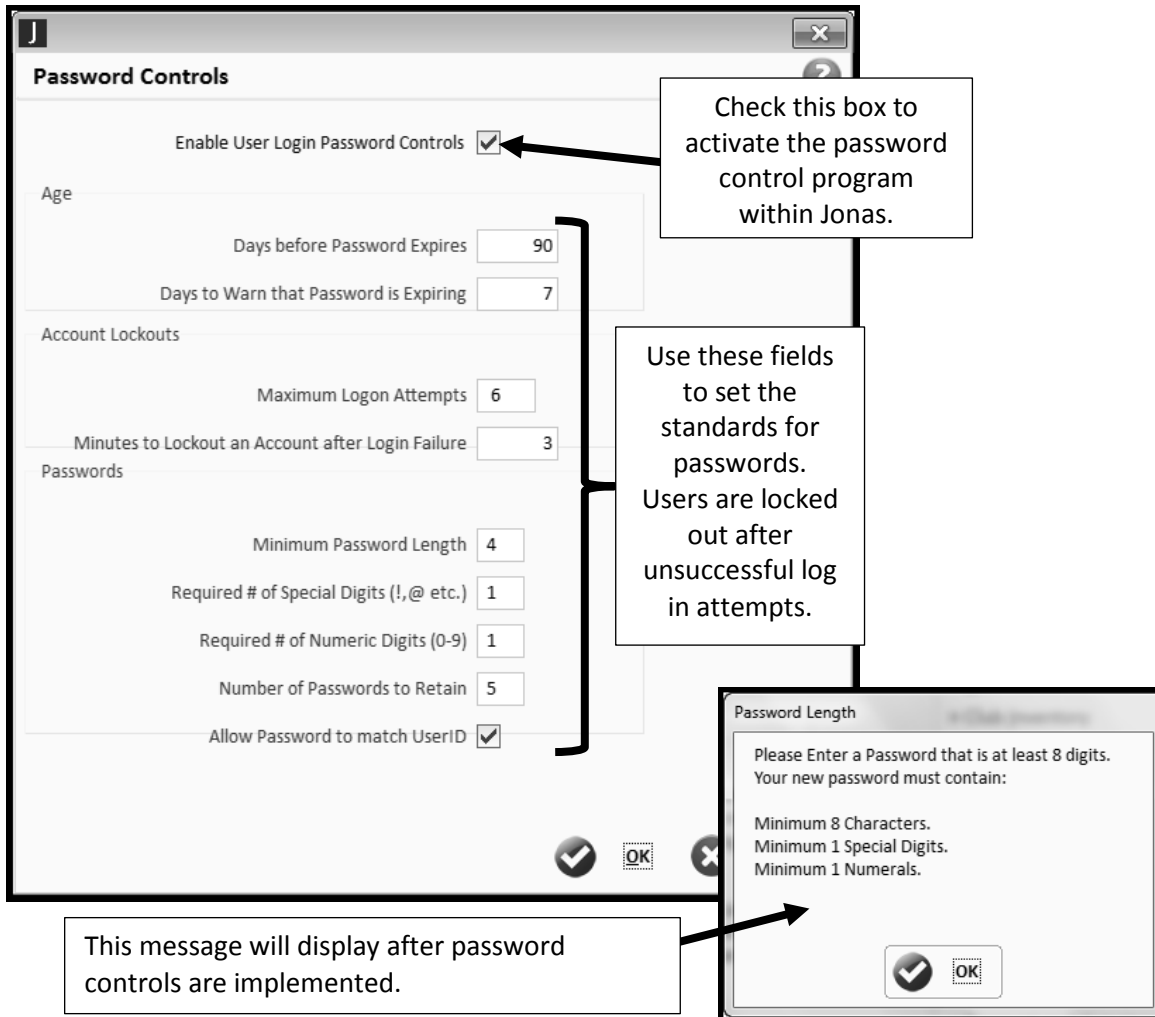
August 2015 Monthly Breeze Topics

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Jonas Passwords Controls & Overrides

Many clubs are concerned with access to their Jonas system where sensitive membership and accounting information is stored. Most clubs have very limited (or non-existent) password requirements for Jonas. You can implement password requirements to ensure users are selecting strong passwords that are changed on a regular basis.

System Administration -> System Setup -> System Parameters -> Password Controls



Check this box to activate the password control program within Jonas.

Use these fields to set the standards for passwords. Users are locked out after unsuccessful log in attempts.

This message will display after password controls are implemented.

Note: Certain employees (or groups of employees) can be exempt from these password controls from the User Option set up of the ID (or Group ID). This allows for POS Servers to be excluded from this program but all managers (and above) will follow the password controls.

Bypass Password Controls

A/P: Sort Suppliers by Name or Code

Accounts Payable data entry is all about speed. You need to get the invoices into Jonas as quickly and as efficiently as possible. Jonas has two sort options that control how your vendors are displayed during data entry.

System Administration → System Set up → System Parameters → Options → User Options

This field controls how the vendors are sorted during AP processing:

- Enter **C** for the vendors to be sorted by vendor code
- Enter **M** for the vendors to be sorted by vendor name (Yes, enter M!)

Supplier F2: by Code or naMe ? **M**

Many clubs that use numeric vendor codes do not like to sort by vendor code because the vendors are not in alphabetical order:

J Suppliers (Active) (Press Gear or F10 - by Name) ←

Supplier Code	Supplier Name	Address 1
** Add a new Supplier **		
101	Zebra Technologies	1 Barcode Way
102	Apple Bath Supplies	Wet Floor Way
203	Cater Events International	
703	Dairy Supply of NY	Milkman Way
ALAN	Alan's Golf Supply	101 Golf Cart Lane
AMEX2	American Express	PO BOX 10015
AMEX3	Amex Credit Card Account	PO BOX 98766
BASIC	Basic Leasing	2564 Baymeadows Circle West

Tip:
Regardless of your system setting, you can press F10 (or the gear button) at any time to change your current view.

F10



If this is the case at your club, sort your vendors based on **NAME** and then the vendor code becomes much less important:

J Suppliers (by Name) (Active) (Press Gear or F10 - by Number) ←

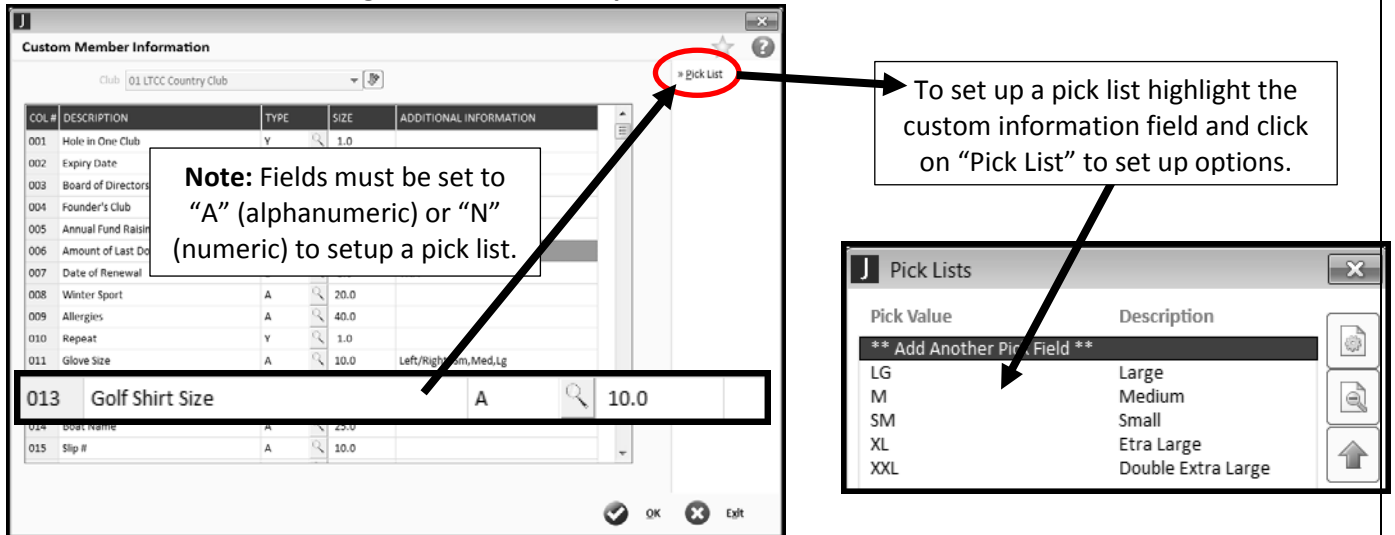
Supplier Name	Supplier Code	Address 1
** Add a new Supplier **		
Acushnet Company	NEWS	893 Box Lane HWY
Alan's Golf Supply	ALAN	101 Golf Cart Lane
American Express	AMEX2	PO BOX 10015
Amex Credit Card Account	AMEX3	PO BOX 98766
Apple Bath Supplies	102	Wet Floor Way
BBQ Masters, Inc.	BBQMST	111 Char Grilled Ave

Please note, this system option governs ALL companies so keep this in mind if you have AP in multiple companies in Jonas.

Membership: Custom member information pick lists

The custom member information fields allow you to track up to 300 pieces of information for every member. Do you ever find incorrect, or inconsistent, information entered into a custom information field? You can standardize information entered into custom information fields by setting up pick lists:

Club Management → Club Setup → Custom Member Information



Note: Fields must be set to "A" (alphanumeric) or "N" (numeric) to setup a pick list.

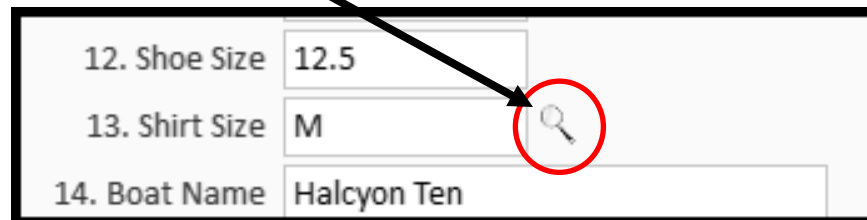
To set up a pick list highlight the custom information field and click on "Pick List" to set up options.

Pick Value	Description
** Add Another Pick List Field **	
LG	Large
M	Medium
SM	Small
XL	Etra Large
XXL	Double Extra Large

Once established, this information will be available as an option on each member file:

Club Management → Member File → Setup/Edit Member → Custom Information

The presence of the magnifying glass next to the custom member information field indicates the presence of your pick list. Click on the magnifying glass, or press F2, to select the proper information.

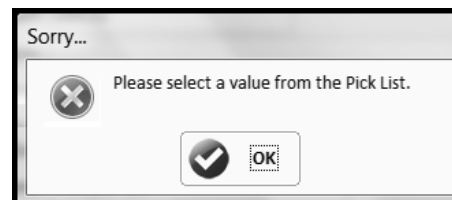


12. Shoe Size 12.5

13. Shirt Size M

14. Boat Name Halcyon Ten

Only valid entries from the pick list will be accepted:



Configurable member statement feature of the month

We get a lot of questions each month about options available for the configurable member statements. We use this space to review some popular features that will help your club.

The Jonas configurable member statements can be programmed to print the amount due (or paid) directly on the statement payment stub. This will help make the statement clear to the Member it will also make it easy for the accounting staff when the check comes in.

Print Amount PAID on Statement

Many clubs have this default verbiage on their configurable member statement which is a bit presumptuous by assuming the member is going to pay their balance in full:

	Last Tree Standing Club 106 Putting Green Way Edison, MO Office: (555) 555-5555 Pro Shop: (555) 555-5544 www.ltsc.org	INVOICE
Mr Danny S. Albertson III 824 Trek Way Apt 3B Bayside, WI 88012		0077 MEMBER
		07/31/15 DATE
		AMOUNT PAID \$ 6,014.07

The next page contains options that can be set here:

Club Management -> Club Admin -> Select Club Forms Design -> Configure

Print Amount DUE on Statement

You can clarify the statement with the three option settings below. This changes the verbiage from Amount PAID to Amount DUE letting the member know how much to pay:


1. Print Amount Due on Stub (Checked)
2. Print Additional Amount Due On The Stub (Unchecked)
3. Replace 'PAID' in 'AMOUNT PAID' with? (Verbiage Change)

	Last Tree Standing Club 106 Putting Green Way Edison, MO Office: (555) 555-5555 Pro Shop: (555) 555-5544 www.ltscc.org	INVOICE
		0077 MEMBER
Mr Danny S. Albertson III 824 Trek Way Apt 3B Bayside, WI 88012		07/31/15 DATE
		AMOUNT DUE \$ 6,014.07

Print Amount DUE on Statement (let the member write in the amount PAID)

If you want a combination of both, use these two settings. This will print the amount DUE and allow the member to write in the amount they are paying:

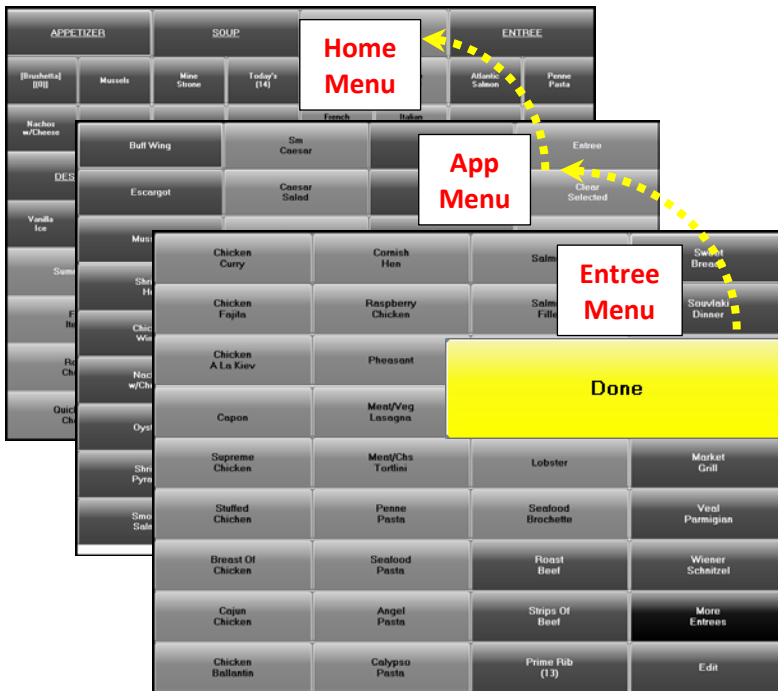
1. Print Amount Due on Stub (Unchecked)
2. Print Additional Amount Due On The Stub (Checked)
3. Replace 'PAID' in 'AMOUNT PAID' with? (No Verbiage Change)

	Last Tree Standing Club 106 Putting Green Way Edison, MO Office: (555) 555-5555 Pro Shop: (555) 555-5544 www.ltscc.org	INVOICE
		0077 MEMBER
Mr Danny S. Albertson III 824 Trek Way Apt 3B Bayside, WI 88012		07/31/15 DATE
		TOTAL AMOUNT DUE \$ 6,014.07 AMOUNT PAID \$ _____

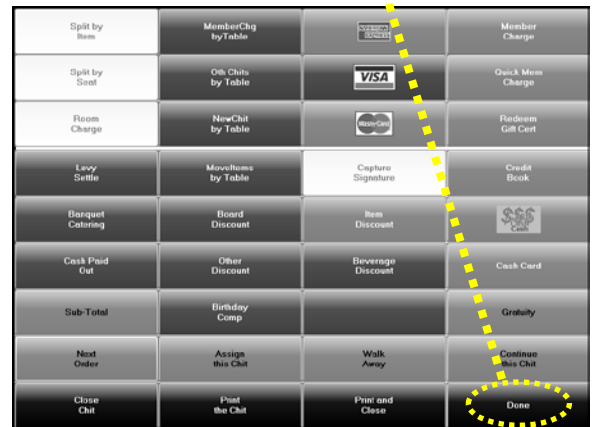
Point of Sale: Why does the DONE button kick me out?

Is your staff constantly getting kicked out of Jonas Point of Sale for seemingly no reason? Chances are they are using the **DONE** button without fully realizing what the button does.

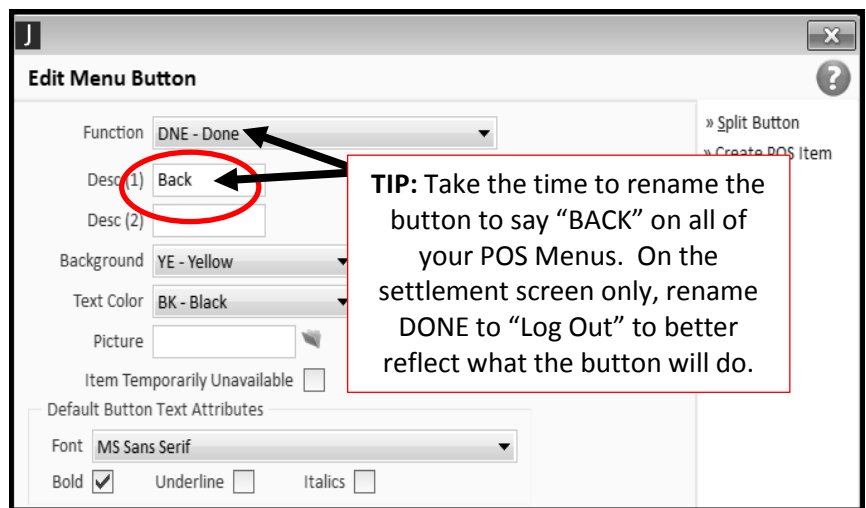
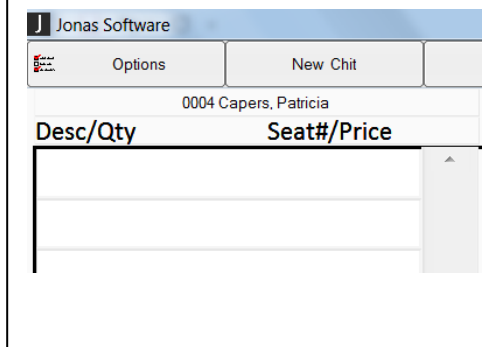
The DONE button takes you **back** one menu at a time.



From the Settlement Screen the DONE button will log you out of Jonas. (Because there are no more menus to back up to)



Additionally, if you start a new chit and press **DONE** before adding any sales items Jonas will simply kick you out and not save your chit:



Banquet & Catering: User Security

Did you know that there are user restrictions that can be set up for each employee that uses the Jonas Banquet & Catering module? You can set these up for each employee (or group) to ensure that your staff is only allowed to process (or change) certain items within this module:

Administration -> User Administration -> Banquet and Catering



Banquet & Catering User Functions for Front Desk Reception

Settlement/Billings:

- Cannot process a Deposit
- Cannot process a Payment
- Cannot print an Invoice
- Cannot print a Preview
- Cannot Post a booking
- Can edit G/L accounts
- Auto Notify Tickler
- Cannot Process Adjustments
- Cannot Process Split by Member Charge

Use **Settlement/Billing** options to control who can processing charges for a function.

Processing:

- Use Operations Screen
- Allow Company Selection
- Can Create Bookings in Advance (days) 30 days
- Cannot Delete a Booking
- Cannot Delete a Room Line
- Cannot Delete a Service
- Cannot Delete a Service Line
- Cannot Delete a Resource
- Cannot Delete a Resource Line
- Cannot Access Services
- Cannot Access Resources
- Supervisor Override

Use **Processing** options to control actions within the booking screens.

OK Undo Delete Exit