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GREENS FEE MAINTENANCE  
Tee Sheet Version 7.7.2 +

Aug 10, 2015

# Overview

This document highlights the Fee Maintenance module that was introduced in Version 7.7 of the EZLinks Tee Sheet software. For assistance, contact EZLinks at 888.99.LINKS (888-995-4657).

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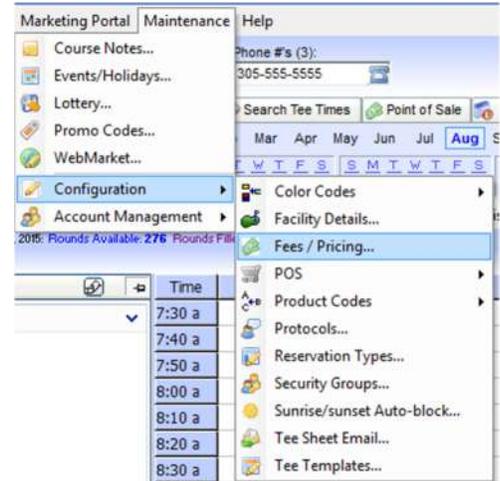
## Fee Maintenance Menu

Greens fees are managed within the Fee Maintenance section of your EZLinks Tee Sheet software.

Access it from the main menu, under *Maintenance > Configuration > Fees / Pricing*.

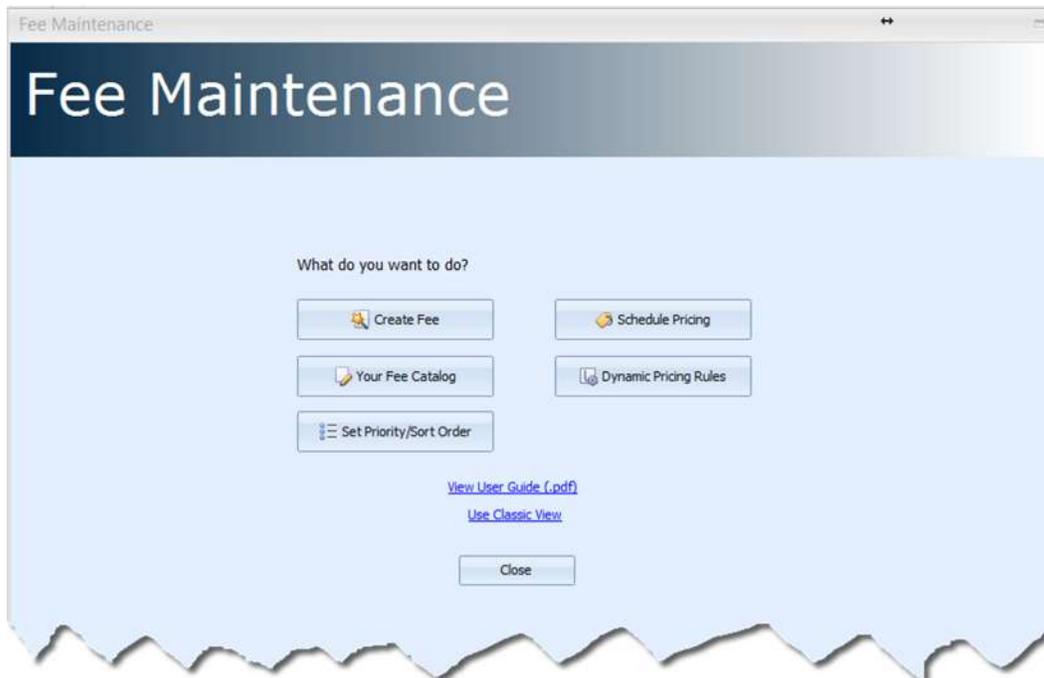
Within Fee Maintenance, you can:

- Create a new fee type
- View all existing fee types
- Set priority/sort orders for those fee types
- Apply pricing schedules
- Jump to the Dynamic Pricing area of the software



Other options include:

- Opening a copy of this user guide
- Launching the older “Classic View” interface that was used for managing greens fees prior to Tee Sheet Version 7.7. [This is not available to users joining EZLinks after October 2015].



Each of these options is discussed in the chapters that follow.

# Your Fee Catalog

Within the Fee Catalog you can view all greens fee types that have been built for your course(s), edit them on-the-fly, and launch a wizard that will help you build a new fee type.

## The Fee Catalog Grid

Fees for the selected Facility/Course(s) will load into an interactive grid.

The screenshot shows the 'Fee Type Catalog' interface. At the top, it says 'These are your available fee types. Add or edit as needed.' Below this are 'Displaying Fee Types For' dropdowns and 'Optional Filters' including 'Linked to Booking Group(s)', 'Linked to Reservation Type(s)', and 'Active and Inactive Fees'. The main part is a grid with columns: Fee Name, Abbrev, SKU, Holes, Cxl Hrs, Walkups, Cart, Caddie, Member, Resident, Sr, Jr, Comp, and Active. Callouts explain: 'Use filters to reduce the grid results and locate specific fee types.' (pointing to filters), 'Click a column header to apply sorting.' (pointing to 'Holes'), 'Click the right edge of a column header to display filter options.' (pointing to the right edge of 'Holes'), and 'Active Fees = black font, Inactive Fees = red font, Protected Fees = grey font' (pointing to the 'Ladies Day Rate' row).

Fee Name	Abbrev	SKU	Holes	Cxl Hrs	Walkups	Cart	Caddie	Member	Resident	Sr	Jr	Comp	Active
4th of July Special	JULY4	900001	18	24									Active
BB WD 18 Afternoon Walk	BBWD18	000008	18	24									Active
Complimentary/PGA	COMP	800001	18	24									Active
EZLinks Prepaid Rate	PPAID	EZ LINKS	18	24									Active
GIS Special	SHoWSpC	70362	18	24									Active
Golf+Lunch Special	GFLunch	900002	18	24									Active
GolfNow Rate	GNOW	700007	18	24									Active
Hawaiian Happytime Rate	HHR	900004	9										Active
Hotel / Wholesale	hot	HOTWS	18										Active
Hotel/Wholesale Rate	HOT	HOTWS	18										Active
Junior Weekday 9	JRWD9	200009	9										Active
Ladies Day Rate	LDAY	300001	18										Active
Member (Silver)	M-Silver	500009	18										Active
Member 18-Holes	M-18	500000	18										Active
Member 9-Holes	M-9	500006	9										Active
Member Guest Fee	M-Gst	500002	18										Active
Non-F			18										Active
Non-F			18	24									Active
Non-F			18	24									Active
Outin			18	24									Active

## Grid icons:

- Save: Indicates that changes were made to that row. Click to save.
- Undo: Click to undo changes that were made to the fee.
- Protected: Only EZLinks can edit the fee.

## Editing a Fee Type

There are two ways to edit a fee type.

- Adjust it directly in the grid:
  - Type or click in the grid to make your changes.
  - When finished, click the  icon or the **Save All Records** button below the grid.
- Highlight a fee in the grid, click the **Edit Selected Fee Type** button to launch a wizard, and make changes as needed.

*[For cloud-based Point-Of-Sale users, “Fee Name” and “SKU” may not be editable from within the Tee Sheet application. Contact your POS administrator if assistance is needed].*

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### Active vs. Inactive Fees

Fee Types cannot be deleted, as a safety measure to ensure that historical reservation data is never lost. If a fee type is no longer wanted, deactivate it by unchecking its “Active” status in the grid.

- An Inactive fee will not be offered to any booking channels.
- An Inactive fee will be displayed in the grid with a red font, for easy identification.

 *In previous versions of the EZLinks software a fee type could be active for some courses, but inactive for others. If a fee type has this characteristic, instead of the Active box being checked or unchecked, a blue square will be shown. Changing its status (i.e. to “Inactive”) will then apply that change to all courses that fee is linked to.*

*Also, in previous versions users would sometimes turn a fee “off” by disconnecting it from all assigned booking channels. This can lead to the fee being omitted from the current Fee Catalog screen. (See “Troubleshooting” for more details).*

## Create a New Fee Type

To simplify the building of new fees, a wizard-style workflow is provided. It can be launched by clicking the **Add New Fee Type** button, located:



- At the Fee Maintenance main menu, or
- At the bottom of the Fee Catalog screen.

Click the button, and proceed through the following screens.

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### Define the Fee

When building a new fee, give it a *Name* and *Abbreviation*. Other available fields include:

- *Web Description*: An optional text explanation of what the fee includes. If used, it will display the information to golfers who reserve online using an EZLinks booking engine.
- *Complimentary Rate*: This indicator is used to monitor comp rounds through EZLinks reporting.
- *Cancel Period*: The number of hours before the tee time that a reservation should be cancelled. This is displayed to golfers who book online, as well as non-administrative Tee Sheet users, and dictates when they are no longer allowed to cancel a reservation.

Click **Next** to continue.

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### Fee Details / Icons

Define the characteristics of the fee type.

- When a tee time is displayed to golfers on the Web, this indicates the icons that will be shown.
- 18/9 Holes is used by EZLinks Turn-Time Automation. (Example: If a tee time slot only permits 9-Hole play, then only those fee types identified as such will be available during booking).

Click **Next** to continue.

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### Courses

A list of courses that your user account has access to is displayed. For users who manage multiple golf facilities in different cities, a regional filter option will appear.

Select the courses that the fee type applies to, and click **Next** to continue.

## Fee Assignment

This screen is where you define “what booking channels have access to this fee type”. A list of the courses’ Reservation Types is displayed, along with each affiliated booking group/channel.

Check the boxes for whichever Reservation Types and Booking Groups you want to apply the fee to.

- By default, it will be linked to each underlying Course that the Reservation Type + Booking Group is affiliated with. If you ever need to disassociate it from a specific Course, simply expand  the grouping layer to view the Courses, and uncheck boxes as needed.
- Optional filters allow you to streamline the list of Reservation Types and/or Booking Groups.
- You must link the fee type to at least one Reservation Type to proceed past this screen.

Click **Next** to continue.

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## Check-In Options

Assign settings on this screen as needed.

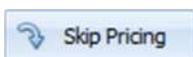
- *Point-of-Sale SKU/UPC Code*: If your EZLinks Tee Sheet has an integrated POS system, the SKU will be transmitted to it when a golfer is checked-in.
  - If your golf shop uses EZLinks Revolution® Cloud POS, a selection list of available SKUs may be shown, rather than a free-form text box. Functionality may vary based on your system configuration.
- *Walkup Players*: Golfers who walk in to the golf shop without a reservation can be booked and checked-in simultaneously by the clerk by highlighting the Tee Sheet grid and clicking the **Check-In** button. A list of fee types that have this “Walkup” setting enabled is then available to the clerk, so they can assign the appropriate option to the customer.
- *Affiliated Memberships*: A list of membership types that have been programmed into your EZLinks Tee Sheet is displayed. If the fee type is specific to any of them, select the checkbox.

Click **Next** to continue.

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## Price It

You have the option to schedule pricing now, or **Skip Pricing** and configure it later.



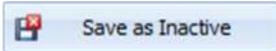
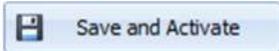
If you choose **Skip Pricing**, the fee will be saved in your Fee Catalog as “Inactive”. When you are ready to apply pricing, you will first need to change it to “Active”.

To apply pricing now:

1. Type-in the price, and set a schedule for when it is in effect. Optional settings include:
  - *No-Show/Cancel Amount*: This value will be fed into the Cancellation Screen of the Tee Sheet software. If integrated credit card processing is used, the amount can then be automatically charged to the golfer's credit card, if desired.
  - *Price Always Available*: This will create an open-ended schedule, making the fee/price available every day, at every time. This should only be used for Fee Types where the price never changes.
  - *Effective Dates*: This option accommodates facilities with multiple golf courses, where Member vs Public play alternates between courses based on odd/even calendar dates.
  - *Advanced Options*: EZLinks provides the ability to limit the number of rounds that can be reserved under a certain fee type for a given day.
    - Example: If a value of 8 is entered, then up to 8 golfers (rounds) can be booked to a day's tee sheet between the schedule's Start and End Times.
    - This restriction is only applied to reservations booked using the Tee Sheet application. It is not enforced for Web-based reservations.
  
2. Click **Next** to continue.

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## Manage Pricing

3. The final screen is "Manage Pricing". Review and fine-tune your settings before saving them.
  - This screen was designed for corporate or regional managers who need to apply a fee to multiple courses simultaneously, but need the ability to apply some variation.
  
4. Once you have confirmed your pricing schedule...
  - Click **Save and Activate** to finish. Or,  
  - Click **Save as Inactive** if you want to store the settings, but don't want them to immediately be in effect. (This is for instances where a manager is awaiting pricing approval from a board or municipality).

# Pricing

A list of all Fee Types are displayed in the grid. Below each you will find its scheduled pricing. Use the various grid controls to locate, edit, and add new pricing. A selected row will be highlighted in yellow.

## Grid Icons:

-  Save Indicates that changes were made to the row. Click to save.
-  Undo Click to undo changes that were made to the fee.
-  Protected Only EZLinks can edit the fee.
-  Not Expired The pricing schedule is in effect now or in the future.
-  Expired The pricing schedule has expired.
-  Expires Soon The pricing schedule expires in 30 days or less.
-  Not Scheduled There are no pricing schedules in the system for the fee type.

**Column Sorting:** Clicking a column header will sort the rows under each Fee Type. It does not sort the entire grid. The Fee Types themselves will remain statically positioned. If you are trying to locate specific data, consider using one of the many filter options.

## Schedule New Pricing for a Fee Type

1. Highlight a fee name in the grid, and click the **Schedule New Pricing** button. This launches the window for scheduling a price (“Price It”).



2. Type-in the price, and set a schedule for when it is in effect. Optional settings include:
  - *No-Show/Cancel Amount*: This value will be fed into the Cancellation Screen of the Tee Sheet software. If integrated credit card processing is used, the amount can then be automatically charged to the golfer’s credit card, if desired.
  - *Price Always Available*: This will create an open-ended schedule, making the fee/price available every day, at every time. This should only be used for Fee Types where the price never changes.
  - *Effective Dates*: This option accommodates facilities with multiple golf courses, where Member vs Public play alternates between courses based on odd/even calendar dates.
  - *Advanced Options*: EZLinks provides the ability to limit the number of rounds that can be reserved under a certain fee type for a given day.
    - Example: If a value of 8 is entered, it means up to 8 golfers (rounds) can be booked using that fee type per day during the schedule Start and End Times.
    - This restriction is only enforced for reservations booked within the Tee Sheet application. It is not enforced for Web-based reservations.
3. Click **Finish**.
4. You will be returned to the Schedule Pricing grid. Verify your work, and make adjustments in the grid if needed.

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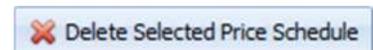
## Editing a Fee Pricing Schedule

To change a pricing schedule you can adjust it directly in the grid. When finished, click the  icon or the **Save All Records** button below the grid.

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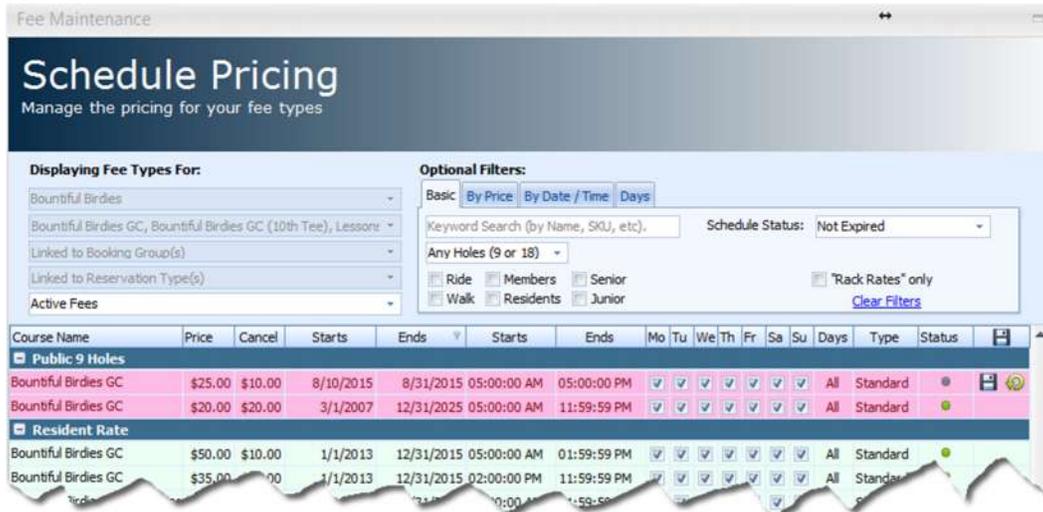
## Deleting a Fee Pricing Schedule

To delete a pricing schedule you can do it directly in the grid. Highlight the row to delete, and click the **Delete Selected Price Schedule** button.



## Schedule Types

By default, each pricing schedule is set to “Standard”. However, if a new schedule overlaps an existing schedule, the conflicting rows will be displayed with a red background.



Before the software will allow you to save your work you must either:

- Make a schedule correction to fix the overlap, or
- Set one of the conflicting schedule types to “Replace Standard”.

If a “Replace Standard” setting is already in use, applying the setting for “Override All” will give a pricing schedule priority over any and all overlapping schedules.

## Set Fee Priority and Display Orders

When a reservation is being booked by a clerk, call center agent, or online by a golfer, a tee time slot (i.e. 8:00am) may have multiple green fee types available during that time. But which fee type should the EZLinks system default to?

This screen allows you to set the prioritization using a drag-and-drop interface.

- Use your mouse to drag a fee up or down the list.
- Fee types at the top of the list will take precedence over those below it, whenever multiple fees are in effect at the same time during a reservation.

Two sorting controls are available:

- **Prioritization Order:** This is referenced by the EZLinks booking logic, to determine which Fee Type takes precedence as the default if multiple are available during a reservation.
- **Display Order:** This is referenced by the EZLinks software when displaying fee types in an onscreen listing. Most lists are sorted alphabetically. But some, such as the “Show Fees” list that is available during Tee Sheet bookings, can display fees in your custom order.

Fee Maintenance

### Set Fee Orders

Use this interactive tool to define how fee types are prioritized (for booking) and sorted (for displaying to staff).

Show Fee Types For: Bountiful Birdies

Highlight the Fees used by Reservation Type: Daily Fee

Drag-and-drop fee names to change which are used/displayed first, when available.

Prioritization Order | Display Order

Fee Name

- Non-Resident 18 (Weekday)
- Non-Resident 18 (Weekend)
- Hotel/Wholesale Rate
- Outing
- Value Package
- Resident Rate
- Member 9-Holes
- Public 9 Holes
- Hawaiian Happytime Rate
- Utilization
- 4th of July Special
- Member (Silver)
- Golf+Lunch Special
- Player Card
- Member Guest Fee

Use your mouse to drag fees up and down in the lists, to set the booking priority and onscreen display orders you prefer.

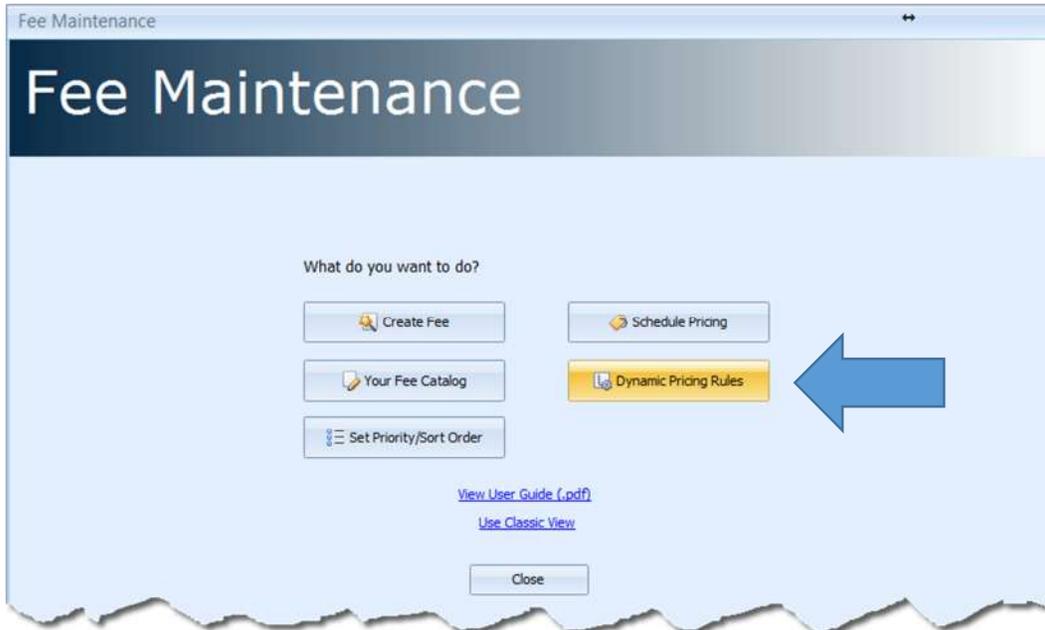
For visual assistance or troubleshooting, use the optional Reservation Type filter to highlight those Fees that are linked to it.

**NOTE:** Newly created fees will be placed at the bottom of the list, to prevent them from accidentally being prioritized over more-commonly used fees. -- [BUG: In Tee Sheet Version 7.7.2 new fees are wrongly being placed at the top of the lists. This will be resolved in Version 7.7.3+]

## Dynamic Pricing

The Dynamic Pricing button in the Fee Maintenance menu will re-direct you to *Maintenance > WebMarket > Dynamic Pricing*, where you can manage your automated price controls for Web-based reservations.

Contact EZLinks if you need assistance or have questions about Dynamic Pricing.



## Pricing Tips

- In the Schedule Pricing grid, set the filter to display Expired schedules. You can then locate pricing from a previous season (i.e. Summer 2014), and simply type updated Start/End Dates into the grid to re-activate that pricing.

## Troubleshooting

Issue: A fee type is linked to a course on the “Courses” screen of the wizard, but is not appearing when you filter by the Course Name in the Fee Catalog grid.

- Cause: The fee type has not been assigned to any Reservation Types and/or Booking Groups affiliated with a course. When this occurs it will be set to an “Inactive” state.
- Solution: Highlight the fee in the Fee Catalog grid. Click the button **Edit Selected Fee Type**, and proceed through the wizard. Verify the Courses that it is linked to. Then, at the Fee Assignment screen, verify that at least one reservation type is selected for each course the fee is used by.

Issue: A fee type is shown in the *Pricing* grid, but is not in the *Catalog* grid.

- Cause: In the older Fee Maintenance interface the fee may have been ‘disconnected’ from all Reservation Types and Booking Groups, leaving it orphaned. (This cannot occur in the newer interface).
- Solution: First, verify that there are not any filters that may be suppressing the display of the Fee Type in question. That is the most likely cause. If it is not, launch the older version of Fee Maintenance, locate the Fee Type in question, and make sure it is linked to at least one Booking Group and Reservation Type using the checkboxes at the lower-right corner of the screen. (Contact EZLinks if you do not have access to the previous maintenance interface and need assistance).