Newsletter for October 2007 from Club Data Corporation

This newsletter is sent to Club Office users to:

- Remind you that there is a new software update on the Clubdata.Com website.
- Provide helpful hints or information that you may find of value.
- Please note that there was no beginning of the month update, nor newsletter, for September, 2007.

Software Updates:

Club Office software is being updated continuously, either to add new features or report formats or to correct situations that has been identified. It is our intention that all users on support will take the time to update their software once a month, <u>normally after month end</u>, so that everyone is on the "latest and greatest" version of code and can take advantage of the latest features. In the download area on the Club Data web site, download the file that includes SQLPos (or does not include SQLPos) as appropriate for your club.

We are seeing that some clubs are often months behind in their software, indicating that there may be a problem knowing how to download. The instructions start on page 11 at the end of this newsletter.

Software Changes in Club Office for the September update:

There is a **rearrangement of the Member Financial Detail Screen** to more clearly present the members' current financial position.

	Options Save	Options Loo	kup Sub Ace	counts Other Cha	rges Current	Charges	Cancel	Exit
Balance Forward	1789.90	1-30 days	274.93	Food and Bev	11.60	Due	Prepaid Bal 1	.0
Current Charges	97.47	31-60 days	415.95	Pro Shop	.00	OK	Prepaid Bal 2	.(
Payments received	.00	61-90 days	277.38	Activities	.00	OK	Prepaid Bal 3	.(
Total due:	1887.37	91-120 days	366.75					
		over 120 days	454.89	Installment Bal 1	.00		YTD Total 1	607.2
				Installment Bal 2	.00		YTD Total 2	3384.3
Current Charges Payments received Total due: Credit Limit: Credit Limit: Credit Limit: Monthly minimum at Monthly minimum at Cycle 8 - 15th thru 11 Cycle 0 - 20th thru 21 Cycle 0 - 20th thru 11 Cycle 0 - 10th thru 11 Cycle 0 - 10	.00	Frequency	1	Installment Bal 3	.00		YTD Total 3	.(
C Cycle A - 1st th C Cycle B - 15th C Cycle C - 10th	nru last day of month thru 15th thru 10th thru 20th Mar, AprJun, Jul-Se nth (Feb-Apr, MayJ	ap, Oct-Dec) ul, Aug-Oct, Nov-Ja Aug, Sep-Nov, De	O User-defin an)	ycle (Jan-Feb, Mar-Ap ed		Pro Sh	ev (code1) MGO op (code2) 0 es (code3) 0	Г С Г С Г С
C Quarterly (Jan- C Quarter +1 mol C Quarter +2 mol C Trimester (Jan-	htns (Mar-May, Jun- Apr, May-Aug, Sep- (Jan-Jun, Jul-Dec)	Dec)						

A new purge in inventory eliminates old transaction history to speed up some inventory processing. Also inventory item numbers are now recorded in the "reason" field for G/L entries from inventory module.

e Reports Info Help							
	Single Add <u>M</u> ulti Items	<u>P</u> revious	<u>N</u> ext	<u>C</u> ancel	<u>S</u> ave	<u>D</u> elete	E <u>x</u> it
Adjust Inventory Quantities Adjust Inventory Quantities Update SQLPos Inventory Exit Description Order unit (pkg) Current/Previous/Avg cc	Cost Retail Price Alternate Retail (GL Acct - Sales GL Acct - Sales GL Acct - Cost of Goods GL Acct - Discounts Service Charge Percentage Sales Tax Percentage Sales Tax Percentage Show Kem in POS	UPC: 44*	0004	-	Oty @ Storeroom A Oty @ Storeroom B Oty @ Mens Locker Oty @ Womens Locker		
Total value on hand Vendor # Vendor's SKU	Renumber Inventory Reset Items to A/R Settings Purge Inventory XACT	00 00 Avg cost x qty on ha			Oty @ Primary Sales Total Oty on hand Optimum gty on hand	0	
Retail price G/L Acct Sales Service charge % (Ex. 1	6.9500 3042.000	Alternate retail price.	3.4750		Minimum qty on hand Over/(understock) Reorder quantity	0 0 15 0	
Sales tax % (Ex: .065 = 6 G/L Acct - Inventory G/L Acct Cost of Goods	Cost Retail Price Alternate Retail Alternate Retail GL Act - Sales GL Act - Sales GL Act - Inventory GL Act - Cost of Goods GL Act - Discounts Service Charge Percentage Sales Tax, Percentage Sales Tax, Percentage Charge Dept Code Renumber Inventory Reset Items to A/R Settings Alter Purge Inventory WACT ✓ Sales Tax, Data Job Settings Alter Job Settings Alter Job Settings				Suggested order	0	
G/L Acct Sales Discount Show in SQLPos (0=no, 1	s				Refresh Inventor	y Quantities	

New Backup Routine: In response to user requests, you now <u>have</u> <u>the ability</u> to include the Date / Time in the backup file name so that you can easily know exactly which files you have when determining the files to restore. It also allows you to easily keep many generations of backup without overlaying any existing backup files. From the pyramid, go to Utilities / Backup/Restore.





CAUTION: Whenever you do a backup or a restore, insure that the computer date is correct. People that sometimes change the computer date could get in serious trouble if the dates on the file are incorrect.

Suggested check numbers: In both A/P and in Payroll, the system will now suggest the next check number to be used when going into a check processing mode.

eduction by	pass is ON	Clear Workspace	Reconcile Payroll Che	ecks Reissu
		Employees		
Employee #	Last name	First name	Status	
1	Anderson	Tommy	1-Working	
2	Kendrick	Kyle	1-Working	
3	Rogers	Donald	1-Working	
	Date 20071001	Type the starting of	imber used was 102 sheck number in the box below. cancel the trial process now. sontinue.	OK Cancel
		103 1.00 Holiday hrs	s/c	
P		5.00 Holiday O/T	Otherp	1

Employee YTD Payroll Information:

A field called "Fixed Deductions" has been on the Employee Earnings Detail screen but was applicable only as in input field for clubs converting from our old system – and that activity is long past. The new field "Variable Deductions" is now active. To see the fixed deductions, you can go to the Deductions tab for both Quarterly and YTD information.

Company Wages .00 25.00 Variable Deductions .00 .00 Total Pre-Tax .00 .00 Gratuities .00 .00 FICA Wages .00 25.00 Net Pay .00 .22.30 FICA Taxes .00 1.55 Medicare Wages .00 25.00				E <u>x</u> it		
						C Mrs
	Quarter to Date	Year to Date		Quarter to Date	Year to Date	
Company Wages	.00	25.00	Variable Deductions	.00	.00	
Total Pre-Tax	.00	.00	Gratuities 📡	.00	.00	
FICA Wages	.00	25.00		.00	22.32	
FICA Taxes	.00	1.55				
Medicare Wages	.00	25.00		Quarter to Date	Year to Date	
Medicare Taxes	.00	1.13	Regular hours paid	.0000	1.0000	
FIT Wages	.00	25.00	Overtime hours paid	.0000	.0000	
FIT Taxes	.00	.00	Vacation Hours paid	.0000	.0000	
State Taxes	.00	.00	Holiday Hours paid	.0000	.0000	
Local Taxes	.00	.00	Sick Hours paid	.0000	.0000	
Earned Income Credit	.00	.00				
Declared Tips	.00	.00	Unused Vacation Hours	Modify		
Meals	.00	.00	Unused Sick Hours	Modify		
Emp Purch/Garnish	.00	.00				
Deferred Comp 401K	.00	.00	O Quarter 1 O Quarte	r 2 O Quarter	3 🛈 Quarter 4	

Revisions to AR Report 12, Member Aging Report: You now have the option to include the Last Payment Date on the Member Aging Report. <u>A word of information, however.</u> To include the last payment date on the report requires the system to look at an additional database so it takes much longer to run than the "normal" report 12.

DMIN @ Report Generator Info Help		
Membership	Accounts Receivable	Configuration
counts Receivable		
Step 1: select report type		
0-Active chit list 1-Problem chit list 2-Payments this period 3-Payments select range 4-Member activity this per 5-Member activity prior per 6-Member activity prior per 8-Sales by minimim # - de 9-Sales by minimum # - su 10-Member Aging report - 11-Member Aging report -	iod (detailed) priods (detailed) iod (summary) priods (summary) tailed ummary Last month only Last month to today	
	riptions cending order by Total \$ RICAL-MASTER ACCTS ONLY MASTER ACCTS ONLY by date range by member #	Include Payment Date? Include last payment date in repor (This could take time to compile) Yes No

e ABC Clui	er Aging Rep		pugh September 2	Numerical 007	Order	Report date	: 20071016	Pa	ge 1
Acct #	Name	- Last Pmt Date	Payments	1-30	31-60	61-90	91-120	121+	Total Due
100.00	Monday Men's League,			-14,961.66	unaserasera				-14,961.6
109.00	Carlson, Bob	20070930		152.21					152.2
155.00	Davis, Lee	20070930		37.28					37.2
207.00	Anderson, Bob	20070930		82.51					82.5
240.00	Fish, Charlie	20070920		575.97	274.93	56.97			907.8
249.00	Carlson, Mark	20071015	-2,400.00	152.21	189.83	152.21	237.24	2,118.37	449.8
259.00	Emerson, Jim	20070930			87.68	60.00	85.50	84.24	317.4
274.00	Barnett, Charles	20071015	-151.21	151.21					
312.00	Anderson, Gary	20070427		141.50	164.65	141.50	209.38	1,192.14	1,849.1
355.00	Duck, Don M	20070930		10.16	104.15	105.68	153.52	1,017.65	1,391.1
356.00	Ripley, Gordon	20070930		9.58	98.14	9.58	96.55	95.12	308.9
429.00	Gack, Bob	20071015	-152.21	152.21					
443.00	Sands, Lee	20070930	an in a sainte shakeen aa	152.21	192.78	152.21	240.15	236.60	973.9
512.00	Hallberg, Bill	20071015	-1,927.98	286.51	1,641.47				-0.0
1014.00	Malloy, Ken			42.60	78.78	62.60	125.95	890.14	1,200.0
1034.00	Fenton, Steve	20070930		169.06					169.0
1400.00	Johnson, Dave			20.23	31.41	20.23	30.65	694.45	796.9
5172.00	Dobbs, Jimmy	20071015	-94.78	94.78					

Initiation of Reports: The Pyramid's Report Generator.

We have included the Membership, Accounts Receivable, and System Reports that can be printed from the pyramid <u>or</u> the various modules <u>also.</u> Therefore, <u>the same reports</u> can be run from their applicable area or from the pyramid.

AR Reports:



2 ADMIN @ Report Generator
File Info Help
Accounts Receivable Step 1: sele&report type
 0-Active chit list 1-Problem chit list 2-Payments this period 3-Payments select range of dates 4-Member activity this period (detailed) 5-Member activity prior periods (detailed) 6-Member activity prior periods (summary) 7-Member activity prior periods (summary) 8-Sales by minimim # - detailed 9-Sales by minimum # - summary 10-Member Aging report - Last month only 11-Member Aging report - Last month to today 12-Member Aging report - Last month to today 13-A/R Department Descriptions 14-Member Spending, decending order by Total \$ 15-Member Aging-NUMERICAL-MASTER ACCTS ONLY 16-Member Sales History by date range

System Reports:

ADMIN @ Configur	ation				
e Reports Info Hel	P				
C Company	O A/P	O Fixed Assets	C Inventory	O POS	Configuration
O Membership	O A/R	O G/L	O Payroll	O User rights	O Event Manager

2 ADMIN @ R File Info Help	port Generator	
∫System Adn	inistration	
Step 1: s	elect report type	
	any config Payable confiq	
2-Accts	Receivable config	
	Assets config ral Ledger config	
	aids confiq	
6-Empl	oyee/Payroll config	
	ory config	
	rights config ork node confiq	
	ibership config	
11-Clas	s Codes	
	g Codes	
	cial Interests s Billing Forecast	
	s Code Counts	
	cial Interest Counts	

Membership Reports:

É	ADMIN @ Accour	nt informatio	on for: # 207 -	Bob Anderson						ify Save Exit Billing to: 2 Newsletter to: 2 Misc meil to: 3 Stock (Y/N) N	_ 7 🛛
File	Global Editor Rej	oorts Info H	lelp								
		*		Fin <u>a</u> ncial	Notes	<u>I</u> nterests	Next ->	Lookup or	Kup or ncel Modify Save Exit ues Billing to: 2 B-209 Misc mail to: 3 Tax Exempt Stock (Y/N) N	- A	
	New	Delete	Main Info	User Defined	Photo	Stoc <u>k</u>	<- Prev	Cancel	Modify	Save	E <u>x</u> it
[N	Main Info Number	207.00			Class Co	ode G	Golf			— Billir	ng to: 2
	Last Name	Anderson	1		Dues Billing (Code G	125.00 current	t month dues		- Newslett	erto: 2
	First Name & M	Bob			Social S	Gec. # n666666	6	Locker# B-209		Misc ma	ail to: 3
	Occupation	Airline Pilo	ot		Review D	ate 2006052	20	т	ax Exempt	Stock (Y/N) N
	Birthdate	19680501	39	1					an an ann an	Vo	tes 0

🔁 ADMIN @ Report Generator	
File Info Help	
Membership Step Select report type 0-Name/#/Class 1-#/Name/Class 2-Name/#/Main telephone 3-Name/#/All phone & e-mail 6-Labels-address 1 7-Labels-address 2 8-Labels-address 3 9-Labels-billing address 10-Labels-newsletter 11-Labels-misc mail 12-Name/Occupation 13-Occupation/Name 14-Name/#/Birthday	Step 2: Select so sort by member sort by lastnam sort by joindate sort by joindate sort by classco sort by classco sort by classco sort by occupat sort by billingco sort by zipcode
15-Name/#/Joindate	
Step 3: Select which records to print?	
O All records	

New Custom GL Report Template:

There is a new template, **GLCTXTR**, that can be used to reverse the natural signs of summary data for a report. It will allow you to show income as a positive number and expenses as a negative. Profit (if any) can be shown as a positive with a loss as a negative. This template is normally used only for P and L type information, not balance sheet data.

J60.000 - Beverage sales Clear Report General Ledger 170.000 - 11 - Member beverage Period: 6 30000 - Non-member beverage Period: 6 100 - L2 Total Beverage Income 1 1 22.000 - 11 - Golf Cart Fregram Select Period: 6 22.000 - 11 - Golf Cart Fregram 3080.000 Normember beverage 1 22.000 - 11 - Golf Cart Fregram 3080.000 Normember beverage 1 22.000 - 11 - Golf Cart Fregram 3080.000 Normember beverage 1 100 - L2 Total Golf Income 10 3093.000 Total food & beverage sales 1 100 - L2 Total Golf Income 1000 - E1 - Food cost 3120.000 Greens fees 1 100 - L2 Total Food and Bev Expense Move DOWN 3122.000 Greens fees 1	Report#	Your report title (max=40 characters)		Report Format	Form	at Choic	es
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0 - L2 Total Beverage Income 3070.000 Member beverage 1 20.000 - 11 - Greens fees 3070.000 Member beverage 1 22.000 - 11 - Golf cart Program 3080.000 Non-member beverage 1 24.000 - 11 - Golf Cart Program 3090.000 Total beverage sales 1 2 27.000 - 11 - Golf Range 0 3099.000 Total beverage sales 1 3 0 - L2 Total Golf Income Move UP 3100.000 GOLF 1 0 20.000 - E1 - Food cost 3120.000 GoLF 1 0 1 30.000 - E1 - Swarage cost 3122.000 GoLF cares 1 1 0 - L2 Total Food and Bev Expense Move DOWN 3122.000 GoLF cares 1	Income Statement Income I	Period 6			Туре	Lvl	
20.001 - Greens tees Select Period 3080.000 Non-member beverage 1 22.000 - II - Golf Cart Program 3090.000 Total beverage sales 1 2 27.000 - II - Golf Cart Program 3090.000 Total beverage sales 1 2 27.000 - II - Golf Cart Program 3090.000 Total beverage sales 1 2 27.000 - II - Golf Range 3090.000 Total beverage sales 1 3 10.000 - E1 - Food cost Move UP 3100.000 GDLF 1 0 30.000 - E1 - Beverage cost 3120.000 Greens tees 1 1 20.000 - E1 - Sundry 3122.000 Golf car fees 1 1							
24.000 - I1 - Golf Cart Program 3090.000 Total beverage sales I 2 27.000 - I1 - Golf Range 3099.000 Total beverage sales I 3 0.000 - E1 - Food cost 3090.000 Total food & beverage sales I 3 0.000 - E1 - Food cost 3100.000 GDLF I 0 30.000 - E1 - Beverage cost 3120.000 Greens fees I 1 9.000 - E1 - Sundry -1.2 Total Food and Bev Expense I 1		Select Period					
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Move OP 3100.000 GDLF I 0 20.000 - E1 - Beverage cost 3120.000 Greens lees I 1 30.000 - E1 - Sundry			3099.000	Total food & beverage sales		3	Ĺ
30.000 - E1 - Sundry 3122.000 Golf car fees I 1		Move UP	3100.000 (GOLF	1	0	
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	100 - 11 - Golf Cart Program 100 - 11 - Golf Range 2. Total Golf Income 100 - E1 - Food cost 100 - E1 - Beverage cost 100 - E1 - Sundry		3124.000 (Golf Cart Program			
		<	3128.000	Total greens fees/cars	1	2	

ncome Statement				F	Report date:	20071001		Page
Custom Operating P/L Comparison - Summarized	Period 6	This Month	224 206224-005		Fiscal YTD	22:5 DEC 20:5 DEC		mpared to:
Description	Actual T/Y	Budget T/Y	Actual L/Y	Actual T/Y	Budget T/Y	Actual L/Y	YTD Budget	YTD Last Yr
Total Beverage Income	44.00			44.00		300.00	44.00	-256.00
Total Golf Income	943.50		147.00	943.50		508.00	943.50	435.50
Total Food and Bev Expense	-1,429.00		-9.75	-1,429.00		-89.75	-1,429.00	-1,339.25
Total Income Minus Expenses	-441.50		137.25	-441.50		718.25	-441.50	-1,159.75

New Module:

Club Data is pleased to announce a new module, Event Manager.

Event Manager is a calendar based scheduling tool that is an integrated add-on to Club Office. Call Club Data for features and pricing and to schedule a demonstration of Event Manager. In addition, specific information can be found in the user's manual found on the Club Data web site.

Event Event		Calendar Iter	n Detail Clear Screen	<u>M</u> odify	<u>S</u> ave Bill Ev	ent Cancel Event	Contract Builder E <u>x</u> i
Active Year 2007 Change Year	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
Active Month	2 Weekly Sunday Brunch	3	4 Anderson Reunion	5	6 Music Masters	7	8
hange Month	9 Weekly Sunday Brunch	10 Board Meeting	11	12	13	14 Jones Wedding	15 Jones Wedding Pool Closing Party
Calendar View List View	16 Weekly Sunday Brunch	17	18 Fall Scramble Breakfast Womens Fall Fashion Show	19	20	21 Bridge Club	22 Smith Wedding Smith Wedding
	23 Weekly Sunday Brunch	24	25	26	27 House Committee Pool Committee Meeting	28	29 Johnson Wedding
	30		Show All Room		1	Red	display Calendar

Please share this newsletter with all of your colleagues.

Bill Hallberg Club Data Sales and Support 952-941-0855

Instructions for downloading updates from the Club Data website:

- In ClubData.Com, go to Customer Login and then go to Software Updates. If you don't remember your login information, call Club Data.
- 2. Click on Club Office Professional

	a Customer Support tems and exceptional customer service
Home	Software Updates and Patches
Software Updates	Please click on a picture or link below to go to that respective download area.
Help/Procedures	Club Office Professional

3. Result:

Home	Club Office Updates & Patches
oftware Updates	Current Updates
	Prior updates
Help/Procedures	Supplemental Modules
FAQ	How to Install a Club Office Update
Miscellaneous	Current Updates (be sure to scroll down the list for any <i>new</i> items!)
Forms & Supplies	
Contraction of the	Updatecdco.exe - July 31, 2006 Download Now
Links	INSTALL THIS RELEASE IF YOU DO NOT HAVE SQLPOS POINT OF SALE. This release constitutes a complete release of all software modules, report templates and help files. After
Main Web Site	installation, when you try to start Club Office, you'll be taken to the database update utility. Run it and then start Club Office afterward.
	updatecdcoplus.exe - July 31, 2006 Download Now
	INSTALL THIS RELEASE IF YOU DO HAVE SQLPOS POINT OF SALE. This is for users who have
	SQLPos Point of Sale installed on their systems and it includes both the normal Club Office updat and SQLPos Point of Sale update in one installer package. Your SQLPos serial number is required
	for installation. After installation and running the database update, you can distribute the software update to the remote workstations via the SQLPos Control Panel.

- If you just have Club Office, click on the <u>updatecdco.exe</u> Download Now button.
- If you just have <u>both</u> Club Office and the SQLPos module, click on the <u>updatecdcoplus.exe</u> Download Now button.
- Follow the instructions to update Club Office.

- 4. <u>If you have SQLPos</u>, you <u>also</u> need to update each of the POS registers after Club Office has been updated. To update the registers:
 - Activate Heartbeat on each of the registers and then move to the SQLPos Control button on the pyramid.
 - Wait for each of the registers' unit number box to turn green.
 - Click in the Select box for each of the workstation units

Help				
1 ☑ 2 ☑	Closeout Workstation & Get All Data	Send Inventory, Member and Employee info to Workstations	Reset Item Buttons to Current A/R Department Configuration Settings	Clone Workstation
4	Backup Workstation databases to Central	Send ONLY Inventory Info to Workstations	Send ONLY Button/Config Settings to workstations	Manual Import - Sales Transactions
6	Set/Remove Session (ONLY if sessions are used)	Send ONLY Employee Info to Workstations	Send 'Everything' to Workstations	Manual Import - Inventory Transaction
9 🗖	Make Global Workstation Backup	Send ONLY Member Info to Workstations	Distribute Custom Multicommand REQuest (Advanced)	Import Off-Line Workstation Configurations
	Get ONLY Sales Transactions from Workstations	Check HeartBeat Pulse for All Workstations	Shut down SQLPos, keep HeartBeat running	Create Update for Off-Line Workstations
	Get ONLY Transaction History from Workstations	View/Print Button Configuration Settings	Shut down SQLPos AND Heartbeat	Refresh XACT Databases
	Get Button/Config Settings from Workstations	Reindex Workstation Buttons	Update Workstations with New Software	Archive XACT Databases
	25	Wait 60 seconds to	recognize the workstation:	S

 Press the red "Update Workstations with New Software" button (bottom of third column) and wait for the software to be pushed out to the workstations and the Unit # box turns green again. The process will actually involve shutting down the workstation and Heartbeat, updating the software, and then restarting Heartbeat and POS.