

Onboarding checklist

Help your staff run a full shift using Lightspeed! Do a practice run following your onboarding and review this checklist together.

*NOTE: Tasks marked with an * are typically performed by a manager or supervisor.*

Golf and Tee Sheet setup:

- Create Player Types*
- Create Memberships*
- Create Services*
- Create Packages*
- Create Employees*
- Create Booking Extras*
- Create and Apply Price Sheets*
- Create Tee Times*
- Sell outstanding monthly memberships*
- Create Upcoming Events
- Input Upcoming Reservations
- Add Stripe Account*

Booking and tee sheet management

- Create a reservation for 4 players or less
- Create a reservation for 8 players or more
- Create a recurring reservation
- Apply a package on a booking
- Remove the package from a booking
- Check out a single golfer
- Check out multiple golfers in the same reservation
- Check out multiple tee times and select Payer
- Mark a golfer as a No Show/Raincheck
- Add a public/private note
- Send a message from the Tee Sheet (Email + SMS)
- Squeeze a Tee Time*
- Add a customer to the database
- Add a payment method (*need Stripe*)
- Sell a membership
- Sell a package