

# 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\*

## Pro shop POS setup:

- Create Payment types
- Create Discounts
- Create Categories
- Create a new item
- Assign categories to Golf items
- Create Custom Menu buttons
- Create Purchase Orders
- Create Matrices
- Create/Apply Price Rules
- Create/Assign customer types
- Configure Payment Processor
- Setup Receipt Printer
- Import Inventory

## 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
- Issue/redeem a raincheck
- Add a private note
- Add a public note
- Send a message from the Tee Sheet (Email + SMS)
- Squeeze a Tee Time\*

## Manage customers and house accounts *(in Retail\*\*)*

- Add a customer to the database
- Add a payment method *(need Stripe)*
- Sell a membership
- Sell a package
- Create a credit limit\*\*
- Make an account payment and deposit\*\*

## Sales and inventory

- Open the register
- Add a customer to the sale
- Add an inventory item to the sale
- Apply a discount
- Sell, activate and manage gift cards
- Apply multiple payment types
- Process a refund & exchange
- Re-print receipt
- Do an inventory count
- Close the register
- Consult the End of Day report
- Consult the Closing Count report
- Consult the Grouped Sales Totals - Category Report