

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



Restaurant Practice run checklist

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

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

Administrative Tasks:

- Login to the Lightspeed App*
- Clock In/Out in the Lightspeed App
- Manage the Cash Drawer in's and out's using the Cash Drawer tool*
- Print closing reports and follow closing procedures*
- Modify floor plan from the iPad*
- Adjust the stock quantity on a particular product*

Table and order management:

- Navigate through the menu categories to view all products
- Use shortcut panel to change price and quantity of items added to an order*
- Open modifier popup for a product to change the selections
- Delete an item from an order
- Use the search function to search for a product
- Add a Note to a product
- Apply a discount to a product or an order*
- Start a bar tab and a takeout order
- Toggle between floor plans
- Toggle between menus (e.g. breakfast menu, dinner menu, etc.)
- Start a new table and place an order
- Check the time at which a menu item was ordered
- Assign orders to a specific seat in order screen
- Move an order to another table
- Move an item from one seat to another
- Adjust the number of seats on a table
- Change course of a product using the Actions button
- Change course of a product using the course popup
- Send the entire order to the kitchen then send individual Fire Course tickets
- Send partially-printed tables (send individual courses one at a time)

Manage bills and payments

- Print a receipt
- Accept payments and finalize an order
- Finalize a receipt with Auto-Finalize as well as no auto-
- Finalize* Retrieve a finalized receipt*
- Reimburse a finalized receipt*
- VOID a receipt*
- Sell, activate and manage gift cards
- Split bill by seat
- Split an item in the payment screen
- Drag an item from one receipt to another in the payment
- screen Split bill using single-seat checkout
- Split bill using selected items
- Apply a payment to a receipt using multiple payment types