End of Season Checklist

Golf

- ☐ **Turn off online booking** or block any remaining tee times
- ☐ Notify the support chat on the tee sheet to be switched to **Off Season** mode
  - ☐ If you don't want your members to receive membership expiry emails, ask support to mute your notifications (this will temporarily mute all notifications even from the tee sheet)
- ☐ Consult ***Business Intelligence*** reports to identify season trends for next season's rates
  - ☐ *01-Rounds -- 02 Pace Comparison* detailed revenue by month
  - ☐ *01-Rounds -- 03 Player Type / Product / State* for revenue by player type
  - ☐ *01-Rounds -- 06 Player Summary* to see how many rounds customers have played
  - ☐ *03-Customers -- 01 Overview & 02 Leaderboard* for breakdown of customers
  - ☐ *04-Subscriptions -- 01 Overview & 02 Sold* for data on subscriptions sold
  - ☐ *06-Packages -- 01 Overview* for data on your packages sold
- ☐ Begin creating next season's memberships and/or packages
- ☐ Use **PitchCRM** or the ***Segmentation*** report to email end of season promotions to your customers
- ☐ For House Accounts, consult ***Statements***, ***Aging Report*** and ***Balance Reports*** in Golf Reports

Retail

- ☐ Refer to the ***Payments Received Report, Lines and Category Reports*** for yearly totals
- ☐ Consult the ***Assets*** report for inventory data
- ☐ Complete an end of season inventory count
- ☐ Create discounts or price rules to sell remaining inventory/ have holiday promotions
- ☐ Consult the ***Sales Tax*** report

Restaurant

- ☐ Consult the ***Summary*** report
- ☐ Go to *Reports* - *Export* - ***Taxes*** for your tax report
- ☐ Go to *Reports* - *Export* - ***Payments*** to see your payments received report

As always, if you have any questions with any of the above or any other end of season items specific to your facility please reach out to your Account Manager!