

KNOWLEDGE ASSESSMENT QUESTIONNAIRE

CUSTOMERS

- ☐ Do you know how to add a new customer?
- ☐ Do you know how to make customer information fields required?
- ☐ Do you know where to locate the member balance, customer credit, and open invoice balance accounts?
- ☐ Do you know how to merge duplicate customers?
- ☐ Do you know how to create a new customer group?
- ☐ Do you know how to assign customers to customer groups?
- ☐ Do you know how to perform a bulk edit?

EMPLOYEES

- ☐ Do you know how to enter a new employee?
- ☐ Do you know how to assign employee permissions?
- ☐ Do you know how to create a custom employee permission role?

INVENTORY

- ☐ Do you know how to create a new inventory item?
- ☐ Do you know how to create a new department or category?
- ☐ Do you know how to create item kits?
- ☐ Do you know how to perform a bulk edit?
- ☐ Do you know how to set a max discount?
- ☐ Are your taxes set correctly?

GIFT CARDS

- ☐ Do you know how to sell a gift card?
- ☐ Do you know how to assign a gift card to a customer?
- ☐ Do you know how to look up a gift card balance?

TEE SHEET

- ☐ Do you know how to book a tee time?
- ☐ Do you know how to check in multiple golfers?
- ☐ Do you know how to add a block?
- ☐ Do you know how to repeat an event?
- ☐ Do you know how to issue a raincheck?
- ☐ Do you know how to add a squeeze?
- ☐ Do you know where and how to enter your green/cart fees?

POINT OF SALE

- ☐ Do you know how to issue a return from an existing sale?
- ☐ Do you know how to issue a return from scratch?
- ☐ Do you know how to add quick buttons?
- ☐ Do you know how to email or reprint a receipt?
- ☐ Do you know how to open and close the cash register log?
- ☐ Do you know how to switch terminals?
- ☐ Do you know how to charge to a customer's account?
- ☐ Do you know how to pay off an outstanding customer balance?

KNOWLEDGE ASSESSMENT QUESTIONNAIRE

FOOD & BEVERAGE

- ☐ Do you know how to create an F&B-specific inventory item?
- ☐ Do you know how to create sides?
- ☐ Do you know how to create and assign modifiers?
- ☐ Do you know how to rearrange your menu buttons?
- ☐ Do you know how to send an order to the kitchen?
- ☐ Do you know how to start a tab?
- ☐ Do you know how to split a ticket?
- ☐ Do you know how to charge to a member account?
- ☐ Do you know how to add a tip?

MARKETING

- ☐ Do you know how to send an email campaign?
- ☐ Do you know how to send campaigns to specific customer groups?
- ☐ Do you know how to save a campaign to your custom templates?
- ☐ Do you know how to sign a customer up for text marketing?

PASSES/MEMBERSHIP

- ☐ Do you know how to create a pass?
- ☐ Do you know how to link a specific price class to a pass?
- ☐ Do you know how to assign multiple customers to one pass (e.g. - couple or family pass)?
- ☐ Do you know how to assign a pass without selling it through the POS?
- ☐ Do you know when the pass is applied during the checkout process?

BILLING

- ☐ Do you know how to create a billing template that generates a statement?
- ☐ Do you know how to create an add-on template for additional charges?
- ☐ Do you know how to assign a customer to a billing template?
- ☐ Do you know how to set a customer up for autopay?
- ☐ Do you know how to save a credit card on file?
- ☐ Do you know where to find the Member Billing Audit report?
- ☐ Do you know how to create a household?
- ☐ Do you know how to sign up for a foreUP ACH account?

ONLINE BOOKING

- ☐ Do you know how to change the online booking pricing?
- ☐ Do you know how to create online booking specials?
- ☐ Do you know how to set up online booking groups?
- ☐ Do you know how to generate online credentials for your existing customers to give them access to the online booking portal?

REPORTS

- ☐ Do you know how to run the Z out report?
- ☐ Do you know how to run the employee time clock report?
- ☐ Do you know how to run an inventory levels report?
- ☐ Do you know how to run a department report?
- ☐ Do you know how to export a report to a PDF or Excel file?