



# Winter Shutdown Checklist

This checklist is designed to help you, the Operator, prepare your Club Caddie system for the off-season. Check items off as you complete your shutdown procedures!

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## REPORTS

- ☐ Rounds Breakdown by Resource ([How to run: Round Breakdown Report](#))
- ☐ Rounds Played ([How to run: Rounds Played Report](#))
- ☐ Sales by Department vs. buying plan ([Sales by Department](#) • [Sales Detail by Department](#) • [Sales by Payment Method](#) • [Payment Summary](#) • [Export Sales History](#))
- ☐ Inventory On-Hand ([On-Hand Report](#) • [Receive Inventory Report](#))

## Inventory & Vendors

- ☐ Switch to EOY inventory mode ([Inventory Audit](#))
- ☐ Final inventory audit and counts ([Inventory Audit](#))
- ☐ Start RA returns: ([Receive Inventory](#) • [Receive Inventory Report](#))
- ☐ Return defective/warranty items ([Inventory Change Log](#))
- ☐ Clean up vendor records and contacts ([Receive Inventory → Vendor List](#))
- ☐ Add or fix items/categories as needed ([Add/Manage Items](#) • [Manage Categories](#) • [Bulk Import/Export](#))

## Memberships & Accounts

- ☐ “Who owes you money” review and outreach ([Member Activity Report](#))
- ☐ Membership Aging, Member Balances, Payment Management exports ([Payment Management](#) • [How to view Balances \(Member Portal\)](#))
- ☐ Confirm Expire vs. Auto-Renew settings for off-season ([Membership Settings](#) • [Membership and Billing Setup](#))
- ☐ Write off bad debt where appropriate ([Member Ledger](#))
- ☐ Plan next-season rate changes ([Rack Rate Management](#))
- ☐ Identify classes needing manual renewal ([Bulk Expiring Member Classes](#) • [Membership Type Change Report](#))

- ☐ Draft “Early bird/online specials” (use [Rack Rate Management](#))

## **Tee Sheet Management**

- ☐ Block closure dates in Tee Sheet Settings (End Date) ([Tee Sheet Settings Overview](#))
- ☐ Turn off online inventory for closed dates ([Rack Rate Management → Booking Windows, Availability](#))
- ☐ Add staff-facing banner notes on the tee sheet for winter ops and closures ([Tee Sheet category — Banner Notes](#))
- ☐ Verify iFrame booking pages reflect closures and messaging ([Tee Time iFrame setup/troubleshooting](#))
- ☐ Pause/review tee-sheet email automations or Managed Marketing automations
- ☐ Verify third-party channels show “closed” and no inventory
- ☐ Review dynamic pricing rules tied to demand signals ([Rack Rate Management](#))
- ☐ Rounds reporting reference: [Rounds Reporting](#)

## **Vouchers and Credits**

- ☐ Review outstanding vouchers and rain checks
- ☐ Confirm expiration rules and COA mapping for rain checks
- ☐ Confirm expiration rules and COA mapping for credit books ([Credit Book Holding Accounts](#) • [Credit Book Distribution](#))
- ☐ Promote gift cards and holiday bundles ([Voucher Deposit from Register](#))

## **Staff & System Access (Best Practices)**

- ☐ Deactivate seasonal staff ([Course User Info](#))
- ☐ Set permissions by Role, not person ([Manage Roles](#), [User Role Permissions](#))
- ☐ Limit terminal visibility per role ([Terminal Access](#))
- ☐ Keep Terminal Management clean and labeled ([Terminal Management](#))
- ☐ Require unique logins and enable Employee PIN Lock ([Employee Pin Lock](#), [Course User Info](#))
- ☐ Restrict refunds, price overrides, exports, Settings to managers ([Manage Roles](#), [User Role Permissions](#))

## **Off-Season Revenue**

- ☐ Promote simulators, lessons, and winter events with Iframes or Managed Marketing
- ☐ Update iFrame banners and homepage placements

- ☐ Configure Online promo codes for seasonal offers, coming next week! ([Create and Apply Online Promo Codes](#))
- ☐ Review the display sequence for featured items

## **Events**

- ☐ Post all revenue and reconcile open events ([Post Revenue](#))
- ☐ Confirm year-end totals ([Event Finalization Report](#))
- ☐ Run Event Aging and close out ([Event Charge Summary Report](#) • [Event Service Type Report](#) • [Events Adjustment Report](#) • [Event Tracking](#))

## **Taxes & Compliance**

- ☐ Review taxes collected and outstanding liability ([Sales by Month by SKU](#) • [Payment Summary](#))
- ☐ Confirm new tax rates for next year ([Tax Management Overview](#))
- ☐ Ensure gift card and credit liabilities are properly accounted ([Credit Book Holding Accounts](#) • [Credit Book Distribution](#))

## **Communications**

- ☐ Update website/app banners with closure and reopen target
- ☐ Send member communications for gift cards, credits, and winter offerings
- ☐ Boost key promos to top placement in app and homepage