Before you go live checklist

1 Check your account setup

- [ ] **Review inventory and options**
  - [ ] Correct dates and availability
  - [ ] Accurate pricing and taxes
  - [ ] Clear images and descriptions

- [ ] **Settings**
  - [ ] Company information is accurate
  - [ ] Payment gateway is attached
  - [ ] Billing information is up to date and correct
  - [ ] Terms and Conditions are updated in Templates

- [ ] **Notifications**
  - [ ] Add any additional messages you want your customers to receive
  - [ ] Make sure the right people are notified in Manage Alerts

- [ ] **Rules and Availability**
  - [ ] Check that any blackout dates or promotions are active and working as expected
  - [ ] If you’re using Resources, test adjustments to ensure availability changes as you expect

2 Test the booking process

- [ ] **Make a booking on the Point of Sale**
  - [ ] Practice sending notifications and review what your customer will receive
  - [ ] Sign waivers (if applicable) and view them on the booking
  - [ ] Check that resources are assigned correctly (if applicable)
  - [ ] Apply a small payment and update the booking status to Received

- [ ] **Check your booking page**
  - [ ] Ensure links are work correctly and make a test booking
  - [ ] Check that your gateway can take payments seamlessly
  - [ ] Review any template and design changes
  - [ ] Review your product listings for accuracy and presentation

- [ ] **Get familiar with the daily manifest and dispatch**
  - [ ] View the manifest and dispatch for the dates of your test bookings
  - [ ] Test a booking check-in on the manifest and dispatch
  - [ ] Review booking status on the manifest
  - [ ] Add contact information to a booking via dispatch

- [ ] **Cancel all test bookings**
  - [ ] Change the booking status to Cancelled
  - [ ] Process refunds for any test credit card payments

3 Add users

- [ ] Add additional users who should have access to the account
- [ ] Create security groups to limit users’ access to unneeded parts of the system
- [ ] Assign the correct security group to each user
- [ ] Ensure everyone has their own login
- [ ] Remove any test users or user accounts that won’t be needed once you go live

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