TEEDECK

TeeDeck — Setup & Testing Guide

Welcome! Your test club has already been provisioned and the payment processor is wired up — you've been emailed an admin login. This guide walks you through getting your club set up the way you want it, then takes you through every feature worth trying.

Checkboxes `[ ]` are steps to tick off as you go. Skip anything that doesn't apply to your club.

There's a feedback questionnaire at the end — that's the part we most want filled in.

TL;DR

- **Your club:** `https://<your-slug>.teedeck.dev` (slug is in your invite email)
- **Where to log in:**
  - **Club admin** → `/admin/login` (you start here)
  - **Staff** → `/staff/login`
  - **Members** → `/login` (public-facing)
- **Test mode badge** — every page that touches payments shows a yellow "Test mode" badge. As long as it's visible, no real money moves.
- **Stuck?** Your dashboard has a yellow **"What to try"** widget at the top with clickable links to the most-relevant features. Hidden in production — it's there to help you find things during testing.
- **Test card** — to put a charge through, use Stripe's test card: `4242 4242 4242 4242`, any future expiry, any 3-digit CVV, any ZIP.

Part 1 — Get oriented (5 minutes)

- [ ] Open the admin URL from your invite email and sign in
- [ ] You should land on the **dashboard**. Look at the yellow **What to try** widget at the top — a checklist of clickable shortcuts to the most useful features. Tick them off as you go; verified ones turn green automatically. It's the fastest way to find things, and it covers most of what this guide walks through.
- [ ] In the left sidebar, click around: **Members**, **Courses**, **Tee Times**, **Tee Time Schedules**, **Sales → Orders / Payments / Products**, **Settings**. Just get a feel for the navigation — we'll come back to each.
- [ ] Top-right, click your avatar → **My account** to see what staff see for their own profile

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Part 2 — Set up your club

This section is the order most clubs follow when onboarding. You can do them in any order, but doing them in this order means you're not booking tee times that don't have a course yet, etc.

2.1 Brand your club

> Settings → Branding

- [ ] Upload a **logo** (square PNG works best, transparent background)
- [ ] Upload a **favicon** (the little icon in browser tabs — 16×16 or 32×32 ICO/PNG)
- [ ] Upload a **hero image** (large landscape — used as the big banner on the member portal homepage). Photos of the course at sunrise tend to look great.
- [ ] Fill in **tagline**, **address**, **phone**, **timezone**, **currency**
- [ ] Save

> Settings → Theme

- [ ] Try each theme — **Classic**, **Modern**, **Vivid**, **Editorial**, **Coastal**. Open the member portal in another tab and refresh after each save to see the look.
- [ ] Pick whichever fits your club's feel and save

2.2 Add a course

> Courses → New

Every tee time has to live under a course, so this is the foundation.

- [ ] **Name** (e.g. "Championship 18" or just "The Course")
- [ ] **Holes** — 9 or 18
- [ ] **Green fee** + **cart fee** — default prices per player
- [ ] **Hours / days** the course is open
- [ ] **Cancellation hours** — the cut-off after which a member cancel is no-refund (e.g. 24 hours)
- [ ] **Booking window** — how far ahead members vs the public can book
- [ ] Save

You can add multiple courses if your club has them.

2.3 Build a tee-time schedule

> Tee Time Schedules → New

This is what generates the actual bookable slots from your course's hours. You'll only do this once per course (or as needed).

- [ ] Pick the **course**
- [ ] Set the **time range** (e.g. 7:00 AM – 5:00 PM)
- [ ] Set the **interval** (typically every 8, 10, or 12 minutes)
- [ ] Pick **dates** to generate — start with a week to keep it light
- [ ] Save. You should see slots populate under **Tee Times**.

2.4 Add a test member

> Members → New

- [ ] Fill in a **name**, an **email you can receive at**, and a **membership type**
- [ ] Save
- [ ] Check that email — you should get a "set your password" link. Use that to log in as the member later for the booking test.

2.5 Add a staff user

> Staff → New (under Club, lower in the sidebar)

- [ ] Add at least one user for each role you want to test:
  - **Club manager** — full admin access, bypasses the geofence
  - **Pro shop staff** — POS + member lookup
  - **Restaurant staff** — POS only
  - **Starter** — tee sheet only
- [ ] Each gets an invite email with a password-set link

2.6 (Optional) Set the staff geofence

> Settings → Staff geofence

Only matters if you want staff sign-ins restricted to people on-property (useful for shared tablets). Owners and managers always bypass it.

- [ ] Drop a pin on the club, drag the radius (300m default is fine)

- [ ] Save — non-bypass staff are now geofenced

2.7 (Optional) Set up lessons, sim sessions, or range bays

TeeDeck can book more than just tee times. Skip this section if you're only testing golf.

- [ ] **Booking → Services → New** — define a bookable service. E.g. "60-min Private Lesson": duration 60, price 7500 (¢ = $75.00), deposit 25%, capacity 1, requires 1 person + 0 spaces
- [ ] **Booking → Instructors & Spaces → New** — add an instructor ("Coach Rodriguez" — type=Person) and/or a space ("Sim Bay 2" — type=Space)
- [ ] On the instructor's edit page, click **Weekly hours → Add hours** — e.g. Monday 8:00 to 17:00. Without weekly hours, no slots will be bookable.
- [ ] (Optional) **Booking → Lesson packages → New** — create a "10-Lesson Pack" for $650. Members can buy the pack and spend credits on future lessons.

How members find it: the public portal picks up "Lessons" and "Packs" nav items automatically once you have active services / packages. So after step one above, browse to your portal and you'll see the new nav items.

2.9 (Optional) Register card-present terminals

> Terminals → Add terminal (under Sales)

Skip if you're only testing online checkout.

- [ ] Give the terminal a **friendly name** ("Pro shop counter", "Bar")
- [ ] **Processor** — Dejavoo for now (others coming)
- [ ] **Terminal Profile Number (TPN)** — from your processor's portal
- [ ] **SPIn Auth key** — exactly 10 characters
- [ ] Save

You can register multiple terminals — the staff "Charge to card" modal will let staff pick which one to wake.

2.10 Preview the member portal

- [ ] Open `https://<your-slug>.teedeck.dev` in a new browser window (incognito so you're not logged in as admin)
- [ ] You should see your branding, your hero image, your tagline
- [ ] Click **Book** — see the courses, tee times, prices

If anything looks off (logo wrong size, hero image stretched, theme not what you picked) — that's a feedback item.

Part 3 — Test the flows

Order things however suits you. Tick the boxes as you go.

3.1 Member — book a tee time online

- [ ] Open the public portal in a private/incognito window
- [ ] **Book** → pick a course, date, open slot
- [ ] Fill in name, email, phone, players
- [ ] Continue to checkout
- [ ] You should see the payment form
- [ ] Use the **Stripe test card** `4242 4242 4242 4242` (any future expiry, any 3-digit CVV)
- [ ] **Tick "Save card for next time"** so we can test the saved-card flow next
- [ ] Submit — you should land on a confirmation page
- [ ] Check your email for a booking confirmation + a receipt

Notice: was the "Test mode" badge visible the whole time? Did the form feel slow at any point? Were error messages helpful if you mistyped?

3.2 Member — book again with a saved card

- [ ] Log in as the same member who booked in 3.1
- [ ] Book another tee time
- [ ] At checkout you should see **"Visa ····4242"** as a radio option ABOVE the new-card form
- [ ] Select it, submit — no card form should appear; the saved card is used directly
- [ ] Confirmation should come through normally

3.3 Member — view / manage payment methods

- [ ] Logged in as a member, click your profile menu → **Payment methods**
- [ ] You should see the card from 3.1
- [ ] If you have more than one, try **Make default** on a non-default
- [ ] Remove a card — confirm it's gone from the list AND the next checkout no longer offers it

3.4 Member — cancel a booking

- [ ] In **My Bookings**, cancel a booking (only works outside the no-refund window your course is set to)
- [ ] If you'd paid, the deposit should come back as **booking credit** on your profile
- [ ] On your next booking, that credit auto-applies at checkout

Edge case worth flagging: try cancelling a booking that's INSIDE the no-refund window. The slot should release back to the tee sheet but no refund should happen.

3.5 Member — apply a voucher

> If you don't have a voucher code to test with, skip this section or ask the dev team to issue one.

- [ ] At checkout, click **"Have a voucher code?"**
- [ ] Enter the code, **Apply**
- [ ] Discount should appear in the total breakdown
- [ ] If the voucher fully covers the booking, the page should show "Confirm booking (fully covered)" — no card needed

3.6 Member — book a lesson (or sim / range)

> Pre-req: at least one Service exists + its required Resource(s) have weekly hours (see 2.7).

- [ ] Open the public portal in a private window
- [ ] Click **Book a Lesson** in the nav
- [ ] Pick a service, pick a date → available slots appear in a grid
- [ ] Click a slot → confirmation page shows the assigned coach + space
- [ ] Complete the deposit (Stripe test card) → land on confirmation
- [ ] The booking appears under **Booking** → **Lesson bookings** in `/admin`

Notice — SlotCalculator hides:

- Slots outside the coach's weekly hours
- Slots that overlap existing bookings (plus buffers)
- Slots in the past

3.7 Member — buy and spend a lesson pack

> Pre-req: at least one active LessonPackage (2.7).

- [ ] Click **Packs** in the portal nav → **Buy pack** on any offer
- [ ] Pay with the Stripe test card
- [ ] **My Packs** in the profile menu shows the credit balance
- [ ] Book another lesson for the SAME service the pack is for
- [ ] At checkout, you should see "**Pay with a lesson pack**" radio ABOVE the card form
- [ ] Select it → confirm → the booking is created with `payment_method = package_credit` and one credit is burned
- [ ] Back on **My Packs**, the count decrements

3.8 Member — social login (optional)

> Only works if Google / Apple OAuth has been wired up by the dev team. Skip if you don't see those buttons at `/login`.

- [ ] At `/login`, click **Continue with Google** (or Apple)
- [ ] Authenticate
- [ ] First time: a new TeeDeck account is created from your Google profile
- [ ] **Try this**: log out, then try logging in with email/password using the same email. You should be told to log in with the password first (this is the account-takeover guard, working as intended)

3.9 Staff — tee sheet check-in

- [ ] At `/staff/login`, sign in as a staff user you created in 2.5
- [ ] Open **Tee Sheet** — today's bookings, grouped by tee time
- [ ] Tap a group → **Check in**. The booking turns green / moves to "checked in"
- [ ] Try **Mark no-show** on a group whose tee time has passed
- [ ] Find the **Print** action — opens a printer-friendly tee sheet (test that it actually prints from your printer)

3.10 Staff — open a tab, add items

> Pre-req: at least one product exists. Add a couple under **Sales** → **Products** if you haven't yet.

- [ ] **Hub** → **Open new tab** — pick Restaurant or Retail type
- [ ] (Optional) attach a member by searching
- [ ] Use **Quick Add** to ring out common items quickly
- [ ] Try **Void** on a line you added by mistake
- [ ] Try **Comp** on a line item — knocks the price down
- [ ] Total should recalculate correctly each time

3.11 Staff — charge a tab to a terminal

> Pre-req: at least one terminal registered (Part 2.7).

- [ ] On an open tab, click **Charge to card**
- [ ] Modal appears with a terminal picker
- [ ] Pick a terminal, click **Wake terminal**
- [ ] On a real reader, the customer taps. On a sandbox/simulator it auto-approves after a couple seconds.

- [ ] Modal should flip to a green check + "Payment approved"
- [ ] Tab status changes to **Paid**

3.12 Staff — bill a tab to a member account

> Pre-req: a member with a house account. Create one from **Members → {member} → Edit → House account**.

- [ ] Open a tab, attach that member
- [ ] At checkout, choose **Member Account** as payment method
- [ ] Confirm — the tab is paid; the balance is added to the member's house account ledger

3.13 Family / corporate accounts — who may charge

> Pre-req: a house account with a **primary** member and at least one other member linked to it.

- [ ] **Members → {member} → Edit → House account** — link a second member to the same account
- [ ] Open a tab for the linked member and bill it to the account — it should go through, and land on the ledger against *their* name while the primary is the one billed
- [ ] Back in admin, **block** that member from charging, then try the same tab again — it should be **refused at checkout**, not silently accepted. This is the control a club needs when a member's privileges are suspended mid-month.
- [ ] Set the account's **charging mode** to *signers only* and confirm only approved signers can charge — the corporate-account pattern
- [ ] Flip the account to **Disputed** and confirm new charges are blocked while the existing ledger stays intact

3.14 Month-end statements

This is the part that replaces mailed invoices and chasing cheques — worth testing properly if your club runs accounts.

- [ ] With a few charges on an account, run a month close from the house-account admin (**Close month**)
- [ ] A **statement** appears with opening balance, charges, payments and closing balance. The numbers should reconcile: opening – charges + payments = closing
- [ ] **Email statement** — the primary member receives the PDF. Clicking it twice in a row should *not* send twice
- [ ] Re-run the month close and confirm it does **not** create a second statement or double-count anything
- [ ] Record a payment against the account and confirm the balance and the statement both reflect it
- [ ] **Reports → House Account Aging** — outstanding balances bucketed 0–30 / 31–60 / 61–90 / 90+ days, with a CSV export for your bookkeeper

3.15 Auto-pay

- [ ] As the primary member, go to **House Account** in the member portal — you should see the balance, recent activity, statements, and an **auto-pay** toggle
- [ ] Add a card under **Payment methods** if there isn't one, then turn auto-pay **on**. The panel should name the card that will be charged
- [ ] Close a month with a balance owing — the statement should be paid automatically from that card, and show as **Paid**
- [ ] Confirm the ledger shows a matching payment entry, so the balance nets to zero rather than being marked paid without a record
- [ ] Turn auto-pay off and confirm the next close leaves the statement unpaid for manual payment

3.16 Admin — refund a payment

- [ ] **Sales → Payments** — list of every transaction taken
- [ ] Find one in **Captured** status, click **Refund**
- [ ] Optionally refund a partial amount + enter a reason
- [ ] Submit — should see "Refund issued" toast
- [ ] Status flips to **Refunded**; member gets a refund email

3.17 Admin — import members from CSV

- [ ] **Members → Import**
- [ ] Download the sample CSV from the import page
- [ ] Fill in 3–5 test members, upload
- [ ] Confirm they appear in the member list
- [ ] If any rows failed, check the failed-imports CSV download — was the error message clear enough to fix the row?

3.18 Edge cases worth poking at

- [ ] Try logging into `/staff` from off-property — should be blocked if you set a geofence in 2.6 (you can fake your location in Chrome dev tools → Sensors)
- [ ] Use a card that declines (`4000 0000 0000 0002`) — booking should fail gracefully; no half-made reservation left behind
- [ ] Refresh the checkout page a few times before submitting — the same payment session should be reused, not new ones each time
- [ ] Apply a voucher, then change the player count — total should recalculate; voucher should still apply
- [ ] Book a tee time using booking credit; cancel it — credit comes back

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Part 4 — Feedback we want

After you've poked around, fill this in (free text — paragraphs, lists, screenshots, anything).

4.1 What was confusing?

Anywhere you had to think for more than 5 seconds about what to click or what a field meant. We'd rather make the screen self-explanatory than write a manual — so the smallest hesitation is useful to hear about.

4.2 What broke?

For each issue, the most useful info:

- **Which page / URL** were you on?
- **What did you do?**
- **What happened vs what you expected**
- **Browser + OS** (e.g. Chrome 121 on macOS 14)
- **Screenshot** if possible

4.3 What's missing?

Features you expected to be there but weren't. Tell us the **need** — we'll figure out the right shape on our side.

4.4 What surprised you (good)?

Sometimes things work better than the user expected. Tell us — that's where we should invest more.

4.5 Mobile / tablet impressions

If you used the staff or admin panels on a phone or iPad, anything feel cramped, hard to tap, or laid out weirdly?

4.6 Performance

Anywhere felt slow? Even one specific slow page is useful to know about — give us the URL and what you were doing.

Known not-yet-built

So you don't waste time hunting these:

- **Recurring memberships / dues billing** — not yet
- **Tournament management** — not yet
- **Course ratings / handicap tracking** — not yet

- **Receipt printer integration** — email/SMS receipts only for now
- **Tipping at the terminal** — not yet (gateway-dependent)
- **Stripe 3DS-required saved-card charges** — works for the initial card entry; saved-card re-charges with strong-auth required will fail until we add the next-action handling

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Reporting feedback

Please send your filled-in answers to **[email / Slack channel]** along with a tag for which test scenarios you covered. Don't feel you need to do all of them — focused depth on a few areas beats shallow coverage of everything.

Thanks for testing!