Go Live Checklist for Clients

09/08/21
01.00.00

User Access

- [ ] User Access set up for all team members
- [ ] All users confirm that they can access their Anchor Accounts
- [ ] Refund settings are checks for all users
- [ ] Users have access to the necessary reports (ie. Manifest)
- [ ] At least one Admin user is trained and dedicated to ongoing building and schedule adjustments in Event Builder
- [ ] At least one Admin user is designated to set up and train new users in Anchor
- [ ] At least one Admin user should have access to the Payment Gateway Account (Authorize.net) to view settlements, make manual refunds, and check any transaction issues if needed.

Hardware

- [ ] POS Computers have been set up with cash drawers (if applicable) & credit card devices
- [ ] All Scanners are charged and in working order.

Dock Access App

- [ ] Dock Access App has downloaded to iPhone scanners and a login test completed
- [ ] Test scanning a ticket for a correct time to verify a successful scan and check in the ticket
- [ ] Test scanning a ticket for an incorrect time to verify the correct alert is appearing

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Dock Access App

- [ ] Search for customer in Dock Access
- [ ] How to check in a guest manually
- [ ] How to uncheck-in a guest
- [ ] How to override a ticket (if allowed)

Box Office

- [ ] All available services (Tours) including applicable tickets & products are visible in Box Office ready for purchase
- [ ] Pricing for all tickets has been audited for accuracy by the client
- [ ] The Schedule has been reviewed for accuracy of times, dates, capacities, and vessels.
- [ ] Any special capacities (ie. window seats) have been checked for accuracy and added to the applicable tours
- [ ] Test of a live purchase using in-person credit card device has been completed successfully
- [ ] Email confirmations have been reviewed and approved
- [ ] Text Confirmations have been reviewed and approved.
- [ ] Invoices for Companies have been tested and checked
- [ ] **Ticket booth staff know how to complete the following tasks**

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Box Office

- [ ] Make a new booking in either the Quick Sale or Reservation using these payment types.
    - [ ] Cash
    - [ ] Credit (manual)
    - [ ] Credit (EVM)
    - [ ] Gift Card
- [ ] Search for an existing booking using the booking id, email or name.
- [ ] Apply a coupon code to an order
- [ ] Validate a gift card
- [ ] Transfer a booking to a new date/time
- [ ] How to switch a round trip to a one way (if applicable)
- [ ] Combine an order (if applicable)
- [ ] Refund a booking to a specific from of payment
- [ ] Make a booking for a company (sell on behalf of) (if required)
- [ ] Run a boarding report
- [ ] Run an attendees report
- [ ] Add tickets to an existing booking

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Box Office

- [ ] Add enhancements (add-ons) to an existing booking
- [ ] Run and read the Event Schedule
- [ ] Check availability in the event schedule
- [ ] Reprint a ticket from the Service Order page
- [ ] Resend an email confirmation from the Service Order page
- [ ] Text a ticket to a customer from the Service Order page
- [ ] Complete and balance a Cash drawer settlement on a POS machine
- [ ] How to use Manage my booking

Charters (if applicable)

- [ ] Charter Manager knows how to add Contract Wording (if required)
- [ ] Charter Manager knows how to create a charter proposal (if required)

Anchor Backend

- [ ] Tour Pages have been checked for content accuracy
- [ ] Products have been checked for content accuracy
- [ ] Scanning Rules are checked and approved
- [ ] Vessel Pages (if applicable) have been checked for content accuracy

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Anchor Backend

- [ ] POS Nodes and Internal Office Node has been set up and connected to the Payment Gateway
- [ ] Event Builder – Taxes, convenience fees, cost rates a
- [ ] Any Promo codes that have been added are accurate and tested
- [ ] Any Companies with Cost Rates that have been added have been checked and rates have been tested in Box Office to ensure all tickets appear with the correct rate.
- [ ] **Admin user knows how to complete the following tasks.**
    - [ ] Edit Dates & Times
    - [ ] Edit Capacities by sales channels & Vessels
    - [ ] Update event Status
    - [ ] Create a new schedule in the event builder
    - [ ] Add an new date to an existing schedule (build)
    - [ ] Admin user knows how to update prices in a Build
    - [ ] Admin user knows how to update Charter Pricing (if required)
    - [ ] Add a new Tour
    - [ ] Add a new Product
    - [ ] Add a new Package (if required)
    - [ ] Create a new coupon

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Anchor Backend

- [ ] Update scanning rules (if required)
- [ ] Add new users
- [ ] Run a Report in Anchor
- [ ] Schedule a report in Anchor
- [ ] Reverse a payment
- [ ] Set up an email or text template and send them via the boarding report
- [ ] Update Charter Terms & Conditions in setup (if applicable)
- [ ] Add Docking Locations in Setup (if applicable)
- [ ] Add new cost rates in Anchor
- [ ] Update a GL
- [ ] Add Onboard Revenue
- [ ] How to run a bulk invoice for a company

Hosted Website or SDK sites

- [ ] Hosted Website URL is correct
- [ ] Hosted Website layout and overall design is approved
- [ ] All pages on the new website are functioning with no errors
- [ ] Access to the website to self-manage has handed over

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SDK Integrations

- [ ] SDK has been integrated with the website and test bookings have been made on the site

All sites

- [ ] All available services including tickets & products, are visible on the website for sale
- [ ] No internal tickets are visible on the public website
- [ ] All pricing, taxes and fees for tickets is accurate on the website
- [ ] Terms and conditions are correct on the website
- [ ] Manage my booking (Account) page is active on the website and Self-Service module is integrated
- [ ] Gift Card Page is active on the website and displaying correctly
- [ ] Social Media Icons on the site are clinked to the correct pages
- [ ] All navigation links work on the site and link to the correct pages
- [ ] Page is available on the site for Proposals (if required) and SDK is integrated
- [ ] Page is available on the site for order details (Make a Payment Page) and SDK is integrated