BookingsPlus Online Help Knowledge Base PDF

Created on: 21/01/2025 11:37 am GMT

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GDPR & Privacy Policies

Last Modified on 28/06/2018 11:02 am BST

Following the General Data Protection Regulation (GDPR) legislation which was implemented on 25th May 2018, we have been making changes to BookingsPlus to ensure we are compliant and also give you the ability to manage your clients data.

Please see the articles on the left to find out more.

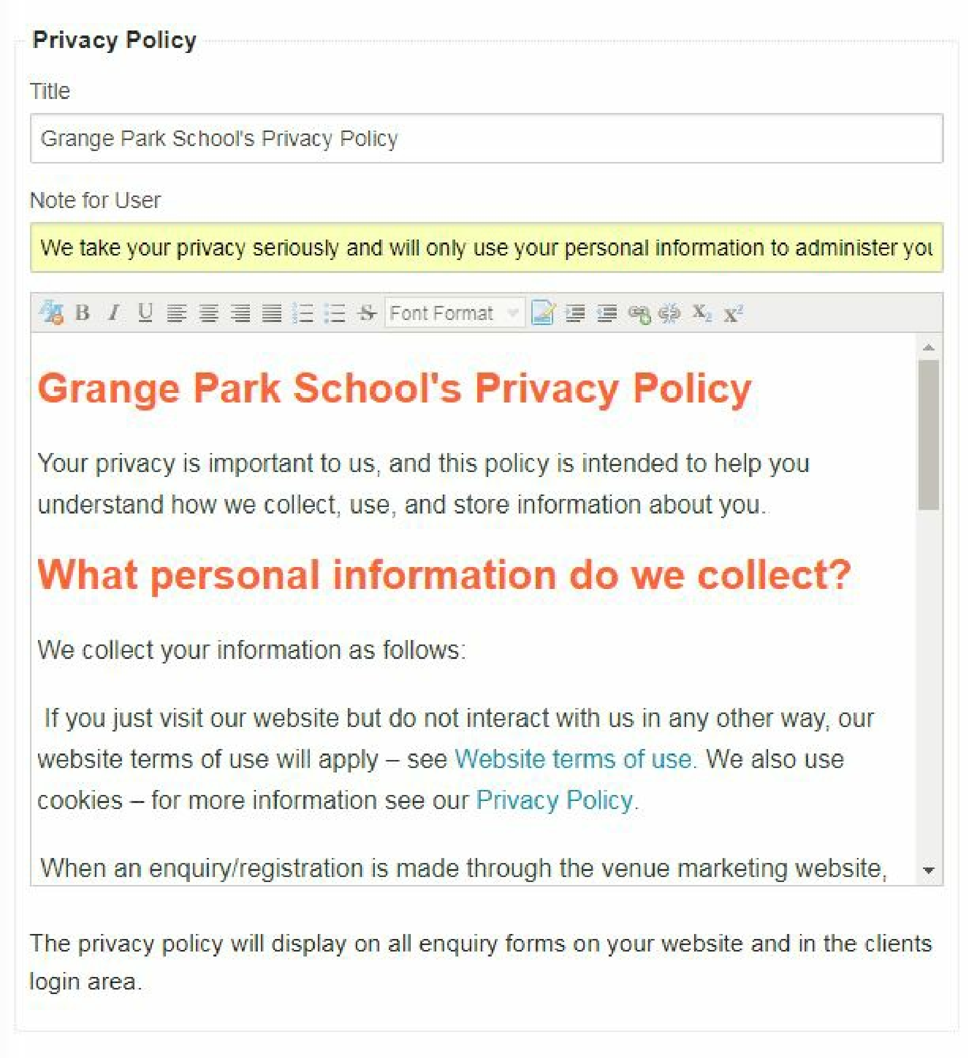
Set-up Privacy Policy and Marketing Preferences

Last Modified on 11/09/2023 11:16 am BST

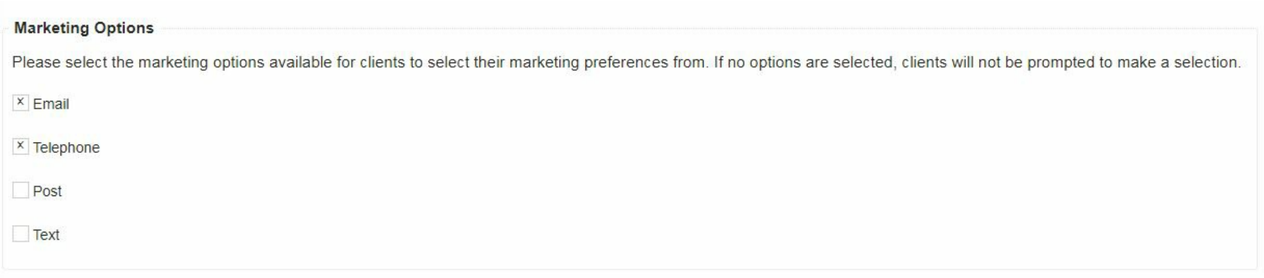
BookingsPlus allows you to present your privacy policy to both your enquirers and your clients, and also enables you to capture their marketing preferences. This can be set up as follows:

From the Manage tab, choose Edit Venue and the Client Login tab. Fill in the Privacy Policy form with a title, a note for the user (this will display above the 'I agree to the Privacy Policy' on your marketing website only), and complete the main body with your privacy policy detail.

Note that there is a character restriction of 255 on the 'Note for user'.



If you would like to also include the option for your enquirers and clients to opt in to marketing and to communicate their preferred methods, then tick which options you would like to give them a choice from:



Next, choose 

in the top right. When you click save, this will add your privacy policy and marketing options to each enquiry form on your website so that you can be sure that each enquirer has read your privacy policy and indicated their preferred method for marketing. The privacy policy and marketing options will then be presented on the dashboard of your client's account. Your clients also have the ability to amend their marketing options in their account at any time.

If you wish to upload a new privacy policy or terms at any time (to websites and client accounts), just amend the text in the form and remember to hit 

. If the forms are left blank, then they will not display on the websites and client accounts.

Please note that, if your venue is still set-up with uploaded PDF terms and conditions, this format will still display until you update to the new format.

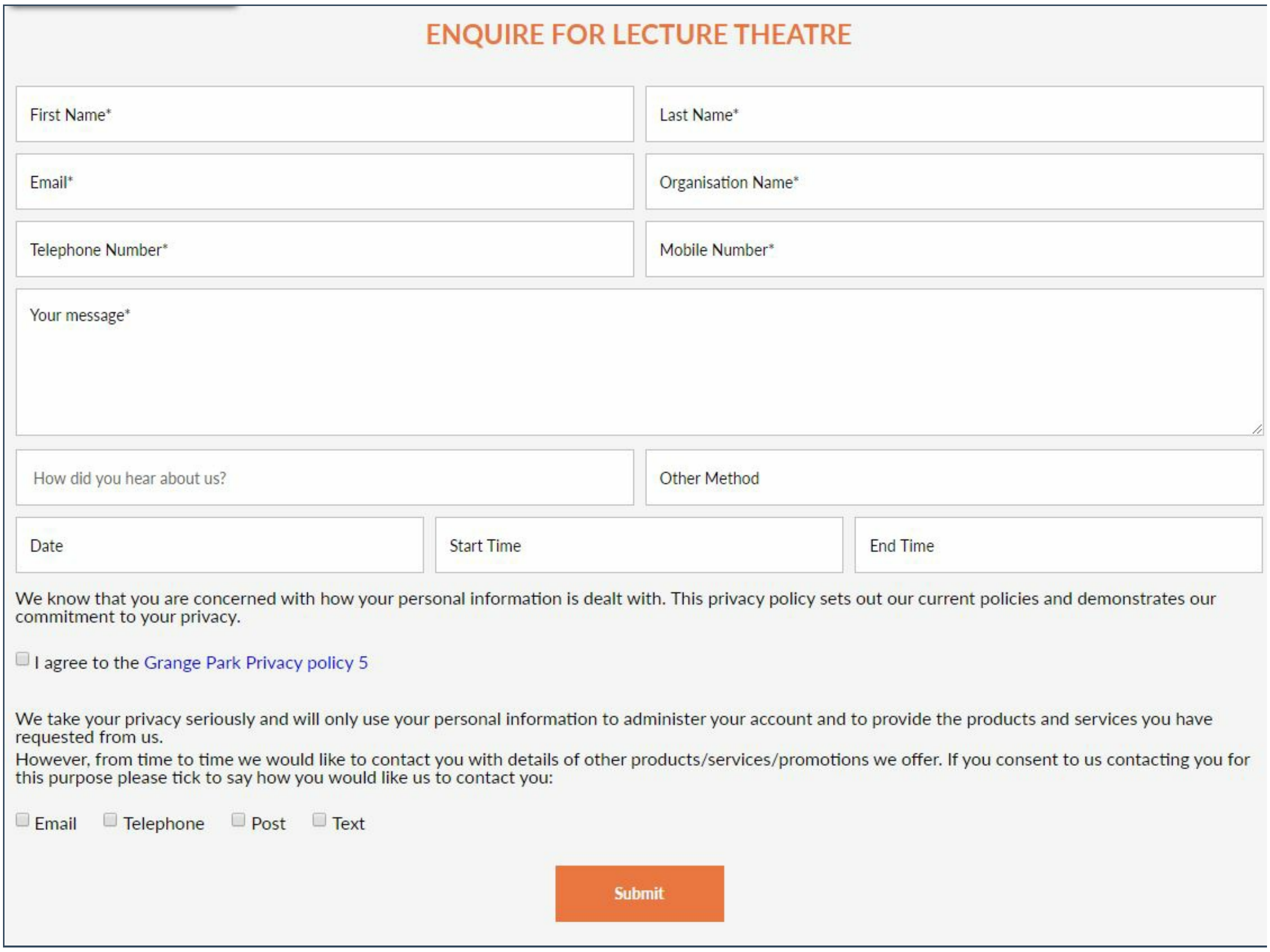
To see what your clients will be presented with, please see article: Privacy Policy & Marketing Preferences on the Clients Account
To see what will be displayed on your marketing website, please see article: Privacy Policy & Marketing Options on Enquiry Forms on Websites

Privacy Policy & Marketing Options on Enquiry Forms on Websites

Last Modified on 18/02/2022 11:57 am GMT

BookingsPlus provides you with the option to present your privacy policy on all of your enquiry forms on your website, and also to display marketing options for enquirers, enabling them to opt in to your marketing communications. These are optional. To set these up, please see article: Set-up Privacy Policy and Marketing Preferences

Depending on the type of website template you are using, the enquiry forms on your websites will look similar to below:



ENQUIRE FOR LECTURE THEATRE

First Name*
Last Name*
Email*
Organisation Name*
Telephone Number*
Mobile Number*
Your message*
How did you hear about us?
Other Method
Date
Start Time
End Time

We know that you are concerned with how your personal information is dealt with. This privacy policy sets out our current policies and demonstrates our commitment to your privacy.

☐ I agree to the Grange Park Privacy policy 5

We take your privacy seriously and will only use your personal information to administer your account and to provide the products and services you have requested from us.
However, from time to time we would like to contact you with details of other products/services/promotions we offer. If you consent to us contacting you for this purpose please tick to say how you would like us to contact you:

☐ Email ☐ Telephone ☐ Post ☐ Text

Submit

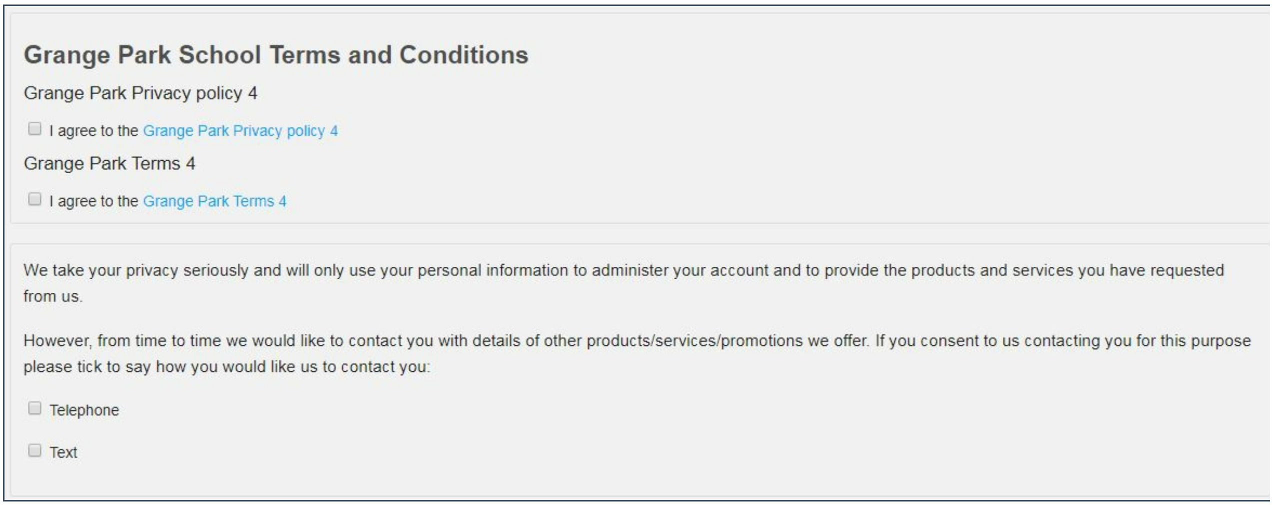
The text above the tick box for agreeing to the privacy policy is defined by you. We have provided an example of the text that could be used here. Please note that the text above the marketing tick boxes is fixed and cannot be changed at this time.

Privacy Policy & Marketing Preferences on the Clients Account

Last Modified on 18/02/2022 12:02 pm GMT

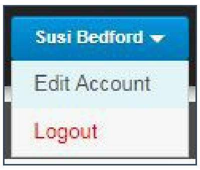
BookingsPlus enables you to present your privacy policy to your clients in their online account and also allows you to display your chosen marketing options to them. To set this up please see our article: Set-up Privacy Policy and Marketing Preferences

Once you have set-up your privacy policy and your preferred marketing options your clients will be presented with these the next time that they log into their account. They will be able to view your privacy policy and click to agree and also will be able to indicate their preferred marketing options. If you have also added some new terms these will also display for their agreement.

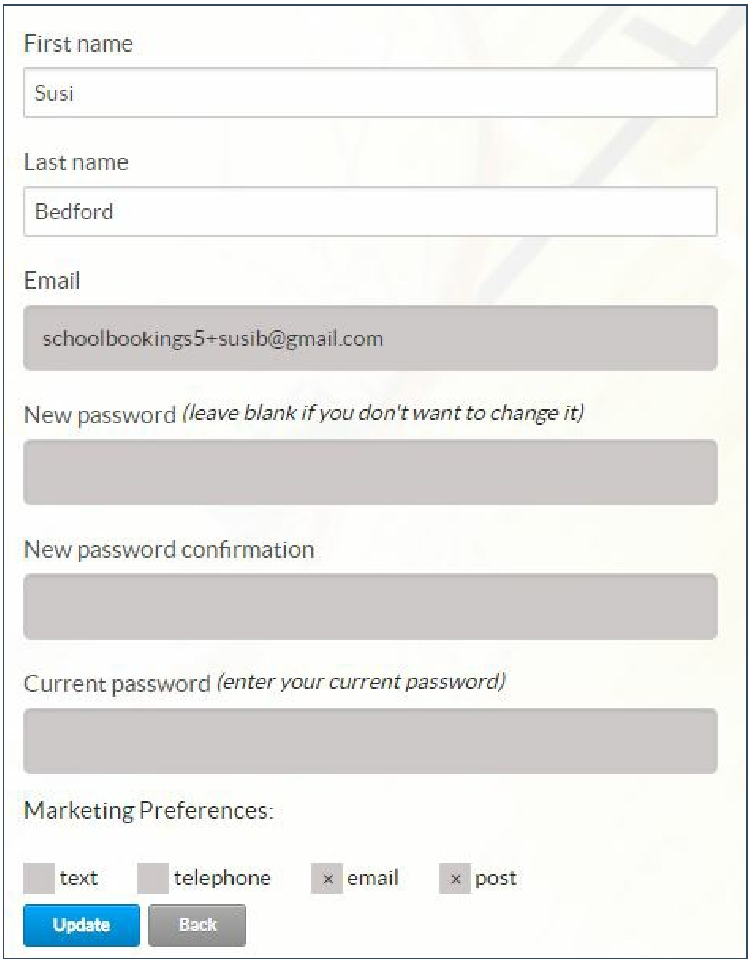


Only once the client has accepted your privacy policy (and terms, if applicable), will they be able to view their bookings & make payments etc.

The client can edit their marketing options, user name, email and password at any time by clicking their name, then Edit Account in the drop down in the top right hand corner of their system login screen.



There they can then tweak their choices, enter their current password and click update.



Please note that this will not change the contact details you hold on their clients account (name, email etc). It will only amend their user login details. This will ensure that all requests for name changes on their client account, come through the venue and that a client cannot just amend their contact details.

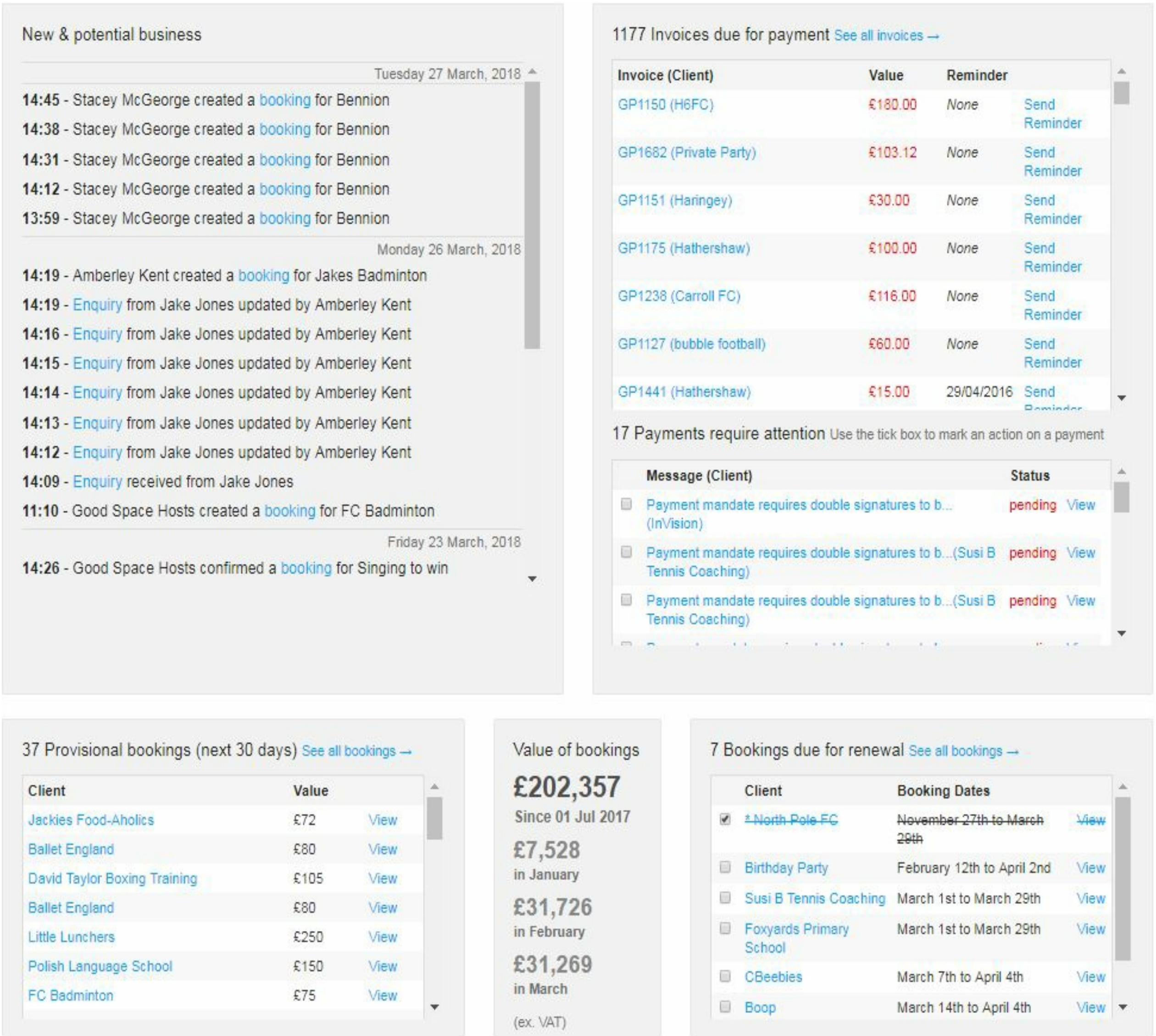
Overview - Dashboard

Last Modified on 11/09/2023 4:02 pm BST

The Dashboard is an excellent management tool within BookingsPlus. It works well for administrators to ensure all aspects of their venue are up-to-date & also provides a high-level view for managers at a glance.

As well as the information on the Dashboard you can also see at a glance whether any new Enquiries have been received, if any Reminders are overdue or if any Invoices are still in the Draft column. This enables you to focus your activity where it is needed.

All items in blue are hyperlinks which will take you directly to the relevant page.



New & Potential Business

- This section gives updates on any bookings which have been created or confirmed (either by your administrators or the client).

- It also shows new enquiries which have been added (either automatically via the website or by an administrator), or enquiries that have been "updated" or "closed".

Invoices

- Any outstanding invoices appear here, allowing you to easily send reminders & manage your debtors.

- **Red** on the "Value" text means an invoice is overdue, i.e. a booking on that invoice has taken place.

- **Yellow** on the "Value" text means an invoice is nearly overdue for payment, i.e. a booking on that invoice is taking place within the next 7 days.

- **Black** on the "Value" text means an invoice has been raised, but no booking dates are occurring within the next 7 days.

- More detailed information is easily accessible by clicking on the blue invoice link.

Payments requiring attention

- Any Payments where the client has ticked that a Double Signatory is required will show here with the status showing as 'Pending'.

- Any Payments that have Failed or have been Cancelled by the client will also show here.

- For any further information on this section take a look at the article Payments requiring attention.

Provisional Bookings

- Provisional Bookings taking place in the next 30 days show up in this section.

- Remember, Provisional Bookings do not appear on Activity/Attendance sheets and cannot be invoiced. This section is to bring them to your attention for action.

- Once the date of a Provisional Booking has lapsed, you'll no longer see it in this section, so be sure to action these ASAP to avoid missing them!

Value of Bookings

- These figures show the total value of Confirmed, Provisional & Cancelled (only those that were not Credited) bookings in the system for a 12 month period.

- The reporting period can be changed to suit your financial reporting period. Please see Amend 'value of bookings' on dashboard for how to amend this.

Bookings due for Renewal

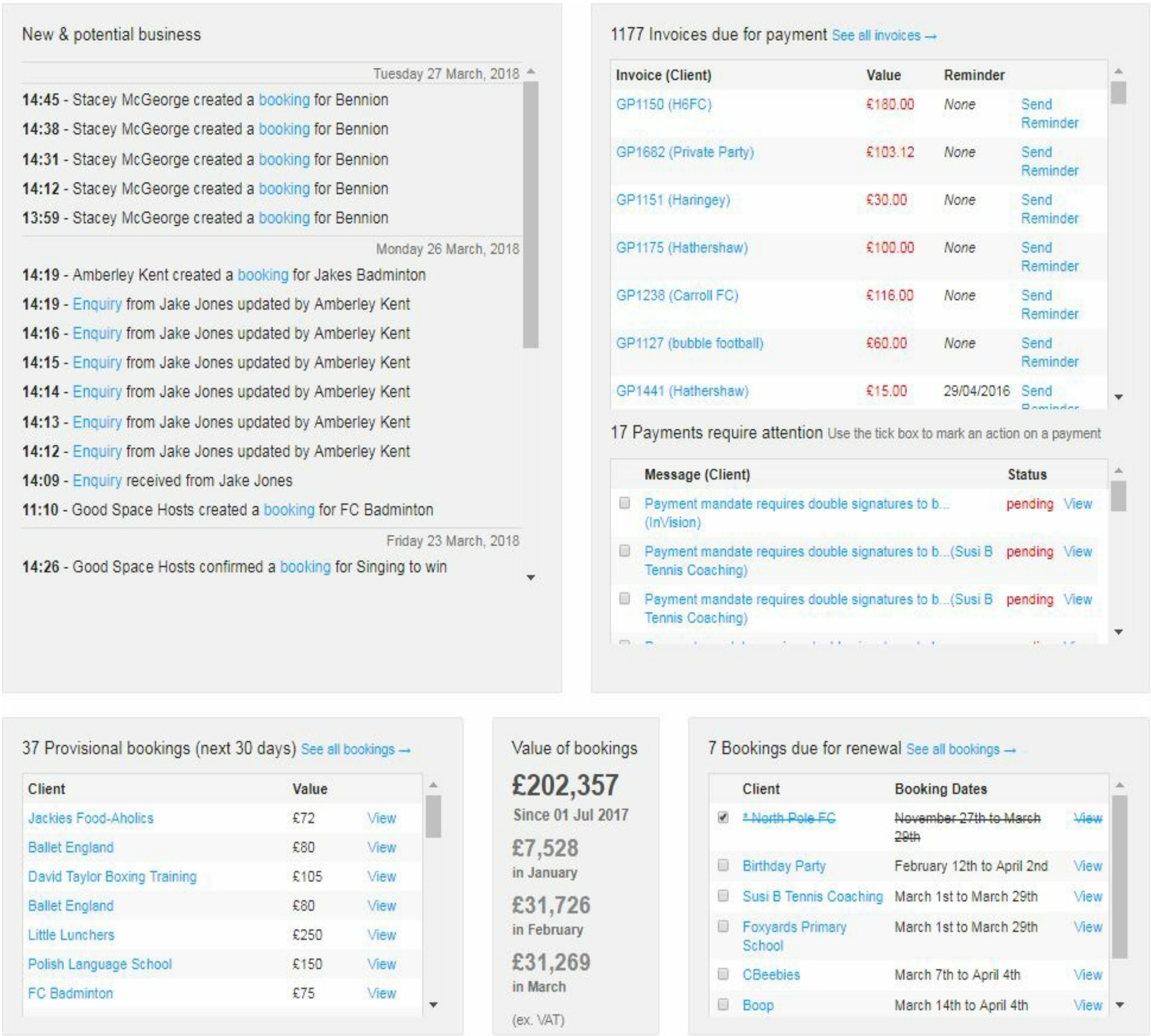
- This section highlights any recurring bookings which are within the last week of their booking, allowing you time to contact the client & rebook their sessions.

- Ideal for those 10 week bookings!

Amend 'Value of bookings' on Dashboard

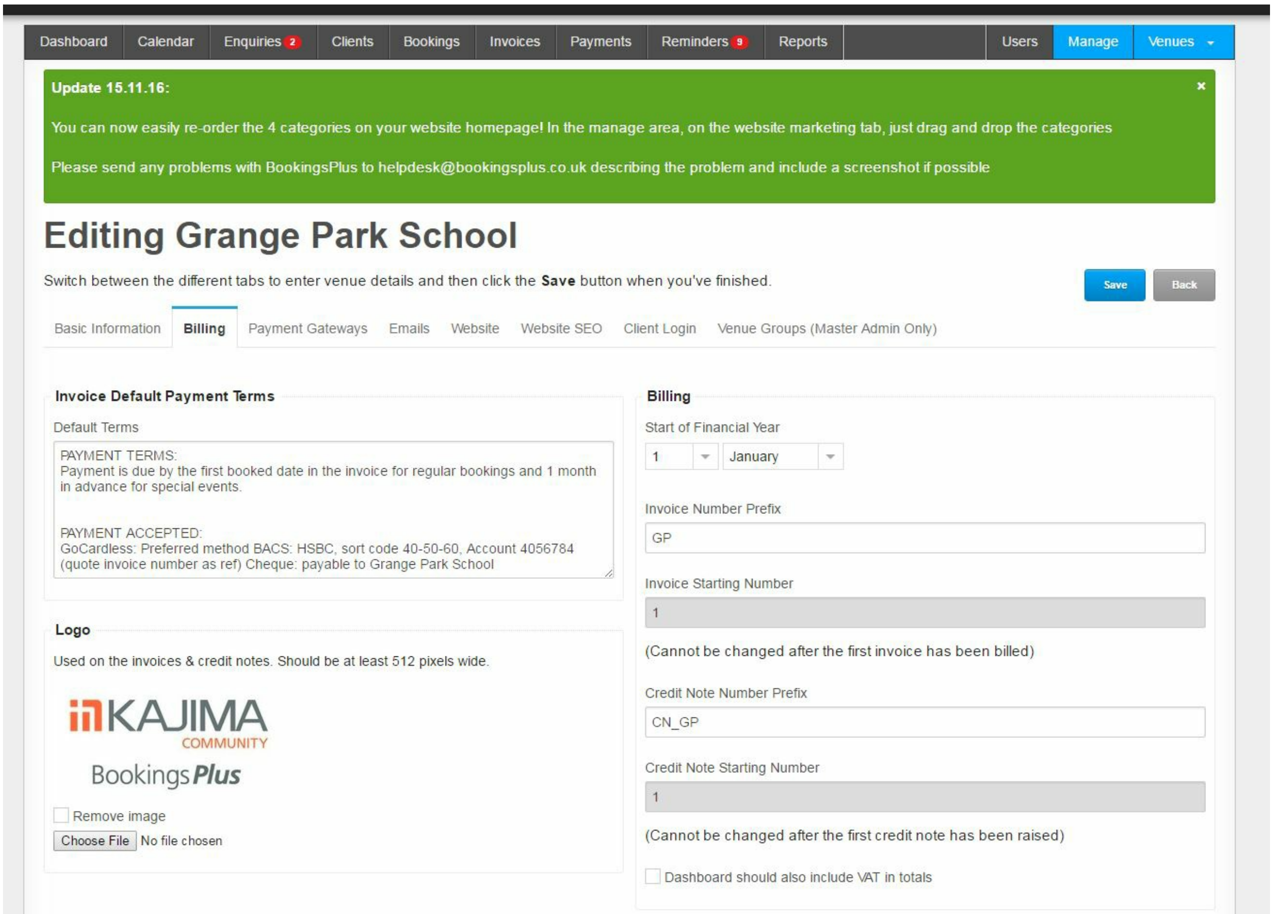
Last Modified on 11/09/2023 4:02 pm BST

Your Dashboard shows a value of the bookings at your venue over a defined 12 month period. It's easy to change this to reflect your reporting periods (i.e. calendar year, academic year, financial year).



To amend this, you'll need to enter the 'Manage' area of your booking system. This is done via the Manage tab on the right hand side of your screen.

From here, click on Edit Venue , then select the Billing tab. Under the **Billing** section, choose the date you require & click Save . This will now be amended for your venue.



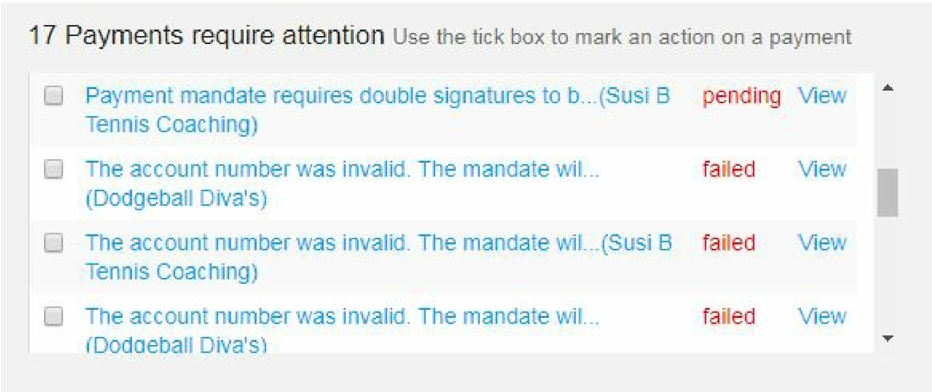
Dashboard
Calendar
Enquiries 2
Clients
Bookings
Invoices
Payments
Reminders 9
Reports
Users
Manage
Venues
Update 15.11.16:
You can now easily re-order the 4 categories on your website homepage! In the manage area, on the website marketing tab, just drag and drop the categories
Please send any problems with BookingsPlus to helpdesk@bookingsplus.co.uk describing the problem and include a screenshot if possible
Editing Grange Park School
Switch between the different tabs to enter venue details and then click the Save button when you've finished.
Save
Back
Basic Information
Billing
Payment Gateways
Emails
Website
Website SEO
Client Login
Venue Groups (Master Admin Only)
Invoice Default Payment Terms
Default Terms
PAYMENT TERMS:
Payment is due by the first booked date in the invoice for regular bookings and 1 month in advance for special events.
PAYMENT ACCEPTED:
GoCardless: Preferred method BACS: HSBC, sort code 40-50-60, Account 4056784 (quote invoice number as ref) Cheque: payable to Grange Park School
Logo
Used on the invoices & credit notes. Should be at least 512 pixels wide.
KAJIMA
COMMUNITY
BookingsPlus
Remove image
Choose File No file chosen
Billing
Start of Financial Year
1
January
Invoice Number Prefix
GP
Invoice Starting Number
1
(Cannot be changed after the first invoice has been billed)
Credit Note Number Prefix
CN_GP
Credit Note Starting Number
1
(Cannot be changed after the first credit note has been raised)
Dashboard should also include VAT in totals

Payments requiring attention

Last Modified on 11/09/2023 4:03 pm BST

Payments Dashboard feature

You are able to easily track payments made through GoCardless or Stripe that have either failed, been cancelled, or require double signatures.



This table works in a very similar way to the 'Bookings due for renewal' feature that is found in the bottom right hand side of the screen, in that you can tick tasks off to remove them once the action has been completed. If you mark a failed or cancelled payment as 'actioned', they will disappear off the list.

Pending payments will not disappear off the list until they turn to 'paid' but will be scored through so you know that you have actioned them. You can also click View to see the payment pop-up for further information.

The actions that need to be completed will depend on the Status; if it is a failed or cancelled payment, you will need to un-allocate the payment from the invoice so that the client is able to remake the payment. Once a payment has failed or been cancelled the client will be notified of this so you will want to make the invoice payable as soon as possible. You may also want to alert the client yourself to ensure they re-make the payment promptly.

'Pending' payments that have been paid out, or 'Failed' payments that have been unallocated, may sometimes still show in this section. These can be updated and removed by using the 

button. This option shows after you select the view link.

If the status is Pending and the message mentions 'double signatures' then the client will have ticked a box when making the payment to state that more than one person is required to authorise this payment. The payment will remain pending until the client fills in a form that GoCardless will have emailed over to them. In this instance you will want to get in touch with the client to ensure this form has been received, filled out and sent back. You can then tick the item on the dashboard - it will stay but it is a good way to show that the client has been contacted with regards to that payment.

If the client has not received this form, has any questions, or ticked the box in error, you can sign into your GoCardless dashboard and choose to resend the double signatory email, or cancel the relevant payment.

If you are still experiencing issues, you/your client will need to contact GoCardless to resolve this. GoCardless can be contacted at 020 8338 9538, help@gocardless.com.

NOTE: Only payments (that require attention) made since the 1st January 2018 are displayed on the dashboard.

Overview - Calendar

Last Modified on 18/02/2022 3:31 pm GMT

The Calendar is a day-at-a-time view within BookingsPlus. It is colour coded for bookings & payments, providing an easy to analyse visual guide to that evening's activities.

A key to the colours/icons used in the page is at the top for reference.

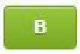
Down the left hand side are all the bookable spaces for your school. The default calendar view is to 'View booked rooms only'. Uncheck this box to view all rooms available.

If Calendar Categories have been allocated to Bookable Spaces in the Venue Management setup, the category drop down box will allow the user to view the relevant spaces. This way availability for facilities which are suitable for a particular activity can be checked at a glance. By selecting dance/drama this would only show those rooms that would potentially be suitable e.g. dance studio, drama studio, main hall, sports hall, gymnasium.

Find out more about Calendar Categories

You can either make an Enquiry or a Booking directly from the calendar. To do this, simply click on the calendar for the required room. It will default to a 1 hr booking as shown. 

You can then extend this booking time either way if required. To make an enquiry, click 

for a booking, click 

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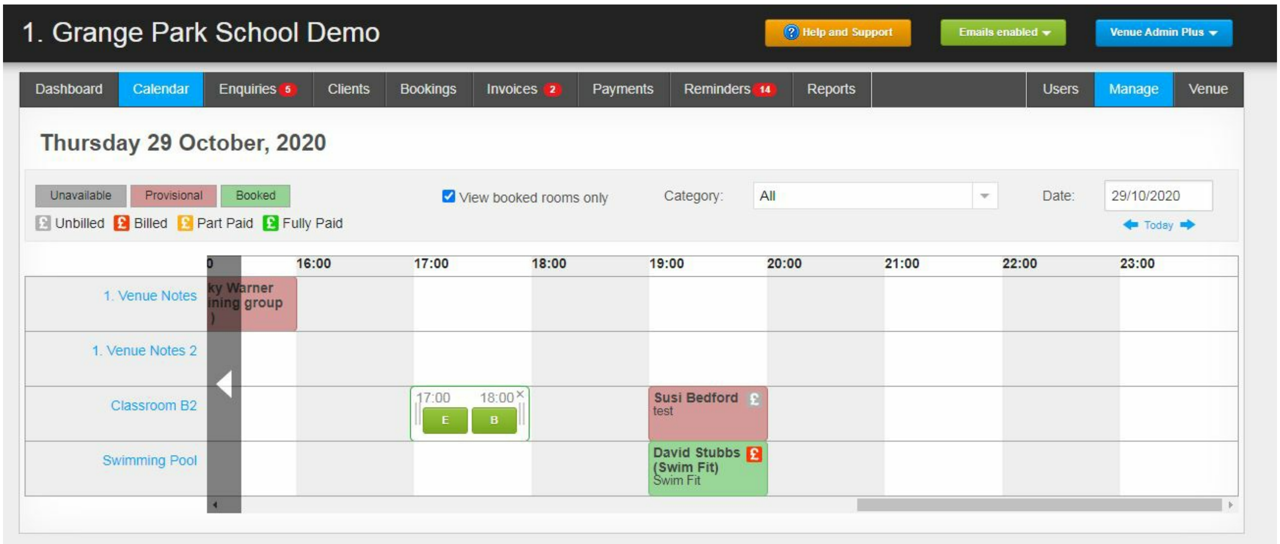
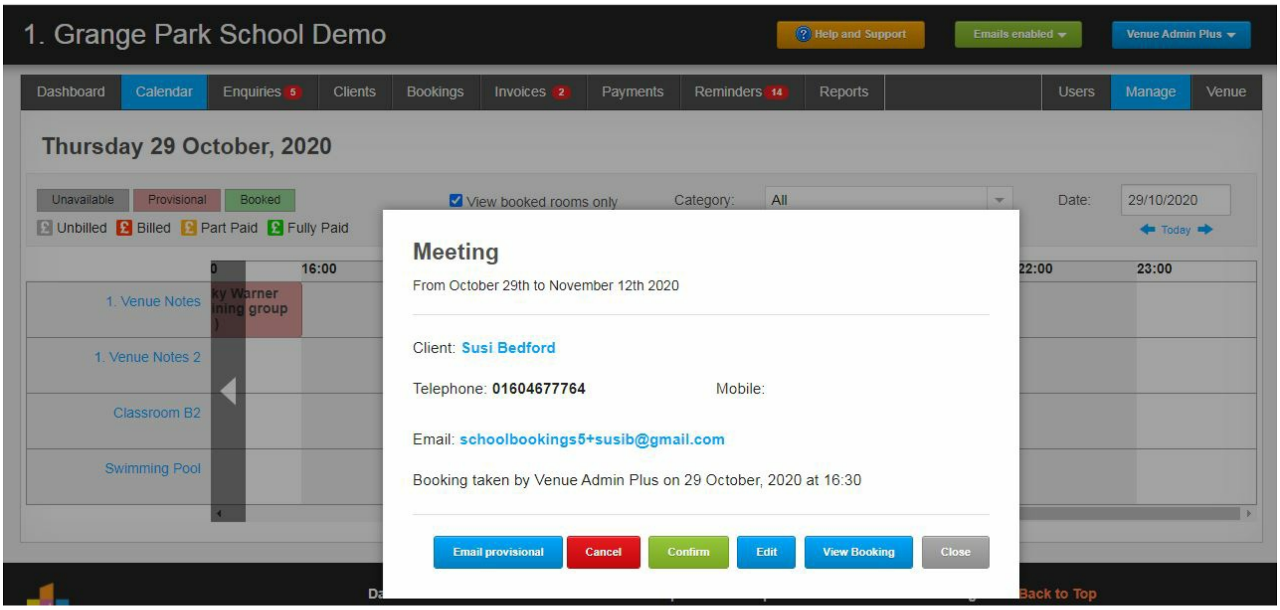
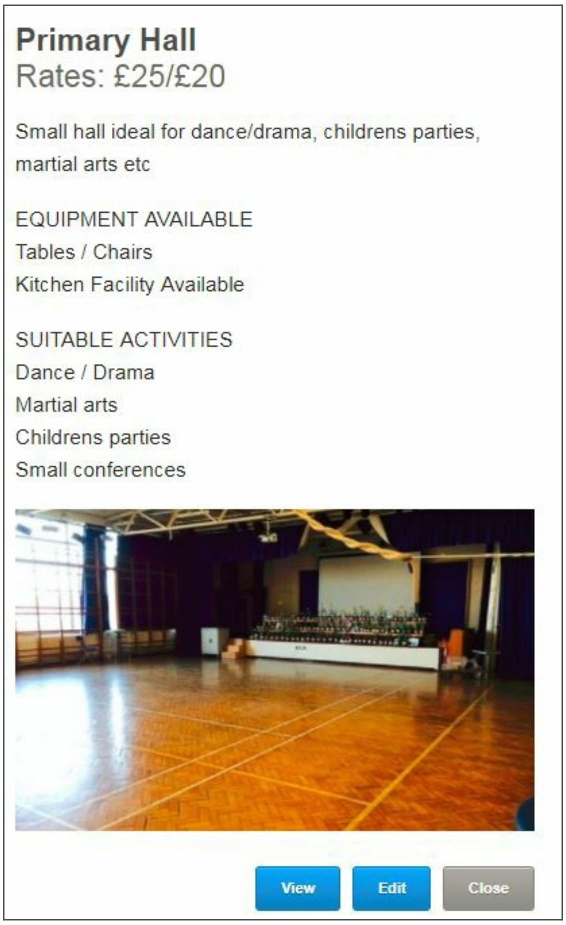


Click on any calendar booking to find out more....



You can also view further information on the rooms down the left hand side of the calendar by clicking the blue room's name. A pop up will appear. You can store useful information here about the Standard and Concessionary hourly pricing, a description of the space (such as available equipment and suitable activities) and also photographs of the space. This information is for administrator use only. If any changes are required, simply click on the 'Edit' button at the bottom.



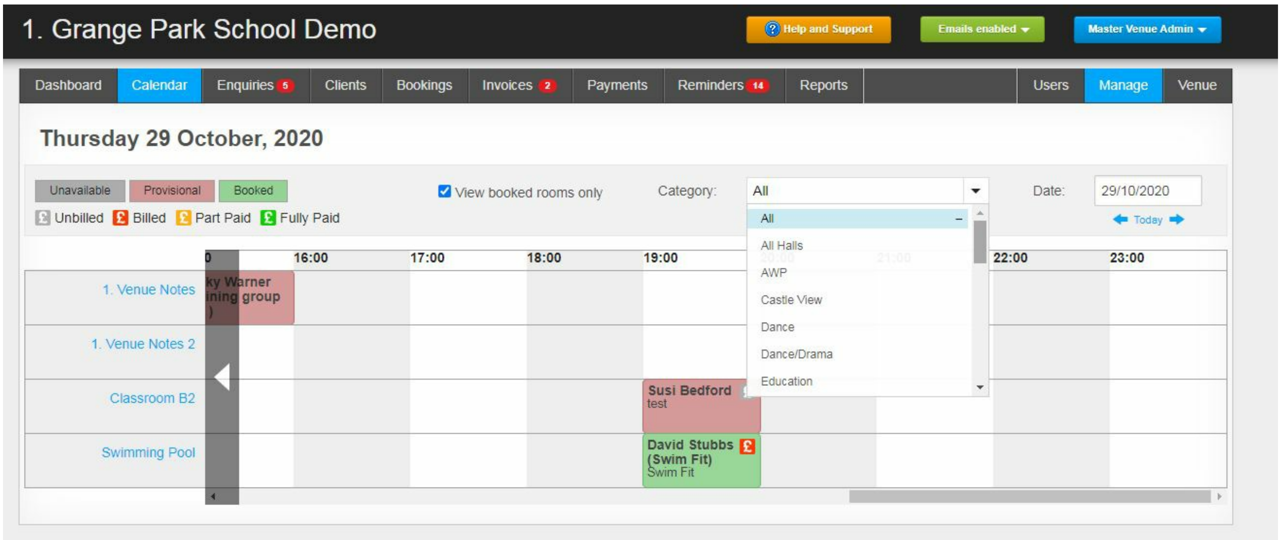
Alternatively you can also make any amendments to the information showing here from the [Venue Management] tab. Under the Bookable Spaces, select the space that you would like to tweak & click on 'Edit'.

Setting up calendar categories

Last Modified on 18/02/2022 3:34 pm GMT

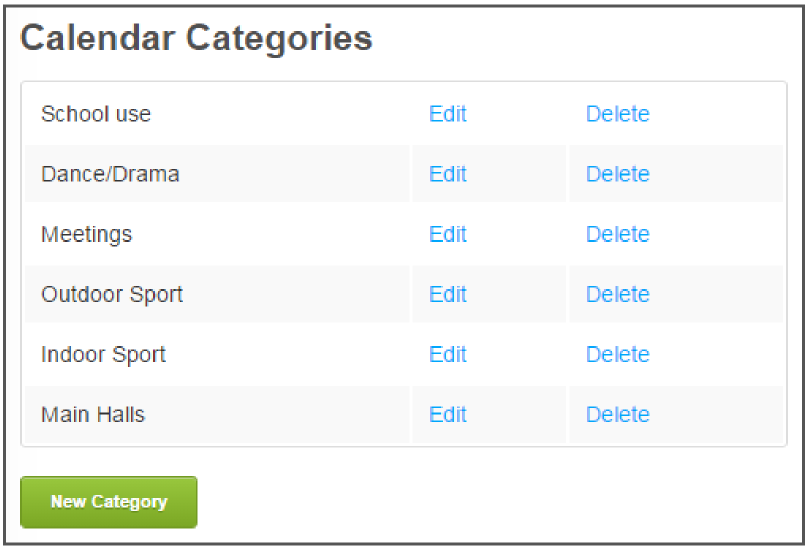
Within the Calendar view of BookingsPlus there is the option to narrow your view to rooms which are suitable for a certain purpose ie. indoor sports (sports hall/gym), dance/drama (drama studio/dance/gym/hall) etc.

These can be fully customised to your venue, we will have set-up suggestions initially, but we do recommend that you check that they are fitting for you.



To amend this, you'll need to enter the 'Manage' area of your booking system. This is done via the Manage tab.

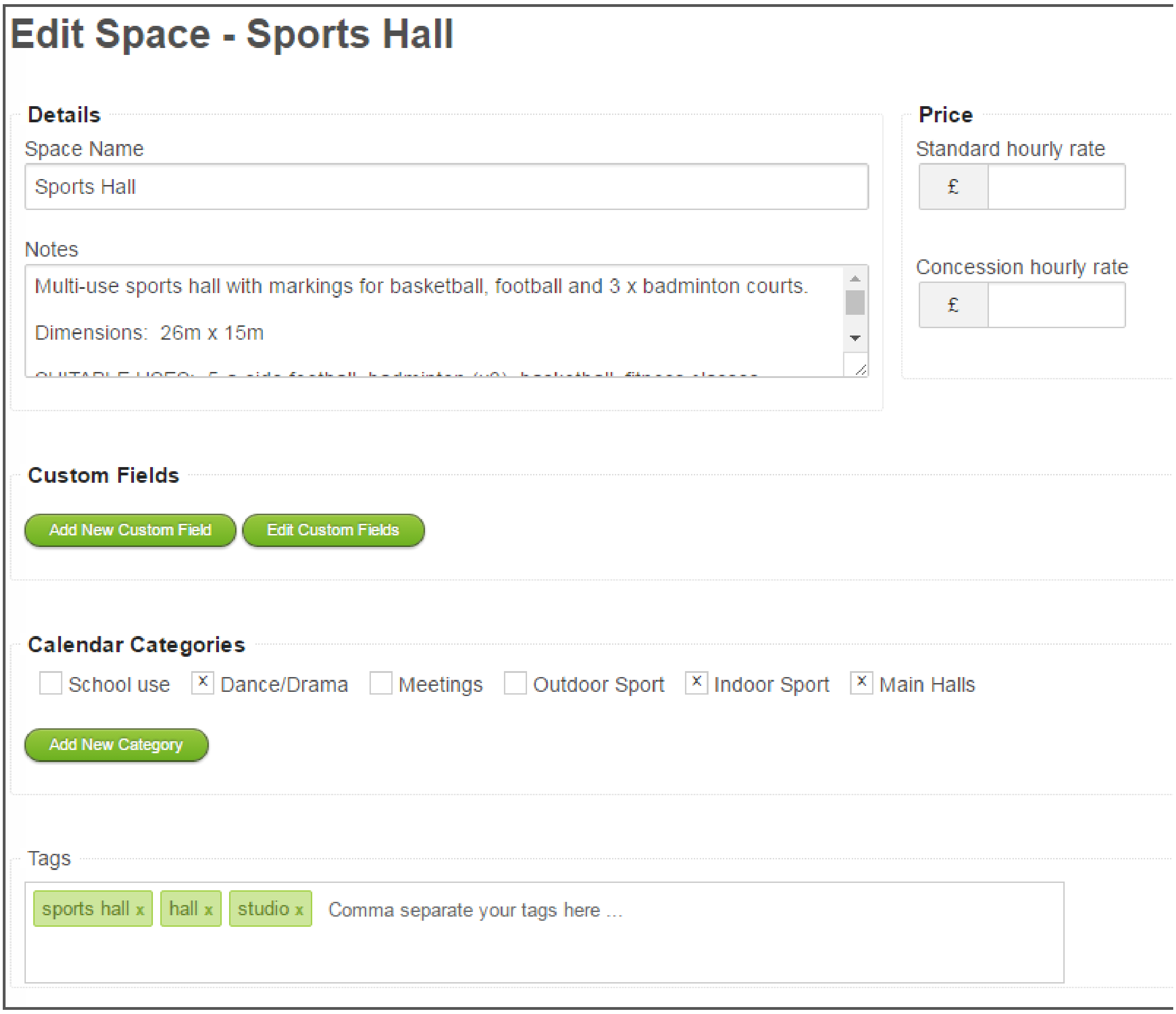
On the [**Venue Management**] tab, you will see the following section:



Click the 

and complete the pop-up box.

You now need to select the various rooms which can fall under this category. This is done from the [**Venue Management**] tab. Under the **Bookable Spaces,** select the relevant space & click on '**Edit**'



Under the **Calendar Categories** section, click the new category you've set up & click 

Personalise default times on calendar

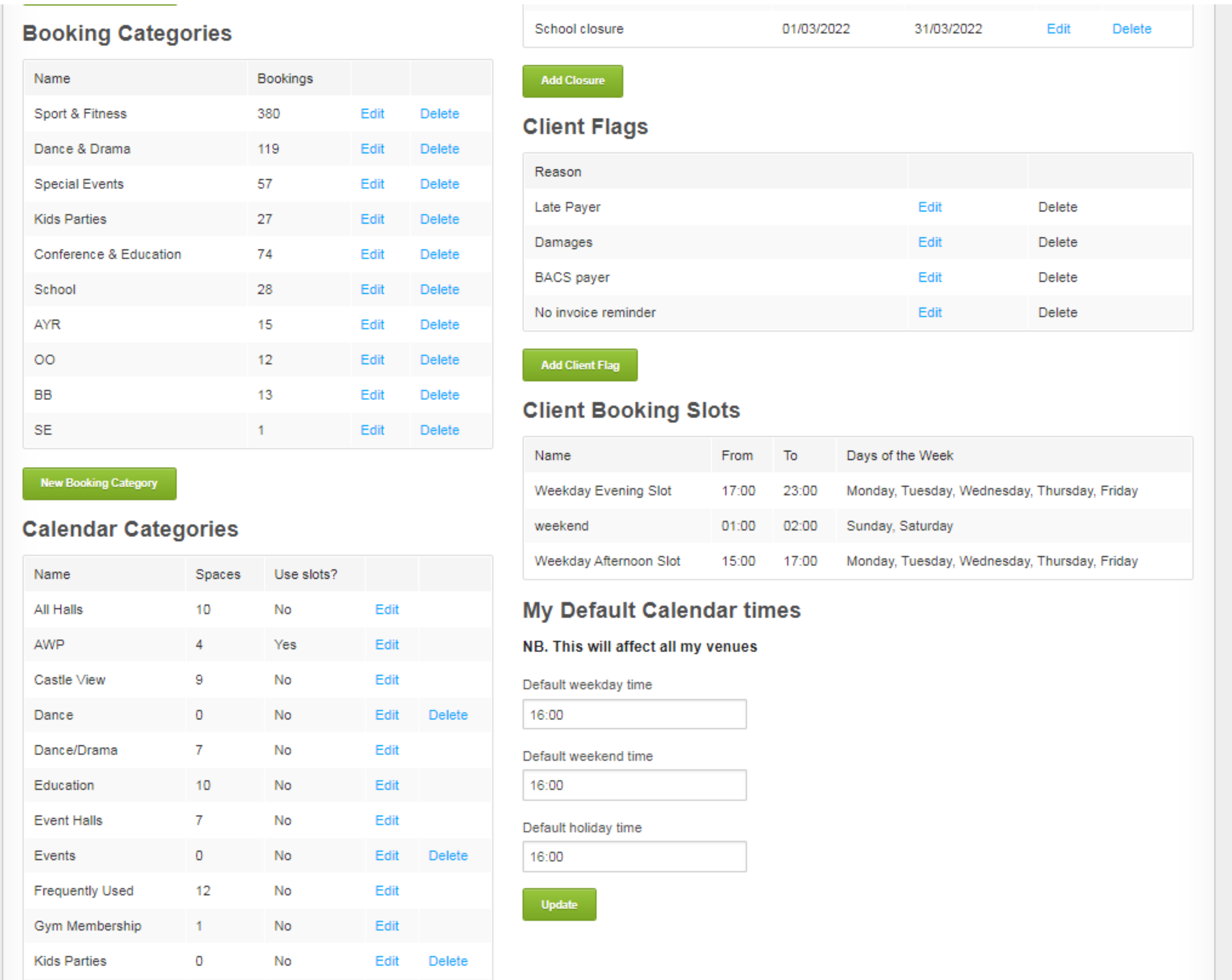
Last Modified on 18/02/2022 3:34 pm GMT

Within BookingsPlus you are able to amend the Calendar view to suit your venue's opening hours.

This will be for your view only for the venues you have access to. It will not affect other users.

To amend this, you'll need to enter the 'Manage' area of your booking system. This is done via the [Manage] tab.

In the My Default Calendar times section, select the times you require & click 

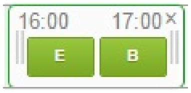


Add a New Enquiry

Last Modified on 11/09/2023 1:26 pm BST

BookingsPlus is ideal for storing all your enquiries in one place. This gives you easy access for any follow-up, as well as giving you the option to convert the enquiry to a booking.

Administrators can manually add an enquiry, either from the [**Calendar**] tab or [**Enquiries**] tab.

To add from [**Calendar**], simply click on the relevant space & select the time. This can be dragged to extend the times if required. Select "E" 

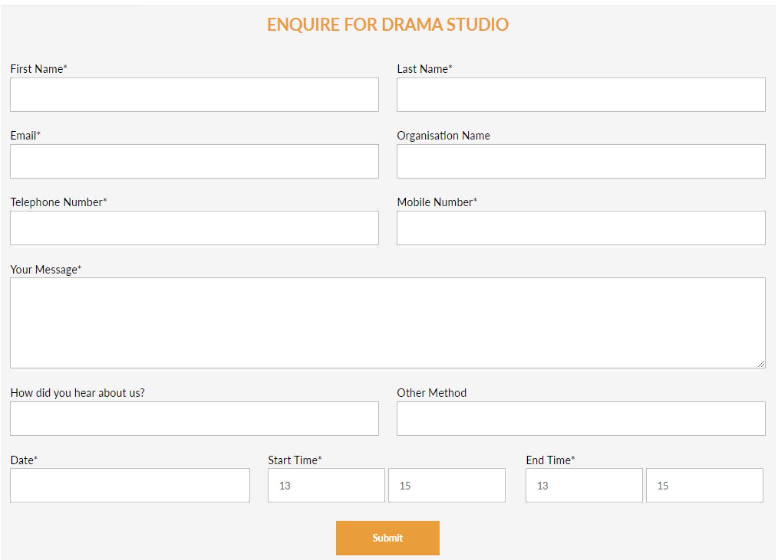
and it will open a new Enquiry form.

One advantage of adding from the [**Calendar**] is that both the date and time selected will be pulled across into your new enquiry form!

To add from the [**Enquiries**] tab, click on the tab and then select 

at the top of the page.

Once your website is live and active, clients can submit an enquiry directly to your system.



ENQUIRE FOR DRAMA STUDIO

First Name*
Last Name*
Email*
Organisation Name
Telephone Number*
Mobile Number*
Your Message*
How did you hear about us?
Other Method
Date*
Start Time* 13 15
End Time* 13 15
Submit

Once you receive and open this enquiry, you'll be able to see both the contact details they have populated, but also where they have enquired from on your site, and the date/time they are enquiring for.

Please see The Enquiry form for full guidance on enquiries.

The Enquiry form

Last Modified on 11/09/2023 1:40 pm BST

BookingsPlus is ideal for storing all your enquiries in one place. This gives you easy access for any follow-up, as well as giving you the option to convert the enquiry to a booking.

An enquiry can either be added from the [**Calendar**] tab or [**Enquiries**] tab as an Admin. See Add a New Enquiry. They are also received directly from potential clients through your website.

Once the enquiry form is open, you can follow instructions below.

- **Contact Details** - Fill in as many contact details as you can obtain. ***TIP*** You will need an email address to make a booking.

    - You may receive an enquiry from an existing client. You can use the "Clients" dropdown to select their account, which will automatically populate their contact details.

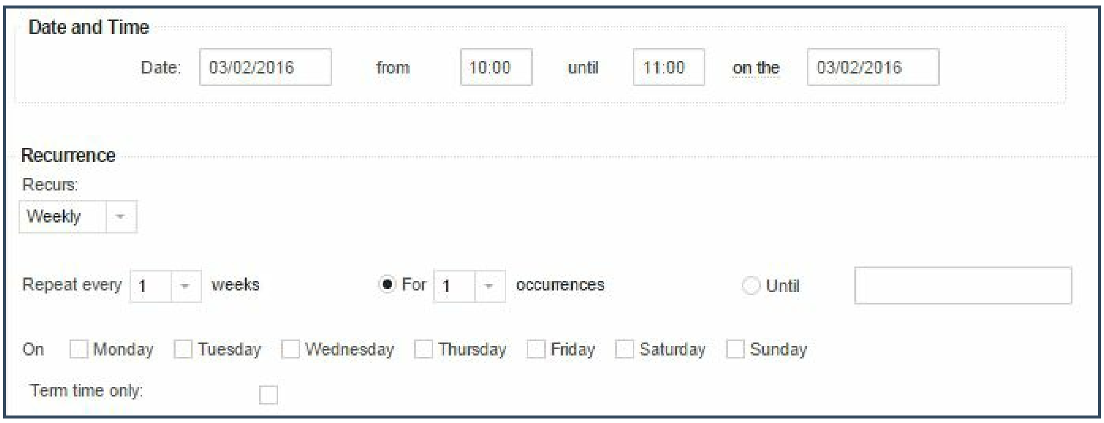
- **Enquiry Query** - Select the bookable space required & choose pricing option. VAT will default to zero - amend as required.

    - To add additional spaces, click on 

as many times as required.

- **Date and Time** - choose the Date & Time of first booking ensuring the correct time format HH:MM is used. Only populate the 'on the' date with a different date to the first date if the booking goes over midnight.

- **Recurrence** - To recur a booking, click on the drop down box & select options required.



- **Term Time Only** - this is driven from the holiday dates within the 'Manage' area of your system. Ensure these are kept up to date.

Now click 

- **Enquiry Details** - the results of your enquiry will be shown within the table. Lines in **green** are available, lines in **red** are either booked or the venue is closed. Find out more in our Checking an availability on an Enquiry.

- **Enquiry Notes** -

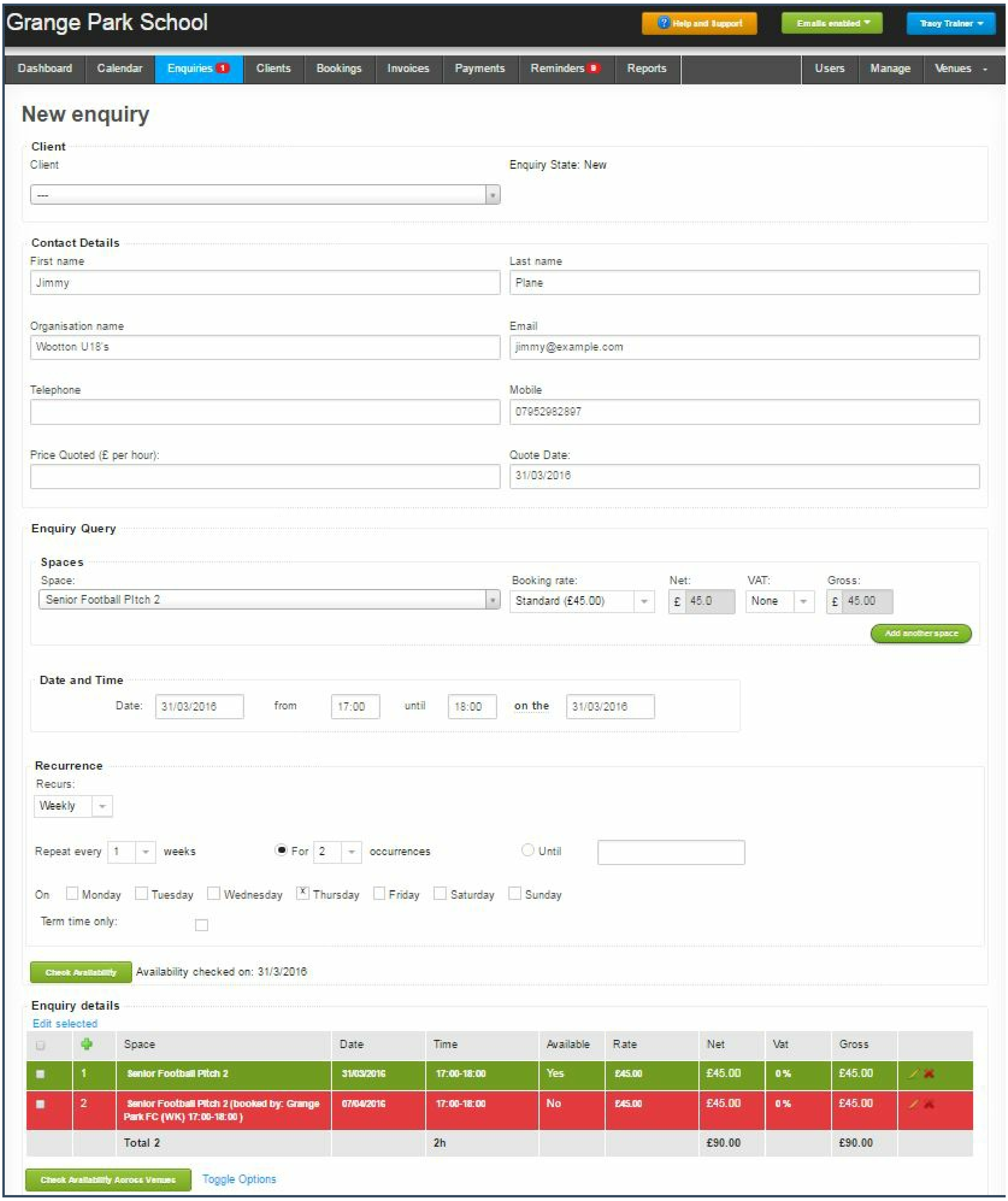
- Referrer - try to capture this information to assist feedback on your marketing.

- Message - if your enquiry came through the website, this will be the section they filled in. If on the phone, just add a brief summary of the request.

- Notes - this space is for you to add any relevant information regarding the enquiry, i.e. for an event: how many people, any entertainment, alcohol being served, what times allowed for clearing away etc. ***TIP*** Put your initials/date before any comments to help create an audit trail (eg FF 04/09/2020)

- **Follow Up** - Optional reminder section.

Select 


Grange Park School
Help and Support
Emails enabled
Tracy Trainer
Dashboard
Calendar
Enquiries 1
Clients
Bookings
Invoices
Payments
Reminders
Reports
Users
Manage
Venues
New enquiry
Client
Client
Enquiry State: New
Contact Details
First name
Jimmy
Last name
Plane
Organisation name
Wootton U18's
Email
jimmy@example.com
Telephone
Mobile
07952982897
Price Quoted (£ per hour):
Quote Date:
31/03/2016
Enquiry Query
Spaces
Space:
Senior Football Pitch 2
Booking rate:
Standard (£45.00)
Net:
£ 45.0
VAT:
None
Gross:
£ 45.00
Add another space
Date and Time
Date: 31/03/2016 from 17:00 until 18:00 on the 31/03/2016
Recurrence
Recurs:
Weekly
Repeat every 1 weeks
For 2 occurrences
Until
On Monday Tuesday Wednesday Thursday Friday Saturday Sunday
Term time only:
Check Availability
Availability checked on: 31/3/2016
Enquiry details
Edit selected
Space Date Time Available Rate Net Vat Gross
1 Senior Football Pitch 2 31/03/2016 17:00-18:00 Yes £45.00 £45.00 0 % £45.00
2 Senior Football Pitch 2 (booked by: Grange Park FC (WK) 17:00-18:00) 07/04/2016 17:00-18:00 No £45.00 £45.00 0 % £45.00
Total 2 2h £90.00 £90.00
Check Availability Across Venues
Toggle Options

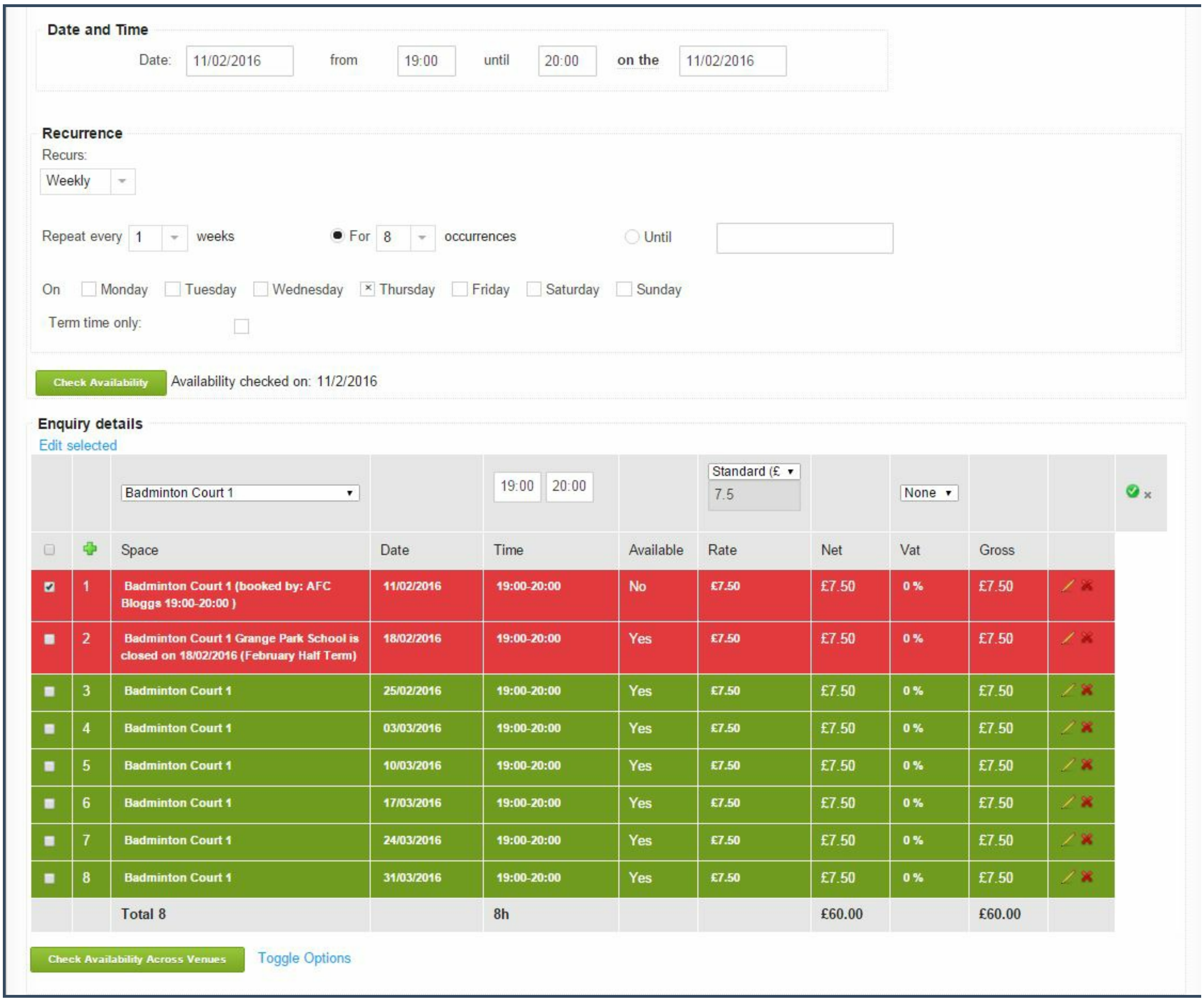
Checking availability on an Enquiry

Last Modified on 11/09/2023 1:51 pm BST

An enquiry can be received via your website, or added manually by the administrator, and is listed on the **Enquiries** tab.

Once you've added your enquiry to BookingsPlus, you can get a clear idea of the availability of your chosen sessions. Click on Toggle details half way down the form on the right, and then enter the space/dates/times you would like to check, and add any recurrence required. Click Check Availability.

The **Enquiry details** table will show the results of your search. Lines in **green** are available, lines in **red** are either booked or the venue is closed.



	Space	Date	Time	Available	Rate	Net	Vat	Gross
1	Badminton Court 1 (booked by: AFC Bloggs 19:00-20:00)	11/02/2016	19:00-20:00	No	£7.50	£7.50	0 %	£7.50
2	Badminton Court 1 Grange Park School is closed on 18/02/2016 (February Half Term)	18/02/2016	19:00-20:00	Yes	£7.50	£7.50	0 %	£7.50
3	Badminton Court 1	25/02/2016	19:00-20:00	Yes	£7.50	£7.50	0 %	£7.50
4	Badminton Court 1	03/03/2016	19:00-20:00	Yes	£7.50	£7.50	0 %	£7.50
5	Badminton Court 1	10/03/2016	19:00-20:00	Yes	£7.50	£7.50	0 %	£7.50
6	Badminton Court 1	17/03/2016	19:00-20:00	Yes	£7.50	£7.50	0 %	£7.50
7	Badminton Court 1	24/03/2016	19:00-20:00	Yes	£7.50	£7.50	0 %	£7.50
8	Badminton Court 1	31/03/2016	19:00-20:00	Yes	£7.50	£7.50	0 %	£7.50
	Total 8		8h			£60.00		£60.00

It's easy to amend the results. In the example above, 2 sessions were unavailable for different reasons.

- Item 1 - Booked by another hirer.

Why not see if you can offer an alternative court that day? To do this select the pencil icon , amend the details in the drop down options and . The results of the new search will appear in the table, if it is unavailable it will be **red** and you can repeat the process.

- Item 2 - Venue Closed.

In this scenario, it's likely you would just cancel that weeks booking. To do this, click on the red cross  and the session will be deleted.

If you need to edit multiple lines at once, you can use the check boxes on the left to choose the relevant dates, then use the 

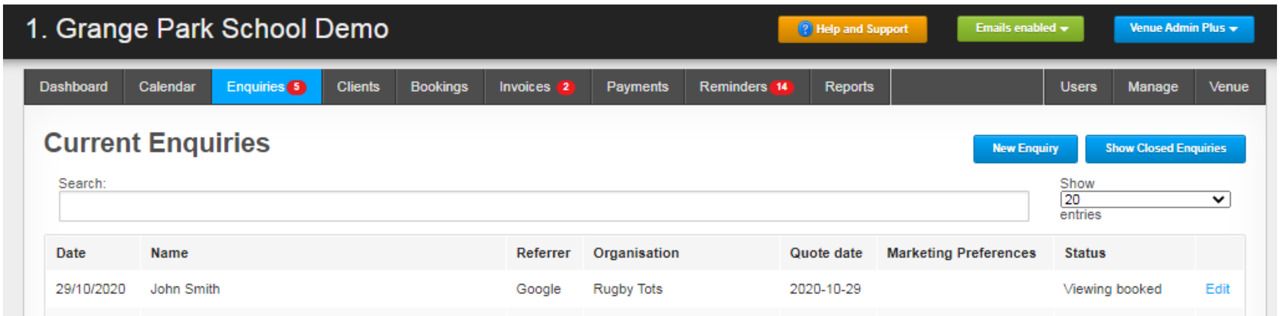
to toggle editing a series of lines together!

Convert to Booking

Last Modified on 11/09/2023 2:02 pm BST

Great news that your potential hirer is now ready to make a booking! It's time to convert the enquiry.

Click on [**Enquiries**] tab. From the list, select the enquiry and click Edit.



This will open up the enquiry you've been dealing with. There will now be additional options at the bottom of the enquiry.

This will convert all the existing information onto the Booking Form.

This will close the enquiry. Ensure the notes section is updated prior to closing, and please note that "Closed" enquiries cannot amended or re-opened (you can still view these to see past notes).

Use this function for any booking which you cannot take, e.g. if the function is too large for the facilities, the booking is for a time that your venue is closed etc. Using this will help with future analysis on enquiries.

Before you can Covert the Enquiry to a Booking, you'll first need to add them as a Client. You can use the 

button to open a New Client page, with any contact details you had entered into the enquiry pulled through. Save that Client and you'll return to the enquiry form ready to convert the booking.

Select 

and follow the 'Make a Provisional Booking' article.

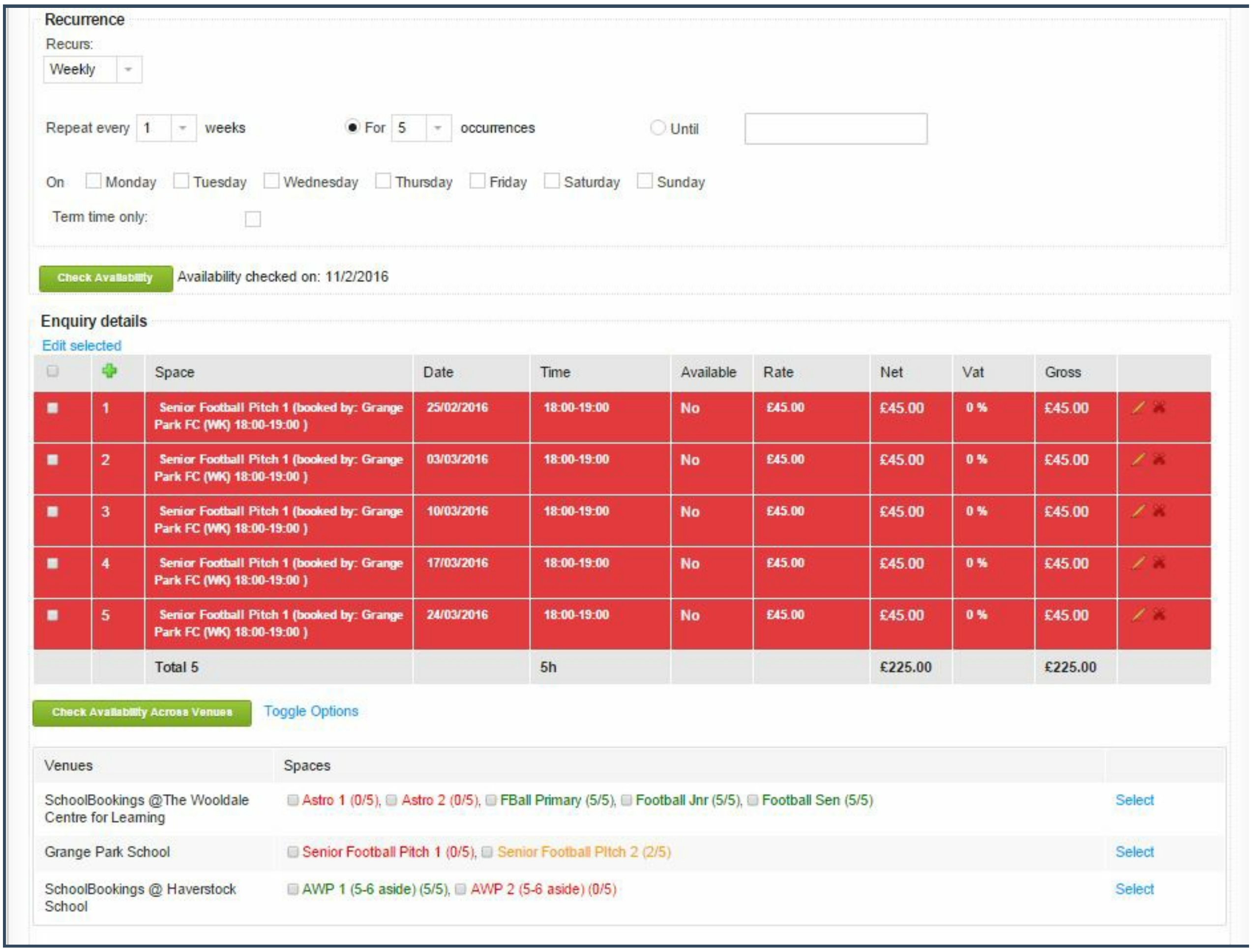
Check Availability Across Venues

Last Modified on 11/09/2023 2:34 pm BST

Within BookingsPlus there is the option to check availability across venues you're assigned to.

This is particularly useful when managing more than one venue that's nearby, and a particular room is unavailable at Venue A.

After you've Checked availability on your Enquiry, click on **Check Availability Across Venues** to check any of your other venues who's spaces share the same Room Tags.



The table at the bottom will show all the venues which you have permission to view.

If a space is **Green**, it means it is available for the duration of your enquiry.

Orange is partly available, and you can see how many occurrences are available from the number in brackets.

Red is not available for any of the possible occurrences in that space.

If you wish to move to another venue, simply click to select the space required, then Select . This will open up an enquiry/booking in the venue you have chosen and you will be able to proceed from there.

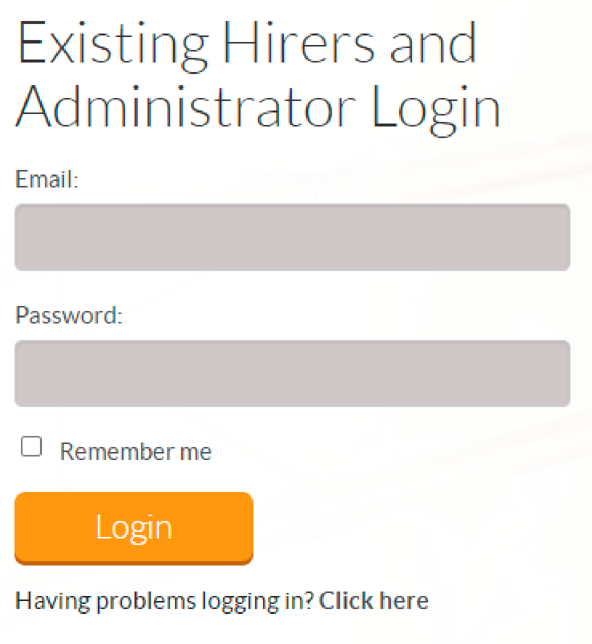
Can't find a suitable space? Try the Toggle Options link where you can view and select from any of your bookable spaces across venues you have permission to access, regardless of the Room Tag.

What a hirer's account looks like

Last Modified on 11/09/2023 4:04 pm BST

Hirers log onto BookingsPlus via my.schoolbookings.co.uk

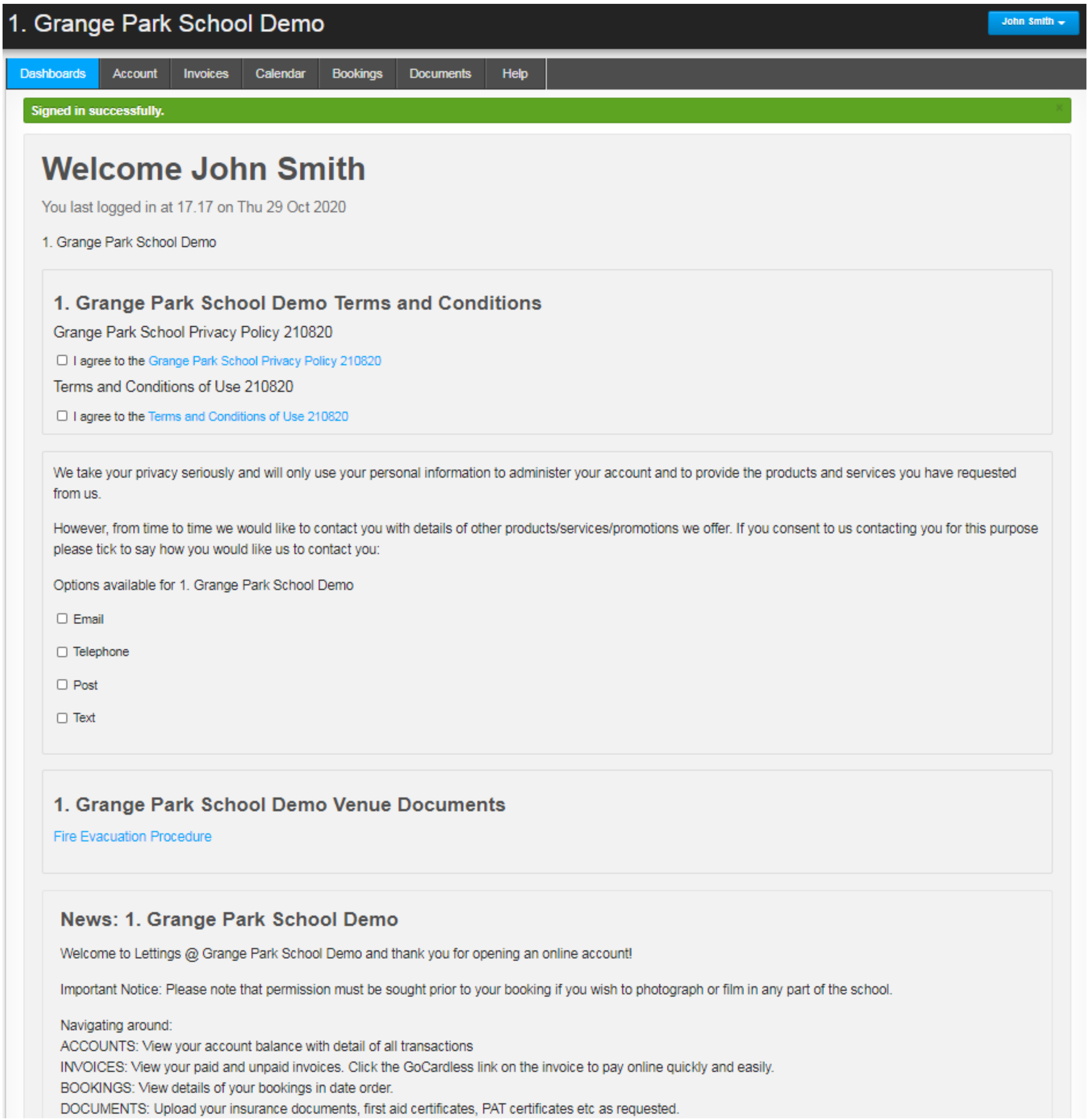
They enter their email address & the password they received in their Welcome Email on this screen:



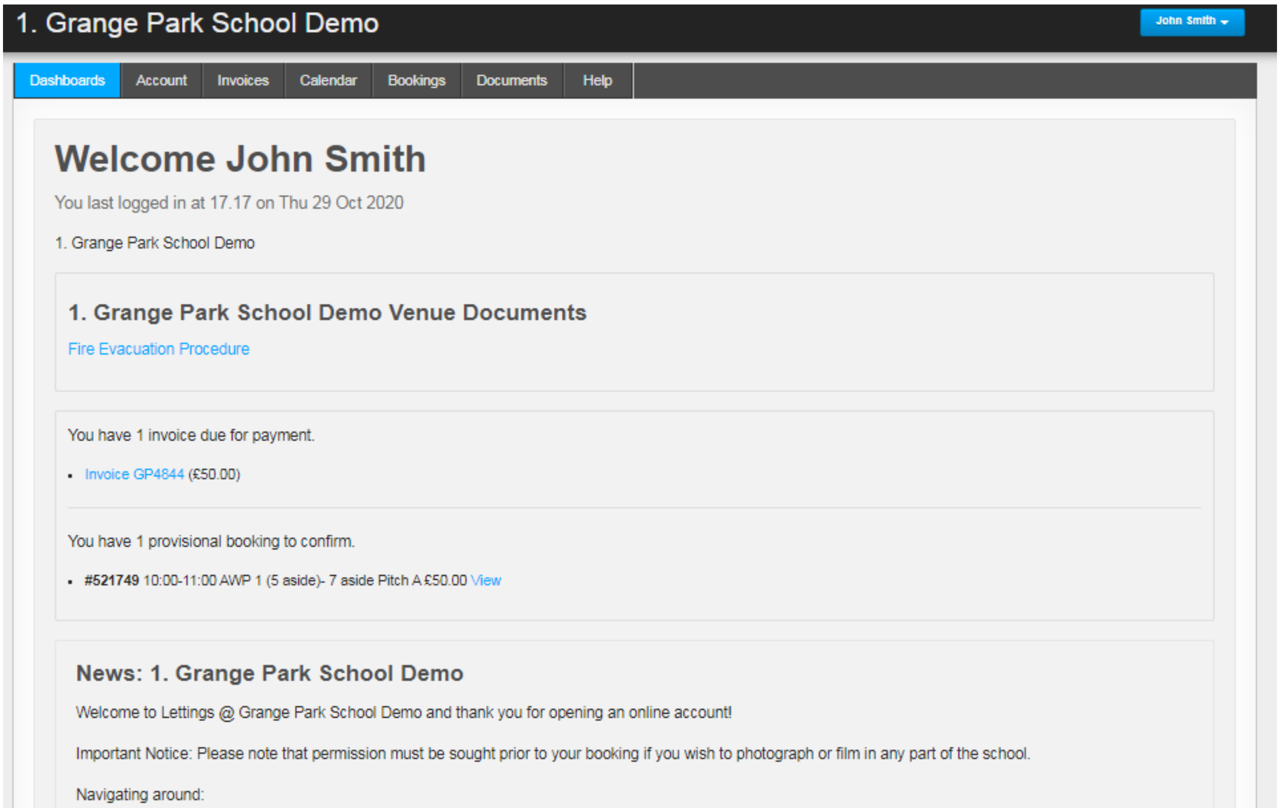
The screenshot below shows the information they can view. The tabs follow a similar format & functionality as the Administrator view.

All clients must accept the T&C's and Privacy Policy before they are allowed to access their account detail. Once accepted this will update immediately on their Client Account in the clients tab. If the Client would like to re-read the Terms and Conditions they are available at the top of the Account tab.

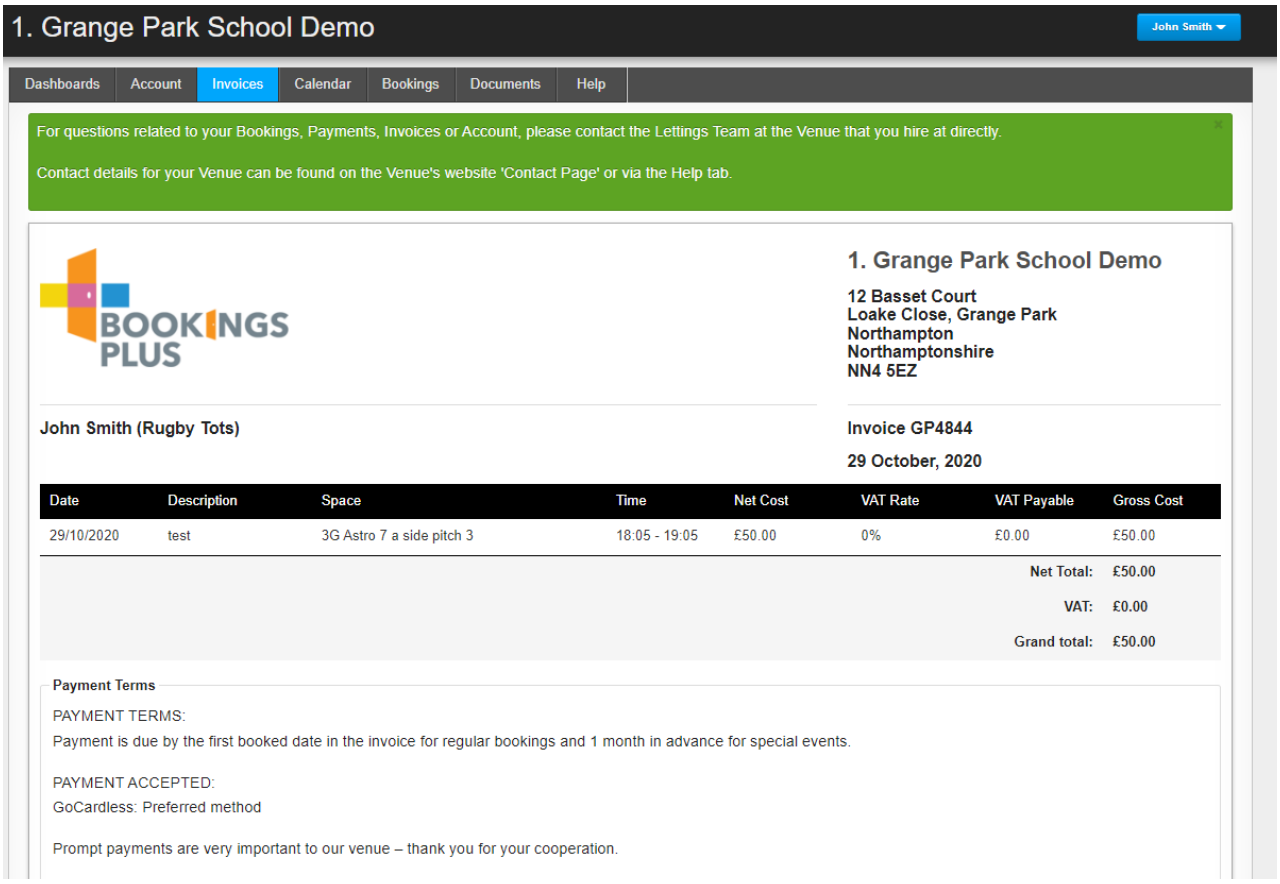
They will also be able to select which marketing options they would prefer when they first log in, this will also then show on their Client Account. If they would like to then amend these in the future, they can do so from the top right drop-down menu displaying their name then selecting the 'Edit Account' option.



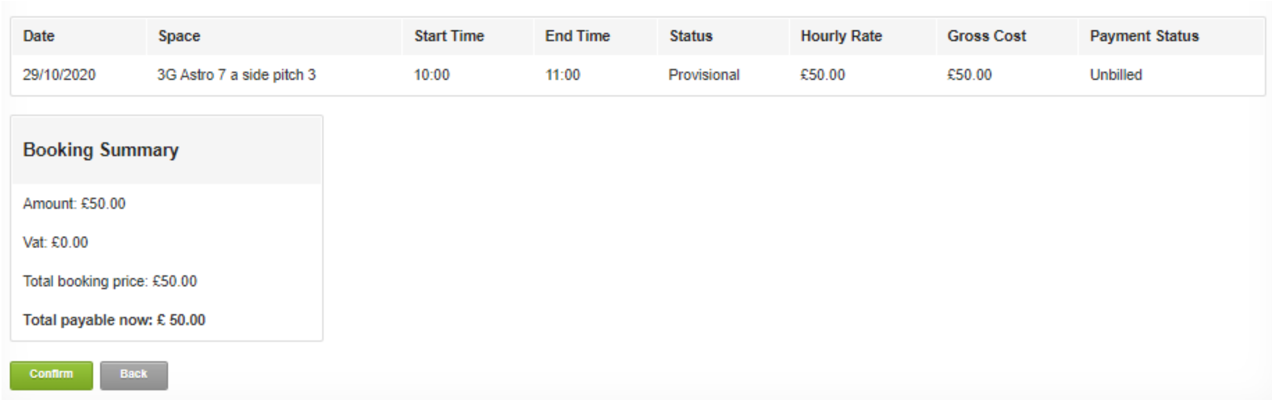
When clients access their Dashboard in the future it will draw their attention to any actions which require their attention e.g. invoices due for payment & provisional bookings.



Clicking on the blue Invoice hyperlink will bring up a preview of the client's invoice:



Clients can preview their bookings via the 'Bookings' tab and confirm any provisional bookings by clicking the blue 'View' hyperlink from their Dashboard and clicking the green 'Confirm' button at the bottom of the page:



Date	Space	Start Time	End Time	Status	Hourly Rate	Gross Cost	Payment Status
29/10/2020	3G Astro 7 a side pitch 3	10:00	11:00	Provisional	£50.00	£50.00	Unbilled

Booking Summary

Amount: £50.00

Vat: £0.00

Total booking price: £50.00

Total payable now: £ 50.00

Confirm Back

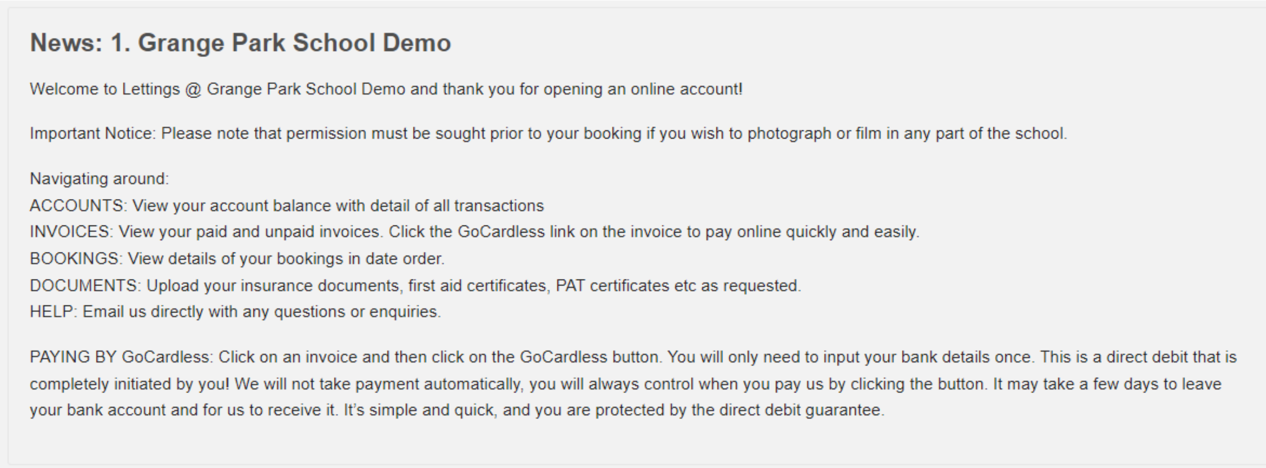
If the client has any queries on their bookings or invoices the Help tab in the Client Account will point them to your venue's contact email address, this is the one entered into your venue's Contact Details section during your venue setup.

Message for Paying Clients

Last Modified on 11/09/2023 4:05 pm BST

BookingsPlus provides a variety of areas where you can provide information relevant to their hiring your venue.

Each time your clients sign in, they'll be able to view a message from the venue on their Dashboard:



News: 1. Grange Park School Demo

Welcome to Lettings @ Grange Park School Demo and thank you for opening an online account!

Important Notice: Please note that permission must be sought prior to your booking if you wish to photograph or film in any part of the school.

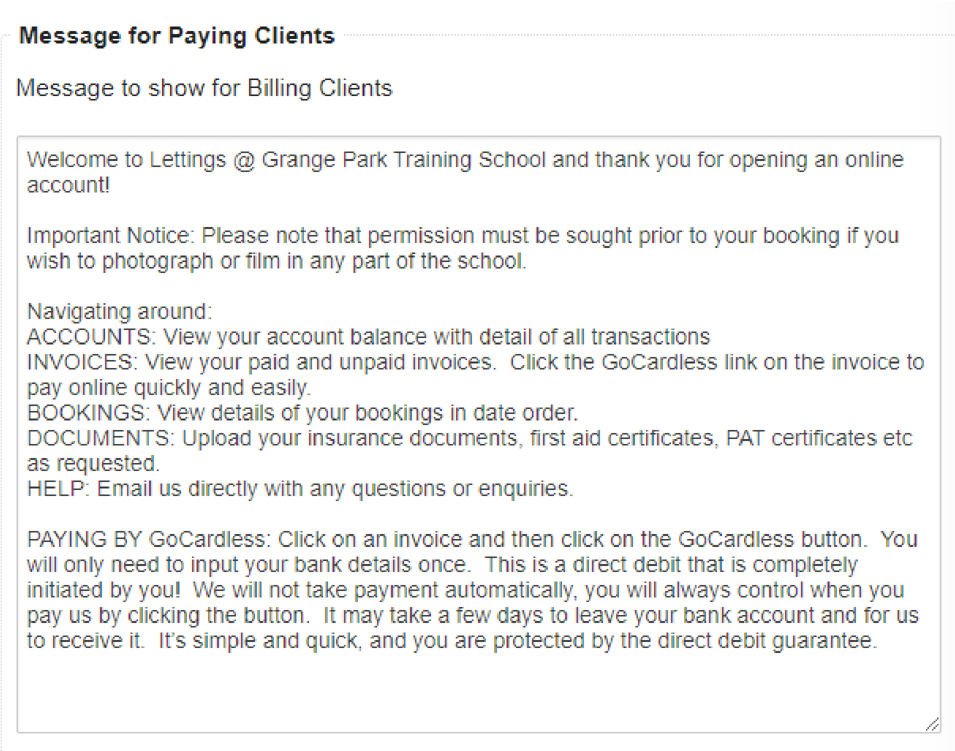
Navigating around:
ACCOUNTS: View your account balance with detail of all transactions
INVOICES: View your paid and unpaid invoices. Click the GoCardless link on the invoice to pay online quickly and easily.
BOOKINGS: View details of your bookings in date order.
DOCUMENTS: Upload your insurance documents, first aid certificates, PAT certificates etc as requested.
HELP: Email us directly with any questions or enquiries.

PAYING BY GoCardless: Click on an invoice and then click on the GoCardless button. You will only need to input your bank details once. This is a direct debit that is completely initiated by you! We will not take payment automatically, you will always control when you pay us by clicking the button. It may take a few days to leave your bank account and for us to receive it. It's simple and quick, and you are protected by the direct debit guarantee.

There's lots of ways you can use this to help guide your clients, from giving instructions in how to navigate their account, what they need to know about attending bookings at your venue, documents they should provide, and much more.

This message can be set from your '**Manage**' tab by selecting Edit Venue , then opening the sub tab Client Login .

Here you can find the "Message for Paying Clients" section, where you can input your message:



Once you've entered your message, be sure to select the  button before exiting the page. This will update for all of your clients at the venue.

TIP This section can be used to enter hyperlinks for PDF and Cloud based documents, great if you have lots of external resources you'd like hirers to be able to access. Ask our team to discuss how this might work best for you: ***support@bookingsplus.co.uk***

Welcome Emails

Last Modified on 12/09/2023 9:43 am BST

A New Client User can be set-up directly from a Client Account.

To manually generate a new Client User Login, click on New Client User , fill in the form, and save. If you've entered contact details for the Client Account and there are no Users already set-up, when you select this button it will pull the relevant details into form for you.

This will automatically send out the Welcome Email. You can add several Client User Logins so more than one person can have access to the account, which is useful where the bill payer is different from the person booking.

Alternatively, your hirers automatically receive a Welcome Email once you send them any correspondence from the system. This could be:

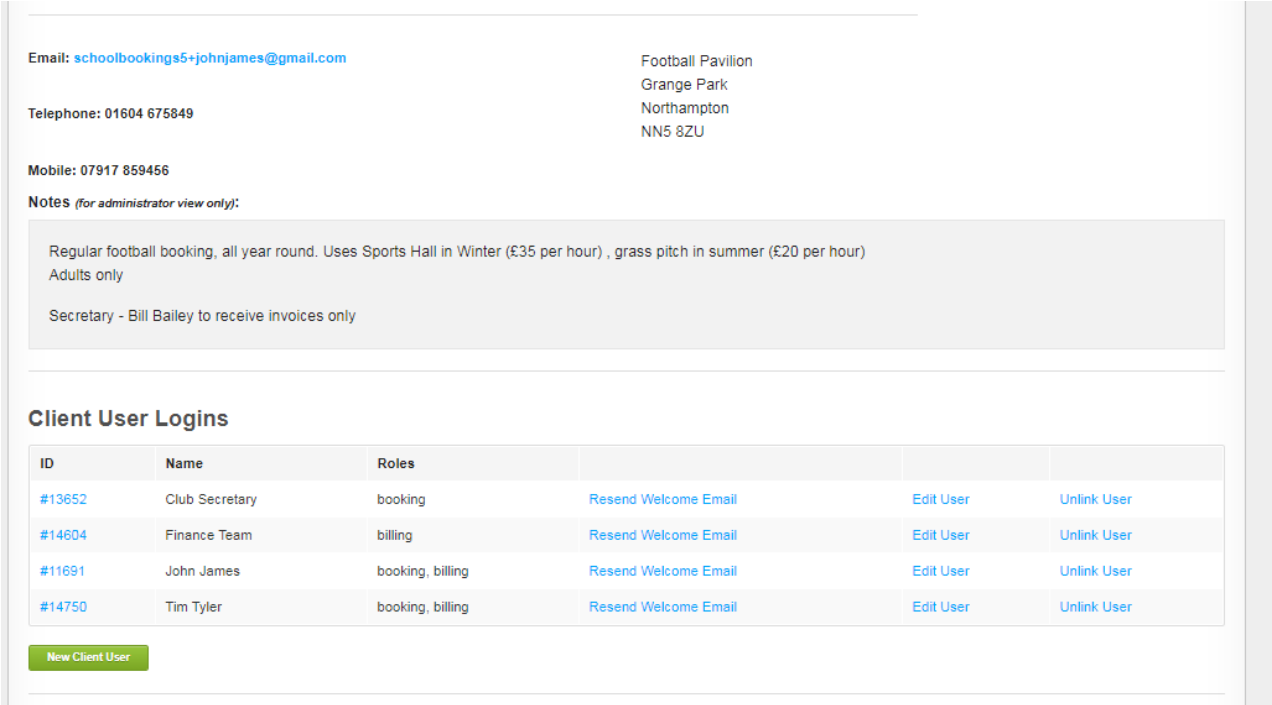
- A provisional booking email
- Confirmed booking email
- Invoice awaiting payment email

Their Welcome Email will have their log-in details for BookingsPlus (wording can be amended to suit your venue in the Manage tab - Edit Venue - Emails sub-tab).

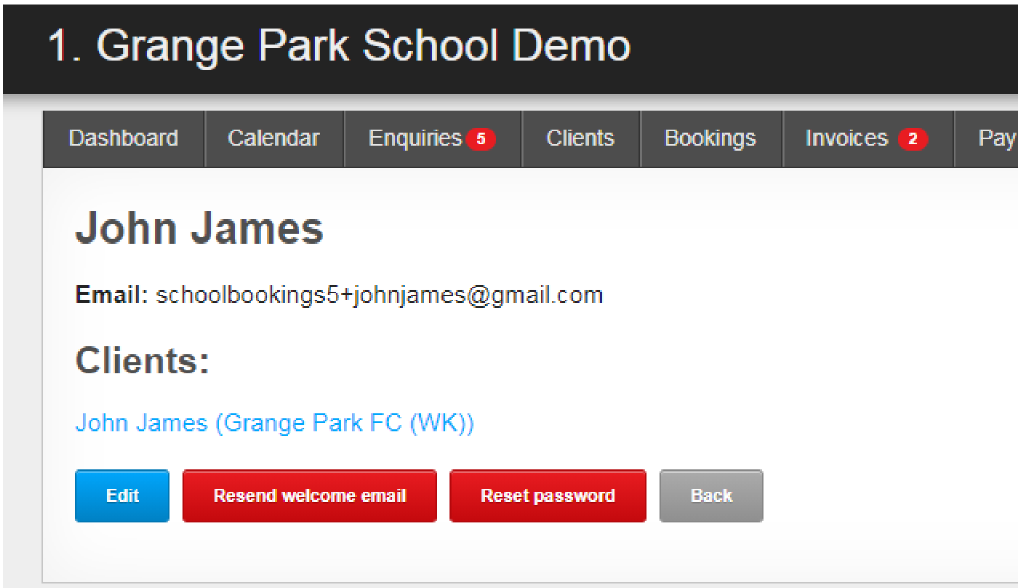
To check if a Welcome Email has been sent:

- Select the **Clients** tab, search your client and click **View.**

- In the **Client User Logins** section, a blue hyperlinked User ID will show if a login has been created.



If a client forgets their password, you can send them a new password by using the Reset password option. Just select the Blue ID hyperlink to see this option, and check which email that is being sent to:



If your client hasn't received their Welcome Email yet, you can always choose to Resend welcome email instead.

Please see an example of a Welcome Email below.

Welcome to Kajima Community Inbox x

1. Grange Park School Demo <noreply@email.schoolbookings.co.uk>
to John

Dear John James,

Welcome to Kajima Community.Please login to your account to view our terms and conditions.

Please click this link to login to our website:
https://my.schoolbookings.co.uk/users/sign_in

You may login with your email address and the following password:
BBFwdVKp

Kind Regards

The Kajima Community Team at Grange Park School
schoolbookings5@gmail.com
www.test.schoolbookings.co.uk
03330 110476
Follow us on Facebook: **like us on Facebook**

*** **Please do NOT reply to this email address, it is not monitored. Please contact the venue that you hire facilities at** ***

Hirer not receiving emails

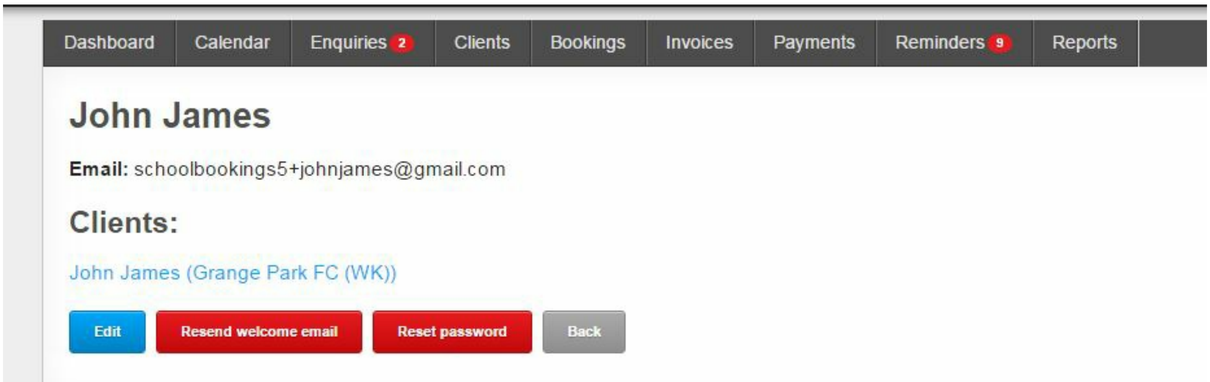
Last Modified on 12/09/2023 9:52 am BST

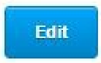
If your hirer isn't receiving BookingsPlus emails, follow our troubleshooting guide to identify the issue:

STEP 1 - Check their email address is correct on their User ID

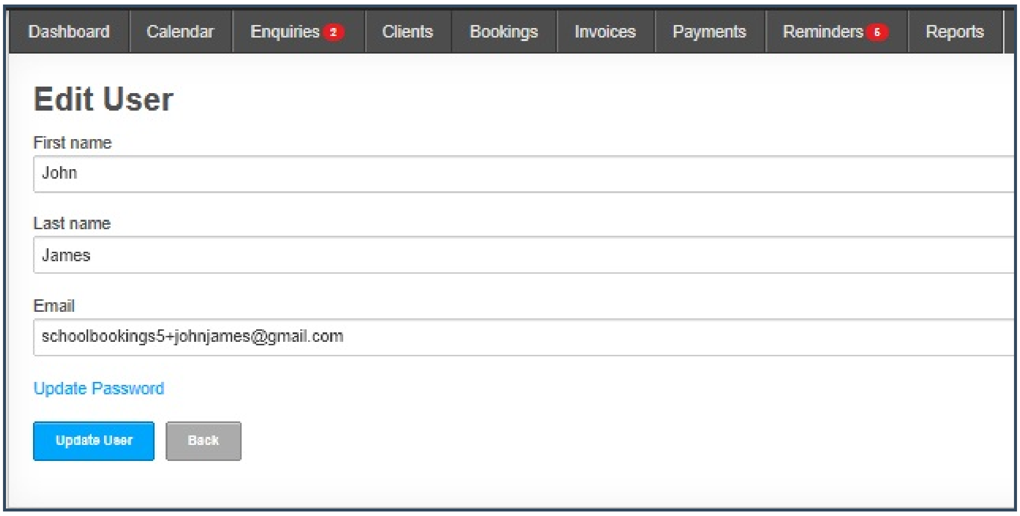
- Select the **Clients** tab, search and **View** your client

- Click the ID hyperlink within the Client User Logins section and check the email address is correct:

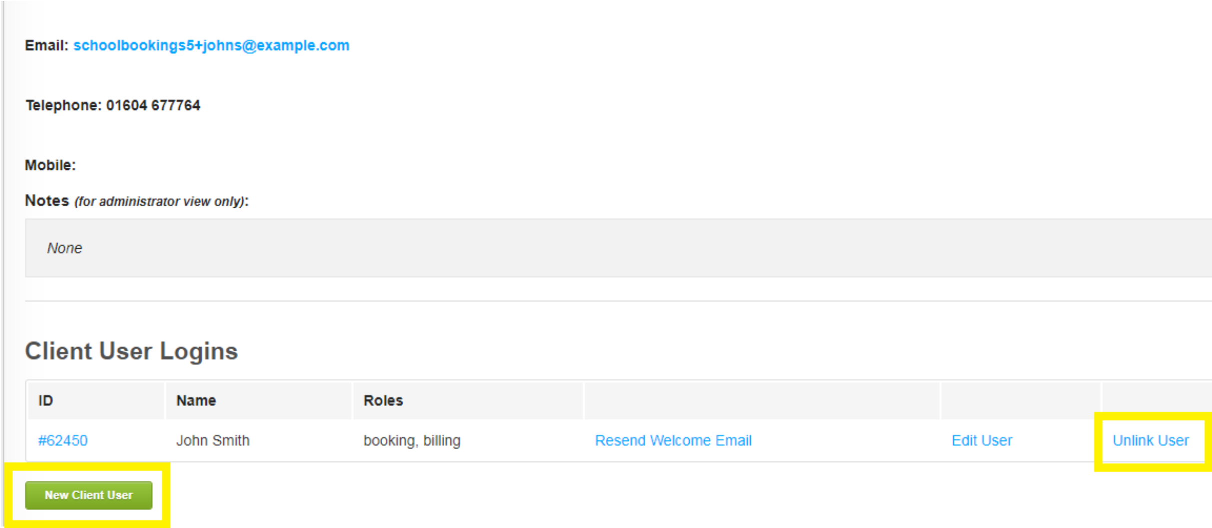


- If changes are required, click on 

and make required changes



If the email is not correctly updating, this may be because it is also linked to another venue within BookingsPlus. In this case go back to the **Clients** tab, click **View** and in the **Client User Logins** section click to **Unlink** the client. Once Unlinked, you can Click on **New Client User** to add a New User to the client with the correct email address.



STEP 2 - Check the email address is valid. There are several websites which you can use (eg mailtester.com)

STEP 3 - Ask them to check their Spam/Junk folders as messages do occasionally find their way in there!

STEP 4 - Emails may sometimes be blocked by firewalls (common with company/organisation email addresses). Ask the hirer to log-on at home using their own PC, or perhaps using a smartphone or tablet. Alternatively, ask the hirer if they have an alternative email address they can use.

STEP 5 - If none of the above work, the Master Venue Admin can manually set a password for them. Either tell them over the phone or by email what it is & see whether they can log-on and subsequently receive emails. This can be done on the **Users** or from their client page (see above steps to access) tab. Please note the Welcome Email is sent from a different email address to all the other automated emails.

STEP 6 - If, after all the above, it's still not working then contact us at the Helpdesk (**01604 677764** or email **support@bookingsplus.co.uk**). We are able to track the automated emails sent from BookingsPlus & will be able to see whether they are actually reaching your hirer. We are happy to talk to your hirer directly & talk them through any issues they may be experiencing.

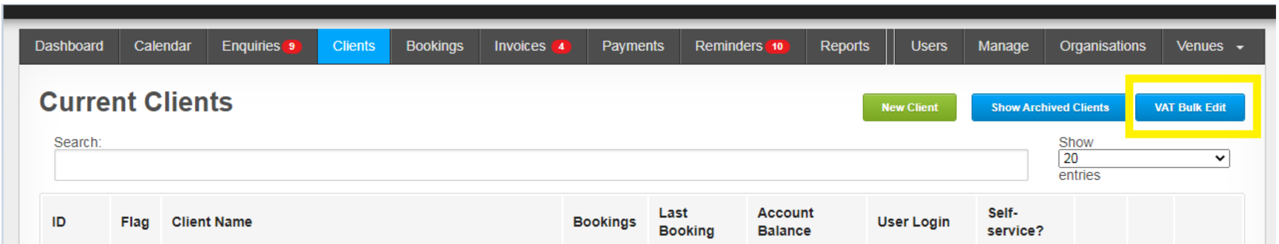
Watch our video tutorial:

Bulk Editing VAT rates for Clients

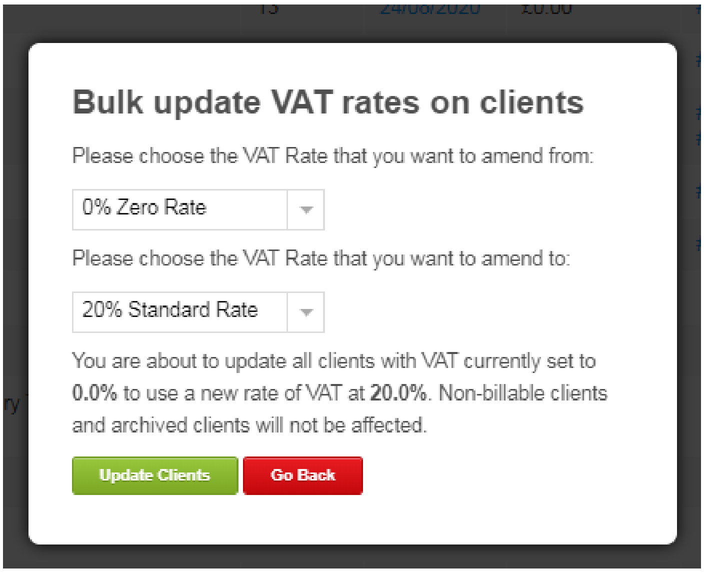
Last Modified on 12/09/2023 9:39 am BST

Master Venue Admins are able to bulk edit all existing billable client's VAT Rates.

This is done easily from the "Clients" tab, using the 'VAT Bulk Edit' button at the top of the tab:

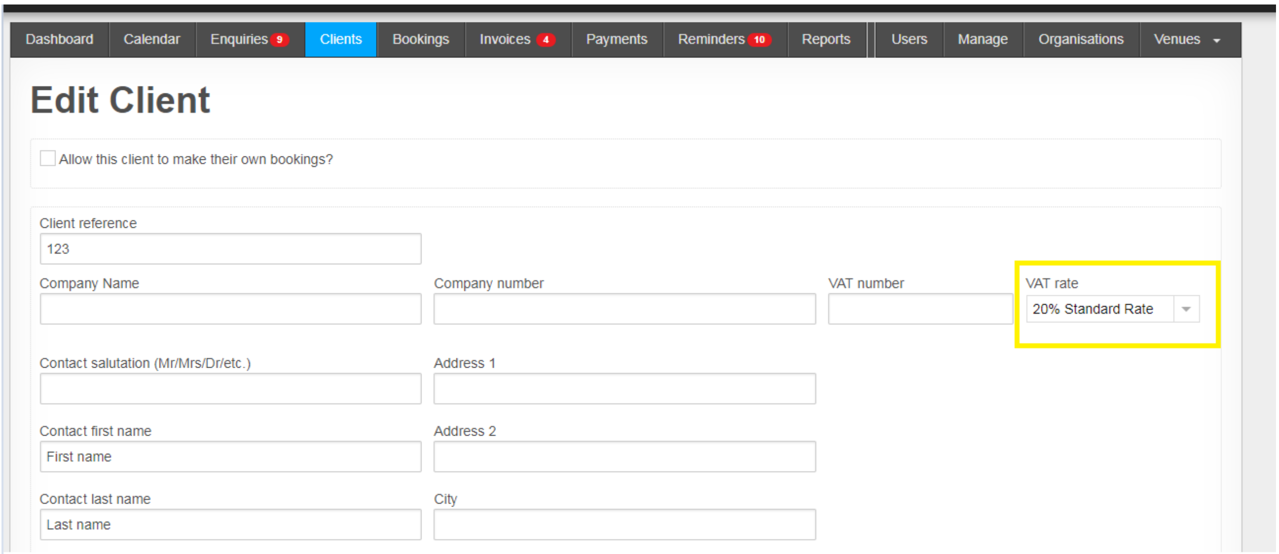


On the popup you can easily select the rate you would like to change clients from, and select the rate you would like to change clients to:



When you have selected your rates and clicked 'Update Clients' please allow for the system to finish the task before you click away from the popup or try to amend any further rates.

Once finished all existing billable clients with the 'From' VAT rate will now have changed as requested. To check this for any clients select 'Edit' for a client on the "Clients" tab - you will be able to see and make any further amendments to the VAT here:



Any future bookings you make for this client, will automatically populate with this rate. You can still change the rate of VAT on any booking though so you retain full control of what you want to charge to the client. If your client is allowed to make their own bookings, then this new VAT rate will be used for any new future bookings they make.

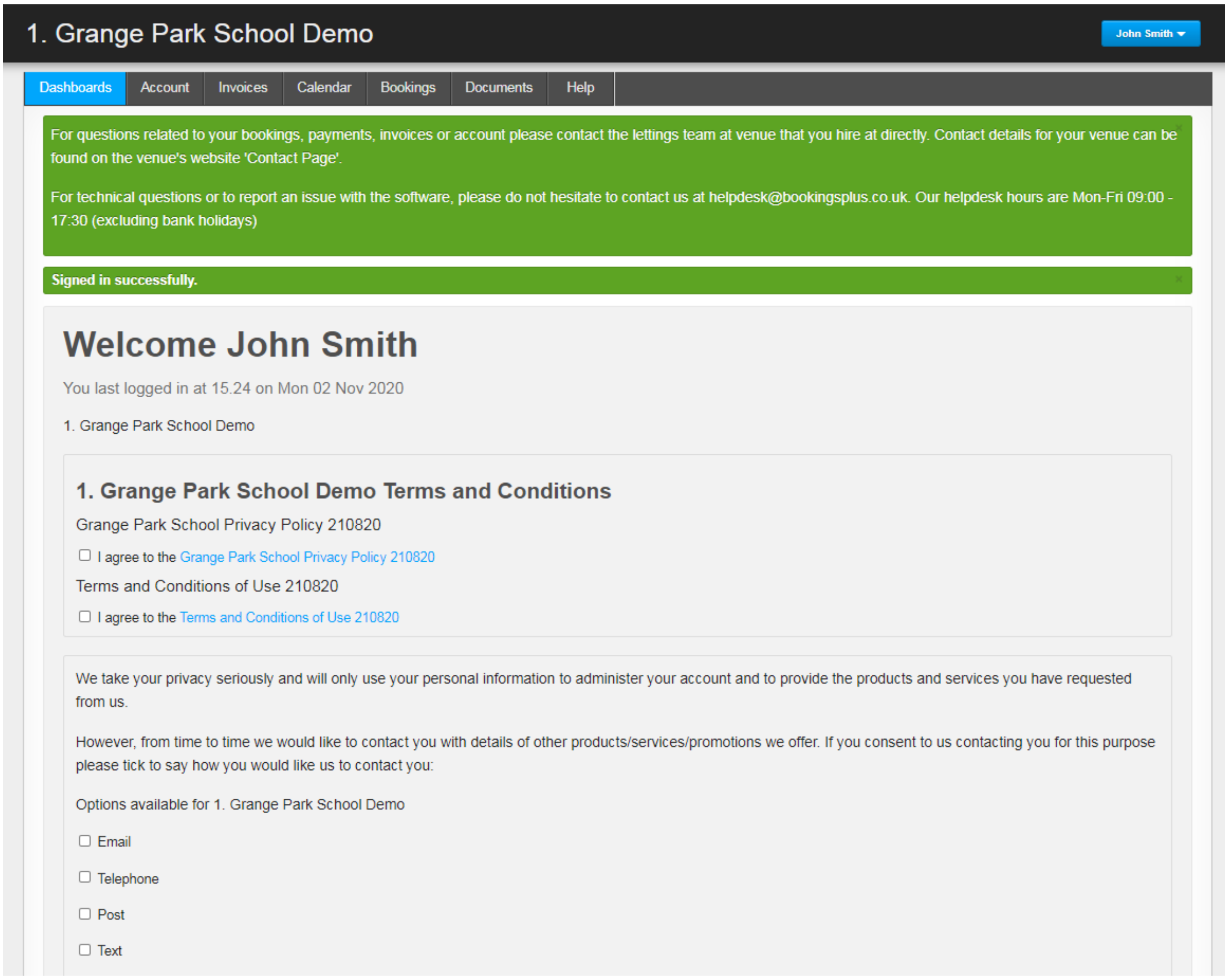
Please note: the update routine does not amend any Archived or Non-Billable Clients

Confirming a Provisional Booking (Hirer)

Last Modified on 12/09/2023 10:22 am BST

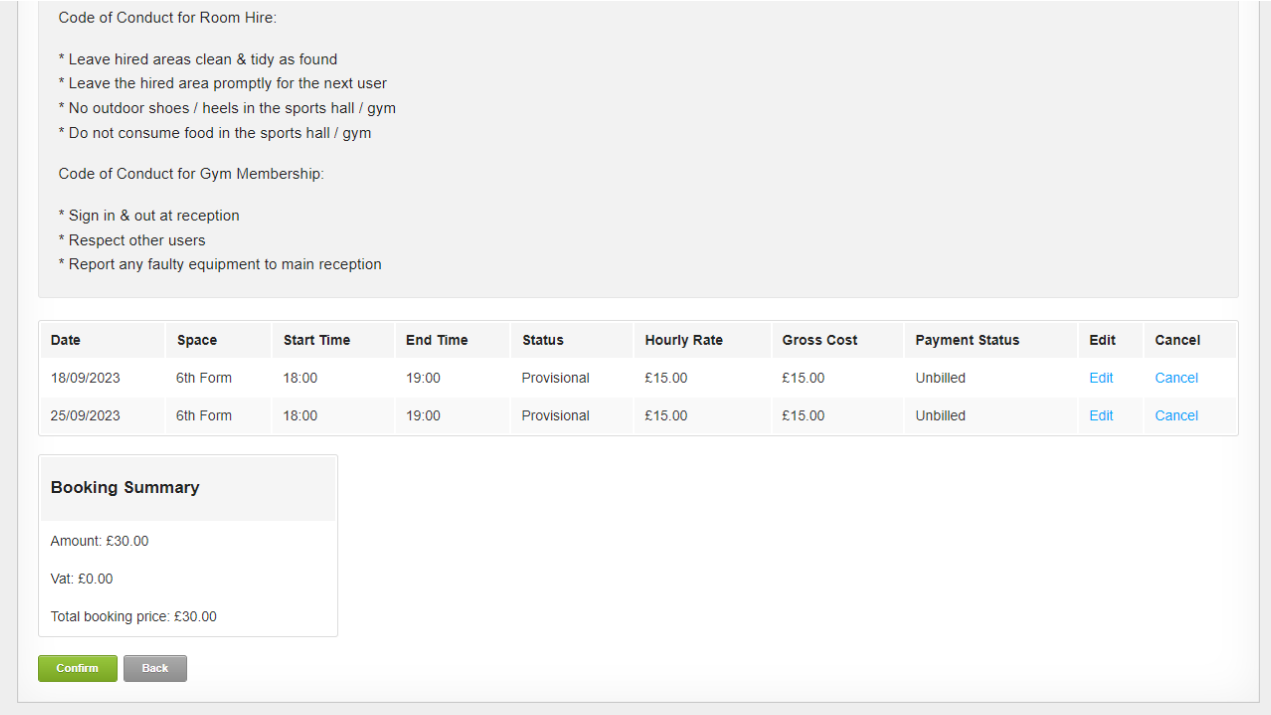
Your hirers are able to view & confirm their bookings within BookingsPlus . This means that they will have to accept your T&C's and Privacy Policy, and also take responsibility for checking the dates/times/spaces included within their booking.

When they log onto their account, they will see the **Dashboard** tab. They will need to accept Terms and Conditions and the Privacy Policy before their 'Bookings' or 'Invoices' become visible.



If the client tries to view invoices/bookings before they have accepted the T&C's, a red banner will appear across the top of the page. As soon as they have clicked to accept the T&C's and Privacy Policy, they will be able to see any 'Provisional Bookings' or 'Outstanding Invoices' on the 'Dashboard', as well as being able to navigate freely around the other tabs.

To confirm a booking, click on **View** hyperlink alongside the booking.


Code of Conduct for Room Hire:

* Leave hired areas clean & tidy as found
* Leave the hired area promptly for the next user
* No outdoor shoes / heels in the sports hall / gym
* Do not consume food in the sports hall / gym

Code of Conduct for Gym Membership:

* Sign in & out at reception
* Respect other users
* Report any faulty equipment to main reception

Date	Space	Start Time	End Time	Status	Hourly Rate	Gross Cost	Payment Status	Edit	Cancel
18/09/2023	6th Form	18:00	19:00	Provisional	£15.00	£15.00	Unbilled	Edit	Cancel
25/09/2023	6th Form	18:00	19:00	Provisional	£15.00	£15.00	Unbilled	Edit	Cancel

Booking Summary

Amount: £30.00

Vat: £0.00

Total booking price: £30.00

Confirm Back

From this screen, they are able to scroll up/down the full list of dates under that booking. If they are correct, they can click to 

. If amendments are required, these can only be done by an administrator. As soon as the bookings are confirmed by the hirer, this will update on your system by an entry appearing on the 'Dashboard', the status updating to 'Confirmed' & the calendar booking showing as 'Confirmed'.

If your venue has Instant Pay switched on, clients will also see a "Pay as you Go" option when confirming. Find out more about how hirers can confirm their bookings when this option is switched on here!

With Self-Booking activated as well, hirers can amend/cancel line items within their booking before confirming. Read through this article to see what clients can alter with this activated.

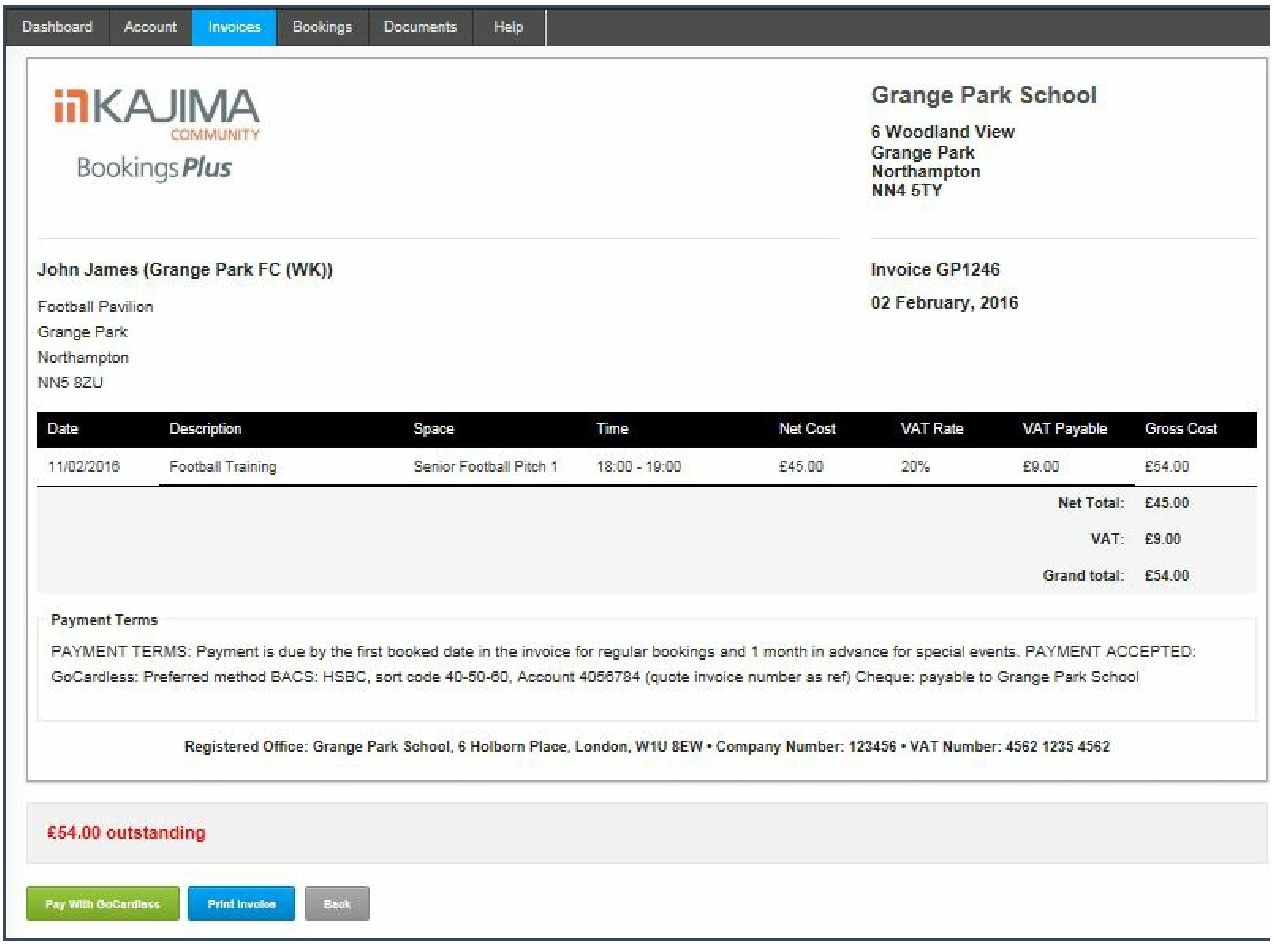
Paying an invoice (Hirer)

Last Modified on 12/09/2023 4:01 pm BST

Paying an Invoice on BookingsPlus is easy with our built in payment gateways. Choose from **GoCardless** or **Stripe** (or both!) to make collecting payments more efficient for you and your clients.

Remember that only the full invoice amount can be paid, so make sure the billing period matches their payment agreement & that any Credit Notes or previous Payments have been Fully Allocated.

GoCardless - See GoCardless for more information on how GoCardless processes payments, and the associated fees.


Dashboard | Account | Invoices | Bookings | Documents | Help

KAJIMA COMMUNITY
Bookings Plus

Grange Park School
6 Woodland View
Grange Park
Northampton
NN4 5TY

John James (Grange Park FC (WK))
Football Pavilion
Grange Park
Northampton
NN5 8ZU

Invoice GP1246
02 February, 2016

Date	Description	Space	Time	Net Cost	VAT Rate	VAT Payable	Gross Cost
11/02/2016	Football Training	Senior Football Pitch 1	18:00 - 19:00	£45.00	20%	£9.00	£54.00
						Net Total:	£45.00
						VAT:	£9.00
						Grand total:	£54.00

Payment Terms

PAYMENT TERMS: Payment is due by the first booked date in the invoice for regular bookings and 1 month in advance for special events. PAYMENT ACCEPTED: GoCardless: Preferred method BACS: HSBC, sort code 40-50-60, Account 4056784 (quote invoice number as ref) Cheque: payable to Grange Park School

Registered Office: Grange Park School, 6 Holborn Place, London, W1U 8EW • Company Number: 123456 • VAT Number: 4562 1235 4562

£54.00 outstanding

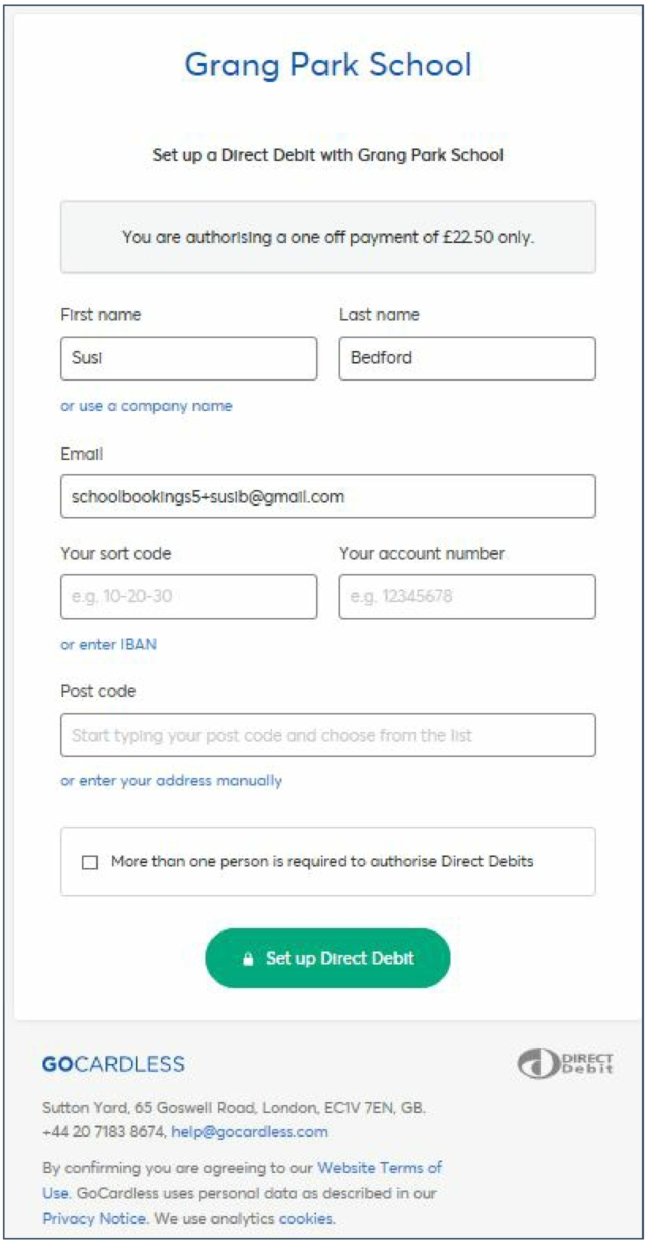
Pay With GoCardless | Print Invoice | Back

After selecting the "Pay with GoCardless" button, your hirer will need to fill out a form, and click 'Set up Direct Debit' to initiate the payment.

The direct debit set-up relates to this payment only, and no further funds will be taken.

GoCardless will then create a mandate so that on subsequent occasions that they click to make a payment they will not need to fill out their Account details (as stated to the client on the pop-up above which will appear before the below form).

Each time you request a payment, the hirer will need to authorise the payment by clicking to "Pay with GoCardless" on their invoice.



Grang Park School

Set up a Direct Debit with Grang Park School

You are authorising a one off payment of £22.50 only.

First name: Susi

Last name: Bedford

or use a company name

Email: schoolbookings5+susib@gmail.com

Your sort code: e.g. 10-20-30

Your account number: e.g. 12345678

or enter IBAN

Post code: Start typing your post code and choose from the list

or enter your address manually

☐ More than one person is required to authorise Direct Debits

Set up Direct Debit

GOCARDLESS

DIRECT Debit

Sutton Yard, 65 Goswell Road, London, EC1V 7EN, GB.
+44 20 7183 8674, help@gocardless.com

By confirming you are agreeing to our Website Terms of Use. GoCardless uses personal data as described in our Privacy Notice. We use analytics cookies.

Once they click on the 'Set up Direct Debit' option, a confirmation screen will appear. Once completed, the invoice will immediately show as 'Pending' on both their account & the administrator account.

Hirers do need to be aware that although they have authorised the transaction, the money is only collected by GoCardless after 3-4 days. They must ensure funds are available at this stage, otherwise the payment will fail (should this occur, you will receive notification from GoCardless, and a note will flag on your "Dashboard" via the 'Payments Requiring Attention section').

If they need to change the account details stored with GoCardless, they can either cancel the mandate with their bank, or a venue Administrator can cancel the mandate from within their GoCardless account.

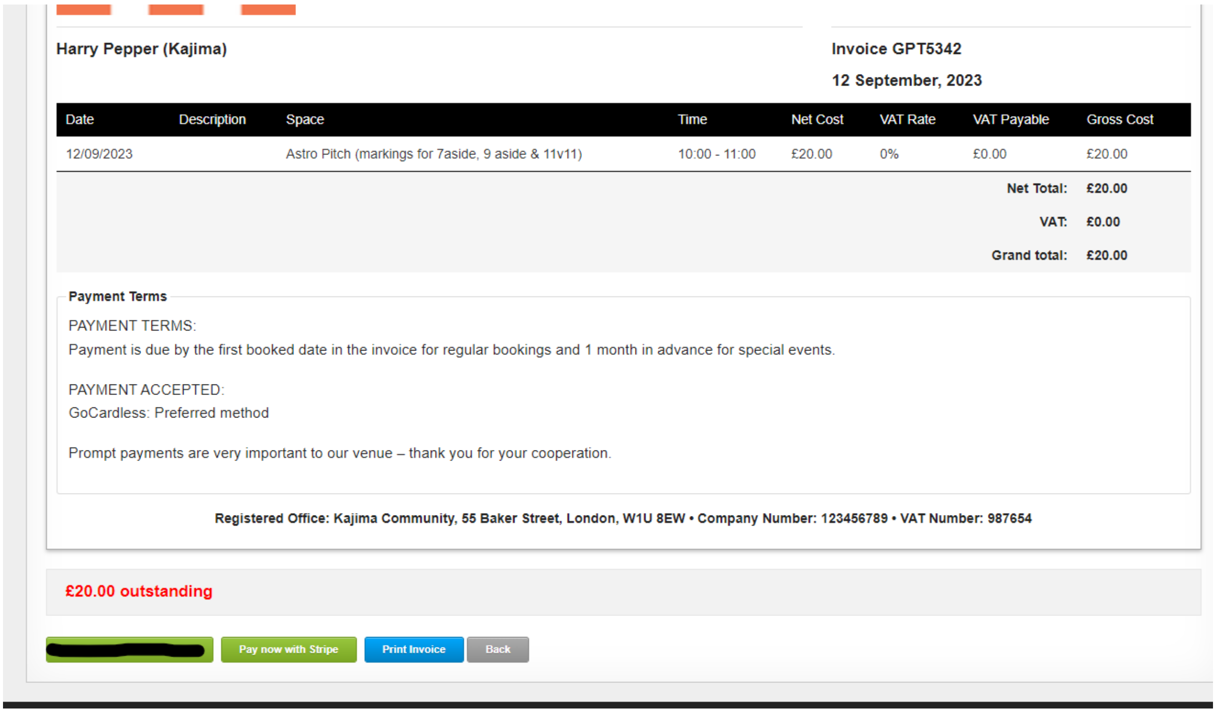
Payments from double signatory accounts:
Payments from accounts with double signatories are accepted with GoCardless, and your hirer will need to tick the relevant box in the form above.

They will then be sent a mandate (via email) from GoCardless to fill out, which will require 2

signatories. Once they send this back to GoCardless, the mandate will be matched to the payment, and the payment will then be processed by GoCardless.

This mandate can then be used for future payments, so that the hirer does not need to fill out the form each time they make a payment.

Stripe -



Harry Pepper (Kajima)

Invoice GPT5342

12 September, 2023

Date	Description	Space	Time	Net Cost	VAT Rate	VAT Payable	Gross Cost
12/09/2023		Astro Pitch (markings for 7aside, 9 aside & 11v11)	10:00 - 11:00	£20.00	0%	£0.00	£20.00
						Net Total:	£20.00
						VAT:	£0.00
						Grand total:	£20.00

Payment Terms

PAYMENT TERMS:
Payment is due by the first booked date in the invoice for regular bookings and 1 month in advance for special events.

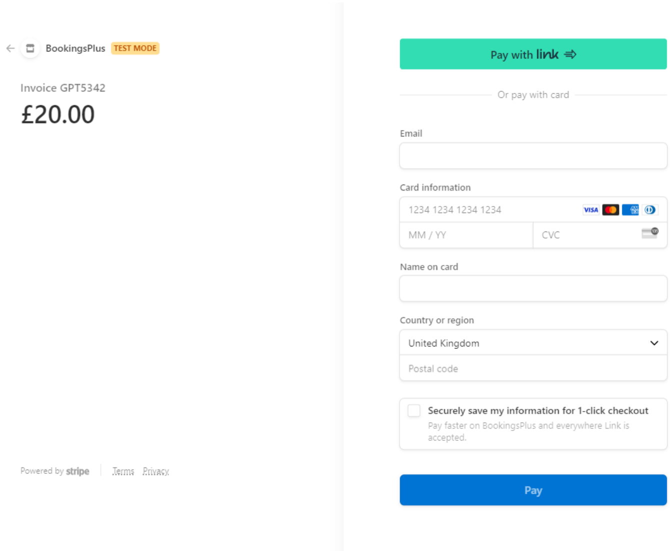
PAYMENT ACCEPTED:
GoCardless: Preferred method

Prompt payments are very important to our venue – thank you for your cooperation.

Registered Office: Kajima Community, 55 Baker Street, London, W1U 8EW • Company Number: 123456789 • VAT Number: 987654

£20.00 outstanding

[redacted] Pay now with Stripe Print Invoice Back



Once the "Pay now with Stripe" option is selected, clients will be taken to a form to enter their debit

card details. Here they'll also see the option to securely save their information for 1-click checkout in future.

If that option is selected, any future times that the client selects "Pay now with Stripe", the payment will process using their saved card.

Should your client ever wish to change/update that card, the "customer" can be deleted from your 'Stripe' login, and the next time they go to make a payment they'll be prompted to enter new details.

Payments made with 'Stripe' process immediately, so if there are issues such as insufficient funds or incorrectly entered card details, these will be flagged immediately to the customer to rectify.

After payment has been made, the status of the payment will immediately be 'Paid', with the 'Pending' flag not applicable.

Uploading documents

Last Modified on 02/11/2020 3:42 pm GMT

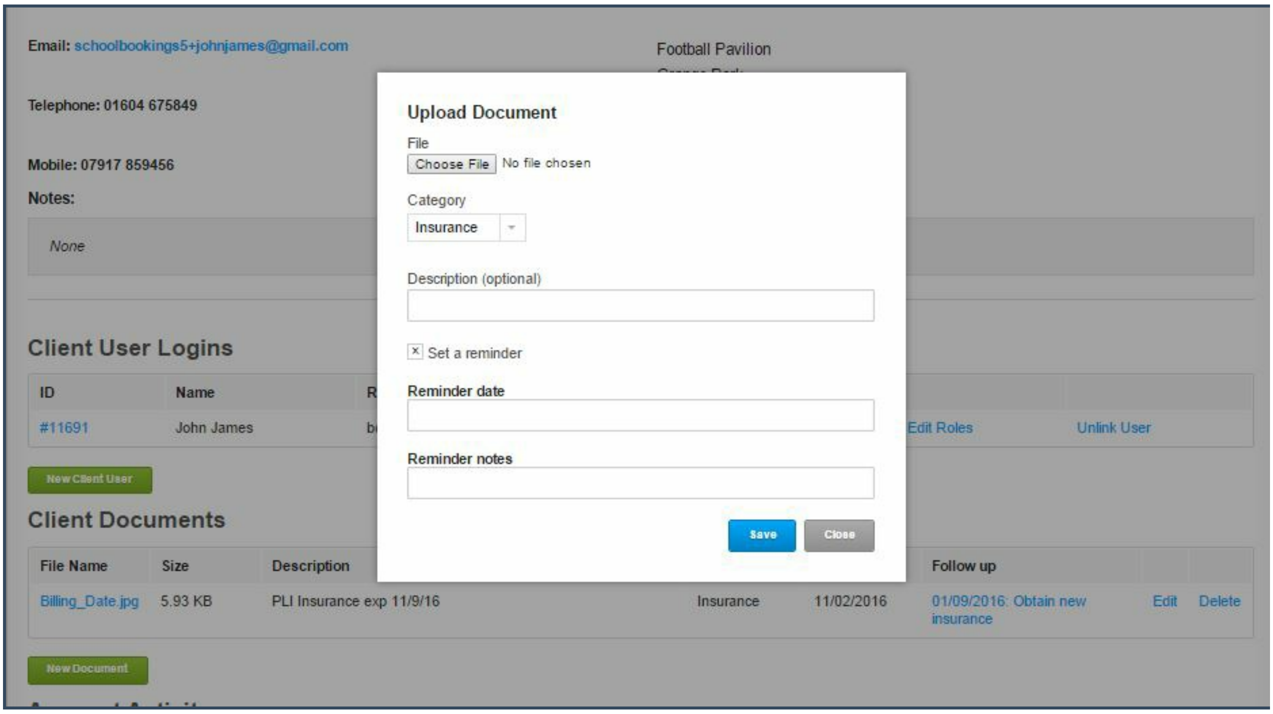
BookingsPlus is the perfect place to store any documents relating to your hirer's bookings.

Many file types can be stored including PDF's, Word documents, JPG's. There is a 2MB limit for each file. For large PDF's, there is an option within Adobe to save as a 'Reduced Size PDF'; this does significantly decrease the document size.

Please note there is a limit of 10 documents per client, and Hirers are able to view any documents you upload from their Documents tab.

Hirers can also upload their own documents. This is also done via the **Documents** tab on their account. They are however unable to delete any documents that they upload, giving you control.

To upload documents as an administrator, select the client required & click 



Within the pop-up box, upload the document. The category can be either Insurance/DBS/Other.

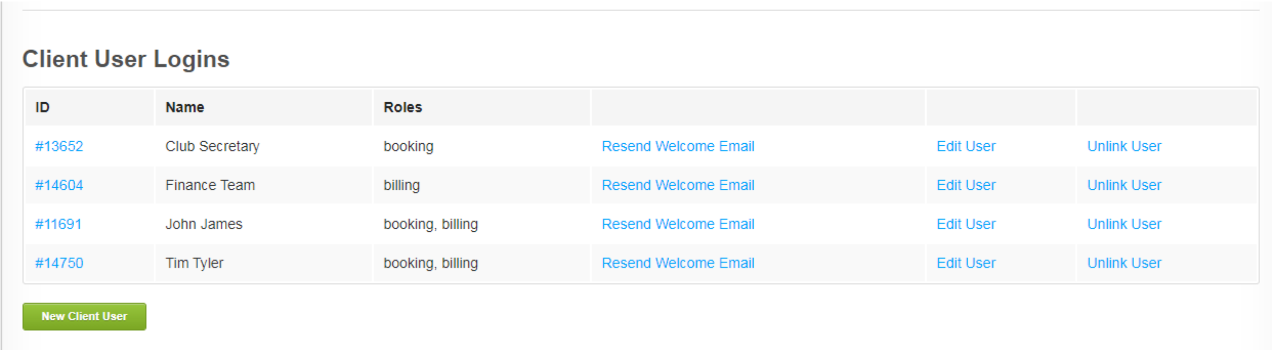
There is the option to set a reminder. This can be really useful for any documentation which expires eg Public Liability Insurance. The reminders will appear on the reminders tab & activate at the due date.

Adding an additional user

Last Modified on 02/11/2020 3:47 pm GMT

If you have a client who requires an additional user on their account, e.g. treasurer or secretary for a football club, then it's easy to add them within BookingsPlus.

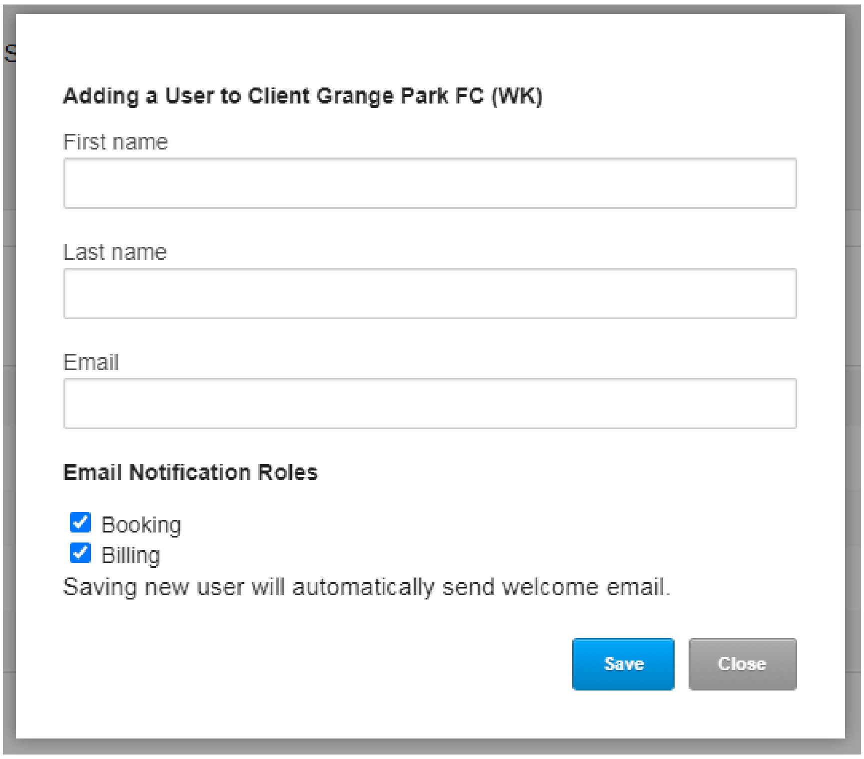
There is no limit to the number of additional users. To add an additional user, Go to the **Clients** tab, search the client and Click **View**. Scroll down to the **Client User Logins:**


Client User Logins

ID	Name	Roles			
#13652	Club Secretary	booking	Resend Welcome Email	Edit User	Unlink User
#14604	Finance Team	billing	Resend Welcome Email	Edit User	Unlink User
#11691	John James	booking, billing	Resend Welcome Email	Edit User	Unlink User
#14750	Tim Tyler	booking, billing	Resend Welcome Email	Edit User	Unlink User

New Client User

Click New Client User and fill in details on the pop-up. Select between Booking/Billing or both and click to Save.



Once saved, the user will automatically receive an email with their password and instructions on how to log onto BookingsPlus.

If a user is no longer associated with a club, simply click Unlink User . This will remove their access to the client account.

Self-service options for clients

Last Modified on 10/02/2021 3:13 pm GMT

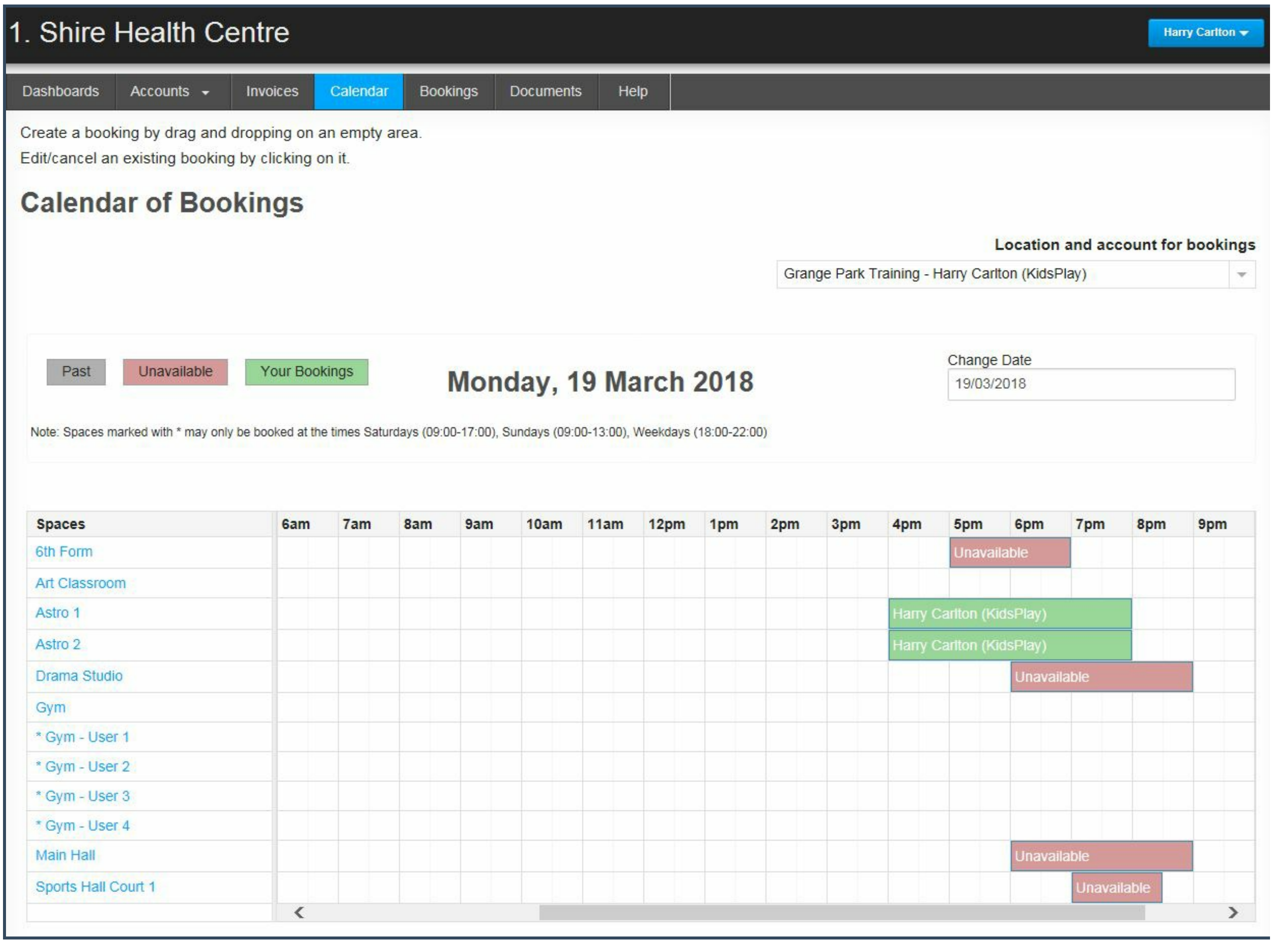
Would you like to allow pre-approved clients the option to make their own bookings?

Then our new feature is perfect for you! You'll retain control in terms of who is able to book, what they can book & also the times available for them to book.

If you would like to find out more about this option, or to go ahead, please call our Customer Service team & they will activate your venue and talk you through the steps required to set it up to your specifications.

Display calendar page on client login

This allows you the option to give all your clients read-only view of your calendar, ideal if you'd like them to view availability instead of contacting your administrators. A sample of this calendar is shown below:



There are no issues regarding confidentiality, as other bookings are simply shown as unavailable, while the clients own bookings are shown in green with full details available to click.

Allow clients to make their own bookings

Once we've activated your venue, we will work through the following steps with you:

Step 1 - Client booking slots (Manage > Venue Management)

These have 2 purposes. Initially to set the general times you wish people to be able to book your facility. For example, if your bookings run from 6-10pm weekdays, you would need a booking slot for this, otherwise clients would be able to book any time over a 24 hour period!

The other purpose for these booking slots is to limit people to book certain time slots only (e.g. 6-7pm, 7-8pm), this may be useful if you only wish people to book only on the hour.

Client Booking Slots

Name	From	To	Days of the Week		
Weekdays	18:00	22:00	Monday, Tuesday, Wednesday, Thursday, Friday	Edit	Delete
Saturdays	09:00	17:00	Saturday	Edit	Delete
Sundays	09:00	13:00	Sunday	Edit	Delete
Gym 6-7pm	18:00	19:00	Monday, Tuesday, Wednesday, Thursday, Friday	Edit	Delete
Gym 7-8pm	19:00	20:00	Monday, Tuesday, Wednesday, Thursday, Friday	Edit	Delete
Gym 8-9pm	20:00	21:00	Monday, Tuesday, Wednesday, Thursday, Friday	Edit	Delete

Step 2 - Calendar categories (Manage > Venue Management)

The calendar categories that you have set up to group your rooms can be used to restrict the times available to book particular spaces, by linking them to your 'Client Booking Slots'. If the 'Use Slots?' is set to 'No', then the system will use the the longest time period set for that day (in your client booking slots), by default. In the example above, this would be 18:00 - 22:00 on weekdays, 09:00 - 17:00 on Saturdays, and 09:00 - 13:00 on Sundays. If the 'Use Slots?' is set to 'Yes' then the shorter time periods (18:00 - 19:00, 19:00 - 20:00, 20:00 - 21:00 on weekdays) will be used. If there are no 'Client Booking Slots' defined, then your clients will be able to book any time of the day for all spaces.

Calendar Categories

Name	Spaces	Use slots?		
Gym Users	4	Yes	Edit	Delete
Gym Membership	3	No	Edit	Delete
Conference & Education Facilities	11	No	Edit	Delete
Dance, Music and Drama Studios	3	No	Edit	Delete
Sports Facilities	7	No	Edit	Delete

New Category

An example of this would be when gym user bookings (in the screenshot above) are using hourly slots (e.g. 6-7,7-8 etc), but the remaining spaces are bookable anytime between 6-10pm. The calendar category would be set to 'Use slots? - Yes' for the Gym Users category only to ensure that the specific short time periods are activated, for the relevant bookable spaces.

Step 3 - Bookable spaces

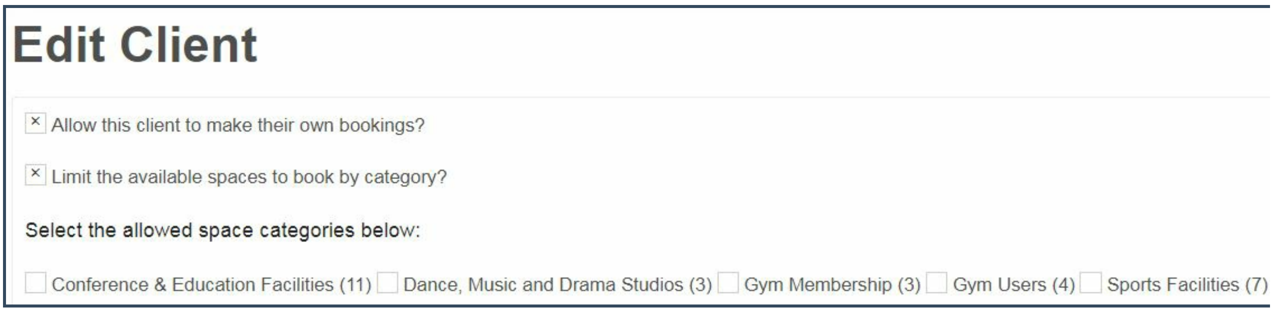
Each bookable space now has the option to 'Allow Client Bookings'. These will default to 'Yes', so please review each space and amend as required. If this is set to 'Yes', the bookable space will show on the clients calendar page for them to be able to view/make bookings against (if they are activated). Also, only the Standard rate on all of the Bookable Spaces will be shown to self service clients, so make sure it is populated correctly.

Bookable Spaces

Name	Allow Client bookings		
1. Venue Notes	No	Edit	Delete
6th Form Conference & Education Facilities	Yes	Edit	Delete
Annual Fee Gym Membership	No	Edit	Delete
Art Classroom Conference & Education Facilities	Yes	Edit	Delete
Astro 1 Sports Facilities	Yes	Edit	Delete

Step 4 - Client activation

Now you've defined your booking criteria, you can now give access to the clients you wish to be able to make their own bookings. This is done via the Edit Client function.



Edit Client

☒ Allow this client to make their own bookings?

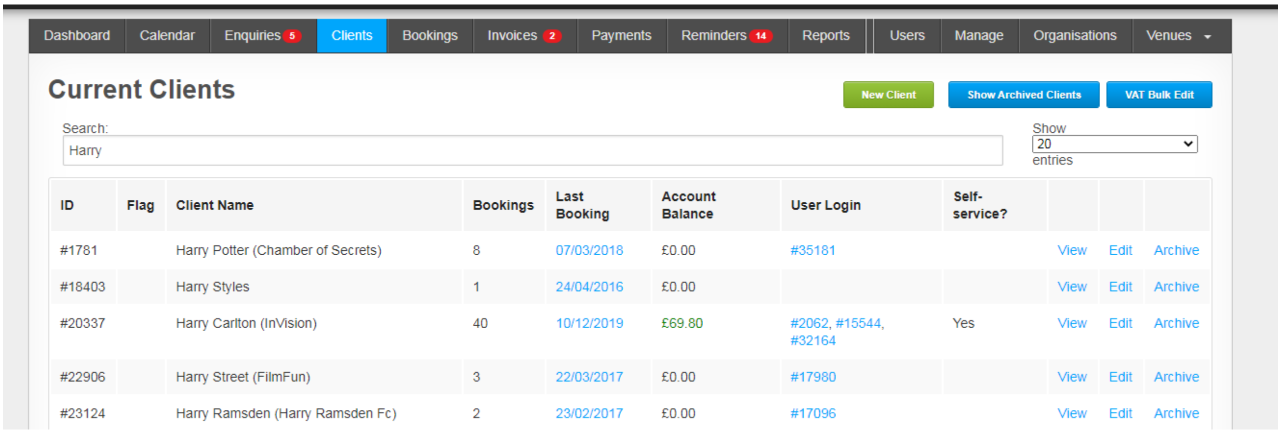
☒ Limit the available spaces to book by category?

Select the allowed space categories below:

☐ Conference & Education Facilities (11) ☐ Dance, Music and Drama Studios (3) ☐ Gym Membership (3) ☐ Gym Users (4) ☐ Sports Facilities (7)

When activating a client to make their own bookings, you'll be able to select from the list of calendar categories once you've ticked the 'Limit the available spaces to book by category?' option. If you wish them to have access to book all activated spaces, do not select this option.

You can easily see from the Client tab who has been given access to this function.



ID	Flag	Client Name	Bookings	Last Booking	Account Balance	User Login	Self-service?			
#1781		Harry Potter (Chamber of Secrets)	8	07/03/2018	£0.00	#35181		View	Edit	Archive
#18403		Harry Styles	1	24/04/2016	£0.00			View	Edit	Archive
#20337		Harry Carlton (InVision)	40	10/12/2019	£69.80	#2062, #15544, #32164	Yes	View	Edit	Archive
#22906		Harry Street (FilmFun)	3	22/03/2017	£0.00	#17980		View	Edit	Archive
#23124		Harry Ramsden (Harry Ramsden Fc)	2	23/02/2017	£0.00	#17096		View	Edit	Archive

Once this is done, we will set up a test client to ensure that the functionality is working correctly and the appropriate controls are in place.

The client account is designed to be intuitive, however we do have a step by step guide available in the online help which could be downloaded & sent out to your clients if required. Client self-booking guide

Client Self-Booking guide

Last Modified on 12/09/2023 10:40 am BST

Guide for clients to manage their bookings online

With BookingsPlus you can allow your clients to book their own sessions online, via their client account.

This quick and simple booking tool means they can book sessions with you out of normal office hours, at a time which may be more convenient for them, online and on the go!

If you would like your clients to benefit from Self-Booking, contact our Helpdesk to have this feature activated at your venue(s): **helpdesk@schoolbookings.co.uk**

Once that's activated, you can send the below information to them as a step by step guide...

1. Login to the system

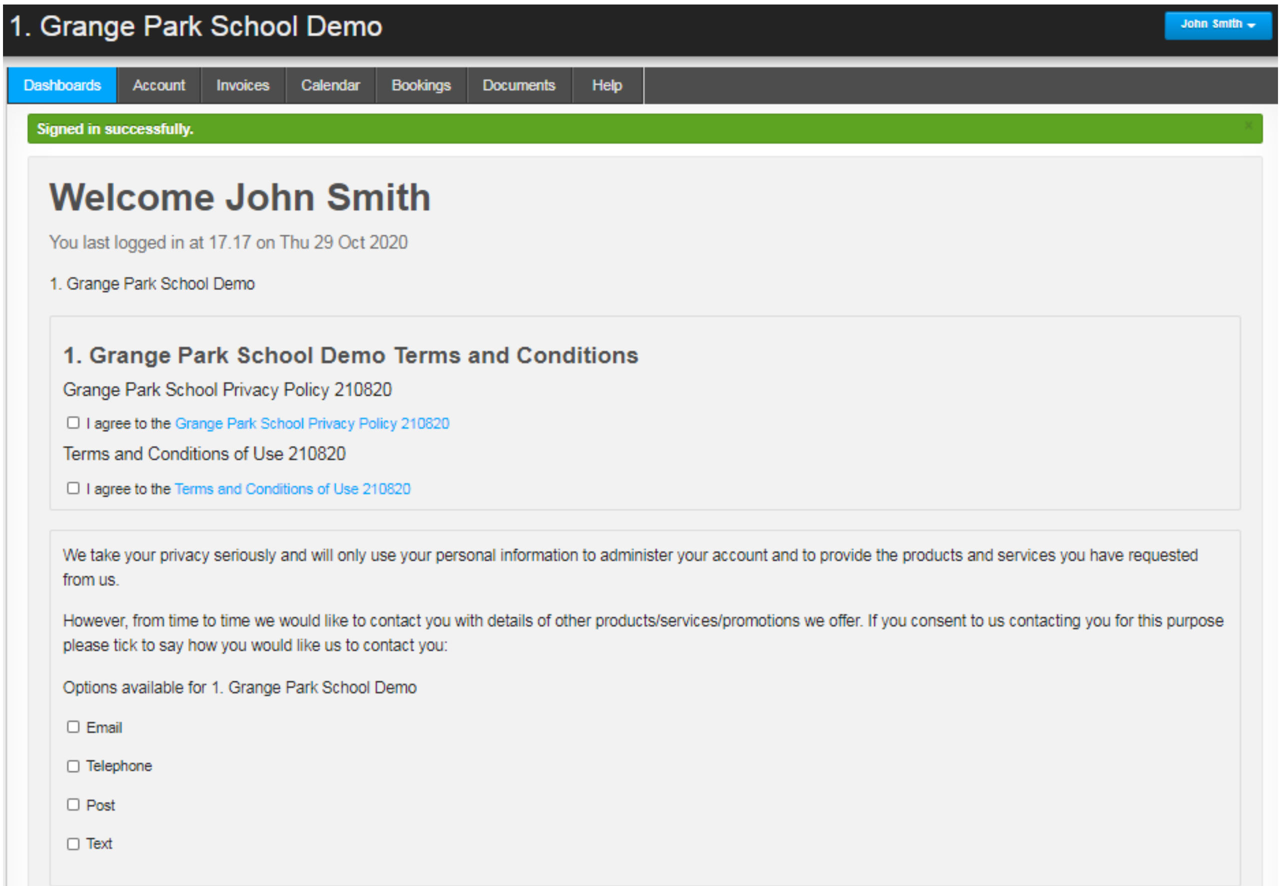
Login via https://my.schoolbookings.co.uk/users/sign_in

If you forget your password, there's a link to reset your password on that login page.

Once logged in, your Dashboard will be visible. From here you'll be able to see any actions required (bookings to confirm, invoices to pay etc).

If you wish to change your password at any point, click on the blue button with your name (top right of your screen) and select 'Edit Account'.

You are required to accept the venue's booking Terms and Conditions and Privacy Policy before your account is fully functional. If you wish to read a copy of the document, simply click to download. Once you're happy and ready to sign, tick to accept.



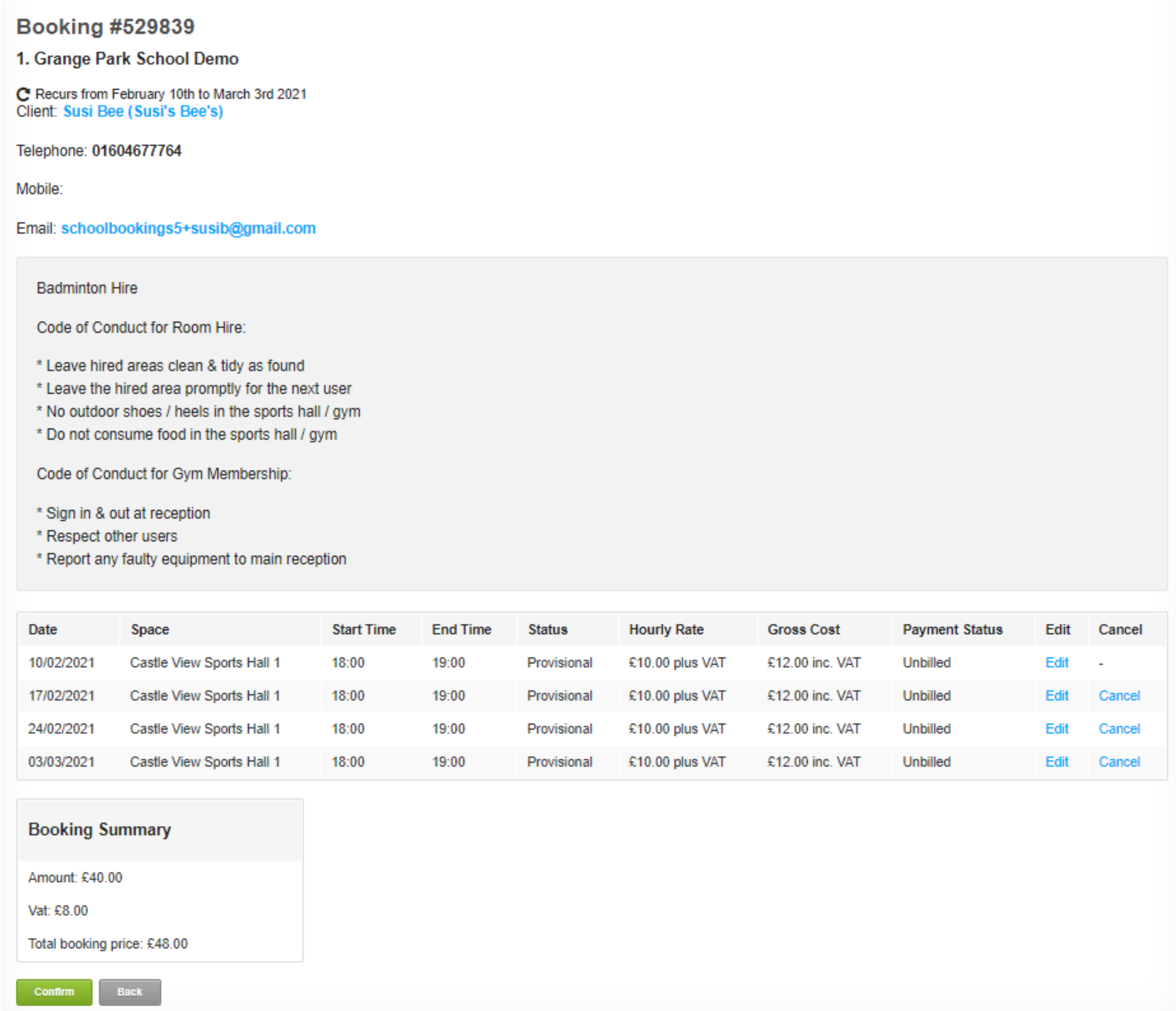
2. Confirm existing bookings

Any provisional bookings which have been made by the administrator will be visible on your dashboard.

You are required to check and confirm these bookings – to do this, click ‘View’ next to the booking. This will take you to the detail of the booking.

Once you’ve checked the dates/times/room which have been booked for you, click the green ‘confirm’ button at the bottom of the screen.

Please repeat this step for all provisional bookings which appear on the dashboard.



Booking #529839

1. Grange Park School Demo

Recurs from February 10th to March 3rd 2021
Client: Susi Bee (Susi's Bee's)

Telephone: 01604677764

Mobile:

Email: schoolbookings5+susib@gmail.com

Badminton Hire

Code of Conduct for Room Hire:

* Leave hired areas clean & tidy as found
* Leave the hired area promptly for the next user
* No outdoor shoes / heels in the sports hall / gym
* Do not consume food in the sports hall / gym

Code of Conduct for Gym Membership:

* Sign in & out at reception
* Respect other users
* Report any faulty equipment to main reception

Date	Space	Start Time	End Time	Status	Hourly Rate	Gross Cost	Payment Status	Edit	Cancel
10/02/2021	Castle View Sports Hall 1	18:00	19:00	Provisional	£10.00 plus VAT	£12.00 inc. VAT	Unbilled	Edit	-
17/02/2021	Castle View Sports Hall 1	18:00	19:00	Provisional	£10.00 plus VAT	£12.00 inc. VAT	Unbilled	Edit	Cancel
24/02/2021	Castle View Sports Hall 1	18:00	19:00	Provisional	£10.00 plus VAT	£12.00 inc. VAT	Unbilled	Edit	Cancel
03/03/2021	Castle View Sports Hall 1	18:00	19:00	Provisional	£10.00 plus VAT	£12.00 inc. VAT	Unbilled	Edit	Cancel

Booking Summary

Amount: £40.00

Vat: £8.00

Total booking price: £48.00

Confirm Back

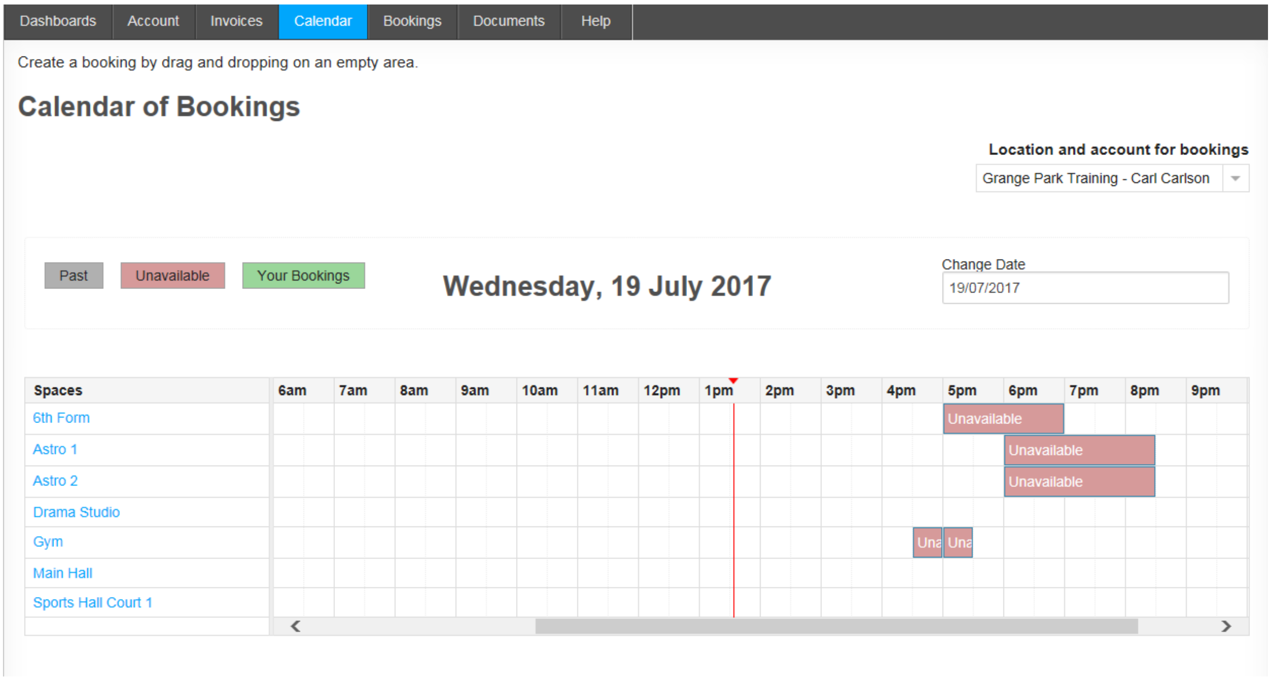
3. Check availability and make new bookings

You’re able to check room availability and make new bookings via the ‘Calendar’ tab.

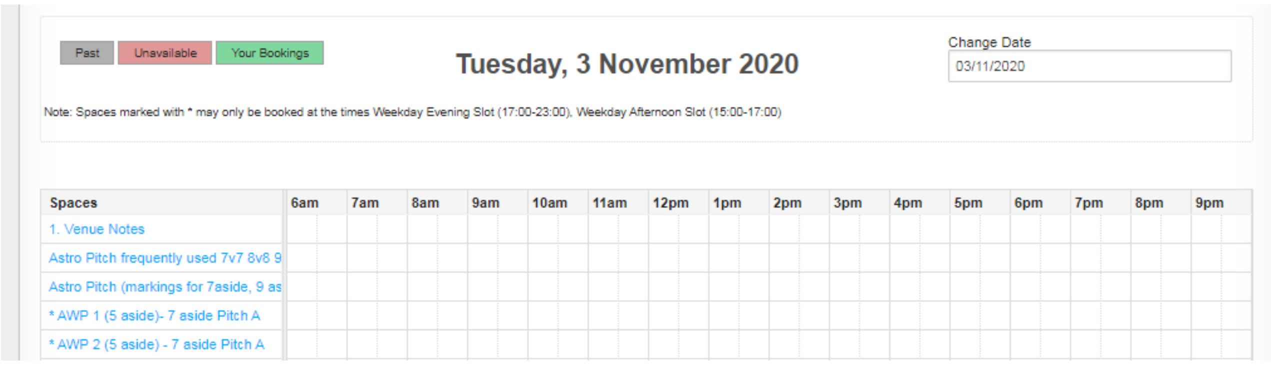
If you hire at multiple BookingsPlus venues, click the drop-down option at top right of screen to select the correct venue.

The calendar will show your bookings in green, as well as any unavailable slots in red.

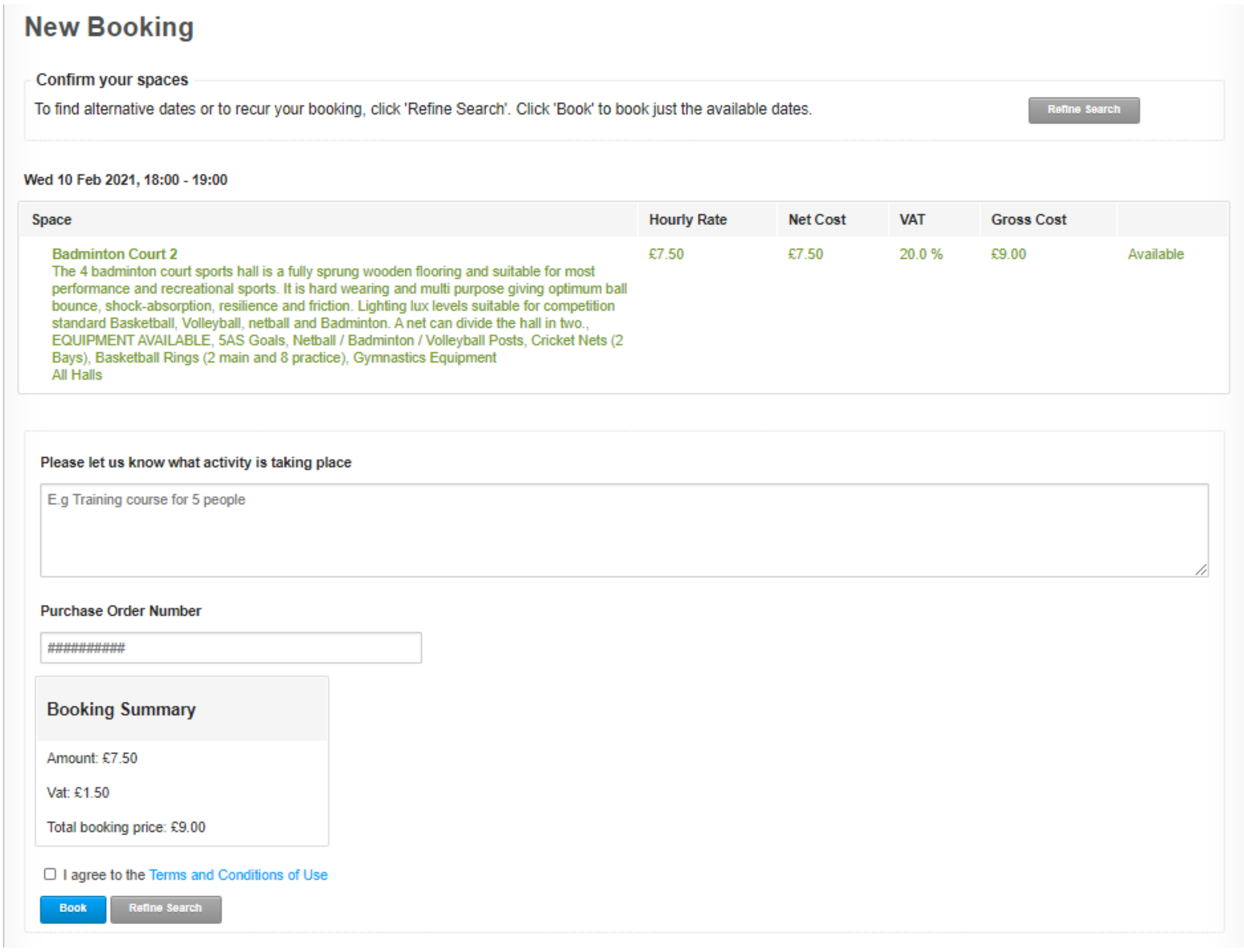
To view room information, click on the room name (in blue) to the left of the calendar view.



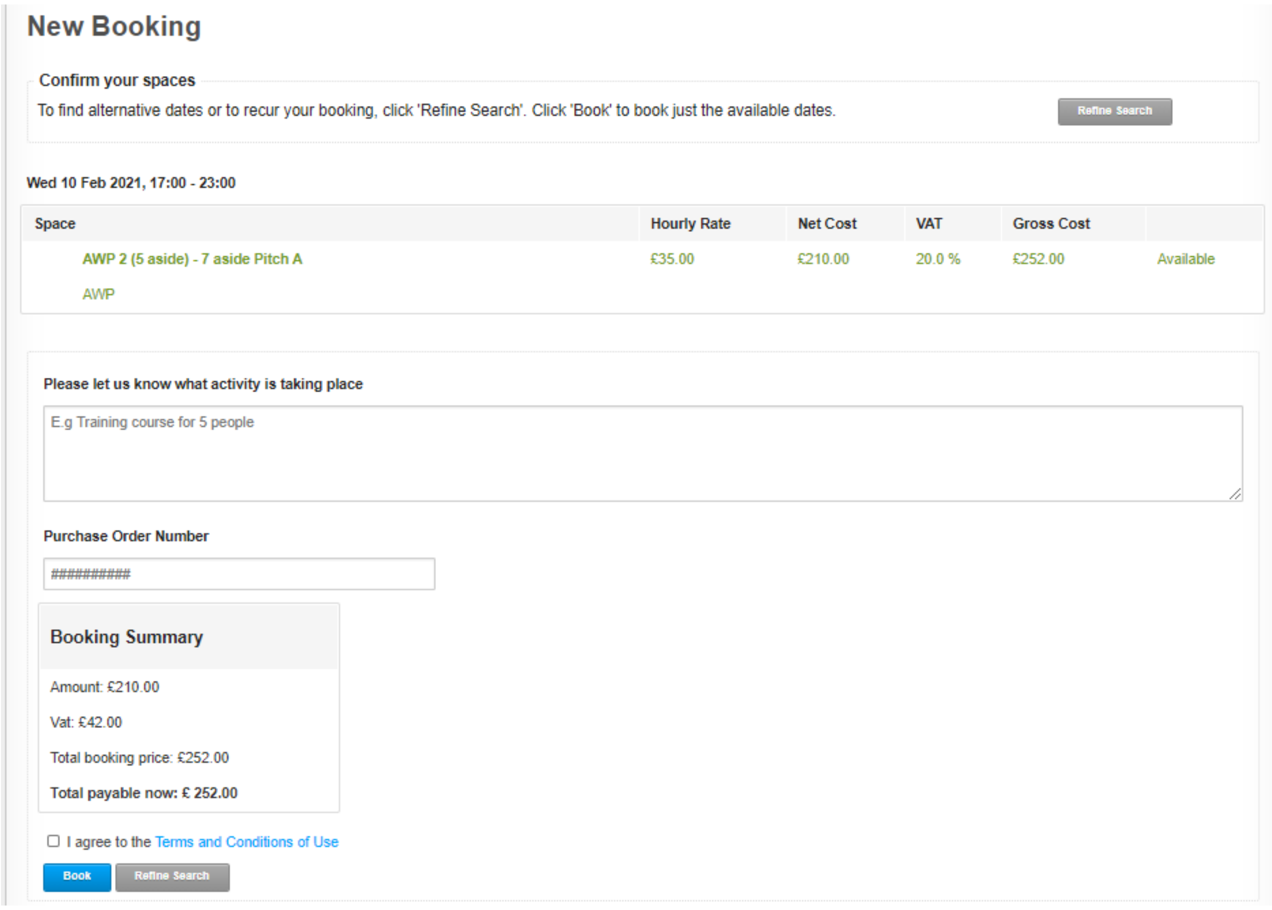
If the room has a * after the name it means that it is a 'slotted space', where availability is restricted to a block, rather than being able to select the start and end time. The Slots that are set up against that venue will show at the top of the calendar table:



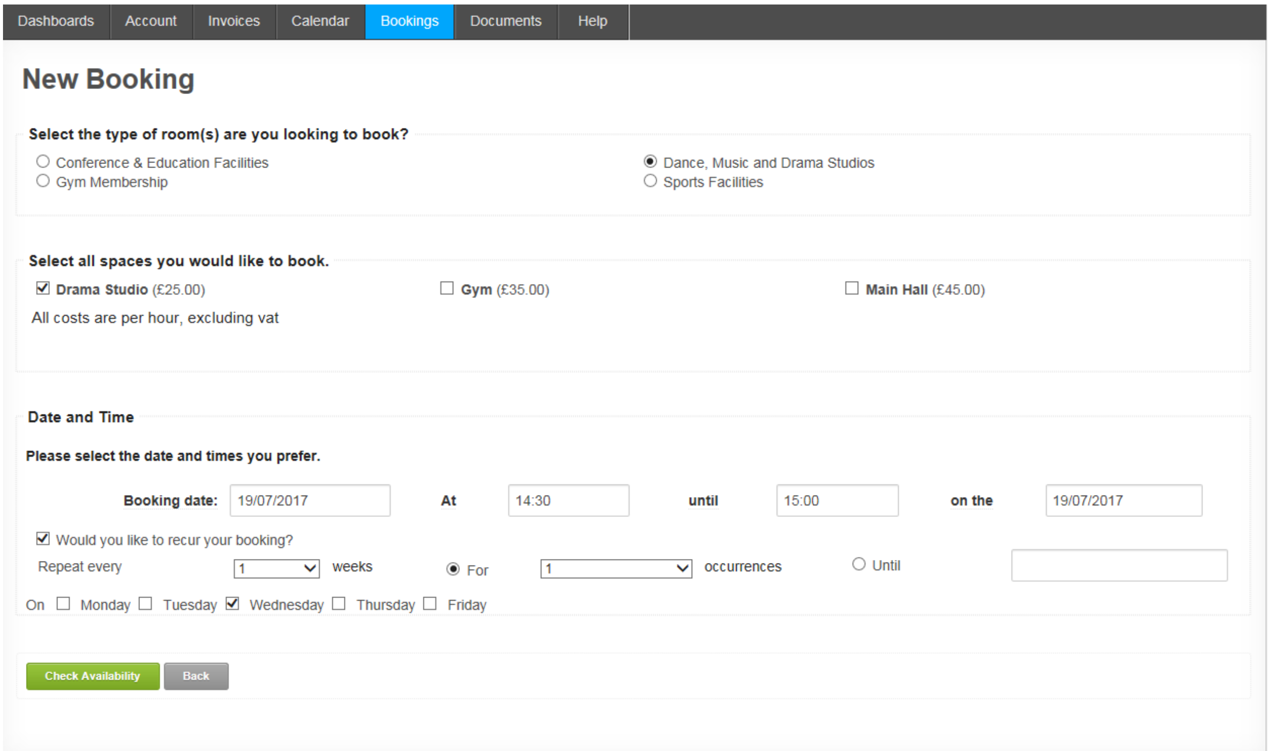
To make a new booking, click and drag on the time you require against the room name. This will take you to a page to see the Booking Summary, and give you the option to either **Book** to create the booking for one date, or **Refine Search** to add additional occurrences.



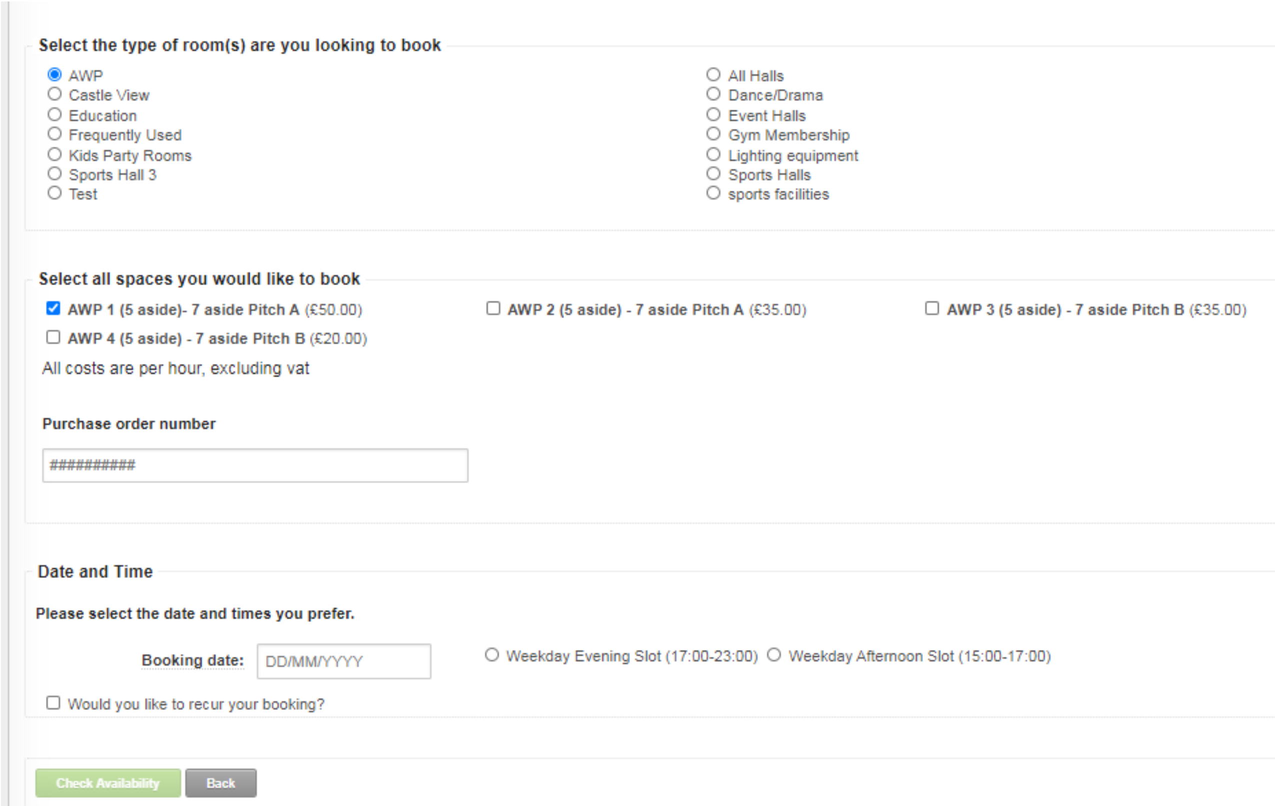
If you select a slotted room, it will default to the slot that covers the time frame you selected:



If you would like to make it a recurring booking, click the **Refine Search** button. The screen will be pre-filled with previous selections, simply select the recurrences required and click ‘Check availability’. The full selection of dates will be shown, any dates in green are available, red indicates unavailable. If dates are unavailable you can click **Refine search** again, select another suitable space and check availability again.



Slotted rooms will show the available blocks here, rather than a start and end time:



Once you are happy with all of the dates shown, scroll to the bottom of the page to enter a short description of the activity taking place, enter a Purchase Order (if required), tick to agree to the Terms and Conditions and click **Book**.

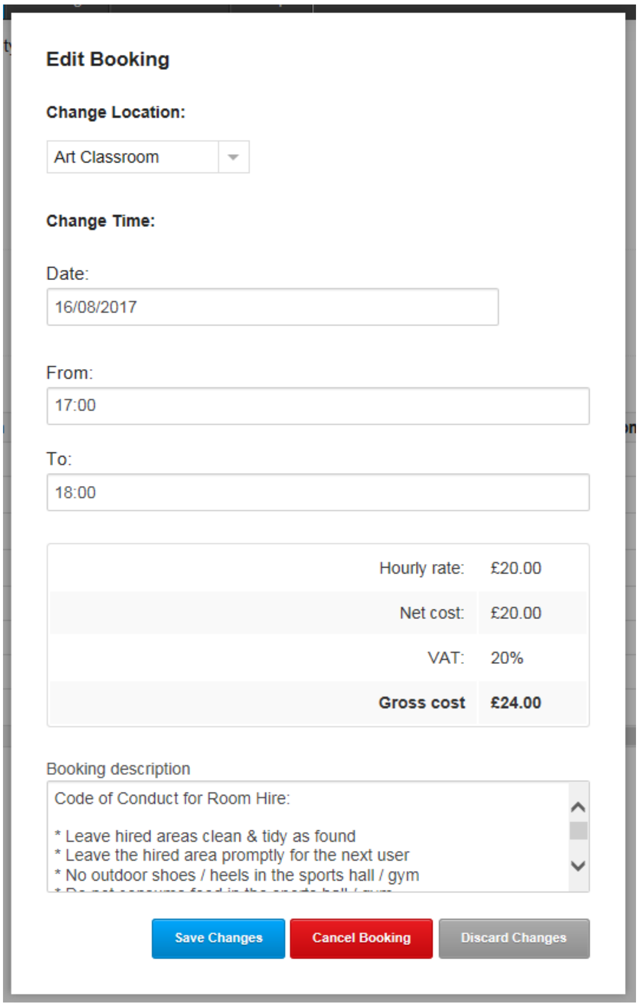
Once the booking has been made, you'll receive a confirmation email and the venue will arrange an invoice for the booking.

All your bookings can be viewed via the 'Bookings' tab. All your invoices can be viewed via the 'Invoices' tab.

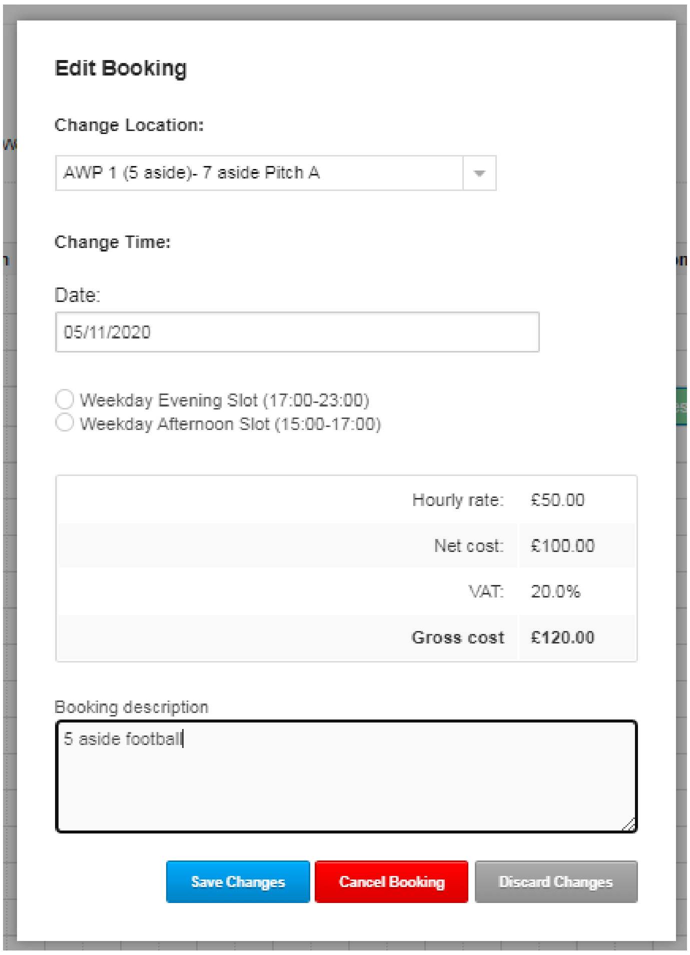
4. Edit or cancel existing bookings

To edit a **single** booking, locate the booking from the 'Calendar' tab. Click the booking and amend the space and time, on the pop-up form.

From the calendar page, you're also able to drag and drop your booking into another room and drag to change the times. Both of these actions will create the pop-up to confirm your changes:

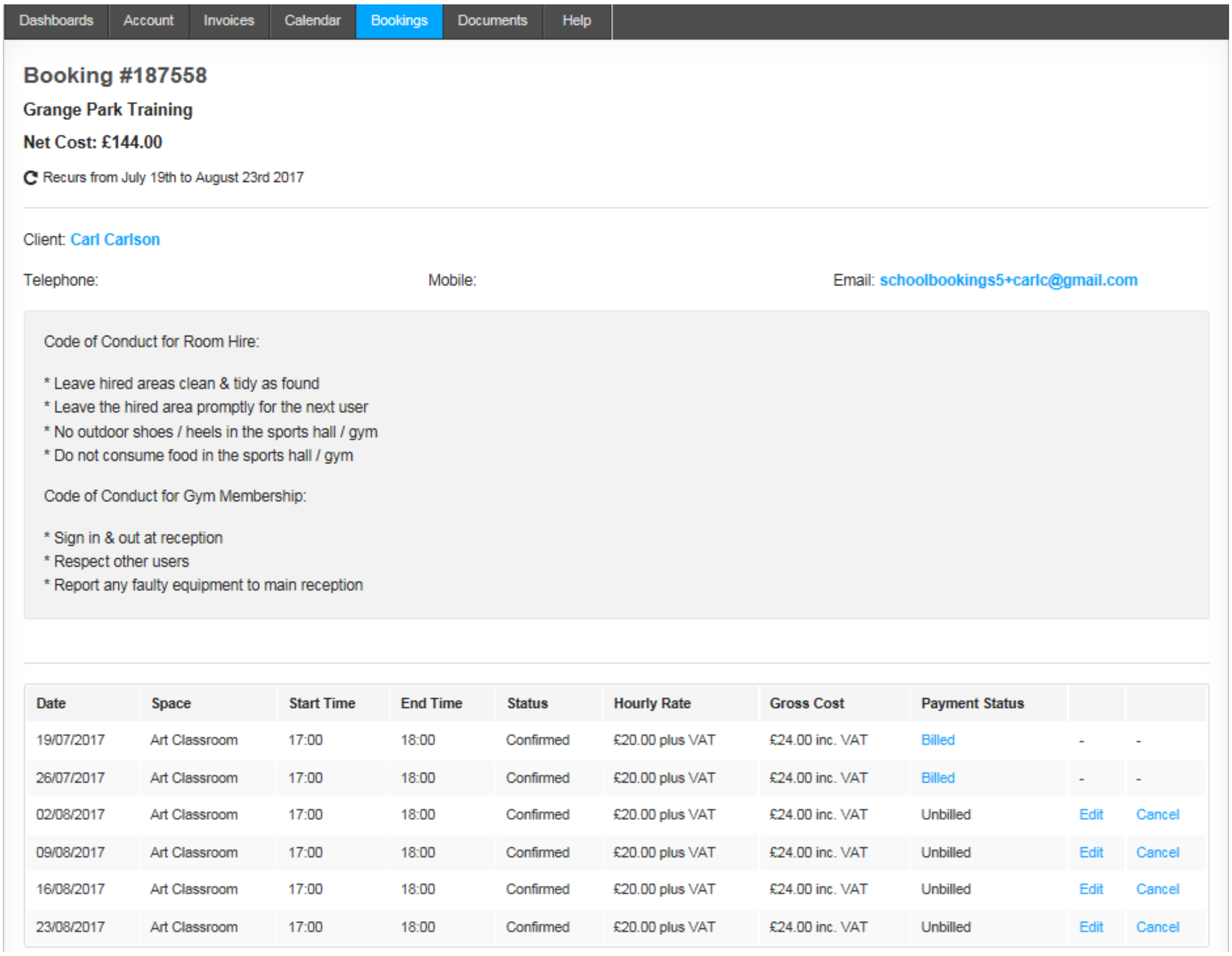


For Slotted rooms, again the start and end time will be replaced by all slots set up for that date:



To edit a **recurring** booking, click on the bookings tab. From the detailed view, you can use the filters to locate your booking. Alternatively, switch to the summary view to see a high level list of your bookings.

From the booking form (shown below), you'll be able to edit each line item as required. Cancellations can be made from the same screen.



Dashboards | Account | Invoices | Calendar | Bookings | Documents | Help

Booking #187558

Grange Park Training

Net Cost: £144.00

Recurs from July 19th to August 23rd 2017

Client: Carl Carlson

Telephone: Mobile: Email: schoolbookings5+carlc@gmail.com

Code of Conduct for Room Hire:

* Leave hired areas clean & tidy as found
* Leave the hired area promptly for the next user
* No outdoor shoes / heels in the sports hall / gym
* Do not consume food in the sports hall / gym

Code of Conduct for Gym Membership:

* Sign in & out at reception
* Respect other users
* Report any faulty equipment to main reception

Date	Space	Start Time	End Time	Status	Hourly Rate	Gross Cost	Payment Status		
19/07/2017	Art Classroom	17:00	18:00	Confirmed	£20.00 plus VAT	£24.00 inc. VAT	Billed	-	-
26/07/2017	Art Classroom	17:00	18:00	Confirmed	£20.00 plus VAT	£24.00 inc. VAT	Billed	-	-
02/08/2017	Art Classroom	17:00	18:00	Confirmed	£20.00 plus VAT	£24.00 inc. VAT	Unbilled	Edit	Cancel
09/08/2017	Art Classroom	17:00	18:00	Confirmed	£20.00 plus VAT	£24.00 inc. VAT	Unbilled	Edit	Cancel
16/08/2017	Art Classroom	17:00	18:00	Confirmed	£20.00 plus VAT	£24.00 inc. VAT	Unbilled	Edit	Cancel
23/08/2017	Art Classroom	17:00	18:00	Confirmed	£20.00 plus VAT	£24.00 inc. VAT	Unbilled	Edit	Cancel

Please note: you'll be unable to cancel if your booking is in the past or less than 48 hours away.

Should you wish to cancel multiple booking lines, or the entire booking, contact the administration team for that venue and they can make those changes for you.

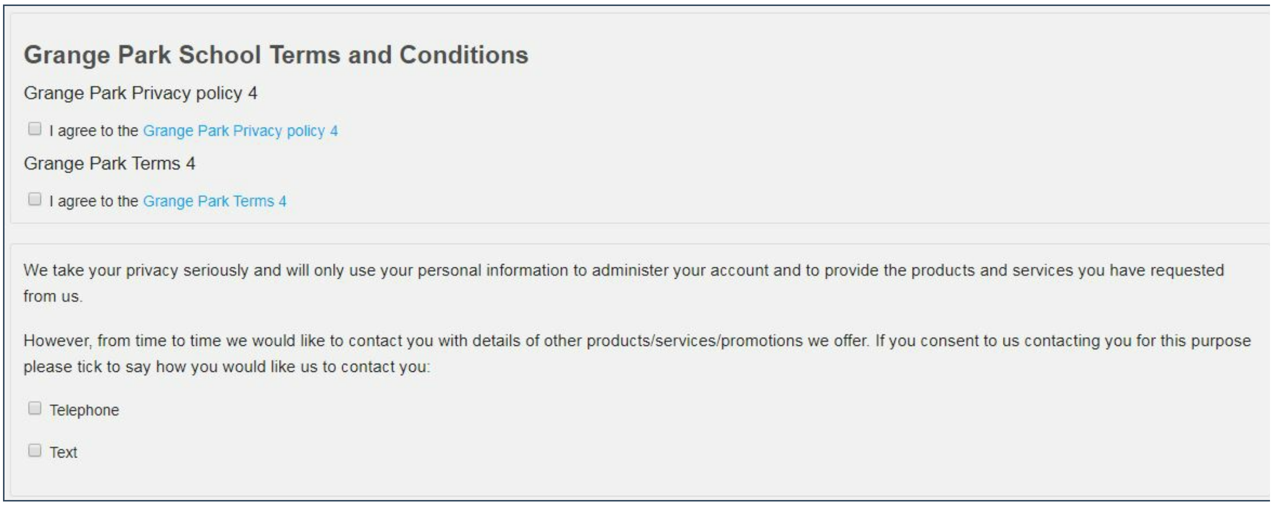
If on the 'Check Availability' page you are given a total payable now, and once you click to create your booking it is showing as Tentative; then your venue will have set up **Instant Payment**. This means you will be required to pay for this and past calendar months, before securing your bookings. View our Knowledge Owl here for further information on this.

Privacy Policy & Marketing Preferences on the Clients Account

Last Modified on 18/02/2022 12:02 pm GMT

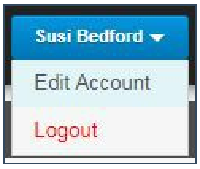
BookingsPlus enables you to present your privacy policy to your clients in their online account and also allows you to display your chosen marketing options to them. To set this up please see our article: Set-up Privacy Policy and Marketing Preferences

Once you have set-up your privacy policy and your preferred marketing options your clients will be presented with these the next time that they log into their account. They will be able to view your privacy policy and click to agree and also will be able to indicate their preferred marketing options. If you have also added some new terms these will also display for their agreement.

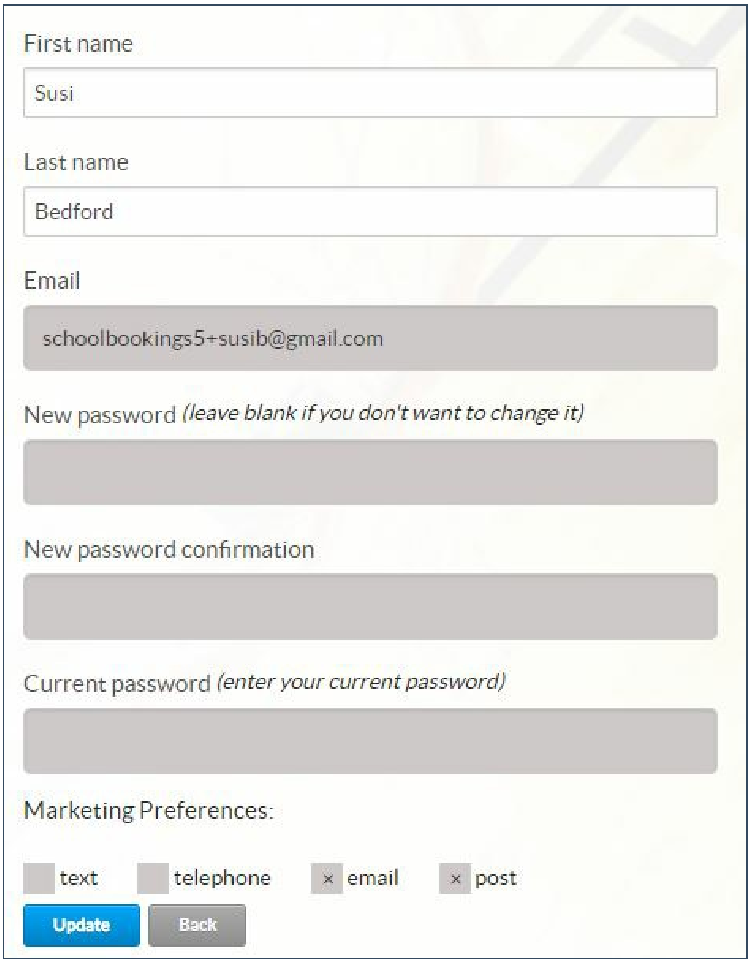


Only once the client has accepted your privacy policy (and terms, if applicable), will they be able to view their bookings & make payments etc.

The client can edit their marketing options, user name, email and password at any time by clicking their name, then Edit Account in the drop down in the top right hand corner of their system login screen.



There they can then tweak their choices, enter their current password and click update.



Please note that this will not change the contact details you hold on their clients account (name, email etc). It will only amend their user login details. This will ensure that all requests for name changes on their client account, come through the venue and that a client cannot just amend their contact details.

Adding Client Flags

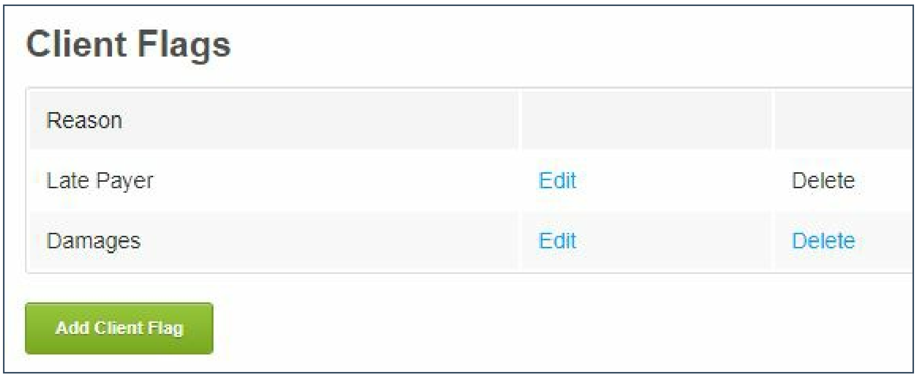
Last Modified on 02/11/2020 4:36 pm GMT

Client flags give the administrator the ability to flag certain clients and be able to draw attention where they may be an issue, or just that there is something different about that account. For example; it may be the case that that client is owing a payment, or that the client needs to be invoiced weekly.

To add this setting in, go to the **Manage** Tab, scroll down the **Venue Management** sub tab to **Client Flags**.

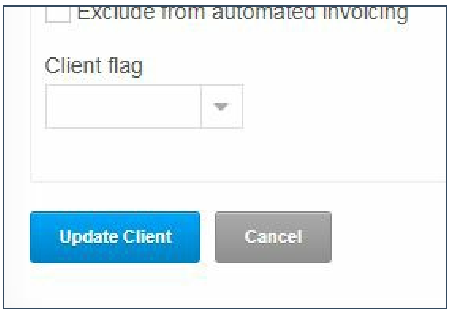
Click **Add Client flag**, and type in a reason for the flag, and click **Save**. Please note that this has a limit of 25 characters.

You can add as many different flags as needed.

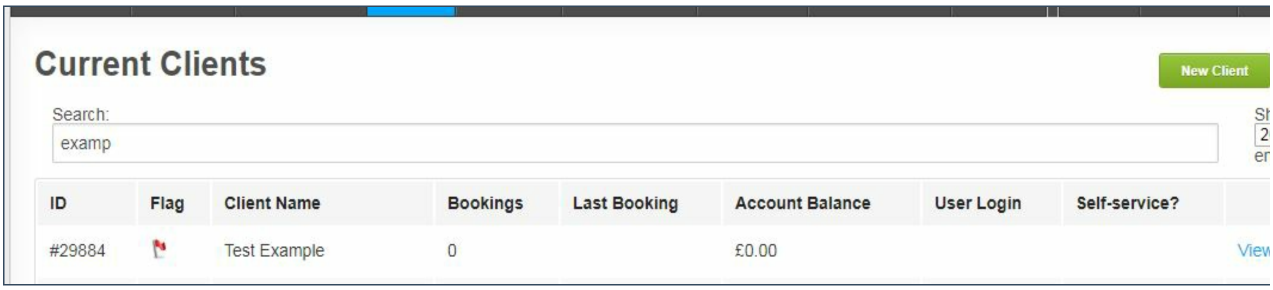


In order to then allocate the flag to a client account, click into the **Clients** tab, find the client and click **Edit**.

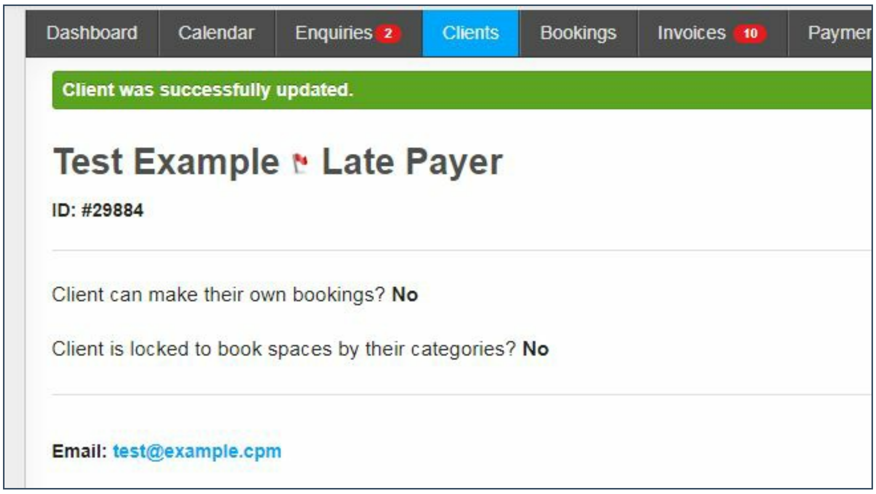
Scroll down to the bottom of the page to select the reason from the Client flag drop down menu, and click **Update Client**.



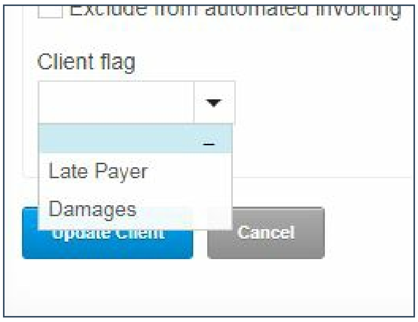
This flag will now show on the Clients tab:



and at the top of a Clients account:



If you would like to remove a flag from a Clients account, click back into the **Edit** page, select the blank space from the Client flag drop down and click **Update Client**



Please note the following:

- These flags are not visible to a client when logged into their client account.
- Once a Client flag has been allocated against a client it cannot be deleted from the Manage Tab.

Adding VAT to a Client

Last Modified on 03/02/2021 5:31 pm GMT

With the proposed changes to the UK's VAT rates, we have updated how you can set VAT at your venue, both on Client's accounts and for New and Existing Bookings.

Instead of the old text box, our new drop-down option allows you to quickly and easily adjust VAT rates for your clients bookings!

Setting a Client's VAT Rate

1) Create a new Client from the Clients tab

2) At the top right, above their Address details, you can see the VAT drop-down box: VAT rate 20 %

3) From the pre-set list, select the VAT Rate for this Client (this will be kept at your venues default VAT Rate if unchanged)

With this set, any new booking for this Client will automatically reflect this new VAT Rate!

To adjust the VAT Rate of an Existing Client , you can view their account from the Clients tab, and select the Edit button; you can also Edit Client from the Client's page!

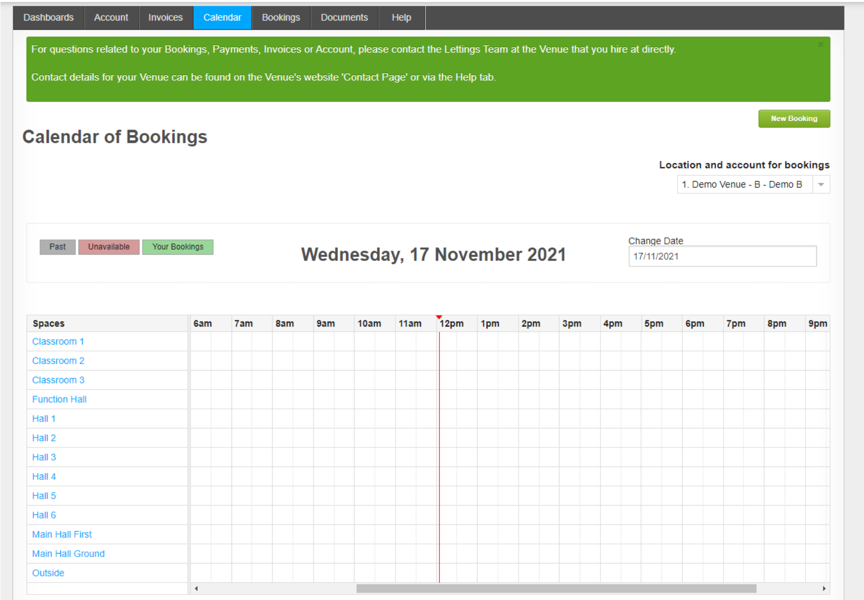
This doesn't mean that the Clients are fixed to these rates. You can still make changes on particular bookings when creating or editing a booking. For more on adjusting the VAT on a booking, click here.

Display calendar tab to clients

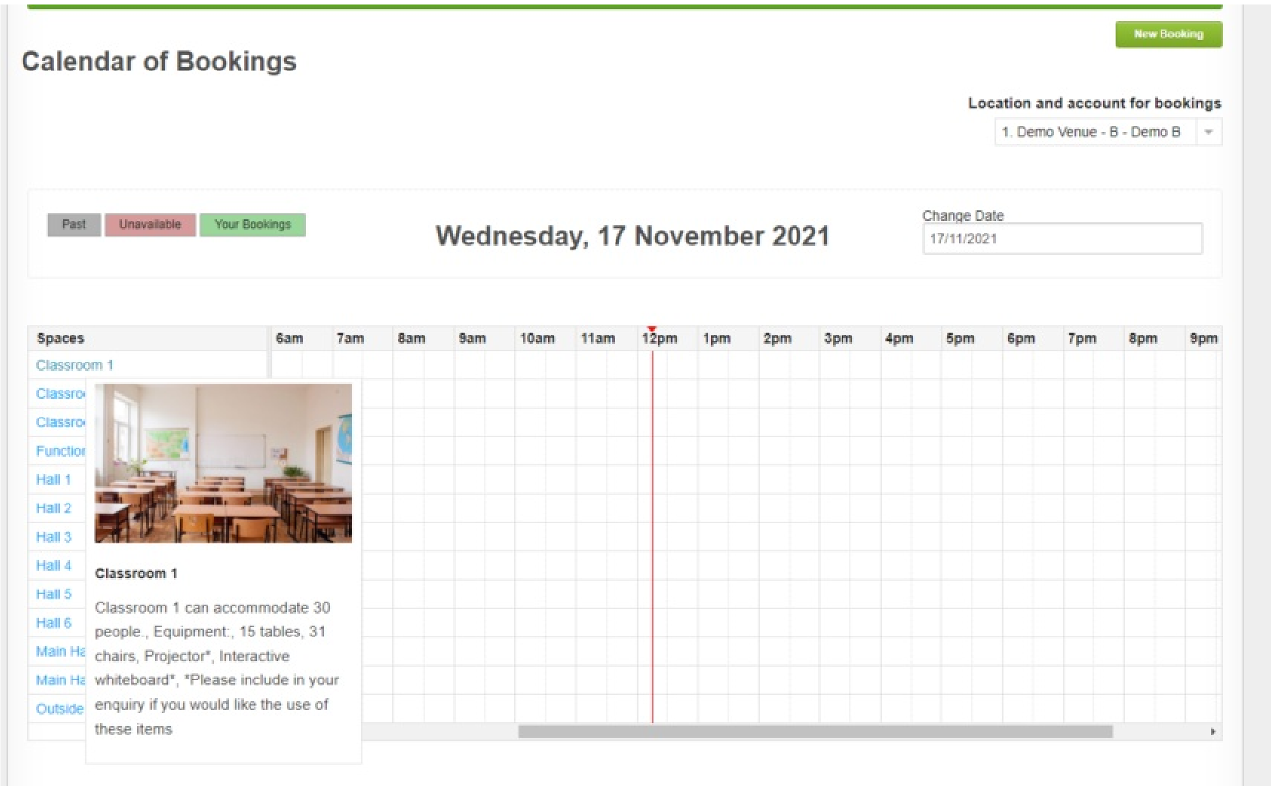
Last Modified on 17/11/2021 12:54 pm GMT

Within BookingsPlus there is the option to allow your clients to view your venue's calendar without them having the ability to make their own bookings. This permits clients to see their own bookings and what slots are or are not available, before contacting the venue to request a new booking, saving you time.

When the calendar is set up at your venue, all of your current clients will be able to see your bookable spaces.

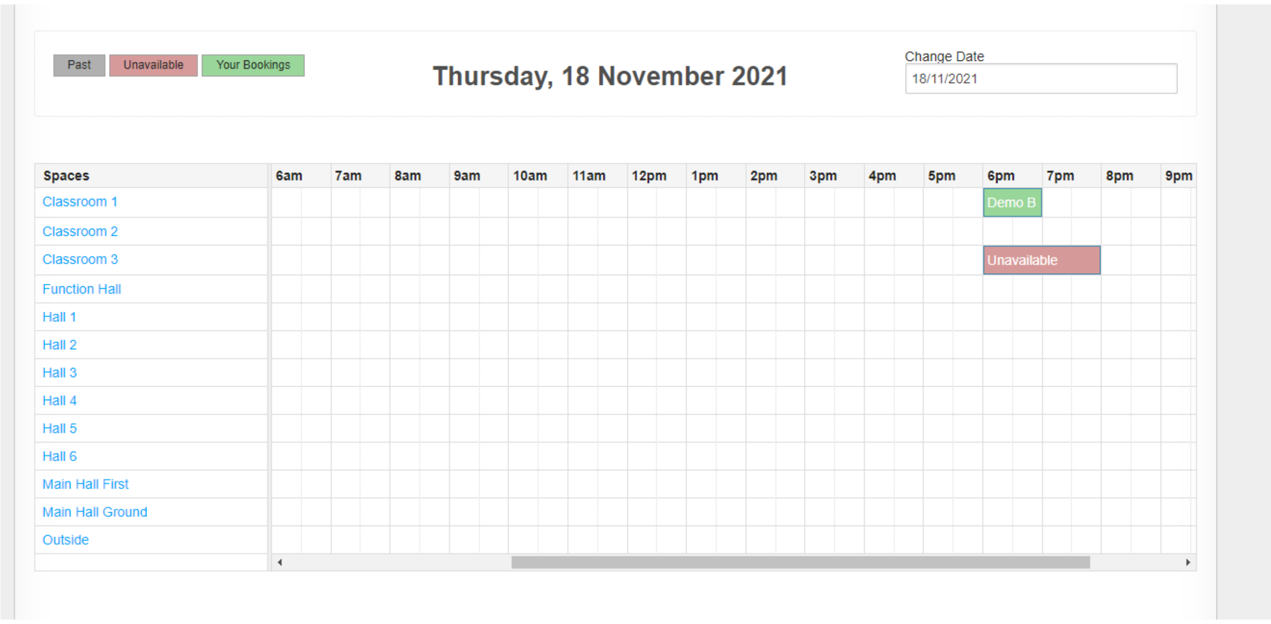


When they hover over the space they will be able to see images and notes saved to the space.

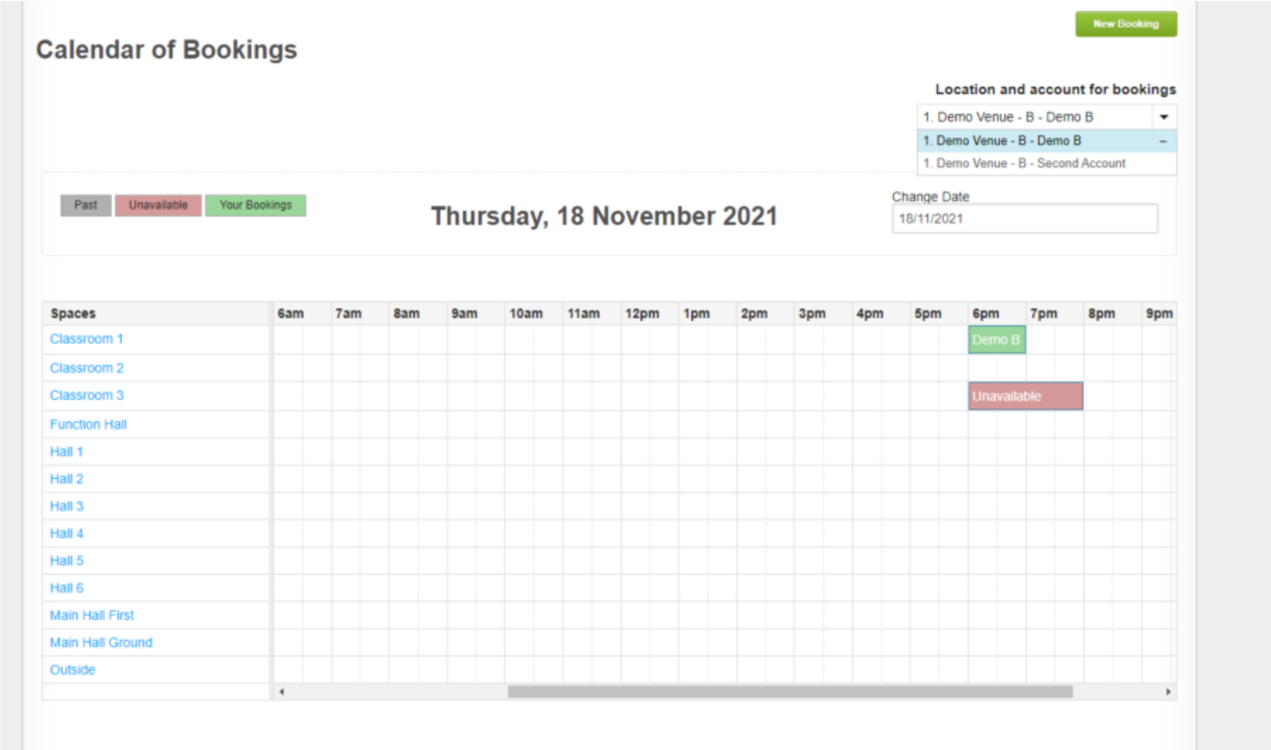


Before opting for clients to see the calendar, it is worthwhile going through each bookable space and ensuring you are happy with the Notes and images that will display. You can do this from the **Manage Tab – Venue Management – Bookable spaces - Edit**

Clients will be able to see their own bookings highlighted in green on the calendar. Any other client's bookings will simply show as 'Unavailable', highlighted in red.



If the user has access to multiple client accounts, they can switch account here:



Once the user has viewed availability and would like to get in touch regarding a new booking, they can email you via the New Booking Button at the top right of the page

If you would like to allow certain clients to be able to make their own bookings from their client login, take a look at our article on self-service options for clients here

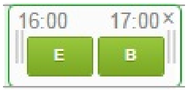
Make a provisional booking

Last Modified on 02/11/2020 4:48 pm GMT

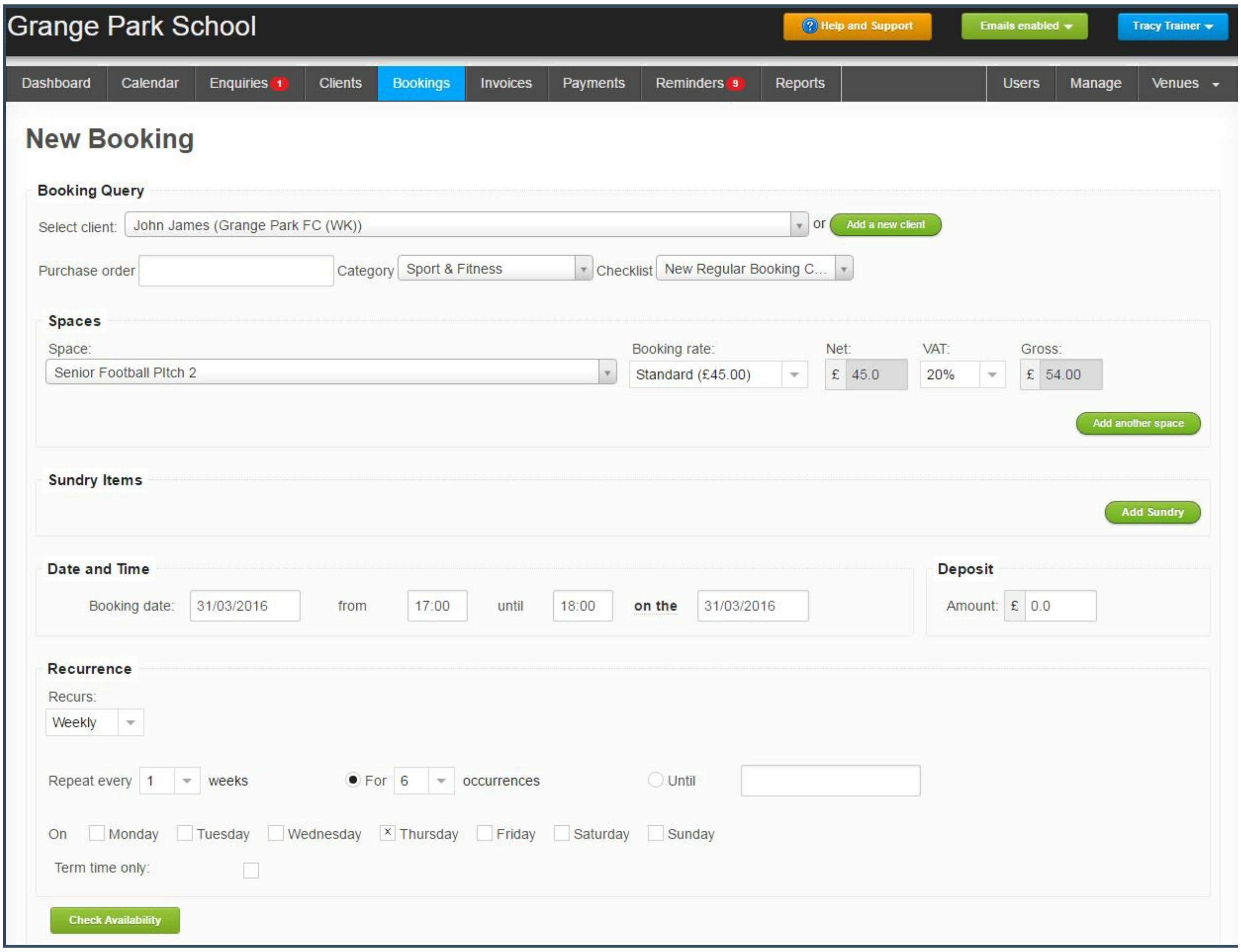
It's time to make a booking!

If you've had an Enquiry, then simply click on 

All of the information below will be carried forward.

If it's for an existing hirer, select the space & date/time from the calendar & click **B** 

. The booking form will open as below.



- Booking Query

- Select client from drop down box. For new clients, click 

populate and Save.

- Purchase Order - will appear on the invoice (a separate invoice for each purchase order number is generated)

- Category - allows you to tag each booking. This shows on the **Bookings** tab and Bookings Value Report and is helpful for analysis. It also allows you to easily identify when special events are booked!

- Checklist - adds a pre-set checklist to your booking (eg Regular Bookings, Special Events) - you can create these in the **Manage** tab.

- **Spaces**

    - This will be pre-filled from the Enquiry or Calendar. It can be amended if required.

    - Any additional spaces can be added via 

    - VAT will be set according to the Clients account (can be overridden if required)

- **Sundry Items**

    - Ideal for ad-hoc charges eg tea/coffees.

    - Note - the sundry will be replicated against each bookable space.

- **Date and Time**

    - Select date/time of first occurrence of the booking. Only make the 'On the' date the day after if the booking goes over midnight.

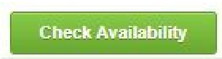
- **Deposit**

    - This field is purely a record of whether a deposit has been taken against a booking. It does not generate any financial entries.

- **Recurrence**

    - Option for daily/weekly occurrence, select as required

    - Click 'Term Time only' if required. This is based on the holiday dates predefined within your **Manage** area.

Now select 

Check Availability

Availability checked on: 31/3/2016

Booking Details

Edit selected | Cancel selected

		Space	Date	Time	Available	Rate	Net	Vat	Gross	Status	
	1	Senior Football Pitch 2	31/03/2016	18:00-19:00	Yes	£45.00	£45.00	20 %	£54.00	Unbilled	
	2	Senior Football Pitch 2 (booked by: Football Fanatics #87060 18:00-19:00)	07/04/2016	18:00-19:00	No	£45.00	£45.00	20 %	£54.00	Unbilled	
	3	Senior Football Pitch 2	14/04/2016	18:00-19:00	Yes	£45.00	£45.00	20 %	£54.00	Unbilled	
	4	Senior Football Pitch 2	21/04/2016	18:00-19:00	Yes	£45.00	£45.00	20 %	£54.00	Unbilled	
	5	Senior Football Pitch 2	28/04/2016	18:00-19:00	Yes	£45.00	£45.00	20 %	£54.00	Unbilled	
	6	Senior Football Pitch 2	05/05/2016	18:00-19:00	Yes	£45.00	£45.00	20 %	£54.00	Unbilled	
		Total 6		6h			£270.00		£324.00		

Check Availability Across Venues | Toggle Options

The table gives you a clear guide to the availability across the sessions requested. Dates appearing in Green are available, Dates in Red are either already booked by another client or the venue is closed (the narrative will explain).

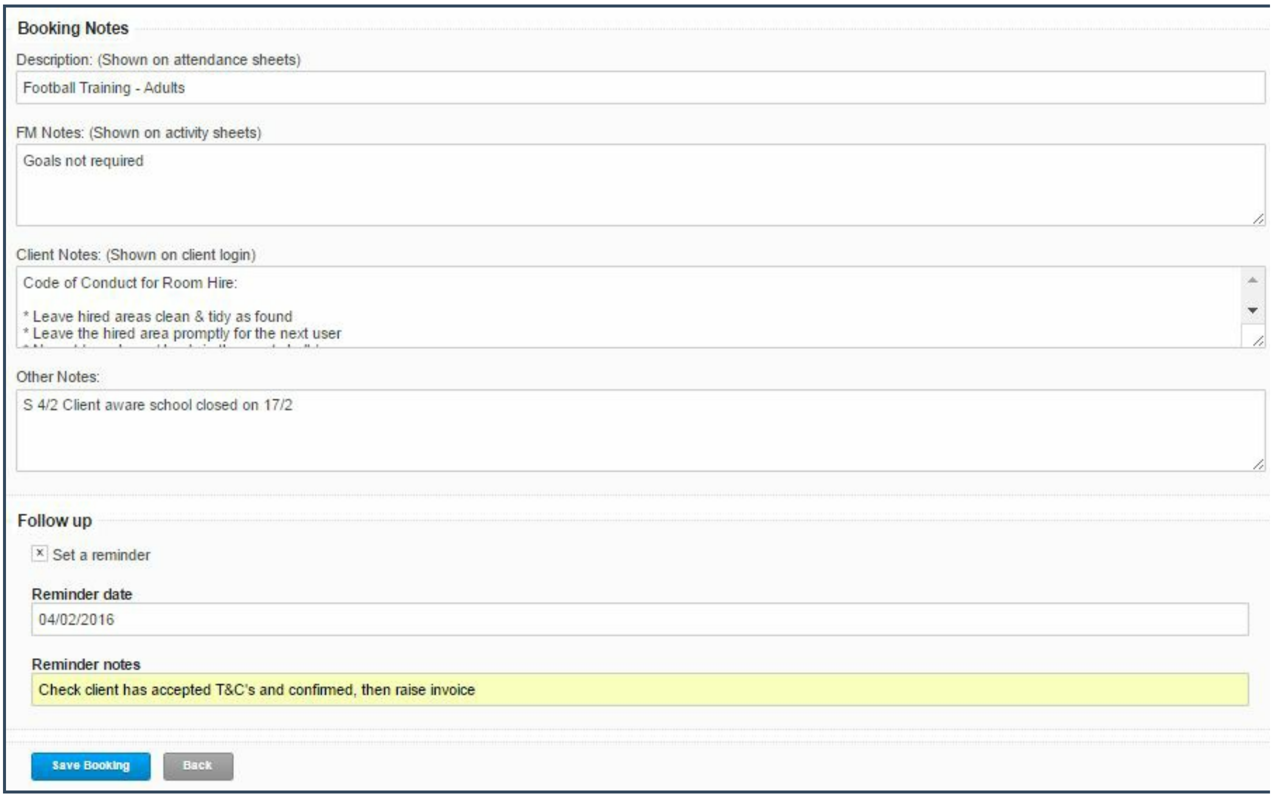
Dates can be cancelled by clicking on the red cross to the right (for single line), or by ticking box on left of line & selecting Cancel selected

Editing can be done at single line level by clicking on the , or ticking box on left of line & selecting Edit selected

Select item to be edited (space or times) and click on This will change all of the selected items to the amended fields.

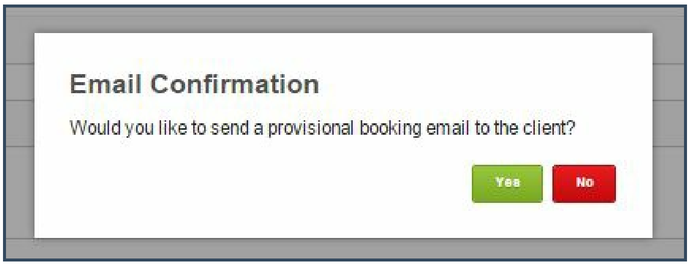
See Check Availability across Venues

Once the booking dates/times have been availability checked, complete the bottom section of the booking form, providing as much information as possible.



Once you click 

, you will have the option to send a Provisional Booking email.



If you click to send a Provisional Booking email, it will also generate a Welcome Email which contains a password & log-in instructions. See Welcome Email for further information.

For next steps on how to confirm a booking see Confirm a Booking

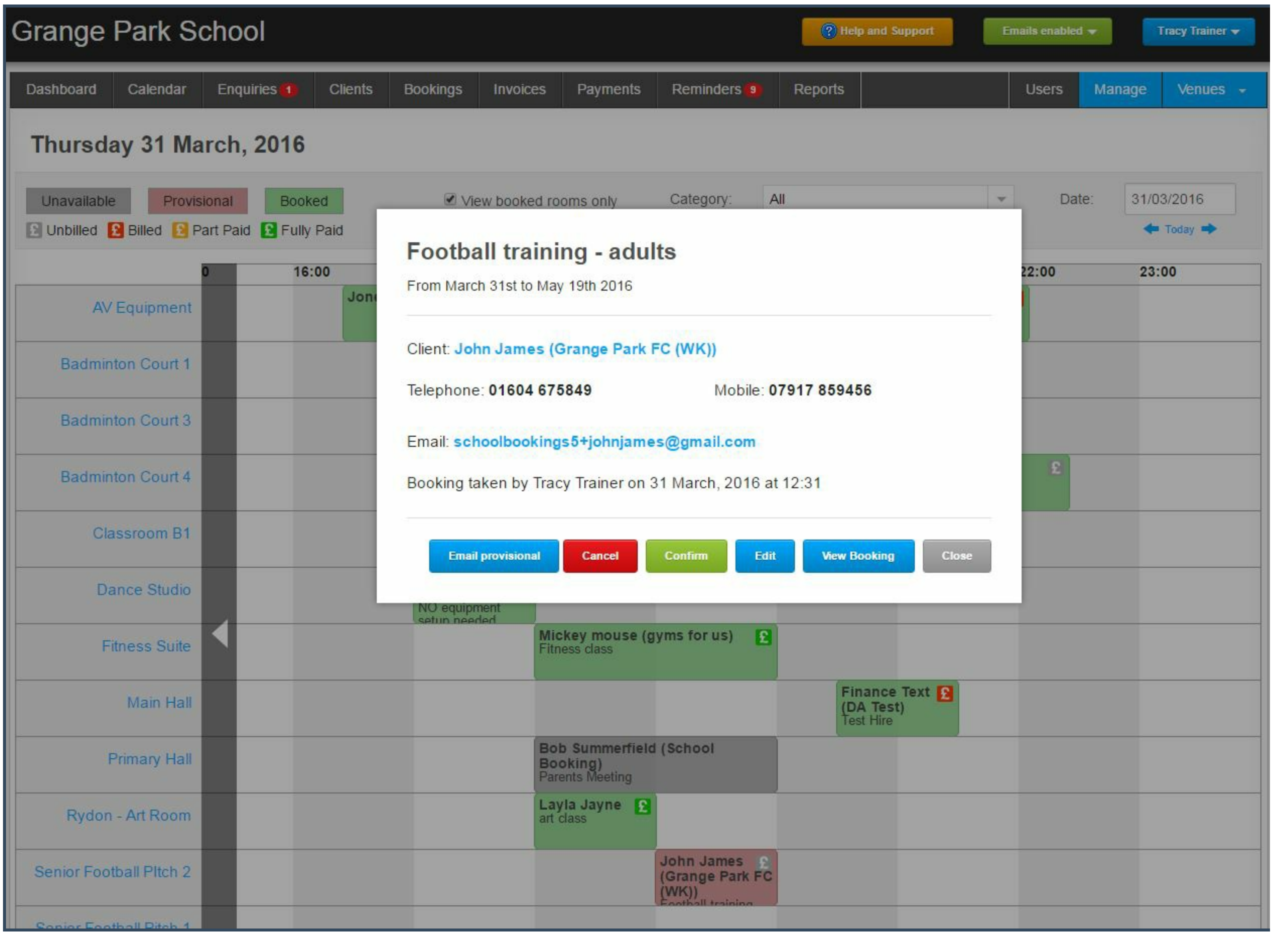
Confirm a booking

Last Modified on 02/11/2020 4:50 pm GMT

Once you've got a Provisional booking in the calendar, it needs to be confirmed in order for it to appear on your Activity/Attendance reports for site staff & also to raise an invoice.

Best practice is for your hirers to confirm their own bookings, this means they have to accept the T&C's before they can proceed & also ensures that they take responsibility for checking their bookings. When you make the provisional booking, you are able to send an automated email to the hirer to let them know they have a booking to confirm. Click here to see Hirers process to confirm a booking

There may be cases when you need to confirm a booking. To do this, locate the booking - either from the [**Calendar**] or [**Client**] tab.



Once you've clicked on the booking, a pop-up box will appear with options.

Click on the  button & you will be given the option to either confirm the whole booking or just one occurrence. When you've chosen the option, another pop-up appears.

By sending the email, they will receive a generic email stating they have a confirmed booking, with a link to their account.

Non-Billable client

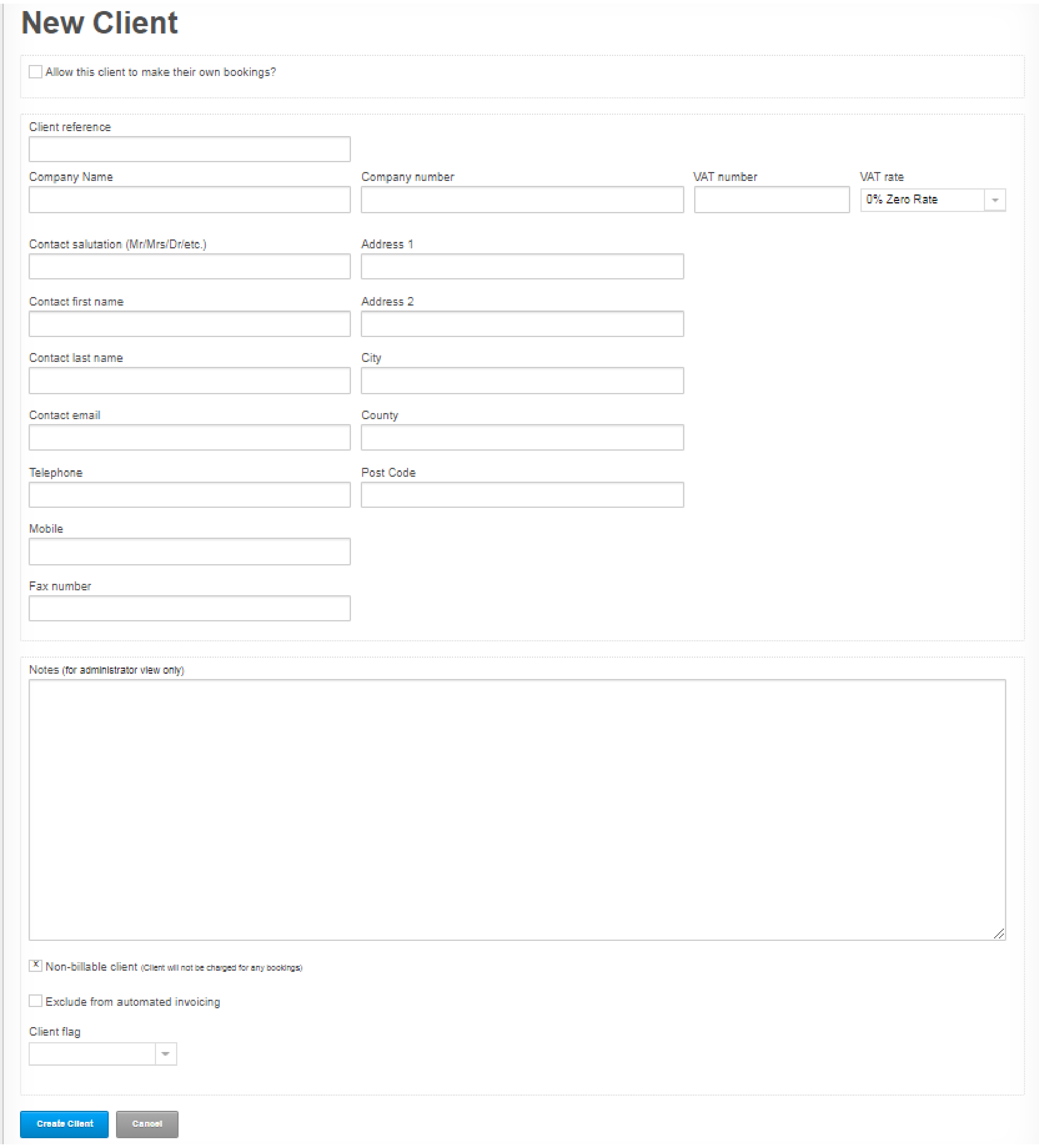
Last Modified on 02/11/2020 4:54 pm GMT

There is an option in BookingsPlus to create a Non-Billable client.

Any bookings which do not need to be charged for during opening hours need to be added to BookingsPlus to limit disruption and to ensure Administrators and Site Staff are fully aware of what is happening in the venue.

If required, there can be a number of Non-Billable Clients e.g. Maintenance, Parents Evenings, Performances etc. Just think about the analysis which will be required from the system.

When a client is set up or edited, you'll notice there's a box at the bottom of the page to select if you are creating a Non-Billable client. This will mean that the booking is non-chargeable & will show up in Grey on the calendar.

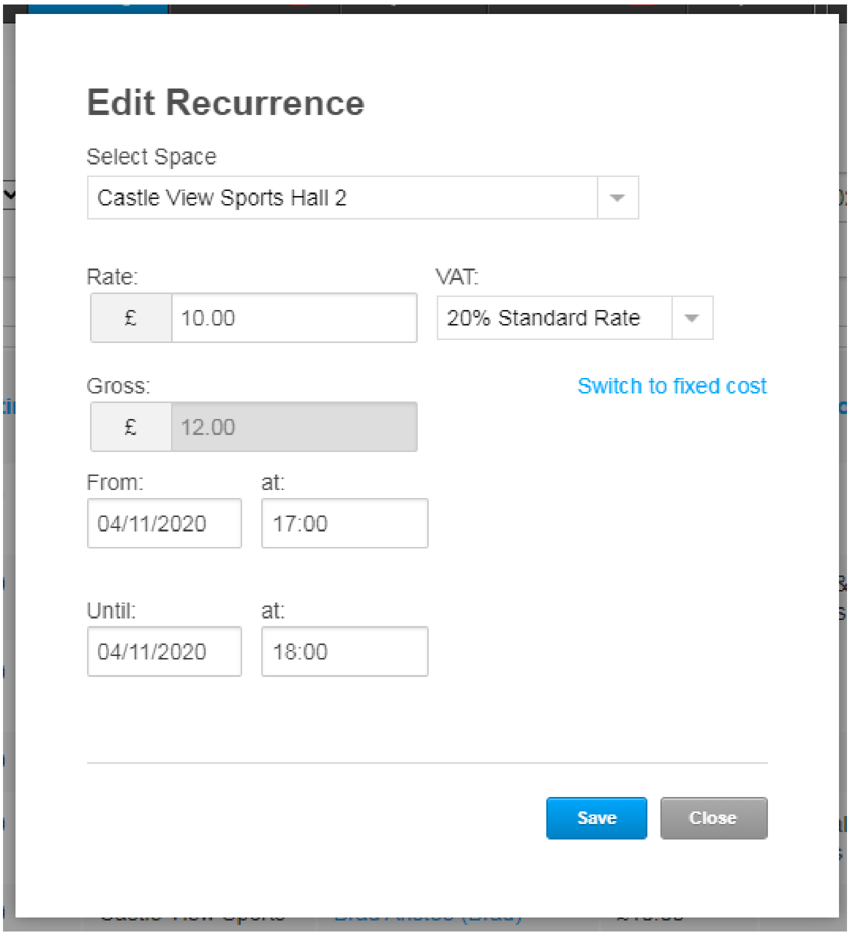

New Client
Allow this client to make their own bookings?
Client reference
Company Name
Company number
VAT number
VAT rate
0% Zero Rate
Contact salutation (Mr/Mrs/Dr/etc.)
Address 1
Contact first name
Address 2
Contact last name
City
Contact email
County
Telephone
Post Code
Mobile
Fax number
Notes (for administrator view only)
Non-billable client (Client will not be charged for any bookings)
Exclude from automated invoicing
Client flag
Create Client
Cancel

Editing a booking

Last Modified on 02/11/2020 5:08 pm GMT

As bookings rarely stay the same, we've made it really easy to edit a booking in BookingsPlus.

There are a number of ways to do this - firstly, if you are only looking to edit one occurrence, you can do so via the Calendar or Bookings tab. On the Calendar you can click on the occurrence, Click Edit, and 'This occurrence'. On the bookings tab you only need to click the edit button. For both you will see this popup:



From here you will be able to amend the field needed, and click Save.

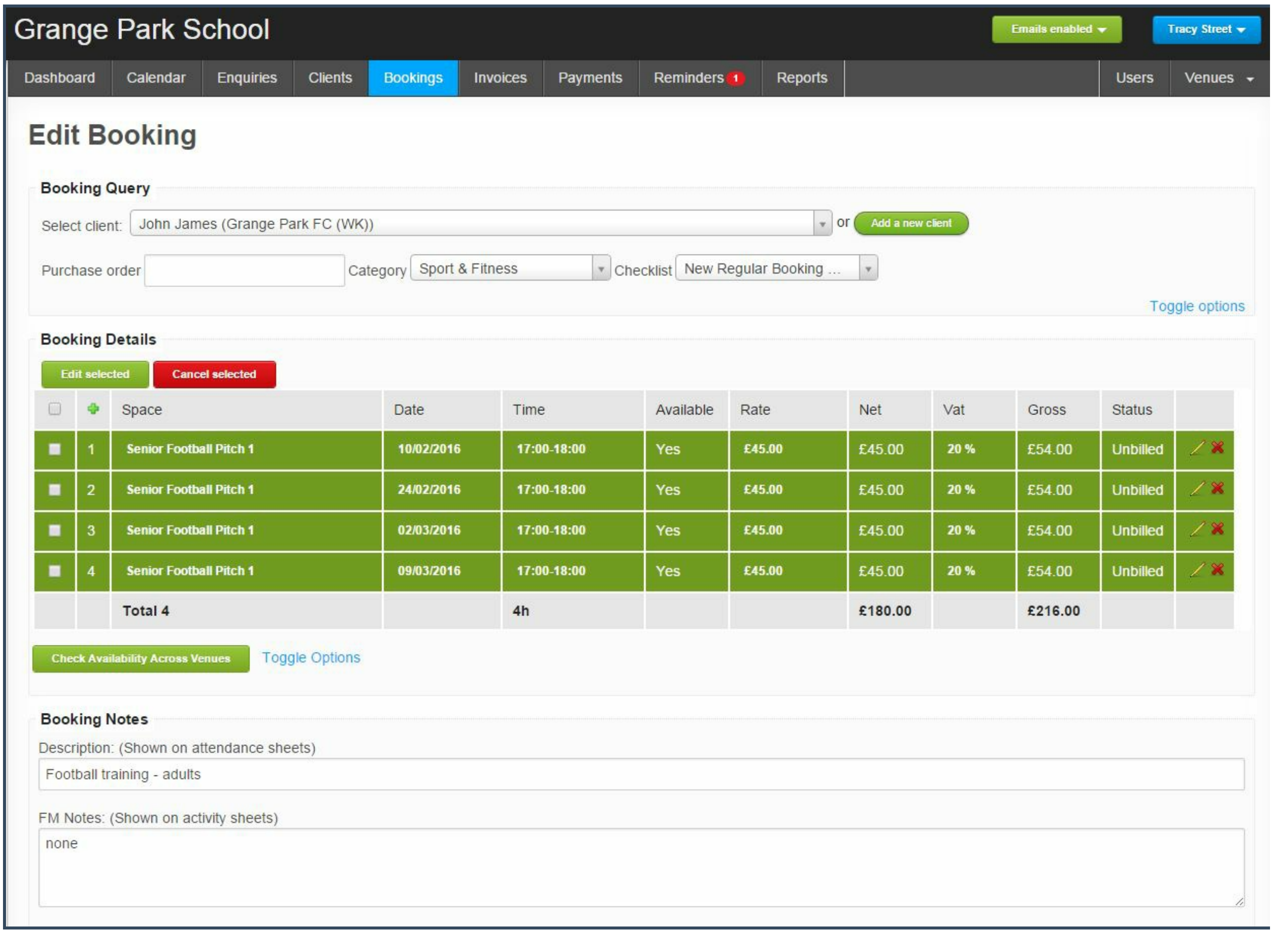
If you need to amend many occurrences of the same booking, there are 3 ways to get to the **Edit Booking** page:

- Through the **Calendar** tab, Select one of the occurrences, **Edit**, **Edit the whole booking**

- **Clients** tab, Search the Client, Click **View**, scroll to the bottom of the page & click on the relevant booking. Click the **Edit** button at the bottom of the page.

- **Bookings** tab, Click on a Booking Reference ID hyperlink and click the **Edit** button at the bottom of the page.

You will then see this screen.



At the top right of the green table is a link to **Toggle Options**, this will return to the original booking information (date/time/spaces). If this information is updated & refreshed, it will refresh the green table. This is **not** recommended - it will mean that any changes which had been done from within the green table would be reset.

Any changes can easily be done from within the green table.

To amend a single line, click on the pencil icon  and the line will convert allowing you to amend any of the variables. Once done, click on the  to confirm.

If you need to amend a number of lines, simply click on the tick box on the left for each session you wish to amend, click on  and amend the drop down boxes as needed. Once you've finished click  and it will update all the selected lines. Please note that all lines you have selected will be updated with all information in the Edit Selected area so you need to make sure that you have chosen bookings with the same room, and that you are happy that all other information should be replaced.

Note - if any spaces are unavailable at this stage (either closure or already booked), they will show in red.

Once done, scroll to the bottom & click .

***TIP* -** for a full audit trail, it's best to record the changes you've made to the booking. This can easily be done on the Other Notes section within the booking (this does not appear on the hirers view).

Cancel a booking

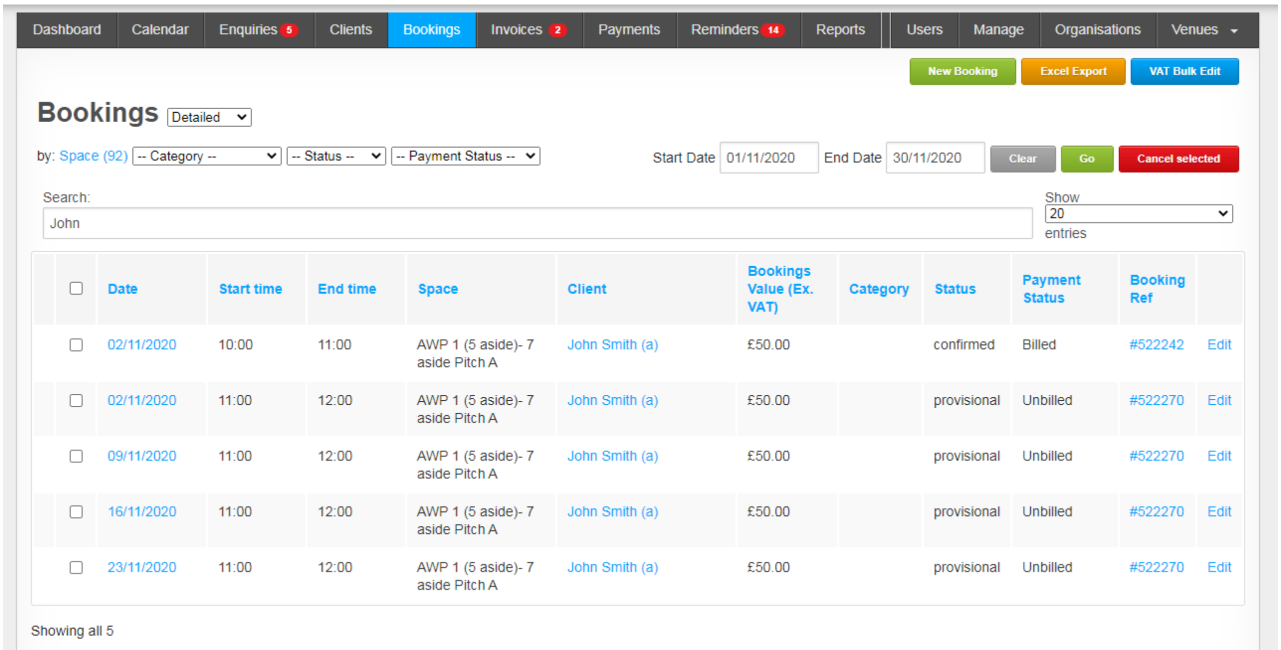
Last Modified on 02/11/2020 5:26 pm GMT

There are a number of ways to cancel a Hirer's booking within BookingsPlus. This is our recommended way - it does all the cancellations, communication & credit notes (if required) in just a few clicks, meaning it's easy for you. It's also easily understood for the Hirer.

Select the **Bookings** tab.

Amend Start Date 01/11/2020 End Date 30/11/2020 to include the dates you are wishing to cancel.

Type your hirer's name in the search box (make sure it's the correct client incase you have a few with similar names!) and click **Go.**

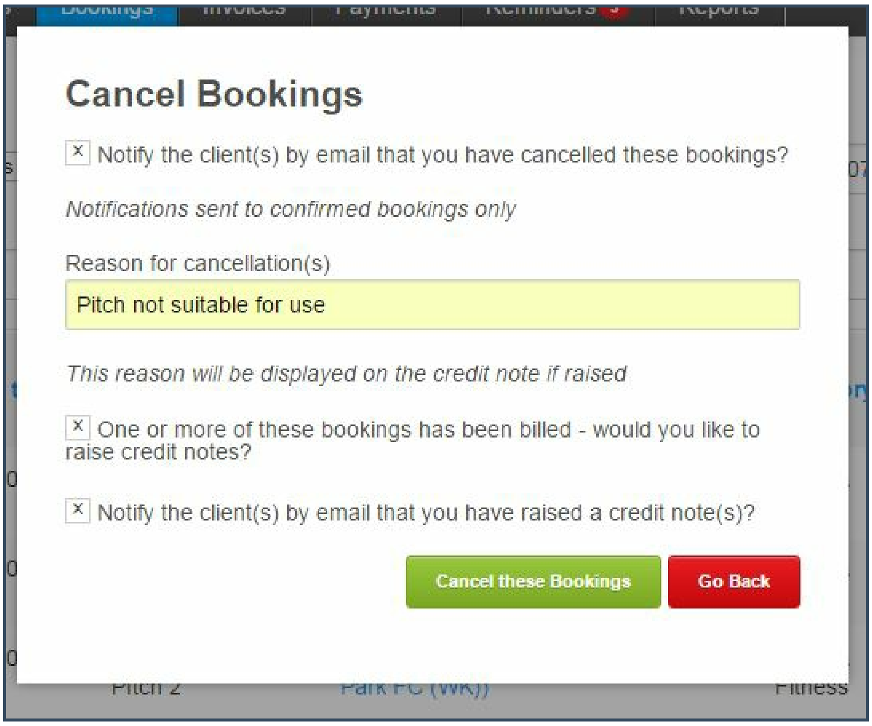


	Date	Start time	End time	Space	Client	Bookings Value (Ex. VAT)	Category	Status	Payment Status	Booking Ref	
☐	02/11/2020	10:00	11:00	AWP 1 (5 aside)- 7 aside Pitch A	John Smith (a)	£50.00		confirmed	Billed	#522242	Edit
☐	02/11/2020	11:00	12:00	AWP 1 (5 aside)- 7 aside Pitch A	John Smith (a)	£50.00		provisional	Unbilled	#522270	Edit
☐	09/11/2020	11:00	12:00	AWP 1 (5 aside)- 7 aside Pitch A	John Smith (a)	£50.00		provisional	Unbilled	#522270	Edit
☐	16/11/2020	11:00	12:00	AWP 1 (5 aside)- 7 aside Pitch A	John Smith (a)	£50.00		provisional	Unbilled	#522270	Edit
☐	23/11/2020	11:00	12:00	AWP 1 (5 aside)- 7 aside Pitch A	John Smith (a)	£50.00		provisional	Unbilled	#522270	Edit

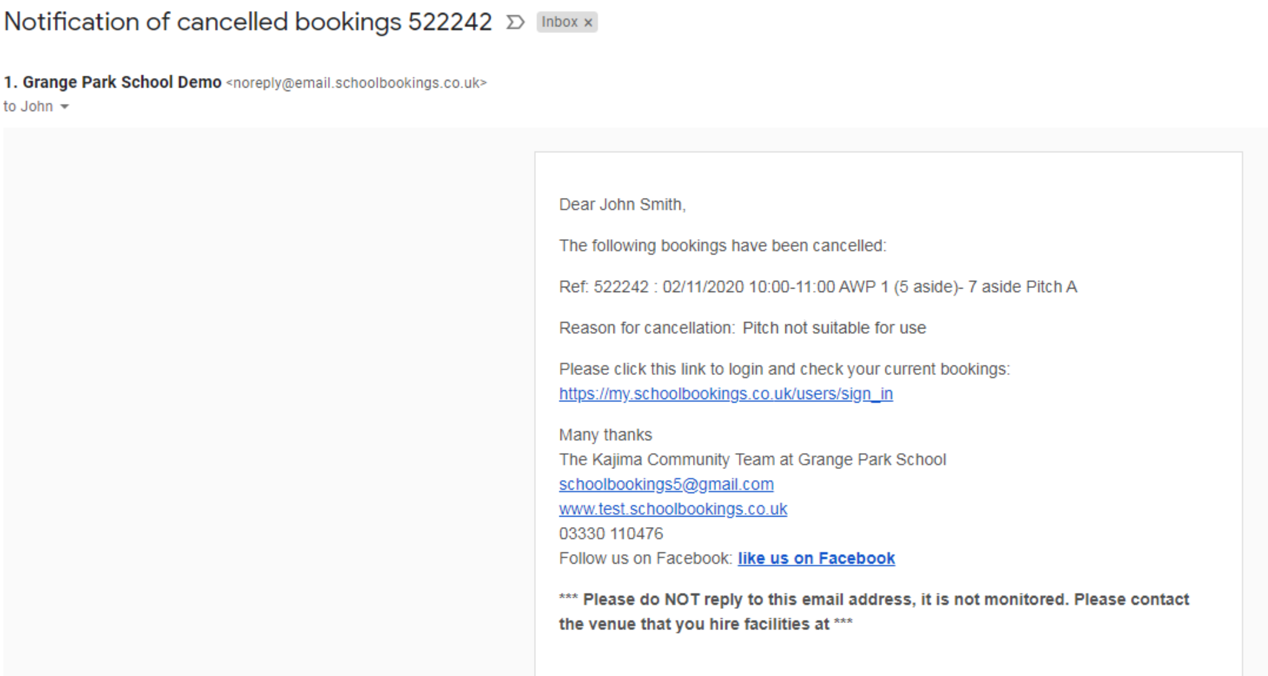
Tick the boxes for the bookings you wish to cancel. *Note - if there are more than 20 bookings, click to show 50 or 100 entries.*

Click the Cancel selected button.

You will then see a pop-up allowing you to notify the customer and raise credit notes for any bookings that are Invoiced.



If you select to notify client by email, they will receive an itemised cancellation email (example below).This email is based on the standard text for your venue. It may be appropriate to amend this email for this specific occasion. See Amend Automated Emails for assistance on how to do this.


Notification of cancelled bookings 522242 Inbox x

1. Grange Park School Demo <noreply@email.schoolbookings.co.uk>
to John

Dear John Smith,

The following bookings have been cancelled:

Ref: 522242 : 02/11/2020 10:00-11:00 AWP 1 (5 aside)- 7 aside Pitch A

Reason for cancellation: Pitch not suitable for use

Please click this link to login and check your current bookings:
https://my.schoolbookings.co.uk/users/sign_in

Many thanks
The Kajima Community Team at Grange Park School
schoolbookings5@gmail.com
www.test.schoolbookings.co.uk
03330 110476
Follow us on Facebook: **like us on Facebook**

***** Please do NOT reply to this email address, it is not monitored. Please contact the venue that you hire facilities at *****

If any of the bookings are billed, an option to raise credit notes is given. This raises one credit note per customer (showing all the cancelled bookings).

If a credit note is raised, this will be shown on screen & you will be able to allocate it directly to an invoice.

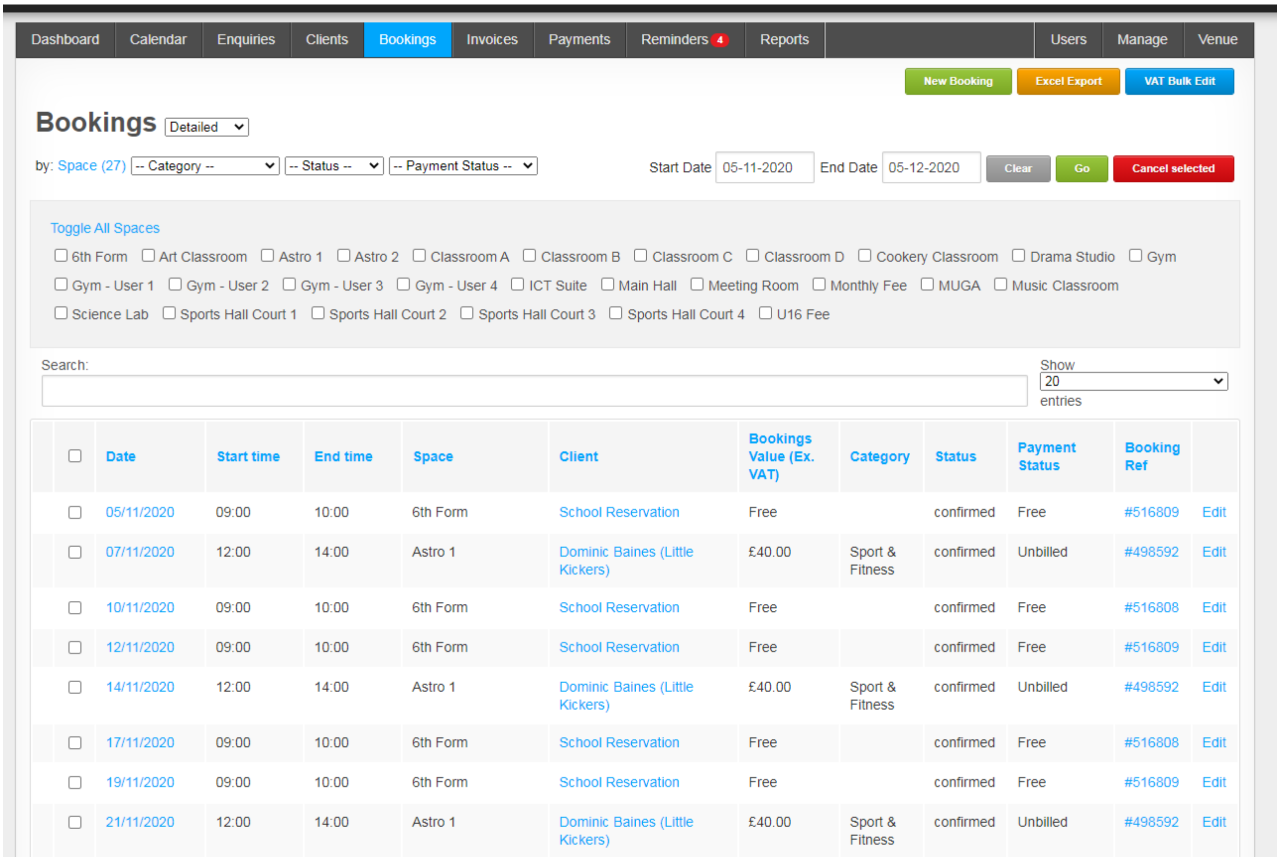
If you choose to not Credit note an Invoiced booking, once cancelled, it will show on the bookings tab. This will be shown by a  on the left hand side. It will also still show on the Bookings Value Report with the Status Cancelled.

Bulk cancel bookings

Last Modified on 05/11/2020 5:01 pm GMT

What happens if you need to cancel all your bookings tonight due to snow? Or maybe your Sports Hall is out of use for a week while the floor is sanded? No problem!
In BookingsPlus you can cancel the bookings & raise the credits with just a few clicks.

Click on the **Bookings**tab. This tab allows you to view the bookings for your venue & filter by many different criteria. It defaults to show a one month view, but the start/end dates can be amended as required.



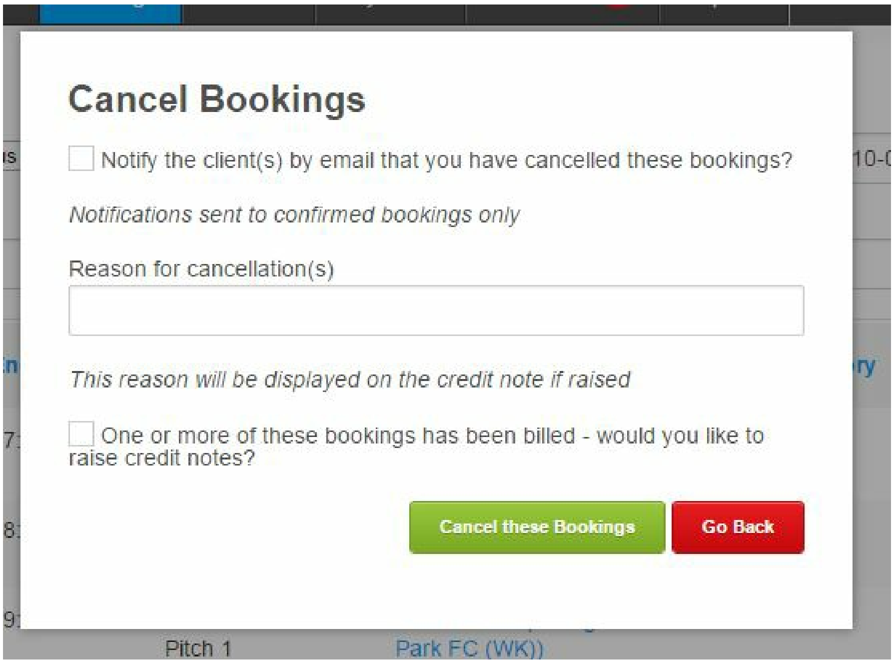
Let's use the Sports Hall floor scenario.....

Click on by: Space (27) this will allow you to select which facilities you need to retrieve bookings for.

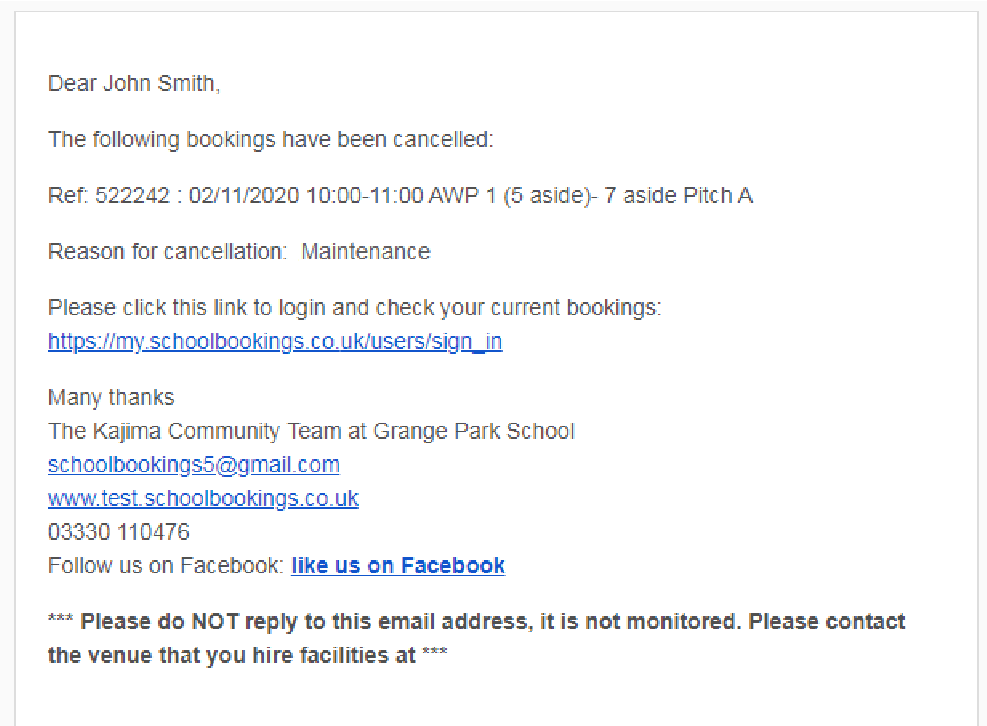
Amend Start Date 05-11-2020 End Date 05-12-2020 and click Go

The table below will then show all the bookings for the Sports Hall within the time period you selected. At this point, amend the Show 20 entries to make sure it shows 100 entries

From here, simply tick the box by the date column to select all the bookings & click Cancel selected . A pop-up box will allow you options to communicate & credit the hirer.



If you select to Notify the Client, an automated email will be sent to the hirer listing out the bookings which have been cancelled. The wording of this email is specific to your venue & is updated in the 'Manage' area of your system (example below).



Dear John Smith,

The following bookings have been cancelled:

Ref: 522242 : 02/11/2020 10:00-11:00 AWP 1 (5 aside)- 7 aside Pitch A

Reason for cancellation: Maintenance

Please click this link to login and check your current bookings:
https://my.schoolbookings.co.uk/users/sign_in

Many thanks
The Kajima Community Team at Grange Park School
schoolbookings5@gmail.com
www.test.schoolbookings.co.uk
03330 110476
Follow us on Facebook: **like us on Facebook**

*** **Please do NOT reply to this email address, it is not monitored. Please contact the venue that you hire facilities at** ***

Consider whether you need to supply more information regarding the cancellation - click here to see how the amend the wording. Amend automated emails.

Select whether you wish to raise credit notes.

Once complete, click 

, all the bookings will be cancelled & automated emails sent.

If any of the bookings were billed, you will be taken to the **Invoices** tab, where the credit notes will be listed. From here, they can be individually allocated to outstanding invoices.

TIP If you were cancelling bookings due to venue being closed (ie Open Evenings etc), be sure to put a closure in the 'Manage' section to prevent any bookings being taken. For help with this, see Holidays & Closures.

Once cancelled, an invoiced booking without a credit note will show on the bookings tab. This will be shown by a  on the left hand side.

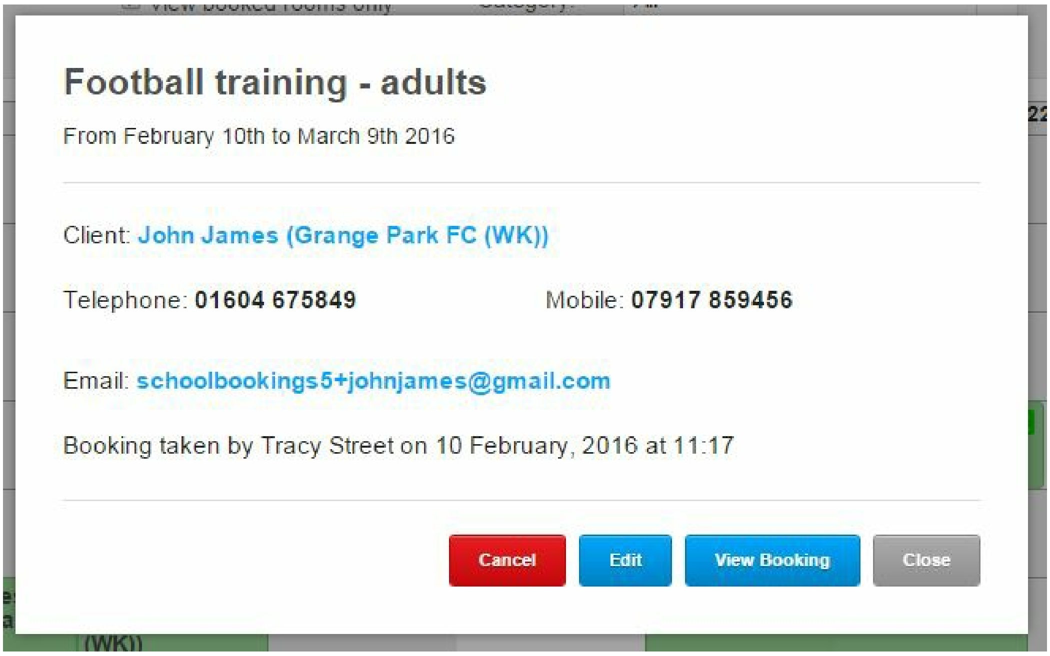
Cancel a booking from the calendar

Last Modified on 06/11/2020 9:36 am GMT

You are able to cancel bookings directly from the **Calendar** tab. There's a few things to bear in mind when using this method, so the examples below will illustrate this.

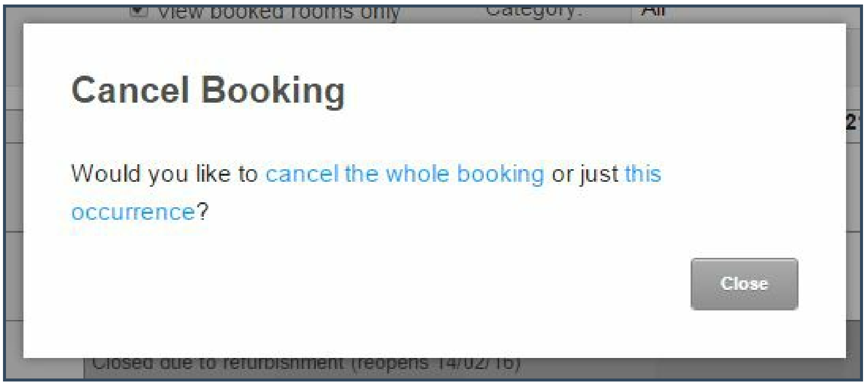
TIP - the recommended cancellation method is via the **Bookings** tab. Click here to see Cancel a Booking

From the **Calendar** tab, click on the booking you wish to cancel.

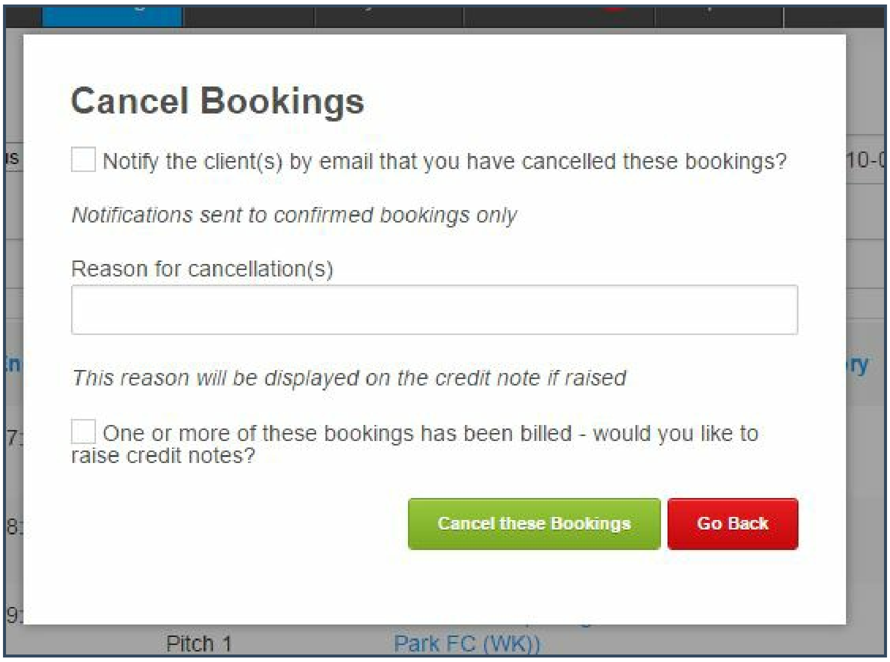


Click 

and a pop-up will appear whether you wish to delete.

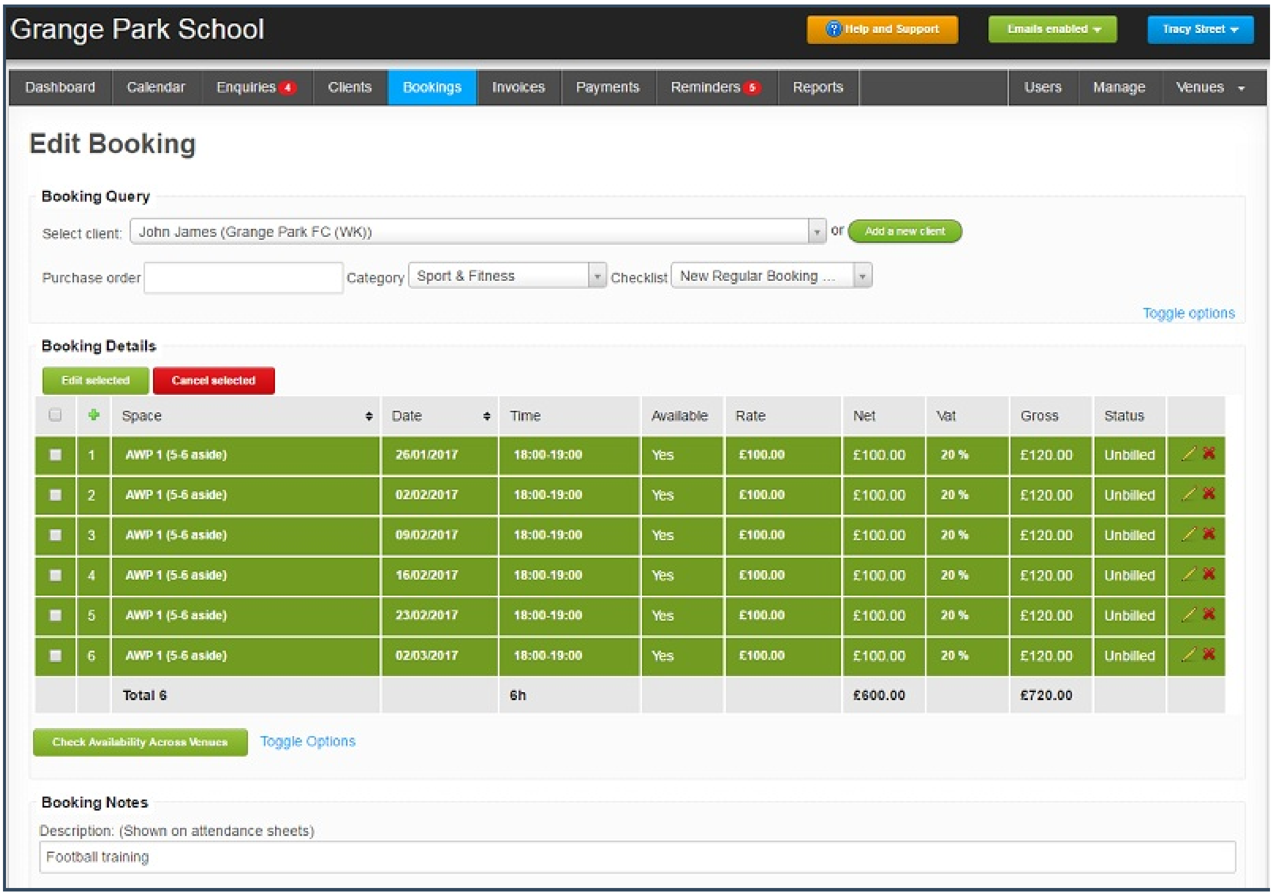


If 'this occurrence' is selected, the pop-up below will appear, allowing you to communicate the cancellation to your client (confirmed bookings only).



If 'cancel the whole booking' is selected, you will be taken to the Edit Booking page. At this point, you can select the bookings you wish to cancel by ticking the box on the left hand side of the green table. Once complete, click 

.



The cancellations pop-up will then appear, allowing you to communicate the changes with your client & give credit notes if appropriate.

Renewing a booking

Last Modified on 06/11/2020 9:38 am GMT

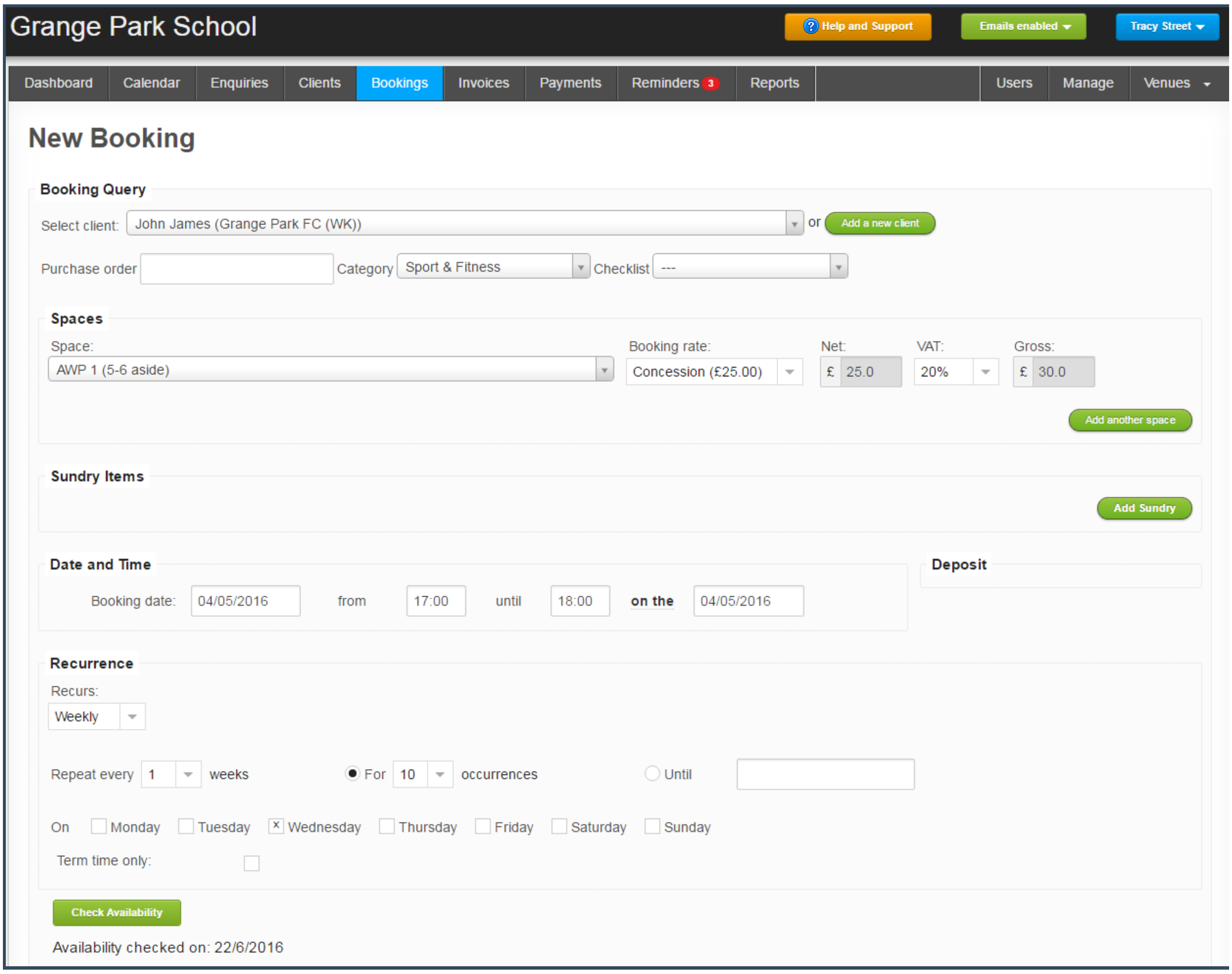
Once a booking comes to the end of it's recurrence, you will need to renew it for the hirer to continue their lettings. We've developed a renewals function, which allows you to select the current booking, click to renew and the booking form will be pre-populated with all the existing information.

To access this, click to 

a booking (either via Calendar or Clients account). This will bring you to the booking form, at the bottom right of the booking form click 

.

The booking form will open up. As you can see in the example below, it is pre-populated with all the information from the last booking, including categories, checklists, pricing etc.



From this screen, you can add the new date range and check availability. Any price increases to standard rates since the original booking will be reflected in the new booking.

You can then proceed to save your booking & issue the provisional booking email to the client.

Don't forget to publish to your website if required. See Publish an event on What's On page

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Editing a Billed Booking

Last Modified on 03/02/2021 5:32 pm GMT

There may be occasions whereby amendments need to be made to a booking after it has been invoiced.

You will notice that on a Billed Booking you can only change the room so a few steps need to be taken in order to be able to edit it.

Firstly, you will need to check which Invoice your booking has been invoiced on. An easy way to do this is to click onto the [**Clients]** tab and locate the client, then click View. Click on the booking at the bottom of the page. You will notice at the end of the line of the booking the Payment status will either say 'Fully paid' or 'Billed' depending on whether or not it has been paid. This will be a blue link and by clicking on this it will take you to the invoice.

At this point you will want to check if any Credit notes or Payments have been allocated against the invoice. You can see this by scrolling to the bottom of the invoice.

Date	Description	Space	Time	Net Cost	VAT Rate	VAT Payable	Gross Cost
07/09/2016	Football	AWP 3 (5-6 aside)	19:00 - 20:00	£35.00	20%	£7.00	£42.00
14/09/2016	Football	AWP 3 (5-6 aside)	19:00 - 20:00	£35.00	20%	£7.00	£42.00
21/09/2016	Football	AWP 3 (5-6 aside)	19:00 - 20:00	£35.00	20%	£7.00	£42.00
28/09/2016	Football	AWP 3 (5-6 aside)	19:00 - 20:00	£35.00	20%	£7.00	£42.00
						Net Total:	**£140.00**
						VAT:	**£28.00**
						Grand total:	**£168.00**

Payment Terms

PAYMENT TERMS: Payment is due by the first booked date in the invoice for regular bookings and 1 month in advance for special events.
PAYMENT ACCEPTED:
GoCardless: Preferred method
BACS: HSBC, sort code 40-50-60, Account 4056784 (quote invoice number as ref)
Cheque: payable to Grange Park School

Registered Office: Grange Park School, 63 Home Drive, London, W1U 8EW • Company Number: 123456 • VAT Number: 4562 1235 4562

Payments Applied:

- **£137.00** allocated from payment #71408 on 27/09/2016 (Remove)

Credit Notes Applied:

- **£31.00** allocated from credit note CN_GP736 on 27/09/2016 (Remove)

To unallocate the payment click Remove next to it on the Invoice. You will need to unallocate all payments because you cannot void a Invoice with anything allocated to it.

With the Credit notes, you will need to look at are the credit notes allocated the invoice referring to bookings listed on the invoice? You must ensure that they are, as you will be voiding the invoice so the canceled bookings will not be picked up. Therefore, after checking the bookings on the credit note do relate to bookings listed on the invoice, you will need to Void the Credit note. To do this go back into the client account, locate the credit note, click on it and click the red void button.

If the bookings listed on the credit note do not match bookings listed on the invoice just unallocate it via the invoice.

Once all credit notes and payments have been unallocated or voided you can now void the invoice. This is done by clicking on the invoice and clicking void.

You will then need to click on the Booking to edit. For advice on this please see our article on how to edit a booking.

Once the booking has been edited it is important to re-invoice and re-allocate any payments to any remaining bookings in that billing period.

Best way to invoice these bookings is by clicking the invoice button at the bottom of the clients page. Once generated simply click to allocate the correct payment against it and click save.

Depending on whether the booking edit increased or decreased the value you pay have an outstanding balance or the invoice or the account may now be in Credit. If there is an outstanding balance the invoice will now appear on the clients log in as an Outstanding invoice.

If their account is now in credit, depending on what type of bookings they have will change what you will need to do next. If this is a one off booking, after the Booking date you will need to create a refund and ask your finance team to send them the amount in credit back. However if the bookings are ongoing you can simply allocate the remaining amount to the next invoice.

Invoiced bookings cancelled in error

Last Modified on 03/02/2021 5:33 pm GMT

If a past booking is accidentally cancelled it is likely to have been invoiced and paid. Unfortunately in the system there is no undo button so the bookings will need to be reinstated.

If a booking has been accidentally cancelled from the system the first thing to check is if a credit note has been raised.

If a credit note has been raised this means the bookings value for that booking will match up against the invoice. In this case put the booking back in and confirm it (opt not to send confirmations to the customer to avoid confusion). You will now need to unallocate the credit note and any payments from the old invoice and click Void on the original invoice and credit note. Create a new invoice for the same date range as the original invoice and allocate the payment against it.

However if this is not the case there is a process you will need to follow in order to reinstate this booking, there will be invoices that match, and payments that link to the invoices.

Go to the Bookings tabs, filter by dates, search the clients name and change the filter 'Status' to 'Cancelled' to be able to see all bookings that were cancelled in error. It may then be useful to go to the [Clients] tab, click View and note down every invoice reference that relates to the cancelled bookings.

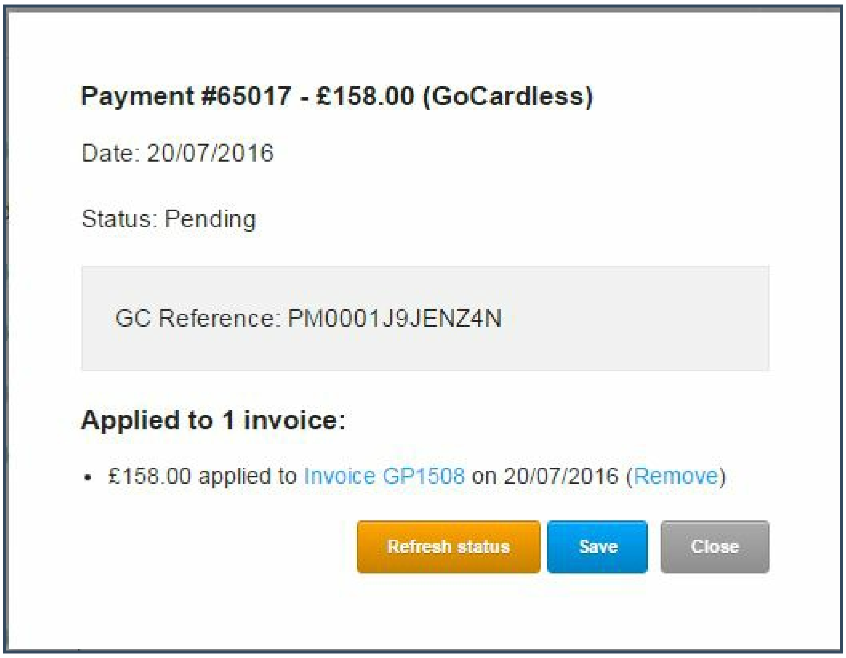
You will then want to put the bookings back in the system based on what was previously invoiced.

The easiest way to do this would be to go to the [Bookings] Tab, click New Booking and re-raise all deleted dates in one booking and click Save Booking . Please ensure all of the costs of the bookings match as they were previously invoiced. If you are planning on confirming these yourself we would advise not sending the provisional to the customer as this may create confusion if they are asked to confirm previously confirmed and invoiced dates.

You will then want to click on the booking and confirm it. You can do this from the calendar – click on one of the dates, click confirm, and confirm the whole booking. Again it is up to as the administrator if you send a notification to the client, as it may cause confusion.

You will notice now that the bookings will now say that they are un-billed. However as invoices will have been raised previously you will need to Void the old invoices in order to raise new invoices, so that they will link directly to the bookings.

The first step is to go to the clients account, click on all of the payments that link to the invoices you are wanting to void, and remove them by clicking Remove.



(SHOULD THIS IMAGE BE A PIC OF THE INVOICES NOT THE PAYMENT POP UP)

You will be able to see if this is successful as all payment that you have needed to remove will show as unallocated on the clients account.

You will then need to void the invoices.

Click on each invoice individually – at the bottom of each invoice there will be a red VOID button – click this and in the pop up write ‘Invoiced bookings deleted in error. Invoices to be re-raised’ and click save.

Now when you re-raise the invoices there will not be duplicate invoices billing a client for the same booking. Raise the invoices as they were originally raised – so for example if you invoice monthly you will need to raise separate invoices for all of Septembers and Octobers dates. This will ensure that the payments will match the invoices.

You will then have all bookings invoiced. You will now need to re-attach each payment to the invoices – do this by clicking on the clients account, click on each payment individually and allocate it to the corresponding invoice in the dropdown box, and click save.

Publish an event on What's On page

Last Modified on 21/04/2021 1:37 pm BST

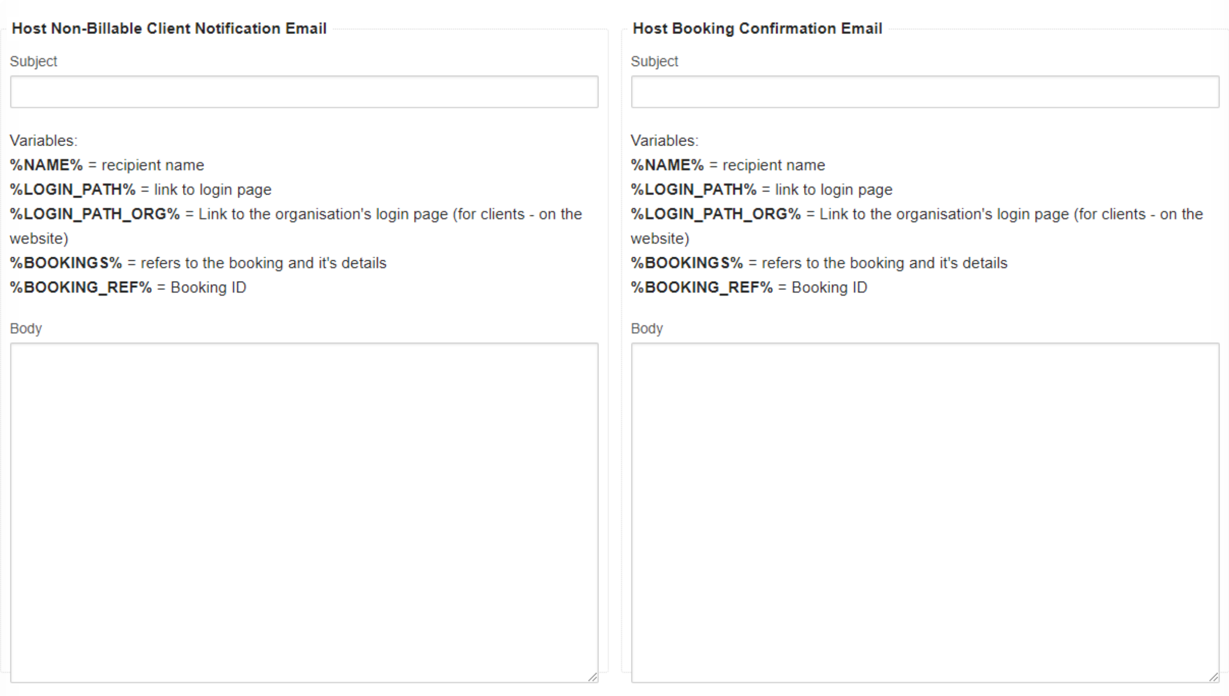
Adding Host Details to a booking

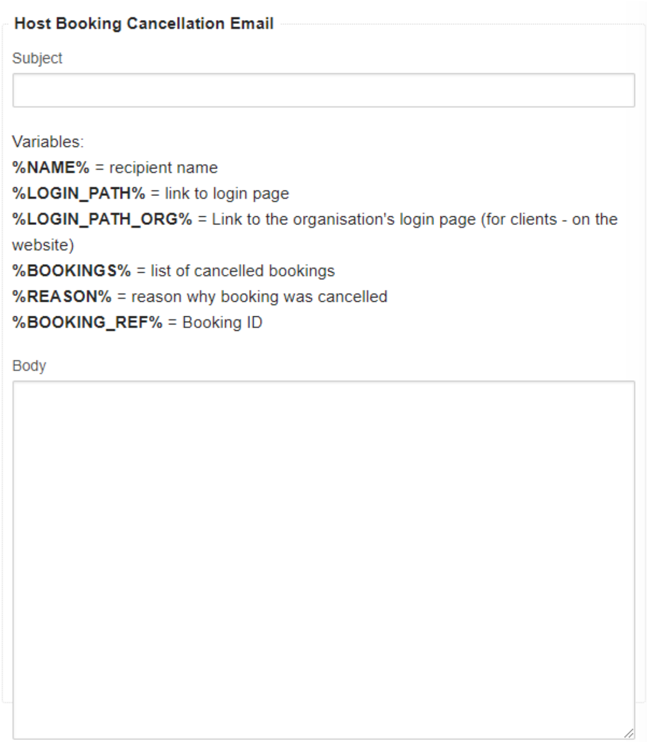
Last Modified on 06/11/2020 9:56 am GMT

We have now introduced the option of adding host details to a booking, so that it is easy to see what person (host) will actually be attending onsite on the day of the booking, and so that their contact details are accessible if needed. The host (as well as the users with the booking role) will also receive booking confirmation emails and cancellation emails. This means there is less risk of them not turning up or attending when the booking has been cancelled.

ACTION: Populate new email templates

To enable the host functionality to work, there are 3 new email templates, that need populating. These can be found and populated in the Manage area - Manage > Edit Venue > Emails.



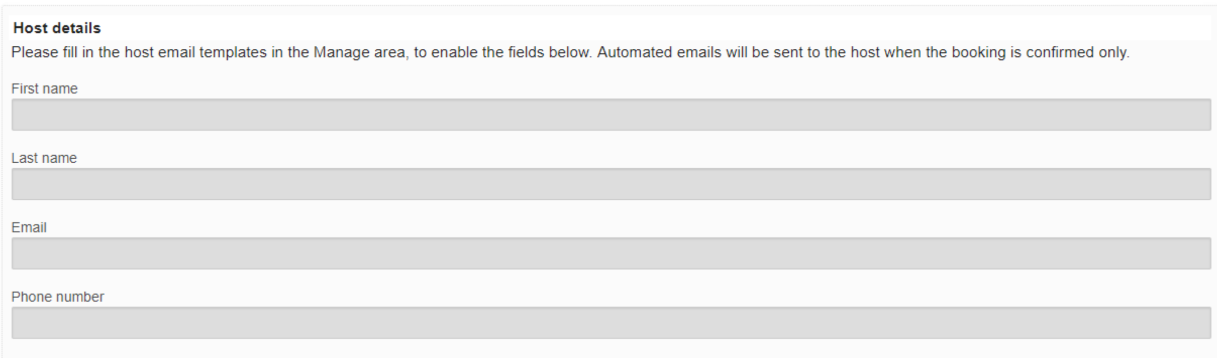

Host Booking Cancellation Email

Subject

Variables:
%NAME% = recipient name
%LOGIN_PATH% = link to login page
%LOGIN_PATH_ORG% = Link to the organisation's login page (for clients - on the website)
%BOOKINGS% = list of cancelled bookings
%REASON% = reason why booking was cancelled
%BOOKING_REF% = Booking ID

Body

Use of the host feature is optional and the feature will become accessible once the above email templates are populated. If you do not wish to use this feature then simply leave these templates blank! This will mean that when you create or edit a booking, the host information fields will be greyed out -


Host details

Please fill in the host email templates in the Manage area, to enable the fields below. Automated emails will be sent to the host when the booking is confirmed only.

First name

Last name

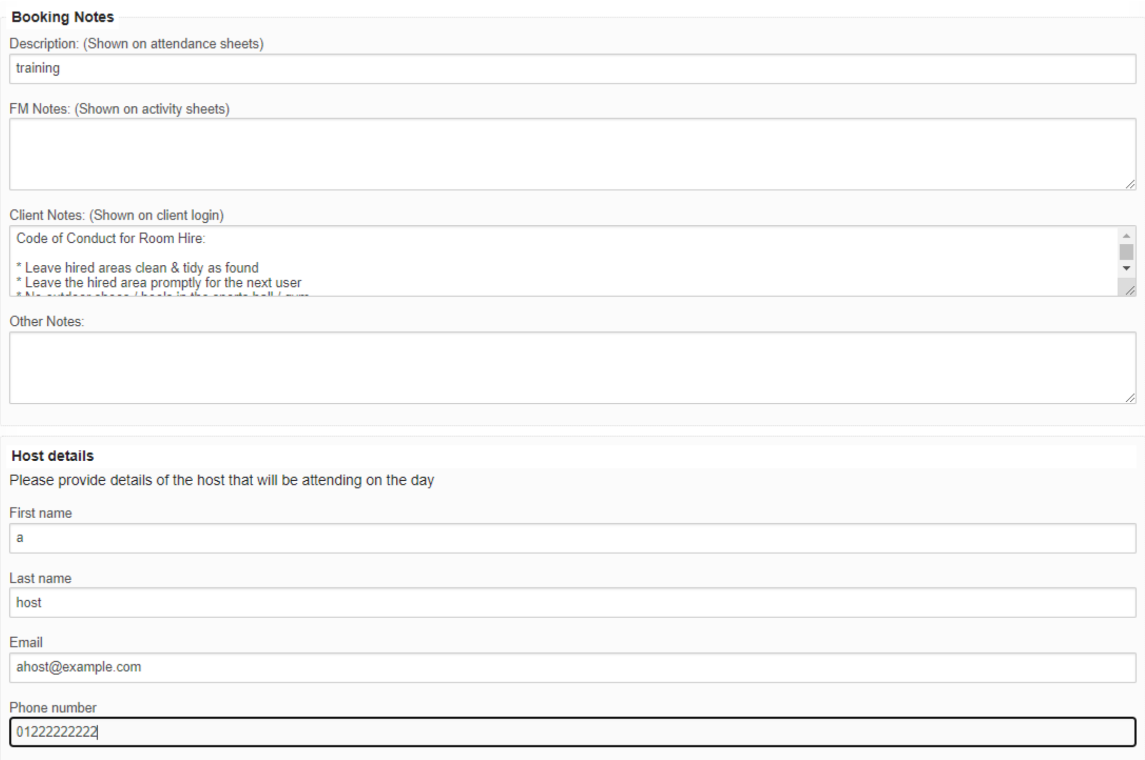
Email

Phone number

Once the above templates are populated you are then ready to start adding host details to your bookings!

Adding host details to bookings:

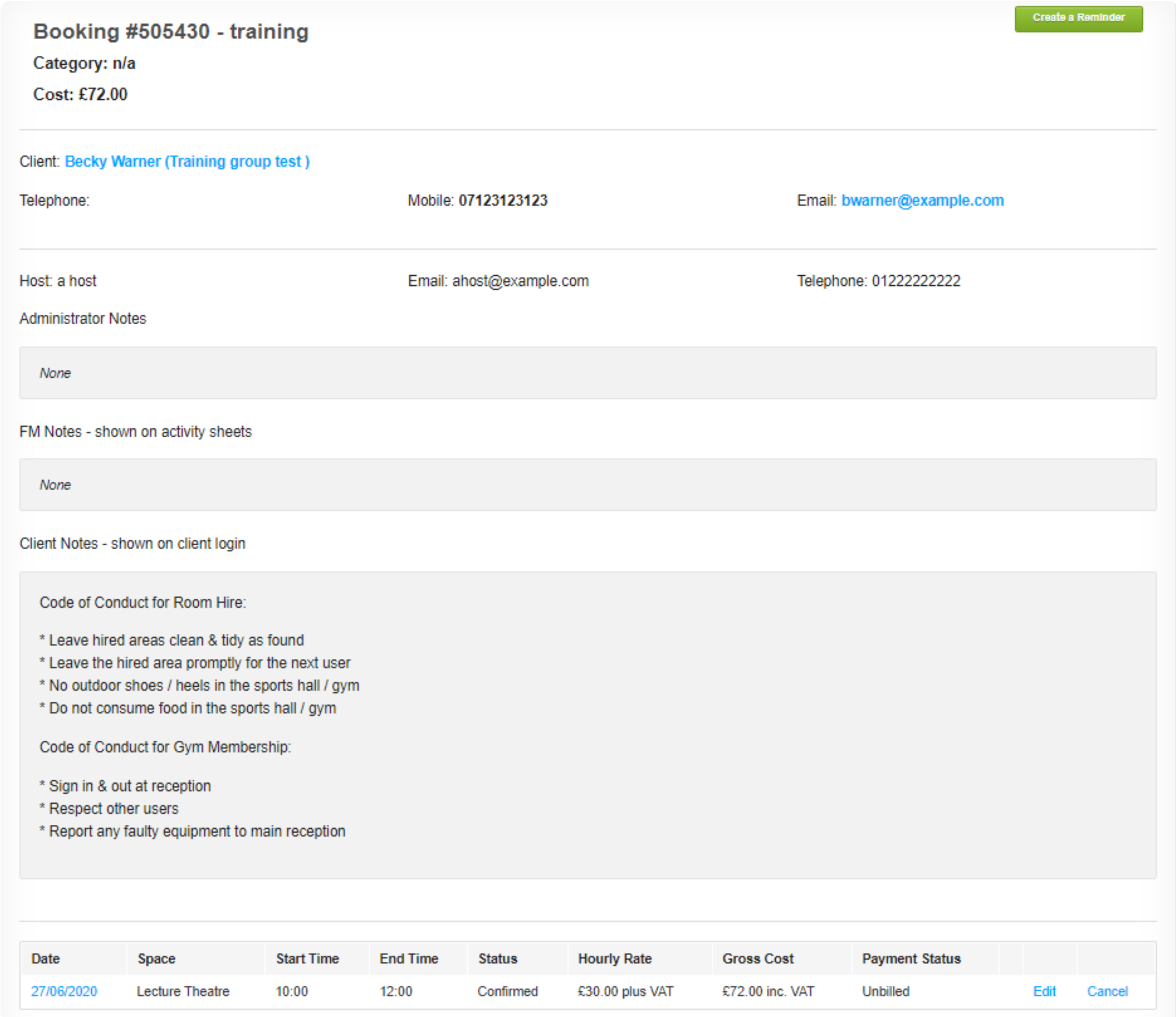
When creating or editing a booking the host details section at the bottom of the form can be populated as needed, you don't need to populate these for all bookings, just when relevant.



Booking Confirmation Emails:

When saving the booking, the provisional email will go out to the client users ticked for booking emails only. The host does not receive these. When the booking gets confirmed a copy of the host booking confirmation email will be sent out to the host to make them aware of this, as well as the normal booking confirmation emails that the client users on the account receive.

The host information is then visible when viewing the booking as both an administrator -



Create a Reminder

Booking #505430 - training

Category: n/a

Cost: £72.00

Client: Becky Warner (Training group test)

Telephone:

Mobile: **07123123123**

Email: bwarner@example.com

Host: a host

Email: ahost@example.com

Telephone: 01222222222

Administrator Notes

None

FM Notes - shown on activity sheets

None

Client Notes - shown on client login

Code of Conduct for Room Hire:

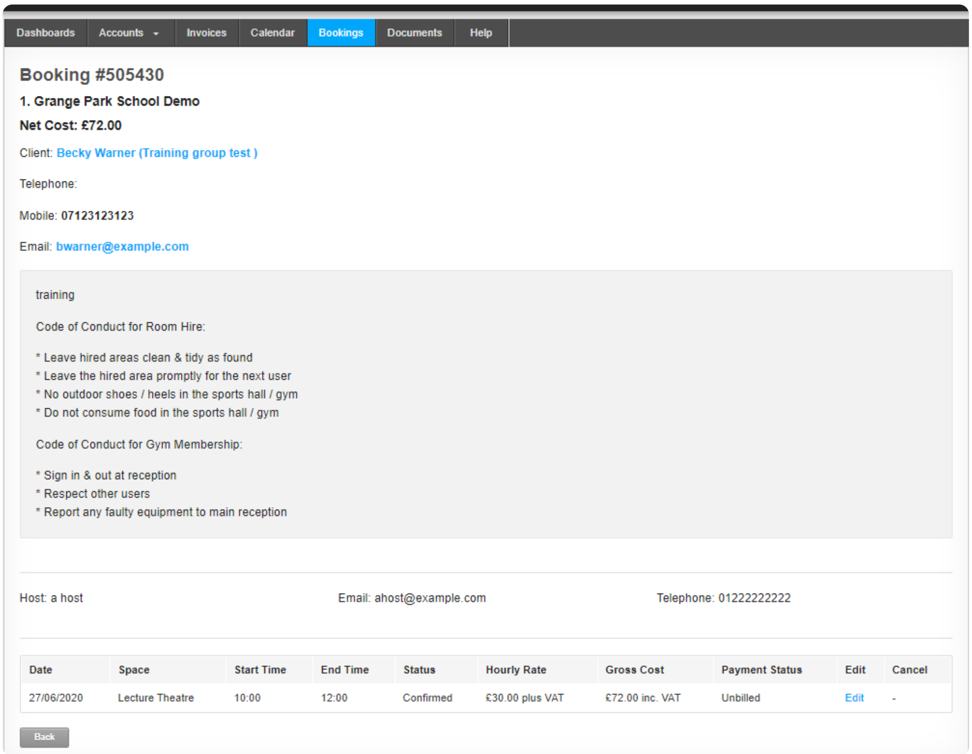
* Leave hired areas clean & tidy as found
* Leave the hired area promptly for the next user
* No outdoor shoes / heels in the sports hall / gym
* Do not consume food in the sports hall / gym

Code of Conduct for Gym Membership:

* Sign in & out at reception
* Respect other users
* Report any faulty equipment to main reception

Date	Space	Start Time	End Time	Status	Hourly Rate	Gross Cost	Payment Status		
27/06/2020	Lecture Theatre	10:00	12:00	Confirmed	£30.00 plus VAT	£72.00 inc. VAT	Unbilled	Edit	Cancel

and as a client -



Booking Cancellation Emails:

When a booking is cancelled, and you choose to notify via email, the host will also receive the cancellation email.

Updating VAT on a Booking

Last Modified on 03/02/2021 5:34 pm GMT

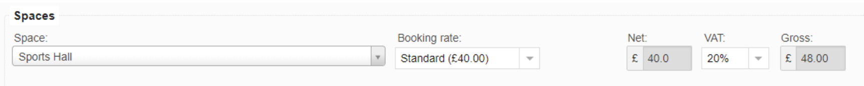
With the proposed changes to the UK's VAT rates, we have updated how you can set VAT at your venue, both on Client's accounts and for New and Existing Bookings.

Instead of the old text box, our new drop-down option allows you to quickly and easily adjust VAT rates for your clients bookings!

Adjusting VAT on a Booking

When creating a New Booking, there are a number of ways to adjust the VAT for your booking.

1) On the New Booking page, you can adjust the VAT for a selected space, using the drop-down menu;



2) You can also add VAT to a Sundry Item, and edit using the drop-down menu;

3) Individual occurrences can then be edited by selecting the  button; perfect for adjusting specific bookings within a weekly recurrence.

Editing a Booking from the Calendar

Unbilled bookings can have their pricing and VAT information edited from the calendar.

1) Select a booking on the calendar, and hit the 

button

2) Edit just "this occurrence"

3) You can now adjust the VAT using the drop-down menu displayed - hit save to keep your changes!

Editing a Booking from the Bookings Tab

As with the Calendar, unbilled bookings can be adjusted from the Bookings tab.

1) From the Bookings Tab, select the "Edit" button for the booking you wish to update

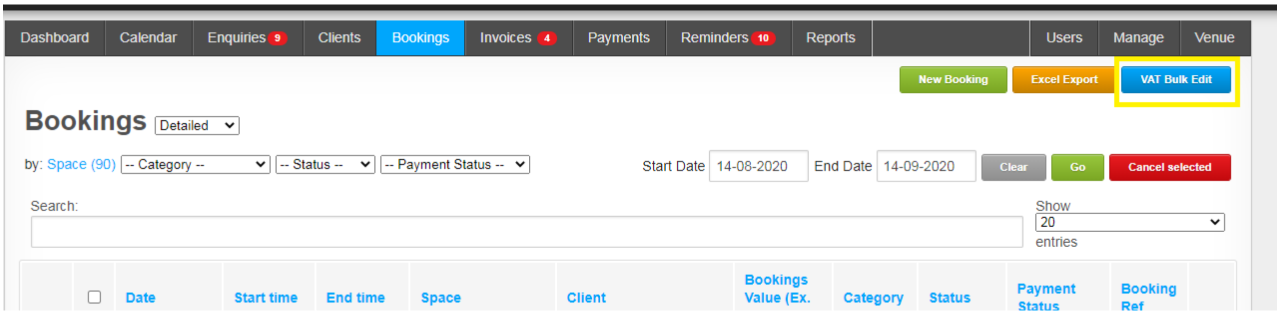
2) Select a new VAT rate from the drop-down menu

Bulk editing VAT rates for Bookings

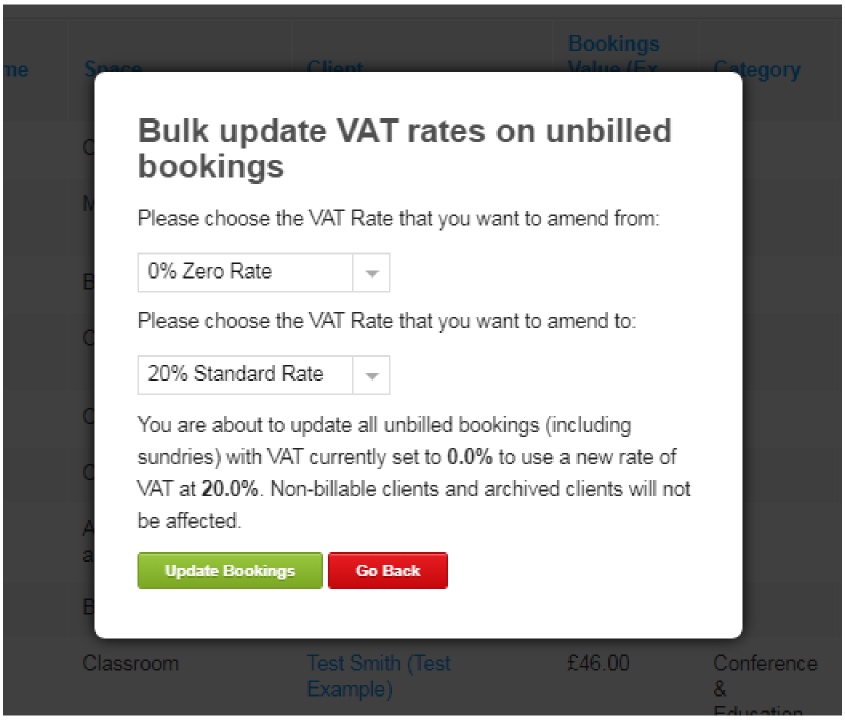
Last Modified on 18/02/2022 12:10 pm GMT

For Master Venue Admins, we have introduced new functionality to update multiple existing unbilled bookings from one VAT rate to another.

To do this, simply go to the Bookings tab, click the 'VAT Bulk Edit' button in the top right:

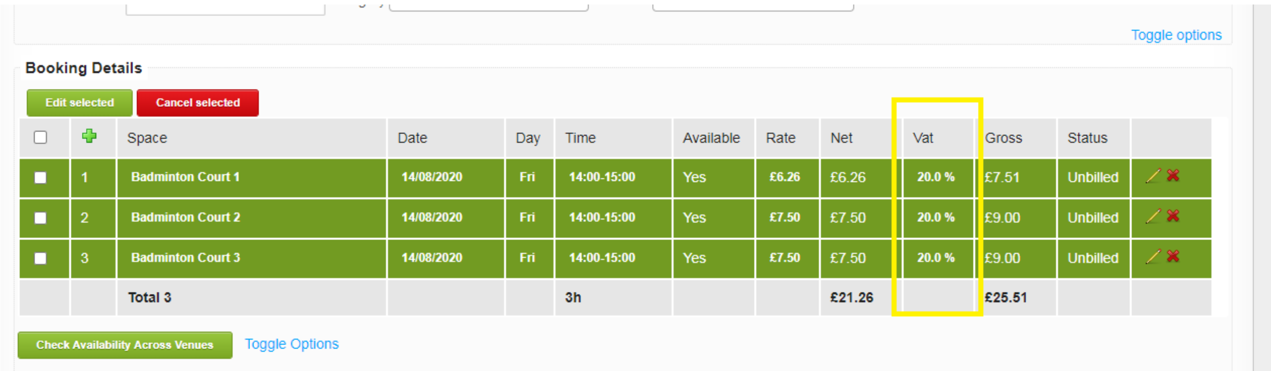


Then select the VAT rate of bookings you would like to change from, and the VAT rate you would like to change these bookings to:



Once you have selected to 'Update Bookings' please allow the system to complete the task before you click off the pop-up or run a new bulk edit.

Once completed, you can check that your bookings that previously had the 'From' VAT rate have updated. From the bookings tab, click on the Booking Ref, and click on the Blue Edit button at the bottom of the page:



Toggle options

Booking Details

Edit selected | Cancel selected

		Space	Date	Day	Time	Available	Rate	Net	Vat	Gross	Status	
	1	Badminton Court 1	14/08/2020	Fri	14:00-15:00	Yes	£6.26	£6.26	20.0 %	£7.51	Unbilled	
	2	Badminton Court 2	14/08/2020	Fri	14:00-15:00	Yes	£7.50	£7.50	20.0 %	£9.00	Unbilled	
	3	Badminton Court 3	14/08/2020	Fri	14:00-15:00	Yes	£7.50	£7.50	20.0 %	£9.00	Unbilled	
		Total 3			3h			£21.26		£25.51		

Check Availability Across Venues | Toggle Options

Please note: this will not update any bookings for archived clients or non-billable clients, or any bookings that have already been Invoiced.

Client invoicing

Last Modified on 06/11/2020 10:01 am GMT

Once your client has confirmed the booking, it's time to move onto invoicing:

To invoice at client level:

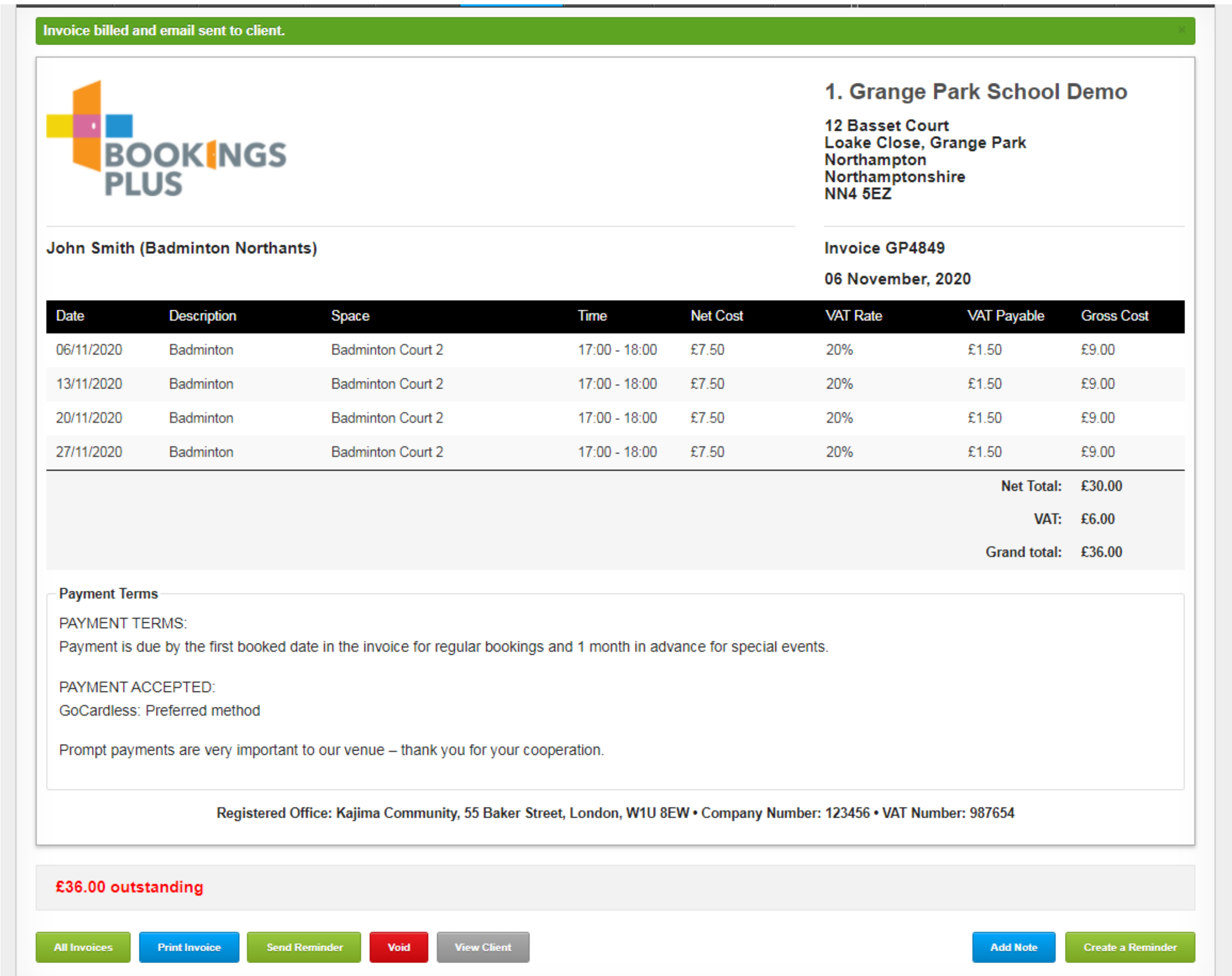
- Use the **Client** tab to select the client you wish to invoice and click View

- Scroll to the bottom of the client page

- Click on the **Generate Invoice** option

- Enter the dates for the invoice period, select **Generate**

- View the draft invoice & click to **Send by Email** if you are happy with the results. If there are amendments needed at this stage, simply click **Delete** . You will then be able to amend the booking & re-invoice as required.


Invoice billed and email sent to client.

BOOKINGS PLUS

1. Grange Park School Demo

12 Basset Court
Loake Close, Grange Park
Northampton
Northamptonshire
NN4 5EZ

John Smith (Badminton Northants)

Invoice GP4849

06 November, 2020

Date	Description	Space	Time	Net Cost	VAT Rate	VAT Payable	Gross Cost
06/11/2020	Badminton	Badminton Court 2	17:00 - 18:00	£7.50	20%	£1.50	£9.00
13/11/2020	Badminton	Badminton Court 2	17:00 - 18:00	£7.50	20%	£1.50	£9.00
20/11/2020	Badminton	Badminton Court 2	17:00 - 18:00	£7.50	20%	£1.50	£9.00
27/11/2020	Badminton	Badminton Court 2	17:00 - 18:00	£7.50	20%	£1.50	£9.00
						Net Total:	£30.00
						VAT:	£6.00
						Grand total:	£36.00

Payment Terms

PAYMENT TERMS:
Payment is due by the first booked date in the invoice for regular bookings and 1 month in advance for special events.

PAYMENT ACCEPTED:
GoCardless: Preferred method

Prompt payments are very important to our venue – thank you for your cooperation.

Registered Office: Kajima Community, 55 Baker Street, London, W1U 8EW • Company Number: 123456 • VAT Number: 987654

£36.00 outstanding

Note - while invoice is at draft stage, it is not visible to the client.

Bulk invoicing

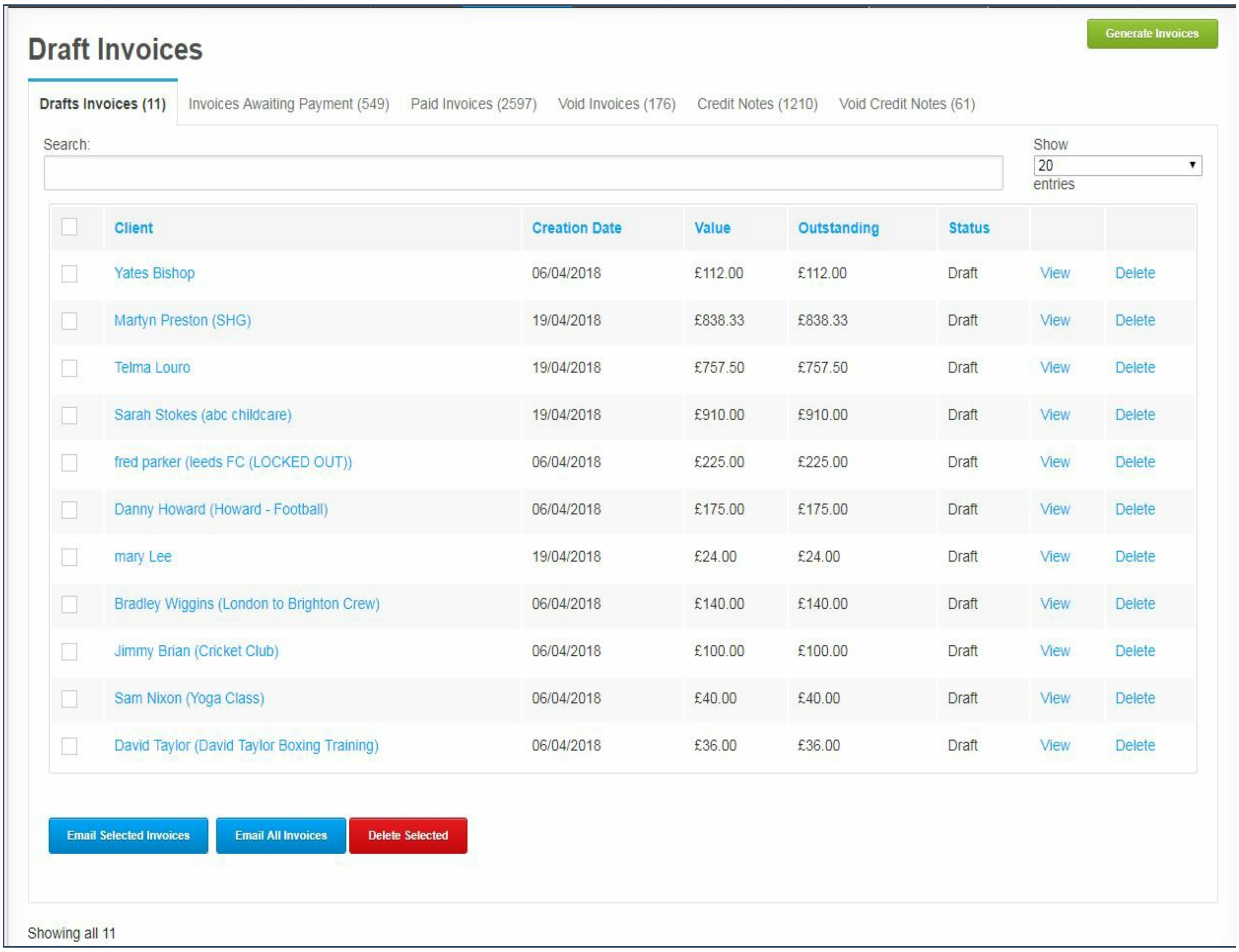
Last Modified on 06/11/2020 10:04 am GMT

Here's the steps to follow when it's time to do your monthly invoice run:

- Select the **Invoices** tab
- Click on the Generate Invoices button in the top right corner
- Choose the dates you wish to invoice for and click Generate . A draft invoice will be raised for each client for all the confirmed bookings in that period that haven't yet been invoiced.
- You will then be taken to the **Draft Invoices** sub-tab and be able to view the invoices created.

TIP *Invoices will continue to load until the loading symbol next to the Generate Invoices button disappears. All should be generated within a few seconds but it will depend on how many you have!*

- From here, you are able to view individual invoices if required prior to sending.
- Invoices can be sent on an individual basis by selecting the required invoices and clicking Email Selected Invoices
- Alternatively, click on Email All Invoices to send all invoices.



TIP *to ensure that your client accounts are up to date, complete the following steps once you've invoiced:*

- From the **Credit Notes** tab, allocate any unallocated credit notes
- From the **Payments** tab, filter the page by 'Unallocated' and ensure that any unallocated payment are applied to the recent invoice

Weekly invoicing

Last Modified on 06/11/2020 1:05 pm GMT

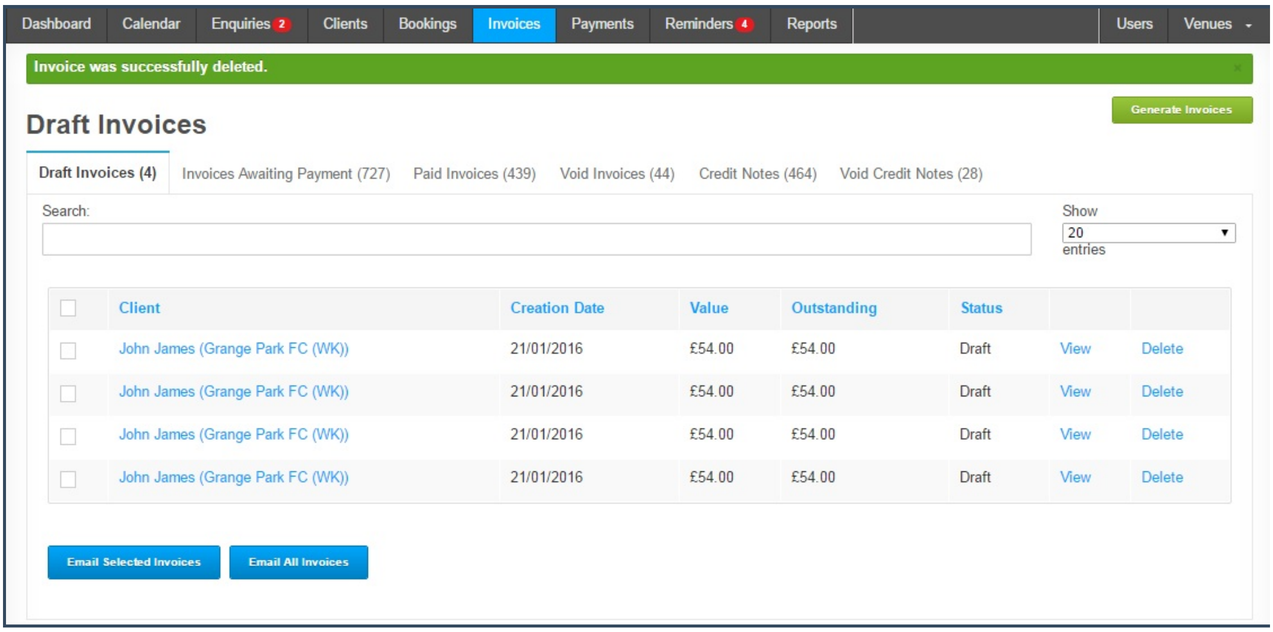
Weekly invoicing can be a common request, particularly for football groups. By raising them weekly, this allows the client to pay the invoice via GoCardless, reducing the need for you to collect their cash on a weekly basis.

We'd recommend that these invoices are done first, before you do the bulk invoice run for your school. To identify these clients, why not put a flag against their client account. See our article on how to set this up here.

If rather than manually bulk invoicing your clients you have automated invoicing setup, you tick exclude certain clients from being picked up in the run. See our Automated invoicing article on how to set this up here.

Follow these invoicing instructions for weekly invoices:

- Use the **Clients** tab to select the client you wish to invoice
- Scroll to the bottom of the client page
- Click on the Generate Invoice option
- Enter the dates for the first week of the month, select Generate
- Use back button on browser & repeat date process until you've completed each week.
- Now the invoices are available to view either on the client account or on the **Invoices** tab. Simply click to send them now, or as part of your bulk invoice run.

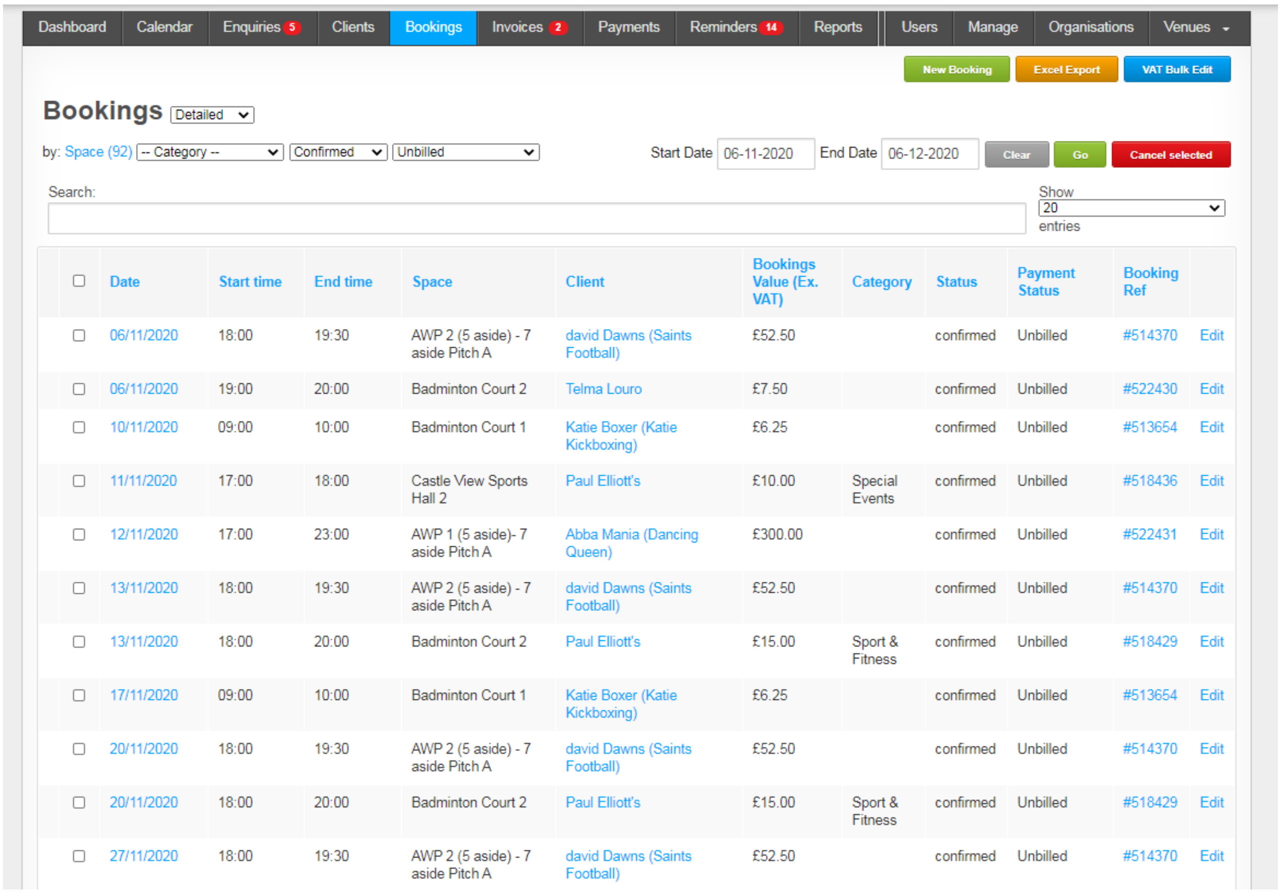


Invoicing tips

Last Modified on 03/02/2021 6:47 pm GMT

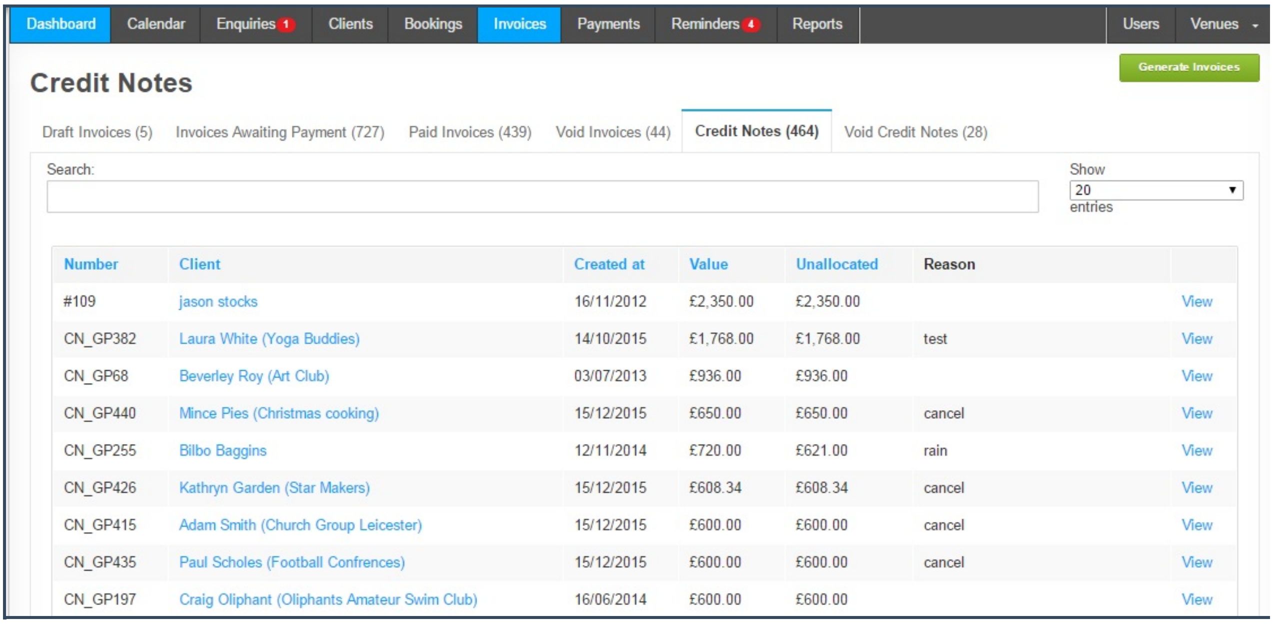
We recommend the following to make sure your invoicing is as accurate as possible:

- Raise your invoices at the same time each month. This will benefit your customers, as they will know when to expect the invoices & also help with your administration.
- Before you generate your invoices for the month, check the**Bookings** tab to see if any bookings from the previous month are unbilled. Use the filters to select 'Confirmed' & 'Unbilled' and amend the date range as required. These bookings can then be billed by client if needed, or amend the date range on your bulk invoice run.

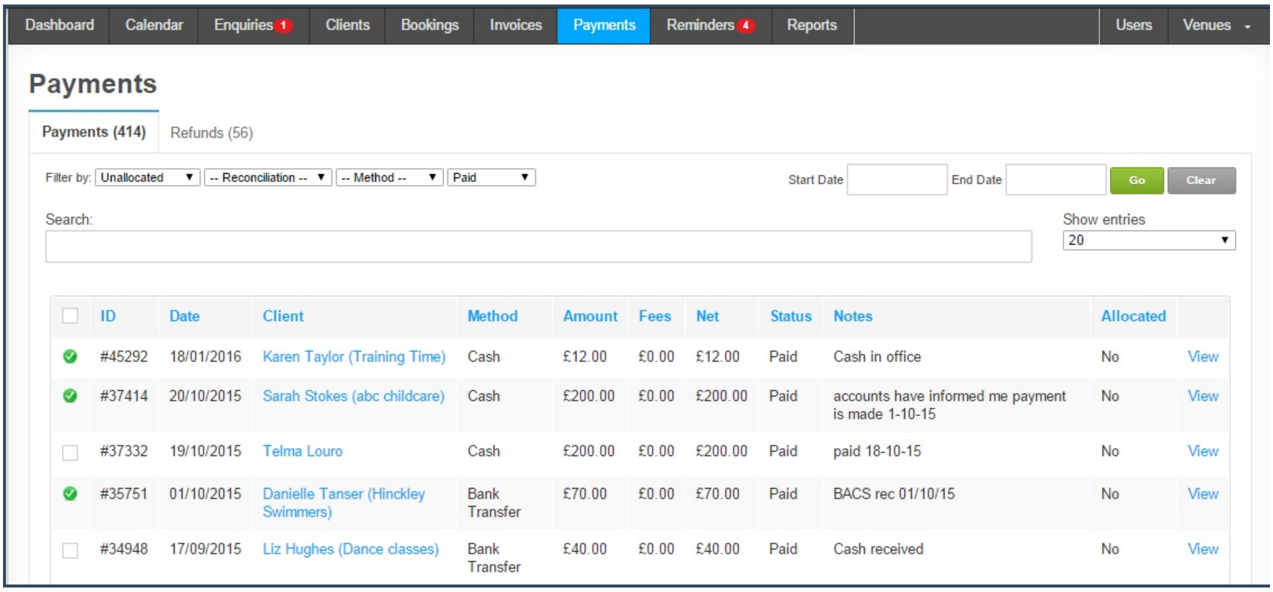


	Date	Start time	End time	Space	Client	Bookings Value (Ex. VAT)	Category	Status	Payment Status	Booking Ref	
☐	06/11/2020	18:00	19:30	AWP 2 (5 aside) - 7 aside Pitch A	david Dawns (Saints Football)	£52.50		confirmed	Unbilled	#514370	Edit
☐	06/11/2020	19:00	20:00	Badminton Court 2	Telma Louro	£7.50		confirmed	Unbilled	#522430	Edit
☐	10/11/2020	09:00	10:00	Badminton Court 1	Katie Boxer (Katie Kickboxing)	£6.25		confirmed	Unbilled	#513654	Edit
☐	11/11/2020	17:00	18:00	Castle View Sports Hall 2	Paul Elliott's	£10.00	Special Events	confirmed	Unbilled	#518436	Edit
☐	12/11/2020	17:00	23:00	AWP 1 (5 aside)- 7 aside Pitch A	Abba Mania (Dancing Queen)	£300.00		confirmed	Unbilled	#522431	Edit
☐	13/11/2020	18:00	19:30	AWP 2 (5 aside) - 7 aside Pitch A	david Dawns (Saints Football)	£52.50		confirmed	Unbilled	#514370	Edit
☐	13/11/2020	18:00	20:00	Badminton Court 2	Paul Elliott's	£15.00	Sport & Fitness	confirmed	Unbilled	#518429	Edit
☐	17/11/2020	09:00	10:00	Badminton Court 1	Katie Boxer (Katie Kickboxing)	£6.25		confirmed	Unbilled	#513654	Edit
☐	20/11/2020	18:00	19:30	AWP 2 (5 aside) - 7 aside Pitch A	david Dawns (Saints Football)	£52.50		confirmed	Unbilled	#514370	Edit
☐	20/11/2020	18:00	20:00	Badminton Court 2	Paul Elliott's	£15.00	Sport & Fitness	confirmed	Unbilled	#518429	Edit
☐	27/11/2020	18:00	19:30	AWP 2 (5 aside) - 7 aside Pitch A	david Dawns (Saints Football)	£52.50		confirmed	Unbilled	#514370	Edit

- Once you've raised the invoices, check to ensure there are no unallocated credit notes. Do this on**Invoices** tab, selecting **Credit Notes** sub-tab. Click on the 'Unallocated' column header to sort by value. To action these, click on View. This will bring up the credit note, with a drop down menu at the bottom to allocate to an invoice.



- The final step is to make sure that there are no unallocated payments. Do this on the **Payments** tab & use the filters shown below to identify these. To action these, click on View



Tip - It's essential to ensure that you've done the steps above to allocate any credit balances, as customers are only able to pay the invoice amount via GoCardless.

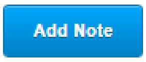
Invoice Notes

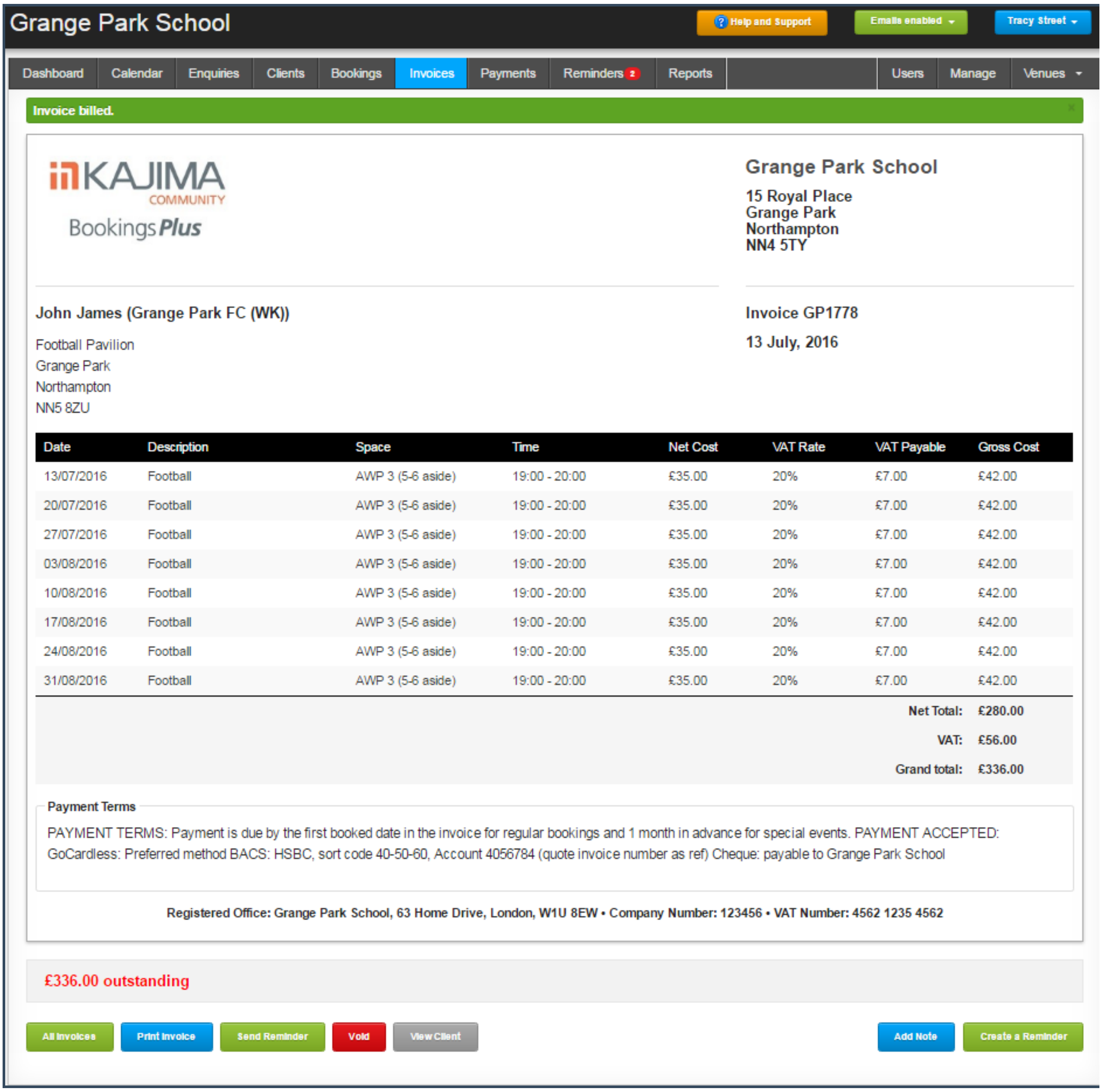
Last Modified on 06/11/2020 4:29 pm GMT

We know that sometimes it can be hard work to keep on top of debtors! So we have a great feature on BookingsPlus to help with this.

On each invoice, there is now an option to add notes as well as a reminder. The notes section can be used to track all your interaction with the client regarding the invoice, ensuring that your debtor chasing is efficient & documented.

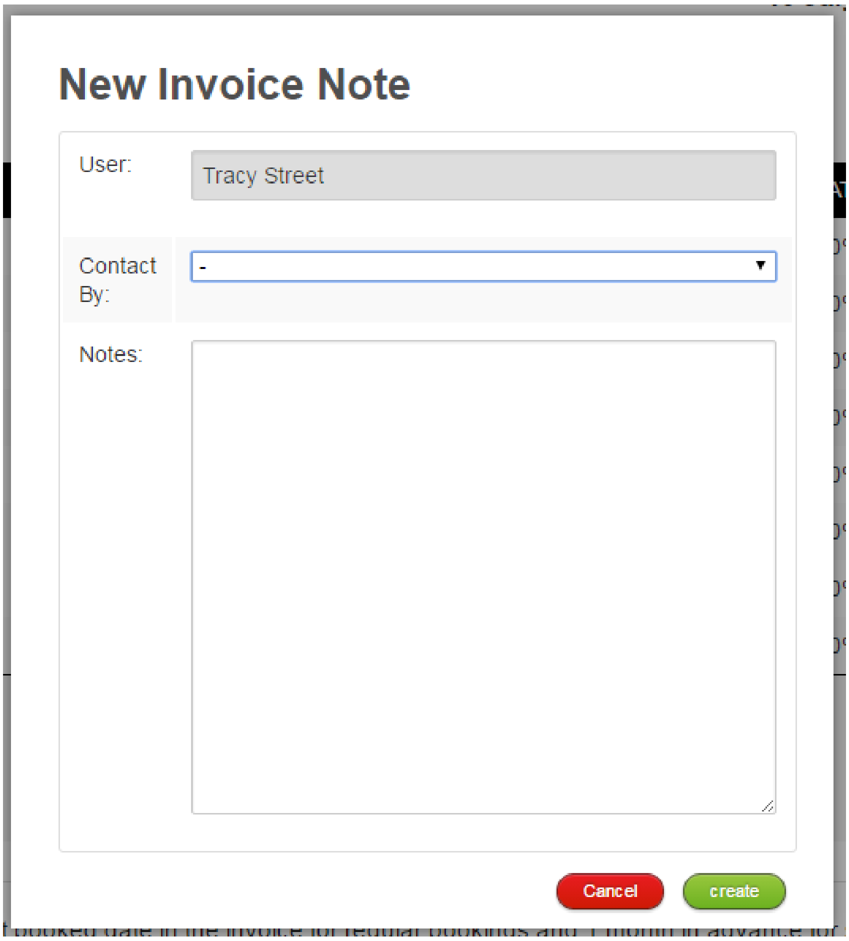
These invoice notes do not appear on any printed copies of invoices & are not visible to your hirers.

To add a note to the invoice simply click on the invoice (from either the client account or invoices tab). Scroll down to the bottom of the invoice and click 

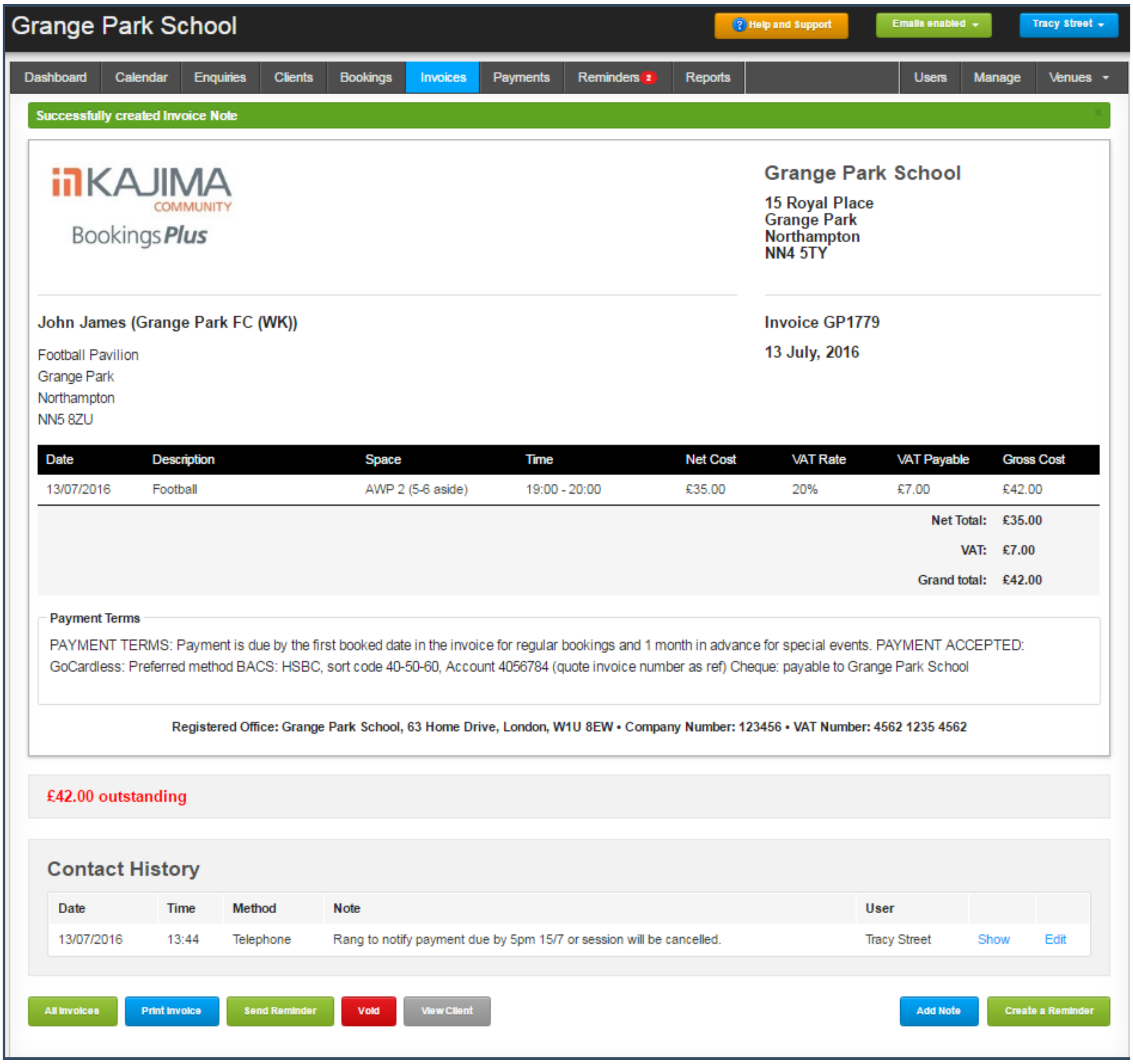


Date	Description	Space	Time	Net Cost	VAT Rate	VAT Payable	Gross Cost
13/07/2016	Football	AWP 3 (5-6 aside)	19:00 - 20:00	£35.00	20%	£7.00	£42.00
20/07/2016	Football	AWP 3 (5-6 aside)	19:00 - 20:00	£35.00	20%	£7.00	£42.00
27/07/2016	Football	AWP 3 (5-6 aside)	19:00 - 20:00	£35.00	20%	£7.00	£42.00
03/08/2016	Football	AWP 3 (5-6 aside)	19:00 - 20:00	£35.00	20%	£7.00	£42.00
10/08/2016	Football	AWP 3 (5-6 aside)	19:00 - 20:00	£35.00	20%	£7.00	£42.00
17/08/2016	Football	AWP 3 (5-6 aside)	19:00 - 20:00	£35.00	20%	£7.00	£42.00
24/08/2016	Football	AWP 3 (5-6 aside)	19:00 - 20:00	£35.00	20%	£7.00	£42.00
31/08/2016	Football	AWP 3 (5-6 aside)	19:00 - 20:00	£35.00	20%	£7.00	£42.00
						Net Total:	£280.00
						VAT:	£56.00
						Grand total:	£336.00

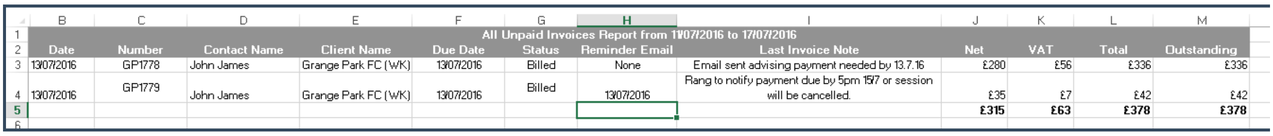
A pop-up box will appear, click on the 'contact by' drop down box to choose your contact method, then add your note in the field below. Once done, click 'create'.



Once saved, your note will appear at the bottom of the invoice, along with your name/date & time for audit purposes.



If you have added notes to an invoice, then the most recent note will appear on your Unpaid Invoices report.



All Unpaid Invoices Report from 11/07/2016 to 17/07/2016

Date	Number	Contact Name	Client Name	Due Date	Status	Reminder Email	Last Invoice Note	Net	VAT	Total	Outstanding
13/07/2016	GP1778	John James	Grange Park FC (WK)	13/07/2016	Billed	None	Email sent advising payment needed by 13.7.16	£280	£56	£336	£336
13/07/2016	GP1779	John James	Grange Park FC (WK)	13/07/2016	Billed	13/07/2016	Rang to notify payment due by 5pm 15/7 or session will be cancelled.	£35	£7	£42	£42
								£315	**£63**	**£378**	**£378**

Reminders can also be added by clicking Create a Reminder . There will be a banner at the top of the invoice to indicate a reminder has been set & the reminder can also be viewed/action from the **Reminders** tab.

Adding a Purchase Order

Last Modified on 06/11/2020 4:39 pm GMT

To add a Purchase Order to a booking:

To do this go to the **Clients** tab – locate your client & click View – Click on the relevant booking –

Click  at the bottom of the page.

At the top of the Bookings form you will see the following:

From here you can enter the Purchase order number – this will appear on the invoice.

Any bookings that have a purchase order against them will appear on a separate invoice to different Purchase Orders or bookings without a Purchase Order.

If a booking has already been invoiced, the above steps can still be done and the PO number will be immediately visible on the invoice which was previously created.

Credit notes

Last Modified on 03/02/2021 5:35 pm GMT

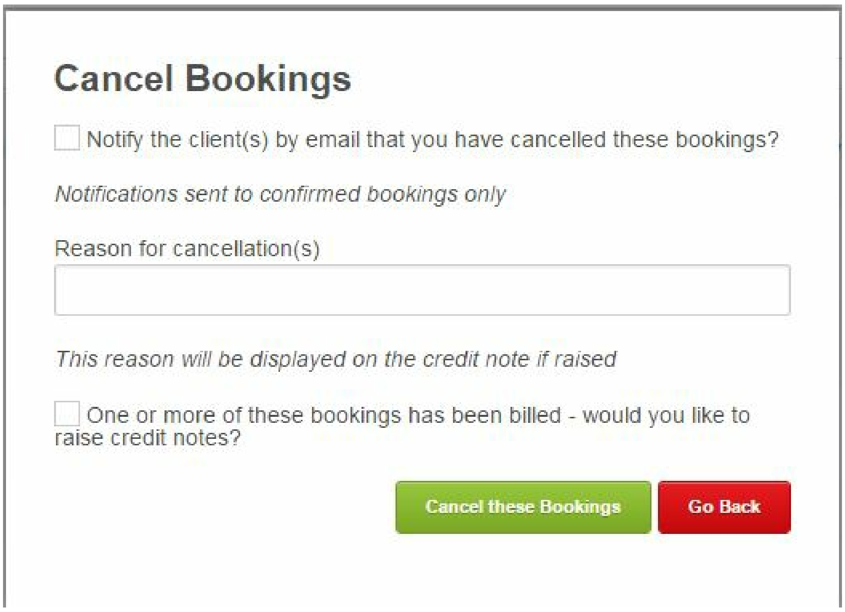
When cancelling a booking that has been invoiced you will want to raise a credit note.

This can be done before or after payments have been made but require a slightly different process.

Credit notes can either be viewed on the clients account page or in the Credit notes sub-tab within the Invoices tab.

Before a payment has been made :

When cancelling an invoiced booking you will receive the following pop up, fill in the details and select the tick box asking if you would like to raise a credit note.



Once you have done this another tick box will appear asking if you want to notify the client by email that you have raised a credit note.

Then click Cancel these Bookings, this will then take you to the credit note.

On the credit note you will see full details of the booking, and which invoice it was raised on.

John James (Grange Park FC (WK))

Football Pavilion
Grange Park
Northampton
NN5 8ZU

Credit Note CN_GP830

05 October, 2016

Description	Net Value	VAT Rate	VAT Amount	Gross Value
Credit for cancelled booking: Badminton Court 1 on 24/10/2016 at 21:00. Billed on invoice GP1895	£10.00	20.0%	£2.00	£12.00
Credit for sundry: Caretaker	£10.00	0.0%	£0.00	£10.00
			Net Total:	**£20.00**
			VAT:	**£2.00**
			Grand total:	**£22.00**

Registered Office: Kajima Community, 55 Baker Street, London, W1U 8EW • Company Number: 123456 • VAT Number: 987654

Applied to 1 invoice:

- £22.00 applied to Invoice GP1895 on 14/01/2021 (Remove)

Scroll down to the bottom of the credit note and you will see it has automatically been 'applied to invoice xxxxxxx'

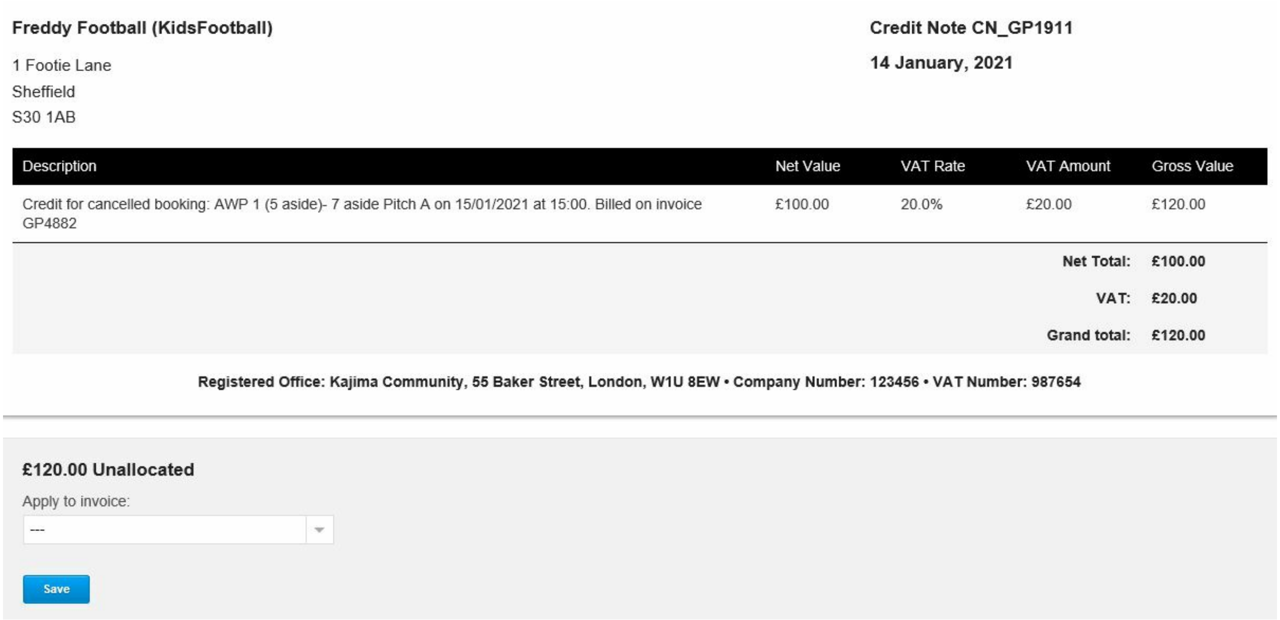
The booking will still appear on the invoice but the client will be able to see that a credit note has been allocated and only able to pay the outstanding amount less the value of the credit note.

After a payment has been made:

If a payment has been made the cancellation process is the same, however the account will show as in credit by the bookings value amount if there are no outstanding invoices for payment.

The credit note should be allocated to the relevant invoice number (this is listed under Description on the credit note). To do this you will need to click on the grey View Client button then click on the required invoice number (in blue).

Now unallocate the payment listed at the bottom by clicking on Remove (in blue) this will free up the invoice. Click back on View Client and scroll to the credit note you have just created and click on it (in blue).



Freddy Football (KidsFootball)

1 Footie Lane
Sheffield
S30 1AB

Credit Note CN_GP1911

14 January, 2021

Description	Net Value	VAT Rate	VAT Amount	Gross Value
Credit for cancelled booking: AWP 1 (5 aside)- 7 aside Pitch A on 15/01/2021 at 15:00. Billed on invoice GP4882	£100.00	20.0%	£20.00	£120.00
			Net Total:	**£100.00**
			VAT:	**£20.00**
			Grand total:	**£120.00**

Registered Office: Kajima Community, 55 Baker Street, London, W1U 8EW • Company Number: 123456 • VAT Number: 987654

£120.00 Unallocated

Apply to invoice:

Save

Click on the drop down by Apply to invoice and select the invoice number listed under the Description on your credit note, click Save.

It would be at this point you would need to ask the client if they would like the credit to be allocated to a future invoice (such as if they are a weekly hirer) or if they would like the money refunded to them.

TIP – We would always advise that after doing an invoice run check credit notes sub-tab to see if any credits can now be allocated.

Voiding a credit note:

To void a credit note you will first want to ensure it is not allocated to an invoice. You can do this by clicking on the Credit note and at the bottom of the Credit note all of the invoices will be listed. To unallocate them simply click (Remove).

The next step is to click back onto the credit note, and click Void at the bottom of the screen.

A pop up will then appear asking for a Reason for voiding and Would you like to inform the customer via email? Then click Save.

If you would like to see further details on cancelling a booking please go to (cancelling a booking) article.

Invoice not generating

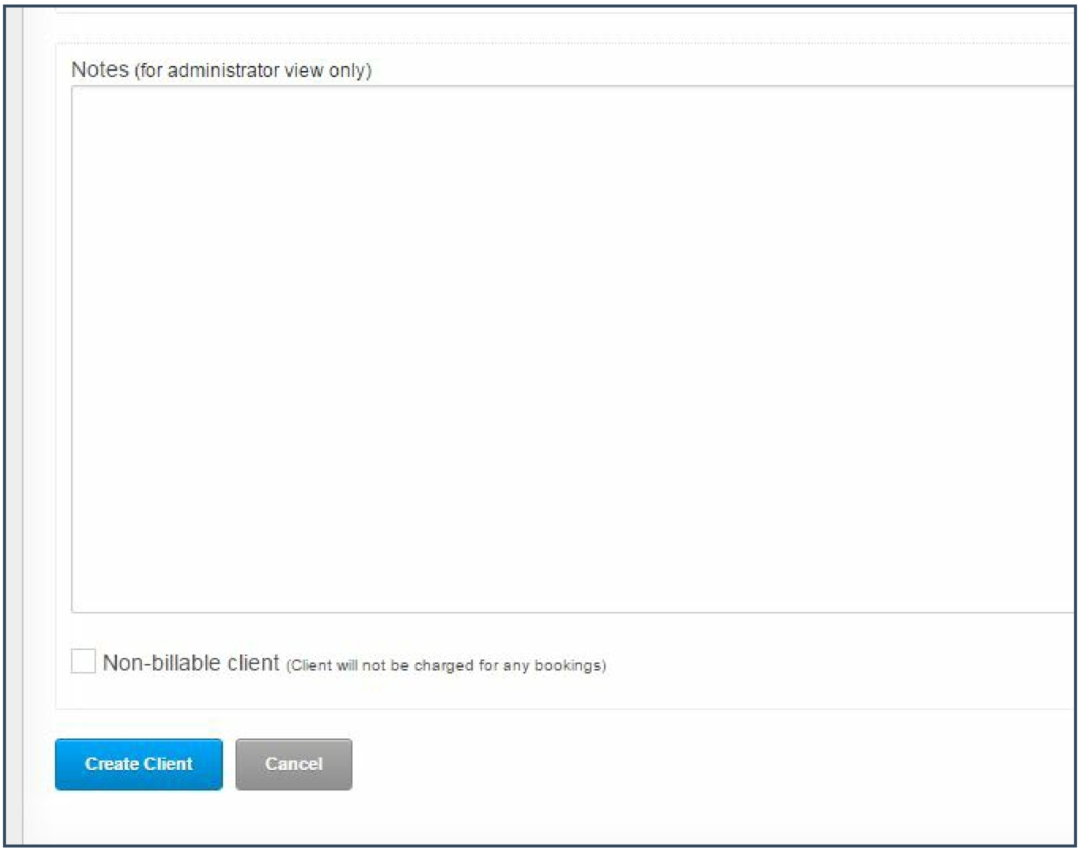
Last Modified on 03/02/2021 6:27 pm GMT

If you are trying to generate an invoice but it isn't appearing, here's a few steps you can take to identify why.

Firstly, ensure the booking is not still provisional as only a confirmed booking can be invoiced. This can be checked by going to the bookings tab, locating the booking and looking at the status column.

Next, ensure the booking has a value against it. A free or zero value booking won't pull through onto an invoice (unless there are other billable bookings within the selected period).

Is your client set up as a non-billable client (see below)? If so, no invoices will be generated.



Has a draft invoice already been created against the booking? To check this, either go to the **Invoices** tab and click on the Draft tab, or check the Client Account for draft invoices. If this is the case, review the invoice to check it is still correct and issue as normal.

If none of these are applicable, then please do give us a call at helpdesk on 01604 677764.

Automated invoicing

Last Modified on 03/02/2021 2:44 pm GMT

Automated Invoicing

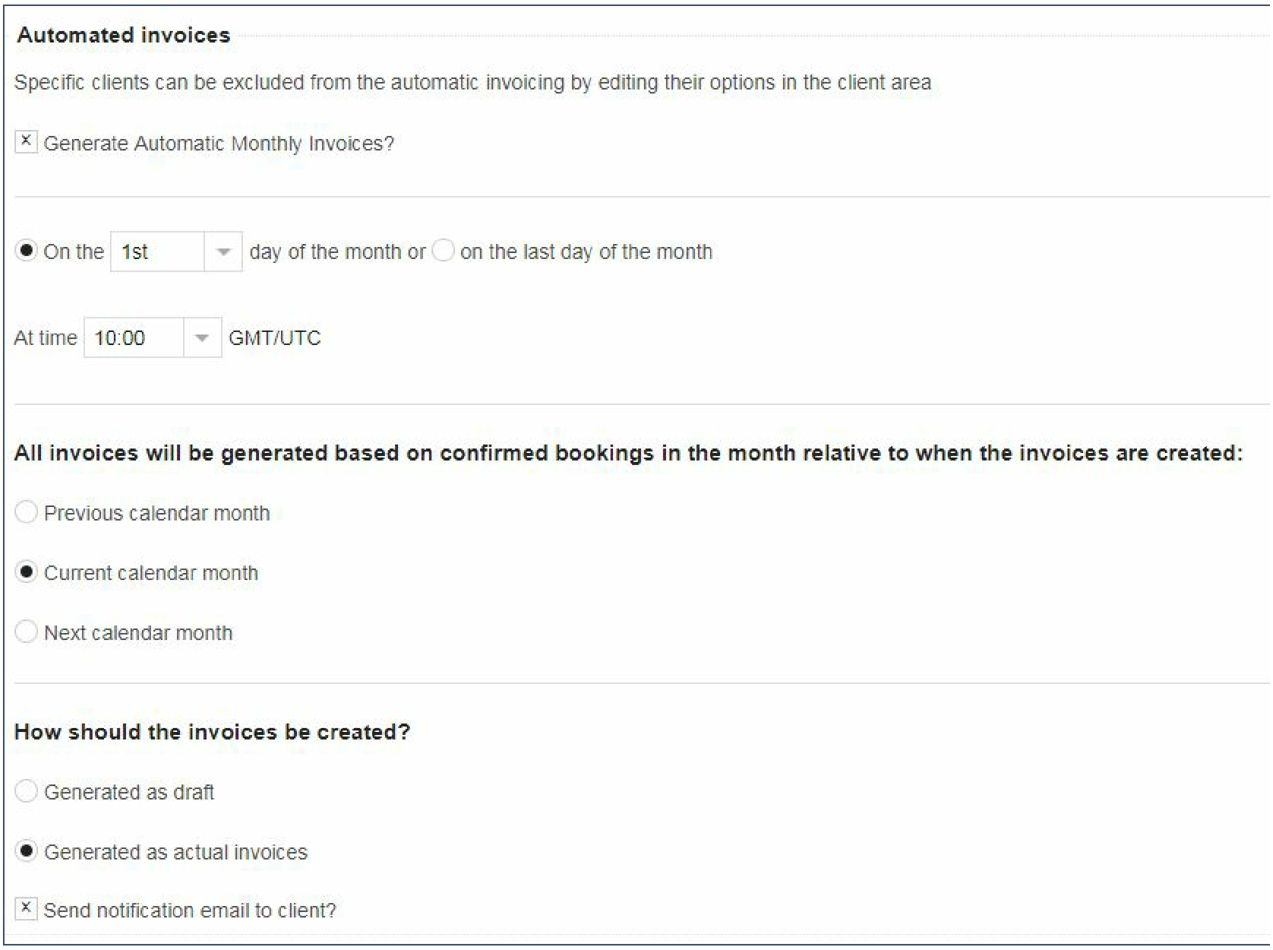
You can now do your invoicing, even when you are not sat at your desk!

Automated invoicing gives you the tools to generate your invoices at a set time, on a set day, for Previous, Current or Next calendar months. You then can decide if you would like these to be generated as a draft invoice, giving you the chance to review them before they are sent out to the client, or, you can have them generated as an actual invoice, with the option to send the client an email notification.

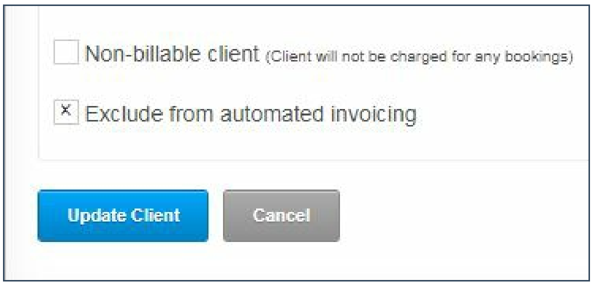
To use this feature, go to the **Manage** tab - 

 - **Billing**, fill out the below settings and click 

 .



Once this is set up, the option will appear to exclude certain clients from the monthly automated invoicing. You can do this from the **Clients** Tab - Edit Client link- and scroll to the very bottom of the page. You will then find the below option; tick to 'Exclude from automated invoicing' and click .



Once the invoices are run, if you have selected to have these sent out as actual (published) invoices these will now appear in the clients accounts, and they may also have an email to notify them if you have ticked this option.

If you have requested that these be generated as a draft, the Invoices tab will now have a red indicator showing the number of **DRAFT** invoices requiring action. 

These will need to be emailed out or to click 

if the client does not want an email notification, as before.

Going forward, automated invoicing will be developed further to give you the option of generating an invoice automatically for late bookings (those booked in after the scheduled invoicing).

Watch our video tutorial:

Add a manual payment

Last Modified on 06/11/2020 5:15 pm GMT

Manual payments (any method of payment other than GoCardless or Stripe) can easily be added to BookingsPlus.

This means you can still accept BACS, cheques and cash from your hirers if you choose.

To add a manual payment, follow these steps:

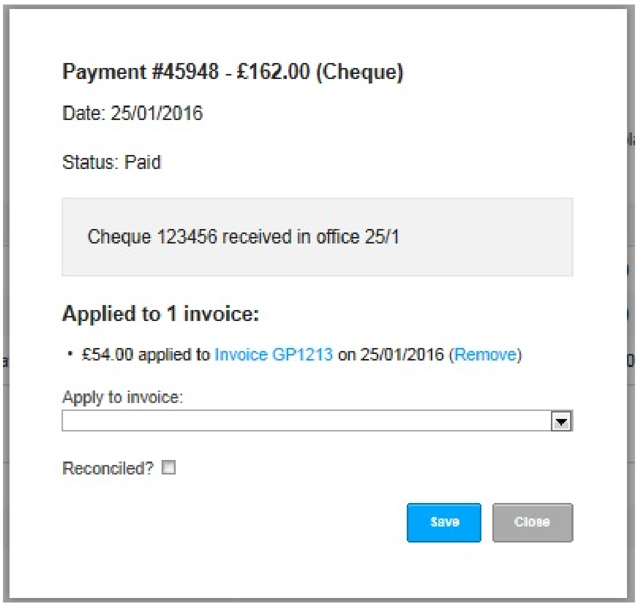
- Identify which client has made the payment & access their client account

- Scroll to the bottom of their client page & click 

- Complete screen below with full details. Click on 'Apply to Invoice' and a drop down list of all unpaid invoices will be shown.

You can only allocate to one invoice at a time. If you need to allocate to more than one invoice, then select the payment once it appears on the client account.

The pop-up box below will appear showing the payment & invoices it has already been allocated to, you will then be able to allocate the remainder of the payment.



Watch our video tutorial:

What is GoCardless?

Last Modified on 22/03/2022 1:45 pm GMT

GoCardless is our fully integrated online payment solution. Offering this payment method to your hirers ensures that there is no manual intervention required from yourselves from the point you raise the invoice, until you receive the money in your bank account!

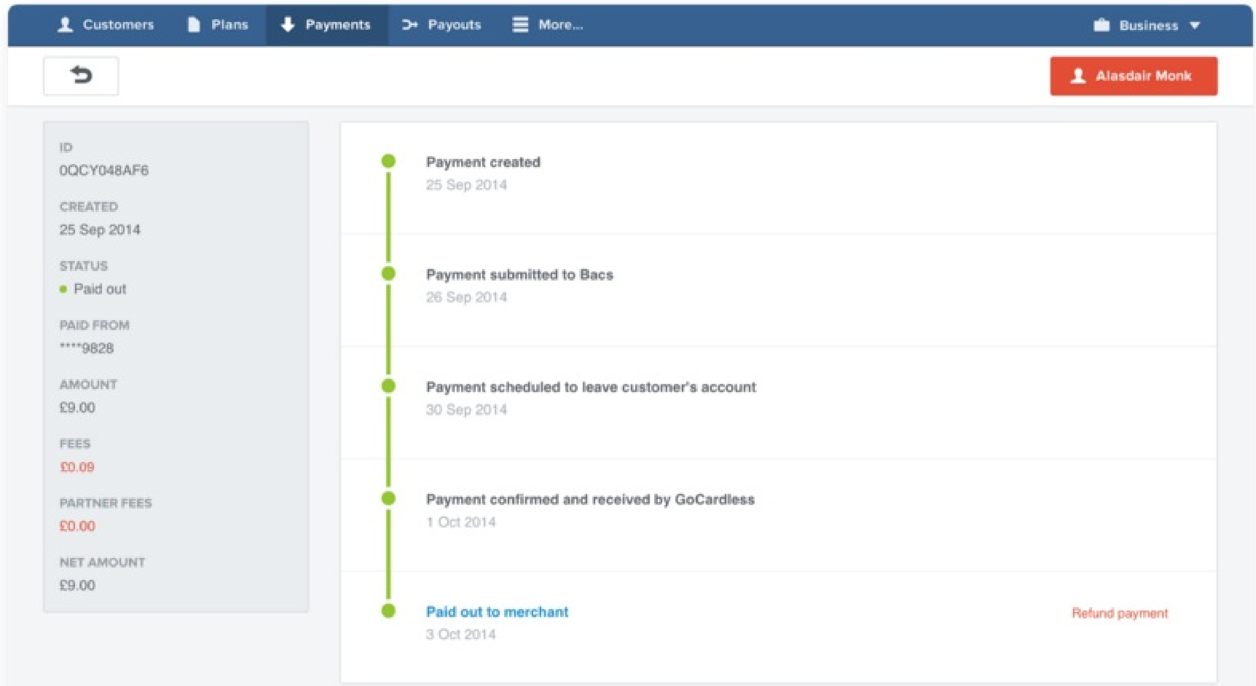
Once you have signed up to GoCardless, the hirer will have the option on the bottom of their invoice to pay by GoCardless. Once they click to initiate the payment, it takes 3-4 days for the funds to be collected from the hirers bank account, then a further 3-4 days for the funds to be deposited into your bank account. The payment will show immediately on BookingsPlus, the payment status will be 'Pending' until the funds are received in your account. Once the funds have been deposited to your account, you will receive a summary email from GoCardless stating the client breakdown.

The funds are paid to you net of the GoCardless fees. As of 1st February 2020 the fees are 1% of the transaction value plus 20p but capped at £4.00 For transactions of £2,000 or more there is an additional fee of 0.3% on the portion of the transaction above the £2,000 threshold.

The maximum amount that can be collected in one transaction is £5,000.

GoCardless is covered by the Direct Debit scheme, which can be a reassurance to hirers. You are unable to collect funds automatically each month, the hirer has to authorise the payment by choosing to pay their invoice each time one is raised.

You will have online access to your GoCardless account, so you can check the status of payments as needed. You can login directly to the GoCardless account at: https://gocardless.com/users/sign_in



Please note that GoCardless now have to charge VAT on all of their fees. BookingsPlus states GoCardless fees excluding the VAT.

Online payment options

Last Modified on 11/01/2024 9:34 am GMT

Online payments are an integral part of BookingsPlus

It not only makes it easier for your hirers, it reduces your administration, requiring no further interaction from yourselves from the point you raise the invoice until the money arrives in your bank account.

Once your payment options are enabled, the hirer will have the option at the bottom of their invoices to make an online payment. They can only pay the amount which appears on the invoice, so make sure you are billing on the correct basis and also that all payments/credit notes have been allocated.

We do realise that different venues have different requirements, so we have 2 online payment options available within BookingsPlus - Stripe & GoCardless.

Both have different features & pricing, so feel free to take a look at each of the Pricing Pages below to think about what would suit your venue best:

Stripe Pricing

GoCardless Pricing

Payment Gateway Setup

Please note: You must be assigned to the role of Master Venue Admin to setup a payment gateway

Setting up your chosen payment gateway is a process your venue must undertake since it requires your bank details to connect to BookingsPlus. This ensures your hirer's invoice payments are transferred directly to your bank account.

To set up your chosen payment gateway please log into your BookingsPlus account and go to:

- **Manage > Edit Venue > Payment Gateways**
- Select the button **[Add Payment Gateway]**
- Select the payment gateway you wish to proceed with
- Follow the instructions to set up and link your new account

At this stage, very basic details are entered, which enables you to set up your online account. From this point onwards, you can take online payments and the link will appear on the bottom of each customer's invoice. The next step is to verify the account. You will receive emails from your chosen payment provider on how to proceed. You can also use their online account to upload any documents or check progress. Please note that no funds will be transferred into your venue account until this verification process has been fully completed.

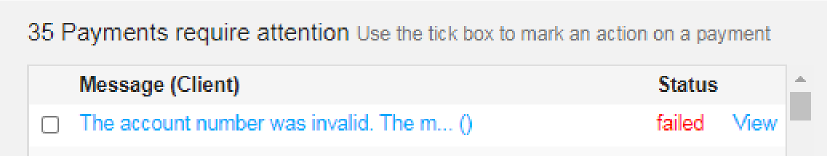
Failed Payment

Last Modified on 06/11/2020 5:17 pm GMT

When a payment fails there are a few key steps you need to take.

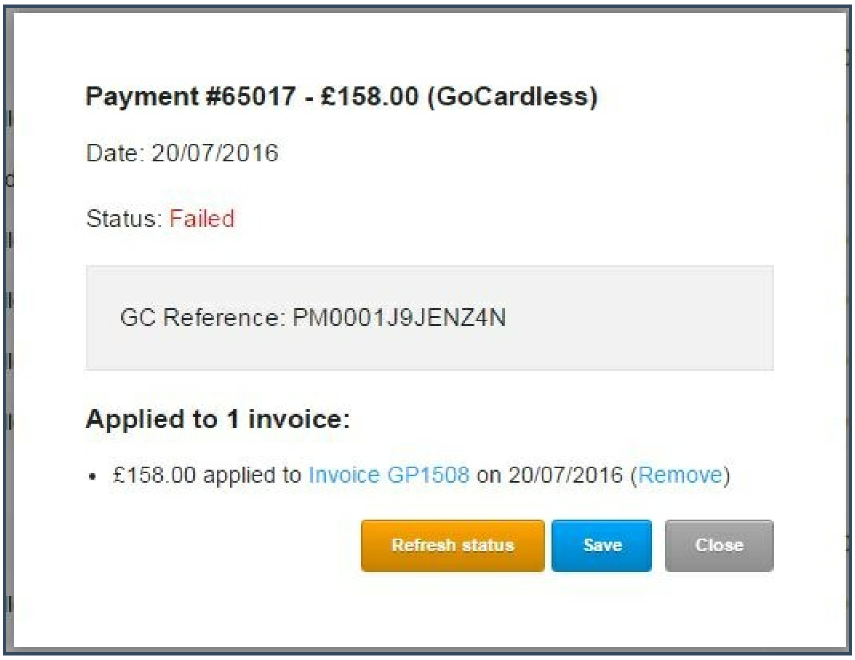
All payments made via GoCardless can take up to 10 working days to clear from Pending to Paid. It is most likely that the payment will fail at the end of this process, as it is at this point that they are being verified by the bank. Take a look at our article for further information about GoCardless.

When a payment fails you will be notified via an email from GoCardless and you will also be flagged up to the payment failure on the Dashboard in the New & Potential Business section, as well as the Payments requiring attention section.



At this point your client will also receive an email notifying them of the failed payment, and the reason it failed.

You can view the failed payment via the View hyperlink on the Dashboard (in the Payments requiring attention section), in clients account page or via the payments tab. It is very important at this stage to un-allocate the failed payment from the invoice, otherwise your client will not be able to re-make the payment for the invoice. Do this by clicking on the payment and removing it from the invoice via the blue remove link.



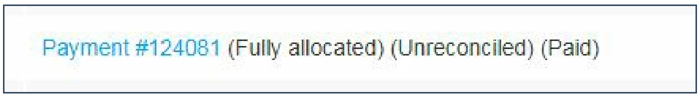
You can now get in touch with the client to advise them that they need to re-make the payment as soon as possible in order for their booking to go ahead.

Correcting a manual payment and Refunds

Last Modified on 18/02/2022 2:53 pm GMT

If you incorrectly enter a manual payment this cannot be deleted, for audit reasons. To remove the credit balance from the clients accounts, you will need to create a refund.

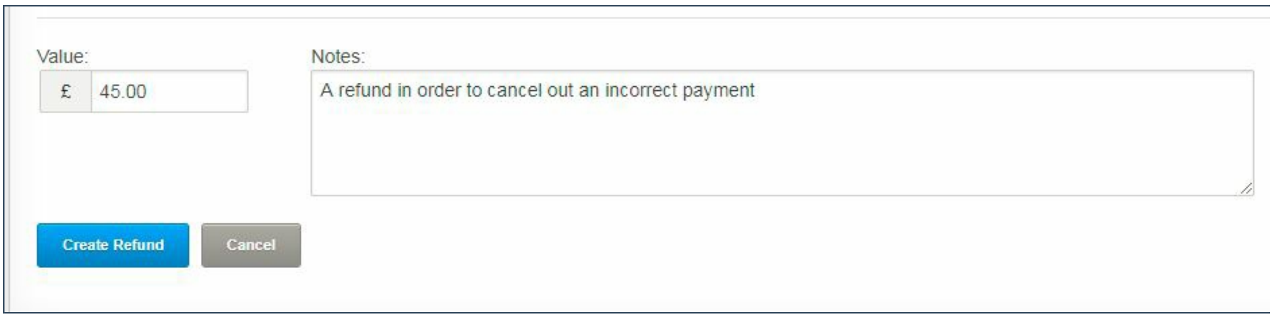
The first step is to ensure the payment is not allocated to an invoice. You can see this by looking at the payment on the Clients account:



To un-allocate it click on the 'payment'. A pop-up box will appear. On the pop-up box you will see a blue 'Remove' link next to the invoice it is allocated to. Click 'Remove' to un-allocate it from the invoice.

You will then need to create a manual refund with the exact same value as the payment. The 

button can be found at the bottom of the Client's account page. Enter the value and in the Notes box write that it is 'A refund in order to cancel out an incorrect payment' and write the date for an audit trail. Then click 



You will now need to allocate this to the payment. Again on the client's account page, click on the 'payment' and under the header 'apply to refund' select the refund you just created from the drop down box and click 

You will then be able to raise a new correct manual payment and re-allocate to the invoice.

Watch our video tutorial on how to apply a refund to a hirers account:

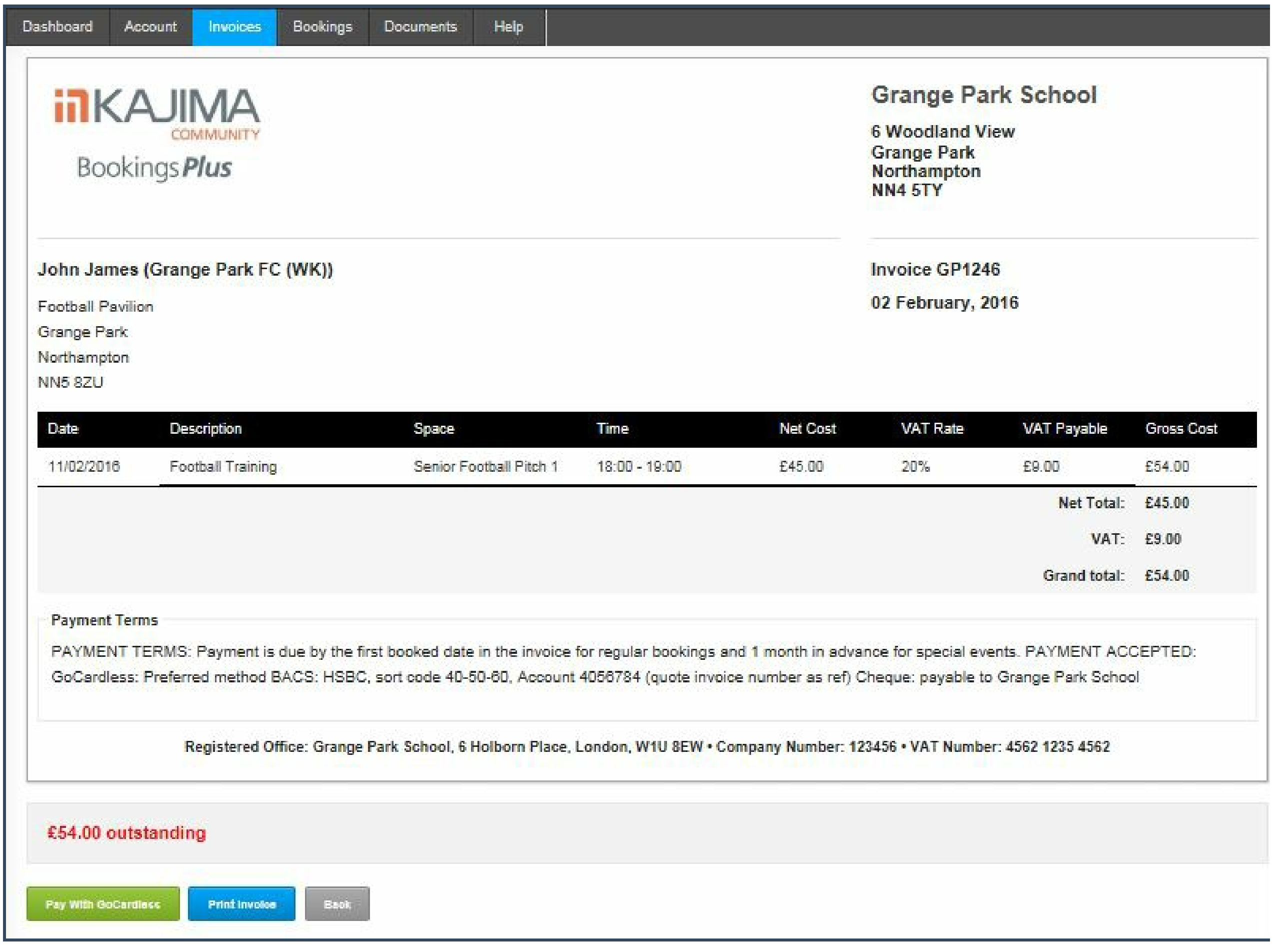
Paying an invoice by GoCardless (Hirer)

Last Modified on 14/01/2021 3:33 pm GMT

Paying an Invoice on BookingsPlus is easy with our built in payment gateways. Choose from **GoCardless** or **Stripe** (or both!) to make collecting payments more efficient for you and your clients.

Remember that only the full invoice amount can be paid, so make sure the billing period matches their payment agreement & that any Credit Notes or previous Payments have been Fully Allocated.

GoCardless - See GoCardless for more information on how GoCardless processes payments, and the associated fees.

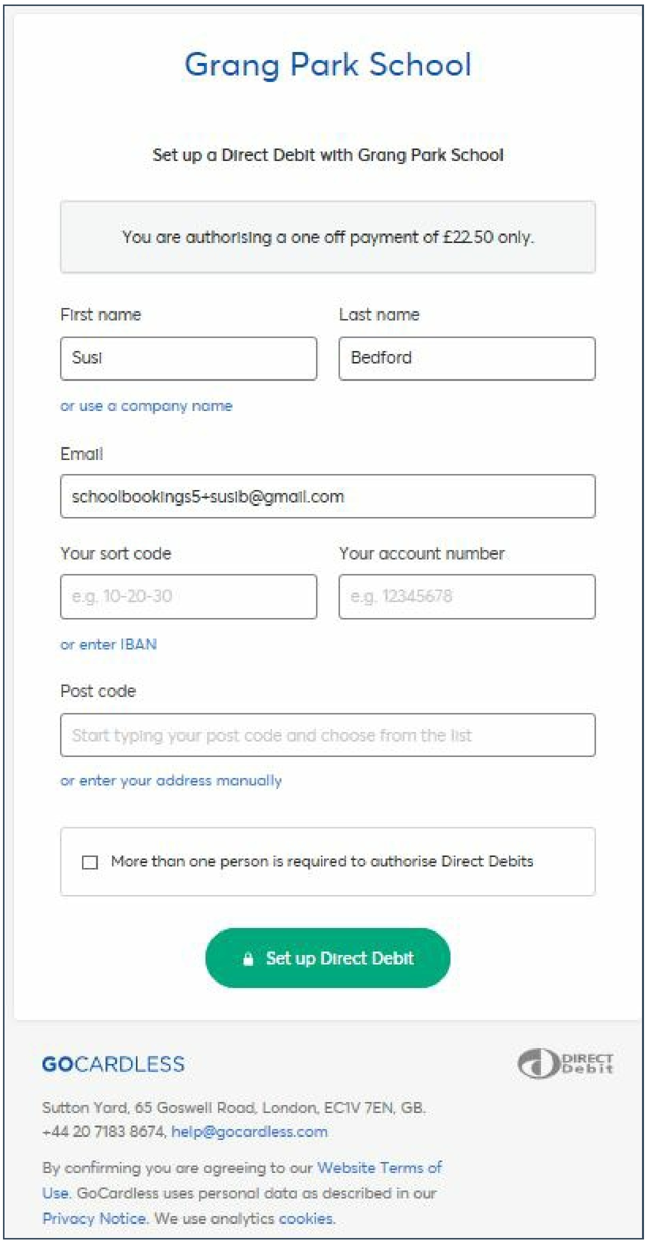


After selecting the "Pay with GoCardless" button, your hirer will need to fill out a form, and click 'Set up Direct Debit' to initiate the payment.

The direct debit set-up relates to this payment only, and no further funds will be taken.

GoCardless will then create a mandate so that on subsequent occasions that they click to make a payment they will not need to fill out their Account details (as stated to the client on the pop-up above which will appear before the below form).

Each time you request a payment, the hirer will need to authorise the payment by clicking to "Pay with GoCardless" on their invoice.



Once they click on the 'Set up Direct Debit' option, a confirmation screen will appear. Once completed, the invoice will immediately show as 'Pending' on both their account & the administrator account.

Hirers do need to be aware that although they have authorised the transaction, the money is only collected by GoCardless after 3-4 days. They must ensure funds are available at this stage, otherwise the payment will fail (should this occur, you will receive notification from GoCardless, and a note will flag on your "Dashboard" via the 'Payments Requiring Attention section').

If they need to change the account details stored with GoCardless, they can either cancel the mandate with their bank, or a venue Administrator can cancel the mandate from within their GoCardless account.

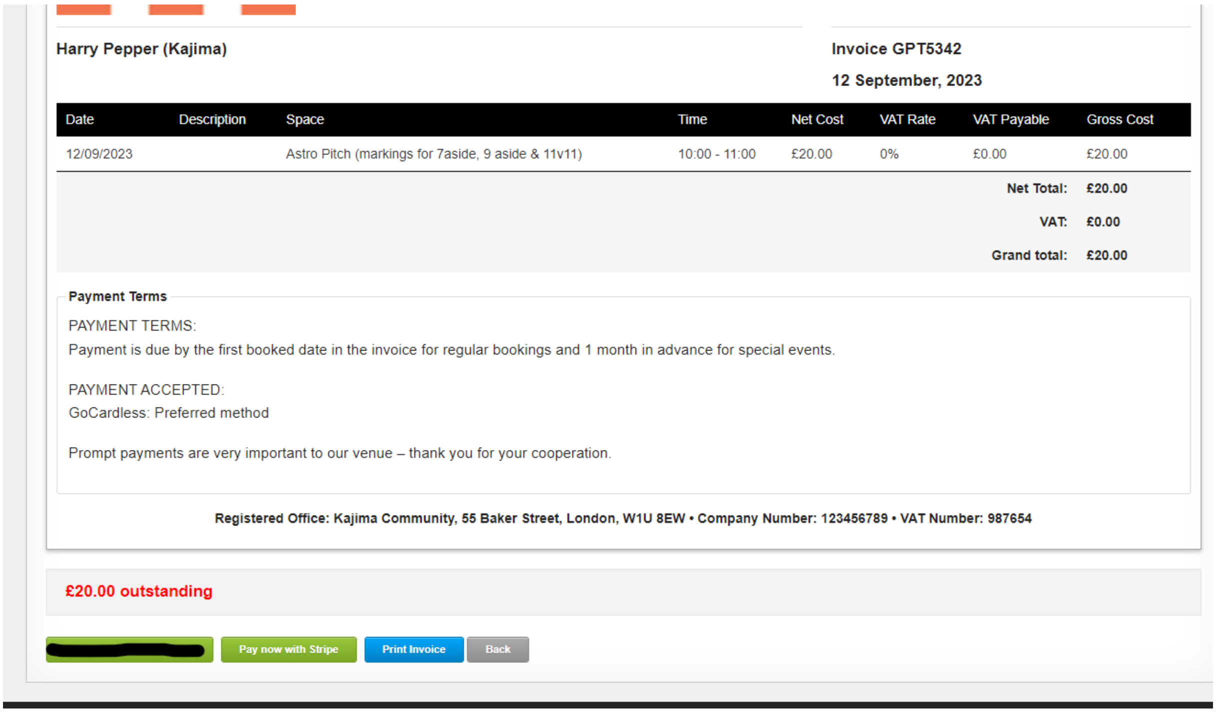
Payments from double signatory accounts:
Payments from accounts with double signatories are accepted with GoCardless, and your hirer will need to tick the relevant box in the form above.

They will then be sent a mandate (via email) from GoCardless to fill out, which will require 2

signatories. Once they send this back to GoCardless, the mandate will be matched to the payment, and the payment will then be processed by GoCardless.

This mandate can then be used for future payments, so that the hirer does not need to fill out the form each time they make a payment.

Stripe -



Harry Pepper (Kajima)

Invoice GPT5342

12 September, 2023

Date	Description	Space	Time	Net Cost	VAT Rate	VAT Payable	Gross Cost
12/09/2023		Astro Pitch (markings for 7aside, 9 aside & 11v11)	10:00 - 11:00	£20.00	0%	£0.00	£20.00
						Net Total:	**£20.00**
						VAT:	**£0.00**
						Grand total:	**£20.00**

Payment Terms

PAYMENT TERMS:
Payment is due by the first booked date in the invoice for regular bookings and 1 month in advance for special events.

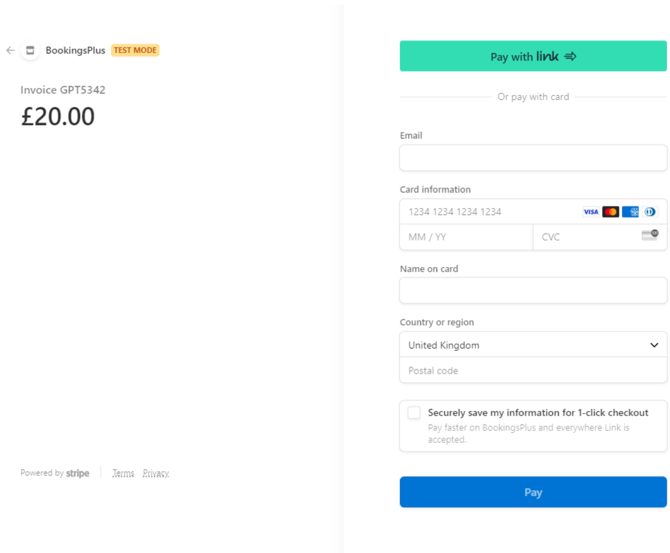
PAYMENT ACCEPTED:
GoCardless: Preferred method

Prompt payments are very important to our venue – thank you for your cooperation.

Registered Office: Kajima Community, 55 Baker Street, London, W1U 8EW • Company Number: 123456789 • VAT Number: 987654

£20.00 outstanding

[redacted] Pay now with Stripe Print Invoice Back



Once the "Pay now with Stripe" option is selected, clients will be taken to a form to enter their debit

card details. Here they'll also see the option to securely save their information for 1-click checkout in future.

If that option is selected, any future times that the client selects "Pay now with Stripe", the payment will process using their saved card.

Should your client ever wish to change/update that card, the "customer" can be deleted from your 'Stripe' login, and the next time they go to make a payment they'll be prompted to enter new details.

Payments made with 'Stripe' process immediately, so if there are issues such as insufficient funds or incorrectly entered card details, these will be flagged immediately to the customer to rectify.

After payment has been made, the status of the payment will immediately be 'Paid', with the 'Pending' flag not applicable.

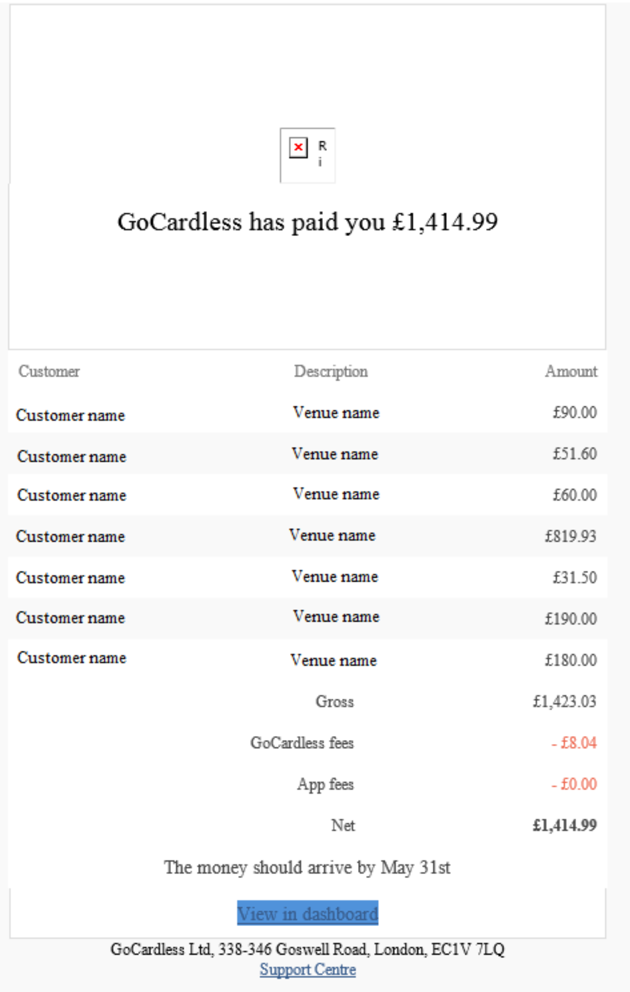
GoCardless Invoice Information

Last Modified on 03/02/2021 5:40 pm GMT

GoCardless Invoice Information.

As GoCardless charge a fee that is taken out per transaction, the amount that you receive into you bank will not match the amount you invoiced the customer. Therefore, it can be useful to know exactly what amount you are expecting and how much has been charged from GoCardless.

You don’t get a physical invoice from GoCardless, but you will get an email with the following information daily (or when clients make payments), see example below.


GoCardless has paid you £1,414.99

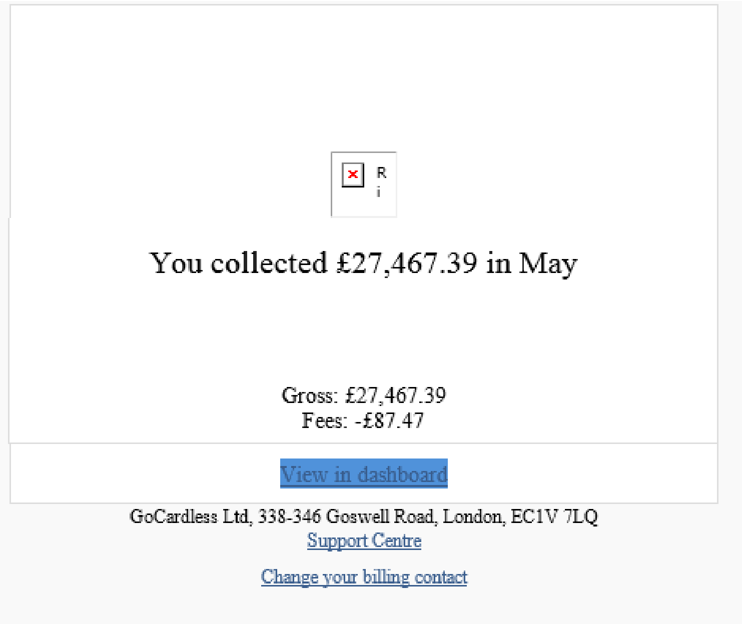
Customer	Description	Amount
Customer name	Venue name	£90.00
Customer name	Venue name	£51.60
Customer name	Venue name	£60.00
Customer name	Venue name	£819.93
Customer name	Venue name	£31.50
Customer name	Venue name	£190.00
Customer name	Venue name	£180.00
	Gross	£1,423.03
	GoCardless fees	- £8.04
	App fees	- £0.00
	Net	**£1,414.99**

The money should arrive by May 31st

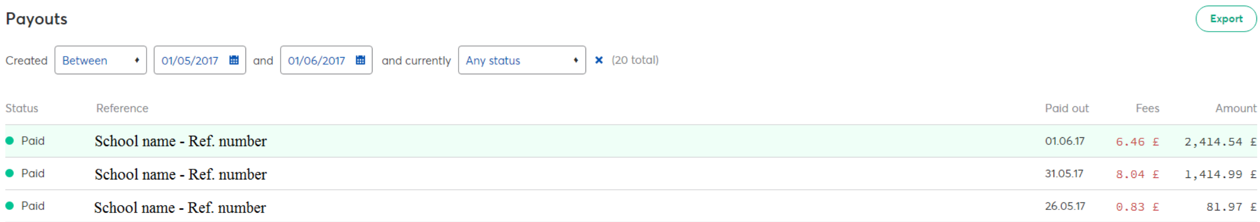
View in dashboard

GoCardless Ltd, 338-346 Goswell Road, London, EC1V 7LQ
Support Centre

You will also receive an email monthly showing how much you have ‘collected’.



If you click ‘view in dashboard’ this will take you to GoCardless where you can see all the payments and the fees taken for the month.



Status	Reference	Paid out	Fees	Amount
Paid	School name - Ref. number	01.06.17	6.46 £	2,414.54 £
Paid	School name - Ref. number	31.05.17	8.04 £	1,414.99 £
Paid	School name - Ref. number	26.05.17	0.83 £	81.97 £

You can also export this information into excel using the ‘export’ button in the top right hand corner.

Please note that GoCardless has to charge VAT on their fees. The fees stated in BookingsPlus exclude the VAT.

Deposits and Refunds

Last Modified on 06/11/2020 5:23 pm GMT

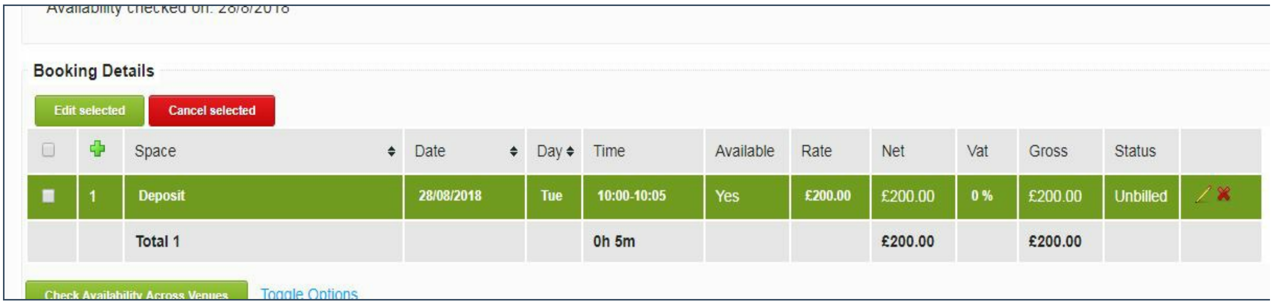
Deposits:

There are two ways you can take a deposit depending on whether you are taking a part-payment deposit or a security deposit. A part-payment deposit is taken when the booking is initially confirmed, and will not be refunded as it is a part-payment of the booking. A security deposit will be refunded after the booking once it has been agreed that there are no damages or charges for over-run of booked time.

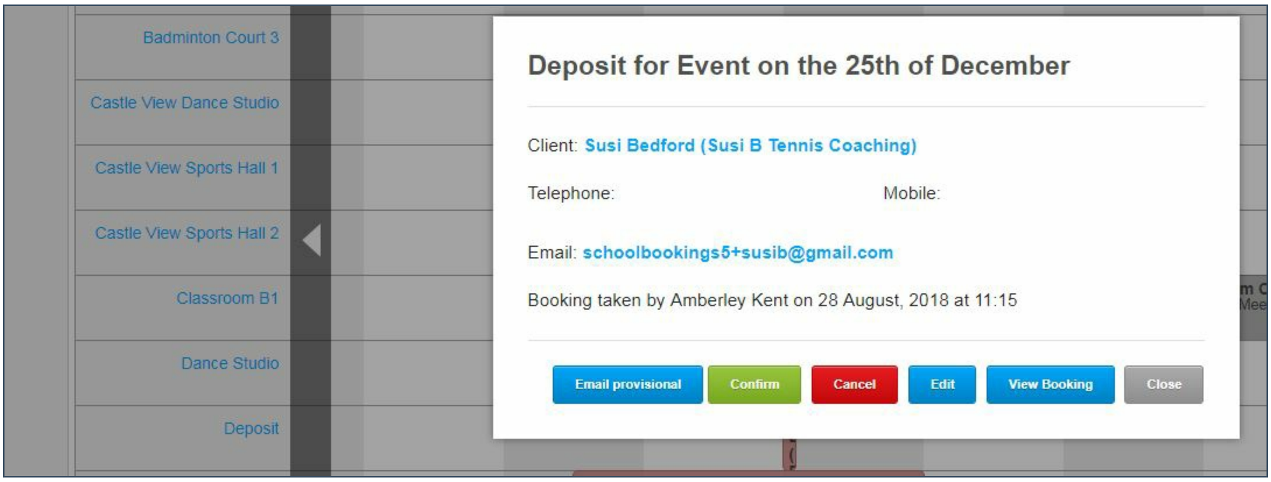
Method 1 - Part-Payment deposit.

Example: You have a booking worth £1000 and would like to take an initial deposit payment of £200 on creation of the booking. If you haven't already, create a new Calendar Space in the Manage Tab called Deposits; you can do this in the Venue Management tab. Scroll down to Bookable Spaces and click New Space.

Edit the actual booking value to £800 and then create a new booking in the Deposit space for the £200 up front payment. We would advise using Fixed Cost and inputting this as a 5 minute booking. This will need to be on a different date to the actual booking in order to invoice these payments separately, so we advise inputting the deposit on the date you are taking the payment.



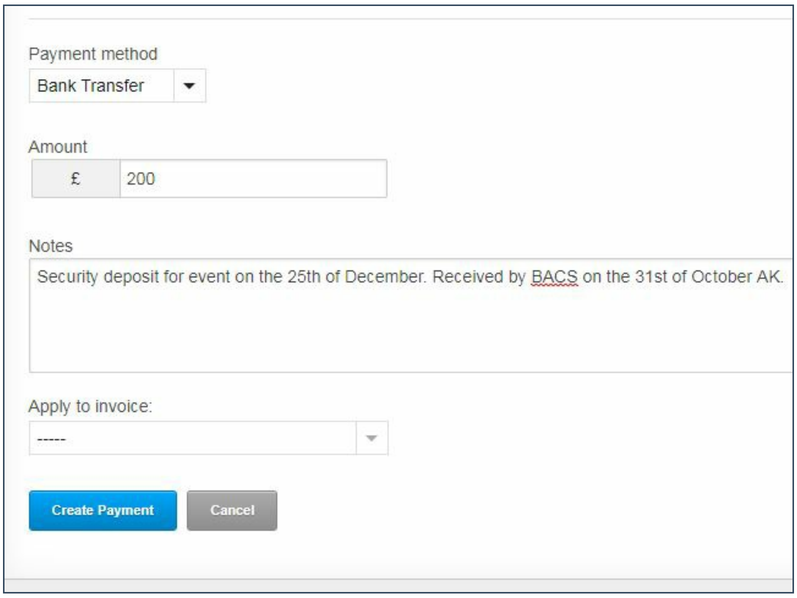
You can then confirm the deposit booking yourself from the calendar...



... and invoice from the bottom of the clients account. The Payment can then be collected via GoCardless or Stripe via the clients login. The rest of the £800 can then be invoiced separately when required (or in your invoice run).

Method 2 - A Refundable security deposit

Example: You have a booking of £1000 and would like to take an additional £200 as a security deposit in case of a cancellation or any damages/additional cleaning/over-running. In this case, as you are not able to create manual invoices for refundable deposits we would advise taking a BACS payment outside of BookingsPlus. You can then record this on the system using the New Payment button at the bottom of the Clients account.

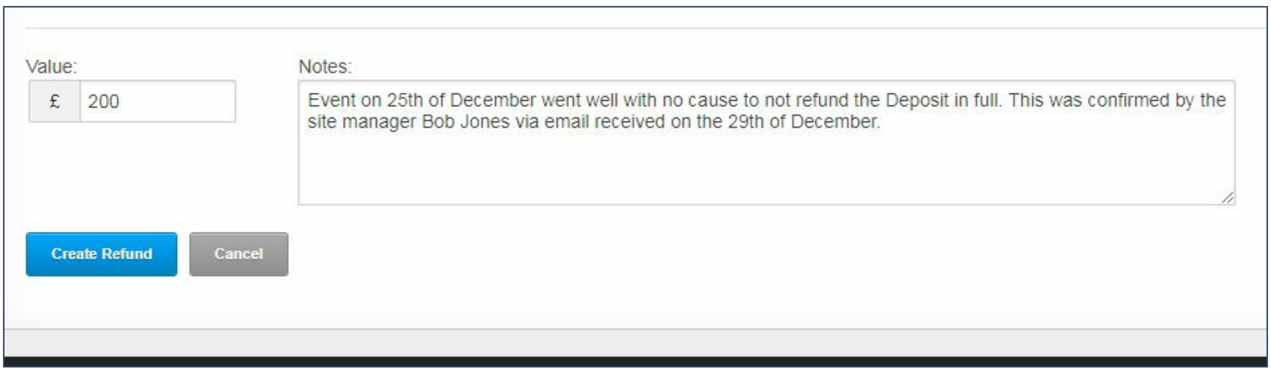


Once created do not allocate this to any invoices.

It is always best practice to write as many notes on this as possible for audit purposes with details such as who the payment was taken by, the date and an indication that it is a security deposit that will be refunded (providing there are no additional charges incurred during the booking).

Refunds:

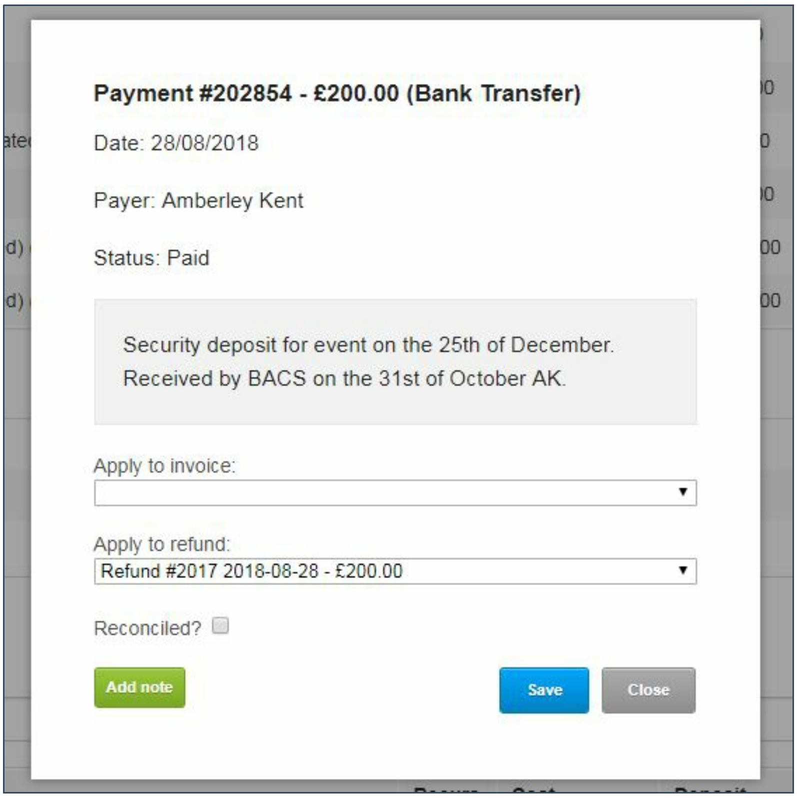
In the above scenario, if the event went well you are now looking to return the security deposit. This can be recorded on the system using the New Refund button at the bottom of the clients account -



Again it is best to keep your notes as detailed as possible including stating who on the site team confirmed that no additional charges are needed and when this was confirmed.

You will then need to ensure that the payment is allocated to the refund. To do this click on the

Payment on the Clients page (in the Account Activity section) and allocate from the Refunds drop down.



Please note - this only records that the money will be refunded - you will then need to request the bank details from your client and make a BACS payment from your bank account to them. Payments cannot be refunded by GoCardless - hence why we advise not raising a booking and invoice (as in Method 1) for any refundable deposit payments.

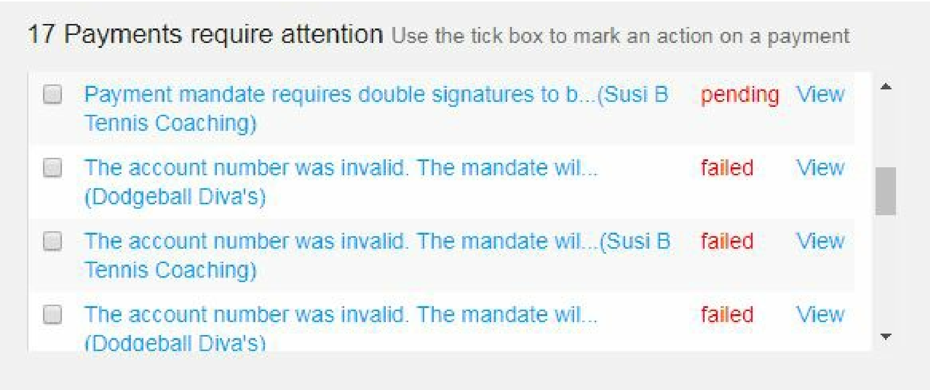
Watch our video tutorial on how to apply a refund to a hirers account:

Payments requiring attention

Last Modified on 29/10/2020 4:02 pm GMT

Payments Dashboard feature

You are able to easily track payments made through GoCardless or Stripe that have either failed, been cancelled, or require double signatures.



This table works in a very similar way to the ‘Bookings due for renewal’ feature that is found in the bottom right hand side of the screen, in that you can tick tasks off to remove them once the action has been completed. If you mark a failed or cancelled payment as 'actioned', they will disappear off the list.

Pending payments will not disappear off the list until they turn to 'paid' but will be scored through so you know that you have actioned them. You can also click View to see the payment pop-up for further information.

The actions that need to be completed will depend on the Status; if it is a failed or cancelled payment, you will need to un-allocate the payment from the invoice so that the client is able to remake the payment. Once a payment has failed or been cancelled the client will be notified of this so you will want to make the invoice payable as soon as possible. You may also want to alert the client yourself to ensure they re-make the payment promptly.

'Pending' payments that have been paid out, or 'Failed' payments that have been unallocated, may sometimes still show in this section. These can be updated and removed by using the 

button. This option shows after you select the view link.

If the status is Pending and the message mentions ‘double signatures’ then the client will have ticked a box when making the payment to state that more than one person is required to authorise this payment. The payment will remain pending until the client fills in a form that GoCardless will have emailed over to them. In this instance you will want to get in touch with the client to ensure this form has been received, filled out and sent back. You can then tick the item on the dashboard - it will stay but it is a good way to show that the client has been contacted with regards to that payment.

If the client has not received this form, has any questions, or ticked the box in error, you can sign into your GoCardless dashboard and choose to resend the double signatory email, or cancel the relevant payment.

If you are still experiencing issues, you/your client will need to contact GoCardless to resolve this. GoCardless can be contacted at 020 8338 9538, help@gocardless.com.

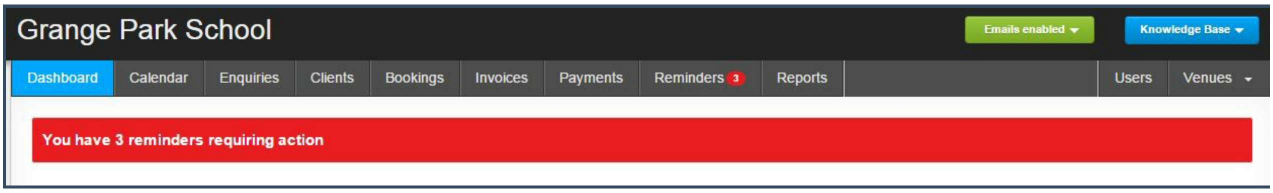
NOTE: Only payments (that require attention) made since the 1st January 2018 are displayed on the dashboard.

Using reminders

Last Modified on 03/02/2021 5:45 pm GMT

Reminders are a fantastic option within BookingsPlus, allowing you to raise a flag at various places within the system. This means that all actions are captured in one place & also means that actions are not missed in the event of holiday/sickness.

When any administrator logs onto the Dashboard, they will see a banner across the page alerting to the reminders which are due. Alongside the [**Reminder**] tab, there is also a number to indicate the reminders either due or overdue.



Click onto the [**Reminders**] tab & there is a more detailed view of the reminders set.

Reminders can be set by clicking 

in the following places:

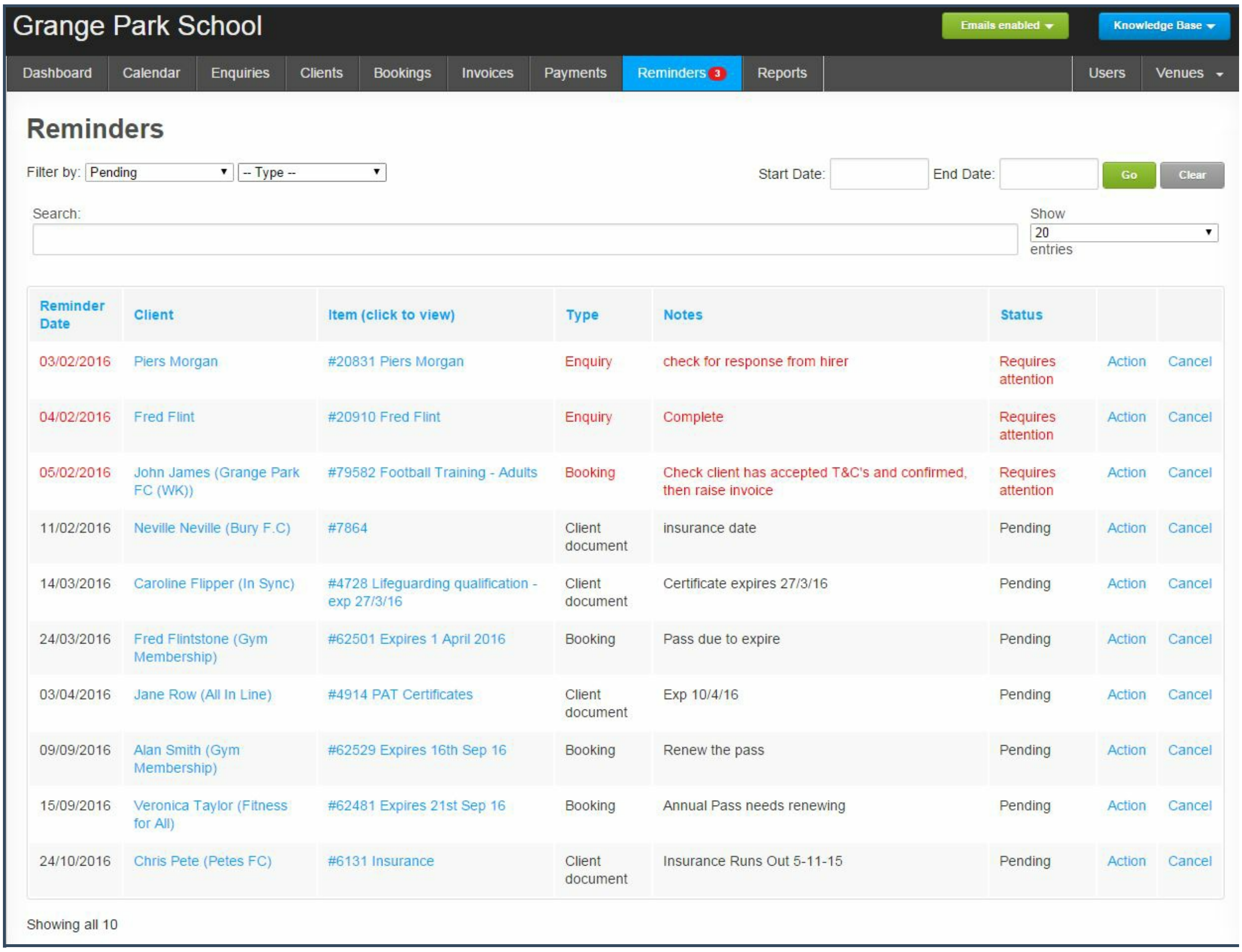
- Client level (top right hand side)

- Invoice level (bottom Right hand side of invoice)

- Booking level (bottom of booking form while creating, top of booking form once booking has been made)

- Enquiry level (either select 'Follow-Up required or choose option at bottom of Enquiry form)

- Document level (option when uploading document)



Reminder Date	Client	Item (click to view)	Type	Notes	Status		
03/02/2016	Piers Morgan	#20831 Piers Morgan	Enquiry	check for response from hirer	Requires attention	Action	Cancel
04/02/2016	Fred Flint	#20910 Fred Flint	Enquiry	Complete	Requires attention	Action	Cancel
05/02/2016	John James (Grange Park FC (WK))	#79582 Football Training - Adults	Booking	Check client has accepted T&C's and confirmed, then raise invoice	Requires attention	Action	Cancel
11/02/2016	Neville Neville (Bury F.C)	#7864	Client document	insurance date	Pending	Action	Cancel
14/03/2016	Caroline Flipper (In Sync)	#4728 Lifeguarding qualification - exp 27/3/16	Client document	Certificate expires 27/3/16	Pending	Action	Cancel
24/03/2016	Fred Flintstone (Gym Membership)	#62501 Expires 1 April 2016	Booking	Pass due to expire	Pending	Action	Cancel
03/04/2016	Jane Row (All In Line)	#4914 PAT Certificates	Client document	Exp 10/4/16	Pending	Action	Cancel
09/09/2016	Alan Smith (Gym Membership)	#62529 Expires 16th Sep 16	Booking	Renew the pass	Pending	Action	Cancel
15/09/2016	Veronica Taylor (Fitness for All)	#62481 Expires 21st Sep 16	Booking	Annual Pass needs renewing	Pending	Action	Cancel
24/10/2016	Chris Pete (Petes FC)	#6131 Insurance	Client document	Insurance Runs Out 5-11-15	Pending	Action	Cancel

Showing all 10

From this page, all reminders have the option to **Action** or **Cancel.**

If necessary, the date on the reminder can be put forward. This will then remove the reminder from the Overdue list & change status back to Pending.

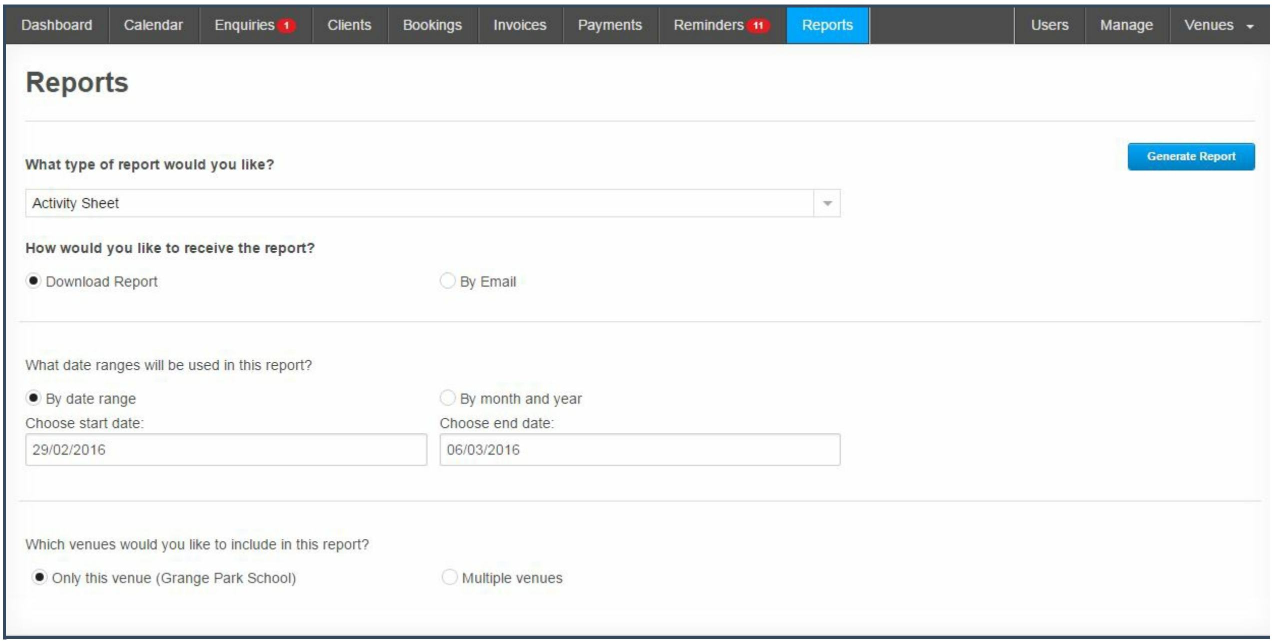
To close a reminder, click **Action** and input what action has been taken.

The [**Reminders**] tab can be sorted by status & type (useful if chasing outstanding documents). It can also be filtered by date if required.

General report information

Last Modified on 03/02/2021 5:46 pm GMT

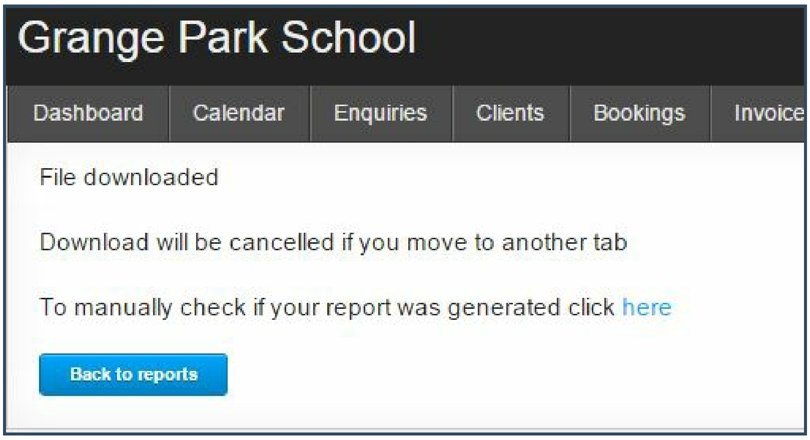
BookingsPlus has a full reporting suite providing information on your bookings, client information and financials. The reports can be accessed via the [**Reports**] tab.



The drop down box allows you to select the report you wish to run. We would advise familiarising yourself with the many different types of reports that are available. They can either be run for a defined time period, or by selecting a Month.

Once you've selected the report & the time period, click Generate Report

Reports can either be downloaded (as shown below), or sent by email. This can be particularly useful for schools with multiple sites.



The reports download into Excel and will appear in the toolbar at the bottom of your screen once complete. From here, you can click to open the file & save it in a location of your choice.

Activity/Attendance reports are fully formatted for printing. All other reports have column headers and can be filtered & printed as required.

Cancelled Bookings Report

Last Modified on 03/02/2021 5:47 pm GMT

The Cancelled Bookings Report can be generated for any time period you choose, is available to download or email & is also suitable for multi-venue reporting.

Please note that this report only shows confirmed bookings which were cancelled. Any provisional bookings or school bookings will not appear here.

For any cancelled bookings prior to 9th February 2017, the date/reason and person who did the cancellation were not stored within BookingsPlus, therefore this information will not appear on the report.

Utilisation Report

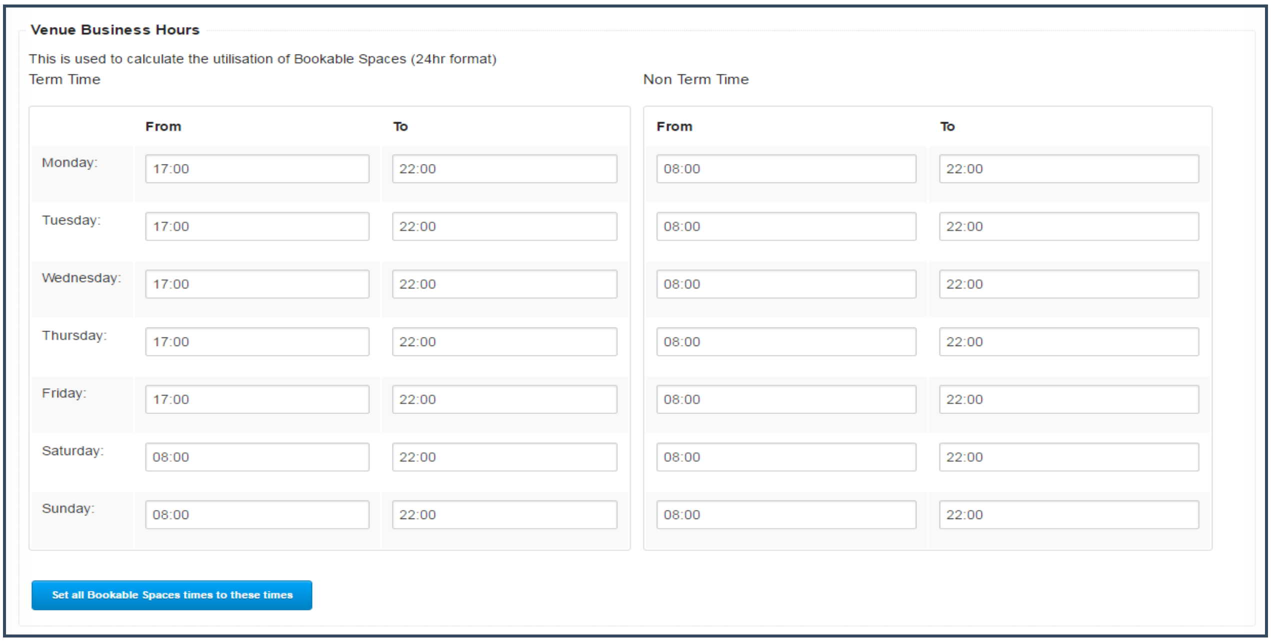
Last Modified on 03/02/2021 5:47 pm GMT

The Utilisation Report has been designed to help you maximise your facilities and your revenue, by allowing you to view usage of your venue across each space.

Within the 'Manage' area of your venue, you will be able to define your opening times and this will calculate the number of hours your venue is potentially open within the report period. By using this & the bookings input into the system, the report will calculate your percentage utilisation.

To be able to use the report, you will need to set up your opening times. Please follow the instructions below:

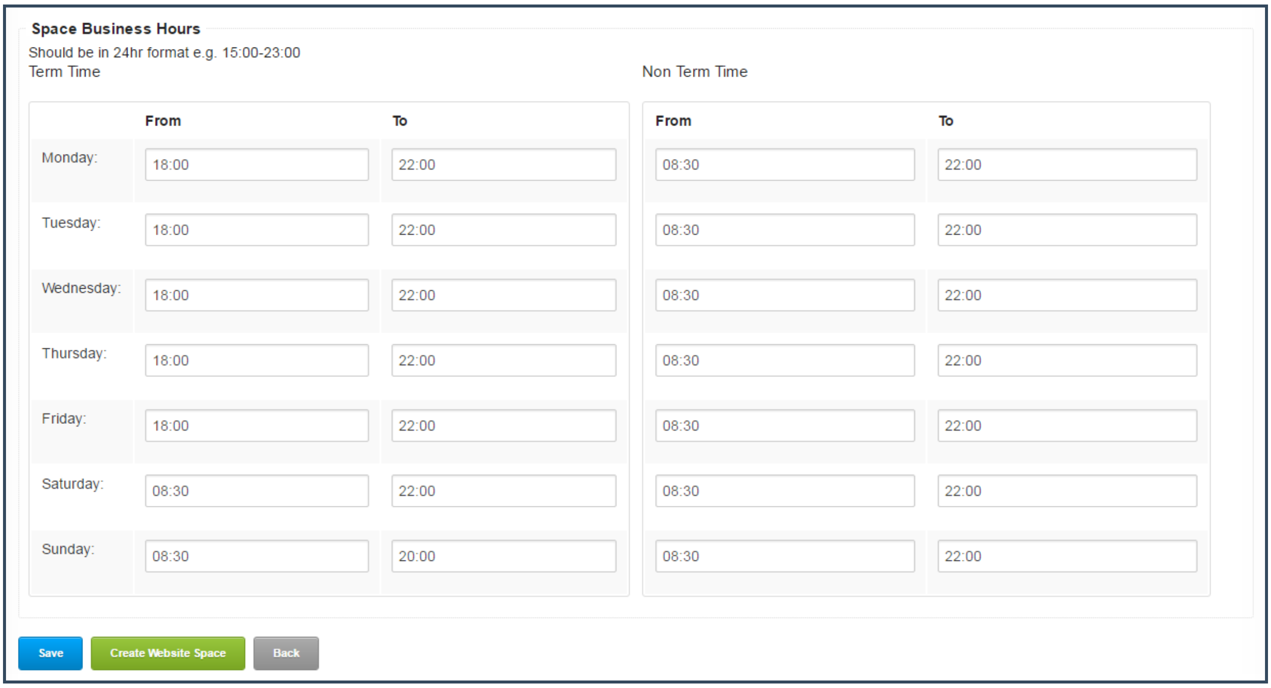
Click the [**Manage**] tab and click the Edit Venue button. From the [Basic Information] tab, scroll down to the Venue Business Hours section. Here you can set your opening times for your venue.   (***Please note*** - if you have added holidays on the [Venue Management] tab, you must include opening hours in the non-term time column.)



Once complete, click Set all Bookable Spaces times to these times and click Save as you normally would at the top right of the screen. These hours will then be replicated against all Bookable Spaces listed under the [Venue Management] tab.

If any spaces deviate from these times (e.g. an outdoor space available earlier than in your main building), you can amend each space individually.

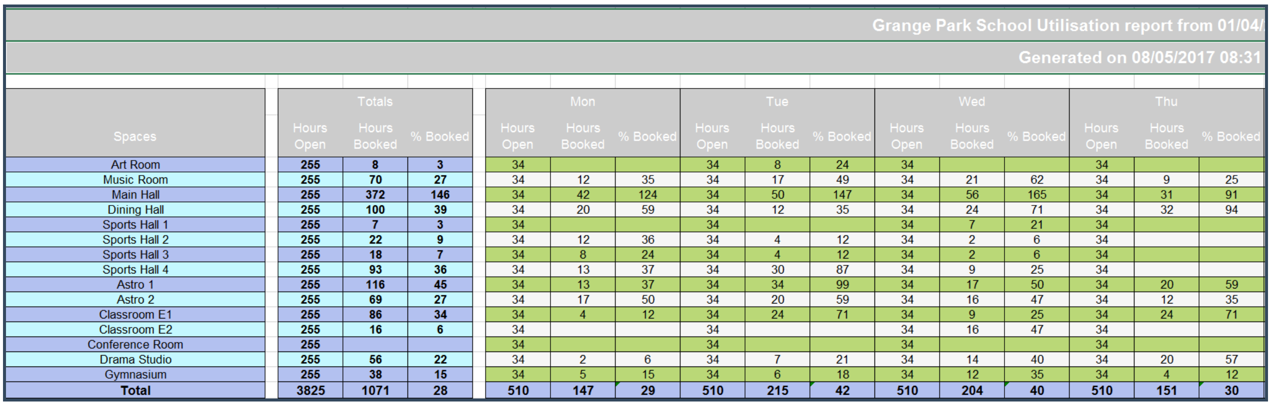
To do this, click Edit Delete the space you wish to edit from the list of Bookable Spaces on the [Venue Management] tab.   Once you've made the amendments required, click Save



The report is available to run from the **Reports**] tab. It can be run for any time period. Please note that provisional bookings and non-billable bookings are included in this report. Any days that have Closures added on the [Venue Management] tab will be excluded from the Hours Open column.

If you wish to run the report for multiple venues, click the 'Multiple Venues' option and select the venues required. Each venue will be shown on a separate tab within the Excel spreadsheet.

A sample of the report is shown below.



Grange Park School Utilisation report from 01/04/

Generated on 08/05/2017 08:31

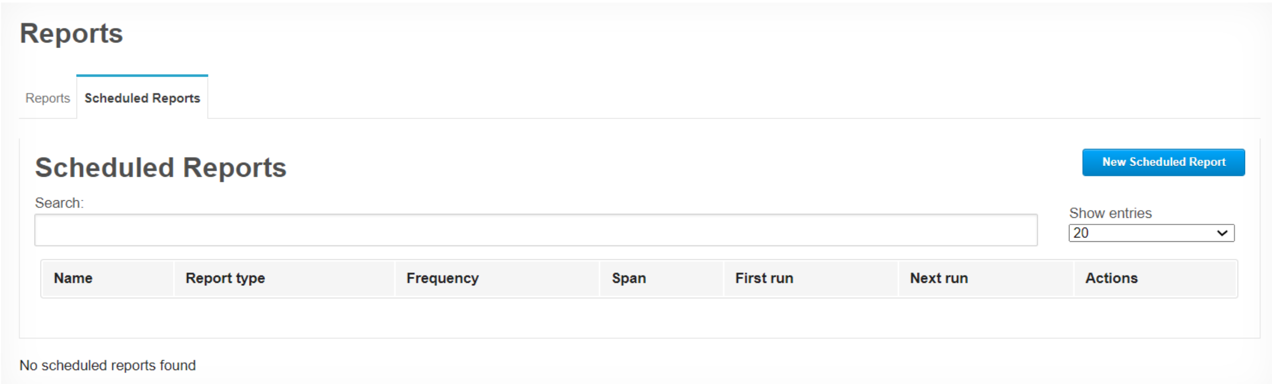
Spaces	Totals			Mon			Tue			Wed			Thu		
	Hours Open	Hours Booked	% Booked	Hours Open	Hours Booked	% Booked	Hours Open	Hours Booked	% Booked	Hours Open	Hours Booked	% Booked	Hours Open	Hours Booked	% Booked
Art Room	255	8	3	34			34	8	24	34			34		
Music Room	255	70	27	34	12	35	34	17	49	34	21	62	34	9	25
Main Hall	255	372	146	34	42	124	34	50	147	34	56	165	34	31	91
Dining Hall	255	100	39	34	20	59	34	12	35	34	24	71	34	32	94
Sports Hall 1	255	7	3	34			34			34	7	21	34		
Sports Hall 2	255	22	9	34	12	36	34	4	12	34	2	6	34		
Sports Hall 3	255	18	7	34	8	24	34	4	12	34	2	6	34		
Sports Hall 4	255	93	36	34	13	37	34	30	87	34	9	25	34		
Astro 1	255	116	45	34	13	37	34	34	99	34	17	50	34	20	59
Astro 2	255	69	27	34	17	50	34	20	59	34	16	47	34	12	35
Classroom E1	255	86	34	34	4	12	34	24	71	34	9	25	34	24	71
Classroom E2	255	16	6	34			34			34	16	47	34		
Conference Room	255			34			34			34			34		
Drama Studio	255	56	22	34	2	6	34	7	21	34	14	40	34	20	57
Gymnasium	255	38	15	34	5	15	34	6	18	34	12	35	34	4	12
Total	**3825**	**1071**	**28**	**510**	**147**	**29**	**510**	**215**	**42**	**510**	**204**	**40**	**510**	**151**	**30**

Scheduled Reports

Last Modified on 12/05/2021 11:07 am BST

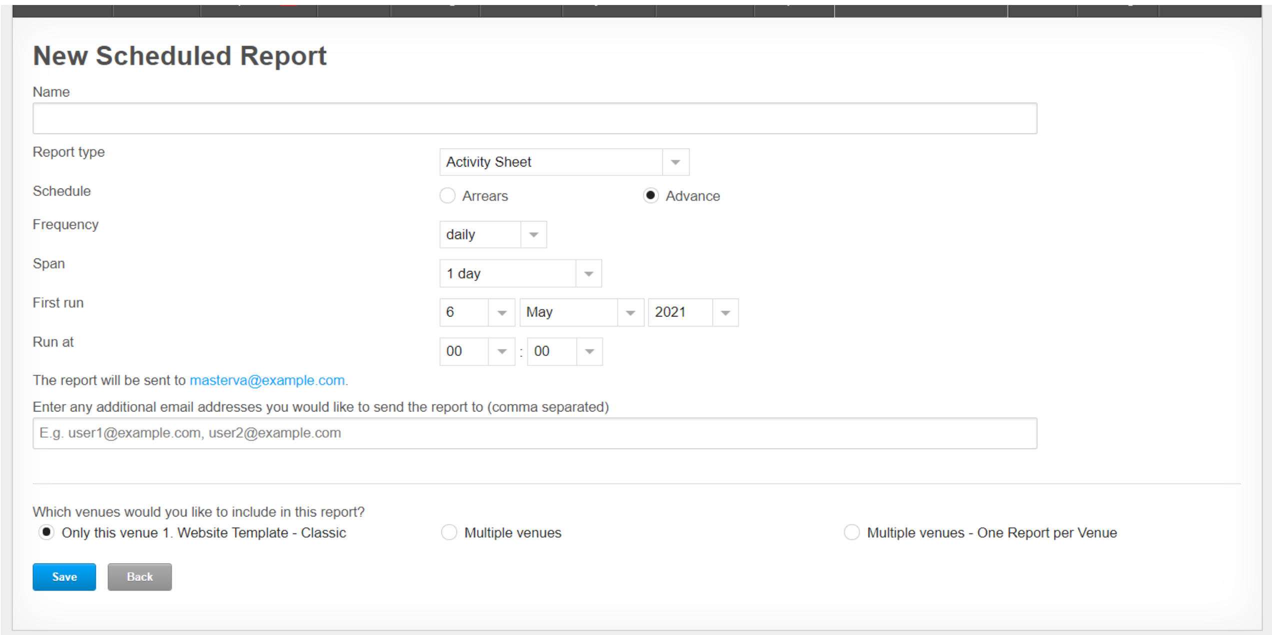
As a Master Venue Admin, you can now set up Scheduled reports at your venue, to run automatically and be sent out to who needs them.

Go to the the Reports tab - and switch to the new sub-tab labelled 'Scheduled Reports'



Here you will be able to see any reports set up by yourself or other Master Venue Admins that have access to your venue.

Click the 'New Scheduled Report' blue button on the top right, and you will be able to see all of your options:

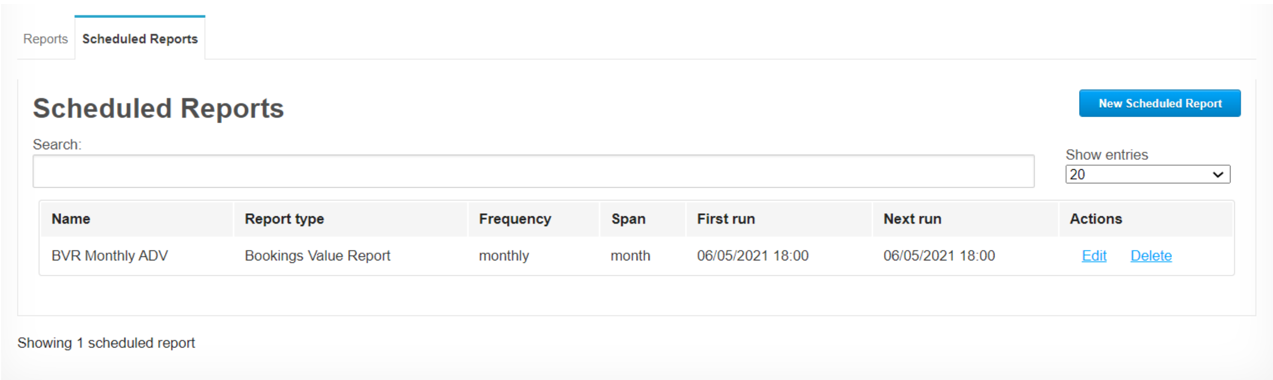


The form allows you to choose a number of different settings to tailor the set to get exactly the information you need:

- Input a unique short **Name** for the report in the first field so that you can quickly and easily identify the type of report set up - e.g. 'BVR Monthly ADV' for a Bookings value report that is set up to run Monthly in Advance. Don't worry about putting too much information in this first field, as once set up, the scheduled reports table will display the type, frequency and span anyway.

- Select the **Report Type** from the drop-down
- For **Schedule,** select if you would like the report to contain dates in the past (Arrears) or dates in the future (Advance)
- For **Frequency,** select how often you would like the report to automatically run.
- Select the **Span** you would like the report to run for. For example, if in 'Schedule' you selected Arrears, and for 'Span' you select 1 day, then when the report runs it will contain data for Yesterday.
- For **First run** and **Run at**, you need to select the first Date and time you would like the report to run on. The times are limited to before 9am and after 5:30pm to ensure that it does not add strain to the system during the working day.
- When this report runs it will be sent to the email address you are logged in with. You can also send it to additional emails using the text box at the bottom of the page. **Each email must be separated with a comma**, e.g. user1@example.com**,** user2@example.com
- Finally, if you have admin access to multiple venues, you will then be given the option to run these for as many of the venues you need by selecting **Multiple Venues**, or **Multiple venues - One Report per Venue** and then selecting the Venues that you need.

Once you are happy with the settings, click Save at the bottom of the page. Your report will now be set up and shown in your venue and you can continue to create any additional reports needed.



You can also edit the report if any of the settings need to be amended; just click Edit, tweak the settings, move the 'First run' date to the next date you need the report to run on, and click Save.

The table below shows what results you can expect for the different settings:

Set up to first run at	**Schedule**	**Time span**	**Report results**
1 Sep	Arrears	1 day	31 Aug
1 Sep	Arrears	1 week	25 - 31 Aug
1 Sep	Arrears	1 fortnight	18 - 31 Aug
1 Sep	Arrears	1 calendar month	1 - 31 Aug

Set up to first run at	Schedule	Time span	Report results
1 Sep 5 Sep	Arrears Arrears	1 month 1 month	1 - 31 Aug 5 Aug - 4 Sep
1 Sep	Arrears	1 quarter	1 Jun - 31 Aug
1 Sep	Advance	1 day	1 Sep
1 Sep	Advance	1 week	1 - 7 Sep
1 Sep	Advance	1 fortnight	1 - 14 Sep
1 Sep	Advance	1 calendar month	1 - 30 Sep
1 Sep 5 Sep	Advance Advance	1 month 1 month	1 - 30 Sep 5 Sep - 4 Oct
1 Sep	Advance	1 quarter	1 Sep - 30 Nov

IRIS Sales Invoice and Credit Note Report Set Up

Last Modified on 18/07/2022 11:36 am BST

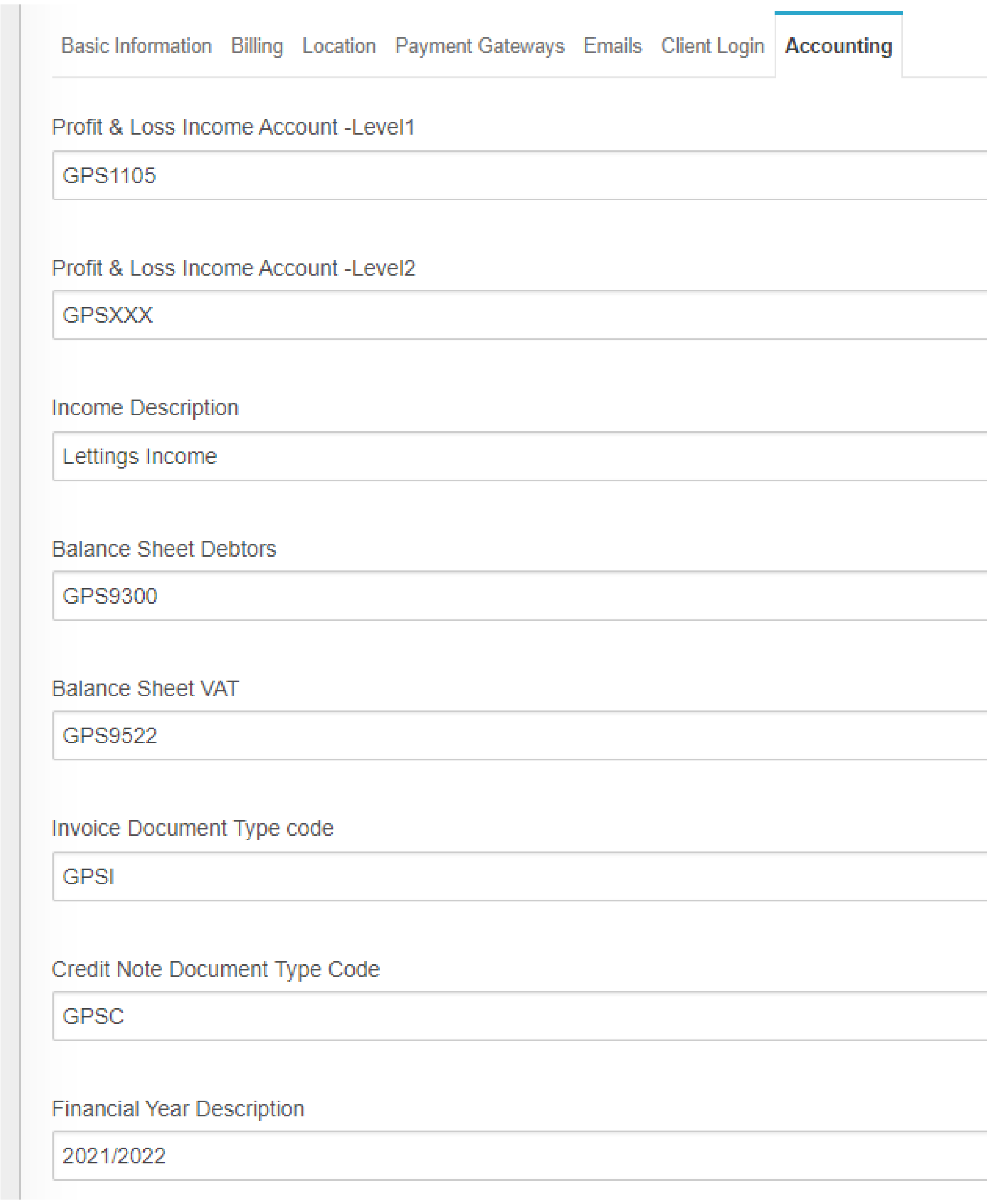
How to set up the IRIS Sales Invoice and Credit Note Report at your venue:

First, get in touch with our customer service team at support@bookingsplus.co.uk, and they will discuss the trial options for the report, and switch on this functionality at your venue.

Once it has been switched on, you will need to go to your Manage Tab - Edit Venue Button - and select the new Accounting sub-tab.

Here you will need to populate all fields on the page to pull through and populate on the report.

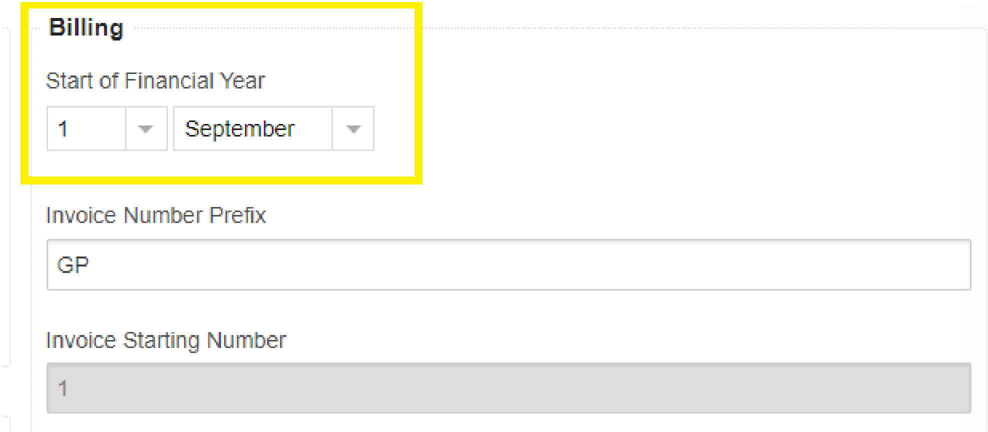
For example:



Next, click on the Billing sub-tab (also within the Edit Venue button) and ensure that the 'Start of

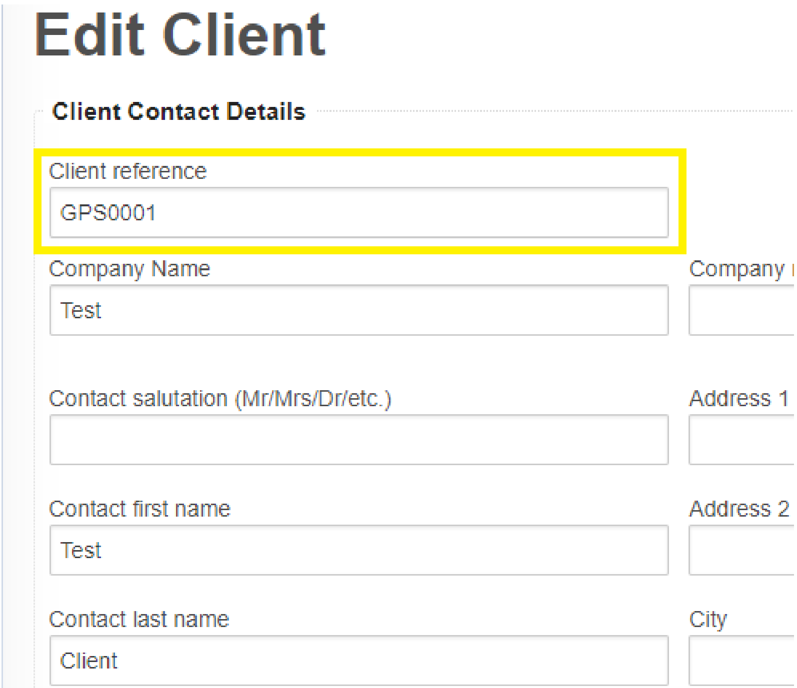
Financial year' is set correctly for the venue.

For example:



Finally, click on the Client's tab and click Edit on a client account. In order to get a client specific reference to populate on the report, you will need to populate the 'Client reference' field for each client account necessary.

For example:



Now you will be able to run the report for up to 12 months. You can run 1 report manually from the reports tab, or set the report up to come through automatically on set dates & times - for information on how to do this, see our Scheduled Reports guide

For manual reports, once you've selected the report in the dropdown, you will notice on the reports tab that you only get the option to receive the report by email. This is as the report may take a few moments to be created by the system, so will be sent to your user email, and any other emails you enter in the CC field.

Please note; if you have Instant Pay set up at your venue, Tentative Invoices and Voided Tentative invoices (when voided by the system as the payment was not received in time) will not show on the report. For further information on Instant Pay, please take a look at our article here.

Also, if at any point you would like to update your Invoice/Credit note prefix in the Billing tab, and would like this prefix to update for all past Invoices/Credit notes on the PSF report, please contact our customer service team on support@bookingsplus.co.uk and we will be able to amend this.

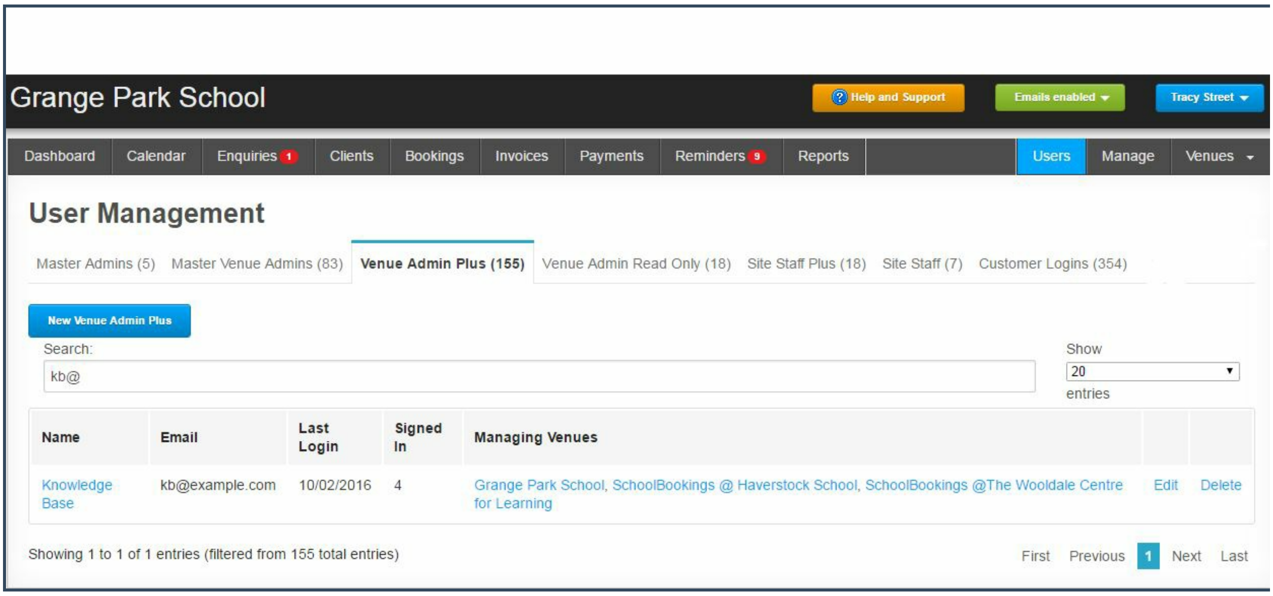
If you have any queries about the report, please don't hesitate to get in touch and we'll be more than happy to help.

User access levels

Last Modified on 18/02/2022 2:51 pm GMT

To allow you to manage access to BookingsPlus, there are a variety of levels of User Access which can be given to your staff.

To set up a new user, click on the Users option at the top right of your screen. This will show the User Management tab, giving access to all the user levels below your own.



This screen has a tab for each level of access. Master Venue Admin & Venue Admin Plus can see all Users set up at a lower level. Other User Levels do not have access to the [**Users**] tab.

There is the facility to search by name if required. The table shows the name, email address, venue access along with the last time they accessed the system.

To amend any details e.g. venues they have access to, or access level click on Edit.

To set up a new user, click on the relevant button and fill in name, email, venue access. Set the password yourself and click Create User

Now let your colleague know where to login (https:\\admin.schoolbookings.co.uk) and the password you've just set up.

Please see below information for full details on each access level.

Levels of Access:

1) Master Venue Admin: This user has access to administer all areas within their venue/s. Master Venue Admin are able to create any of the other types of users for their venue, i.e. Venue Admin Plus, Venue Admin Read Only, Site Staff Plus, Site Staff.

TIP: You cannot use an email for an administrator that has already been used as a customer!

Ideal for: The main Admin user within each venue.

Example: login to admin.schoolbookings.co.uk with the email master@example.com and password BassetCourt12

Set up a new user: To set up a new user, click the Users tab, click the relevant access level tab for the user you want to create and choose to create 'New xxxx'. Enter a first name, last name and email address for the user and tick the venue/s to which they should have access. Enter a password and click 'Create User'.

We recommend that you do not give access as a Venue Admin Plus or a Site Staff Plus to anyone that has NOT been adequately trained on how to use the system.

2) Venue Admin Plus: This user has access to administer all areas, within the venues they are enabled for, including the manage/set-up area. They can run all reports and they are also able to set up new Site Staff Plus and Site Staff Users.

Ideal for: Administrators who handle enquiries, input bookings, do invoicing etc

Example: login to admin.schoolbookings.co.uk with the email vaplus@example.com and password BassetCourt12

3) Venue Admin Read Only: This user can view all areas (including client details) except the manage/set-up areas, but they CANNOT amend any data, add bookings or enquiries etc. It is read only access. They have access to run all reports.

Ideal for: finance staff.

Example: login to admin.schoolbookings.co.uk with the email varead@example.com and password BassetCourt12

4) Site Staff Plus: This user has read only access to the following tabs: Calendar, Enquiries, Clients, Bookings and Reports. They can view all information in these tabs but cannot amend/add/delete anything EXCEPT for enquiries. This user can add new enquiries and amend existing enquiries and can therefore use the availability checker functionality. They cannot delete, close or convert an enquiry to a booking.

The Site Staff Plus user also has access to run the following reports: Activity Sheet, Attendance Sheet, Staffing report, School Hours report. They do not have the ability to 'Export to CSV' from the bookings tab.

Ideal for: Site Staff Supervisors / office staff who deal with enquiries

Example: login to admin.schoolbookings.co.uk with the email sitestaffplus@example.com and password BassetCourt12

5) Site Staff: This user can only view the calendar tab and cannot edit or amend anything. They can switch to different dates and choose different categories on the calendar. They can click a booking and see the clients name, organisation, description of the booking, and the administrator who took the booking, but cannot view client contact details. They can see from the calendar whether the booking is provisional or confirmed or a school booking. They can also see whether the client has paid for the booking.

Clicking a room hyperlink on the calendar does not give any result so they cannot see prices of rooms etc.

Ideal for: Site staff / the facilities management team / school staff who want to check availability

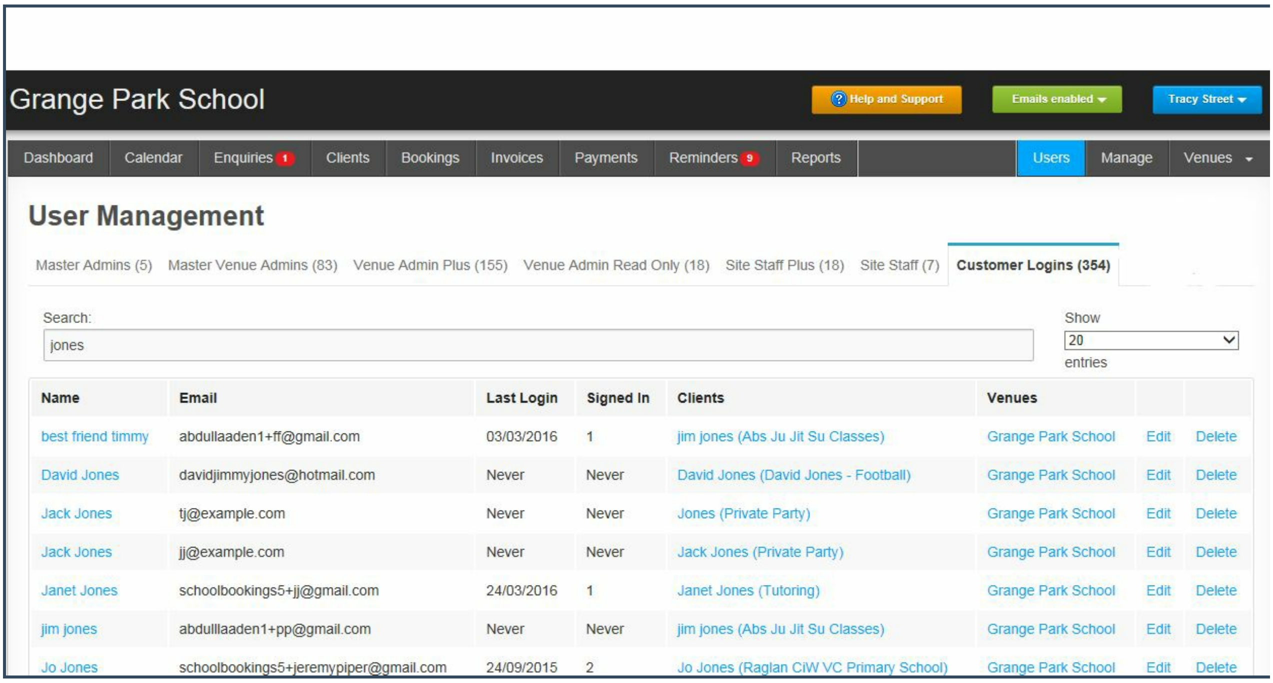
Example: login to admin.schoolbookings.co.uk with the email sitestaff@example.com and password BassetCourt12

Client user ID's

Last Modified on 03/02/2021 5:48 pm GMT

From the [**Users**] tab, you can access a list of customer log-ins for your venue.

These are created once a Welcome Email has been issued, or by setting up manually from the Client page.



From here, you can see when your clients last logged onto their account., as well as all the accounts they have access to (if they hire across multiple venues).

It is also possible to manually edit their password if required (can be useful if they are having problems accessing the system). To do this, click on 'Edit' and 'update password'

Venue Management

Last Modified on 22/06/2016 7:53 pm BST

The Venue Management section is the 'back-end' of your Booking System & Website.

It can be accessed through your booking system. Simply click on the [**Manage**] tab.

Please see articles on left hand side menu.

Adding Photo's To Your Website

Last Modified on 22/08/2023 3:06 pm BST

All the photos which appear on your website can be easily updated, it's a great way of keeping your website looking fresh!

Whenever you can add a picture in BookingsPlus, it will state in that area what size the pictures need to be. Please follow these guidelines, it will ensure that your pictures are of optimum quality. If you need to crop or resize images, we suggest one of the following free options:

- Adobe Express (Free / Easiest to use, Account Required - No Ads)
- Website Planet (Free - No Account Required - No Ads)
- Imageresizer.com (Free - No Account Required)

Click on the [**Manage**] tab.

Pictures are stored in the following places:

Venue Management - Bookable Spaces

Website Marketing - Website Spaces, Website Categories

Edit Website:

- Imagery tab (will vary depending on which template is chosen)

Edit Venue:

- Billing tab (Logo for invoices)

- Website tab (Banner pics, school logo & venue pic)

TIP: Always view your pictures on your website once it's updated to make sure you are happy with them!

We recommend that you do not take your website offline while you are making changes, as this will affect your Google presence.

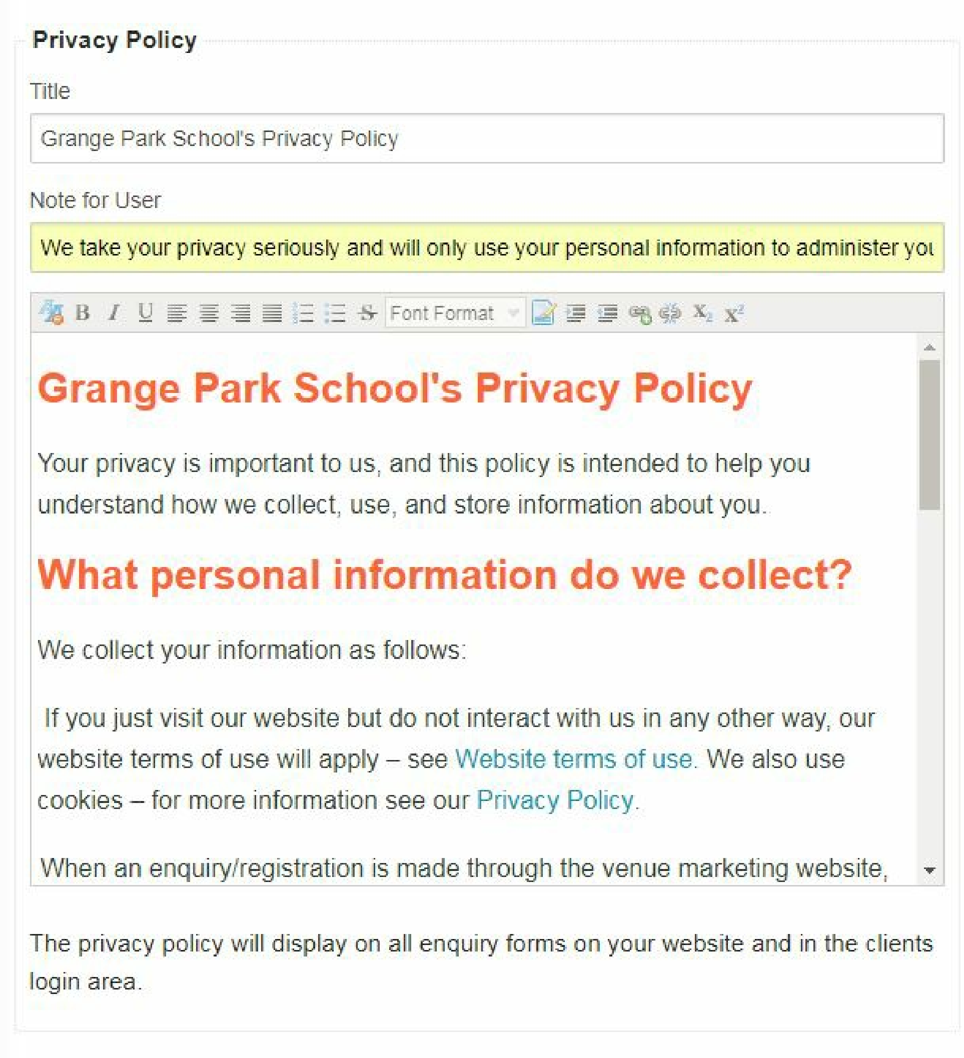
Set-up Privacy Policy and Marketing Preferences

Last Modified on 11/09/2023 11:16 am BST

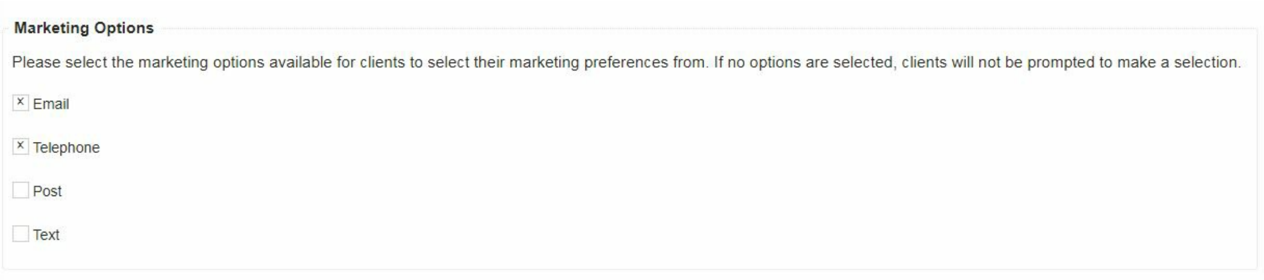
BookingsPlus allows you to present your privacy policy to both your enquirers and your clients, and also enables you to capture their marketing preferences. This can be set up as follows:

From the Manage tab, choose Edit Venue and the Client Login tab. Fill in the Privacy Policy form with a title, a note for the user (this will display above the 'I agree to the Privacy Policy' on your marketing website only), and complete the main body with your privacy policy detail.

Note that there is a character restriction of 255 on the 'Note for user'.



If you would like to also include the option for your enquirers and clients to opt in to marketing and to communicate their preferred methods, then tick which options you would like to give them a choice from:



Next, choose  in the top right. When you click save, this will add your privacy policy and marketing options to each enquiry form on your website so that you can be sure that each enquirer has read your privacy policy and indicated their preferred method for marketing. The privacy policy and marketing options will then be presented on the dashboard of your client's account. Your clients also have the ability to amend their marketing options in their account at any time.

If you wish to upload a new privacy policy or terms at any time (to websites and client accounts), just amend the text in the form and remember to hit  . If the forms are left blank, then they will not display on the websites and client accounts.

Please note that, if your venue is still set-up with uploaded PDF terms and conditions, this format will still display until you update to the new format.

To see what your clients will be presented with, please see article: Privacy Policy & Marketing Preferences on the Clients Account
To see what will be displayed on your marketing website, please see article: Privacy Policy & Marketing Options on Enquiry Forms on Websites

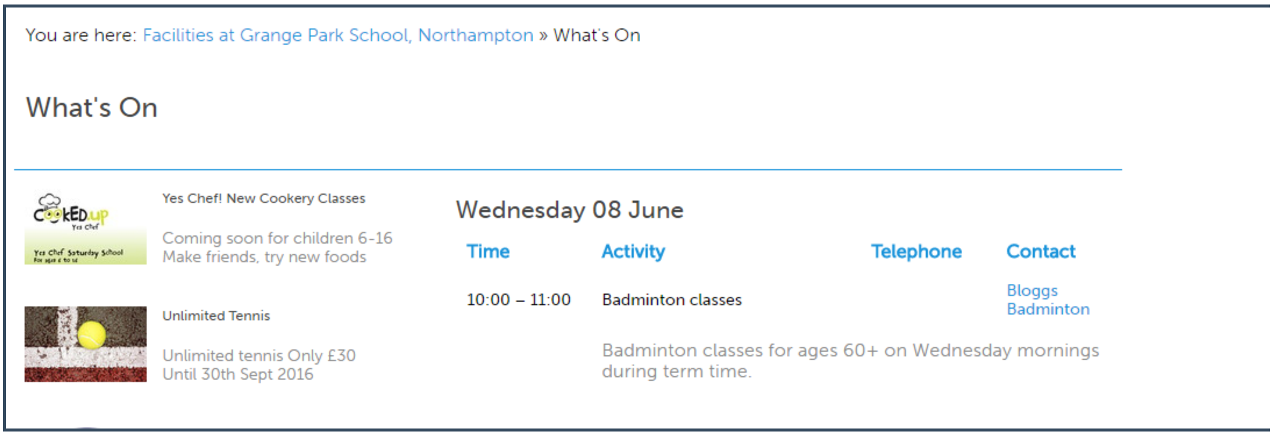
How to create an advert

Last Modified on 11/05/2022 10:40 am BST

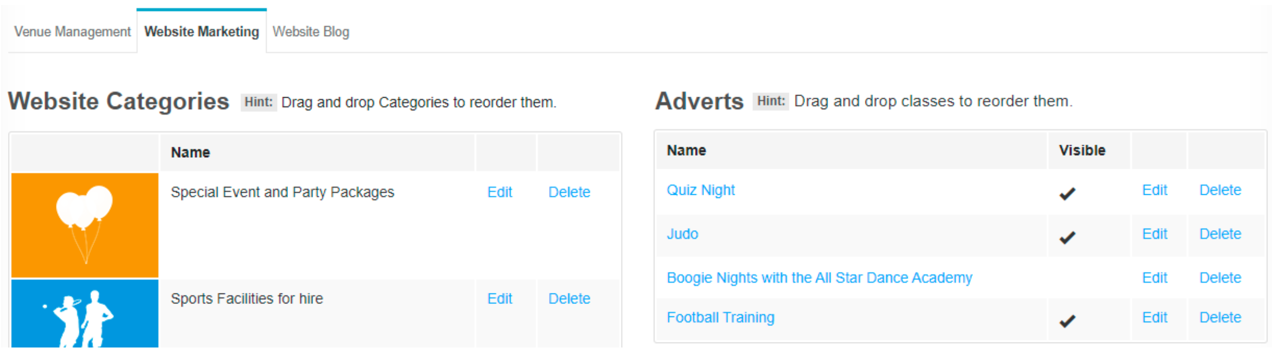
As part of your website's What's On page, you can also promote a class or bookable space using adverts. These are independent of bookings and can be a great way to showcase any one-off events, new classes or groups you are working closely with.

Screenshot of how the adverts appear on our modern website templates:

The screenshot belows shows how adverts appear on our classic template:

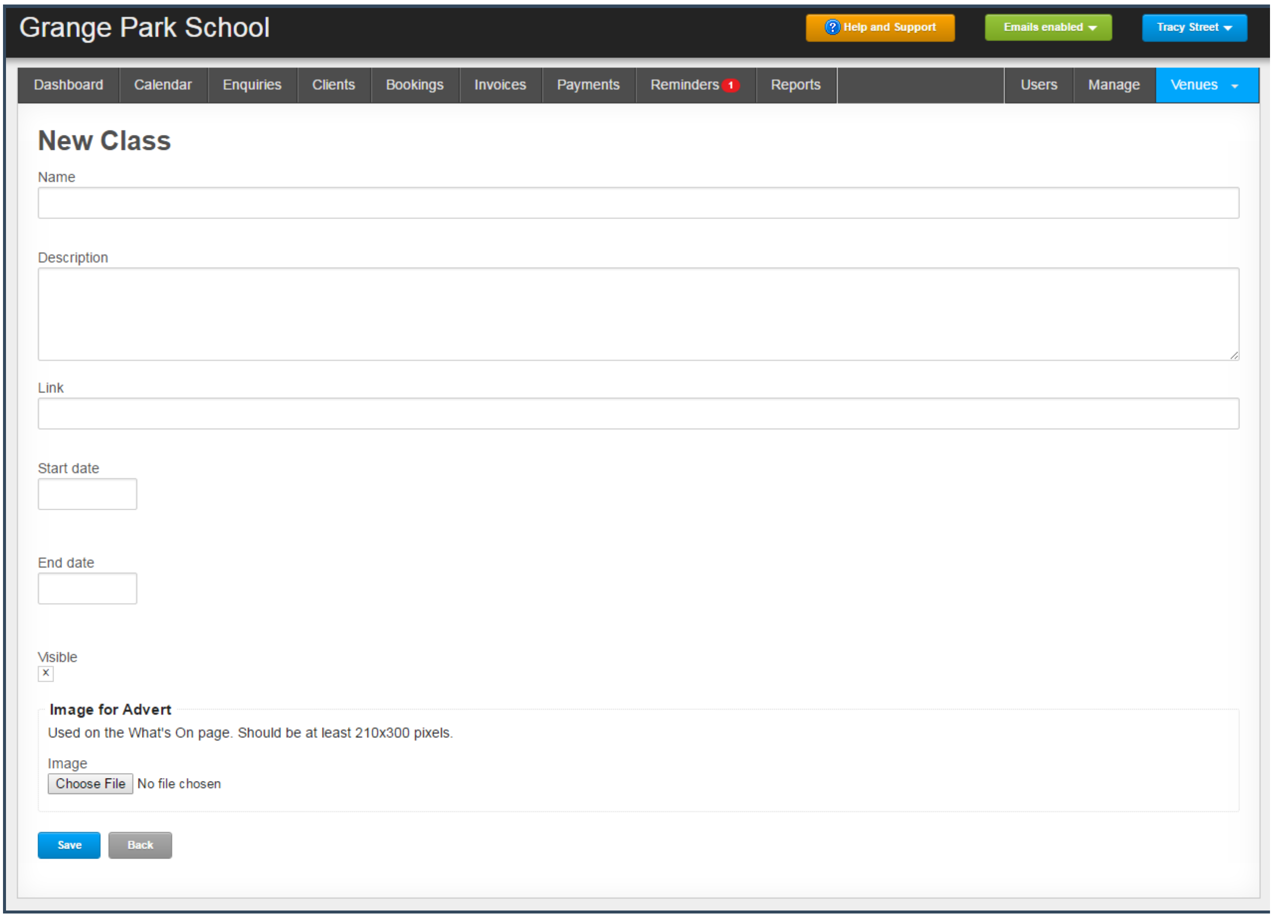


The adverts can be added through the [**Manage**] tab on the Website Marketing section. On the right hand side is the Adverts section:

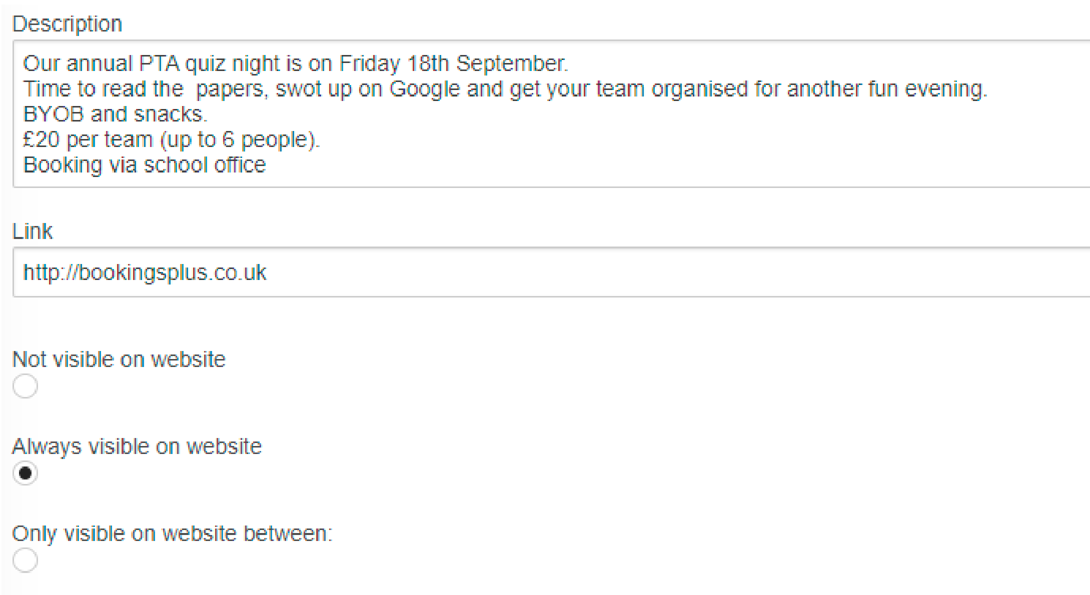


To add an advert, click 

and complete the form below. The start/end date is ideal for any one-off events or holiday clubs, this means that the advert will only be visible between these dates. If you wish it to show permanently, simply leave the dates blank.



You can see at a glance which adverts are currently 'visable' on the front end website as shown in the above screenshot. You are able to remove an advert but keep the information within the system by clicking 'Edit' and selecting from the below options e.g. 'Not visible on website' or 'Always visible on website' etc. This can be handy for any repeat, seasonal adverts e.g. Christmas Fairs or Summer Camps.



Remember to review your adverts periodically to keep your website fresh. You are also able to 'drag & drop' them to rearrange the order.

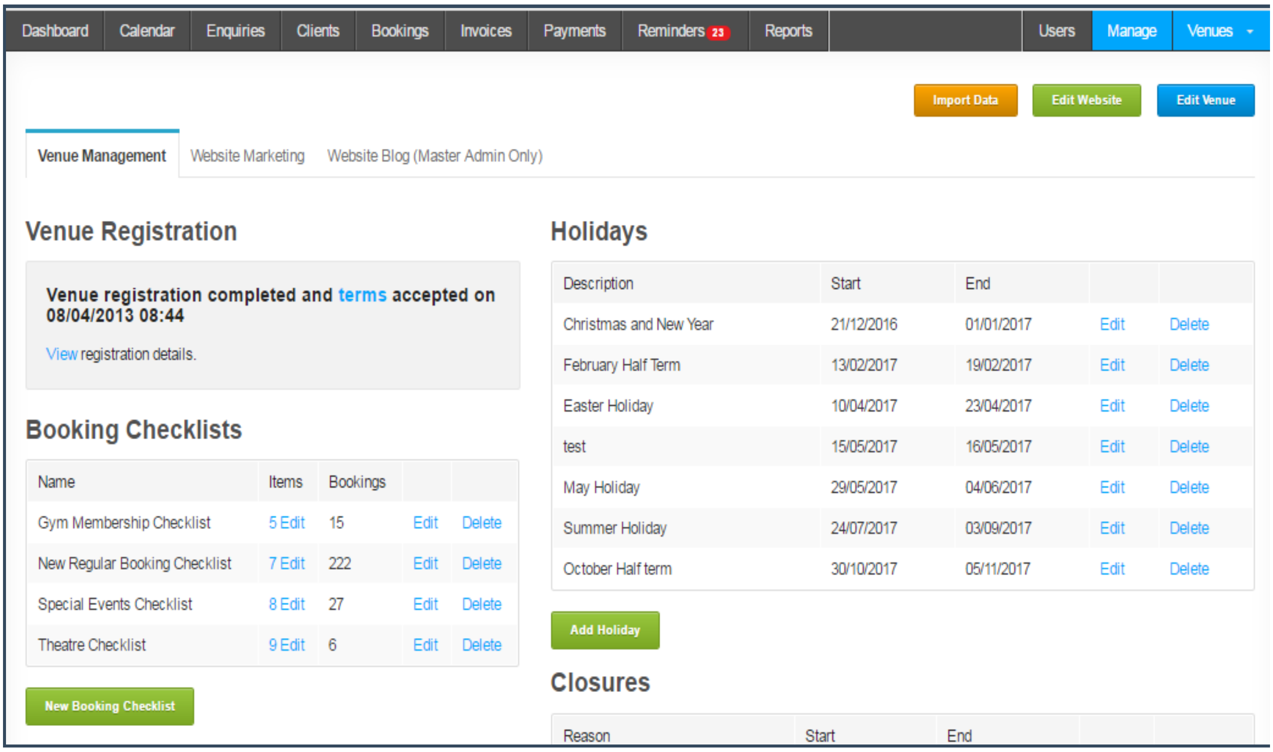
Checklists - how to set up & use

Last Modified on 03/02/2021 5:52 pm GMT

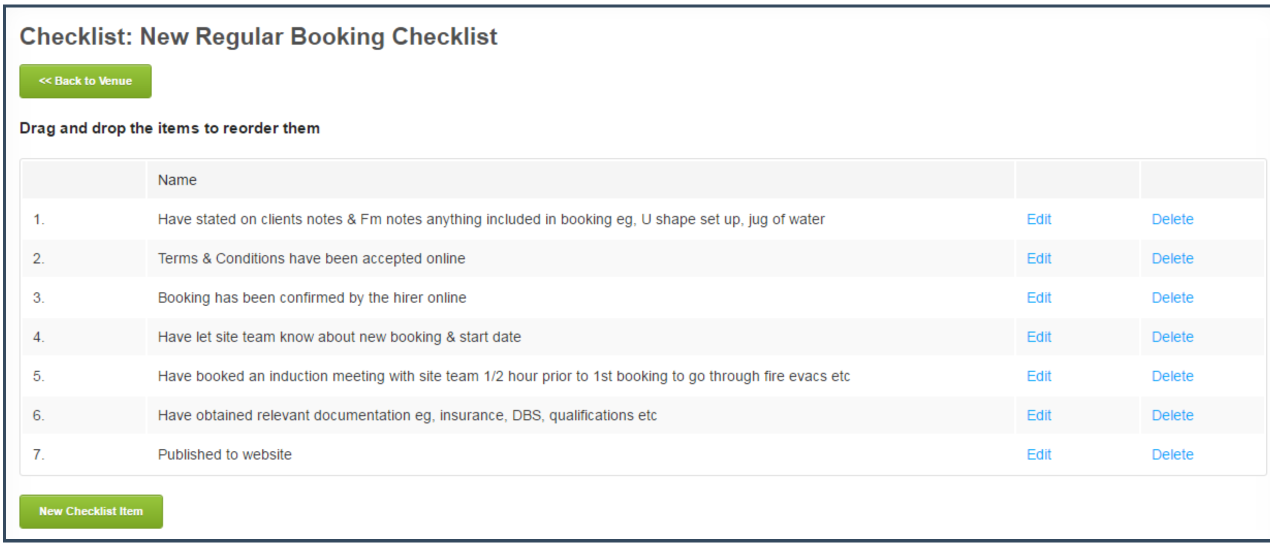
Within BookingsPlus is the option to attach a checklist to a booking. These checklists are bespoke to your venue & are designed to guide you through the steps involved when taking a new booking, ensuring that nothing is missed. Combined with the reminders, this can be a valuable tool to running your lettings effectively.

The checklists are set up within the Manage area of your website. They are then available to use when creating a booking. At the bottom of this page are 3 suggested checklists, please feel free to copy these and amend as appropriate to suit your venue. You can, of course, create your own from scratch.

To set up the checklist, click to the [**Manage**] tab.

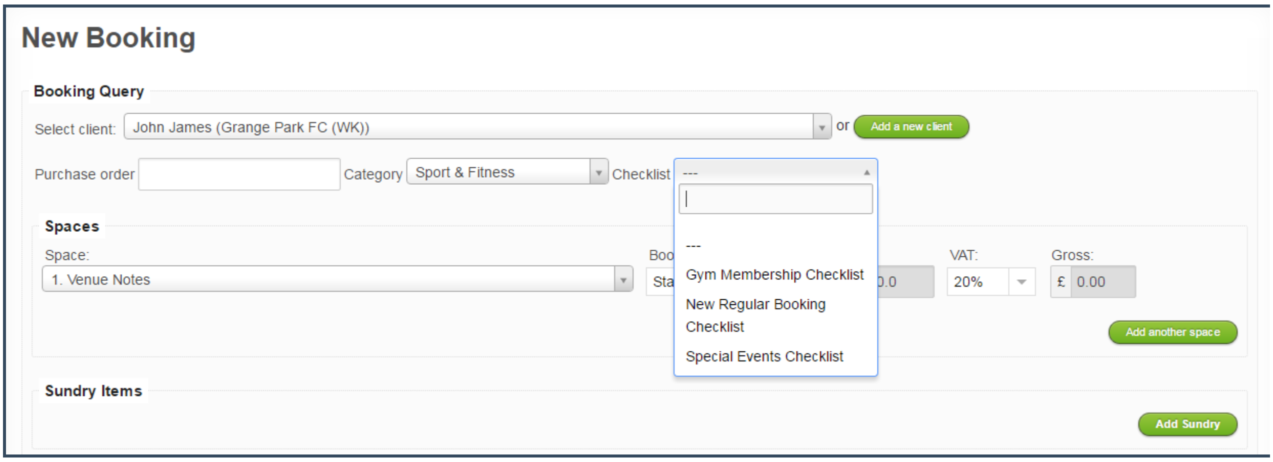


In the example above, there are 4 checklists set up in the system. These can easily be edited - simply click on the Items column to see the full checklist.

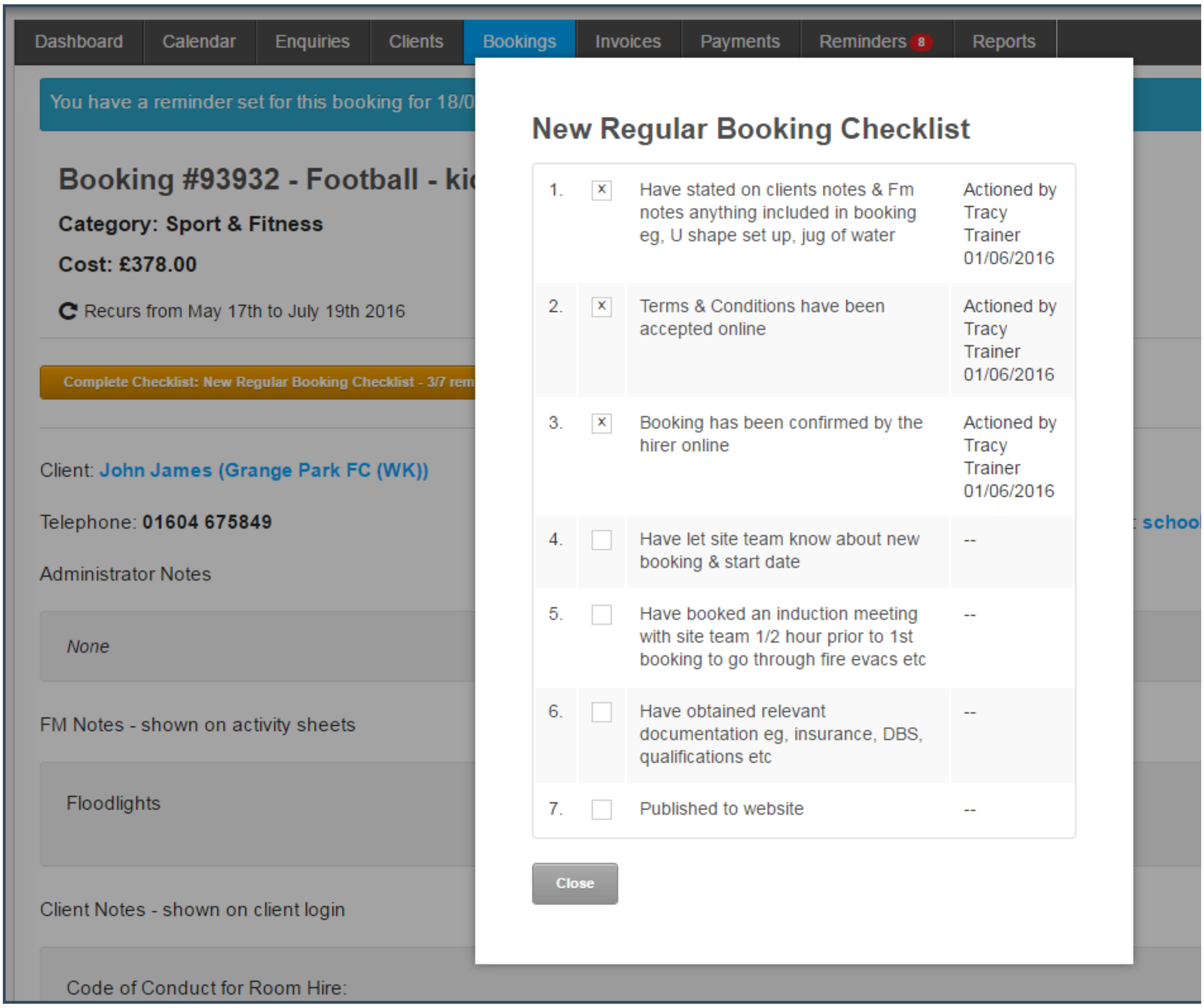


From here, simply click to Edit or Delete as needed. If you wish to add any additional steps into the checklist, click on **New Checklist Item**

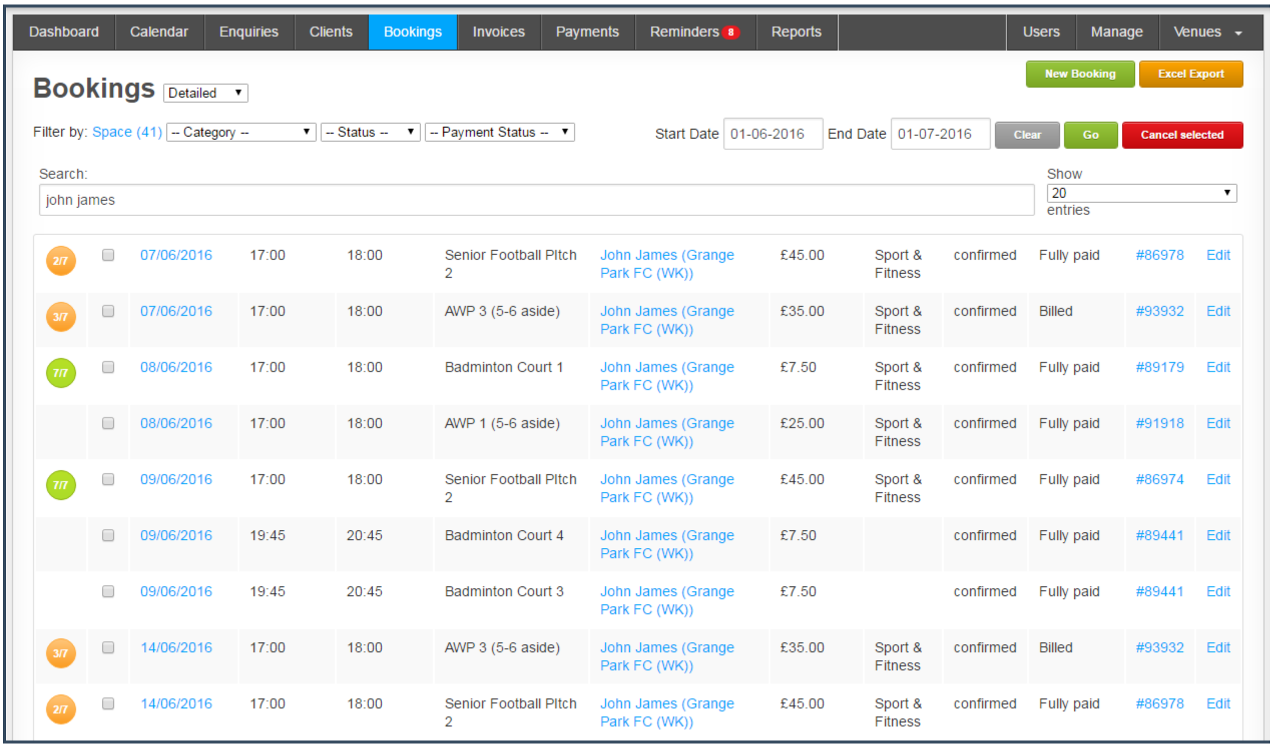
Once your checklists are all set up, they will be ready to add to any bookings you make. On the booking form, click on the drop down box to select the appropriate checklist.



Once the booking is saved, the checklist will appear in a banner across the top. By clicking on the banner, you can mark items as actioned. The colour of the banner will change from red to amber to green, as items are completed.



The status of the checklist can also be viewed from the [**Bookings**] tab which is ideal for looking at all the forthcoming bookings. From this page, click on the checklist icon to update items completed.



For examples of checklists click here Suggested checklists

Suggested checklists

Last Modified on 03/02/2021 5:54 pm GMT

Below are examples of 3 checklists which we use for our BookingsGuru service. These are based on our experience of lettings & designed to be generic to fit to most situations. Please feel free to copy these & amend to suit your working practices.

Checklist: New Regular Booking Checklist

<< Back to Venue

Drag and drop the items to reorder them

	Name		
1.	Have stated on clients notes & Fm notes anything included in booking eg, U shape set up, jug of water	Edit	Delete
2.	Terms & Conditions have been accepted online	Edit	Delete
3.	Booking has been confirmed by the hirer online	Edit	Delete
4.	Have let site team know about new booking & start date	Edit	Delete
5.	Have booked an induction meeting with site team 1/2 hour prior to 1st booking to go through fire evacs etc	Edit	Delete
6.	Have obtained relevant documentation eg, insurance, DBS, qualifications etc	Edit	Delete
7.	Published to website	Edit	Delete

New Checklist Item

Checklist: Children's Party Checklist

<< Back to Venue

Drag and drop the items to reorder them

	Name		
1.	Have stated on client & FM notes: Access to hot/cold water to be supplied, tables & chairs for xx children, any additional requirements	Edit	Delete
2.	T&C's accepted online	Edit	Delete
3.	Booking confirmed by the hirer	Edit	Delete
4.	Details of any external suppliers (eg bouncy castle, entertainer)	Edit	Delete
5.	PAT Certificates/Insurance have been obtained where relevant	Edit	Delete
6.	Let site team know numbers for party & times of collection/delivery of bouncy castles (at least 2 wks prior)	Edit	Delete
7.	Number & age of children have been confirmed (at least 1 wk prior)	Edit	Delete
8.	Payment received in full at least 5 days prior to party	Edit	Delete
9.	Send feedback form to hirer	Edit	Delete

New Checklist Item

Checklist: Special Events Checklist

<< Back to Venue

Drag and drop the items to reorder them

	Name		
1.	Official quote sent with terms attached	Edit	Delete
2.	Deposit received (50% for special events)	Edit	Delete
3.	State on client & FM notes anything included in booking, eg use of projector, banqueting tables/chairs to seat xx, etc	Edit	Delete
4.	T&C's accepted online	Edit	Delete
5.	Booking confirmed by the hirer	Edit	Delete
6.	Event planner completed & sent to site team	Edit	Delete
7.	Event planning meeting booked between site team & hirer (at least 2 months prior to event)	Edit	Delete
8.	Complete catering staff request (if kitchens required) and sent to Catering Academy	Edit	Delete
9.	Send kitchen terms to hirer (if kitchens booked)	Edit	Delete
10.	Equipment list with PAT certificates must be obtained	Edit	Delete
11.	Obtain insurance documents (for caterers as well where relevant)	Edit	Delete
12.	Raise invoice 2 months prior to event	Edit	Delete
13.	Receive full payment 1 month prior to event	Edit	Delete
14.	Phone hirer to confirm event times, numbers & final details 2 wks prior to event.	Edit	Delete
15.	Phone site team to confirm final numbers & check event is staffed	Edit	Delete
16.	Send deposit back after receiving all clear from post event checks	Edit	Delete
17.	Send feedback form to hirer	Edit	Delete

New Checklist Item

BookingsGuru is a service that we provide to schools and community facilities where we provide the admin and marketing for their lettings.
https://bookingsguru.co.uk/

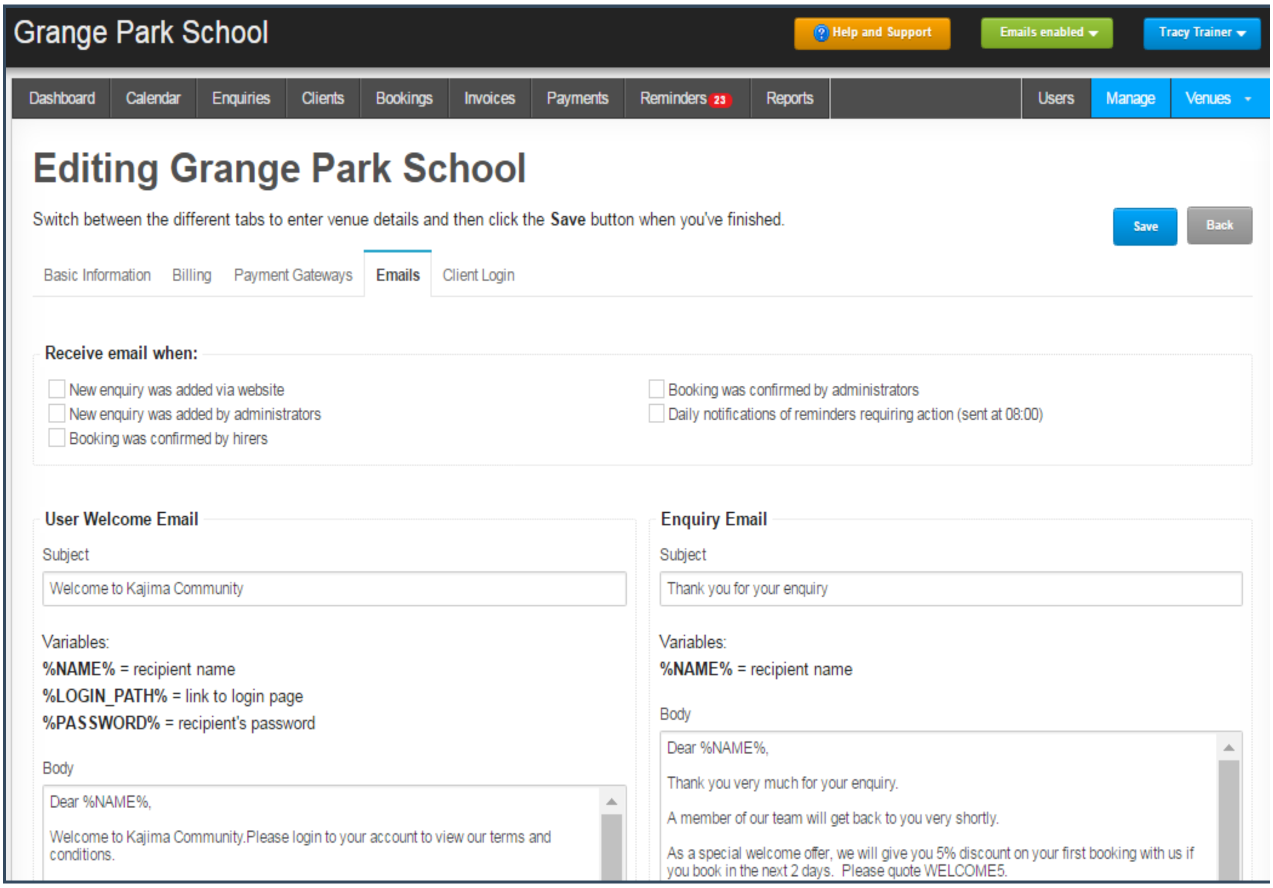
Amend automated emails

Last Modified on 03/02/2021 5:55 pm GMT

Within BookingsPlus is a bank of generic emails which are sent to your clients at various stages throughout the booking process.

You have full control over the content of the emails & we suggest that you review them periodically to ensure they are worded in accordance with your lettings procedures.

The emails are located within the [**Manage**] section of your system. Click on **Edit Venue** and select the [Emails] tab.



Each email can be fully customised to your needs. Simply read through the content & type in your amendments. At certain points, you will notice code such as %NAME% or %PASSWORD%. This is where client specific information is pulled from BookingsPlus into the email, so ensure you don't amend any of these sections. Otherwise, change what you need!

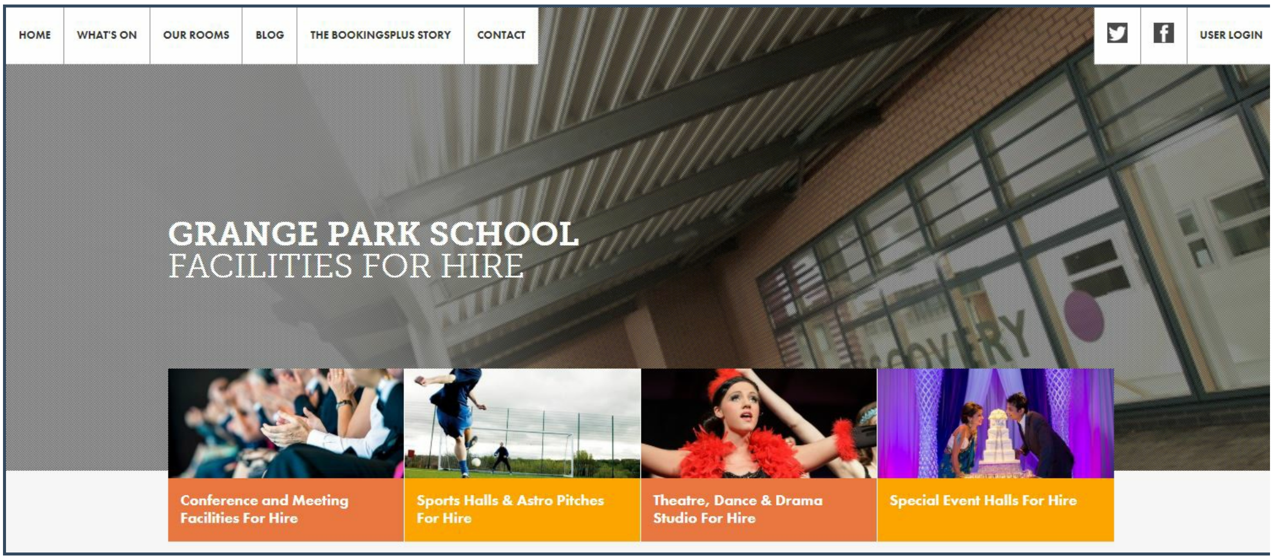
Once you've finished, just click **Save** .

Populating Website Categories

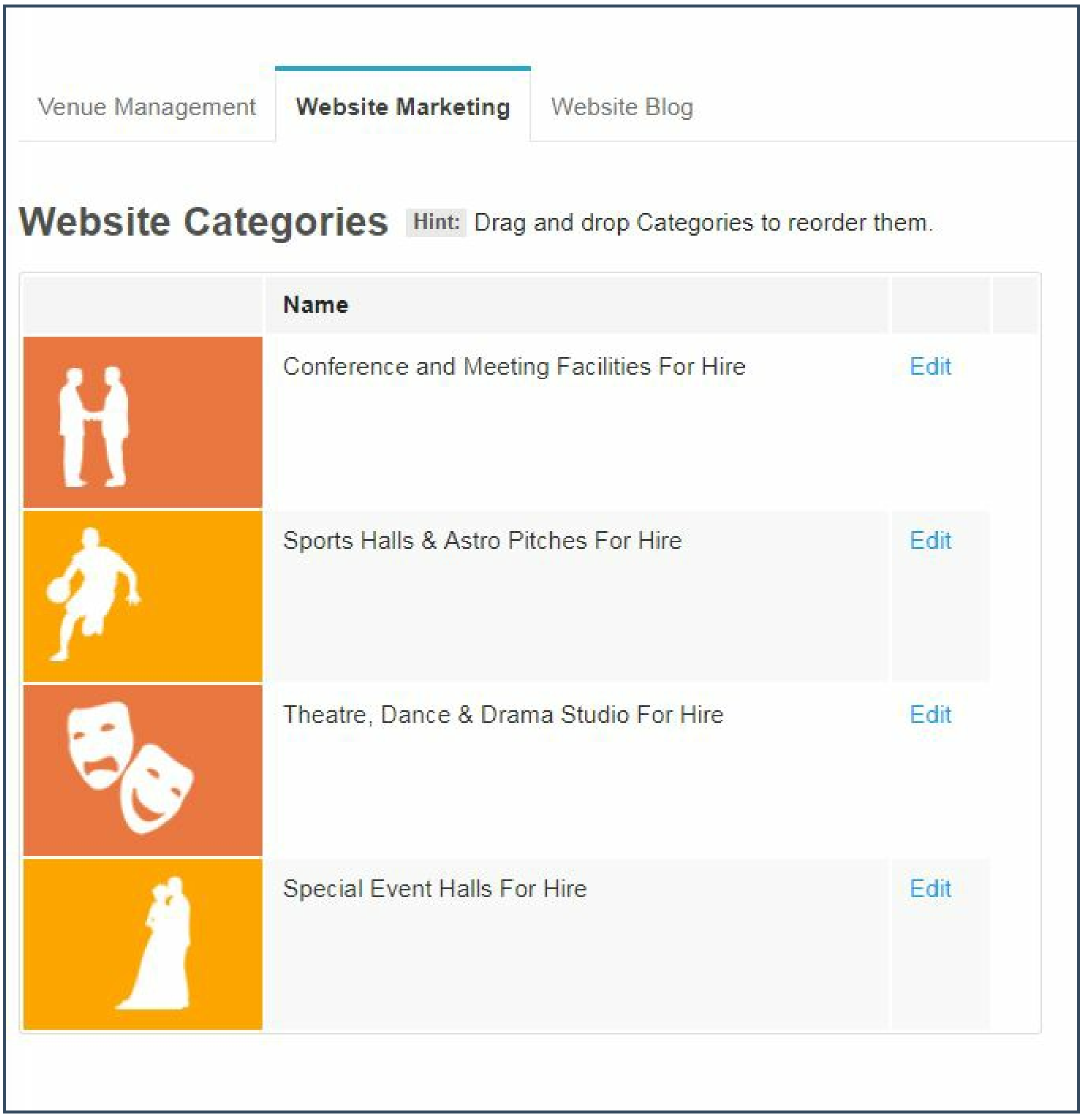
Last Modified on 03/02/2021 5:56 pm GMT

Your BookingsPlus website is fully customisable to ensure it shows off your facilities to their best advantage.

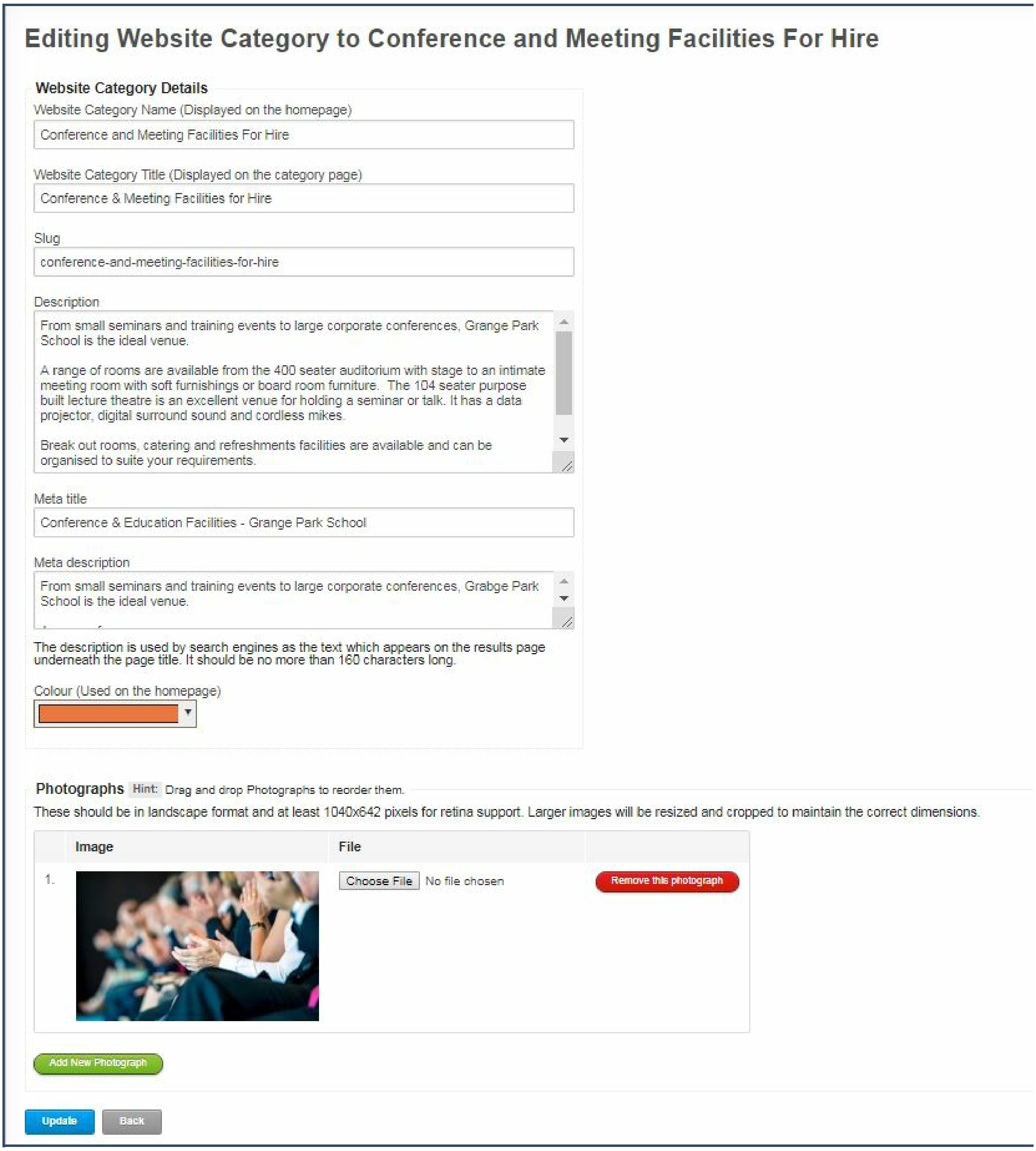
The website categories on your homepage can be customised to ensure they are relevant to your venue and the spaces you have available to view on your website.



Click on the Manage tab > Website Marketing tab and you will see the below...



From here you then have the option to edit your website categories as required, including personalising the text, images and colour. Website spaces (rooms available at your venue) can then be selected to appear within these categories to help people visiting your website to find what they are looking for.



Editing Website Category to Conference and Meeting Facilities For Hire

Website Category Details

Website Category Name (Displayed on the homepage)

Conference and Meeting Facilities For Hire

Website Category Title (Displayed on the category page)

Conference & Meeting Facilities for Hire

Slug

conference-and-meeting-facilities-for-hire

Description

From small seminars and training events to large corporate conferences, Grange Park School is the ideal venue.

A range of rooms are available from the 400 seater auditorium with stage to an intimate meeting room with soft furnishings or board room furniture. The 104 seater purpose built lecture theatre is an excellent venue for holding a seminar or talk. It has a data projector, digital surround sound and cordless mikes.

Break out rooms, catering and refreshments facilities are available and can be organised to suite your requirements.

Meta title

Conference & Education Facilities - Grange Park School

Meta description

From small seminars and training events to large corporate conferences, Grabge Park School is the ideal venue.

The description is used by search engines as the text which appears on the results page underneath the page title. It should be no more than 160 characters long.

Colour (Used on the homepage)

Photographs Hint: Drag and drop Photographs to reorder them.

These should be in landscape format and at least 1040x642 pixels for retina support. Larger images will be resized and cropped to maintain the correct dimensions.

	Image	File	
1.		Choose File No file chosen	Remove this photograph

Add New Photograph

Update Back

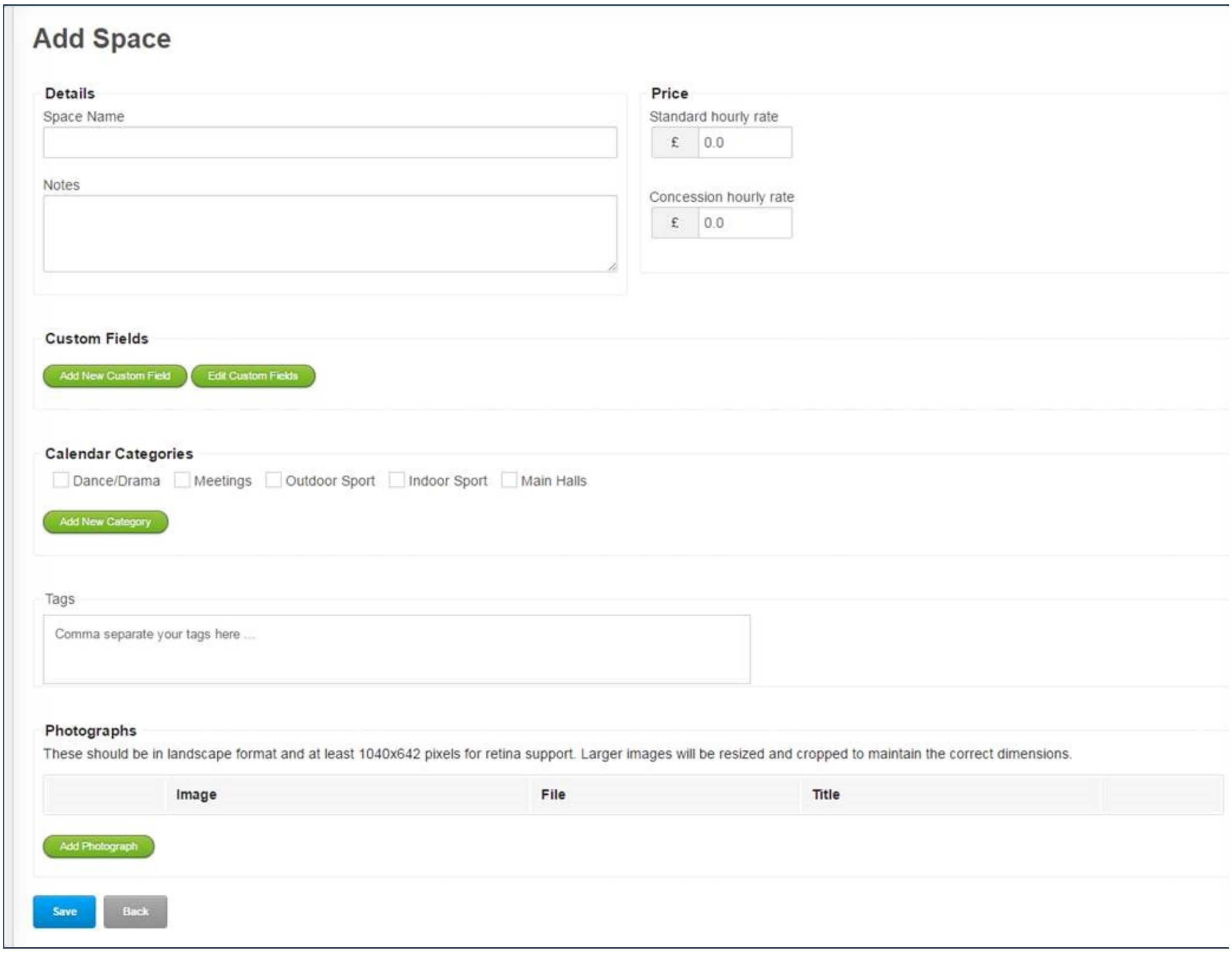
TIP: We recommend visiting your website once any changes have been made to ensure you are happy with these.

Add a new space to bookings system

Last Modified on 03/02/2021 6:05 pm GMT

There's no limit within BookingsPlus to the number of bookable spaces you can have. If you need to add any additional spaces once you are up and running, simply follow this process:

Click on the **[Manage]** tab, this will take you to the sub tab **[Venue Management]** and scroll down to the heading Bookable Spaces, click on 



From here you can add the Space Name of what would like the space to be called.

In the Notes section, add a description of the space, what it is suitable for, any equipment available and any restrictions.

You can then add in the Standard and Concessionary Price, tick which Calendar Category is most suitable, add any Tags, photographs and click Save.

If none of the calendar categories are suitable, additional categories can also be added from Venue Management tab under the heading Calendar Categories and click New Category.

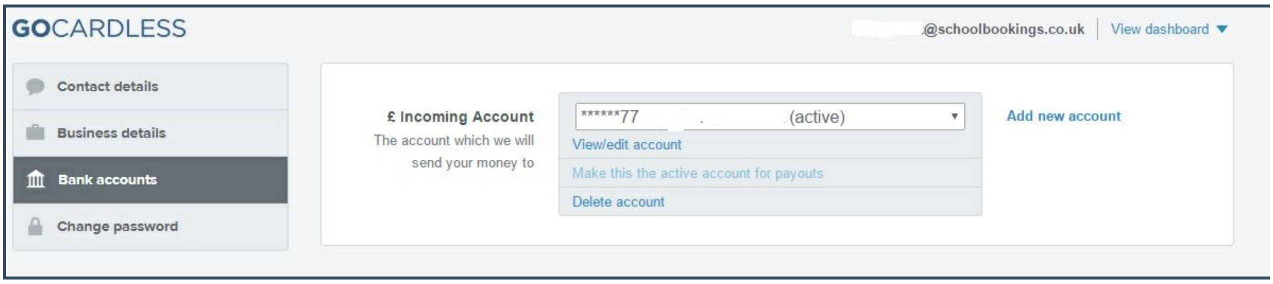
Click here for further details about tags how to add one and what they do

TIP: We recommend to check once a new space has been created to make sure it's looking just as you intended. This is best done by clicking on the space name in the calendar.

Update your bank account details for GoCardless

Last Modified on 03/02/2021 6:07 pm GMT

If your school bank account details change, you will need to amend your GoCardless account to ensure that the funds continue to be transferred into your account. These details are not stored within BookingsPlus, so to do this log onto GoCardless using your details. Once done, click on  select 'Settings' and then 'Bank accounts' from the left hand menu. From the options on screen, you will be able to add your new bank account details. Please bear in mind that once done, this will be subject to a verification process by GoCardless, so there may be a temporary hold put on payouts into your school bank account.



Update your school logo

Last Modified on 03/02/2021 6:10 pm GMT

If your venue has changed its logo, don't forget to update BookingsPlus!

Your logo is stored in 2 places within the system - on invoices and also on your website. They are both accessed by clicking on the **[Manage]** tab.

Invoices: Click Edit Venue select the [Billing] tab, scroll down to the bottom left & replace the logo with your new version (note size guidelines). Once done, click Save at top right. Please note that if you do update your logo, this will be updated across historic invoices.

Website with a Classic Template: From the Manage tab click Edit Website select the [Imagery] tab & scroll down to section for 'Homepage Logo' to replace the logo with your new version (note size guidelines) & click Save in top right.

Websites with Vancouver and Calgary Templates: From the Manage tab click Edit Website select the [General] tab & scroll down to section for 'Logo' to replace the logo with your new version (note size guidelines) & click Save in top right.

TIP: Always check the website once you are finished to make sure you are happy with the end result!

Adding venue documents

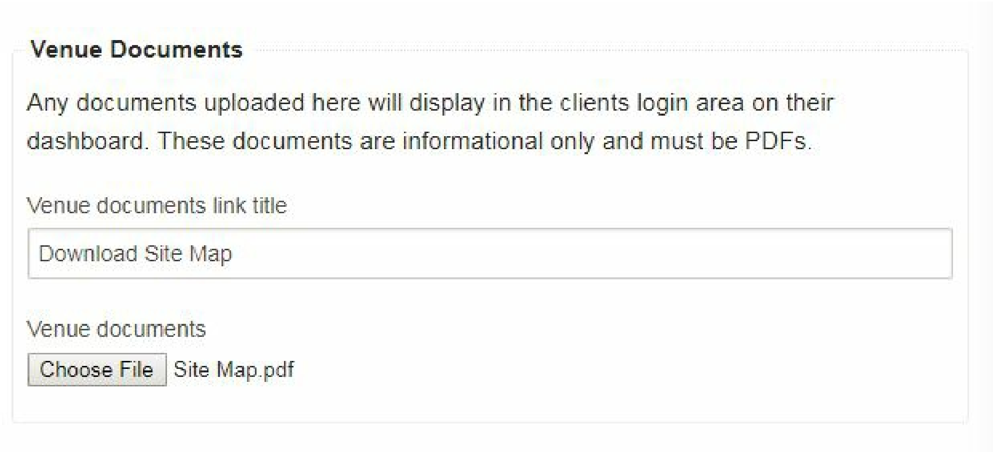
Last Modified on 03/02/2021 6:11 pm GMT

You can add a PDF document to your clients online account, visible as a download link on their dashboard.

This can be useful where you would like to communicate additional information to your clients that do not form part of your terms and conditions. Or if you would like to include the document as a link from your terms and conditions, you can do this too, as the PDF, will have its own unique URL. Fire evacuation procedures, site maps etc might all be good to be uploaded separately for your clients to view if required.

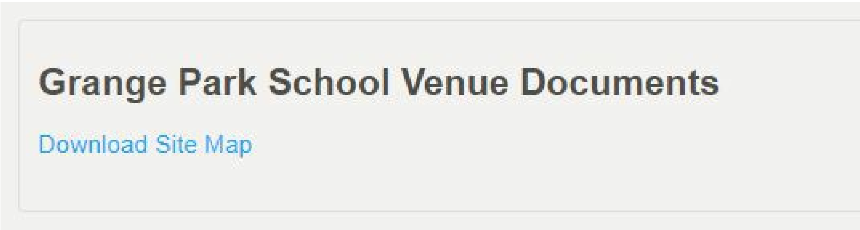
To set this up, click on the Manage tab > 

Client login tab. Scroll down to the Venue documents section, and enter the text for the hyperlink that the client will be able to click on to download the document. Click to choose the file that you want to display in the clients account. Please note that this needs to be a PDF file and we recommend no more than 2mb in size to keep download speeds optimum.



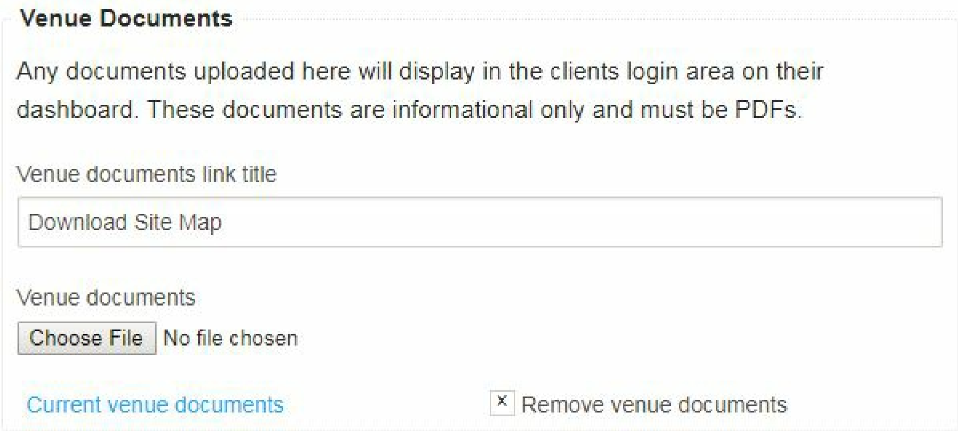
Scroll up to the top of the page and click 

the document will now display on the dashboard of your clients accounts, as below:



If you need to remove or edit the document, you are able to do so in the Manage tab > 

Client login tab. Simply upload a new file, or click to remove, and choose save.

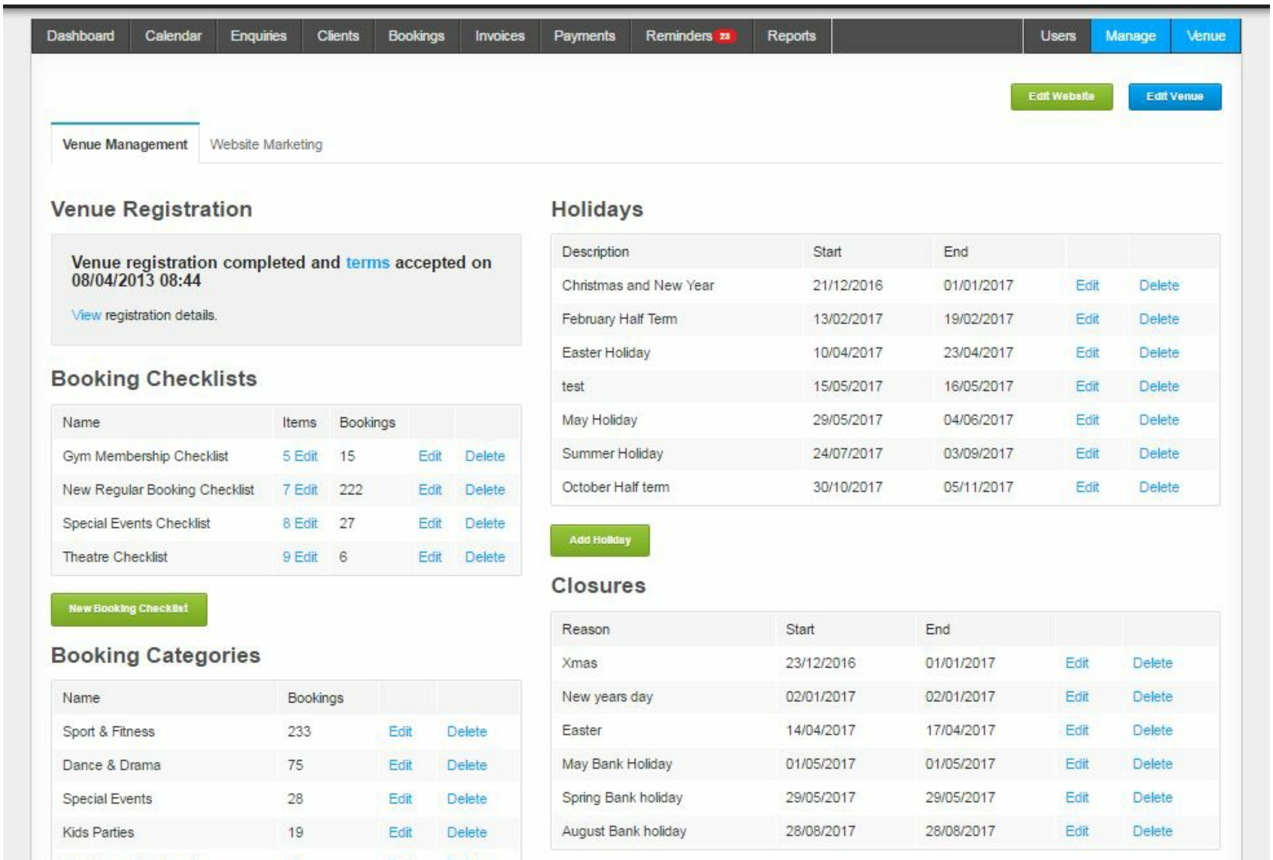

Venue Documents
Any documents uploaded here will display in the clients login area on their dashboard. These documents are informational only and must be PDFs.
Venue documents link title
Download Site Map
Venue documents
Choose File
No file chosen
Current venue documents
Remove venue documents

Holidays & closures

Last Modified on 03/02/2021 6:12 pm GMT

Holidays & Closures can be easily added to BookingsPlus. Any school holidays added allow you to add 'term time only' bookings. Closures will ensure that no bookings are inadvertently added on those days.

Both these sections are accessed via the [**Manage**] tab.



Simply click on 

or 

and insert the dates required.

Add Room tags to use the 'Check Availability Across Venues' function

Last Modified on 03/02/2021 6:13 pm GMT

Within BookingsPlus, we have a function where you can check availability at other venues under your control. This is ideal for multi-site schools, academy or health centre clusters, local authorities or centrally managed schools.

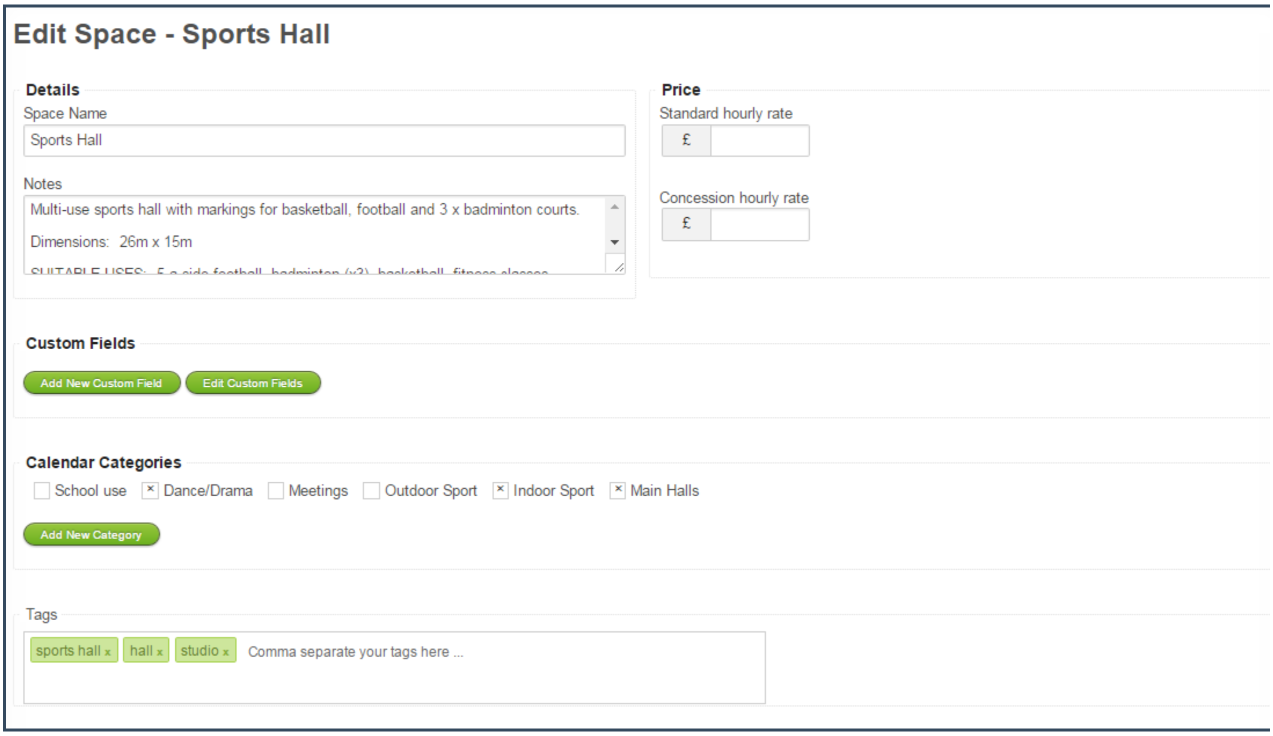
To make this work, BookingsPlus uses a tagging system, so it can understand the potential uses of a space. We will have set this up initially for you, but if you add any additional spaces it helps to understand how it works.

The standard tags we use the system are:

TAG NAME	Use for the following spaces:
Astro	Astroturf pitches / AWP
Pitch	Grass pitches for rugby or football
Hall	Any sports hall, events hall, gymnasium
Studio	Use for dance studio's / drama studios
Std Class	Standard Classrooms
Spl Class	Specialist classrooms eg, cookery, tech, ICT
muga	Outdoor Tennis / Netball Courts / MUGA Area
Meeting	Meeting rooms

You are welcome to add your own tags for your venues if you wish. Just make sure it's exactly the same format throughout.

To add the tags, click to edit a bookable space. Under the 'tags' header, simply type in the relevant tag above. Press 'Enter' once done & the tag will appear.



For more information on how to use the check availability function see Check availability across venues

Update your T&C's

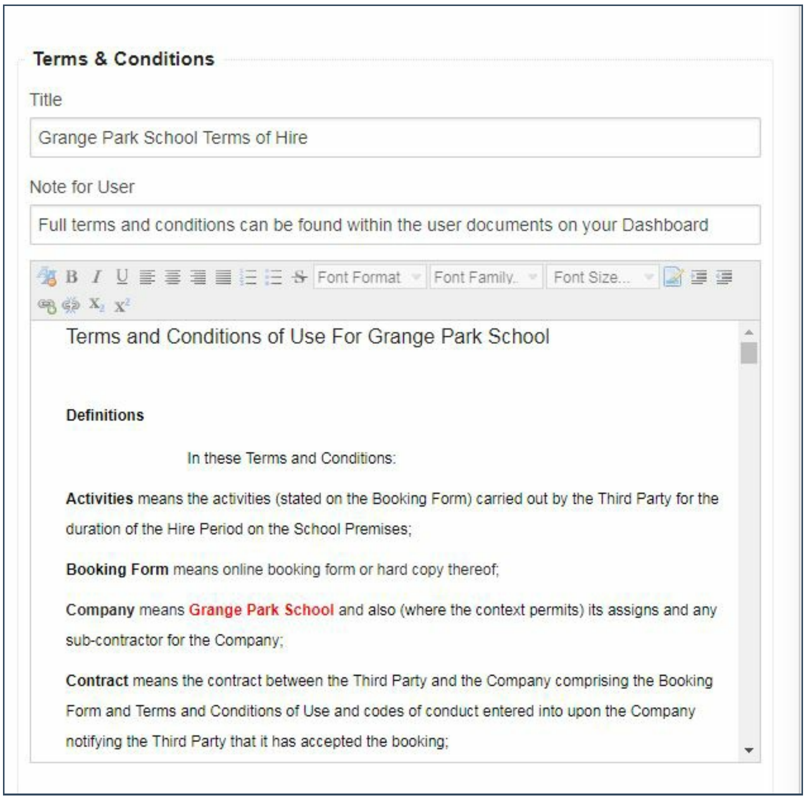
Last Modified on 03/02/2021 6:13 pm GMT

It's good practice to update your Terms & Conditions at least every 12 months. Once this is done, it's quick & easy to to revise it and have your hirers re-accept.

Select the [**Manage**] tab and select **Edit Venue** . From here, click on [**Client Login**]. On the right hand side is a section for **Terms & Conditions.**

You can amend the body of the Terms and Conditions by using the scroll function on the right hand side to find the relevant text. Once you are happy with your amendments it may be worth typing at the bottom of the page when these were last updated. Please also ensure that all three text boxes (Title, Note for User and the body of text) remain populated in order to correctly display.

Then click Save at the top of the page.



The Terms and Conditions above will display in the clients login area.

Please remember that **any** amendments to the form above will mean all clients are required to re-accept the new terms.

It is easy to see on the client account whether they have accepted the latest version.

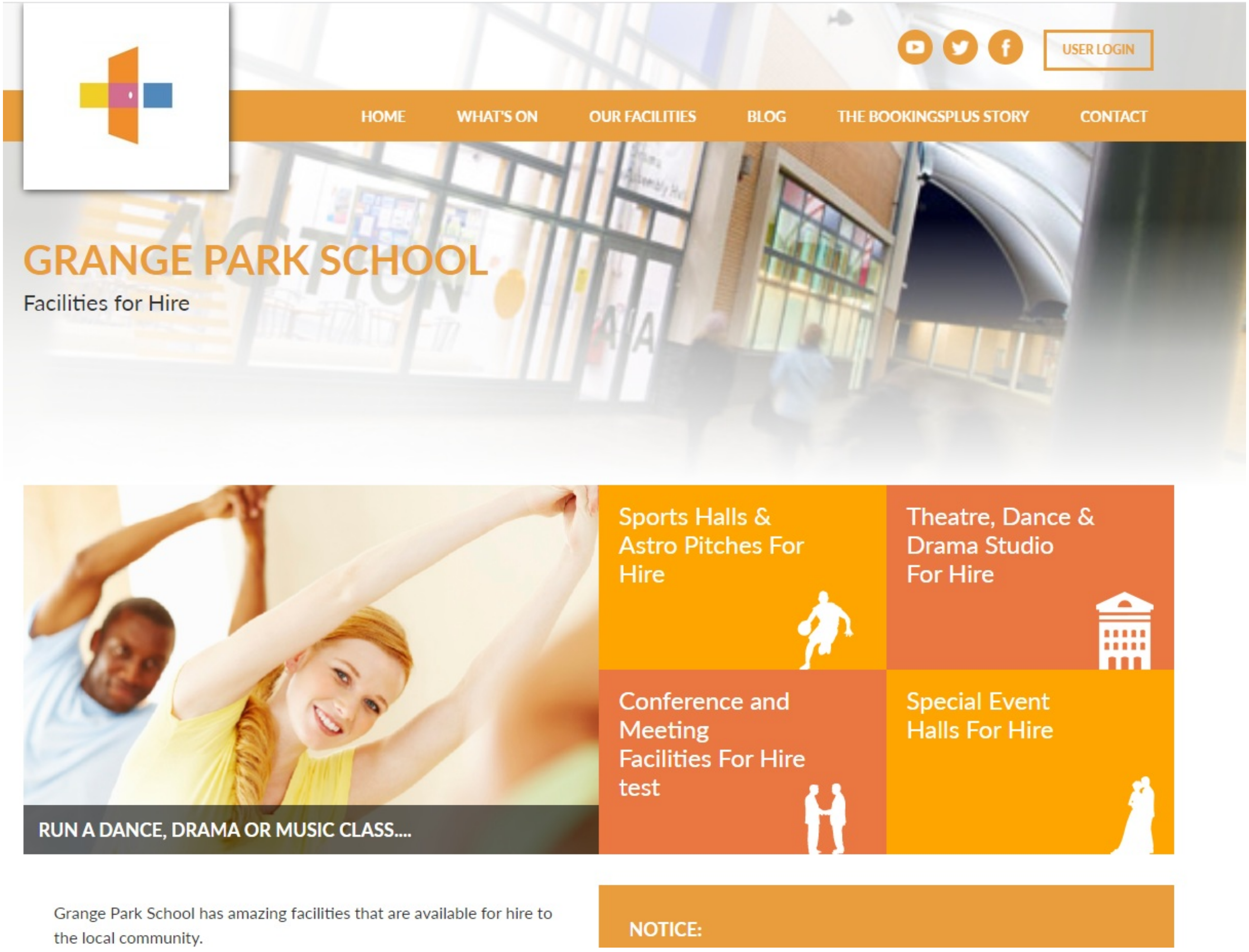
Watch our video tutorial:

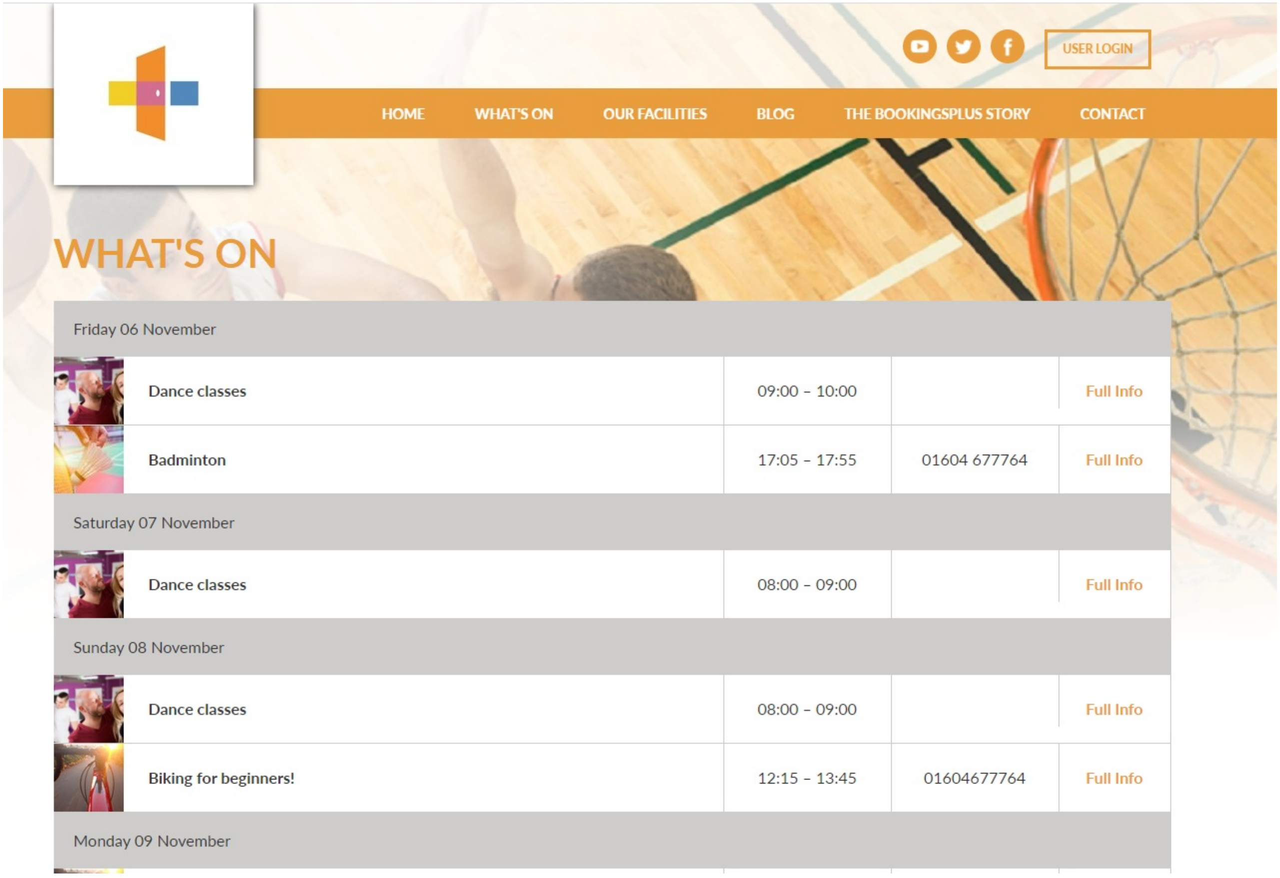
Publish an event on What's On page

Last Modified on 21/04/2021 1:37 pm BST

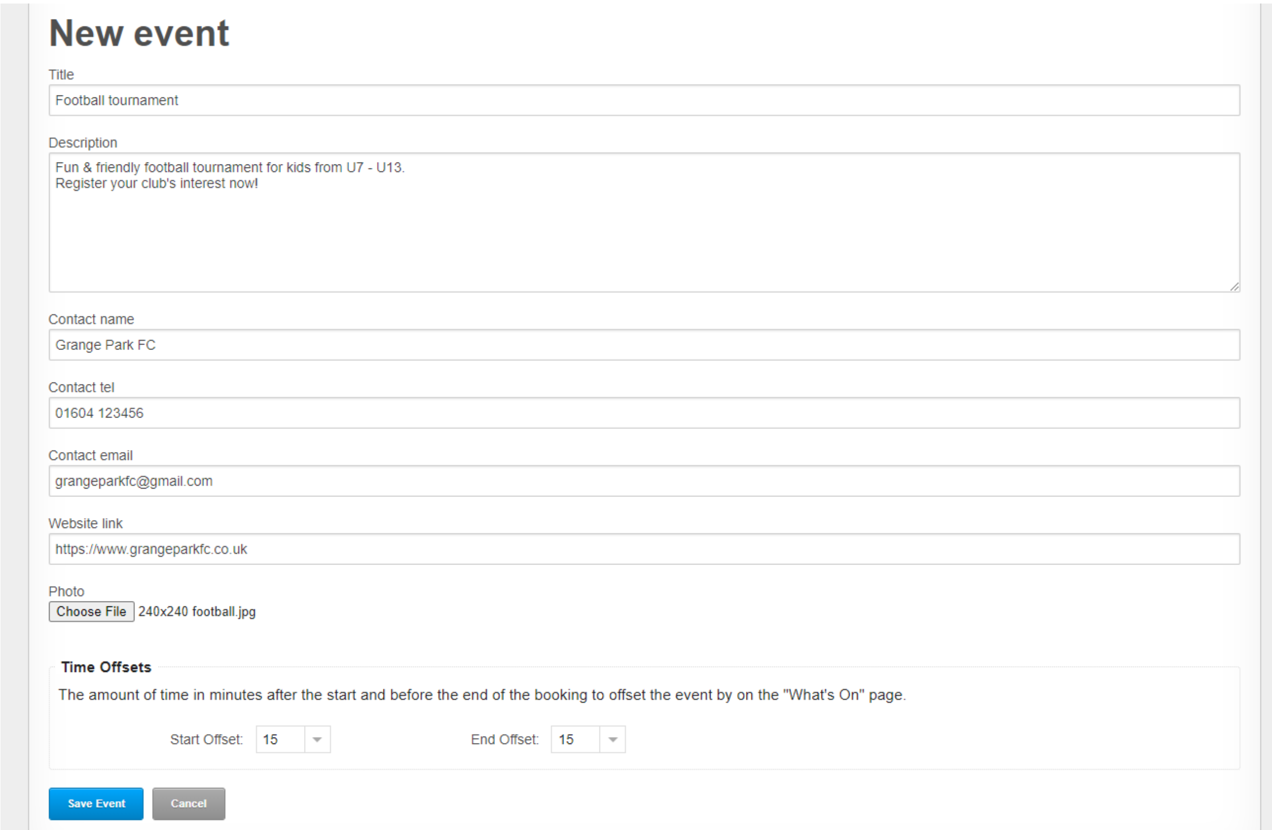
Your website is an integral part of the BookingsPlus system - it's a great way to showcase your facilities as well as the activities which are happening in your venue. This offers a marketing opportunity to your hirer's, ensuring their classes remain popular. It's also useful for the local community to see what is on offer at your venue & contact the hirer directly to find out more information.

It's easy to publish classes to your What's On page and once you've published it, any changes and cancellations made to the initial booking will be shown on the What's On page, so no updates required. (Please note - if you choose to renew the booking, you will need to repeat these steps to publish the class). The screen shots below are from our Calgary Template. With our Vancouver and Calgary templates, you have the additional option to hide the What's On page.





Firstly, select the booking you wish to publish. Scroll down to the bottom of the booking form & click 



Fill in the form. Please ensure you have permission to display clients phone numbers/emails (if the client has a website, then take the details from there as these are already publicised or even use a link to your clients Facebook page).

The start offset & end offset are there in case the class times are different to the actual booking times. This can happen when set-up time is included in a booking. For example, a cricket net booking may be from 9:00 - 10:30, however the first and last 15 mins are for setting up/packing away of the cricket nets. Using the offset means that the event will appear on the What's On page from 9.15-10.15am which is the time the session is open to the public.

Once completed, click to 

The booking will now appear on the What's On page. Any subsequent amendments to the booking eg times, cancelled dates etc will automatically update.

Watch our video tutorial:

Booking categories

Last Modified on 03/02/2021 6:19 pm GMT

Booking categories help to decipher and classify different types of bookings They are also very useful to analyse bookings for tax purposes, such as to understand how much bookings value is associated with bookings that are not classed as ‘primary purpose’.

To create a new or edit an existing booking category go to the Manage tab in the top right hand side of your screen and scroll down to the Booking Categories.

The below is an example of different types of booking categories you could have. Also consider whether having categories called 'New Bookings' or 'Regular bookings' may help to identify conversion of enquiries.

Booking Categories

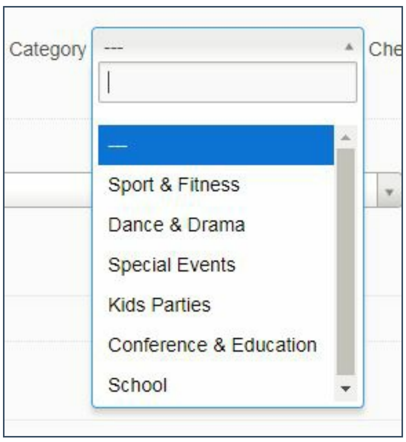
Name	Bookings		
Sport & Fitness	281	Edit	Delete
Dance & Drama	90	Edit	Delete
Special Events	40	Edit	Delete
Kids Parties	23	Edit	Delete
Conference & Education	63	Edit	Delete
School	27	Edit	Delete

New Booking Category

To edit an existing Category name click Edit, change the name and click Save

To Create a New Booking Category click New Booking Category type the name and click Save . It's that simple!

Then when creating a booking, you can select a category from the Category drop down at the top of the Booking Form:



You will then be able to filter by these on the Bookings Value, Bookings Information and Cancelled Bookings Reports, as well as at the top of the Bookings Tab:

If you have any questions about Bookings Categories, or would like any further information please don't hesitate to get in touch with our helpdesk on helpdesk@bookingsplus.co.uk or give us a ring on 01604 677764

A guide on website blogging

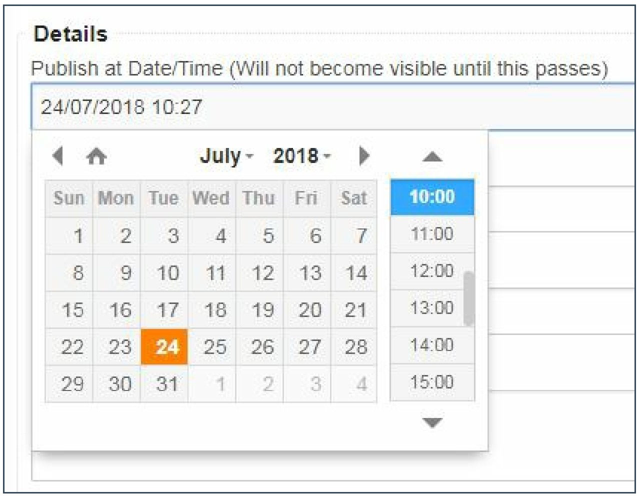
Last Modified on 03/02/2021 6:20 pm GMT

We have developed a feature for our Vancouver & Calgary website templates to add a Blog on your website. This will enable you to have fresh new content on your website and help the search engines know that your website is current and kept up-to-date!

To enable Blogs on your website, your website must be using either Vancouver or Calgary website templates. For further information on this take a look at our article: Switching to a new website template

To create your first blog, go to the Manage tab, click on the Website Blog sub tab and click New Blog Post.

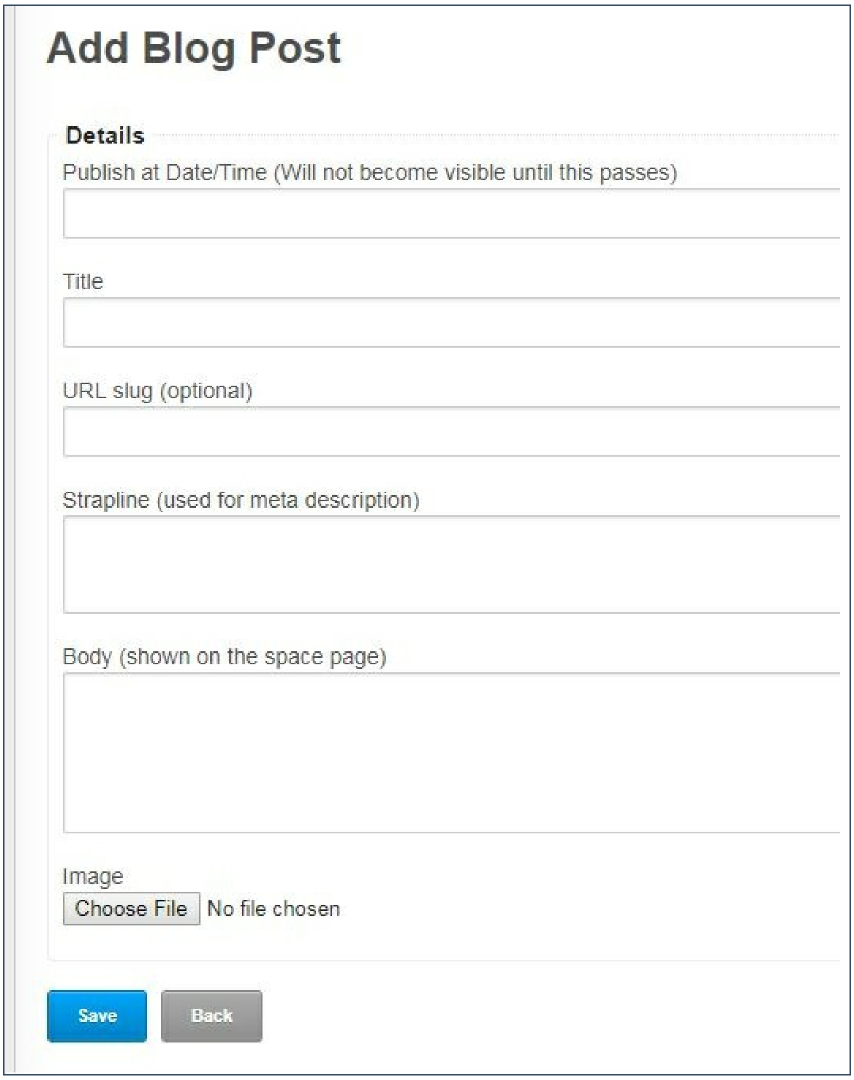
Firstly, you are given the option to be able to set when you would like your Blog to be visible/published on the Website.



Then fill out the Title of the article. Leave the URL blank, as this will populate based on the name of the article, and then you can edit this later if needed.

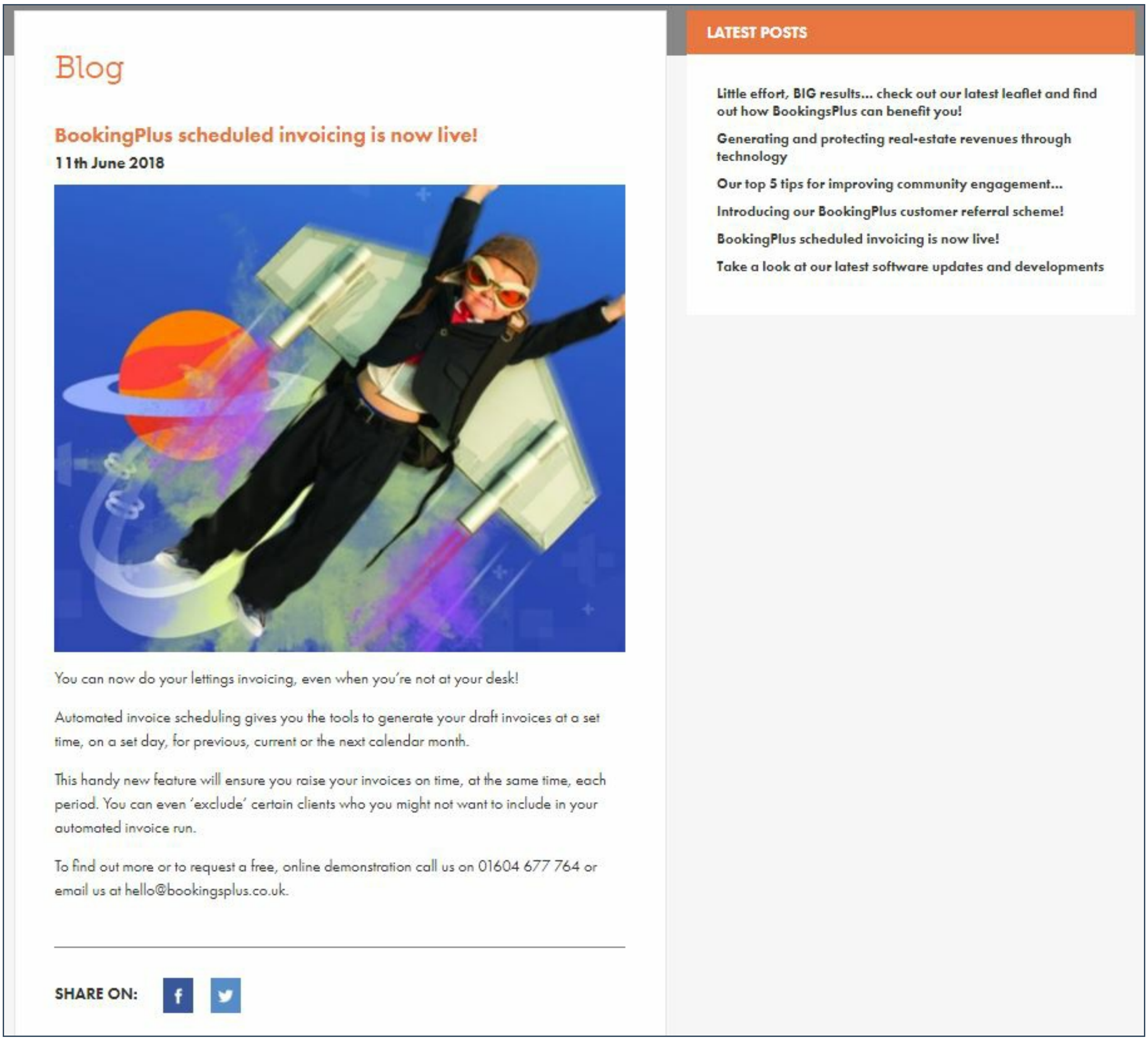
The Strapline is the key words a search engine will look at when typed by members of the public to match and bring them to your article. Therefore it is very important that these are filled out, but kept relatively simple. For example, for an article about New Tennis courts at our Demo Venue you could say 'New Tennis Courts for hire at Grange Park Demo Venue, Northampton, NN4'.

The body is then the main bulk of the article, and you can also upload an image related to your article.

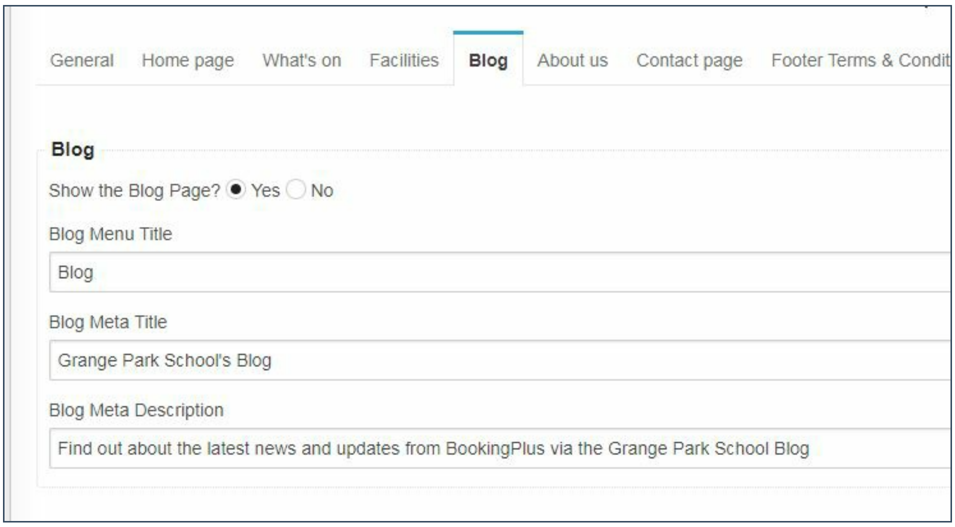


A few ideas of content for your articles include: New clubs & classes starting, events, school events, partnership working, community matters, new facilities becoming available (such as an astro pitch) etc.

This is an example of how the finished article can look, from our Grange Park Demo venue website:



Once you are happy with your first article, you need to enable the blog feature on your website. This is done in the Manage Tab - Edit Website - Blog sub-tab.



Tick Yes to show the Blog Page and complete the Title, Meta Title and Meta Description that you would like to use on your Blog Page. The two Meta fields will again help a Search engine to link searches to your website. Then click Save at the top of the page. You've now published your first article!!!

Going forward, you won't need to do the last part of this article as the Blog page is now permanently enabled on your website, unless you decide to switch it off. Happy Blogging!

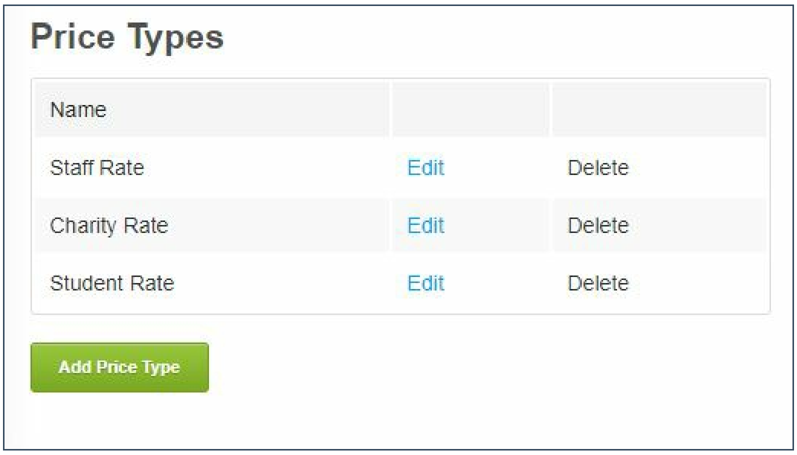
Adding additional price types

Last Modified on 03/02/2021 6:21 pm GMT

In addition to the Standard and Concessionary price types on a bookable space, you can create hourly rates via the Manage tab, to record multiple prices against a space for bookings.

To set this feature up, click into the **[Manage]** tab, and scroll down the **[Venue Management]** sub tab to the very bottom of the page.

Click **Add Price Type**, insert a Name and click **Save**. Please note; there is a limit of 25 characters for the name.

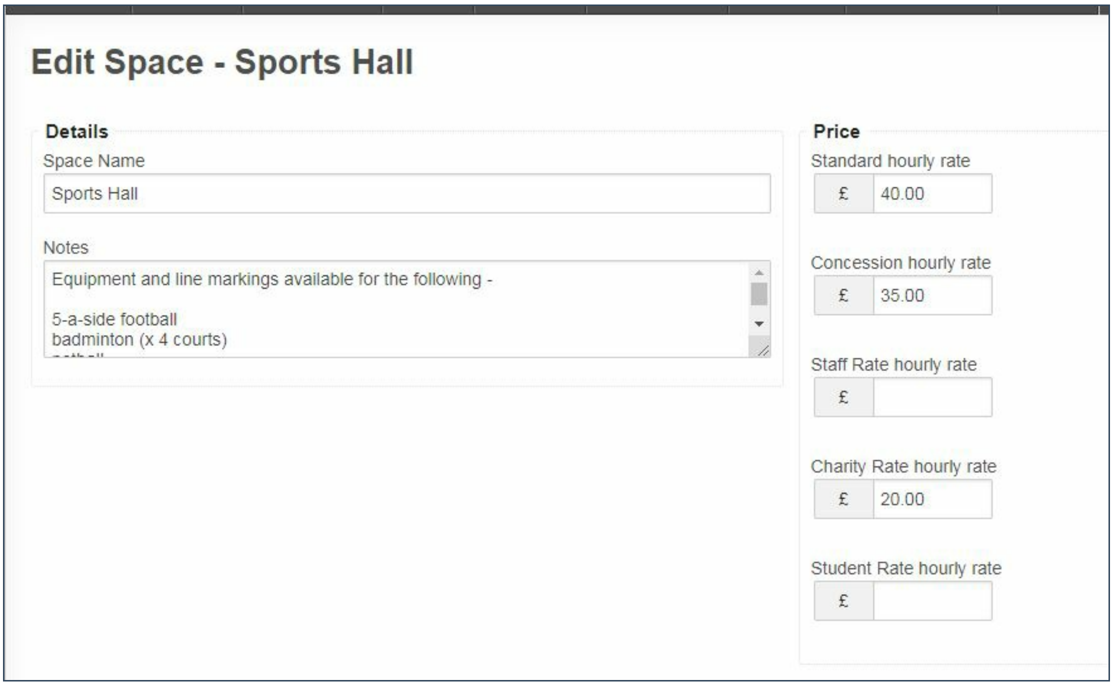


You can add as many different price types here as needed.

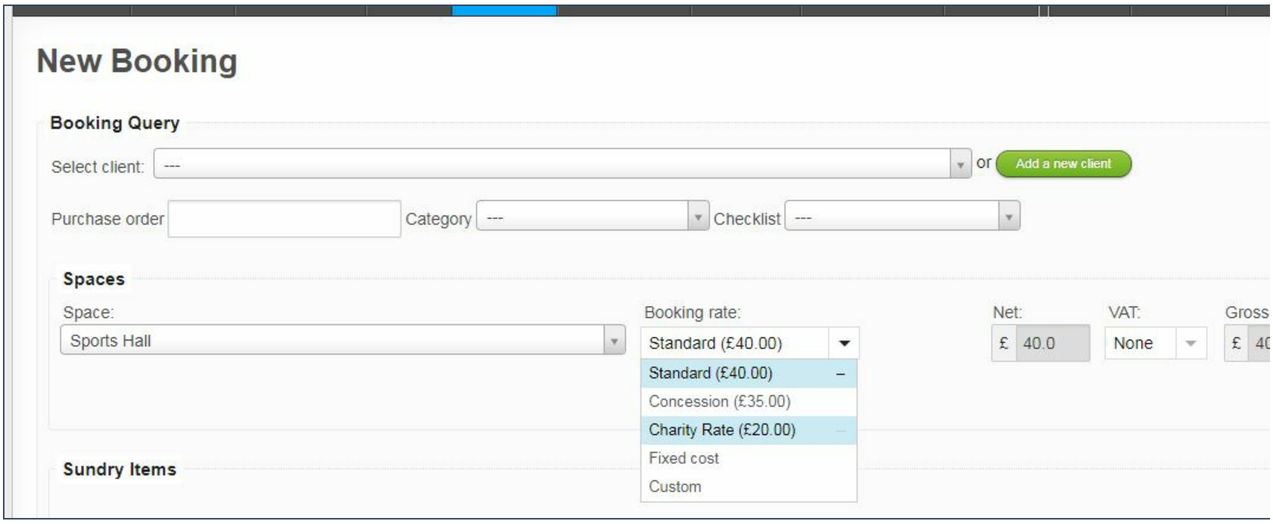
Then to use a new price type against a room, on the same page, click **Edit** on a **Bookable Space**, and you will notice all of your price types now appear. In order to get these to show on the Bookings Form, enter a price against the type needed and click **Save** at the bottom of the page.

Please note:

- You do not need to populate rates against rooms/spaces where they are not needed.
- You can use a Price Type against all of your Rooms/spaces, and have the ability to allocate a different rate for every room/space.



It will then show on the bookings and enquiry forms, in the price drop down only on the rooms/spaces it is set against.



You can then edit the rate when needed as usual in the Manage tab by editing a Bookable Space. Please note the new rate will then only apply to future bookings, it will not affect bookings that have already been created. If you wish to remove this rate from a Bookable space you can do so in the same Edit page by deleting the value, and click **Save**.

Please note: once a Price Type has been used in a room, it cannot be deleted from the Manage tab.

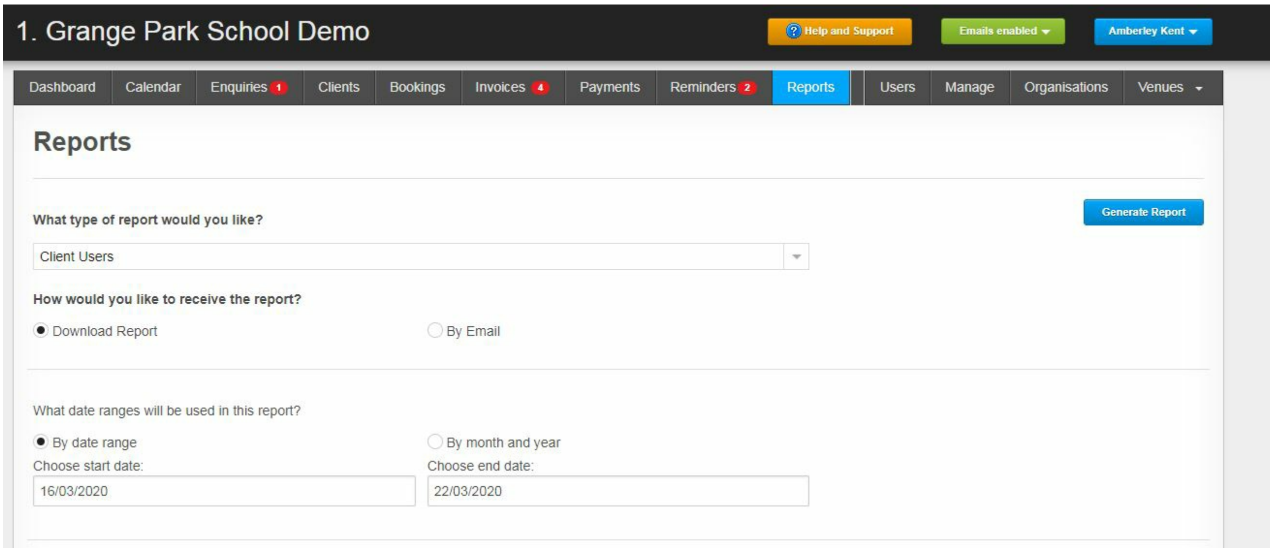
Mass cancellations

Last Modified on 02/11/2020 10:17 am GMT

In order manage mass cancellations due to weather or school shutdowns, we have a few tips to notify your clients as quickly and effectively as possible.

Email Notifications

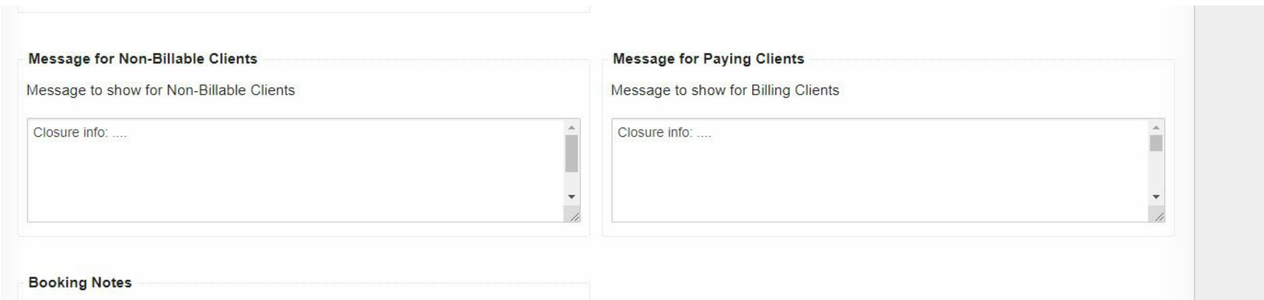
Firstly, although you can't send out emails to multiple users through BookingsPlus, you can use the Client Users or All Clients report to quickly gather all necessary emails to Blind Copy in using your email software. To do this go to your Reports tab and click on the report 'Client Users' or 'All Clients' (depending on if you want to get all users or just the client contact email) within the dropdown. For either report you do not need to select a time frame as it will pick up all existing users/clients at your venue, so just click Generate Report. It should download in less than a 30 seconds.



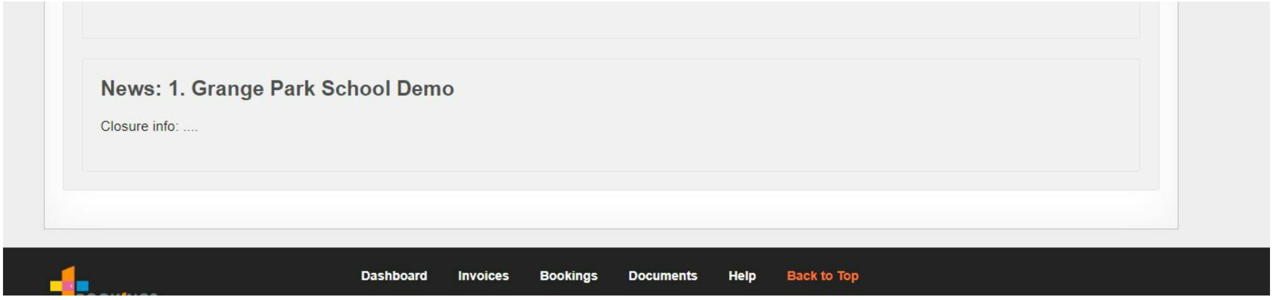
Please ensure you do then only Blind Copy in all email addresses for Data Protection.

Message in client login

Secondly, you can put a message on your clients Dashboard that they will be able to see once they have logged in. To do this go to the Manage Tab - Edit Venue - Client Login, and scroll down to 'Message for Non-Billable Clients' and 'Message for Paying Clients'. Here you can type in a message, Save the page and display a message to client informing them of any closures.



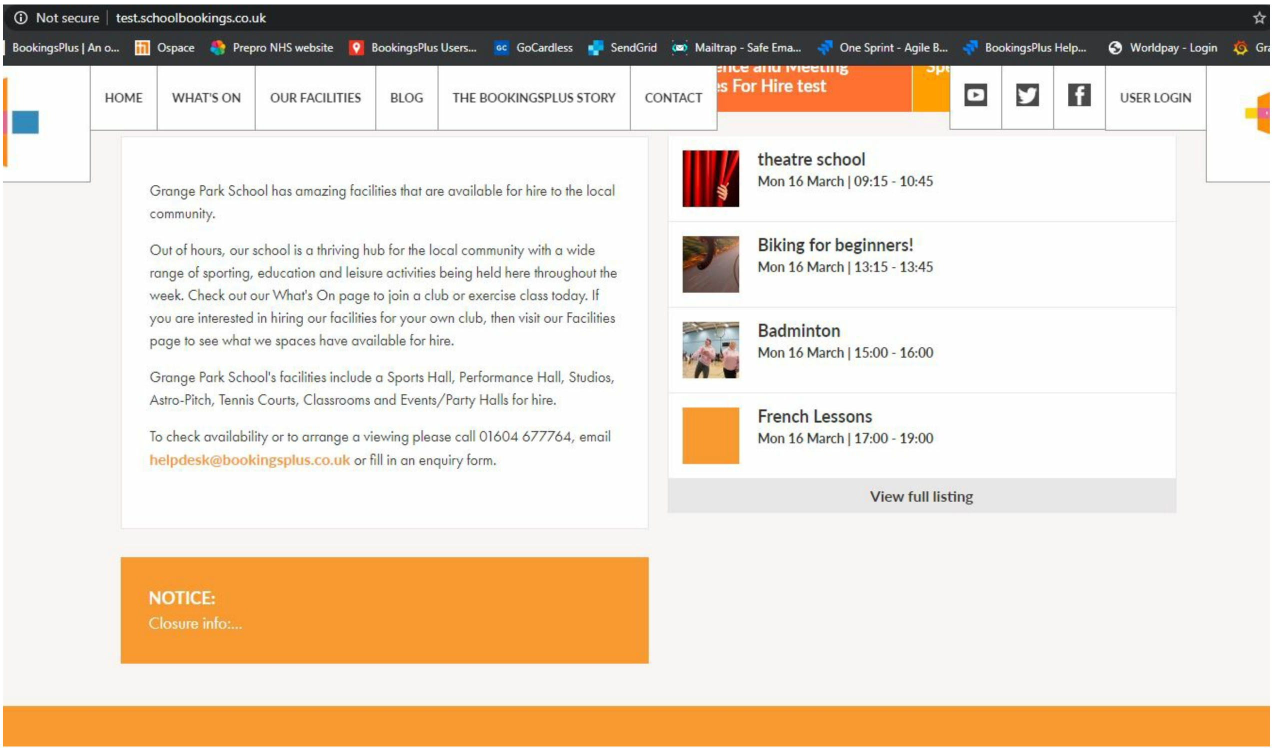
This then displays at the bottom of the Dashboard for clients:



Message on your Website

Next, you can put a message on your Website's dashboard to inform both hirers and their clients/the general public of the venue closure. To do this go to your Manage Tab, Edit Website, Home Page and scroll down to Homepage Announcement:

Once you have saved this it was show on your websites homepage:

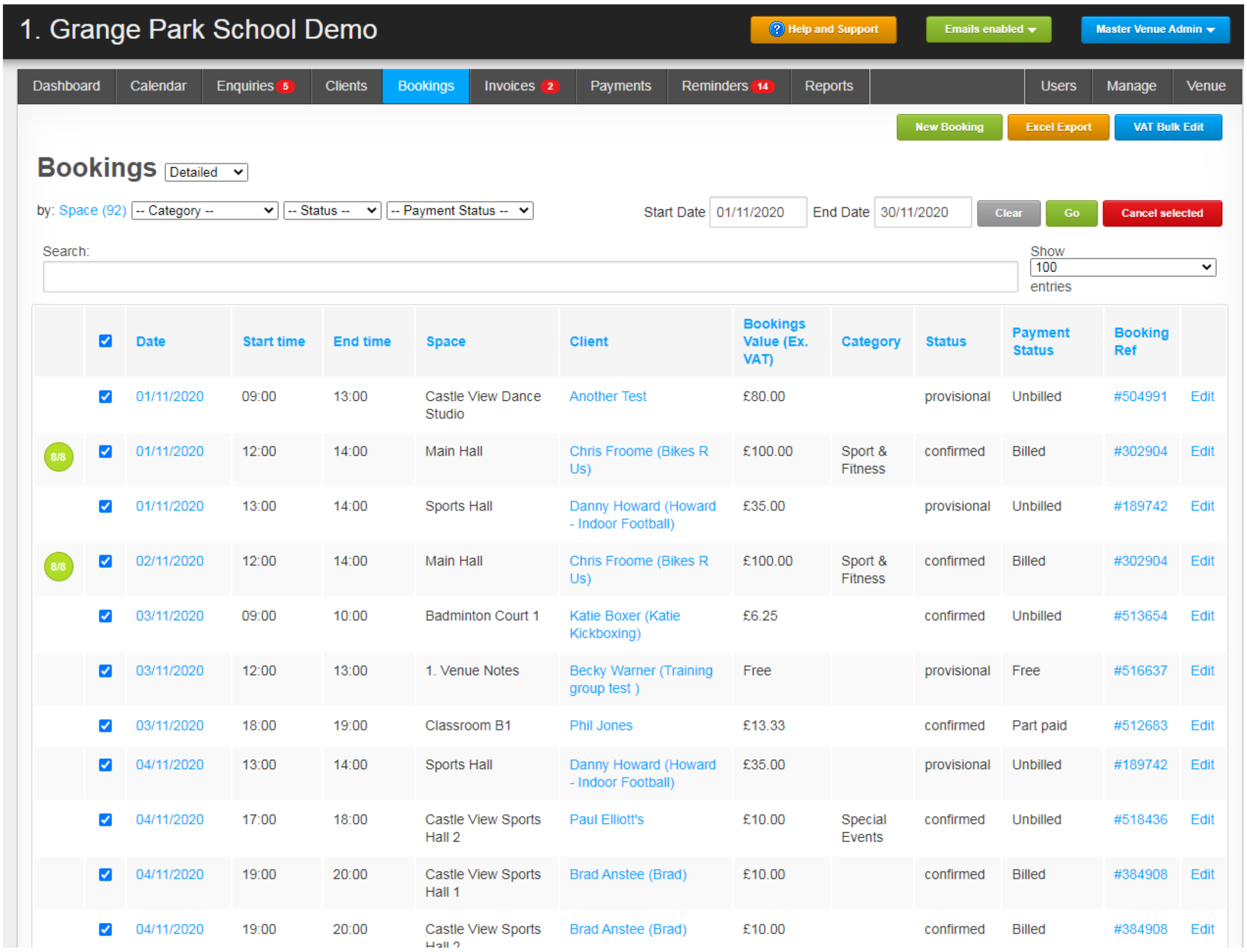


If you also have social media accounts you can also announce any sudden closures there.

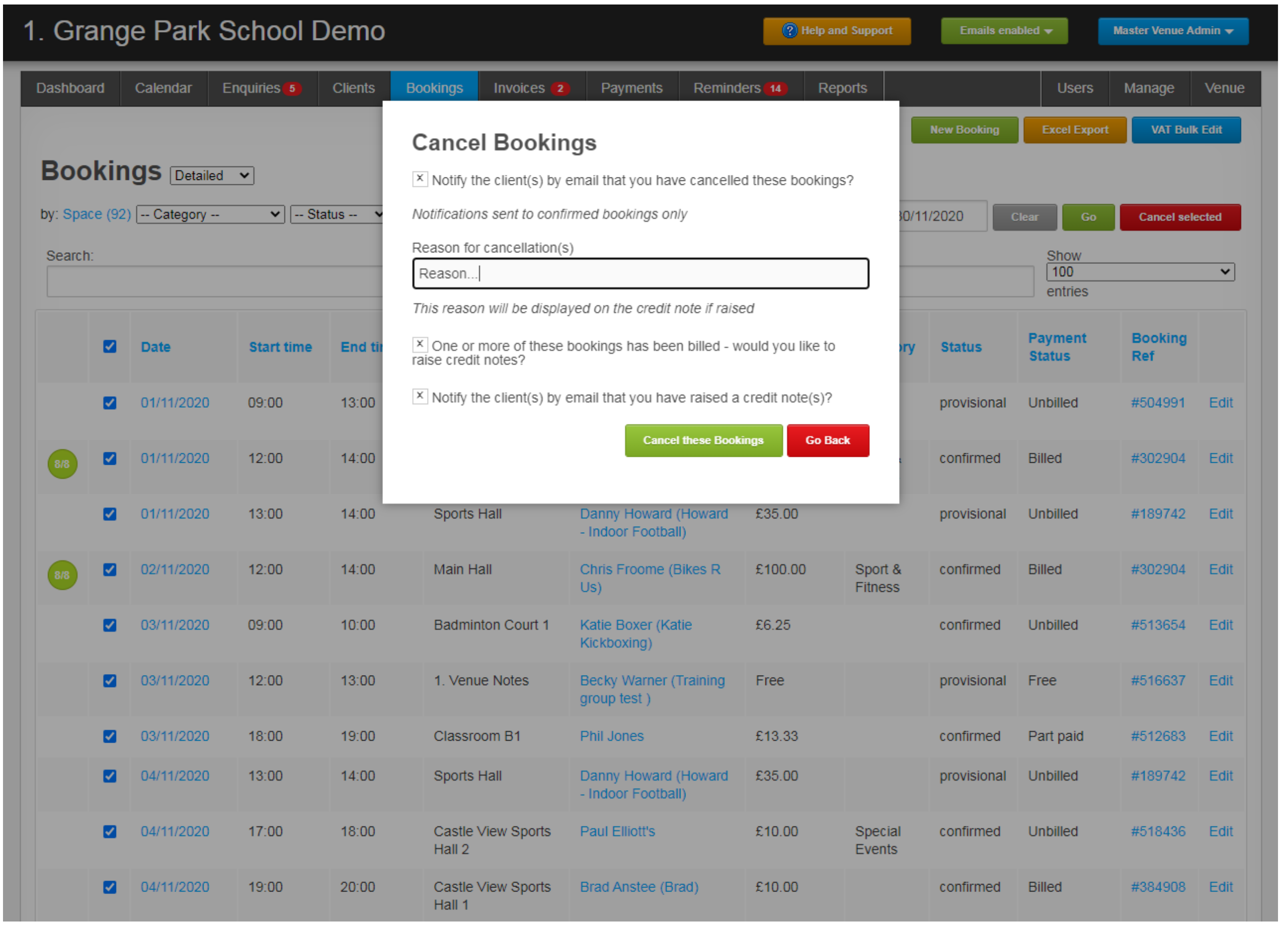
Booking cancellations and venue closure

Finally, to cancel any existing bookings and stop further bookings being put in the calendar there are two steps to follow:

1. We would always advise performing cancellations, especially for a large number of bookings, from the Bookings Tab. From here you can filter by Space, Category, Status, Payment Status Time frame, and using the search bar, by client name. Once you have filtered, click Go, Show 100 Entries, and use the top tick box on the left hand side to select all bookings on the page.

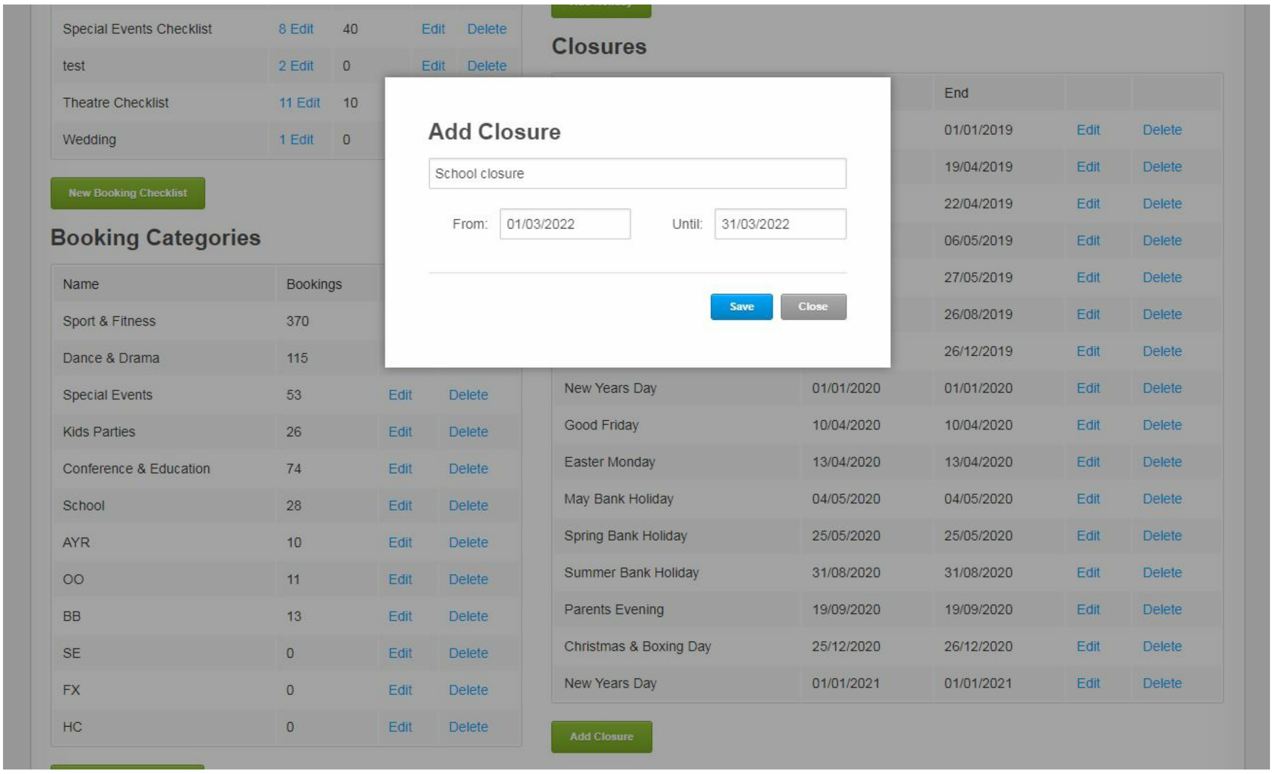


Then click to 'Cancel Selected'. You will then see a pop-up giving you the option to also notify clients of their booking cancellations and give a reason why in the Text box. If any bookings were billed then you will also be given the option to raise Credit Notes and send another email notification.

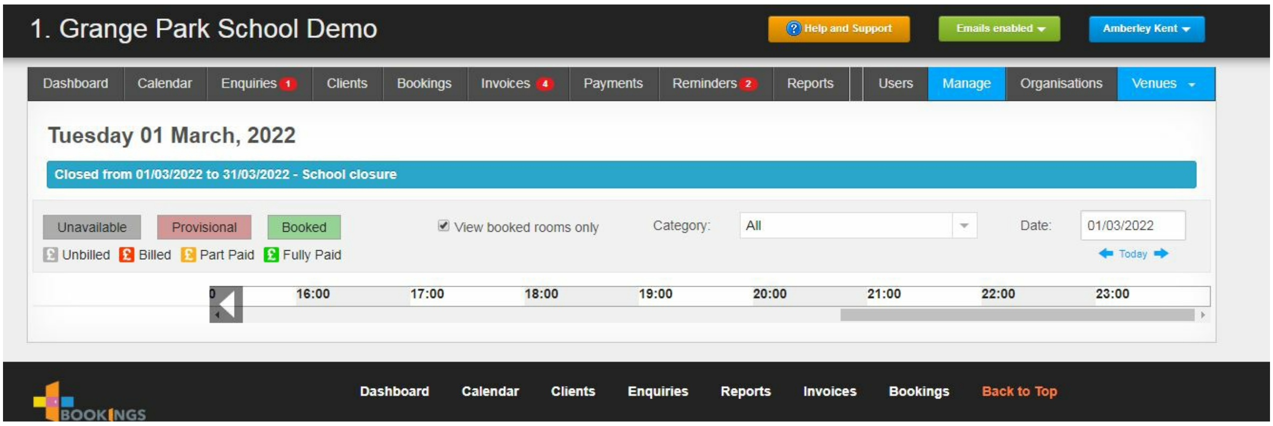


The bookings will then cancel and all client booking users will receive an email notification.

2. In order to stop any further bookings being put into the calendar, you can create Venue Closures. To do this, go to the Manage Tab, Scroll down to Closures. Click to Add a new Closure, enter the Start and End date and click to Save.



You will then see this closure as an administrator in the calendar, and the system will not allow you to create a new booking on that date:



For any further advice please contact us at the helpdesk on helpdesk@bookingsplus.co.uk

Troubleshooting - Hirer not receiving emails

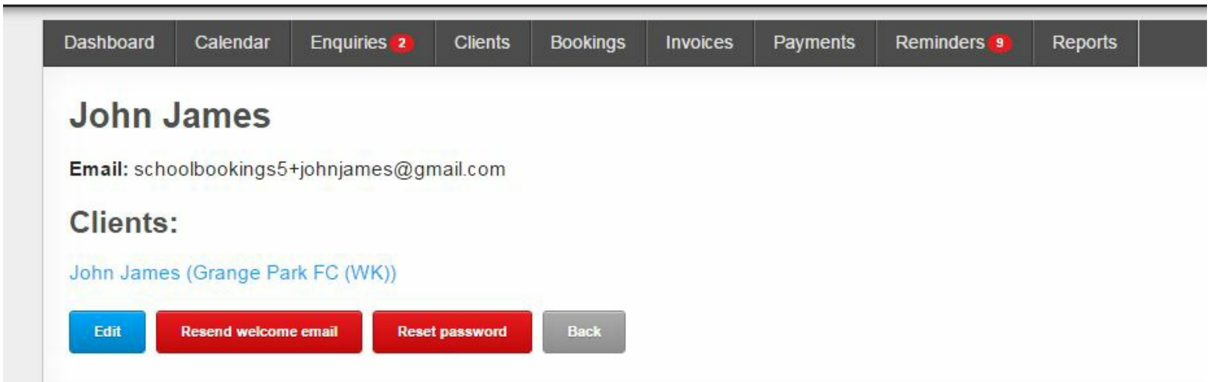
Last Modified on 03/02/2021 6:27 pm GMT

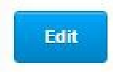
If your hirer isn't receiving BookingsPlus emails, follow our troubleshooting guide to identify the issue:

STEP 1 - Check their email address is correct on their User ID

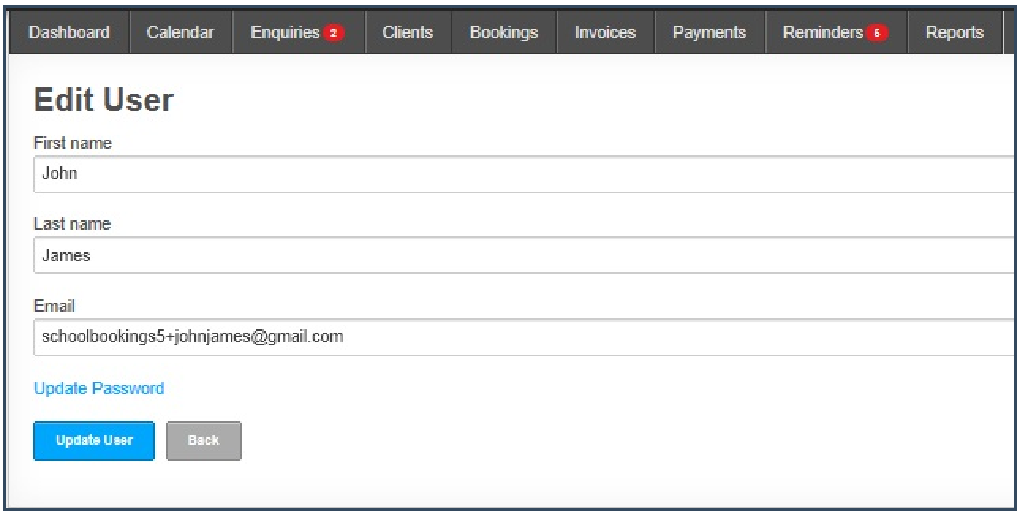
- Select the **Clients** tab, search and **View** your client

- Click the ID hyperlink within the Client User Logins section and check the email address is correct:

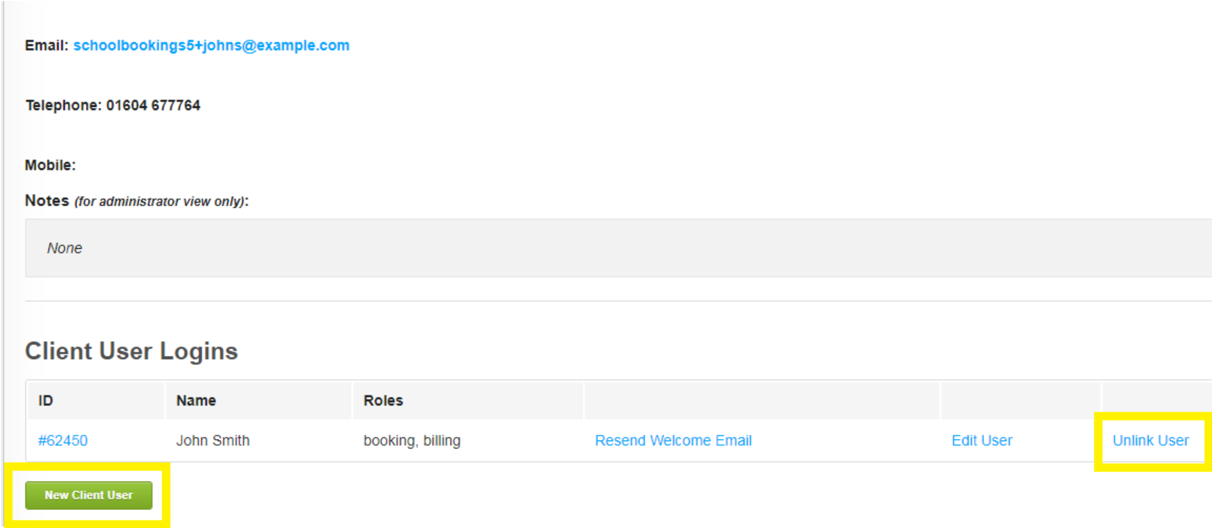


- If changes are required, click on 

and make required changes



If the email is not correctly updating, this may be because it is also linked to another venue within BookingsPlus. In this case go back to the **Clients** tab, click **View** and in the **Client User Logins** section click to **Unlink** the client. Once Unlinked, you can Click on **New Client User** to add a New User to the client with the correct email address.



STEP 2 - Check the email address is valid. There are several websites which you can use (eg mailtester.com)

STEP 3 - Ask them to check their Spam/Junk folders as messages do occasionally find their way in there!

STEP 4 - Emails may sometimes be blocked by firewalls (common with company/organisation email addresses). Ask the hirer to log-on at home using their own PC, or perhaps using a smartphone or tablet. Alternatively, ask the hirer if they have an alternative email address they can use.

STEP 5 - If none of the above work, the Master Venue Admin can manually set a password for them. Either tell them over the phone or by email what it is & see whether they can log-on and subsequently receive emails. This can be done on the **Users** or from their client page (see above steps to access) tab. Please note the Welcome Email is sent from a different email address to all the other automated emails.

STEP 6 - If, after all the above, it's still not working then contact us at the Helpdesk (**01604 677764** or email **support@bookingsplus.co.uk**). We are able to track the automated emails sent from BookingsPlus & will be able to see whether they are actually reaching your hirer. We are happy to talk to your hirer directly & talk them through any issues they may be experiencing.

Watch our video tutorial:

Invoice not generating

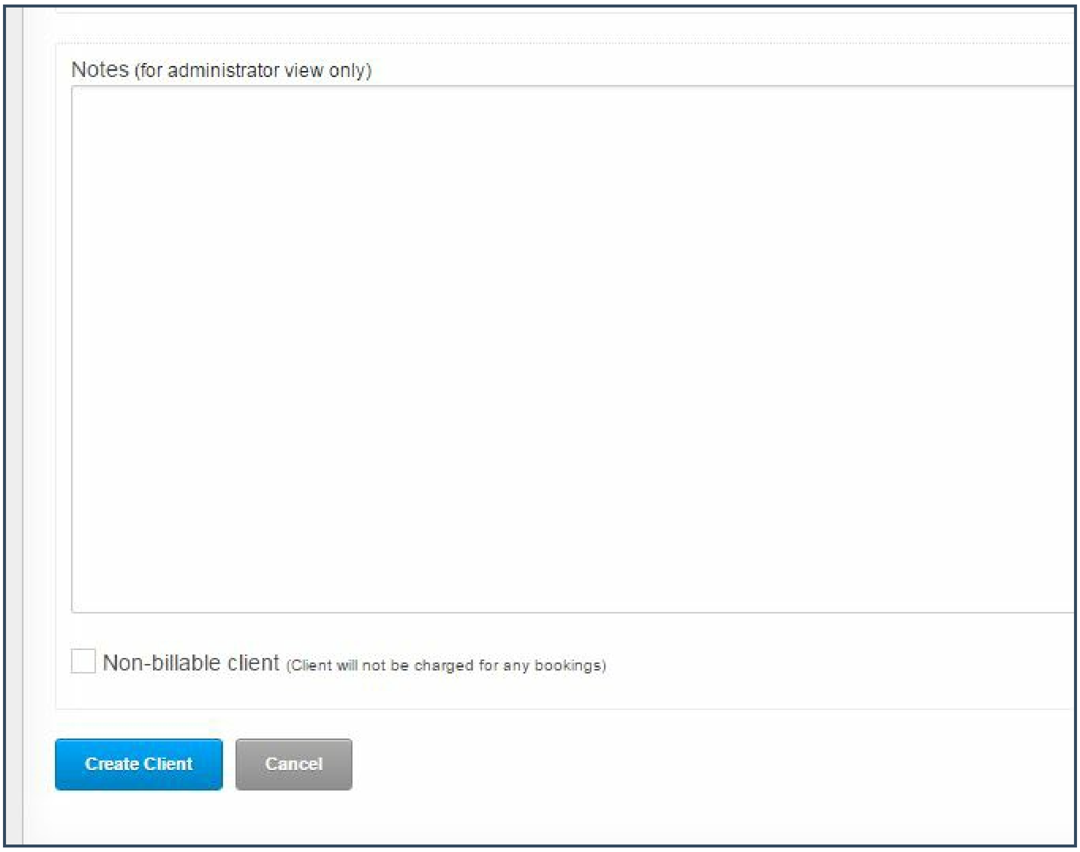
Last Modified on 03/02/2021 6:27 pm GMT

If you are trying to generate an invoice but it isn't appearing, here's a few steps you can take to identify why.

Firstly, ensure the booking is not still provisional as only a confirmed booking can be invoiced. This can be checked by going to the bookings tab, locating the booking and looking at the status column.

Next, ensure the booking has a value against it. A free or zero value booking won't pull through onto an invoice (unless there are other billable bookings within the selected period).

Is your client set up as a non-billable client (see below)? If so, no invoices will be generated.



Has a draft invoice already been created against the booking? To check this, either go to the **Invoices** tab and click on the Draft tab, or check the Client Account for draft invoices. If this is the case, review the invoice to check it is still correct and issue as normal.

If none of these are applicable, then please do give us a call at helpdesk on 01604 677764.

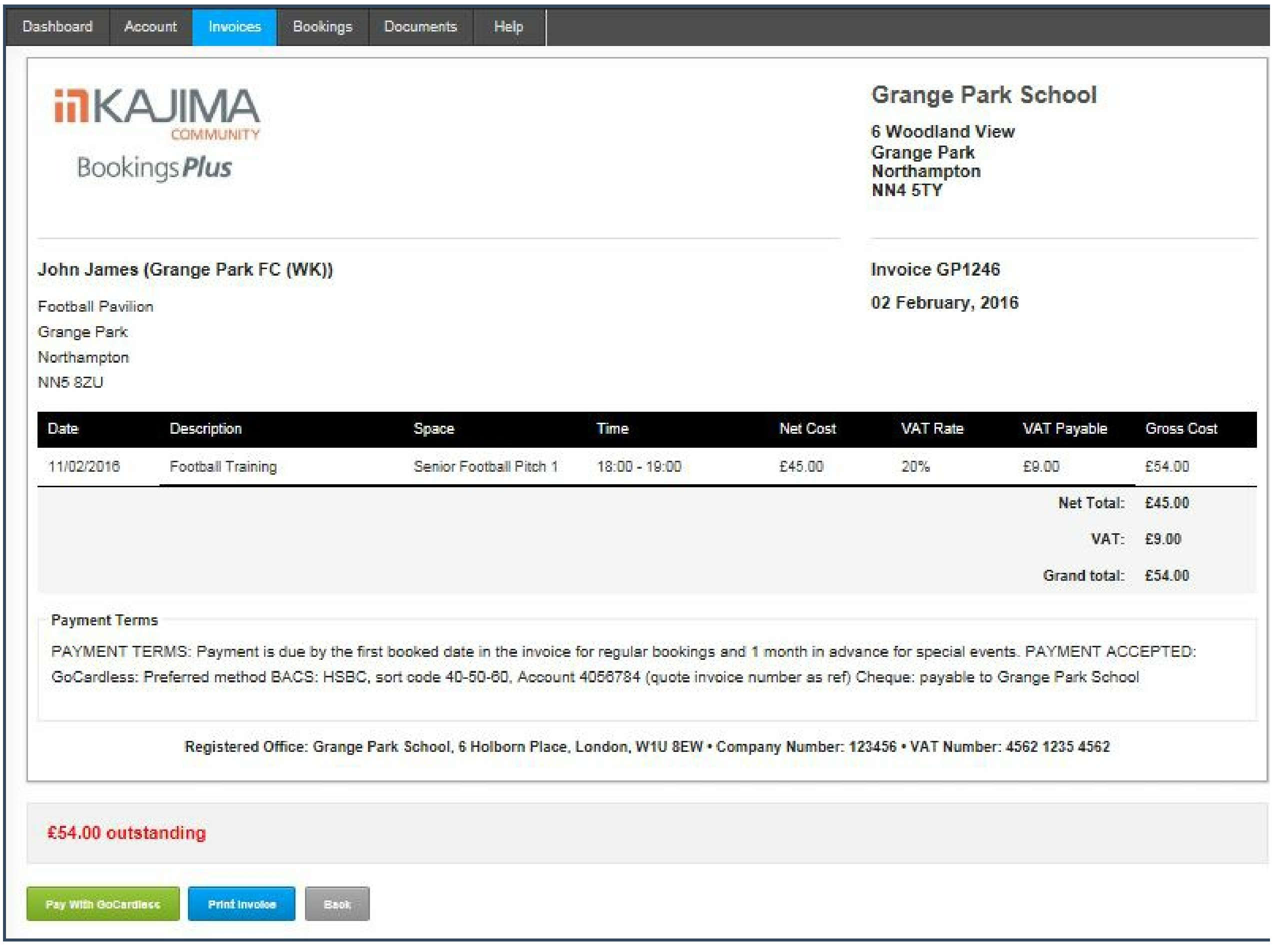
Paying an invoice by GoCardless (Hirer)

Last Modified on 03/06/2021 9:26 am BST

Paying an Invoice on BookingsPlus is easy with our built in payment gateways. Choose from **GoCardless** or **Stripe** (or both!) to make collecting payments more efficient for you and your clients.

Remember that only the full invoice amount can be paid, so make sure the billing period matches their payment agreement & that any Credit Notes or previous Payments have been Fully Allocated.

GoCardless - See GoCardless for more information on how GoCardless processes payments, and the associated fees.


Dashboard | Account | Invoices | Bookings | Documents | Help

KAJIMA COMMUNITY BookingsPlus

Grange Park School
6 Woodland View
Grange Park
Northampton
NN4 5TY

John James (Grange Park FC (WK))
Football Pavilion
Grange Park
Northampton
NN5 8ZU

Invoice GP1246
02 February, 2016

Date	Description	Space	Time	Net Cost	VAT Rate	VAT Payable	Gross Cost
11/02/2016	Football Training	Senior Football Pitch 1	18:00 - 19:00	£45.00	20%	£9.00	£54.00

Net Total: £45.00
VAT: £9.00
Grand total: £54.00

Payment Terms
PAYMENT TERMS: Payment is due by the first booked date in the invoice for regular bookings and 1 month in advance for special events. PAYMENT ACCEPTED: GoCardless: Preferred method BACS: HSBC, sort code 40-50-60, Account 4056784 (quote invoice number as ref) Cheque: payable to Grange Park School

Registered Office: Grange Park School, 6 Holborn Place, London, W1U 8EW • Company Number: 123456 • VAT Number: 4562 1235 4562

£54.00 outstanding

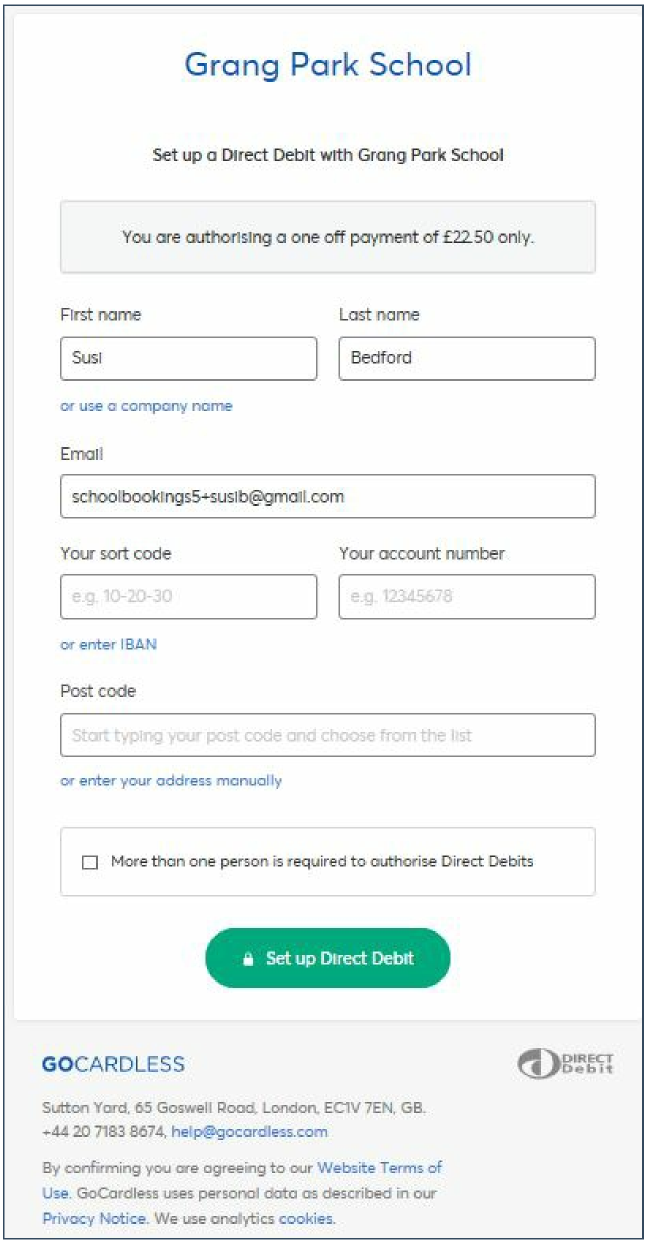
Pay With GoCardless | Print Invoice | Back

After selecting the "Pay with GoCardless" button, your hirer will need to fill out a form, and click 'Set up Direct Debit' to initiate the payment.

The direct debit set-up relates to this payment only, and no further funds will be taken.

GoCardless will then create a mandate so that on subsequent occasions that they click to make a payment they will not need to fill out their Account details (as stated to the client on the pop-up above which will appear before the below form).

Each time you request a payment, the hirer will need to authorise the payment by clicking to "Pay with GoCardless" on their invoice.



Grang Park School

Set up a Direct Debit with Grang Park School

You are authorising a one off payment of £22.50 only.

First name: Susi

Last name: Bedford

or use a company name

Email: schoolbookings5+susib@gmail.com

Your sort code: e.g. 10-20-30

Your account number: e.g. 12345678

or enter IBAN

Post code: Start typing your post code and choose from the list

or enter your address manually

☐ More than one person is required to authorise Direct Debits

Set up Direct Debit

GOCARDLESS

DIRECT Debit

Sutton Yard, 65 Goswell Road, London, EC1V 7EN, GB.
+44 20 7183 8674, help@gocardless.com

By confirming you are agreeing to our Website Terms of Use. GoCardless uses personal data as described in our Privacy Notice. We use analytics cookies.

Once they click on the 'Set up Direct Debit' option, a confirmation screen will appear. Once completed, the invoice will immediately show as 'Pending' on both their account & the administrator account.

Hirers do need to be aware that although they have authorised the transaction, the money is only collected by GoCardless after 3-4 days. They must ensure funds are available at this stage, otherwise the payment will fail (should this occur, you will receive notification from GoCardless, and a note will flag on your "Dashboard" via the 'Payments Requiring Attention section').

If they need to change the account details stored with GoCardless, they can either cancel the mandate with their bank, or a venue Administrator can cancel the mandate from within their GoCardless account.

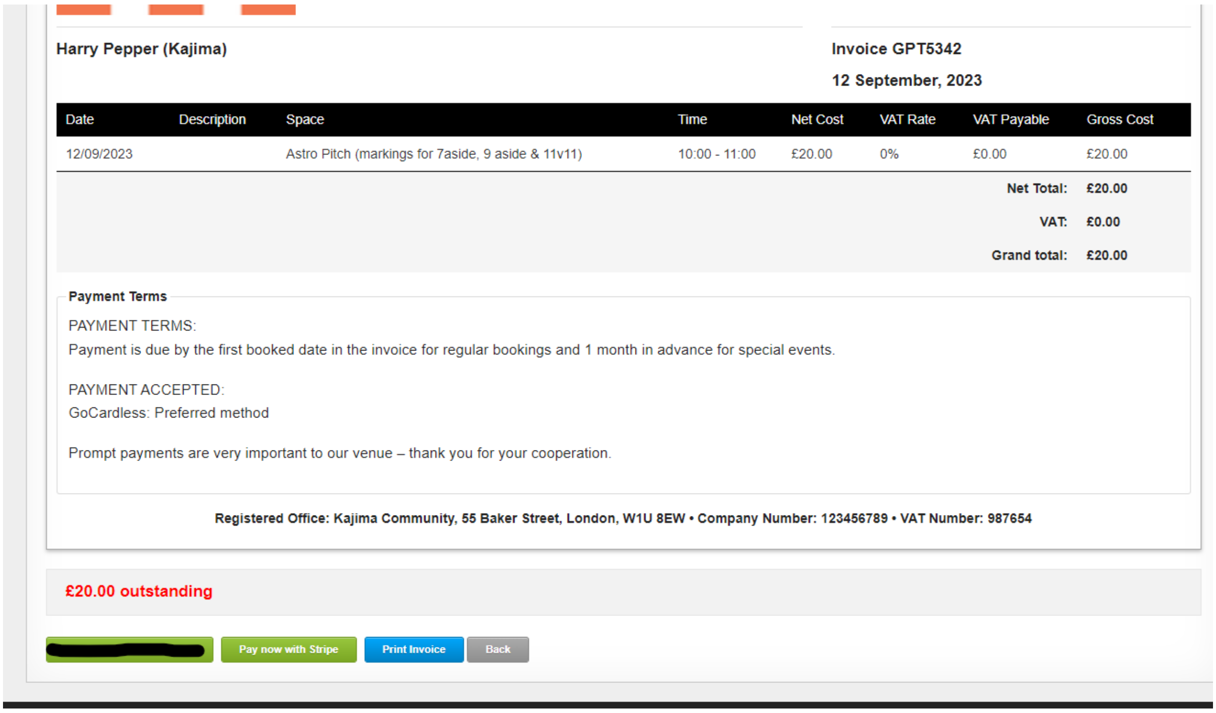
Payments from double signatory accounts:
Payments from accounts with double signatories are accepted with GoCardless, and your hirer will need to tick the relevant box in the form above.

They will then be sent a mandate (via email) from GoCardless to fill out, which will require 2

signatories. Once they send this back to GoCardless, the mandate will be matched to the payment, and the payment will then be processed by GoCardless.

This mandate can then be used for future payments, so that the hirer does not need to fill out the form each time they make a payment.

Stripe -


Harry Pepper (Kajima)

Invoice GPT5342

12 September, 2023

Date	Description	Space	Time	Net Cost	VAT Rate	VAT Payable	Gross Cost
12/09/2023		Astro Pitch (markings for 7aside, 9 aside & 11v11)	10:00 - 11:00	£20.00	0%	£0.00	£20.00
						Net Total:	£20.00
						VAT:	£0.00
						Grand total:	£20.00

Payment Terms

PAYMENT TERMS:
Payment is due by the first booked date in the invoice for regular bookings and 1 month in advance for special events.

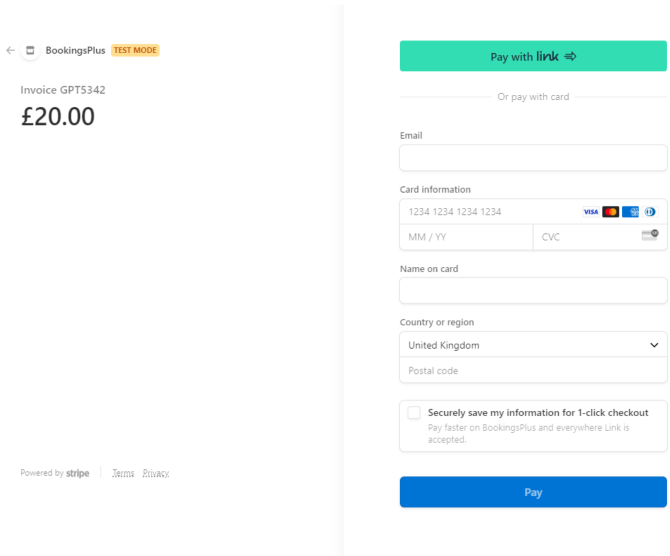
PAYMENT ACCEPTED:
GoCardless: Preferred method

Prompt payments are very important to our venue – thank you for your cooperation.

Registered Office: Kajima Community, 55 Baker Street, London, W1U 8EW • Company Number: 123456789 • VAT Number: 987654

£20.00 outstanding

[redacted] Pay now with Stripe Print Invoice Back



Once the "Pay now with Stripe" option is selected, clients will be taken to a form to enter their debit

card details. Here they'll also see the option to securely save their information for 1-click checkout in future.

If that option is selected, any future times that the client selects "Pay now with Stripe", the payment will process using their saved card.

Should your client ever wish to change/update that card, the "customer" can be deleted from your 'Stripe' login, and the next time they go to make a payment they'll be prompted to enter new details.

Payments made with 'Stripe' process immediately, so if there are issues such as insufficient funds or incorrectly entered card details, these will be flagged immediately to the customer to rectify.

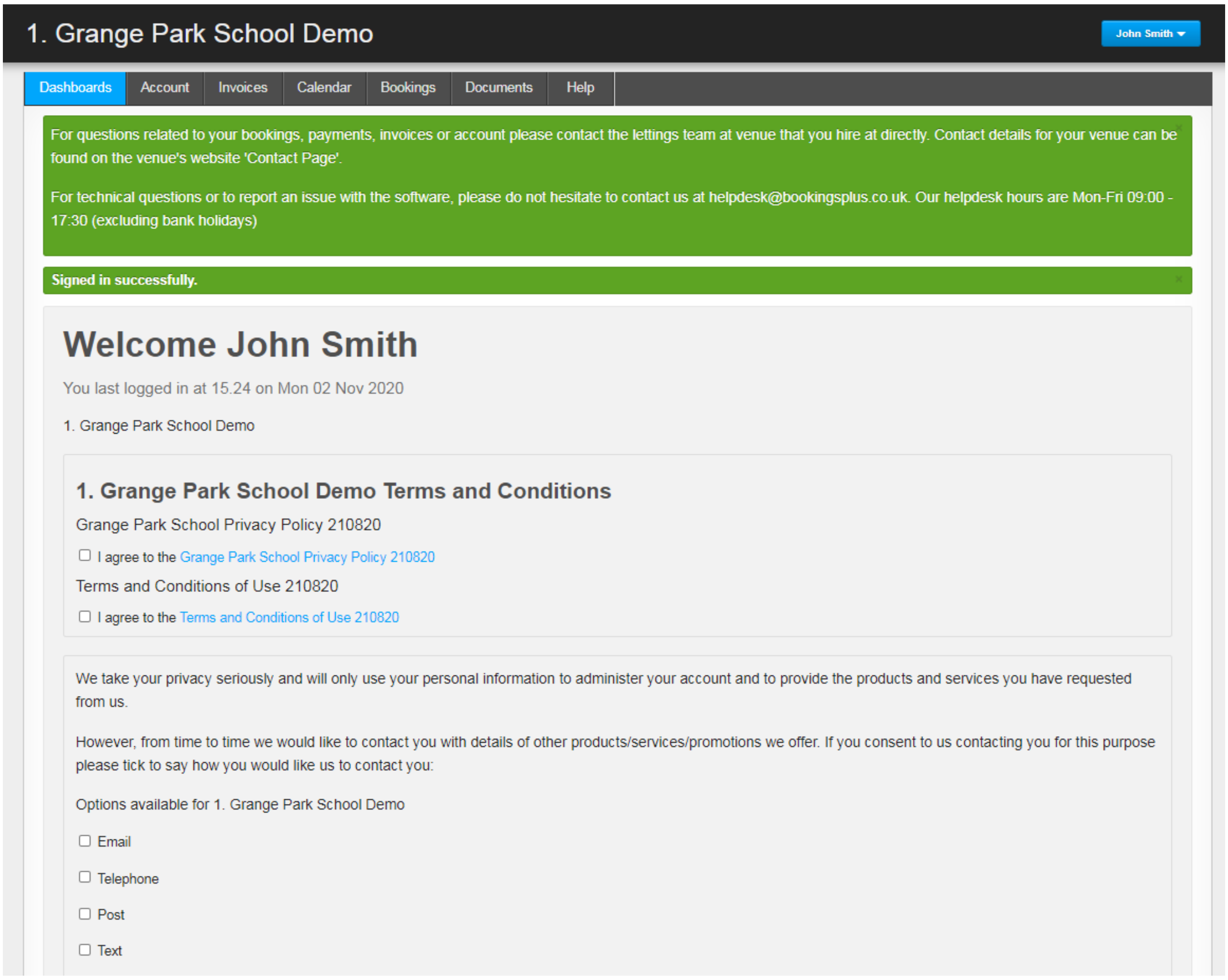
After payment has been made, the status of the payment will immediately be 'Paid', with the 'Pending' flag not applicable.

Confirming a provisional booking (Hirer)

Last Modified on 03/02/2021 6:32 pm GMT

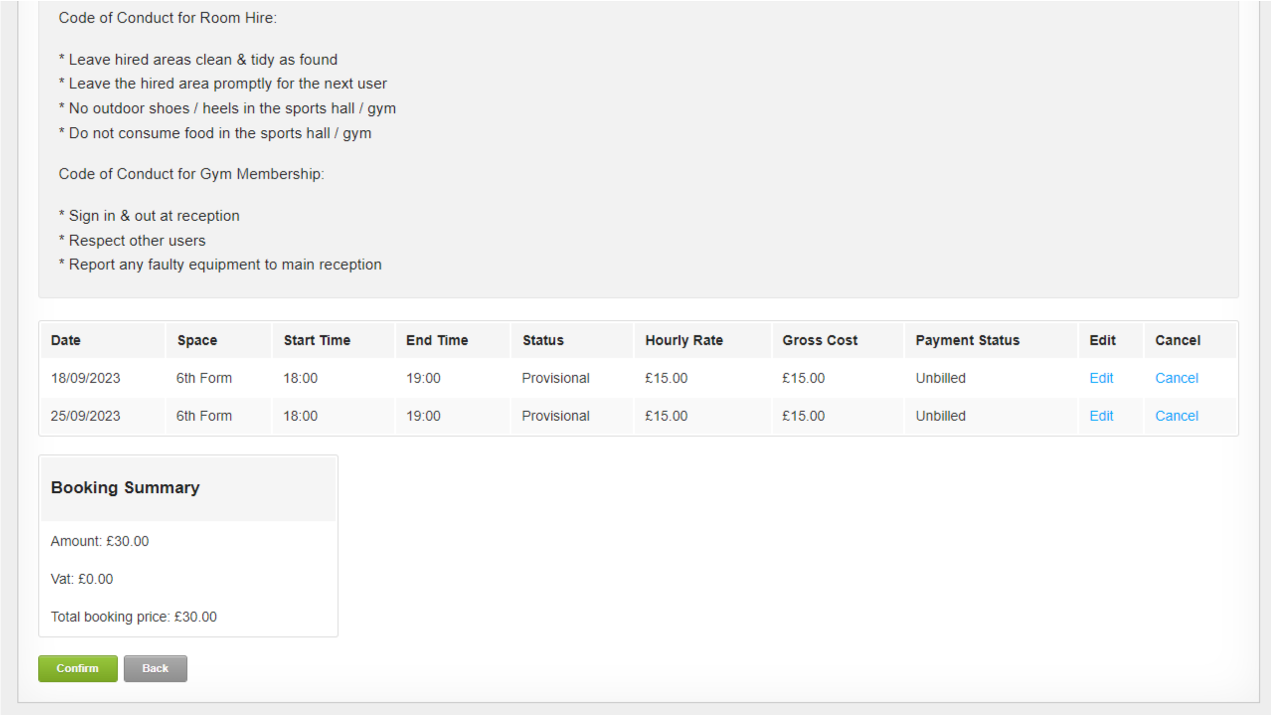
Your hirers are able to view & confirm their bookings within BookingsPlus . This means that they will have to accept your T&C's and Privacy Policy, and also take responsibility for checking the dates/times/spaces included within their booking.

When they log onto their account, they will see the **Dashboard** tab. They will need to accept Terms and Conditions and the Privacy Policy before their 'Bookings' or 'Invoices' become visible.



If the client tries to view invoices/bookings before they have accepted the T&C's, a red banner will appear across the top of the page. As soon as they have clicked to accept the T&C's and Privacy Policy, they will be able to see any 'Provisional Bookings' or 'Outstanding Invoices' on the 'Dashboard', as well as being able to navigate freely around the other tabs.

To confirm a booking, click on **View** hyperlink alongside the booking.



Code of Conduct for Room Hire:

* Leave hired areas clean & tidy as found
* Leave the hired area promptly for the next user
* No outdoor shoes / heels in the sports hall / gym
* Do not consume food in the sports hall / gym

Code of Conduct for Gym Membership:

* Sign in & out at reception
* Respect other users
* Report any faulty equipment to main reception

Date	Space	Start Time	End Time	Status	Hourly Rate	Gross Cost	Payment Status	Edit	Cancel
18/09/2023	6th Form	18:00	19:00	Provisional	£15.00	£15.00	Unbilled	Edit	Cancel
25/09/2023	6th Form	18:00	19:00	Provisional	£15.00	£15.00	Unbilled	Edit	Cancel

Booking Summary

Amount: £30.00

Vat: £0.00

Total booking price: £30.00

Confirm Back

From this screen, they are able to scroll up/down the full list of dates under that booking. If they are correct, they can click to 

. If amendments are required, these can only be done by an administrator. As soon as the bookings are confirmed by the hirer, this will update on your system by an entry appearing on the 'Dashboard', the status updating to 'Confirmed' & the calendar booking showing as 'Confirmed'.

If your venue has Instant Pay switched on, clients will also see a "Pay as you Go" option when confirming. Find out more about how hirers can confirm their bookings when this option is switched on here!

With Self-Booking activated as well, hirers can amend/cancel line items within their booking before confirming. Read through this article to see what clients can alter with this activated.

Client Self-Booking guide

Last Modified on 12/09/2023 10:40 am BST

Guide for clients to manage their bookings online

With BookingsPlus you can allow your clients to book their own sessions online, via their client account.

This quick and simple booking tool means they can book sessions with you out of normal office hours, at a time which may be more convenient for them, online and on the go!

If you would like your clients to benefit from Self-Booking, contact our Helpdesk to have this feature activated at your venue(s): **helpdesk@schoolbookings.co.uk**

Once that's activated, you can send the below information to them as a step by step guide...

1. Login to the system

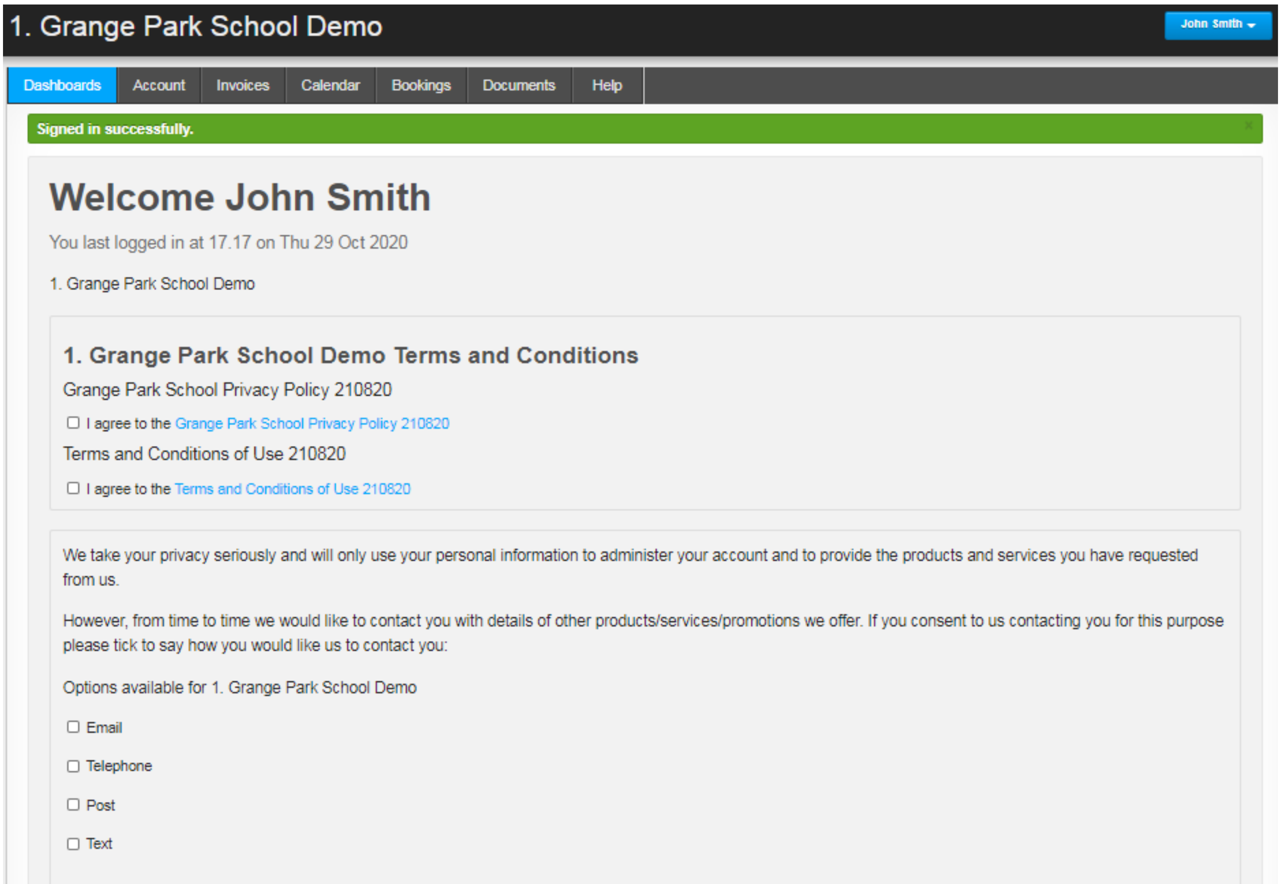
Login via https://my.schoolbookings.co.uk/users/sign_in

If you forget your password, there's a link to reset your password on that login page.

Once logged in, your Dashboard will be visible. From here you'll be able to see any actions required (bookings to confirm, invoices to pay etc).

If you wish to change your password at any point, click on the blue button with your name (top right of your screen) and select 'Edit Account'.

You are required to accept the venue's booking Terms and Conditions and Privacy Policy before your account is fully functional. If you wish to read a copy of the document, simply click to download. Once you're happy and ready to sign, tick to accept.



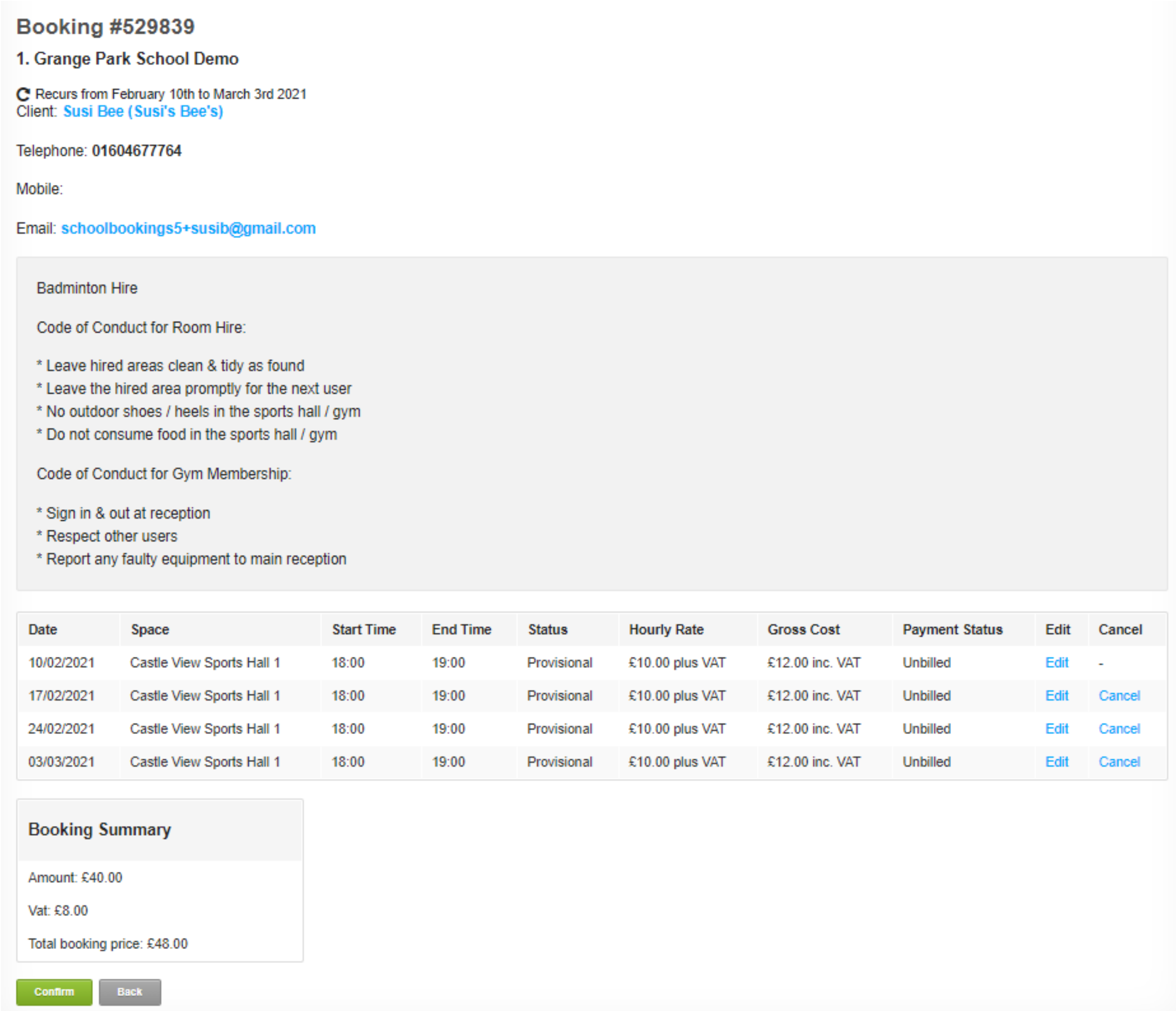
2. Confirm existing bookings

Any provisional bookings which have been made by the administrator will be visible on your dashboard.

You are required to check and confirm these bookings – to do this, click ‘View’ next to the booking. This will take you to the detail of the booking.

Once you’ve checked the dates/times/room which have been booked for you, click the green ‘confirm’ button at the bottom of the screen.

Please repeat this step for all provisional bookings which appear on the dashboard.



Booking #529839

1. Grange Park School Demo

Recurs from February 10th to March 3rd 2021
Client: Susi Bee (Susi's Bee's)

Telephone: 01604677764

Mobile:

Email: schoolbookings5+susib@gmail.com

Badminton Hire

Code of Conduct for Room Hire:

* Leave hired areas clean & tidy as found
* Leave the hired area promptly for the next user
* No outdoor shoes / heels in the sports hall / gym
* Do not consume food in the sports hall / gym

Code of Conduct for Gym Membership:

* Sign in & out at reception
* Respect other users
* Report any faulty equipment to main reception

Date	Space	Start Time	End Time	Status	Hourly Rate	Gross Cost	Payment Status	Edit	Cancel
10/02/2021	Castle View Sports Hall 1	18:00	19:00	Provisional	£10.00 plus VAT	£12.00 inc. VAT	Unbilled	Edit	-
17/02/2021	Castle View Sports Hall 1	18:00	19:00	Provisional	£10.00 plus VAT	£12.00 inc. VAT	Unbilled	Edit	Cancel
24/02/2021	Castle View Sports Hall 1	18:00	19:00	Provisional	£10.00 plus VAT	£12.00 inc. VAT	Unbilled	Edit	Cancel
03/03/2021	Castle View Sports Hall 1	18:00	19:00	Provisional	£10.00 plus VAT	£12.00 inc. VAT	Unbilled	Edit	Cancel

Booking Summary

Amount: £40.00

Vat: £8.00

Total booking price: £48.00

Confirm Back

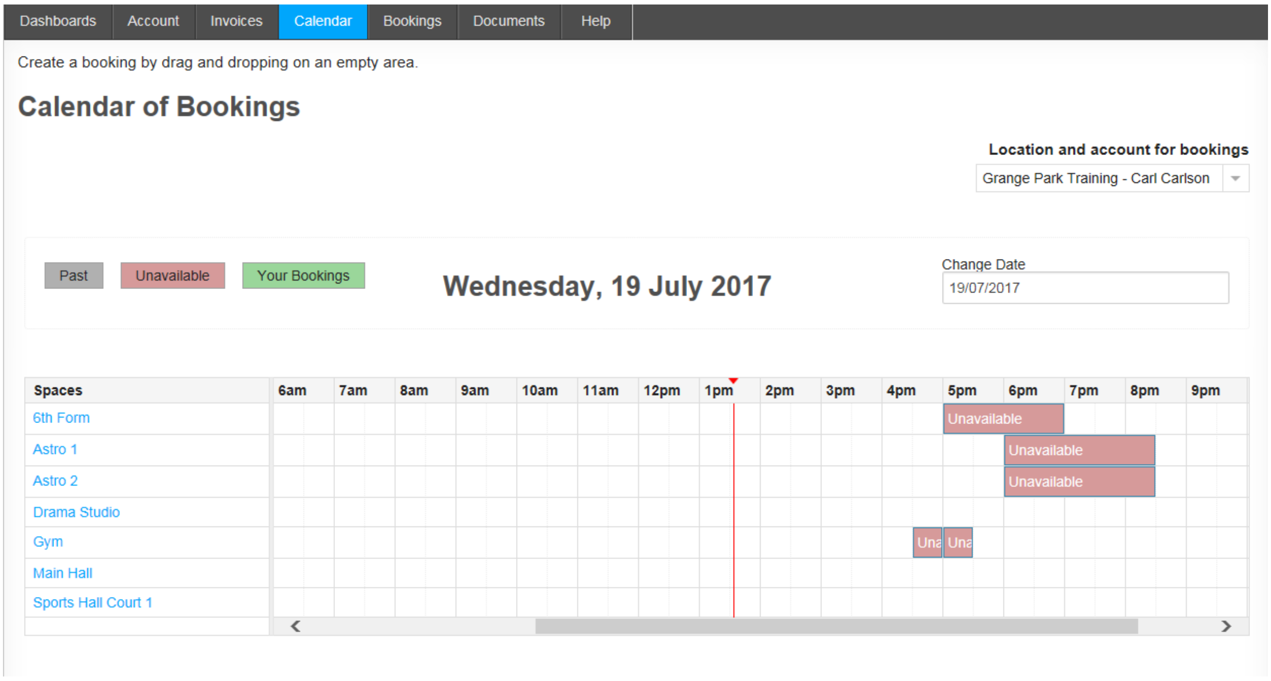
3. Check availability and make new bookings

You're able to check room availability and make new bookings via the 'Calendar' tab.

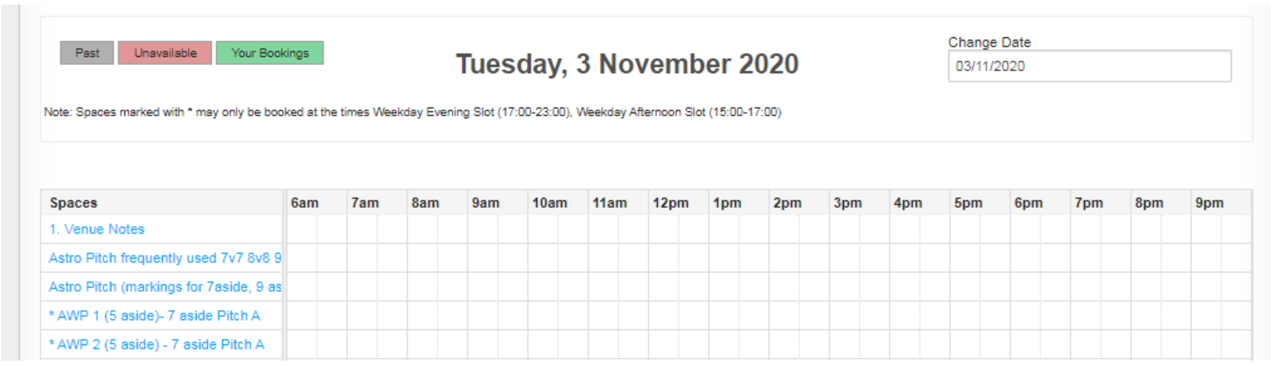
If you hire at multiple BookingsPlus venues, click the drop-down option at top right of screen to select the correct venue.

The calendar will show your bookings in green, as well as any unavailable slots in red.

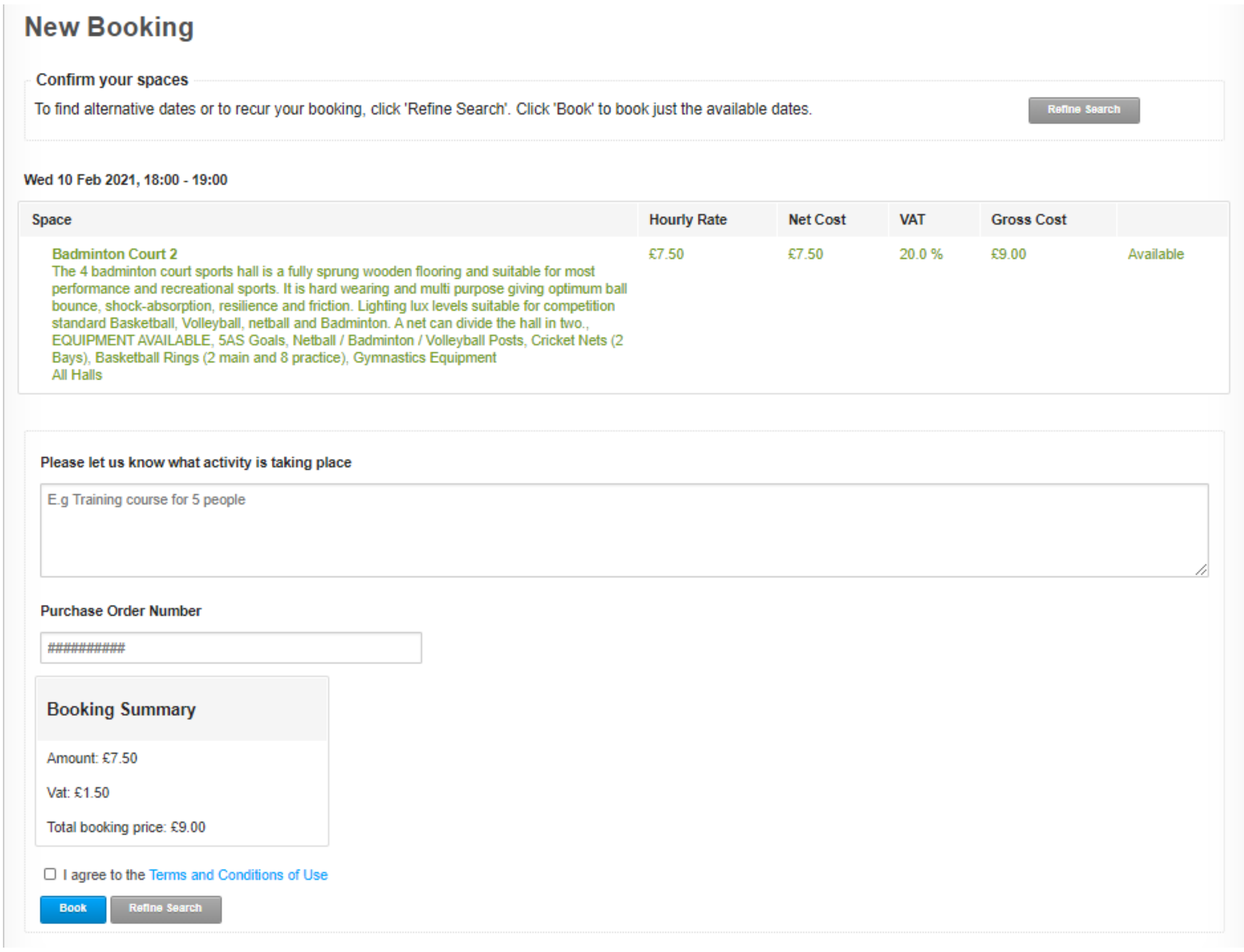
To view room information, click on the room name (in blue) to the left of the calendar view.



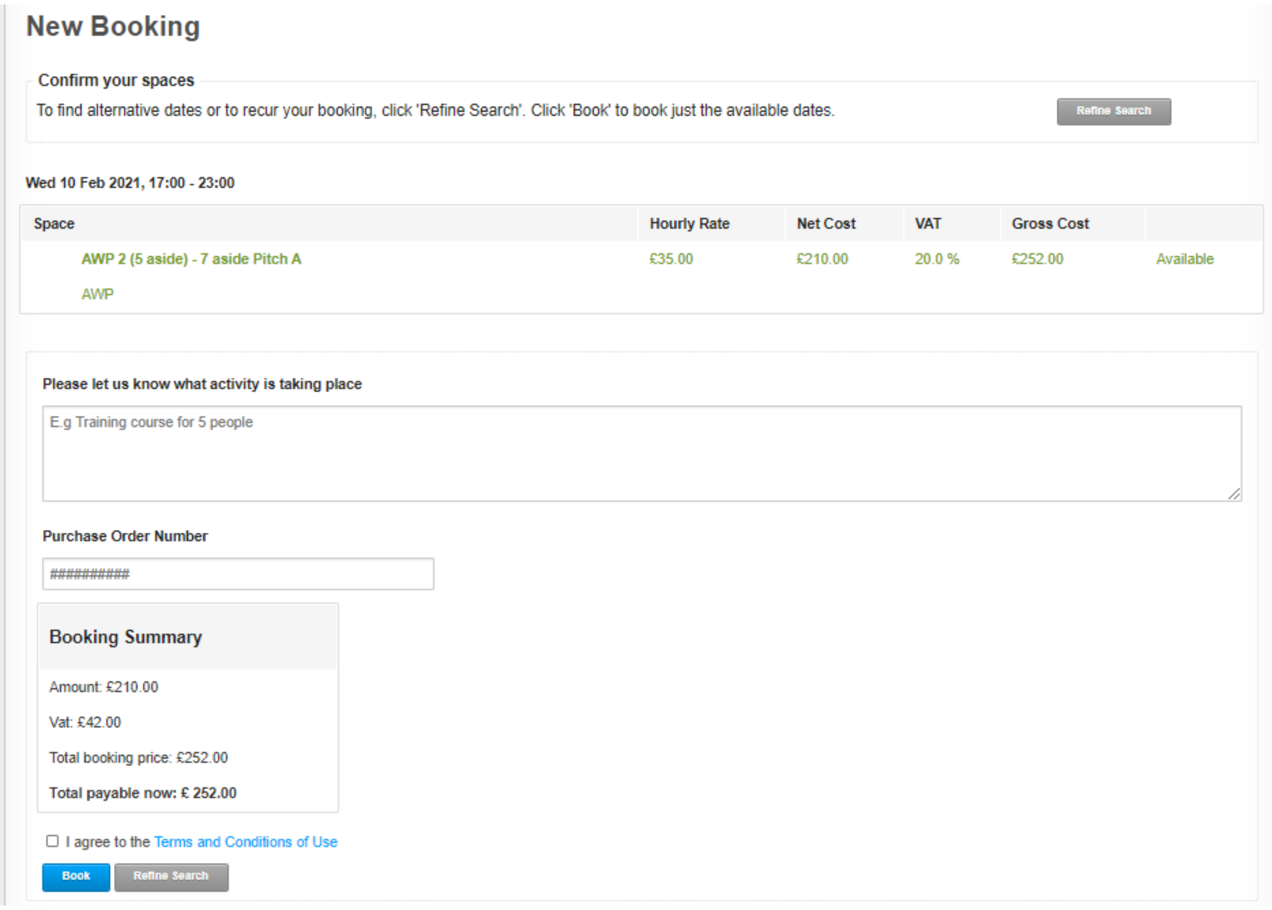
If the room has a * after the name it means that it is a 'slotted space', where availability is restricted to a block, rather than being able to select the start and end time. The Slots that are set up against that venue will show at the top of the calendar table:



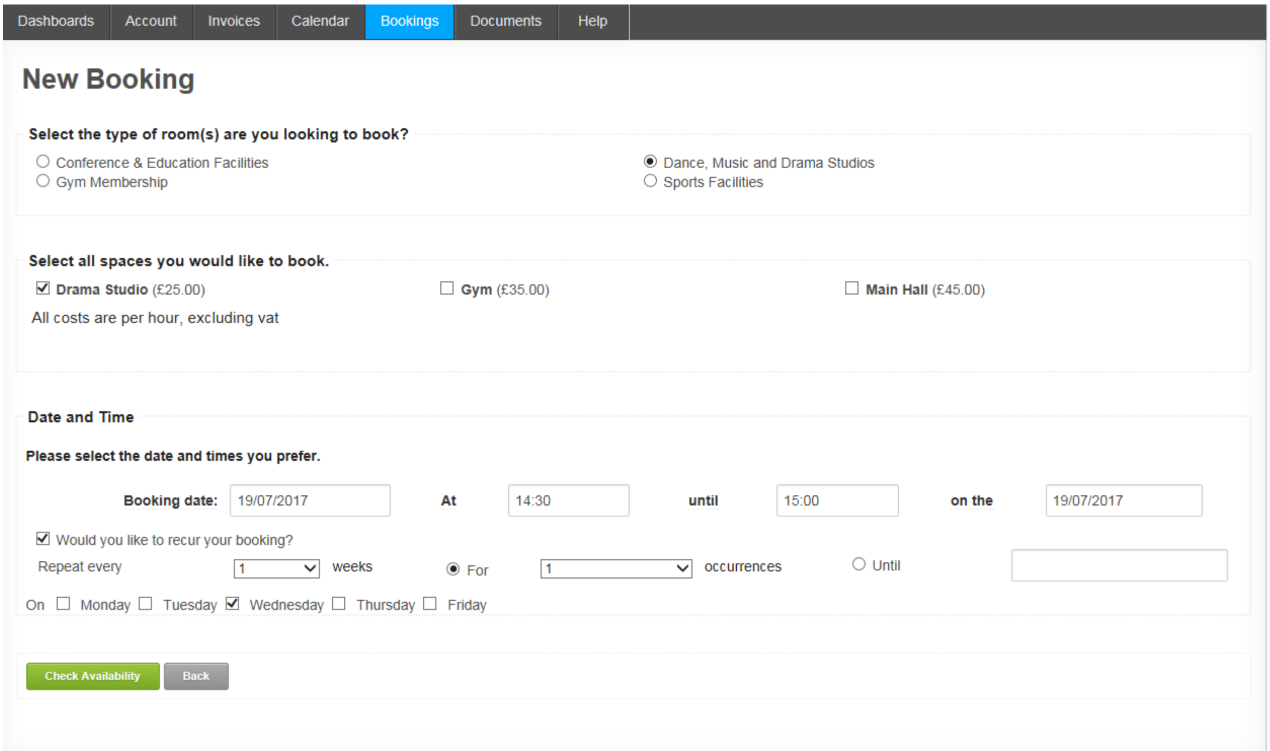
To make a new booking, click and drag on the time you require against the room name. This will take you to a page to see the Booking Summary, and give you the option to either **Book** to create the booking for one date, or **Refine Search** to add additional occurrences.



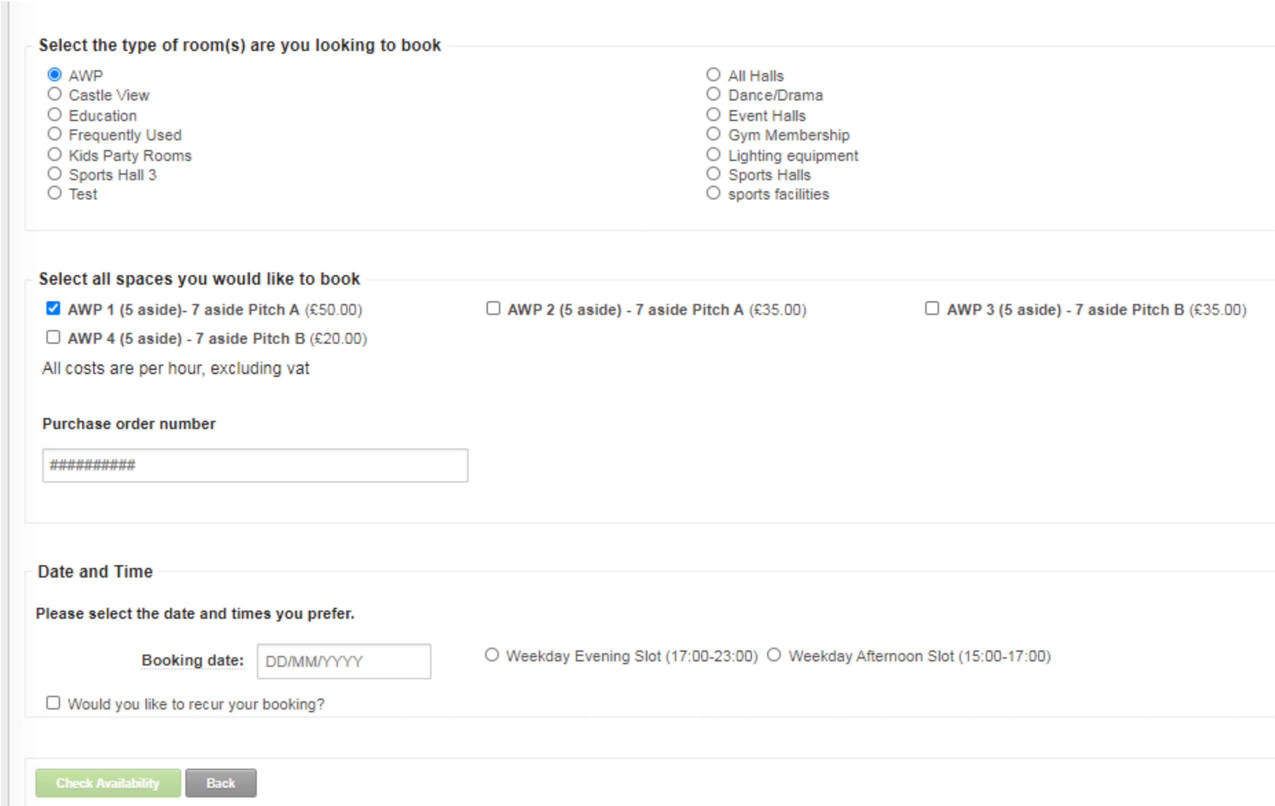
If you select a slotted room, it will default to the slot that covers the time frame you selected:



If you would like to make it a recurring booking, click the **Refine Search** button. The screen will be pre-filled with previous selections, simply select the recurrences required and click ‘Check availability’. The full selection of dates will be shown, any dates in green are available, red indicates unavailable. If dates are unavailable you can click **Refine search** again, select another suitable space and check availability again.



Slotted rooms will show the available blocks here, rather than a start and end time:



Once you are happy with all of the dates shown, scroll to the bottom of the page to enter a short description of the activity taking place, enter a Purchase Order (if required), tick to agree to the Terms and Conditions and click **Book**.

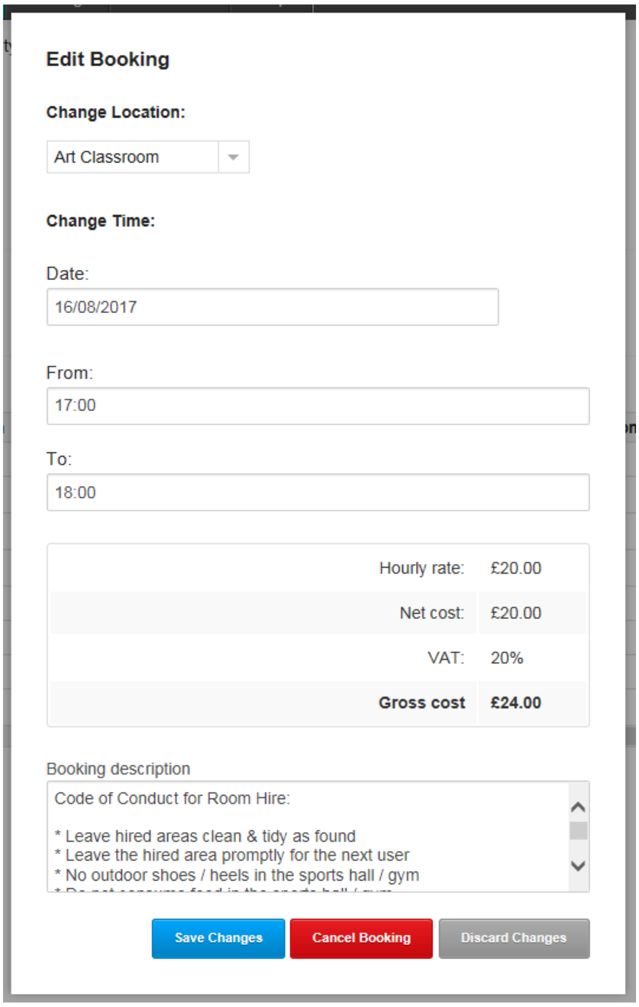
Once the booking has been made, you'll receive a confirmation email and the venue will arrange an invoice for the booking.

All your bookings can be viewed via the 'Bookings' tab. All your invoices can be viewed via the 'Invoices' tab.

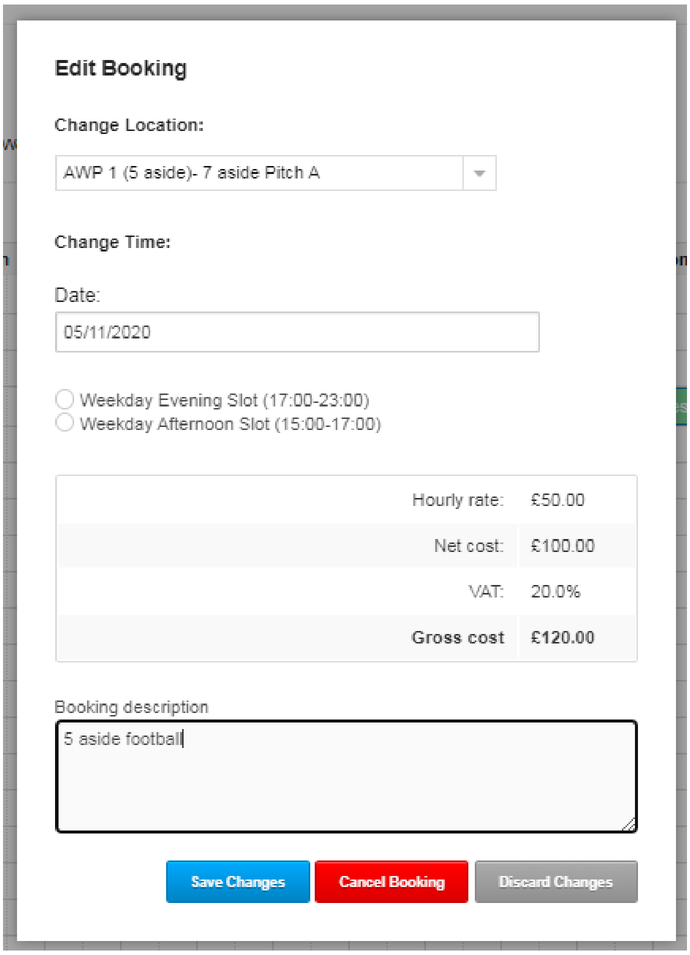
4. Edit or cancel existing bookings

To edit a **single** booking, locate the booking from the 'Calendar' tab. Click the booking and amend the space and time, on the pop-up form.

From the calendar page, you're also able to drag and drop your booking into another room and drag to change the times. Both of these actions will create the pop-up to confirm your changes:

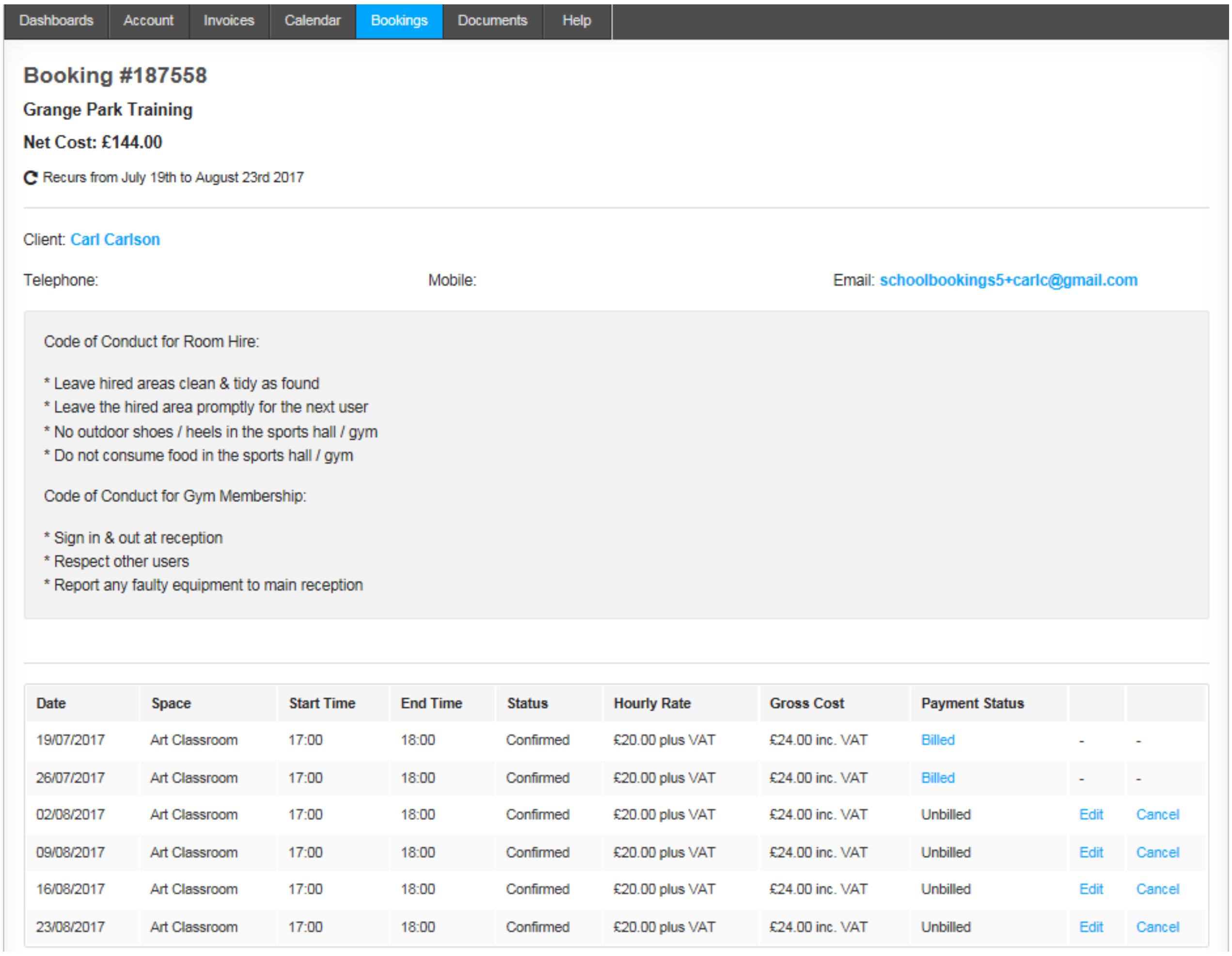


For Slotted rooms, again the start and end time will be replaced by all slots set up for that date:



To edit a **recurring** booking, click on the bookings tab. From the detailed view, you can use the filters to locate your booking. Alternatively, switch to the summary view to see a high level list of your bookings.

From the booking form (shown below), you'll be able to edit each line item as required. Cancellations can be made from the same screen.



Dashboards | Account | Invoices | Calendar | Bookings | Documents | Help

Booking #187558

Grange Park Training

Net Cost: £144.00

Recurs from July 19th to August 23rd 2017

Client: Carl Carlson

Telephone: Mobile: Email: schoolbookings5+carlc@gmail.com

Code of Conduct for Room Hire:

* Leave hired areas clean & tidy as found
* Leave the hired area promptly for the next user
* No outdoor shoes / heels in the sports hall / gym
* Do not consume food in the sports hall / gym

Code of Conduct for Gym Membership:

* Sign in & out at reception
* Respect other users
* Report any faulty equipment to main reception

Date	Space	Start Time	End Time	Status	Hourly Rate	Gross Cost	Payment Status		
19/07/2017	Art Classroom	17:00	18:00	Confirmed	£20.00 plus VAT	£24.00 inc. VAT	Billed	-	-
26/07/2017	Art Classroom	17:00	18:00	Confirmed	£20.00 plus VAT	£24.00 inc. VAT	Billed	-	-
02/08/2017	Art Classroom	17:00	18:00	Confirmed	£20.00 plus VAT	£24.00 inc. VAT	Unbilled	Edit	Cancel
09/08/2017	Art Classroom	17:00	18:00	Confirmed	£20.00 plus VAT	£24.00 inc. VAT	Unbilled	Edit	Cancel
16/08/2017	Art Classroom	17:00	18:00	Confirmed	£20.00 plus VAT	£24.00 inc. VAT	Unbilled	Edit	Cancel
23/08/2017	Art Classroom	17:00	18:00	Confirmed	£20.00 plus VAT	£24.00 inc. VAT	Unbilled	Edit	Cancel

Please note: you'll be unable to cancel if your booking is in the past or less than 48 hours away.

Should you wish to cancel multiple booking lines, or the entire booking, contact the administration team for that venue and they can make those changes for you.

If on the 'Check Availability' page you are given a total payable now, and once you click to create your booking it is showing as Tentative; then your venue will have set up **Instant Payment**. This means you will be required to pay for this and past calendar months, before securing your bookings. View our Knowledge Owl here for further information on this.

Marketing

Last Modified on 09/11/2016 3:06 pm GMT

BookingsPlus is designed to promote your facilities, using your website as your shop window. This means you can reach out to your local community & beyond, ensuring that everyone can see what you've got on offer.

Our in-house marketing team have created guides on link-building & website optimisation (SEO) to help you make the most of your website. None of these ideas will cost you any money, just a little time initially.

If you do need any additional support with marketing, our team are happy to discuss your requirements and give you a quote. Just give us a call.

Please see menu on left hand side for articles within this section.

Online link building & SEO

Last Modified on 18/02/2022 11:55 am GMT

Using our in-house expertise, we've developed this guide to marketing your facilities & increasing your visibility on the web. These are all free options, making the most of community & sports listing sites. All it takes is a little time to complete & verify the listings.

1. Register on Google Places - https://www.google.co.uk/business

Most people search online or 'Google' for information or a specific service. Registering with Google places ensures that your business can be found on Google.com & Google maps. This is a link to a YouTube video which takes you through the importance of getting listed on Google Places. https://www.youtube.com/watch?v=YIEnHZoqCCk

Remember: Get your customers to leave you a review on your listing. When you email them, include the link to your Places listing. The more reviews, the more that Google will take you seriously.

2. Natural editorial website links

Set up a link to your BookingsPlus lettings website within the editorial of other sites e.g. your own school website or local authority. Also linking your lettings website from your clients websites. A reciprocal arrangement could then be in place on your website using the BookingsPlus What's On or Adverts feature to publicise their events held at your venue.

3. Set up Social Media platforms for your venue

Publicise your venue to your local community with social media platforms. You can use these to infiltrate local events pages to get your venue noticed. This will help to garner new business online & help build a community for your hirers.

Facebook pages - https://www.facebook.com/business/pages

Twitter - https://help.twitter.com/en/using-twitter/create-twitter-account

Pinterest - https://help.pinterest.com/en-gb/article/get-a-pinterest-account

Instagram - https://help.instagram.com/155940534568753

LinkedIn - https://www.linkedin.com/help/linkedin/answer/112133/how-do-i-create-a-good-linkedin-profile-?lang=en

Like or follow our Social Media pages:

We will like or follow you back and help share your venue's updates to our online community.

Facebook:

https://www.facebook.com/BookingsPlus - online lettings software

https://www.facebook.com/BookingsGuru/ - our lettings admin & marketing service

Twitter:

https://twitter.com/BookingsPlus

https://twitter.com/Bookings_Guru

4. Link building with local directory & listing sites

For search engines 'Links' (your website address appearing on other websites) are like streets between pages. They're not everything, but the latest thoughts from SEO companies are that a large portion of the engines' algorithms are linked to these factors.

Listed below are the most common listing sites that we use:

http://cylex-uk.co.uk - Local listing search

- Hall hire listings directory

http://hallshire.com - Hall hire listings directory

https://www.thomsonlocal.com/ - Thomson local online

http://yell.com - Yellow Pages online

https://www.192.com/ - Business directory listings

https://www.schoolandcollegelistings.com/ - Find local schools & colleges

https://uk.locale.online/ - Location & event listings

https://www.scoot.co.uk/ - Business finder

Additional local free directories where listings can be made can be sourced by putting in a search engine:

'Business Listings.... (area where you are)'

'Free Listings....'

'What's On.....'

'Community Listings......'

Tip: Keep usernames and passwords the same for each listing & store them safely. With many of the sites you will receive a verification email before your listing is live.

5. Update your BookingsPlus lettings website

We would also stress the importance of keeping your website up to date. If a member of the public sees an advert on the website for last Christmas they will understandably assume the rest of the information may not be up to date or accurate as well. Fresh new content will also help get your website further up Google's rankings and ensure more search results include your venue. A great way to do this is with a Blog - on our website templates you can add a Blog tab and post regular updates to your community.

Another way to get your Website to the top of Google is using your Meta Data. You will notice these in your Edit Website section via the Manage tab. This pulls in key words that potential clients may type into Google and help them to find your Homepage. When we create your venue for you these will be prefilled but they can be tweaked by yourselves as needed.

See our separate article on Website Optimisation

If you do need any additional support with marketing, our team are happy to discuss your requirements. Just give us a call.

Website optimisation

Last Modified on 18/02/2022 11:54 am GMT

Once your website is live, there's a number of ways to keep it high up the Google searches & ensure it is working efficiently for you. Our in-house guide on website optimisation is below.

1. About search engine optimisation

Google ranks sites based on its internal mechanism to determine a site's importance. Google scans each site every now and automatically and calls this 'indexing'. Other search engines also perform this task in a similar way but for the purpose of this document we will be discussing Google.

The primary way of driving up a website's ranking is based on other sites linked to yours. How 'important' the other site is that links to your site will dictate the importance of your site on Google.

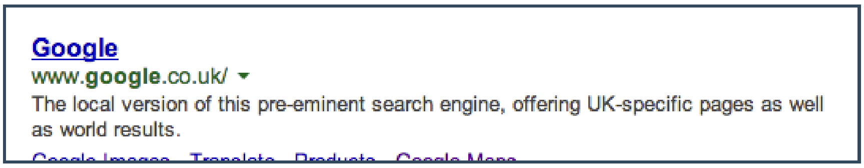
E.g. if your local newspaper's website has a good ranking on Google and they have a link to your website, Google will in turn raise the importance of your website and therefore its ranking on search results.

Other factors will dictate if Google will or will not boost your site's rankings. This includes making sure the HTML or code of the site is laid out correctly as well as relevant keywords being included in the text.

The final ranking mechanisms are down to Google but is is down to the website to ensure it follows the best practices to ensure you achieve the maximum page views and in turn conversions to sales.

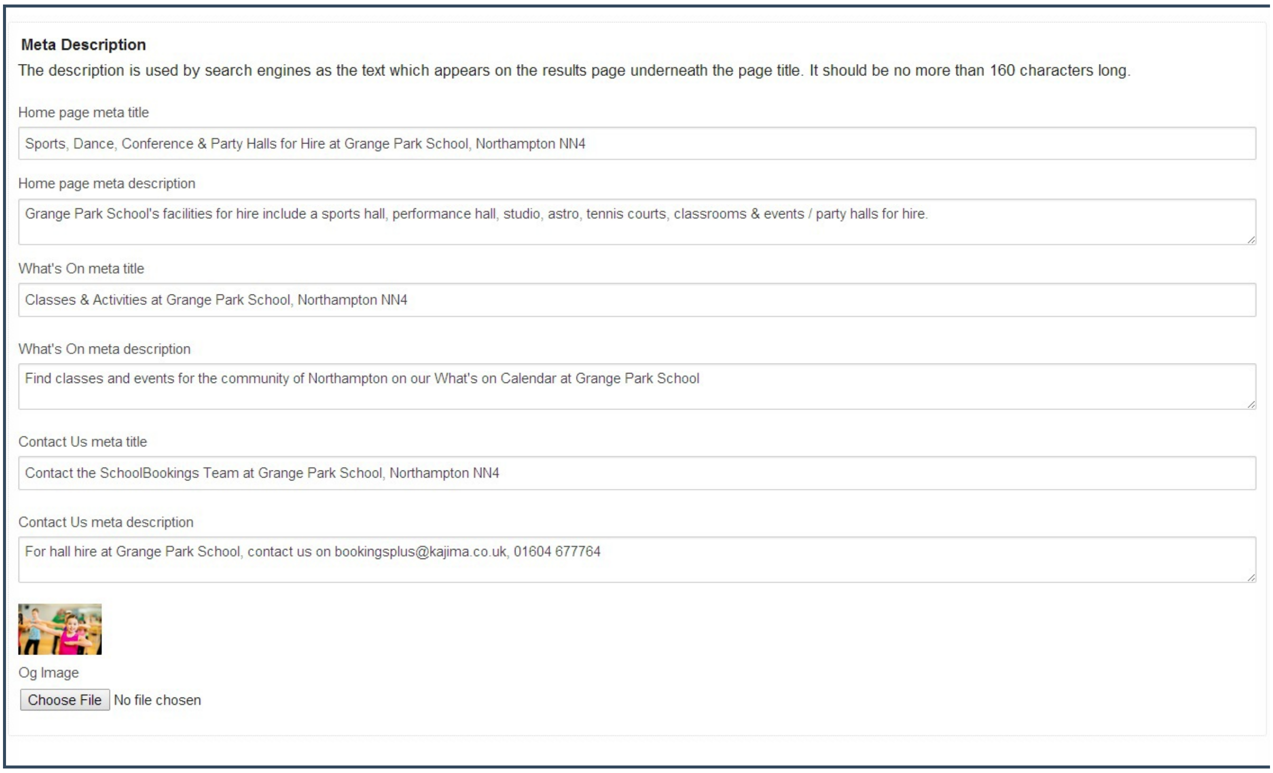
2. Implement titles and descriptions

It is important that each page of your site has a unique 'title' and 'description'. both of these are invisible 'meta' sections of content, but in turn are what comes up in Google search results. The 'title' is in blue followed by the site's Url in green followed by the 'description' in black (screenshot below of Google's own title, Url and description):



You can modify the title and description of your own Meta data by navigating to the Edit Venue page via the Manage tab. Below is an example of Meta data filled out for our fictional demo venue, Grange Park School. To increase keyword based search, include all the content terms you would like e.g. 'book badminton courts' using correct grammar as you would in a normal sentence. Avoid as much as possible comma separating lists of keywords that do not make grammatical sense. A length of 20 words for the title and 50 for the description is good practice.

Example of meta titles and descriptions filled in on the website template:



3. Inner content in your website

Google utilises all the headings, text and other content on each of your web pages to pick out optimum keywords. BookingsPlus is built to automatically lay out the text in the best possible location and format for search engine optimisation.

You can edit the 'headline' field which is the main title on the landing page for your website. You will find this by navigating to the 'Edit Website' page via the Manage tab and then editing the 'Homepage Pitch' within the 'Home page' tab. You can load the content with text containing relevant keywords that users may search for when in Google.

4. Link building

Once the site is configured, it is down to link building to really optimise the rankings of your website within Google. To achieve the best results, attempt to have the main school website and any other local websites link directly to your BookingsPlus site. The more sites linking to you, the greater Google will advance your site within its algorithm.

You can achieve this by liaising with your local community content providers, such as news organisations and other locations that may be relevant to your BookingsPlus website.

See our separate article on Link Building

5. Extra information for social networks

When users 'share' a link on Twitter, Facebook and other social media, these networks scan the meta data of a site and utilise that to select the descriptive information that automatically comes up in the link. This includes the title, description and also a link to your BookingsPlus lettings website.

Banners

Last Modified on 18/02/2022 12:18 pm GMT

Got a fence? Get a banner!

Banners are a great way of reaching out to your local community. They are eye-catching & low cost.

Below is an example of a banner. Your logo, school name and contact details should appear prominently as below.

The colours should suit your school colours.

These banners tend to be available in 2 sizes:

12ft x 4ft

15ft x 5ft

We are able to secure some quotes for the above. Please contact us for more details.

Best Practice & Tips

Last Modified on 27/06/2019 3:06 pm BST

BookingsPlus is constantly evolving!

When we release new functionality, a green banner will appear to let you know. Where appropriate, we'll add more detailed articles here so you can fully understand how the new updates work.

We'll also use this section to offer advice on managing your school lettings, ensuring they are as streamlined as possible. From our offices, we manage the administration & marketing of 35 schools across the UK, so we've got a vested interest in making the system as efficient as possible.

We really do value our customers feedback, so if you have any suggestions for improvements to BookingsPlus, please do get in touch via our helpdesk.

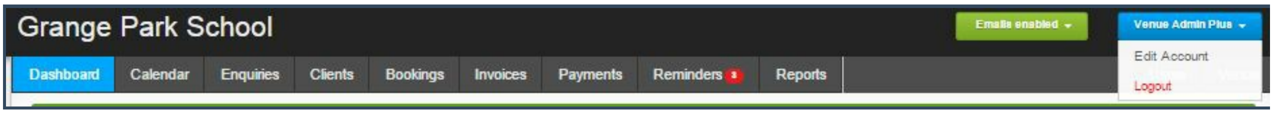
Please see menu on left hand side for articles.

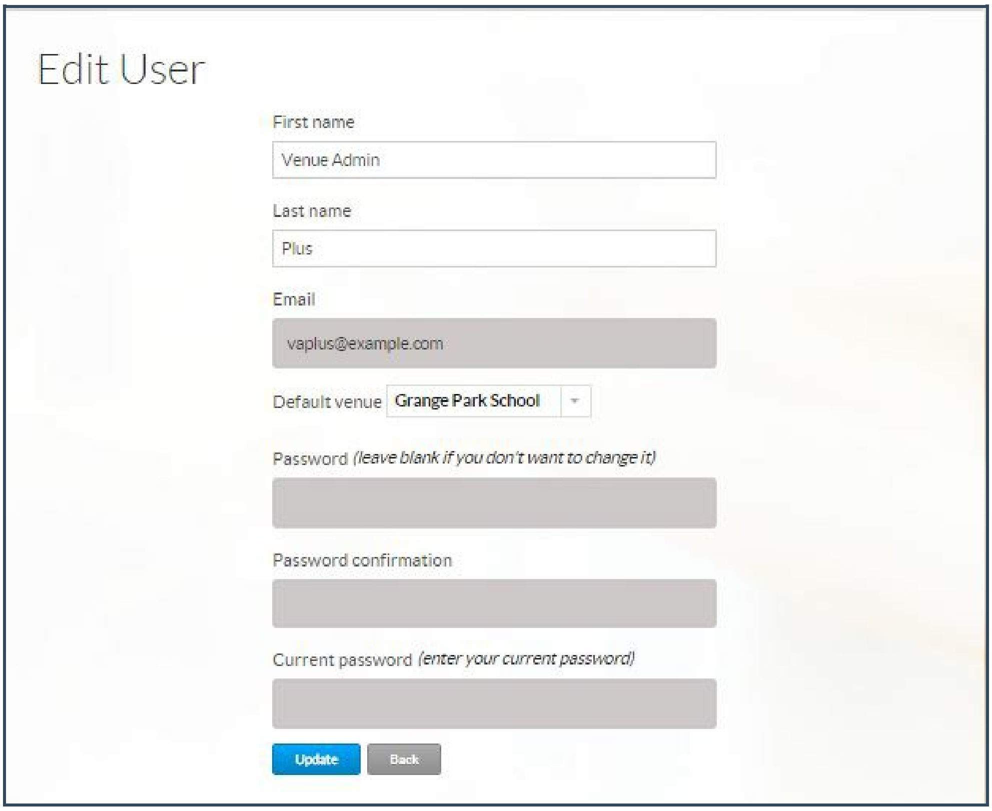
Change your BookingsPlus password

Last Modified on 03/02/2021 6:47 pm GMT

It's quick & easy to change your password within BookingsPlus.

Just log-in using your existing details. Once logged in, click on the blue button in the top right hand side with your name & select Edit Account.





Amend your password, confirm your new password & also enter your current password. Once you click  the changes will take place.

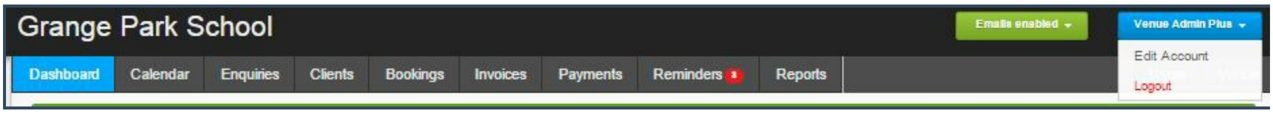
You can also change your default venue from this screen. Useful if you have are managing the lettings for more than one venue.

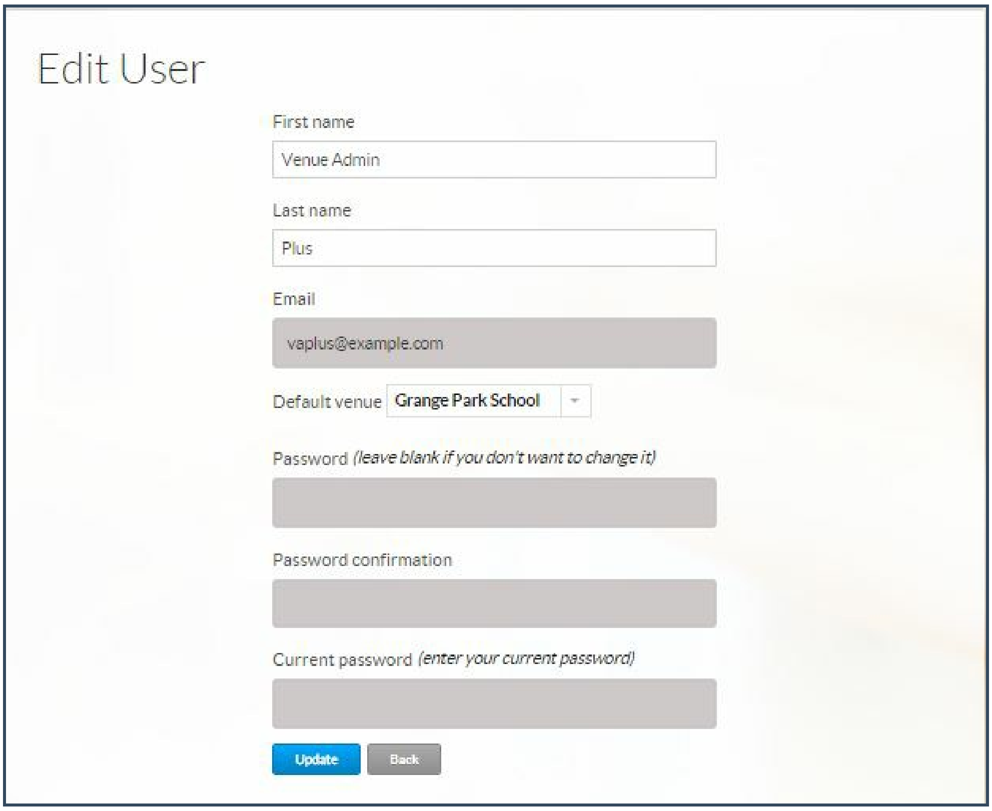
Changing your default venue

Last Modified on 03/02/2021 6:47 pm GMT

BookingsPlus will select one venue as your 'default' venue. If you wish to change this, it's straightforward.

Just log-in using your existing details. Once logged in, click on the blue button in the top right hand side with your name & select Edit Account.





Click on the 'Default Venue' drop down box. This will list all the venues you have permission to view. Select the required school & input your password in the Current password field.

Once you click 

the changes will take place.

Invoicing tips

Last Modified on 03/02/2021 6:47 pm GMT

Managing your lettings

Last Modified on 03/02/2021 6:48 pm GMT

BookingsPlus is designed to make managing your lettings a stress-free process!

To help with this we recommend that you renew your lettings on an annual basis. We find that Sept-Aug works really well, allowing you to renew the bookings during June/July. There are a number of benefits to annual bookings:-

- less administration for yourselves (compared to renewing every 10 weeks or termly)

- security for your hirers that their space is reserved (no additional commitment on their side, just your normal cancellation terms)

- easy to see availability for new enquiries

To make light work of the renewals, be sure to use the 

option (select to edit the original booking). This will replicate the previous booking & all you will need to do is amend the dates for the coming year (& your prices if you are increasing).

BookingsPlus can hold documentation for your clients e.g. Public Liability Insurance, coaching certificates etc. Make sure you use the reminders function to keep track of all the expiry dates of these documents.

Using BookingsPlus to manage your office space

Last Modified on 03/02/2021 6:53 pm GMT

BookingsPlus can do much more than just manage public room lettings. It can be used to manage the hiring of equipment, internal use of your facilities and as this article explains, BookingsPlus is perfect for managing your staff use of your offices desk space.

Using BookingsPlus in this way will help to control the number of people using the office at any one time, ensure staff know what desks are available to use and help manage the cleaning of desks after use. Best of all, you can integrate this use into your existing booking system so whether your venue has 5 or 50 bookable spaces already setup, you can add as many more as you require to accommodate each desk and staff member who will be using this feature. There is no additional cost to your organisation to use BookingsPlus to manage your desk space. All advice in this article will ensure your bookings are setup for 'free'.

Get started by following the 4 simple steps below.

Please note: To setup and configure the features discussed in this article you must have the 'Master Venue Admin' or 'Venue Admin Plus user role.

1. Calendar Categories

Using the calendar categories feature allows you to organise and filter your desks separately to the rest of your bookable spaces. If you have a single office space, you can create a category called 'Office' which you will assign each desk to. If you have multiple rooms or partitions within your office space, you can create as many additional calendar categories as you need.

This step is optional but highly recommended as it will make it quick and easy to find your desks, check who is already using them and assign staff to unused desks all within your calendar view.

- **Learn how to create and use Calendar Categories here.**

2. Create Bookable Spaces to use as desks

This is the most important part of using BookingsPlus to manage your office space as it will enable you to assign individual staff members to each desk. You can create as many bookable spaces for desks you have available within your office.

When creating bookable spaces to use for this purpose there are a few options to consider;

Space Name	Use a name which makes it easy to identify the desks position within your office. If it is a desk used by a specific colleague, name it accordingly i.e. Julie's Desk.
Price	Set each pricing option to £0. This will ensure staff members are not charged for use of a desk. Bookings without a cost are automatically exempt from invoicing.
Notes	Notes are useful particularly if you allow 'hot desking' as you can list the equipment available to use at each desk. You may also use notes to offer a more descriptive way of identifying a desks position within the office i.e. Located directly underneath large window.
Calendar Categories	Assign your desk to the calendar category you have created for it. This ensures the desk is visible when filtering by category within your calendar.
Photographs	Adding at least one photograph of the desk provides a visual way to identify its position within your office.
Space Business Hours	By default the business hours option will follow the instructions set at venue level. You can however adjust the times for individual desks which is useful if a particular office space is locked up at a different time to other parts of your building. Staff members will be unable to book a desk outside of the set business hours.

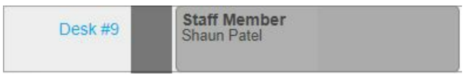
- **Learn how to create new bookable spaces here.**

3. Adding staff members

Use the Clients feature within BookingsPlus to create new user accounts for each staff member. This will enable you to assign individuals to each desk, track their usage and provides your staff with a platform to login and manage their own account.

ID	Flag	Client Name	Bookings	Last Booking
#77027		David Stubbs	1	31/12/2020
#77028		Saron Solomon	0	
#77029		Chris Smith	0	
#77030		Amberley Kent	1	31/12/2020

Please note: If your staff members are already setup as administrators or site staff within the platform, please do NOT create new client accounts for them using the same email address they already log into BookingsPlus with. You can either set them up as 'Client' users using an alternative email address or instead create a single 'Staff Member' user. Notes can be used when allocating this user to a desk to identify the staff member using it.

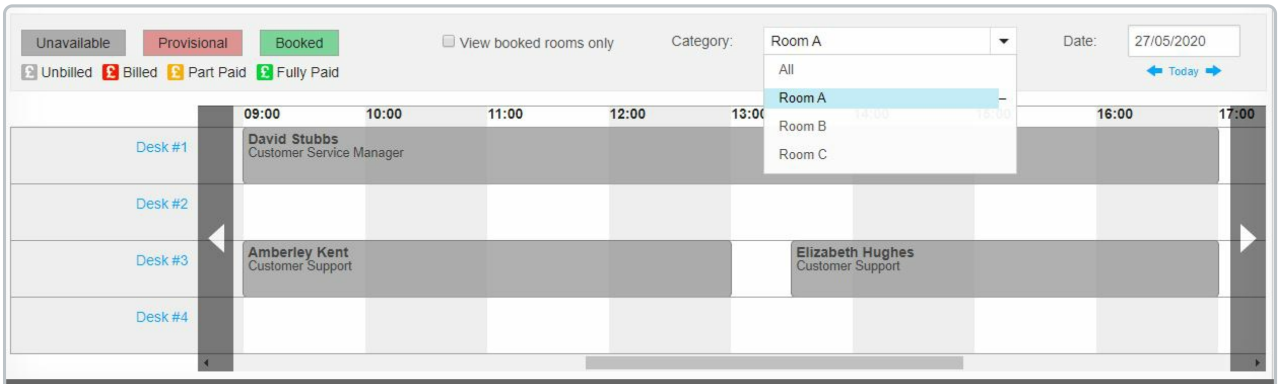


When adding new staff members it is important to select the 'Non-Billable client' option as this will add another layer to ensure the user is exempt from invoicing and not charged to use the desk.

- **Learn how to add your staff members here.**

4. Allocating staff members to desks

The final step involves using the booking feature to allocate staff to different desks. Doing this within your calendar view gives you visibility regarding who and how many desks are in use at any one time. If you are limiting your office space to a certain number of staff at any one time or wish to take measures to ensure you don't have people sitting directly next to each other, the calendar view makes doing this straightforward.



The grey colour of each booking shows they are internal use and not subject to invoicing or payment

- **Learn how to use your calendar to create desk bookings**

Watch the video introduction below to see a working example:

Advanced Advice

Enable staff to check availability and book a desk themselves

BookingsPlus provides a 'self-service booking' feature which allows you to select specify client users who can book themselves into a space. There is customisation within this feature, for example; you can lock the functionality to specific spaces meaning you could allow staff members to book themselves onto a desk but limit their ability to book other parts of your premises such as meeting rooms, sports hall or pitches.

To find out whether your booking system currently has access to the self-service booking feature, please contact bookingsplus@kajima.co.uk quoting the name of your venue. Our team will check and provide you with further advice on how to setup and configure self-service bookings in a way which works for your requirements.

Please note: By opting for self-service bookings, you lose the ability to control how many staff members book a desk at any one time and also the desks they book. If limiting the number of staff using a room and ensuring they remain adequately distanced is an important factor for your organisation, you may wish to not use this feature and instead control usage at administrator level.

Give your cleaners access

By also setting up your cleaners as 'Client' users, you can allocate them to desks to be cleaned after a staff member has finished using it. Your cleaners can log into their own account to see when and where they are required to clean. They will also be able to see how many desks are in use at any one time to help ensure your social distancing guidelines are adhered to. (COVID-19 specific issue).

The renewals process

Last Modified on 03/02/2021 10:11 am GMT

If you have annual bookings we would recommend booking these in to all start and finish around the same time. We would suggest either academic year or calendar year.

We follow this process in our Northampton BookingsGuru office and have found it to be very beneficial in streamlining our administration processes and improving our clients experience as well as the following benefits:

- Once a year process
- Opportunity to implement a price increase.
- Clear indication of availability as all your current clients bookings are in the system
- Ensure all customers have their documents up to date
- Income can be projected for the full year

The basic steps are as follows:

- Print current bookings
- Consider price increase:
    - For Individuals or
    - General Percentage increase
- Put provisional bookings in
- Send provisional notifications with amended information
- Follow up to ensure everyone has confirmed (use Bookings Value Report to identify provisional bookings) and provided the necessary information.

The process:

It is advisable to email all clients first to inform them that renewals are being created, make them aware of any price increases, any deadlines required for confirming their provisional bookings and any other updates you may have. This also prompts them to let you know if they do not want to continue with their bookings.

Firstly, decide if you would like a percentage price increase across the venue as a whole or just an increase for certain bookings and/or spaces.

Then identify which clients have annual bookings that need to be renewed – an easy way to do this would be via the [**Bookings**] tab, [**Dashboard**] or by looking at that central 'Last Booking' column on the [**Clients**] tab.

Check all clients have all documents required. Check all current documents and add reminders to ensure when they do expire you are notified 2-3 weeks prior in order to email the client and get them to send you the new document.

Creating the booking:

As a time saving option, a ‘Renew booking’ button has been created exactly for this process. This is located within the existing booking, click edit, then scroll to the bottom of the page, it is on the right hand side.

For full details on this process, see our 'Renewing a Booking' guide here.

Provisional emails:

While doing this process, it is a good idea to temporarily amend the text on your automated Provisional Email template to ensure that customers are aware of the renewals process and any additional requirements. If you are doing your renewals as a bulk job, before sending the provisional emails you can put a few paragraphs of text into the Provisional template in the system to avoid having to email each customer individually. This can be found in the [Manage tab], click edit venue, Emails, and scroll down to **'Provisional bookings Email'.** Cut out the first paragraph and paste it somewhere safe, then insert the below:

Please see sample text below:

'We are currently renewing all bookings for the period 1st September 20XX to 31st August 20XX and have reserved a PROVISIONAL booking for you. There has been a small price increase so your price has been adjusted, please login to your account and double check that we have reserved the correct dates and times for you and to view your new pricing. There will be a separate booking for each day that you book with us (if applicable). Please click the green 'Confirm' button on each booking form to accept the booking. If you have any amendments to make, please let us know by email as soon as possible, and we can action that for you.

Please be reassured that even once you have confirmed your booking we are able to make any amendments and cancellations without charge providing 7 days’ notice is given.

We kindly ask that you confirm your bookings for next season by XX/XX/XXXX. Please note that your booking is not secure until we have received confirmation. After this date, we will assume that you no longer require your booking. Please do not hesitate to ring us if you need to amend or double check anything.

Please be aware that we will not know any dates that the school require use of the facilities in the evenings (for parents evenings etc.) until they start back in the new term. We will write to you as soon as possible to advise if any affect your bookings.'

Once this is done it is important to change the Provisional template back to the original paragraph.

Invoicing:

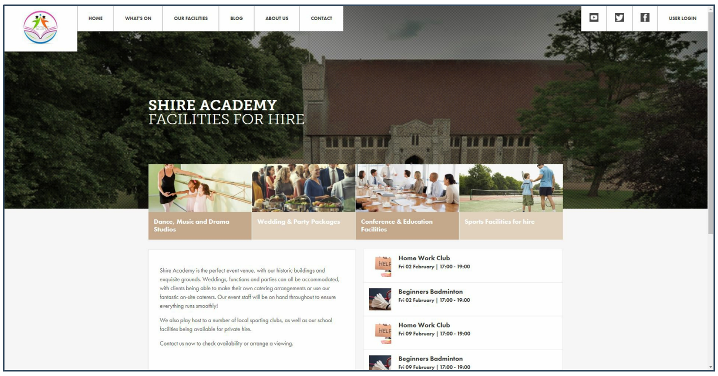
As you will be aware, you can only invoice confirmed bookings, therefore it is important to ensure all bookings are confirmed ahead of your invoicing date. The provisional bookings section on the Dashboard is ideal for monitoring this.

Switching to a new website template

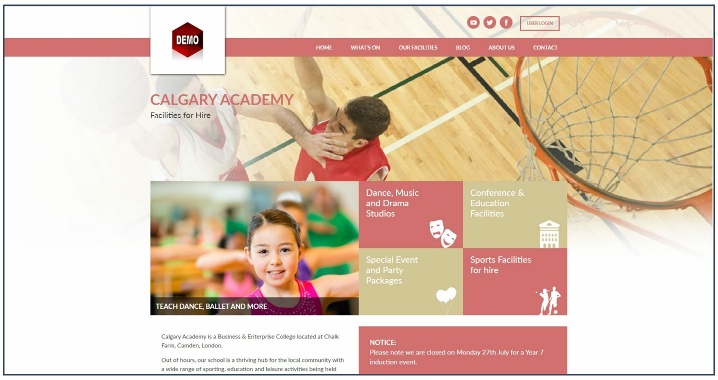
Last Modified on 03/02/2021 7:09 pm GMT

At BookingsPlus, we realise it's not a one size fits all scenario. To help with this, we've developed alternative website templates so you are able to choose which will work best for your venue.

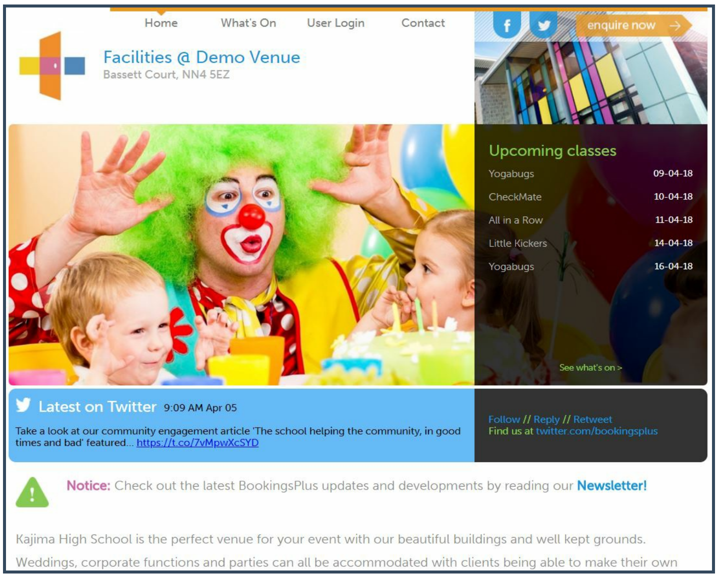
You have full control over the colour themes and pictures, as well as being able to turn various features on/off (e.g. What's On page, Blog etc). We've created sample websites to help you make your decision. Why not take a look? If you've been with us some time, you will be on the Classic template.



Vancouver - http://vancouver.schoolbookings.co.uk/



Calgary - http://calgary.schoolbookings.co.uk



Classic - http://classic.schoolbookings.co.uk

Here's some examples of live websites to show how our websites can be customised to complement your logo and branding.

Vancouver template - Bushey Academy - https://thebusheyarena.communitybookings.co.uk/

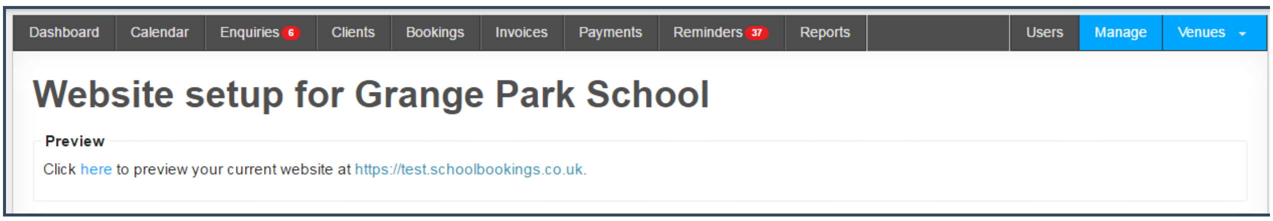
Calgary template - ISCA College of Media Arts - https://iscaexeter.schoolbookings.co.uk/

Classic template - Great Park Community Centre - https://gpcc.communitybookings.co.uk/

Once you've decided which website template suits you best, then contact us at the helpdesk and we will make the switch to the new template for you. You will need to add a few extra pictures and details, so do make sure you have some time spare.

Please consider these points before switching:-
Overall colour scheme for your website - do you want to tie in with your logo? If so, BookingsPlus uses hex colours & we can help identify the colour codes if needed
Pictures - the new templates are a great place to show off your venue! Do you have the perfect pictures for the home page banners? We can help if you send through full size original pictures.
What's On - this is an optional section - do you wish to publish your classes on your website?
Blog - this is an optional section, ideal for keeping people up to date on any exciting news, new bookings etc
About Us - this is an optional section - great to give your potential customers more information!

We recommend that you keep checking your updates as you go along - there's now a handy preview from your **[Manage]** tab



We advise that you keep your website live throughout this process, as it can have a detrimental effect on your Google presence if it is taken offline. With this in mind, do make sure that you allow enough time to fully complete the changes in a short time frame.

Specifications: To make your transition easier, the dimensions for the pictures on the templates are below:

Picture size guidelines (JPGs)

	Classic	Vancouver	Calgary
Scrolling Banners	1920 x 720	X	X
Background Banners	X	1150 x 650	1150 x 650
Category Pictures	1040 x 642	1040 x 642	1040 x 642
Website Spaces	1040 x 642	1040 x 642	1040 x 642
Logo (top left)	240 x 240	240 x 240	240 x 240
Venue Picture (top right)	320 x 165	X	X
Adverts	Images will resize to fit		
What's On booking pictures	Images will resize to fit		
About Us pictures	X	1024 X 768	1024 X 768
Facilities pictures	X	1024 X 768	1024 X 768
Classes placeholders	X	1024 X 768	1024 X 768

In most cases, pictures will resize to fit the space. However, this may mean that it will crop the image.

Automated invoicing

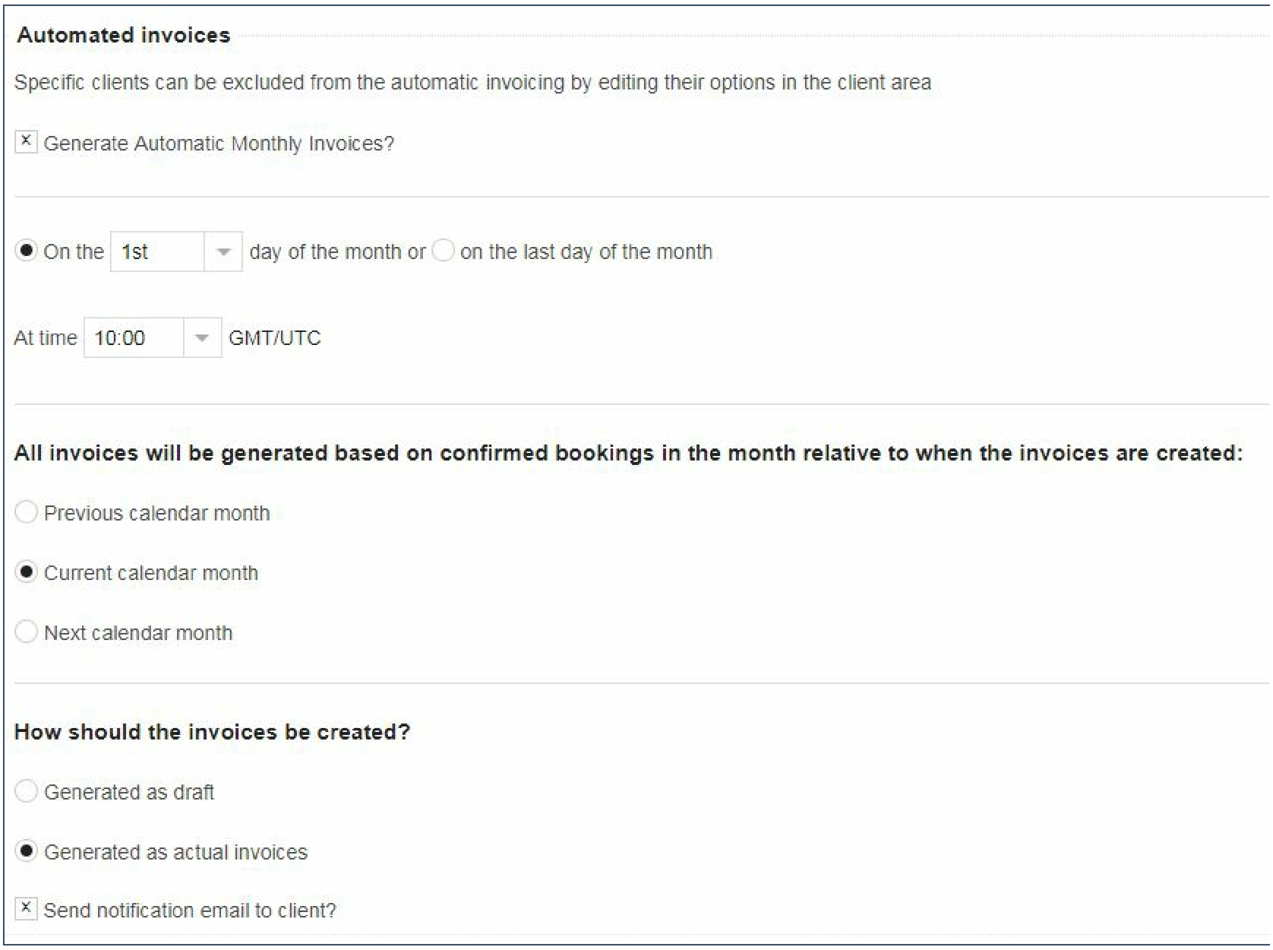
Last Modified on 03/02/2021 2:44 pm GMT

Automated Invoicing

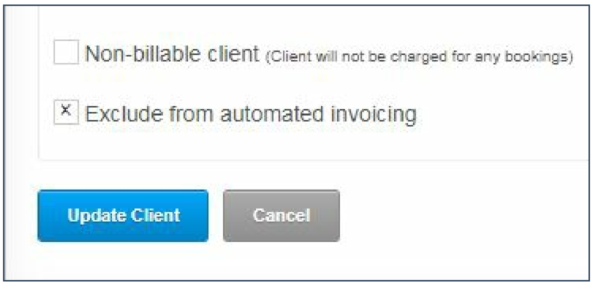
You can now do your invoicing, even when you are not sat at your desk!

Automated invoicing gives you the tools to generate your invoices at a set time, on a set day, for Previous, Current or Next calendar months. You then can decide if you would like these to be generated as a draft invoice, giving you the chance to review them before they are sent out to the client, or, you can have them generated as an actual invoice, with the option to send the client an email notification.

To use this feature, go to the **Manage** tab - Edit Venue - **Billing**, fill out the below settings and click Save .



Once this is set up, the option will appear to exclude certain clients from the monthly automated invoicing. You can do this from the **Clients** Tab - Edit Client link- and scroll to the very bottom of the page. You will then find the below option; tick to 'Exclude from automated invoicing' and click . Update Client



Once the invoices are run, if you have selected to have these sent out as actual (published) invoices these will now appear in the clients accounts, and they may also have an email to notify them if you have ticked this option.

If you have requested that these be generated as a draft, the Invoices tab will now have a red indicator showing the number of **DRAFT** invoices requiring action. 

These will need to be emailed out or to click 

if the client does not want an email notification, as before.

Going forward, automated invoicing will be developed further to give you the option of generating an invoice automatically for late bookings (those booked in after the scheduled invoicing).

Watch our video tutorial:

Information and FAQs on the 23rd August 2021 data security incident

Last Modified on 01/09/2021 10:34 am BST

Last updated: 31st August 2021

On 23rd August 2021, BookingsPlus was informed of a data vulnerability on one of our testing servers. This involves the risk of unauthorised access to customers' documents through bypassing our server security. In this instance no financial information or user login details, such as usernames or passwords, were made accessible as this information is not stored on the server.

We understand that this is a cause of concern and we have put together some FAQs to answer some of the questions you might have. You can also reach us on our dedicated phone number 01604 677764, or by emailing support@bookingsplus.co.uk.

What happened?

On Monday 23rd August 2021, we were informed that one of our testing servers had a vulnerability which allowed for potentially unauthorised access to customers' documents.

A unique URL (web address) is generated when a user uploads a document while making a booking through BookingsPlus. This means someone with knowledge of the exact, unique URL would be able to bypass the server security measures and assess the documents. However, these URLs have never been made public and consequently the chances of someone being able to discover them are very low.

As soon as we were made aware of this vulnerability, we acted immediately to increase the security on this server and to stop potential unauthorised access to any information.

We have reported the incident to the Information Commissioner's Office, the UK's data protection regulatory authority. Our data protection officer and technical team will work closely with the authority to provide updates and to implement further actions if required.

Is the incident ongoing?

No. We have identified the cause of the vulnerability and addressed it to make the data secure.

What data was accessible?

The documents uploaded by some of the hirers required for making bookings on BookingsPlus were accessible. Depending on the nature of the specific booking, these could include documents such as copies of DBS/CRB certificates, Insurance Documents, Risk Assessments, First Aid Certificates, Booking Request Forms, Music Licences, Invoices, Purchase Receipts, passports, driving licenses and similar documents. No financial or account related data was stored on this server.

Although these documents were made accessible via the unique URL, they are not accessible online in general or via search engines such as Google. In addition, no usernames, passwords or payment details were compromised.

We have contacted the hirers whose documents were subject to the risk of unauthorised access.

Are my financial details secure?

Yes, all your financial details are secure as there was no financial information stored on the server where the vulnerability was detected.

Our detailed investigation of the extent of the incident has now been completed and all vulnerabilities have been addressed.

Who has been affected?

The documents outlined above were accessible for some of our hirers who have used BookingsPlus in the past. We are doing everything we can to contact everyone affected to explain what has happened as soon as possible.

What should I do now?

Whilst the risk of the uploaded documents being widely circulated is very low, we would advise our users to be vigilant. It is possible that while the vulnerability existed on our server your documents may have been accessed by an unauthorised party who could use the information for malicious activities. Some of the ways you can help to keep your information safe are:

- Watch out for suspicious calls, texts or emails or messages on social media accounts. Do not click links within emails you do not recognise.
- Delete texts from numbers or names you do not know.
- Let us know if you receive any suspicious or unsolicited emails, in particular any that appear to come from BookingsPlus.

If you are suspicious about an email, call or letter that appears to come from BookingsPlus, please contact us straight away. You can reach us on our dedicated helpdesk phone number 01604 677764 or by emailing support@bookingsplus.co.uk. We are experiencing higher call volumes than normal, so if you can, please email rather than calling. We will get back to you as fast as we can.

What measures are you putting in place to stop something like this happening in the future?

We have reviewed the security of all our servers and implemented enhanced security policies as required. We have also reviewed our technical processes to ensure there are robust controls in place to prevent such incidents from happening in the future. In addition, our data protection officer and technical team will be committing a thorough review of the incident and have committed to conduct more regular data protection risk assessments and security inspections moving forward as well as a refresher training session for staff.

Who can I talk to about this?

We have set up a dedicated team to deal with any questions or concerns you may have. You can reach us by phone on 01604 677764 or by emailing support@bookingsplus.co.uk. We are here Monday to Friday 9am – 5.30pm (UK time) and we will do our best to deal with all your queries as quickly as possible.

Summer 2019 Newsletter

Last Modified on 03/02/2021 7:01 pm GMT

Click **here** to read our Summer 2019 Newsletter

Spring 2019 Newsletter

Last Modified on 03/02/2021 7:01 pm GMT

Click **here** **to read our Spring 2019 Newsletter**

What's on at your venue this Summer?

Last Modified on 03/02/2021 7:02 pm GMT

Promote your venue more efficiently with social media

Last Modified on 03/02/2021 7:02 pm GMT

Managing Your Website

Last Modified on 03/02/2021 7:03 pm GMT

Invoicing made easy with BookingsPlus

Last Modified on 03/02/2021 7:03 pm GMT

Your 3 key steps to mastering BookingsPlus

Last Modified on 03/02/2021 7:06 pm GMT

Have you reviewed your venue's terms and conditions recently?

Last Modified on 03/02/2021 7:06 pm GMT

Review your venue's holiday and closure dates

Last Modified on 03/02/2021 7:07 pm GMT

Understanding Your Calendar

Last Modified on 03/02/2021 7:07 pm GMT

Your Reporting Suite Awaits

Last Modified on 03/02/2021 7:07 pm GMT

Bug Fixes & New Feature Updates

Last Modified on 13/01/2025 5:29 pm GMT

Bug Fix release - 13/01/2025

No	Type	Issue/Feature	Solution
1	Bug Fix	The new login page lacks a "Reset Password" or "Forgot Password" option, making it impossible for users to recover their passwords.	Venue Admins with access to the Client User ID page will only see venue specific client details in line with GDPR guidelines
2	Bug Fix	No error messages are displayed when incorrect login credentials were entered, leading to user confusion	The date shown for any Stripe payments in the 'Paid Out' column now reflect when new payments are paid out by Stripe on the 'Payments Received and Refunded' report
3	Bug Fix	Selecting "Edit Account" from the user dashboard logged users out and caused an error page upon re-login due to a different root URL.	An email address used as an Admin user in the system cannot then be used as a Client user login

System Update - 19/09/2024

No	Type	Issue/Feature	Solution
1	Appearance	Log-in Screen	A new login page, updated to match the current BookingsPlus website
2	Appearance	Logo (Whole System)	A new BookingsPlus logo is now displayed across the application

Bug Fix release 11/11/2021

No	Type	Issue/Feature	Solution
1	Bug Fix	Client User details only visible to Admins at their respective venue	Venue Admins with access to the Client User ID page will only see venue specific client details in line with GDPR guidelines

2	Bug Fix	The date shown in the Stripe payments 'Paid Out' column on the 'Payments Received and Refunded' report is not accurate	The date shown for any Stripe payments in the 'Paid Out' column now reflect when new payments are paid out by Stripe on the 'Payments Received and Refunded' report
3	Bug Fix	Client users can be created using an existing Admin email address	An email address used as an Admin user in the system cannot then be used as a Client user login

Bug Fix release 15/09/2021

No	Type	Issue/Feature	Solution
1	Bug Fix	Incorrect 'welcome email' being sent to clients when clicking to resend from users page	Clients were previously receiving the Admin welcome email. Corrected to ensure the Client welcome email is sent instead
2	Bug Fix	New venues are not automatically added to scheduled reports when 'All Venues' is selected	Ensure that new venues are automatically included on existing reports when the 'All Venues' option is ticked
3	Bug Fix	Fix 'Payments Requiring Attention' - Not all Pending Payments are showing and some Failed Payments only displaying months after they have failed	Ensure that the correct Pending and Failed Payments are displayed on the Dashboard
4	Bug Fix	Amendments to Venue Groups when generating reports	Ensure that if Admin select a particular Venue Group on a Scheduled Report, then edit which venues are selected, the changes are saved and the report runs correctly
5	Bug Fix	GoCardless fees to come directly from GoCardless and ensure this includes VAT. Previously BookingsPlus calculated the fee based on the percentage charged	Payment fee data comes directly from GoCardless into BookingsPlus and displays on the Payments tab and within the 'Payments Received and Refunded' report. GoCardless doesn't send fee data until it is 'Paid Out' to the venue, BookingsPlus displays 'TBC' until it receives this data
6	Bug Fix [Internal]	Change recipient of Website activation emails	Website activation and deactivation alerts will now send to the BookingsPlus client services email address

7	Bug Fix [Internal]	Remove expired emails from hardcoded system memos and replace with Admin email address	Automated Invoice failure emails and verify client balance emails now go to Admin email address

Bug Fix release 12/07/2021

No	Type	Issue/Feature	Solution
1	Bug Fix	For self service clients, 'other' category option on booking form unnecessarily showing	Where all rooms marked available for self booking have an assigned category, Other option does not display
2	Bug Fix	500 error for administrators if clicking Back from Edit Account IF they have just generated a report	Landing page fixed
3	Bug Fix	Venue Setup Import categories displaying 404 error	Import categories option removed
4	Bug Fix	Client names in Client Dropdown not displaying in alphabetical order	Will now be back to sorting alphabetically
5	Bug Fix	If a whole Billed booking is cancelled, then those booking descriptions were vanishing from their Invoice	Ensure Booking descriptions are not deleted off the Invoice if the booking is deleted.
6	Bug Fix	If an Admin user creates a reminder and then the Admin is deleted, the reminder cannot be actioned	Ensure reminders created by deleted users can be actioned by other administrators
7	Bug Fix	Cases reported of client account names not displaying in Enquiry client dropdown	Ensure that the Client list pulls through correct to the Enquiry client dropdown
8	Bug Fix	Terms and Conditions checkbox not displaying on the Bookings form where clients have access to multiple venues	Clients should need to tick and accept Venue T's and C's when making a self service booking
9	Bug Fix	Where a new venue has no pre-saved clients, administrators were not able to save an Enquiry	Ensure that new enquiries can be saved at a venue with no pre-existing client accounts.
10	Bug Fix	Edit Website options to display or not display Kajima Terms and conditions and Privacy Policy not working	Removed options to choose to hide them.
11	Bug Fix	Custom Recurrence option on Enquiry form has no functionality	Custom option removed

12	Bug Fix	Users linked to Non-Billable and other client accounts, unable to switch the Non-Billable account	The Non billable client account will now display as a link within the account dropdown. Clicking this link takes the user to an Accounts landing page, that only displays the venue's terms and conditions.
13	Bug Fix	Site Staff plus's can create but then not action their own reminders	Site Staff plus's can now action or delete only their own reminders
14	Bug Fix	While GoCardless payments were in the Pending or Failed state, administrators were not able to remove them from their Invoice	On the payment pop-up administrators can now which invoice the payment is applied to and have the option to remove it.
15	Bug Fix	When the Client Contact email was not populated, Client Users were not receiving Welcome emails, Provisional emails, confirmation emails or Host emails.	Ensure that the emails are correctly received to the Client user, regardless of if the Contact email is populated
16	Bug Fix	When adding an existing user to the system and the email was containing a capital letter, the user was not linking correctly	If a user already exists on the system, and an administrator attempts to add the to a different client account or venue, but includes capital letters in the email, then the system will still recognise the email address and link the user to it.
17	Bug Fix	Security Alert fix	
18	Bug Fix	500 errors displaying when tentative bookings are created at a new venue	At brand new venues set up with Instant Pay, if a client confirms a Provisional booking/creates their own booking, the booking will display correctly
19	Bug Fix	If an administrator runs multiple reports 'One report per venue' the reports were arriving corrupted	Ensure that this scheduled report options is working correctly and the reports are viewable.
20	Bug Fix	Security Alert fix	
21	Bug Fix	Void date not populating on the Void Invoices report correctly where it is voided by the Instant pay expiry task.	If an invoice is Voided because it was not paid in time, the reason 'Instant payment not received within X' will now correctly display on the Void Invoices report

22	Bug Fix	Client users that have access to multiple client accounts, are not able to correctly upload documents to specific accounts	A client user can now correctly choose which account to upload a document to, by selecting them within their accounts dropdown. While uploading the document it now also clearly states which account this document uploads to.
23	Bug Fix	GDPR change to users tab	Ensure that administrators only have visibility of Client accounts at venue's that they manage within the users tab
24	Bug Fix	Reminders email sent to venue with incorrect link	Ensure that the reminders email links the administrator back to the correct venue
25	Bug Fix	Security Alert fix	
26	Bug Fix	Bookings that exist within 00:00 to 01:00 on the 1st day of the month during BST not picked up during invoice runs for the correct month	Ensure that the clocks changing does not prevent bookings from being correctly invoiced.
27	Bug Fix	If a Venue administrator updated their Edit Website tab, then the ticked Marketing options become de-selected	Ensure that the Marketing Options stay selected and display on the website and within client's accounts.
28	Bug Fix	GDPR change to enquiries	Ensure administrators can delete all personal information on closed enquires.

Scheduled Reports and bug fix release 12/05/2021

No	Type	Issue/Feature	Solution
1	Bug Fix	Bug fix on Venue Registration form	Ensure agreement to Terms, Privacy policy and Data agreement on the form before submitting.
2	Bug Fix	Bug fix on Client login venue settings	If a client user has access to multiple venues with different self service settings that the correct bookings can be edited/cancelled.
3	Bug Fix	Bug fix on the Reminders tab	Ensure Invoice Reminders are displaying correctly
4	Functionality	Change headings on 3 reports	Amended two column headings to be swapped over.

5	Bug Fix	Host email notification not sent on Non-Billable bookings	Ensure that the 'Host Non-Billable Client Notification Email' is received on booking creation.
6	Functionality	Scheduled Reporting	Adding Scheduled report functionality at Venue level
7	Functionality	Removing Multiple Venue options from reporting where user has access to only 1 venue	Report tab simplified for users who have access to 1 venue by removing unnecessary options.
8	Functionality	Scheduled Reporting	Adding functionality to allow saved Scheduled reports to be Edited and Deleted.
9	Functionality	Scheduled Reporting	Adding functionality to allow Scheduled reports to be run for Multiple venues - 1 report per venue.
10	Bug Fix	Venue admin Plus's unable to add Booking slots and Client flags	New Booking Slot and Add Client Flag buttons are now responsive to Venue Admin Plus's
11	Bug Fix	Bookable spaces able to be deleted despite having previous Bookings	Bookable spaces are not able to be deleted if they have previously had bookings in them.
12	Functionality	Purchase Order field displaying on self booking form for Non-Billable Clients	Removed Purchase Order text box on New Booking form for self-booking Non-Billable client's as field is unnecessary.
13	Bug Fix	Tentative booking not displaying correct payment options after items cancelled	Ensure Tentative bookings display/ don't display payment/confirmation option if some dates are cancelled depending on items remaining
14	Bug Fix	If Tentative booking expires, Pay now button is unresponsive	Ensure that if Tentative booking has expired and client clicks to Pay now that they are correctly redirected.
15	Bug Fix	Confirmed bookings displaying as with incorrect state	Ensure confirmed bookings display with Confirmed state and correct email notification button
16	Bug Fix	Partially Confirmed bookings displaying with incorrect number of confirmed items and incorrect number of total items	Ensure that for partially confirmed bookings that the number of confirmed items and number of total items is accurate.

Instant Payment and Bug fix release - 04/02/21

No	Type	Issue/Feature	Solution
1	Feature	Stripe - Implement Strong Customer Authentication	Stripe payments made by clients by card to use 3DS Strong Customer Authentication in order to protect cards from being fraudulently used.
2	Feature	Instant Pay scenario - after 90 minutes and admin cancels Billed Tentative booking	Ensure that if an administrator cancels a tentative booking that has a tentative invoice, that no Credit note is created
3	Feature	Allow Master Venue Admins to switch on Instant payments	New option within the Manage tab - Billing tab for the Master Venue Admins to be able to switch on Instant Payments at their venue
4	Feature	Minor display changes to client booking form	Display changes to the existing booking form - moving Confirm button, amending text displayed, adding Text Box, adding Purchase Order field and changing 'Save Booking' button to 'Book'.
5	Feature	Paying for booking instantly as a client	When clicking Book the availability is rechecked. Process if payment total is zero. Process if payment is due. Successful payment message. Process if venue does not have Instant Payment set up.
6	Feature	Display a message when I try to book and my dates are no longer available	If bookings become unavailable between client checking availability and client clicking to book then a message displays to inform them.
7	Feature	Confirm booking when no payment is due	If no payment is due for a booking, then the booking should become immediately confirmed, not tentative.
8	Feature	Display Tentative Bookings to Admins and Clients	Displaying Tentative bookings to admins in the calendar and bookings tab. Displaying Tentative bookings to clients in the calendar and bookings tab. And new Bookings Tab filters for both
9	Feature	New Booking Summary and Pay as you go option on client booking forms	Displaying a new Booking Summary section on New, Provisional and Confirmed bookings. A new Pay As You Go option on client booking forms (where applicable)
10	Feature	Unsuccessful payments process	Where client is taken in system if an unsuccessful payment is made from Booking or from Invoice.
11	Feature	New process for booking from the calendar	Simplified process if client books from the calendar tab. Also new Other category for Calendar spaces not allocated to Calendar category.
12	Feature	Tentative Invoices Design	Design for Tentative invoices when viewed as Client or Admin.

13	Feature	Delete Tentative Bookings & Void invoices where payment not received within 1 hour	Process for if the Payment is not received for a Tentative Booking/invoice after expiry time passes. How this displays to admins and clients
14	Feature	Changes to the Booking Summary Page when Tentative	Message on Booking to show client Tentative booking Expiry time. Rules for when Edit and Cancel options should and should not show on Tentative bookings. Payment Button and successful message display.
15	Feature	Reports: Bookings Reports Amendments	Ensure that Tentative bookings show on the Bookings Value Report, Bookings Value Report CSV and are included in the Dashboard totals
16	Feature	Amend which emails are sent when using instant pay	Ensure that the correct emails are sent to Client Users and to the Venue contact email on the client creating, confirming, editing and paying for a booking
17	Feature	Only confirm provisional bookings at the point of payment being successful	Ensure that for Billable bookings where a payment is due, only once a successful payment has been made that it changes to a confirmed status
18	Feature	After 1 hour, convert any tentative bookings that were input by admin as provisional back to provisional	If a tentative booking does not receive payment by the expiry time set in the Venue's organisation, and it was created as provisional by the administrator, then it should return to a provisional state
19	Feature	Do not allow Admins to delete/edit tentative bookings until expiry plus 30 mins has lapsed	Fail safe so that if the system does not automatically delete a tentative booking after it has passed it's expiry time, then 30 mins later administrators will be able to delete or edit the tentative booking.
20	Feature	Display Tentative Invoices to admins and clients	Ensure that administrators can view tentative invoices but not be able to void them unless they were created over 90 mins ago, and was not deleted by the system. Ensure Tentative invoice show in the 'Invoices awaiting payment section' of the invoices tab
21	Feature	Make the Expiry time configurable in the database	To make the expiry time amendable for venues in the organisation admin area.
22	Feature	PAYG options & Booking summary boxes are not displaying for large bookings	Ensure that for any bookings with 52 occurrences or more that it displays the correct Pay as you go functionality and Booking summary box.

23	Feature	When clicking to pay in full for my tentative bookings, I want to still have the option to change my mind and PAYG	Client can change selection to either Pay As You Go or not, while viewing a Tentative booking.
24	Feature	Do not allow Admins to action tentative bookings from the bookings tab	Ensure that the selection boxes are greyed out and edit option does not show for Administrators while viewing a tentative booking that has not passed it's expiry time on the bookings tab.
25	Feature	Amend the VAT bulk edit for bookings to ignore tentative bookings	Ensure that the VAT bulk edit does not change the VAT on Tentative bookings
26	Feature	Invoice reports amendments	Adapt the All Invoice and Credit Notes report to display tentative invoices and adding an additional column for Invoice Status
27	Feature	Display the correct Edit/Cancel options to users confirming provisional bookings that subsequently turn tentative	Ensure that the Edit/ Cancel options that display on Provisional bookings for clients with self-service functionality are in line with Tentative Edit/Cancel options
28	Feature	Update Terms, DPA and PP within BookingsPlus	Update the venue Terms and Conditions, Data protection policy and Privacy Policy with new Head Office Registered address
29	Feature	Auto invoicing fix	Run through of Auto-Invoicing functionality
30	Feature	New Stripe checkout process	Upgrade to Stripe checkout from Invoices and Bookings.
31	Feature	Void tentative invoices when client changes to PAYG and no payment is now due	If the client switches to Pay as you go on a tentative booking, after a tentative invoice was created by the system, and no payment is now due, ensure that the Invoice is correctly voided.
32	Feature	Provisional booking with dates in the past not dealt with correctly in Instant pay	If an administrator creates a provisional booking with dates in the past, ensure clients with Instant pay set up are correctly given ability to make payment.
33	Feature	Raise invoice & request payment when a booking is amended to a current month booking	If a self service client edits a future confirmed booking to the current month then the system will create an invoice for it.

34	Feature	Amend the current warning message when trying to disable Stripe gateway	Warn venue admins that if they have Instant Pay set up, and then disable their stripe payment gateway, that it will switch off Instant Pay for the whole venue
35	Feature	Allow specific clients NOT to be subject to the Instant Pay rules	New option within the client edit page to switch off a client from Instant pay rules
36	Feature	Clients 'Excluded from Instant payments' should have instantly confirmed bookings	Ensure that if a client is excluded from Instant pay rules that when confirming/ creating new bookings they have a confirmed status
37	Feature	Minor text change to the wording when activating Instant Pay as an admin	Further amendment to text shown next to option to activate instant pay as an administrator
38	Bug Fix	Self service clients not being limited to the calendar categories they are set up to use	Ensure that if a self service client is set up to be limited to booking particular Calendar categories that this is working correctly
39	Bug Fix	Account balances incorrect and invoice number skipped	Ensure that if administrator double clicks 'Send by email' or 'Mark as sent' on an invoice that it does not incorrect record in the client's account balance and that the Invoice number assigned is sequential.
40	Bug Fix	Total amounts and amounts payable in the booking summary not adding up correctly	Ensure new booking summary box is correct if there is an unavailable date or future date
41	Bug Fix	If a tentative booking was created more than 30 mins ago it is vanishing	Ensure Tentative bookings show to administrators correctly until they pass expiry time/are deleted/return to a provisional booking
42	Bug Fix	Booking summary options not showing on Mobiles	Ensure Booking summary options display correctly if client viewing/creating booking on a mobile device.
43	Bug Fix	Tentative booking expiry time does not save on editing	Ensure that the Organisation expiry rule can be amended.
44	Bug Fix	Pay now via stripe button not working on Internet Explorer	Ensure that new payment options are working correctly on Internet Explorer.

45	Bug Fix	Pay with stripe on tentative booking not working on test venue	Ensure Stripe payment options are set up and working on our test venue
46	Bug Fix	Tentative booking incorrectly creating when client clicks to confirm booking with £0 payable	Ensure a tentative booking is not created in scenario where booking is partially confirmed by administrator and nothing is payable now
47	Bug Fix	Calendar options not fully visible when creating a booking	Display amendment of the Calendar popup on the New Booking form
48	Bug Fix	Client can edit a booking to a date that they should not be able to	Ensure that the booking rules for where/when a self service client can book also apply to when they edit bookings too
49	Bug Fix	Clients don't have the correct time options when editing a booking from non-slotted room to a slotted room	If a client edits a booking from non-slotted room to a slotted room and visa versa then the room should display the correct time options
50	Bug Fix	Are payments on tentative invoices adjusting account balances correctly	Ensure that new Tentative invoices are adjusting a clients account balance correctly.
51	Bug Fix	Account balances not updating correctly when credit note voided	Ensure client account balances are updating correctly when a credit note is voided

Bug Fix Release - 22/10/20 09:51

No	Type	Issue / Feature	Solution
1	Bug Fix	Clients having 404 'Unauthorised access' messages when trying to view bookings	Client importer has been fixed to make sure that all new clients created via import have the correct levels of access
2	Bug Fix	Website deactivation/activation notification email not sending	When a venue's website is activated or deactivated, customer services are notified

3	Bug Fix	Client users not able to be set up with email ending in .academy	Client users can now be created with .academy at the end of the email
4	Bug Fix	Credit Notes displaying incorrectly when Partially allocated	Multiple Credit notes can be allocated to 1 invoice, and then any remaining credit can be allocated elsewhere
5	Bug Fix	Vancouver website images distorted/stretched	Vancouver website template images have been fixed so no longer distorted
6	Bug Fix	Voided invoices losing some of their data when bookings cancelled and say 'No' to raising a credit note	When invoices that contain cancelled bookings are voided the correct data still displays
7	Bug Fix	Invoice wont raise when a space has zero cost and sundries with costs.	Billable sundries attached to Free bookings can be invoiced correctly
8	Feature	New Venue Deactivation option	If a venue is deactivated, clients can still access their data without needing to accept Terms and conditions/Privacy Policy for the deactivated venue. Also, the news and venue documents for the deactivated venue will no longer display on the clients dashboard
9	Bug Fix	Non-billable client users are receiving the billable clients booking confirmation emails when selecting ‘Email confirmed’ from the Booking page.	Non-Billable clients now correctly receiving the non-billable client booking confirmation email, when clicking 'Email confirmed' on the booking page
10	Bug Fix	Totals not updating (in the availability check table) when editing/cancelling items	Any edits or cancellations performed in the 'Green/Red' availability check booking table now correctly updates the totals displayed at the bottom of the table.

11	Bug Fix	DataTables warning message showing on clicking some bookable spaces	Bookings on viewing spaces are now displaying correctly, and no error messages are being received
12	Bug Fix	Host fields on Booking Form disappear when there are errors to fix on the form	If the booking form has missing information and shows an error notification, the host fields now still show and can be populated

Bug Fix Release - 23/09/20 08:15

No	Type	Issue / Feature	Solution
1	Bug Fix	Saturday / Sundays not bookable by clients	If a venue has slots setup for Saturday / Sunday, then these will now display to clients, when creating their own bookings (where applicable), and they will be able to book on these days
2	Bug Fix	404 and 500 errors when a user is deleted that had completed the venue registration	Master Venue Admin will be presented the Venue Registration form again. Any other users accessing the venue, will see a message saying that they do not have access as the venue registration is pending
3	Bug Fix	Client users able to edit bookings from calendar tab at non self service venues	Where the venue setting does not allow clients to make their own bookings, then clients can not create, edit or cancel their own bookings from anywhere in the client account
4	Bug Fix	%BOOKINGS% variable in emails sent to users displays the bookings in a wrapped string instead of on individual lines	The %BOOKINGS% Variable now lists out booking items on separate lines in booking confirmation emails sent out
5	Bug Fix	Whenever an admin or client edit's a booking it is triggering a confirmation email	Booking confirmation emails are not sent out when a booking is edited. They are only sent out when a booking is confirmed by an admin or a client.
6	Bug Fix	Formatting options disappeared from Privacy Policy and Terms & Conditions	Formatting added back in the Manage > Client Login tab
7	Bug Fix	Marketing option tick boxes not visible on Classic enquiry form	The tick boxes do now display where applicable on Classic website enquiry forms
8	Bug Fix	Incorrect venue address showing on invoices, for clients only, where they book at more than one venue	As a client, when I am logged into my account, and view an invoice from the dashboard that is for a different venue than the one that is currently displaying at the top of my screen, then when I select that invoice, the correct address for the venue does now appear on the invoice.

9	Bug Fix	On the All Credit Notes Report, The voided by column is populated with '(Deleted)' even when the credit note has not been voided	Where a credit note has not been voided, the 'Voided by' column will be blank
10	Bug Fix	Start and End date on websites adverts on what's on page do not work	Slight change to design here to make it more user friendly, and has been fixed so that website adverts display on the websites based on the settings
11	Bug Fix	Incorrect green banner showing for Site Staff Plus/Site Staff sign-in	Site Staff Plus and Site Staff Admin Users will now see the green banner for admins and not the ones for clients
12	Bug Fix	"Summary" filter on Bookings Tab not operating properly	When you now switch to the summary filter on the bookings tab, you will have one line per booking and can then click to view specific bookings to see any of the recurring dates within them.
13	Bug Fix	Client Account - Voided Invoice still showing payment options	When a client now views a Voided invoice, they will not see any payment buttons
14	Bug Fix	Banner messages not showing in a couple of places, on admin cancelling booking and raising credit note	When admins now cancel from the calendar, and from the booking page cancelling a line item, all admins will see the correct banner message
15	Bug Fix	Calgary Default Banner Background Image does not display on the website. Can see the homepage image instead.	Default banner background images uploaded for Calgary websites, will now display on all pages (except the homepage)
16	Bug Fix	Generating a Report for Multiple Venues (One report per venue) is creating an Error Page	Master Admins option for scheduling (at 11pm) reports to run (1 per venue selected) is now working again.
17	Bug Fix	Website Categories colours and orders are not reflected on the websites.	On Calgary & Classic website templates, the categories are now displayed in the correct order and with the correct colours (as per settings in the admin area). Note that Vancouver websites have the correct ordering of categories now however the colours relate to the colour scheme selected for the website template (this is by design)
18	Bug Fix	Add New Category button on bookable space not functioning	As an admin creating or editing a bookable space, the Add new category button now works and I get a popup allowing me to create new categories
19	Bug Fix	Bookingsplus report does not match the BVR	Billed bookings that are cancelled and the user said no to raising a credit note, are now included in the report, so will match to the BVR again
20	Bug Fix	I can view the clients page for a different venue that I manage, within my venue, when I select that client from the users page	If I select a client that is in a different venue that I don’t manage, then I will get an 'unauthorised access' message If I select a client that is in a different venue that I do manage, then I am just redirected to the current clients tab - this is how it used to work so just bug fixed that issue
21	Bug Fix	BVR's incorrectly showing the calendar category in column G	When I view the Category column now on the BVR, it displays the booking category and not the calendar category
22	Bug Fix	Security error on clicking website login link to login as a client	When a user clicks the Login button on websites, a new window will open for https://my.schoolbookings.co.uk. This is a secure page.

23	Bug Fix	BVR not showing Organisation/company name in Client column	Company name has now been added back into the BVR (in brackets) as it previously used to work
24	Bug Fix	Error making bookings as client with access to multiple venues	As a client, doing a booking from the bookings tab, when I select a different venue in the dropdown tab than what is displayed at the top of my account, then the venue at the top updates to this newly selected venue, and I can proceed with my booking without any errors
25	Bug Fix	URL redirect issues my.admin.schoolbookings when logging in as a client	When I log out as an admin, and try to login as a client, then the system will recognise this is a client login and switch the URL to my.schoolbookings.co.uk so I can log in without any security issues
26	Bug Fix	Ticking to 'Only display unallocated / unpaid items' on a clients account incorrectly includes voided credit notes and fully allocated refunds.	As an admin, when I tick to 'only display unallocated/unpaid items' then the filter will no longer include voided credit notes. Unfortunately it will still display refunds that are fully allocated - to be fixed at a later date.
27	Bug Fix	Voided invoices are updating with changes made to the bookings on them	Voided invoices are frozen so that data on them cannot be updated, even when the original booking item has changed
28	Bug Fix	Error when editing an enquiry line item using pencil	When I now click on the pencil on a line item on an enquiry to edit it, I am able to do so, and no longer get an error popup
29	Bug Fix	Enquiry form on Classic website not lined up correctly when viewed on Internet Explorer 11	When I view the classic website enquiry forms using IE 11, the fields are now correctly aligned
30	Bug Fix	Excel export button on bookings tab in clients account doesn't seem to be working	As a client on the bookings tab, when I click the Excel Export, it will now export the results of what is on my bookings page (including any filters that I have applied). The dates columns have been amended so that the content is a consistent format
31	Bug Fix	Strapline on blog posts being populated with the main body text field, for Vancouver and Calgary website templates	Strapline field is now correctly saving the text that is entered into this field, and not overwriting it with the main body text
32	Bug Fix	Invoices for Kajima Partnerships venue out of line	In the Kajima Partnerships Limited venue, the invoices have been fixed so they display correct formatting
33	Bug Fix	Getting an error on Clicking a venue hyperlink from my booking	As a client, on the bookings tab viewing a specific booking, the venue displayed is no longer a hyperlink and therefore I cannot click it
34	Bug Fix	Client Name and Organisation Name not displaying on Reminders Report	The client name and organisation name are no displaying in the correct columns on the reminders report
35	Feature	Improve performance of Clients Tab	As an Admin, when I click on the clients tab, this will now display immediately (some venues were taking 1-2 minutes to display). There is a bit of a trade off that will be further improved later, which is that searching on the clients tab for a specific client now takes a few seconds rather than being instant.

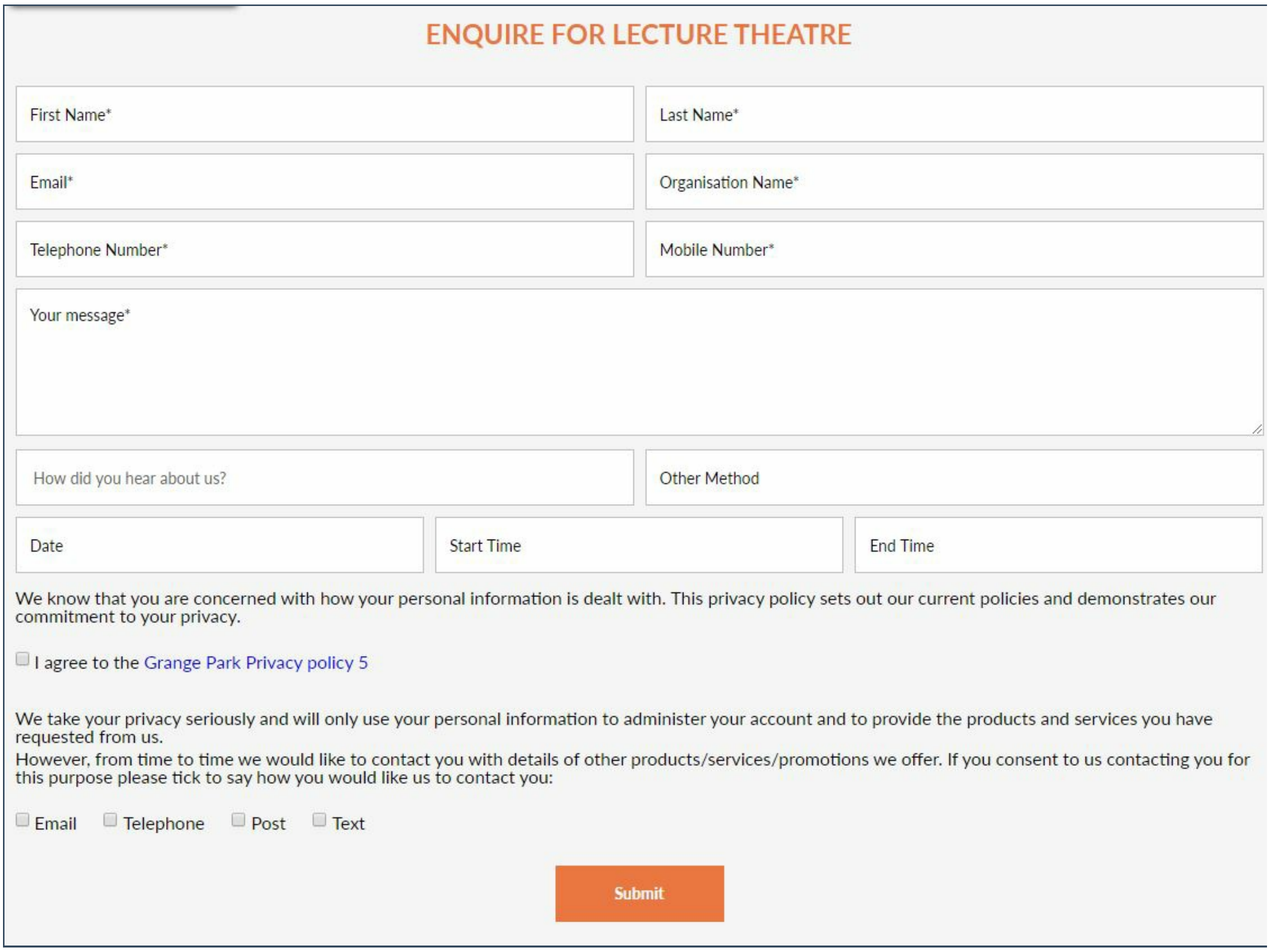
36	Feature	MVA's should not have the option to add organisation admins	Only Master admins can now add/create organisation admins
37	Feature	Make host fields available on Renew booking	As an admin, when I now click to renew a booking, and my host template emails are populated, then I will now see the host fields on my renew booking form, so that these can be populated
38	Feature	Need a way to easily get statements info out from the system for comparisons on go-live	Developers have now created a routine that will allow us to quickly export all invoices out of the system but with basic data on it, which should help for testing purposes and analysis
39	Feature	Need a way to easily get bookings info out from the system for comparisons on go-live	Developers have now created a routine that will allow us to quickly export all bookings out of the system but with basic data on it, which should help for testing purposes and analysis
40	Upgrade	Architecture Upgrade	Architecture upgrade to minimise any security vulnerabilities
41	Upgrade	Solve Issues With Test Suite Reliability	Improvements to our Test Suite to help minimise regressions etc.

Privacy Policy & Marketing Options on Enquiry Forms on Websites

Last Modified on 18/02/2022 11:57 am GMT

BookingsPlus provides you with the option to present your privacy policy on all of your enquiry forms on your website, and also to display marketing options for enquirers, enabling them to opt in to your marketing communications. These are optional. To set these up, please see article: Set-up Privacy Policy and Marketing Preferences

Depending on the type of website template you are using, the enquiry forms on your websites will look similar to below:


ENQUIRE FOR LECTURE THEATRE

First Name*

Last Name*

Email*

Organisation Name*

Telephone Number*

Mobile Number*

Your message*

How did you hear about us?

Other Method

Date

Start Time

End Time

We know that you are concerned with how your personal information is dealt with. This privacy policy sets out our current policies and demonstrates our commitment to your privacy.

I agree to the Grange Park Privacy policy 5

We take your privacy seriously and will only use your personal information to administer your account and to provide the products and services you have requested from us.
However, from time to time we would like to contact you with details of other products/services/promotions we offer. If you consent to us contacting you for this purpose please tick to say how you would like us to contact you:

Email Telephone Post Text

Submit

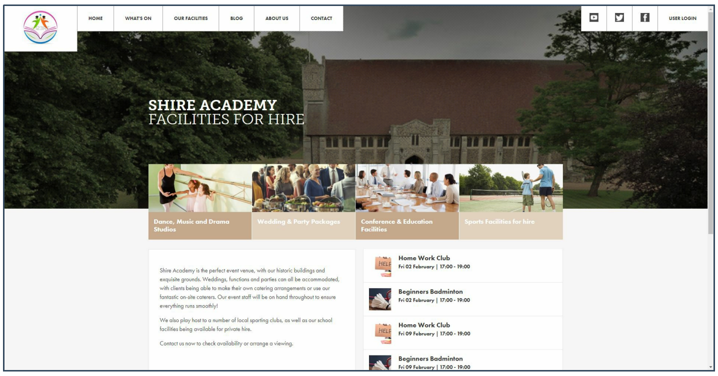
The text above the tick box for agreeing to the privacy policy is defined by you. We have provided an example of the text that could be used here. Please note that the text above the marketing tick boxes is fixed and cannot be changed at this time.

Switching to a new website template

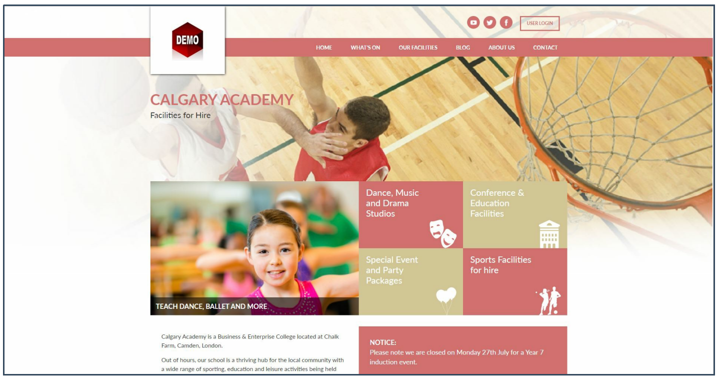
Last Modified on 03/02/2021 6:59 pm GMT

At BookingsPlus, we realise it's not a one size fits all scenario. To help with this, we've developed alternative website templates so you are able to choose which will work best for your venue.

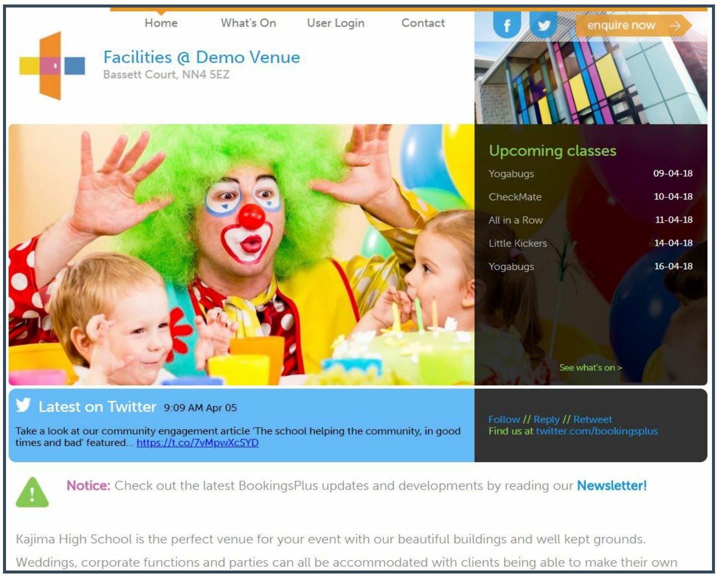
You have full control over the colour themes and pictures, as well as being able to turn various features on/off (e.g. What's On page, Blog etc). We've created sample websites to help you make your decision. Why not take a look? If you've been with us some time, you will be on the Classic template.



Vancouver - http://vancouver.schoolbookings.co.uk/



Calgary - http://calgary.schoolbookings.co.uk



Classic - http://classic.schoolbookings.co.uk

Here's some examples of live websites to show how our websites can be customised to complement your logo and branding.

Vancouver template - Bushey Academy - https://thebusheyarena.communitybookings.co.uk/

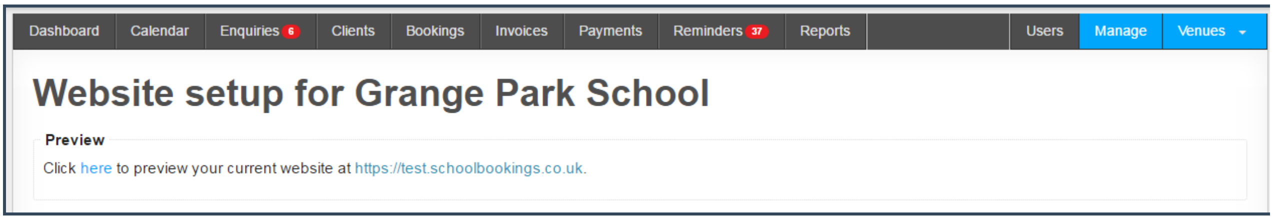
Calgary template - ISCA College of Media Arts - https://iscaexeter.schoolbookings.co.uk/

Classic template - Great Park Community Centre - https://gpcc.communitybookings.co.uk/

Once you've decided which website template suits you best, then contact us at the helpdesk and we will make the switch to the new template for you. You will need to add a few extra pictures and details, so do make sure you have some time spare.

Please consider these points before switching:-
Overall colour scheme for your website - do you want to tie in with your logo? If so, BookingsPlus uses hex colours & we can help identify the colour codes if needed
Pictures - the new templates are a great place to show off your venue! Do you have the perfect pictures for the home page banners? We can help if you send through full size original pictures.
What's On - this is an optional section - do you wish to publish your classes on your website?
Blog - this is an optional section, ideal for keeping people up to date on any exciting news, new bookings etc
About Us - this is an optional section - great to give your potential customers more information!

We recommend that you keep checking your updates as you go along - there's now a handy preview from your **[Manage]** tab



We advise that you keep your website live throughout this process, as it can have a detrimental effect on your Google presence if it is taken offline. With this in mind, do make sure that you allow enough time to fully complete the changes in a short time frame.

Specifications: To make your transition easier, the dimensions for the pictures on the templates are below:

Picture size guidelines (JPGs)

	Classic	Vancouver	Calgary
Scrolling Banners	1920 x 720	X	X
Background Banners	X	1150 x 650	1150 x 650
Category Pictures	1040 x 642	1040 x 642	1040 x 642
Website Spaces	1040 x 642	1040 x 642	1040 x 642
Logo (top left)	240 x 240	240 x 240	240 x 240
Venue Picture (top right)	320 x 165	X	X
Adverts	Images will resize to fit		
What's On booking pictures	Images will resize to fit		
About Us pictures	X	1024 X 768	1024 X 768
Facilities pictures	X	1024 X 768	1024 X 768
Classes placeholders	X	1024 X 768	1024 X 768

In most cases, pictures will resize to fit the space. However, this may mean that it will crop the image.

Instant Pay

Last Modified on 09/02/2021 2:51 pm GMT

Instant Pay is our brand new functionality that we have developed to allow clients to be able to make payment via Stripe before confirming or creating a booking.

This functionality can be switched on for all clients or set up for individual hirers depending on your venues' needs or the type of client.

The Key Benefits of setting up Instant pay are:

- Reduced admin for your venue as you will no longer need to raise manual invoices for last minute bookings
- Reduced debtors as bookings are not confirmed until the payment has been received for the current calendar months bookings
- Quicker and smoother booking process for your hirers

It works seamlessly with Stripe, but there is no reason that this could not be extended to work with other payment gateways in the future. We chose Stripe because we wanted immediate payments which we felt is not what you get with other payment providers at the moment.

Please take a look at our articles to get more information on what it will look like from both your login and what you would need to do to get it set up and working for your venue:

Instant Pay Feature: How to set it up at your venue

Instant Pay Feature: Booking changes for Administrators

Instant Pay Feature: Invoice changes for Administrators

Instant Pay Feature: Report changes for Administrators

Within our Instant Pay release we have also included some upgrades to the Client area that will be visible regardless of whether your venue has Instant Pay switched on. To take a look at what these are view our article: General Client account upgrade

Then to see and understand how the Instant Pay process will look for your clients, take a look at these articles too:

Instant Pay Feature: Client account process for Confirming a Provisional booking

Instant Pay Feature: Client account process for Creating a Tentative booking

Please don’t hesitate get in touch if you have any questions regarding anything in our latest release, our Helpdesk can be reached at helpdesk@bookingsplus.co.uk or on 01604 677764. Our hours are Mon-Fri 09:00 - 17:30 (excluding bank holidays)

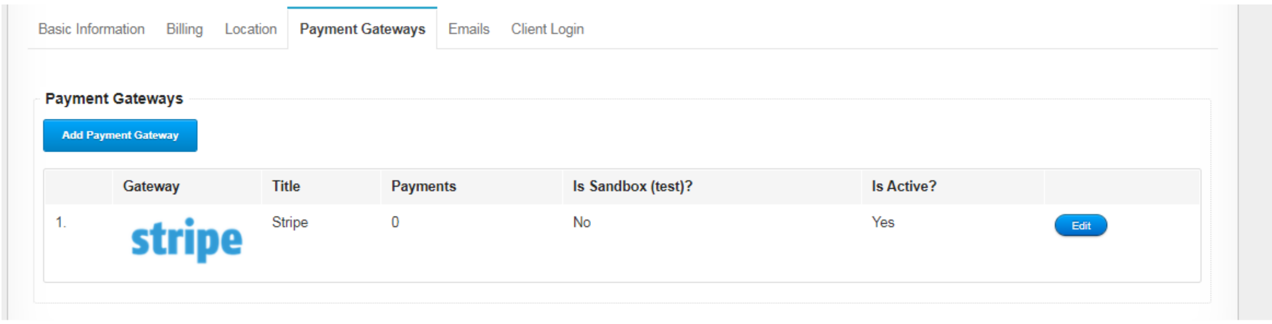
Instant Pay Feature: How to set it up at your venue

Last Modified on 09/02/2021 5:28 pm GMT

As a Master Venue Admin you now have the option to switch on instant pay at your venue. This will allow clients to pay instantly at the time of confirming (or self-service clients when creating) their booking through their login. Clients will either be able to pay for their whole booking in full OR will opt to Pay As You Go, and will be billed for the current calendar month’s bookings only. You will then need to ensure that future month’s bookings are billed accordingly.

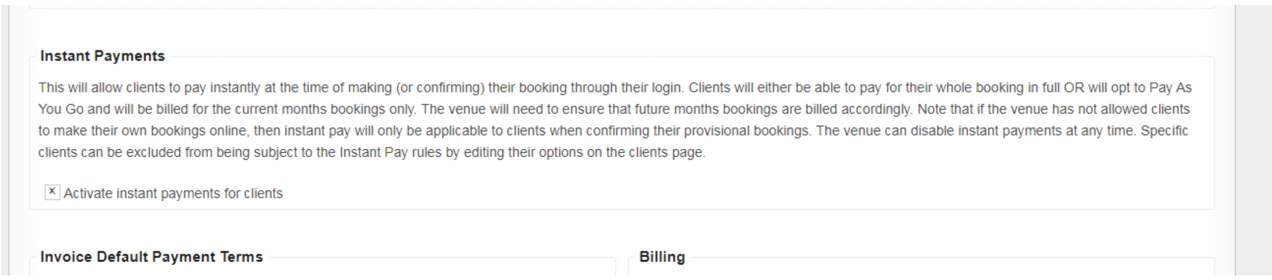
To activate this option, you need a payment gateway set up to accept payments via Stripe. We have designed Instant Pay to work seamlessly with Stripe because payments are immediate, and we want to help limit any debtors.

If you don’t have a Stripe gateway, this can be easily set up from the Manage tab – Click **Edit Venue** Button – Click **Payment Gateways** subtab– **Add Payment Gateway** button – ‘Click here to link to your Stripe Account’ button. Then just follow the steps on Stripe’s page. Once completed it will take you back to BookingsPlus with the Stripe Gateway showing.



Once you have a stripe account, you can set up the Instant payment in the **Manage** tab – **Edit Venue** button – **Billing** sub-tab.

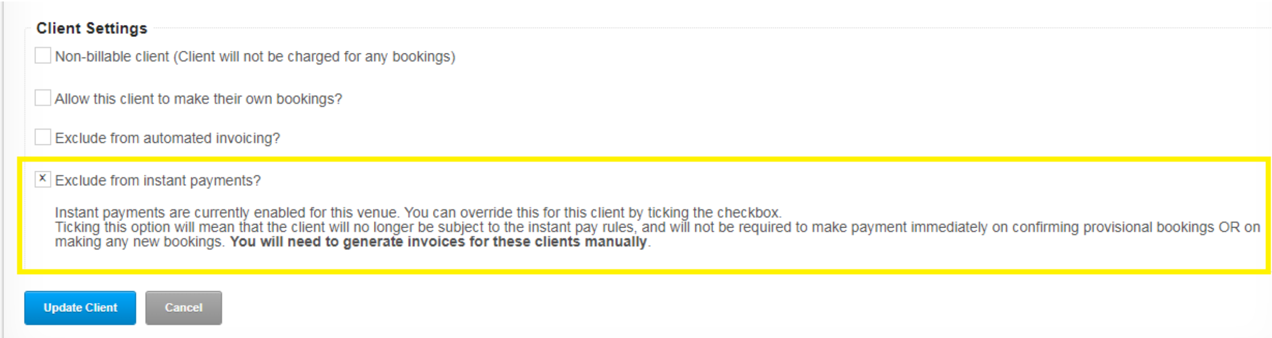
You will see a New option for Instant payment. Select the tick box and click the **Save** button on the top right hand-side of the page.



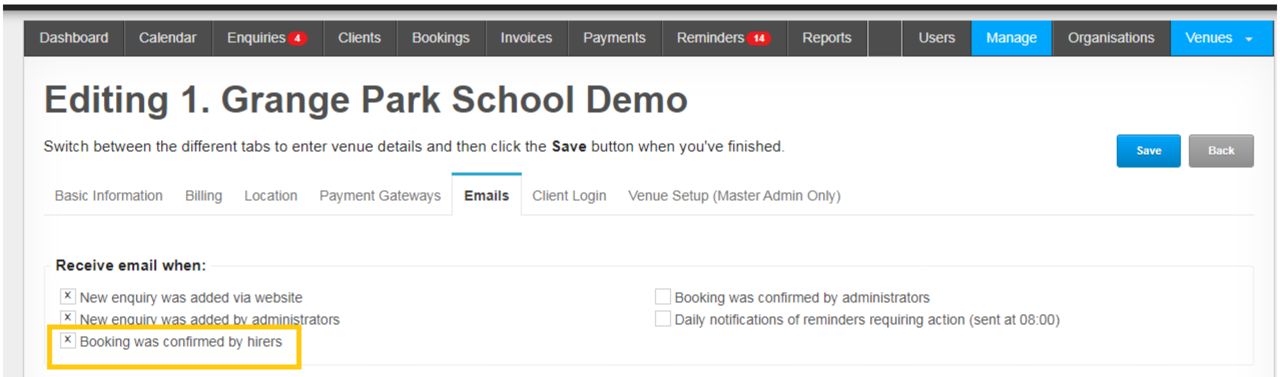
Please note; if you decided for whatever reason you no longer need or want a Stripe Gateway, this will automatically switch off Instant Pay for all clients.

At this point please contact us at the BookingsPlus Helpdesk on helpdesk@bookingsplus.co.uk to let us know your venue has Instant Pay set up, as we will need to tweak the setting for how long you would like to allow your clients to have to process their tentative bookings. Take a look at our Client Articles linked at the bottom of this page to see how this works, and to decide how long you would like this to be. We would recommend around 1 hour.

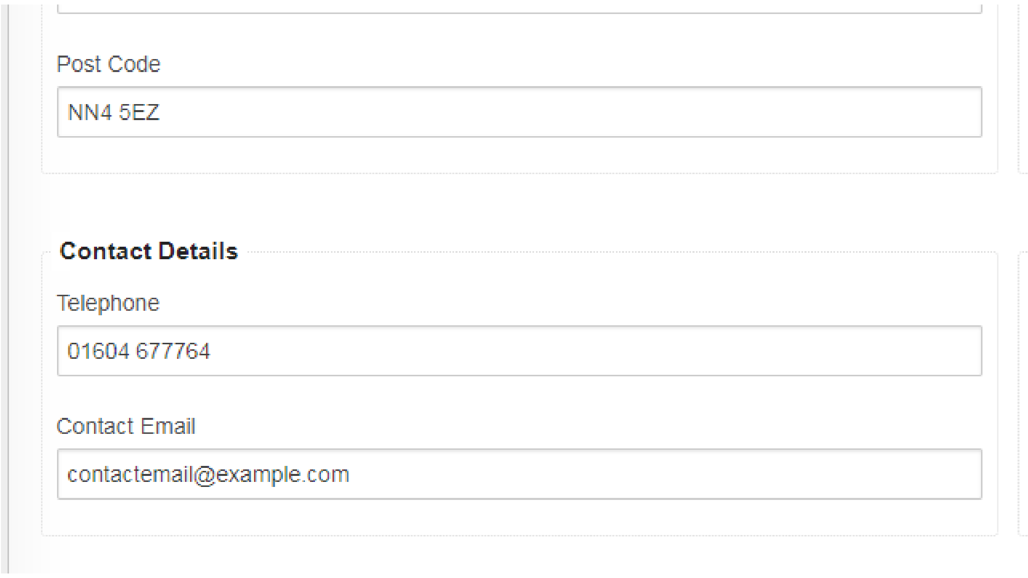
All clients at your venue will now be set up to make instant payment. If you would like to exclude certain clients you can do so from the Clients tab and click Edit for a client. At the bottom of the page you will now see a new option to exclude that client from having to make payment immediately when confirming provisional bookings or when making any new bookings. If this option is ticked, then the client can still be billed through the automated invoice run (as long as you haven't excluded them from that) or can be billed manually.



If you would like the Venue Contact email to get email notifications once a client has processed a booking, you will need to ensure this setting is set up. To check this go to **Manage** – **Emails** – and in the top '**Receive email when**' section tick '**Bookings was confirmed by hirers**' and click Save.



The email will be sent to the Contact email saved within your Venue's Basic Information tab:



Your venue is now ready to accept Instant payments. Take a look at our other Instant Pay Articles to see the changes this displays to you as the administrator:

Instant Pay Feature: Booking changes for Administrators

Instant Pay Feature: Invoice changes for Administrators

Instant Pay Feature: Report changes for Administrators

Or how it will now display to the Client:

Instant Pay Feature: Client account process for Confirming a Provisional booking

Instant Pay Feature: Client account process for Creating a Tentative booking

Note – if you are unsure if you have self-service clients set up, or would like to get more information on how to allow clients to self-book, please contact our customer service team on 01604 677764 and they will more than happy to talk you through this.

Instant Pay Feature: Booking changes for Administrators

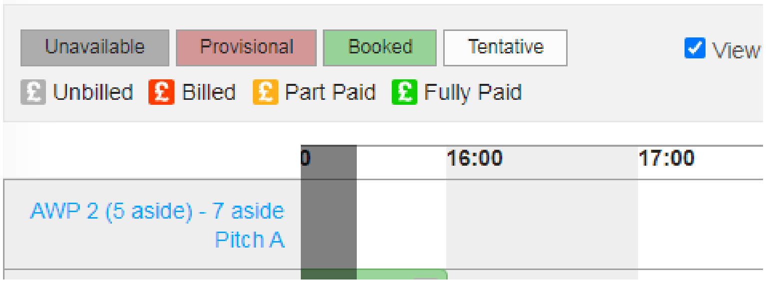
Last Modified on 09/02/2021 2:53 pm GMT

What is a tentative booking?

Once you have Instant pay set up at your venue, you will now notice a couple more small changes to the bookings system to cater for Tentative bookings. A tentative booking is one that is currently in progress by a client i.e. they are in the process of making payment for this booking. Due to this, you are unable to edit or cancel a tentative booking.

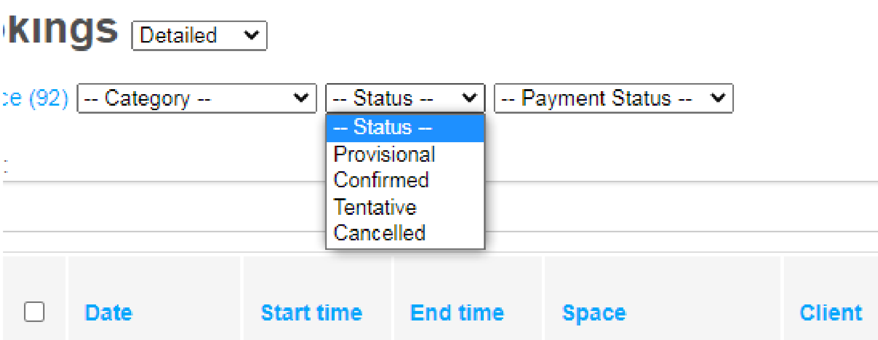
Calendar

In the Calendar, the key in the top left hand-side of the page will now include Tentative bookings, so that you can identify them when they show here. Tentative bookings will only show for up to 1 hour (if this is their expiry time) after they are created by a Self-Service client, or where a Provisional booking has been 'Confirmed' but not Paid by a Client, at which point if a successful payment has not been processed by the client, the bookings will be deleted or returned back to Provisional. If the payment has been processed it will then change to a confirmed booking.



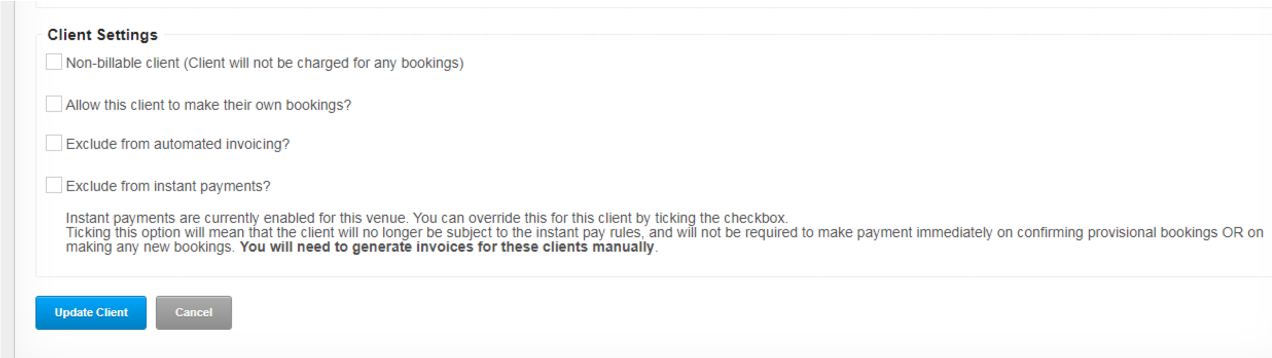
Bookings Tab

In the Bookings tab you will also now have a filter for Tentative bookings in the Status drop-down. This allows you to quickly identify any Tentative bookings that may exist at the time of searching in the Bookings tab.



Please note that tentative bookings have an expiry time set to 1 hour by default. If you would like to set a different expiry time, please get in touch and we will amend for you.

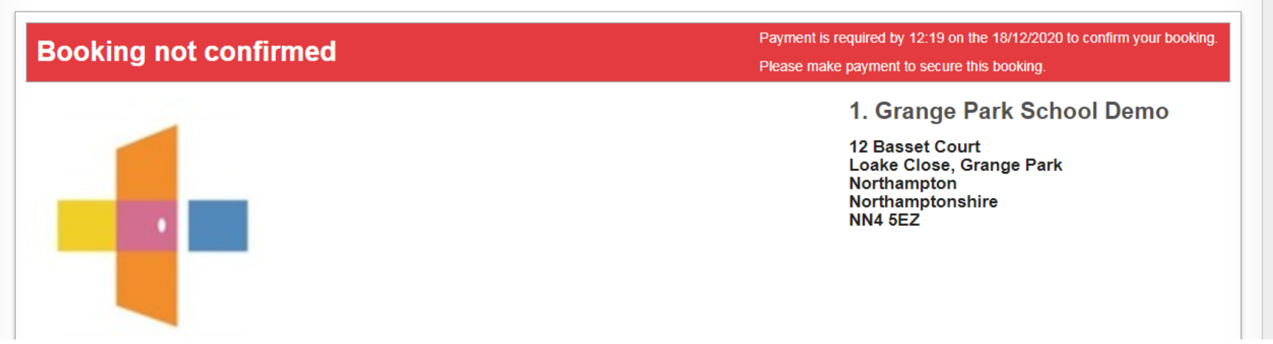
Quick note about a small change to the client settings on the client page
For simplicity, we have moved all of the Client settings to one place on the edit client form, under the header Client Settings. Depending on whether you have Instant pay or Self service settings set up at your venue will depend on whether you see all of the below options, otherwise you will just see the options for 'Non-Billable client' and 'Exclude from Automated Invoicing':



Instant Pay Feature: Invoice changes for Administrators

Last Modified on 08/02/2021 4:56 pm GMT

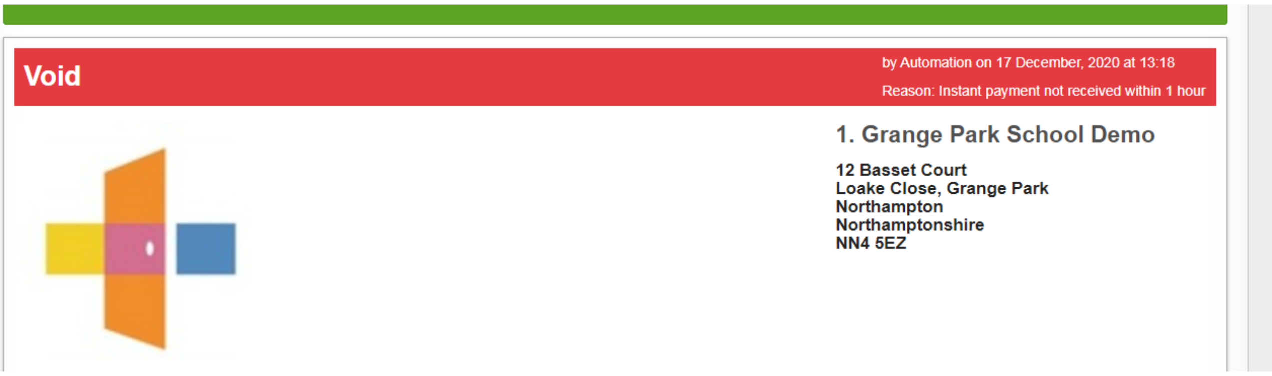
Once a client has started to process a payment via stripe (either for bookings they've created or bookings they are confirming), a tentative Invoice will be created. As a venue admin, you will be able to see this tentative invoice on the **Invoices tab** in **Invoices Awaiting Payment.** It will have an Invoice number, and a red banner over the top of it to state that "Payment is required by XX:XX on the XX/XX/XXXX to confirm your booking. Please make payment to secure this booking."



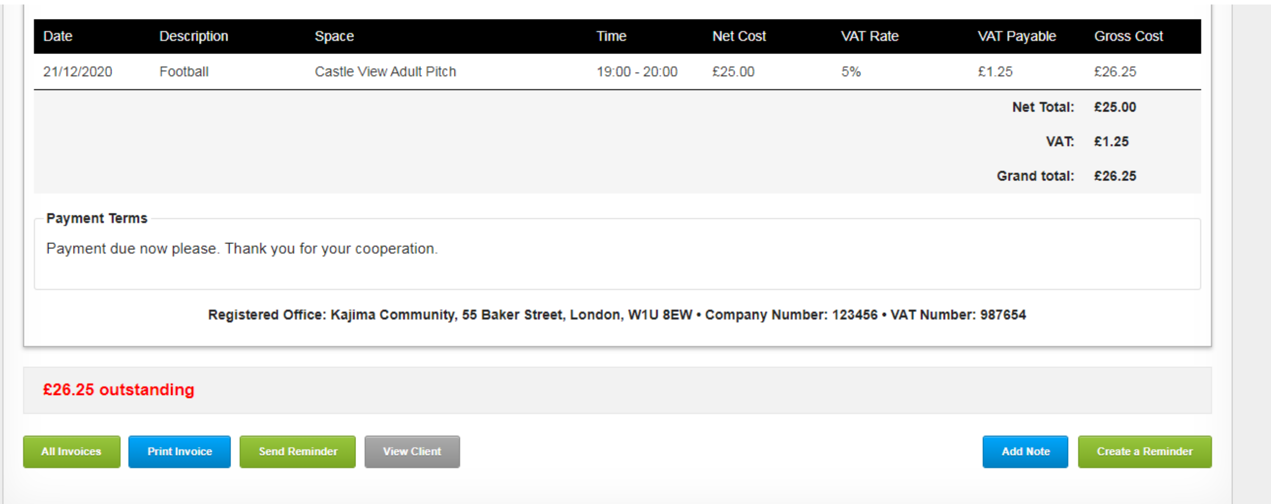
Please note that this message shows here to display exactly what the client can see and to show that the booking is in the process of being confirmed. The Invoice or Booking does not require any action from the administrator.

Tentative invoices will work in the same way as Full Invoices (that are awaiting payment) in that the booking items cannot be changed because the customer has already committed to make the payment. The main difference is that a tentative invoice can be raised on tentative bookings only, and is only generated when a client clicks to make a payment on a new or provisional booking. Once the payment has been successfully processed, the tentative invoice will became an actual invoice and will move to the **Paid Invoices** tab.

If a payment has not been received by the expiry time displayed on the invoice, then it will be automatically voided (with the message 'Instant payment not received within xx) and any related booking items will be cancelled so that the space is available again for others to book. The exception to this, is if the booking was originally entered by the admin as provisional and the client was confirming it. In this case, the booking will just revert back to being provisional again, so that the admin can decide whether this needs to be cancelled or not.



Whilst the payment is processing as an admin you will not be given the option to void the Tentative invoice.



Our automated Invoicing functionality works very well with Instant pay to reduce the admin time needed each month to Invoice clients for future bookings. For further information take a look at our article here.

Instant Pay Feature: Report changes for Administrators

Last Modified on 08/02/2021 4:51 pm GMT

All Invoices & Credit Notes report – The Invoice Report will now include tentative invoices, which will display in Purple, and a new column called ‘Status’ to display if the Invoice status is Tentative, Billed, Part Paid, Fully Paid or Void. It will also display Credit Notes as usual, with their status showing as either Raised or Void.

All Invoices and Credit Notes from 08/01/2021 to 08/01/2021

Date	Due Date	Number	Contact Name	Client Name	Status	Voided By	Date Voided	Reason For Void	Net	VAT	Total
08/01/2021	19/01/2021	GP5034	Abigail Peterson	Abby's Dancers	Fully_paid				£33.34	£0.00	£33.34
08/01/2021	13/01/2021	GP5035	Abigail Peterson	Abby's Dancers	Tentative				£50.01	£0.00	£50.01
08/01/2021	29/01/2021	GP5036	Abigail Peterson	Abby's Dancers	Billed				£16.67	£0.00	£16.67
									£100.02	**£0.00**	**£100.02**

The Bookings Value Report and Bookings Value Report (CSV) – The Bookings Value Report will now contain Tentative bookings to show any bookings that are in progress with a client. These will also display in purple and may be Billed or Unbilled depending on whether the client has attempted a payment yet.

Bookings Value Report from 13/01/2021 to 03/02/2021

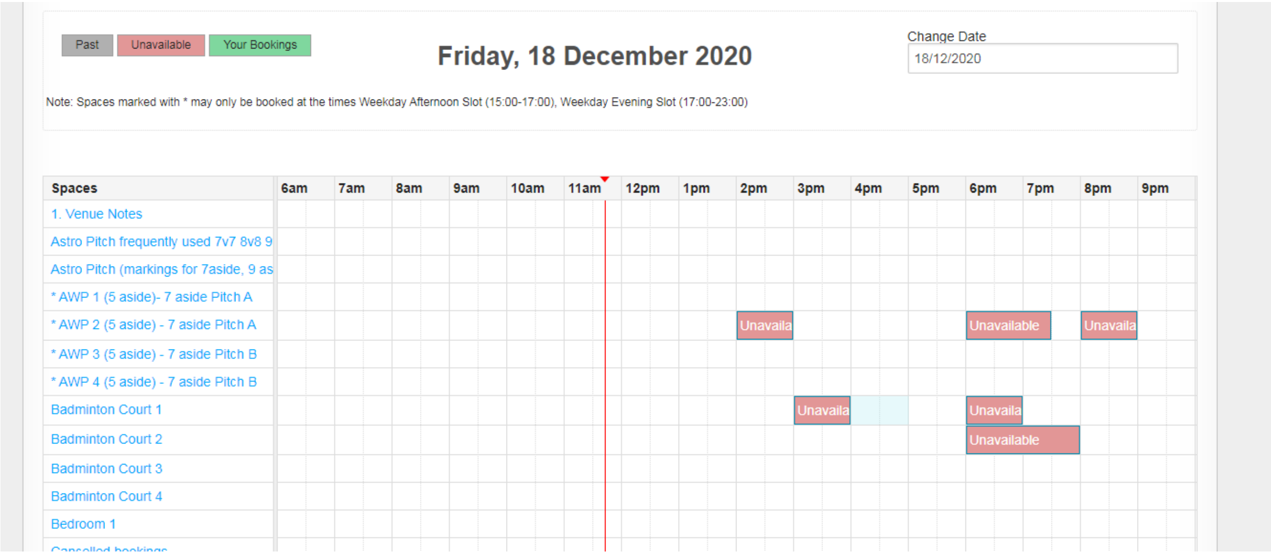
Venue	Date	Day	Start Tim	End Time	Client	Category	Description	Facility	State	Charge	VAT	Total	Payment status	Booked By Typ	Booking Ref
1. Grange Park School Demo	13/01/2021	Wed	15:00	16:00	Abigail Peterson (Abby's Dance		Ballet	Dance Studio	Tentative	£16.67	£0.00	£16.67	Billed	Customer	#520214
1. Grange Park School Demo	19/01/2021	Tue	15:00	16:00	Abigail Peterson (Abby's Dance		Ballet	Dance Studio	Confirmed	£16.67	£0.00	£16.67	Fully paid	Customer	#520213
1. Grange Park School Demo	20/01/2021	Wed	15:00	16:00	Abigail Peterson (Abby's Dance		Ballet	Dance Studio	Tentative	£16.67	£0.00	£16.67	Billed	Customer	#520214
1. Grange Park School Demo	26/01/2021	Tue	15:00	16:00	Abigail Peterson (Abby's Dance		Ballet	Dance Studio	Confirmed	£16.67	£0.00	£16.67	Fully paid	Customer	#520213
1. Grange Park School Demo	27/01/2021	Wed	15:00	16:00	Abigail Peterson (Abby's Dance		Ballet	Dance Studio	Tentative	£16.67	£0.00	£16.67	Billed	Customer	#520214
1. Grange Park School Demo	29/01/2021	Fri	15:00	16:00	Abigail Peterson (Abby's Dance		Ballet	Dance Studio	Confirmed	£16.67	£0.00	£16.67	Billed	Customer	#520213
1. Grange Park School Demo	03/02/2021	Wed	15:00	16:00	Abigail Peterson (Abby's Dance		Ballet	Dance Studio	Tentative	£16.67	£0.00	£16.67	Unbilled	Customer	#520214

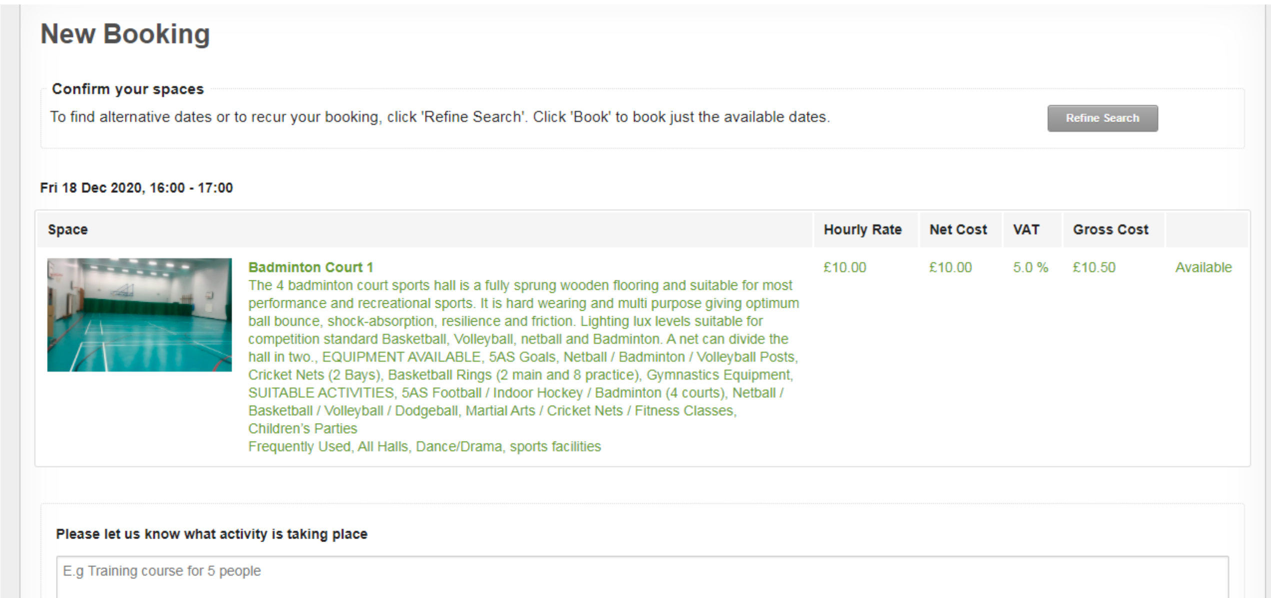
General Client account upgrade

Last Modified on 08/02/2021 4:51 pm GMT

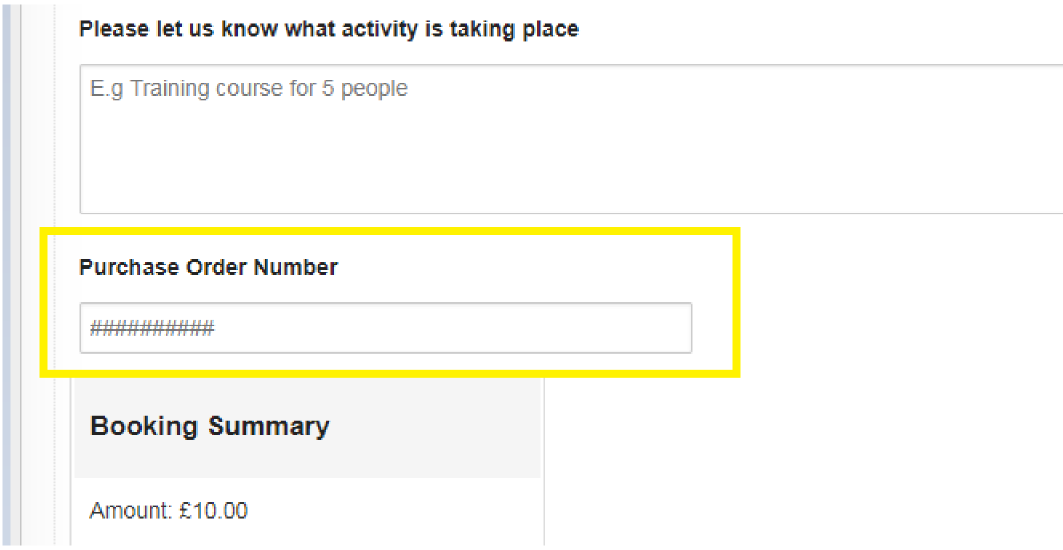
Changes for Self-booking clients:

Following client feedback, we have simplified the client booking experience from the calendar. Instead of when dragging a time or slot in the calendar the client sees a pop-up, Client's will now automatically be redirected straight to a booking page, with the slot/times selected visible on the page. They will have the option to complete the booking by clicking Book, or to add recurrence by clicking ‘Refine search.’

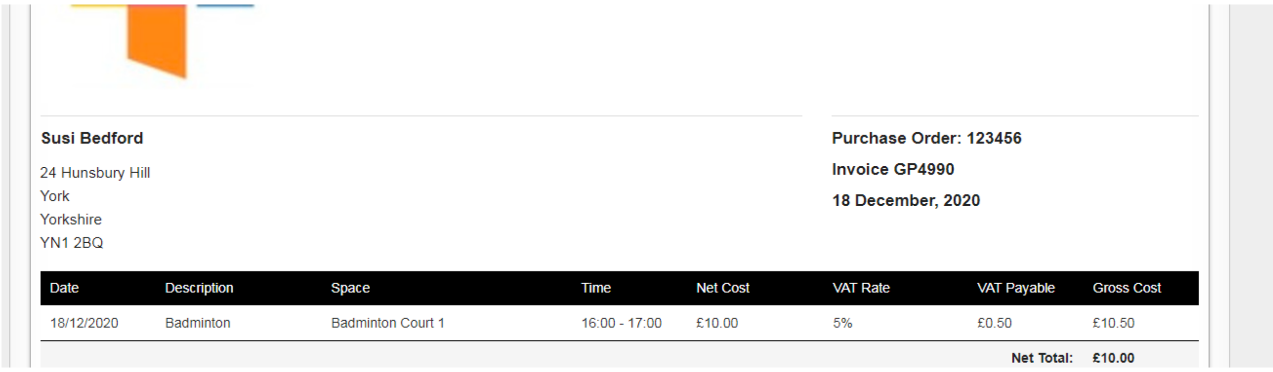




Also on the Booking form, there is now a Purchase Order field, where clients can enter their own Purchase Order reference, rather than having to contact the venue after creating the booking, to have the administrator add it in:



Purchase order displaying on the Invoice:



Susi Bedford
24 Hunsbury Hill
York
Yorkshire
YN1 2BQ

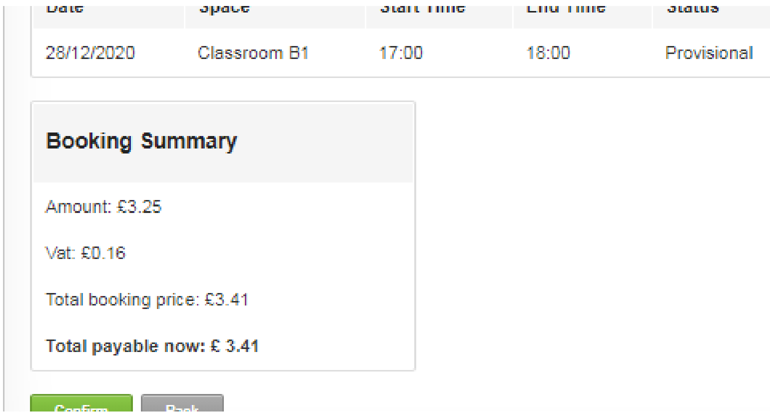
Purchase Order: 123456
Invoice GP4990
18 December, 2020

Date	Description	Space	Time	Net Cost	VAT Rate	VAT Payable	Gross Cost
18/12/2020	Badminton	Badminton Court 1	16:00 - 17:00	£10.00	5%	£0.50	£10.50
						Net Total:	**£10.00**

If you would like to get more information on how to allow clients to self-book, please contact our Customer Service team and they will more than happy to talk you through this: 01604 677764.

We have also tweaked the booking form to improve the display to both self-service and non self-service Client users. These changes include:

1. Removing the Net cost at the top of the page, and replacing with a clearer Bookings Summary at the bottom of the page. It will display the value of the booking excluding VAT, the value of the VAT, the value of the booking including the VAT, and then if applicable, the total payable now.



Date	Space	Start Time	End Time	Status
28/12/2020	Classroom B1	17:00	18:00	Provisional

Booking Summary

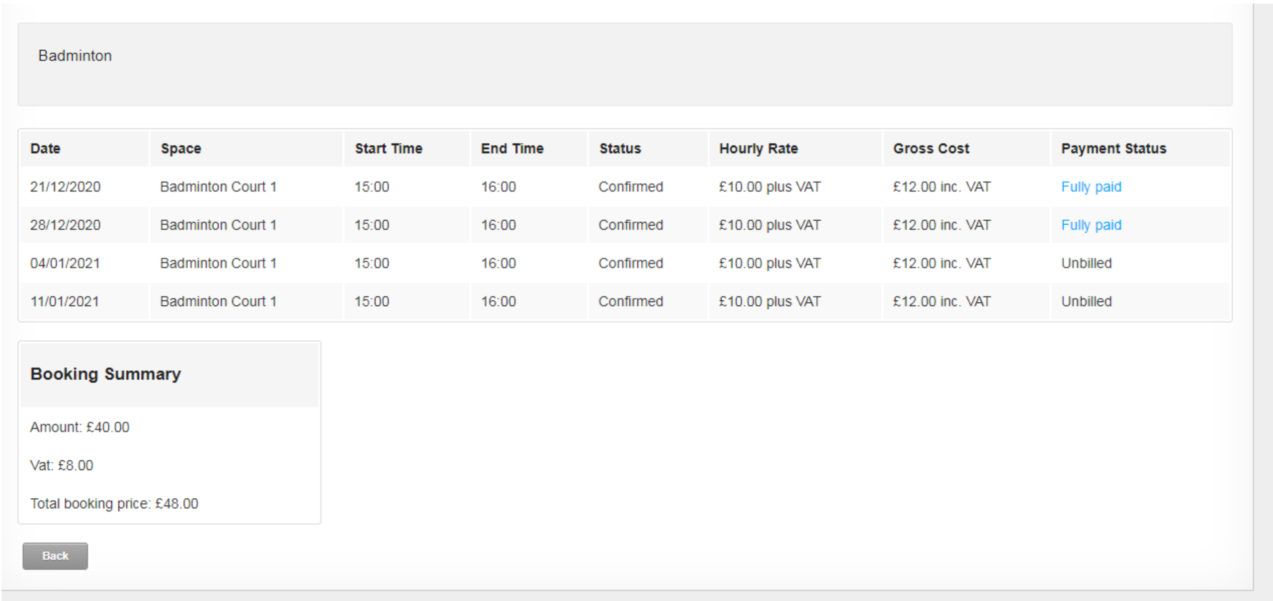
Amount: £3.25

Vat: £0.16

Total booking price: £3.41

Total payable now: £ 3.41

This then also shows confirmed bookings, without the ‘Total payable now’, and displays how much the total booking price is.



Badminton

Date	Space	Start Time	End Time	Status	Hourly Rate	Gross Cost	Payment Status
21/12/2020	Badminton Court 1	15:00	16:00	Confirmed	£10.00 plus VAT	£12.00 inc. VAT	Fully paid
28/12/2020	Badminton Court 1	15:00	16:00	Confirmed	£10.00 plus VAT	£12.00 inc. VAT	Fully paid
04/01/2021	Badminton Court 1	15:00	16:00	Confirmed	£10.00 plus VAT	£12.00 inc. VAT	Unbilled
11/01/2021	Badminton Court 1	15:00	16:00	Confirmed	£10.00 plus VAT	£12.00 inc. VAT	Unbilled

Booking Summary

Amount: £40.00

Vat: £8.00

Total booking price: £48.00

Back

2. Moving the Confirm button to the bottom of the page, to encourage client to view the whole booking and check they are happy with all of the dates before Confirming.

Booking #520011

1. Grange Park School Demo

Client: **Susi Bedford**

Telephone:

Mobile:

Email: **schoolbookings5+susib@gmail.com**

Code of Conduct for Room Hire:

* Leave hired areas clean & tidy as found
* Leave the hired area promptly for the next user
* No outdoor shoes / heels in the sports hall / gym
* Do not consume food in the sports hall / gym

Code of Conduct for Gym Membership:

* Sign in & out at reception
* Respect other users
* Report any faulty equipment to main reception

Date	Space	Start Time	End Time	Status	Hourly Rate	Gross Cost	Payment Status	Edit	Cancel
28/12/2020	Classroom B1	17:00	18:00	Provisional	£3.25 plus VAT	£3.41 inc. VAT	Unbilled	Edit	Cancel

Booking Summary

Amount: £3.25

Vat: £0.16

Total booking price: £3.41

Total payable now: £ 3.41

Confirm Back

Instant Pay Feature: Client account process for Confirming a Provisional booking

Last Modified on 09/02/2021 2:55 pm GMT

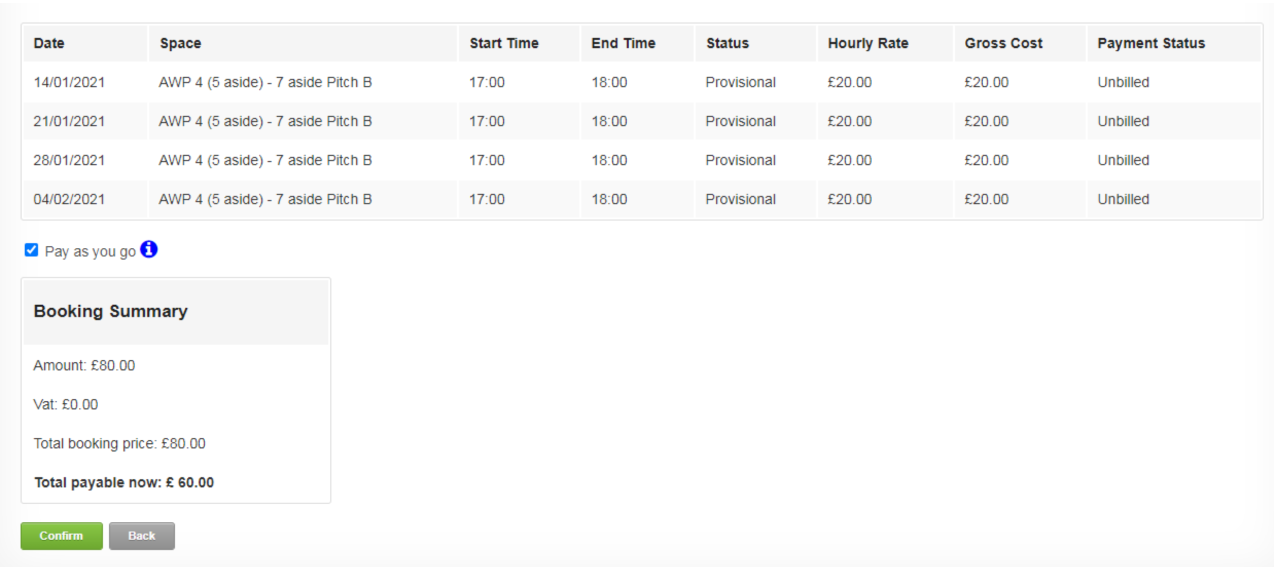
This overall process is the same for Self-Service and Non-self-service clients. However, we have underlined parts of this article that only apply to self-service clients:

When a client is confirming a Provisional booking (Booking created by an administrator) with dates within the current or for previous calendar months, both a non-self-service client or a self-service client will need to pay for those dates upfront.

If the booking starts on a future date (i.e next calendar month) they will only need to confirm the booking, but will have the option to pay in full now if they choose.

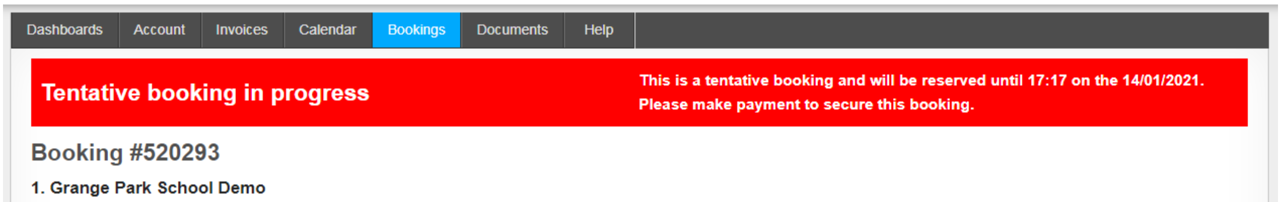
Before paying, clients will be able to see a Summary and Pay as you go option. The Pay as you go option appears on bookings that either start in the current month and recur into next month, or start in the next month. This allows clients to tick to only need to pay for bookings within this month, or to not tick, in order to pay for all of the dates up-front.

The Summary below that will then show how much the booking costs, and how much they need to pay now, in order to confirm the booking.



Date	Space	Start Time	End Time	Status	Hourly Rate	Gross Cost	Payment Status
14/01/2021	AWP 4 (5 aside) - 7 aside Pitch B	17:00	18:00	Provisional	£20.00	£20.00	Unbilled
21/01/2021	AWP 4 (5 aside) - 7 aside Pitch B	17:00	18:00	Provisional	£20.00	£20.00	Unbilled
28/01/2021	AWP 4 (5 aside) - 7 aside Pitch B	17:00	18:00	Provisional	£20.00	£20.00	Unbilled
04/02/2021	AWP 4 (5 aside) - 7 aside Pitch B	17:00	18:00	Provisional	£20.00	£20.00	Unbilled

Once the client clicks to confirm they will see that the booking has changed to Tentative

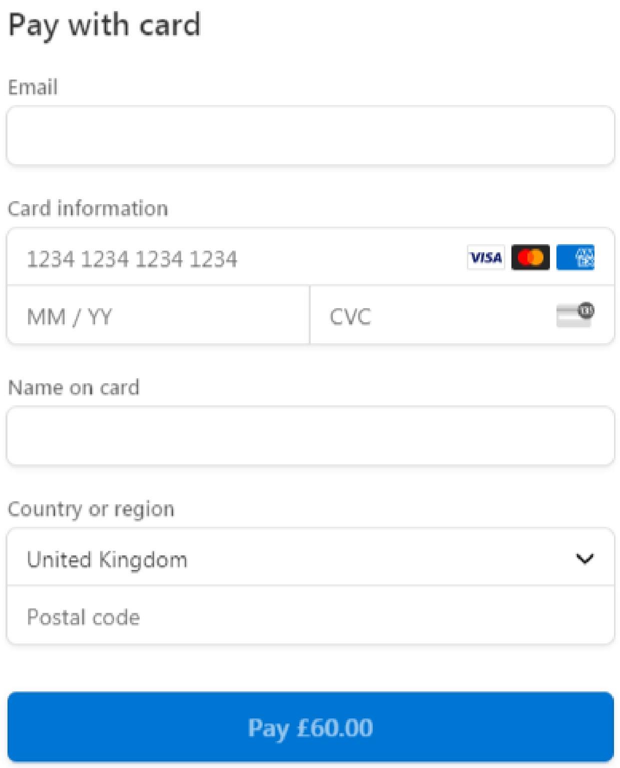


Where there are dates within this month, or if the client does not click to Pay As You Go, by clicking to pay via Stripe, a Tentative Invoice will be created and be due for payment.

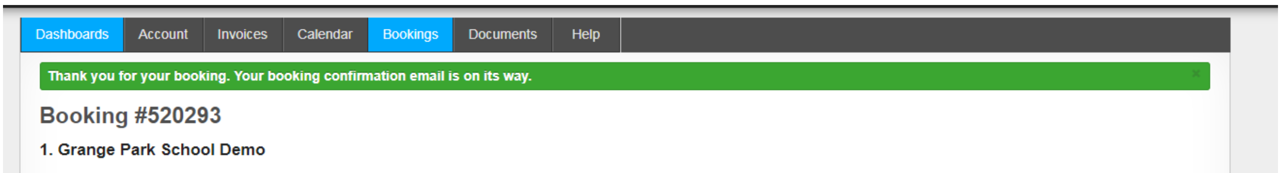
The client will have 1 hour to make the payment.

While it is unbilled, Self-service clients will be able to Edit and Cancel items, however once they click to process the payment, a tentative invoice will be automatically created for this, and they will be unable to Edit or Cancel any items.

On clicking on the Stripe payment option they will be taken to a stripe payment page to be able to enter their card details.



When the payment is made successfully, they will be taken back to their booking and will be informed that the booking is confirmed.



If the payment was unsuccessful or there was an issue with the card, Stripe will inform them on the payment page, and allow them to change their payment details. If they click back out of the Stripe page, they will see that their booking's Payment Status is Billed and can view the Tentative Invoice.

Date	Space	Start Time	End Time	Status	Hourly Rate	Gross Cost	Payment Status
14/01/2021	Astro Pitch (markings for 7aside, 9 aside & 11v11)	17:00	18:00	Tentative	£60.00	£60.00	Billed
21/01/2021	Astro Pitch (markings for 7aside, 9 aside & 11v11)	17:00	18:00	Tentative	£60.00	£60.00	Billed
28/01/2021	Astro Pitch (markings for 7aside, 9 aside & 11v11)	17:00	18:00	Tentative	£60.00	£60.00	Billed
04/02/2021	Astro Pitch (markings for 7aside, 9 aside & 11v11)	17:00	18:00	Tentative	£60.00	£60.00	Unbilled

Pay as you go

Booking Summary

Amount: £240.00

Vat: £0.00

Total booking price: £240.00

Total payable now: £ 180.00

Pay now with Stripe Back

Tentative Invoice:

Booking not confirmed

Payment is required by 17:26 on the 14/01/2021 to confirm your booking.
Please make payment to secure this booking.

1. Grange Park School Demo

12 Basset Court
Loake Close, Grange Park
Northampton
Northamptonshire
NN4 5EZ

John Smith

Invoice GP5064

14 January, 2021

Date	Description	Space	Time	Net Cost	VAT Rate	VAT Payable	Gross Cost
14/01/2021	Football	Astro Pitch (markings for 7aside, 9 aside & 11v11)	17:00 - 18:00	£60.00	0%	£0.00	£60.00
21/01/2021	Football	Astro Pitch (markings for 7aside, 9 aside & 11v11)	17:00 - 18:00	£60.00	0%	£0.00	£60.00
28/01/2021	Football	Astro Pitch (markings for 7aside, 9 aside & 11v11)	17:00 - 18:00	£60.00	0%	£0.00	£60.00
						Net Total:	**£180.00**
						VAT:	**£0.00**
						Grand total:	**£180.00**

Payment Terms

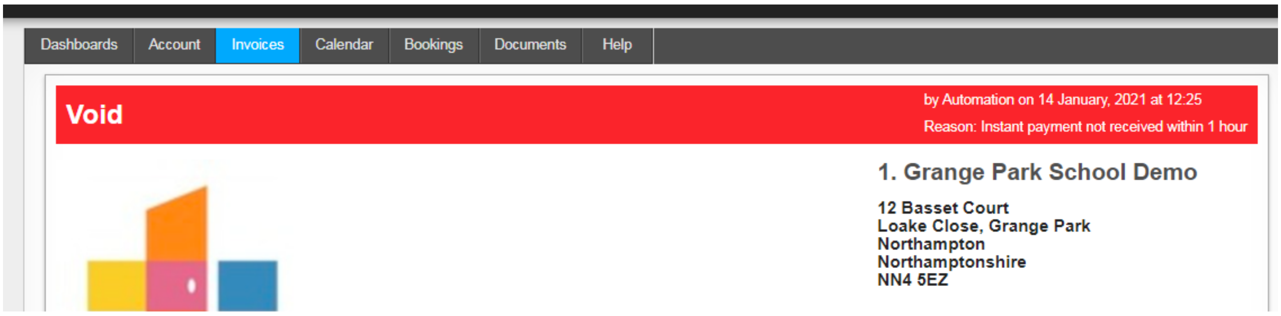
Payment due now please. Thank you for your cooperation.

Registered Office: Kajima Community, 55 Baker Street, London, W1U 8EW • Company Number: 123456 • VAT Number: 987654

£180.00 outstanding

Pay now with Stripe Print Invoice Back

After 1 hour if a Tentative invoice has not been paid it will automatically be voided, and the bookings contained within it will be returned to the Provisional status. The Voided invoice will display a message that the 'Instant payment was not received within 1 hour'. From the Bookings tab or Dashboard the client will now need to re-confirm the Booking in order to process the payment again.

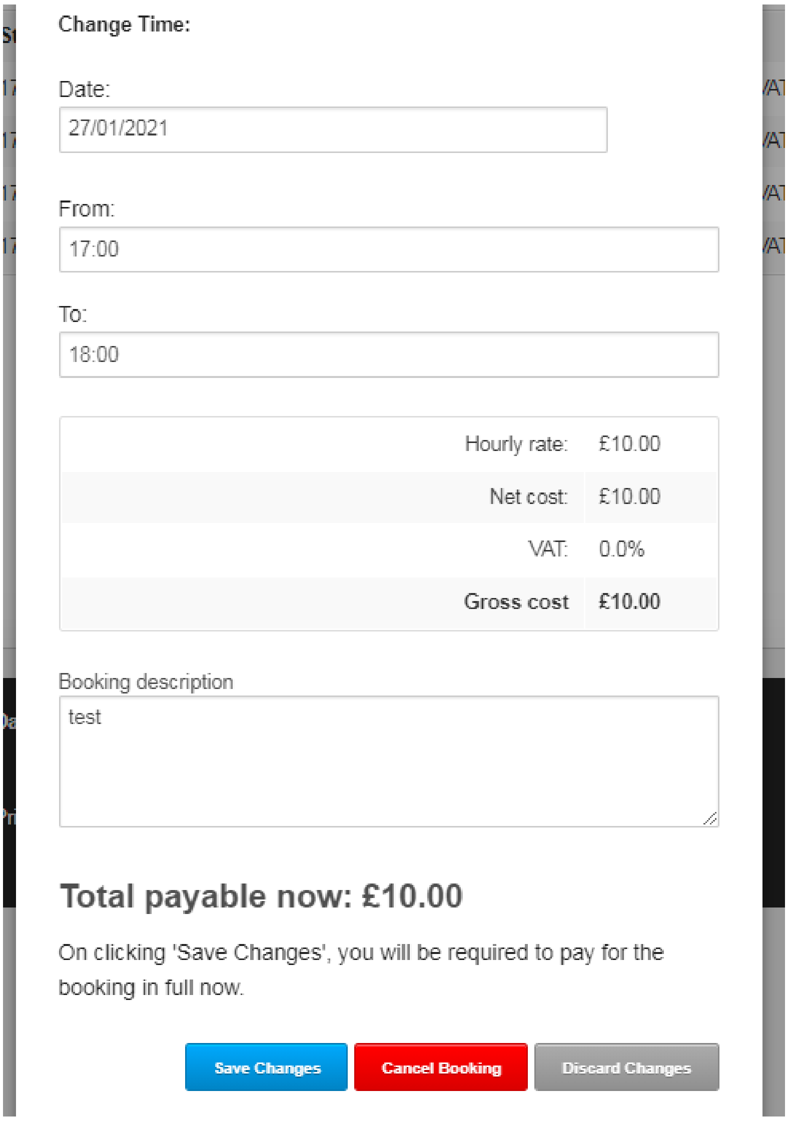


Once the booking has been processed, the client user that Confirmed the booking and any Client Users attached to the account with the email setting 'Booking' selected will receive a Booking confirmation email. The contents of the email will depend on what is populated in the Email template.

If at your venue you have the option selected to receive emails once the client confirms their booking, you will also receive an email notification. See our article on setting up instant pay at your venue for more information on checking this here.

Note regarding Self-service clients editing bookings:

If a self-service client has a booking for a future month and Payment was not made when confirming, if they then they want to edit the booking to be in the current month, they will see a message instructing them that the changes will mean that they have to pay for the booking now. If they save the booking an invoice will be created, and be due for payment.



If you would like to get more information on how to allow clients to self-book at your Venue, please contact our customer service team and they will more than happy to talk you through the set-up process: 01604 677764.

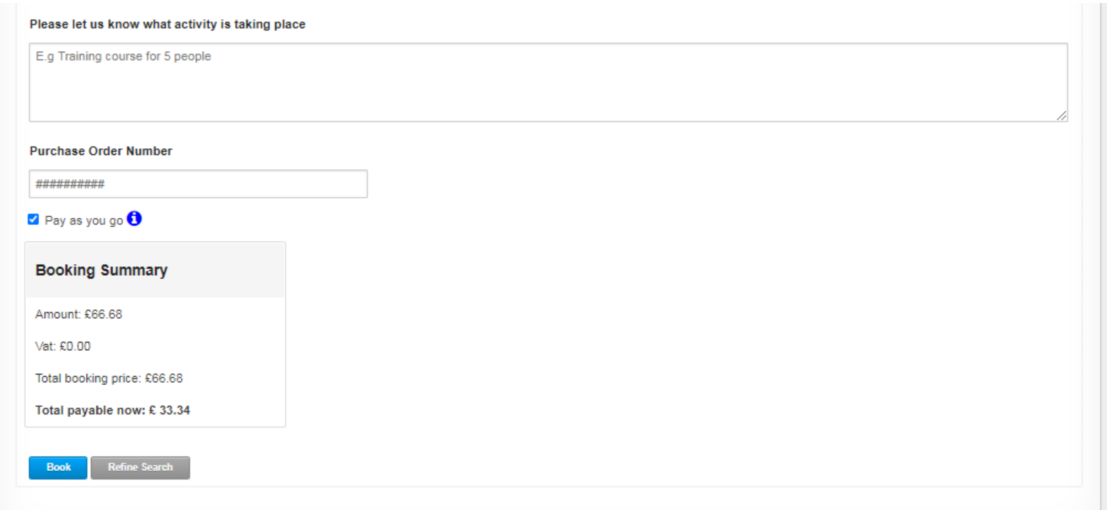
Instant Pay Feature: Client account process for Creating a Tentative booking

Last Modified on 09/02/2021 2:55 pm GMT

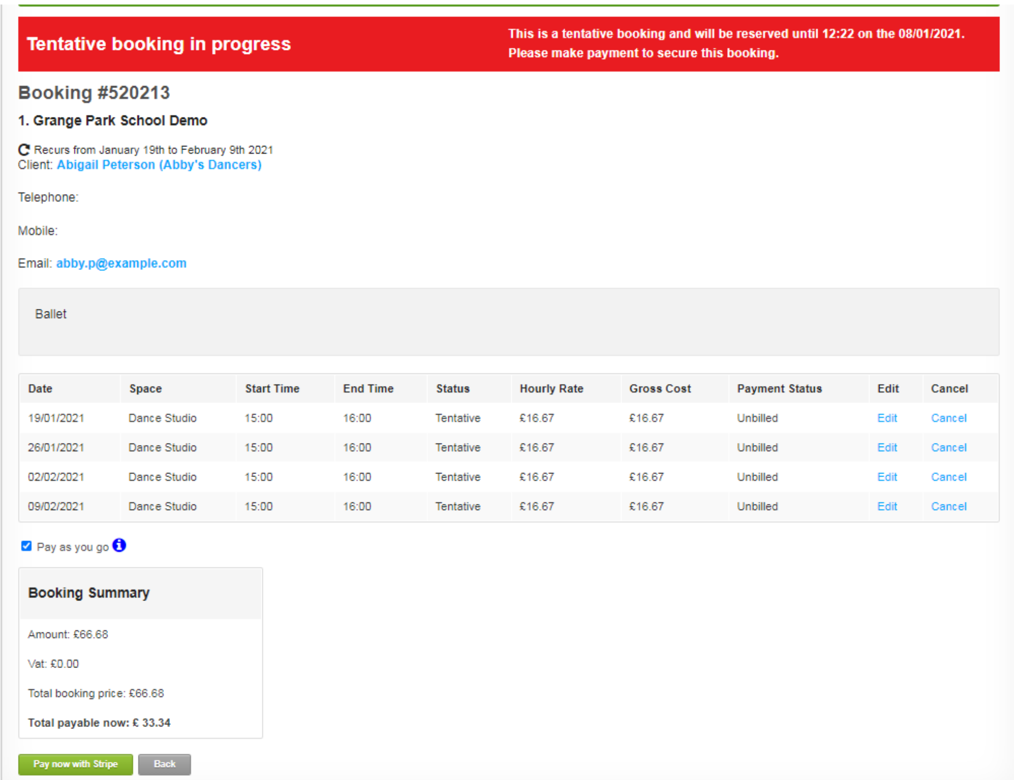
Please take a look at our article General Client Account Upgrade first, to understand the changes in the process flow of making bookings from the calendar.

Before paying for bookings, clients will be able to see a Summary of the costs, and on some bookings a Pay as you go option. The Pay as you go option appears on bookings that either start in the current month and recur into a future month, or start in a future month. If the Pay as you go option is not ticked, the client will need to pay in full for the booking. If the Pay as you go option is ticked the client will need to pay for any bookings within the current calendar month, in order to confirm the whole booking.

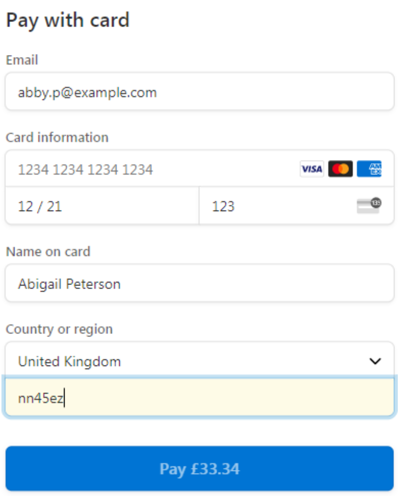
The Summary below that will then show how much the booking costs, and how much they need to pay now, in order to complete the booking.



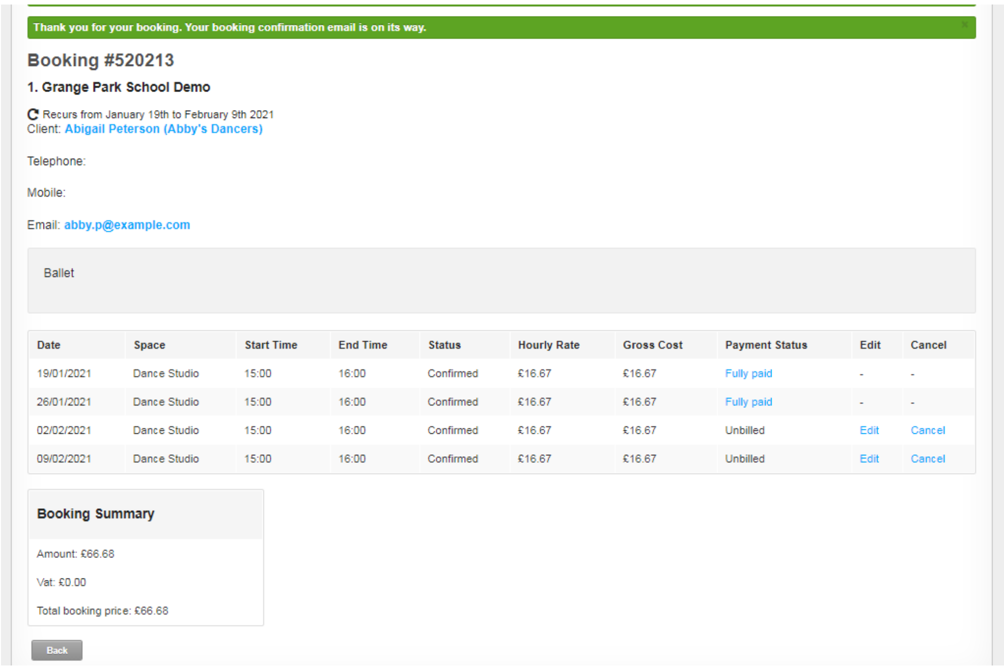
When a client clicks to 'Book', a tentative booking will be created and this will be reserved for the client for 1 hour (the expiry time). Whilst it is unbilled, they will be able to Edit and Cancel items (see below), however once they click to pay, a Tentative invoice will be automatically created for this, and they will be unable to Edit or Cancel items at this stage, as they have committed to the booking/payment.



On clicking to pay, they will be taken to a Stripe payment page, to be able to enter their card details.



When the payment is made and successful, they will be taken back to their booking and will be informed that their booking is now confirmed.



Thank you for your booking. Your booking confirmation email is on its way.

Booking #520213

1. Grange Park School Demo

Recurs from January 19th to February 9th 2021
Client: Abigail Peterson (Abby's Dancers)

Telephone:

Mobile:

Email: abby.p@example.com

Ballet

Date	Space	Start Time	End Time	Status	Hourly Rate	Gross Cost	Payment Status	Edit	Cancel
19/01/2021	Dance Studio	15:00	16:00	Confirmed	£16.67	£16.67	Fully paid	-	-
26/01/2021	Dance Studio	15:00	16:00	Confirmed	£16.67	£16.67	Fully paid	-	-
02/02/2021	Dance Studio	15:00	16:00	Confirmed	£16.67	£16.67	Unbilled	Edit	Cancel
09/02/2021	Dance Studio	15:00	16:00	Confirmed	£16.67	£16.67	Unbilled	Edit	Cancel

Booking Summary

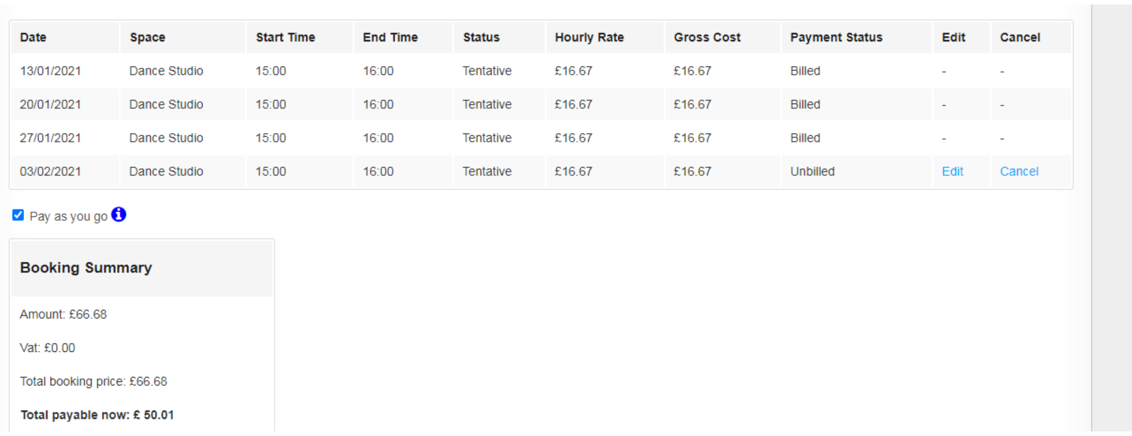
Amount: £66.68

Vat: £0.00

Total booking price: £66.68

Back

If the payment was unsuccessful or there was an issue with the card, Stripe will inform them on the payment page, and allow them to change their payment details. If they click back out of the Stripe page, they will see that their booking is Tentative and can view the Tentative Invoice.



Date	Space	Start Time	End Time	Status	Hourly Rate	Gross Cost	Payment Status	Edit	Cancel
13/01/2021	Dance Studio	15:00	16:00	Tentative	£16.67	£16.67	Billed	-	-
20/01/2021	Dance Studio	15:00	16:00	Tentative	£16.67	£16.67	Billed	-	-
27/01/2021	Dance Studio	15:00	16:00	Tentative	£16.67	£16.67	Billed	-	-
03/02/2021	Dance Studio	15:00	16:00	Tentative	£16.67	£16.67	Unbilled	Edit	Cancel

Pay as you go

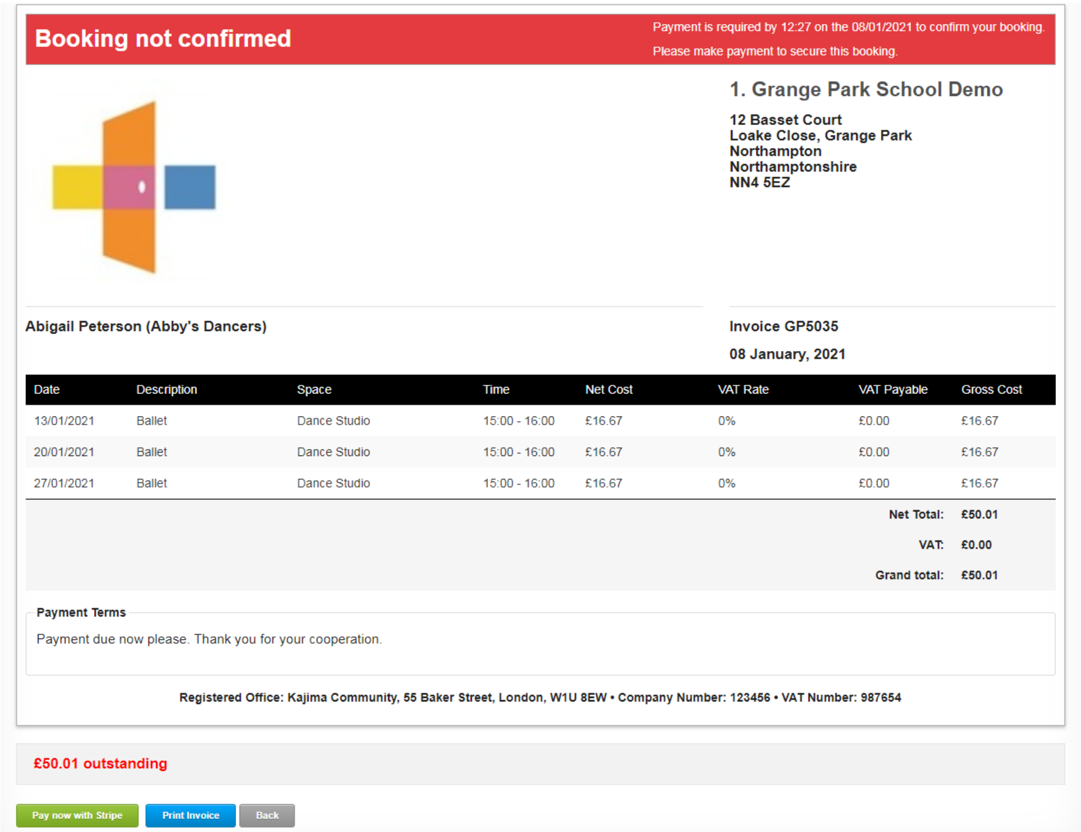
Booking Summary

Amount: £66.68

Vat: £0.00

Total booking price: £66.68

Total payable now: £ 50.01



Booking not confirmed

Payment is required by 12:27 on the 08/01/2021 to confirm your booking.
Please make payment to secure this booking.

1. Grange Park School Demo

12 Basset Court
Loake Close, Grange Park
Northampton
Northamptonshire
NN4 5EZ

Abigail Peterson (Abby's Dancers)

Invoice GP5035

08 January, 2021

Date	Description	Space	Time	Net Cost	VAT Rate	VAT Payable	Gross Cost
13/01/2021	Ballet	Dance Studio	15:00 - 16:00	£16.67	0%	£0.00	£16.67
20/01/2021	Ballet	Dance Studio	15:00 - 16:00	£16.67	0%	£0.00	£16.67
27/01/2021	Ballet	Dance Studio	15:00 - 16:00	£16.67	0%	£0.00	£16.67
						Net Total:	£50.01
						VAT:	£0.00
						Grand total:	£50.01

Payment Terms

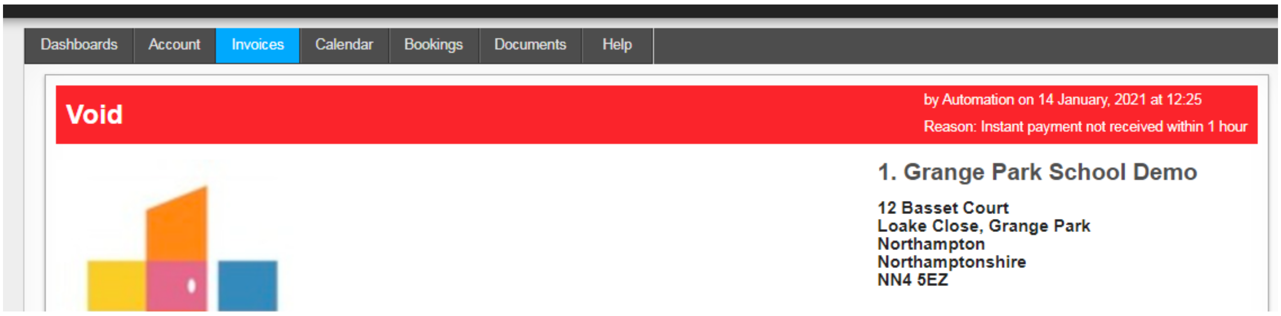
Payment due now please. Thank you for your cooperation.

Registered Office: Kajima Community, 55 Baker Street, London, W1U 8EW • Company Number: 123456 • VAT Number: 987654

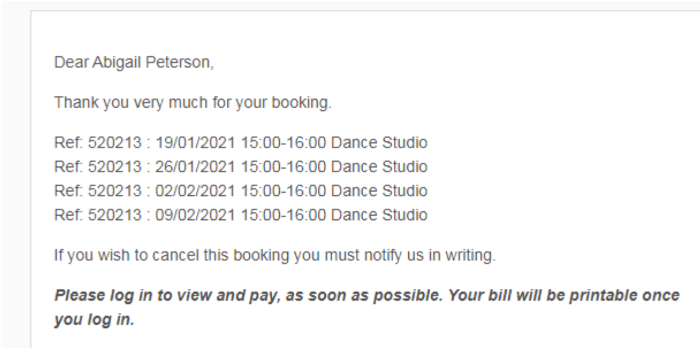
£50.01 outstanding

Pay now with Stripe | Print Invoice | Back

After 1 hour if a Tentative invoice has not been paid it will automatically be voided and the bookings contained within it will be cancelled. The Voided invoice will display a message that the ‘Instant payment was not received within 1 hour’. From the Bookings tab or calendar any client will now be able to book that slot/time.



Once the booking has been processed, the client user that Confirmed the booking and any Client Users attached to the account with the email setting 'Booking' selected will receive a Booking confirmation email. (The below is an example template, to amend email text go to Manage Tab-Edit Venue-Emails-**Booking Confirmation Email**)



Dear Abigail Peterson,

Thank you very much for your booking.

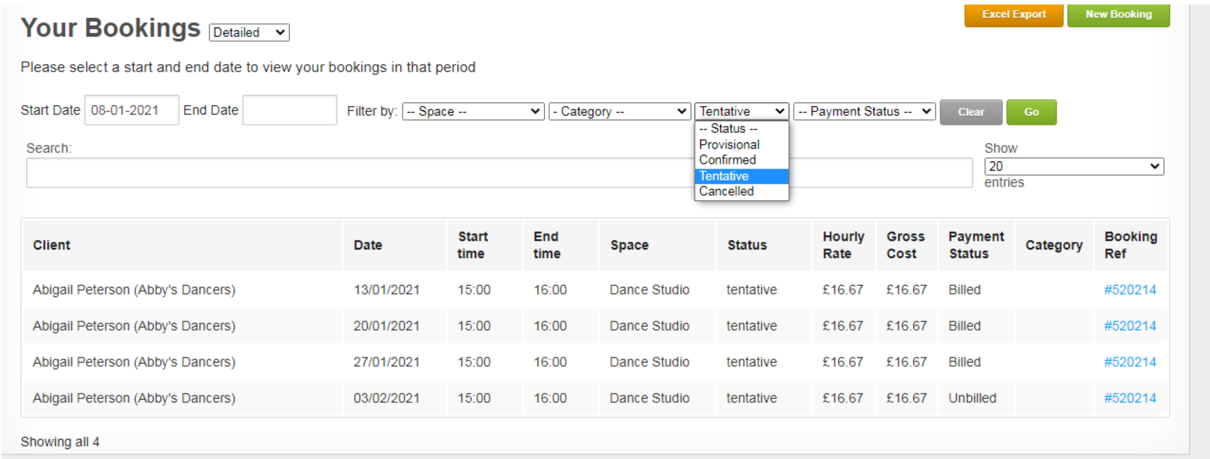
Ref: 520213 : 19/01/2021 15:00-16:00 Dance Studio
Ref: 520213 : 26/01/2021 15:00-16:00 Dance Studio
Ref: 520213 : 02/02/2021 15:00-16:00 Dance Studio
Ref: 520213 : 09/02/2021 15:00-16:00 Dance Studio

If you wish to cancel this booking you must notify us in writing.

Please log in to view and pay, as soon as possible. Your bill will be printable once you log in.

If at your venue you have the option selected to receive emails once the client confirms their booking, you will also receive an email notification. See our article on setting up instant pay at your venue for more information on checking this here.

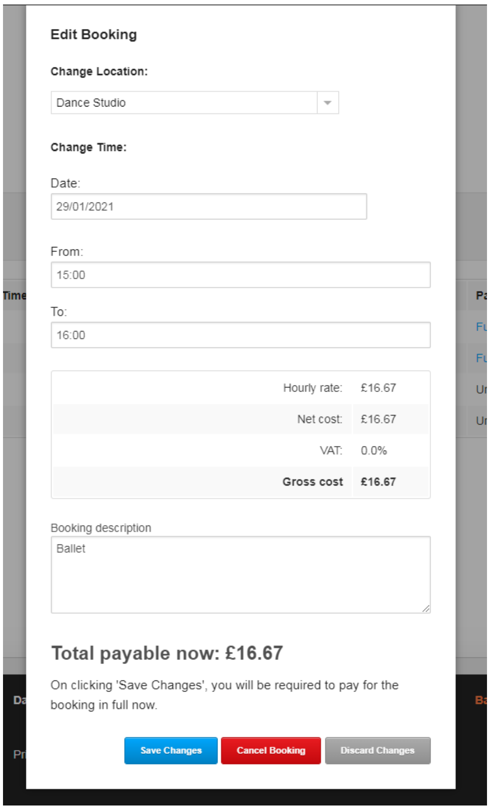
Also, from the bookings tab clients will now have a Tentative option within the Status filter, allowing them to quickly spot any remaining tentative bookings that require action or any being processed.



Client	Date	Start time	End time	Space	Status	Hourly Rate	Gross Cost	Payment Status	Category	Booking Ref
Abigail Peterson (Abby's Dancers)	13/01/2021	15:00	16:00	Dance Studio	tentative	£16.67	£16.67	Billed		#520214
Abigail Peterson (Abby's Dancers)	20/01/2021	15:00	16:00	Dance Studio	tentative	£16.67	£16.67	Billed		#520214
Abigail Peterson (Abby's Dancers)	27/01/2021	15:00	16:00	Dance Studio	tentative	£16.67	£16.67	Billed		#520214
Abigail Peterson (Abby's Dancers)	03/02/2021	15:00	16:00	Dance Studio	tentative	£16.67	£16.67	Unbilled		#520214

Showing all 4

If a self-service client has a booking for a future month and Payment was not made when confirming, if they then they want to edit the booking to be in the current month, they will see a message instructing them that the changes will mean that they have to pay for the booking now. If they save the booking an invoice will be created, and be due for payment.



Edit Booking

Change Location:

Dance Studio

Change Time:

Date:
29/01/2021

From:
15:00

To:
16:00

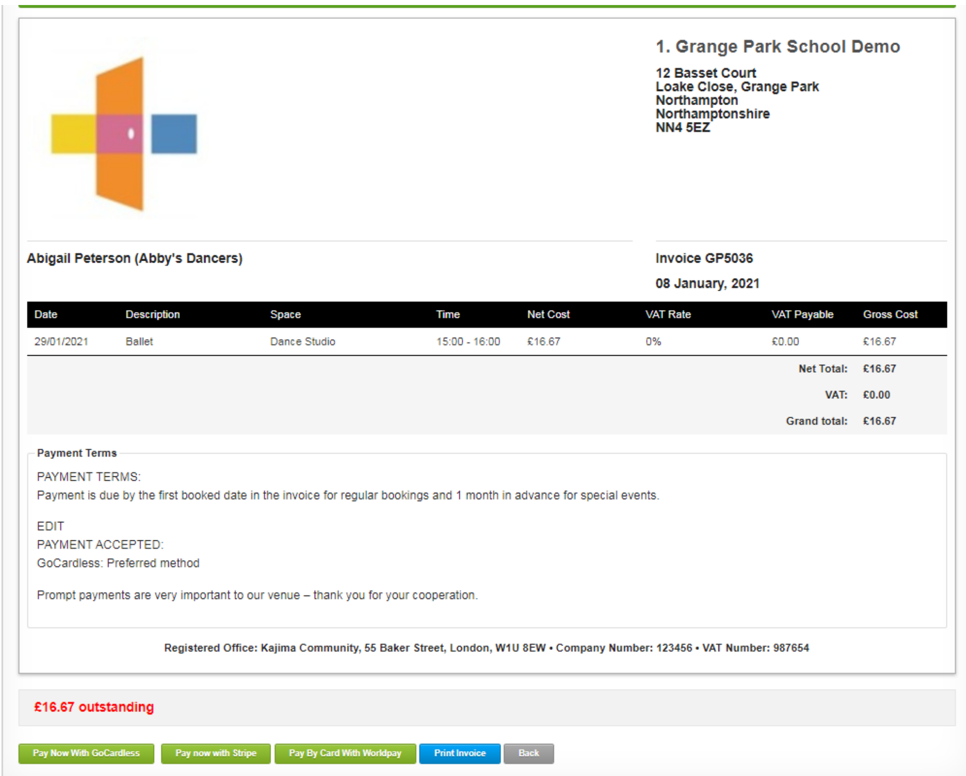
Hourly rate:	£16.67
Net cost:	£16.67
VAT:	0.0%
Gross cost	**£16.67**

Booking description
Ballet

Total payable now: £16.67

On clicking 'Save Changes', you will be required to pay for the booking in full now.

Save Changes | Cancel Booking | Discard Changes



1. Grange Park School Demo

12 Basset Court
Loake Close, Grange Park
Northampton
Northamptonshire
NN4 5EZ

Abigail Peterson (Abby's Dancers)

Invoice GP5036

08 January, 2021

Date	Description	Space	Time	Net Cost	VAT Rate	VAT Payable	Gross Cost
29/01/2021	Ballet	Dance Studio	15:00 - 16:00	£16.67	0%	£0.00	£16.67
						Net Total:	**£16.67**
						VAT:	**£0.00**
						Grand total:	**£16.67**

Payment Terms

PAYMENT TERMS:
Payment is due by the first booked date in the invoice for regular bookings and 1 month in advance for special events.

EDIT
PAYMENT ACCEPTED:
GoCardless: Preferred method

Prompt payments are very important to our venue – thank you for your cooperation.

Registered Office: Kajima Community, 55 Baker Street, London, W1U 8EW • Company Number: 123456 • VAT Number: 987654

£16.67 outstanding

Pay Now With GoCardless | Pay now with Stripe | Pay By Card With Worldpay | Print Invoice | Back