

Overview - Dashboard

Last Modified on 11/09/2023 11:44 am 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

Tuesday 27 March, 2018

- 14:45 - Stacey McGeorge created a [booking](#) for Bennion
- 14:38 - Stacey McGeorge created a [booking](#) for Bennion
- 14:31 - Stacey McGeorge created a [booking](#) for Bennion
- 14:12 - Stacey McGeorge created a [booking](#) for Bennion
- 13:59 - Stacey McGeorge created a [booking](#) for Bennion

Monday 26 March, 2018

- 14:19 - Amberley Kent created a [booking](#) for Jakes Badminton
- 14:19 - [Enquiry](#) from Jake Jones updated by Amberley Kent
- 14:16 - [Enquiry](#) from Jake Jones updated by Amberley Kent
- 14:15 - [Enquiry](#) from Jake Jones updated by Amberley Kent
- 14:14 - [Enquiry](#) from Jake Jones updated by Amberley Kent
- 14:13 - [Enquiry](#) from Jake Jones updated by Amberley Kent
- 14:12 - [Enquiry](#) from Jake Jones updated by Amberley Kent
- 14:09 - [Enquiry](#) received from Jake Jones
- 11:10 - Good Space Hosts created a [booking](#) for FC Badminton

Friday 23 March, 2018

- 14:26 - Good Space Hosts confirmed a [booking](#) for Singing to win

1177 Invoices due for payment [See all invoices](#)

Invoice (Client)	Value	Reminder	
GP1150 (H6FC)	£180.00	None	Send Reminder
GP1682 (Private Party)	£103.12	None	Send Reminder
GP1151 (Haringey)	£30.00	None	Send Reminder
GP1175 (Hathershaw)	£100.00	None	Send Reminder
GP1238 (Carroll FC)	£116.00	None	Send Reminder
GP1127 (bubble football)	£60.00	None	Send Reminder
GP1441 (Hathershaw)	£15.00	29/04/2016	Send Reminder

17 Payments require attention Use the tick box to mark an action on a payment

Message (Client)	Status	
<input type="checkbox"/> Payment mandate requires double signatures to b... (InVision)	pending	View
<input type="checkbox"/> Payment mandate requires double signatures to b...(Susi B Tennis Coaching)	pending	View
<input type="checkbox"/> Payment mandate requires double signatures to b...(Susi B Tennis Coaching)	pending	View

37 Provisional bookings (next 30 days) [See all bookings](#)

Client	Value	
Jackies Food-Aholics	£72	View
Ballet England	£80	View
David Taylor Boxing Training	£105	View
Ballet England	£80	View
Little Lunchers	£250	View
Polish Language School	£150	View
FC Badminton	£75	View

Value of bookings

£202,357
Since 01 Jul 2017

£7,528
in January

£31,726
in February

£31,269
in March

(ex. VAT)

7 Bookings due for renewal [See all bookings](#)

Client	Booking Dates	
<input checked="" type="checkbox"/> North Pole FC	November 27th to March 29th	View
<input type="checkbox"/> Birthday Party	February 12th to April 2nd	View
<input type="checkbox"/> Susi B Tennis Coaching	March 1st to March 29th	View
<input type="checkbox"/> Foxyards Primary School	March 1st to March 29th	View
<input type="checkbox"/> CBeebies	March 7th to April 4th	View
<input type="checkbox"/> Boop	March 14th to April 4th	View

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!
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