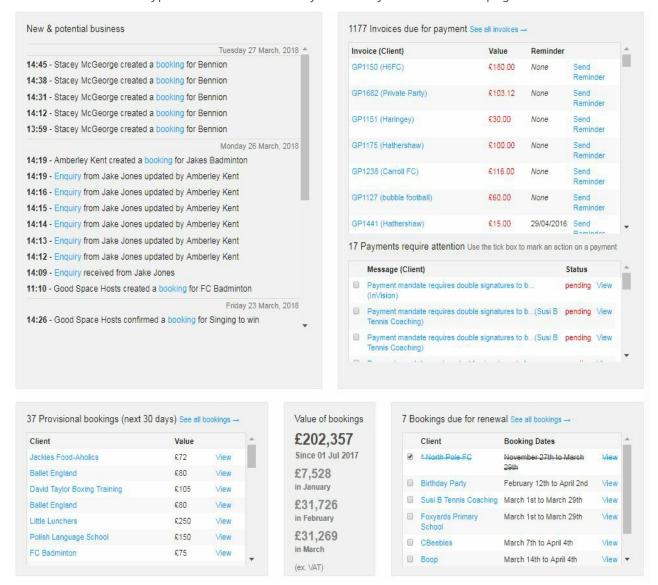
Overview - Dashboard

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 Rusiness

- 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 articlePayments 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 seeAmend '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!