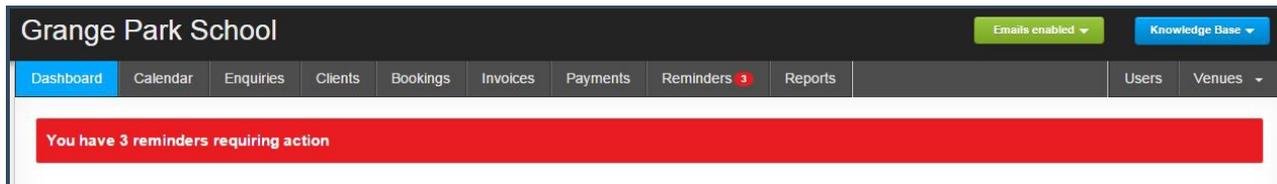


Using reminders

Last Modified on 14/01/2021 3:36 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 [Create a Reminder](#) 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)

Grange Park School Emails enabled Knowledge Base

Dashboard Calendar Enquiries Clients Bookings Invoices Payments **Reminders 3** Reports Users Venues

Reminders

Filter by: Pending -- Type -- Start Date: End Date:

Search: Show entries

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.