

Checklists - how to set up & use

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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.

The screenshot displays the 'Manage' section of the BookingsPlus interface. At the top, there is a navigation bar with tabs for Dashboard, Calendar, Enquiries, Clients, Bookings, Invoices, Payments, Reminders (23), Reports, Users, Manage, and Venues. Below the navigation bar are three buttons: Import Data, Edit Website, and Edit Venue. The main content area is divided into several sections:

- Venue Management:** Includes links for Venue Management, Website Marketing, and Website Blog (Master Admin Only).
- Venue Registration:** A notification box stating 'Venue registration completed and terms accepted on 08/04/2013 08:44' with a link to 'View registration details'.
- Booking Checklists:** A table listing four checklists with their respective item counts and booking numbers.
- Holidays:** A table listing various holidays with their start and end dates, and edit/delete options.
- Closures:** A section with a table for recording closures, including a reason, start, and end date.

Name	Items	Bookings		
Gym Membership Checklist	5 Edit	15	Edit	Delete
New Regular Booking Checklist	7 Edit	222	Edit	Delete
Special Events Checklist	8 Edit	27	Edit	Delete
Theatre Checklist	9 Edit	6	Edit	Delete

Description	Start	End		
Christmas and New Year	21/12/2016	01/01/2017	Edit	Delete
February Half Term	13/02/2017	19/02/2017	Edit	Delete
Easter Holiday	10/04/2017	23/04/2017	Edit	Delete
test	15/05/2017	16/05/2017	Edit	Delete
May Holiday	29/05/2017	04/06/2017	Edit	Delete
Summer Holiday	24/07/2017	03/09/2017	Edit	Delete
October Half term	30/10/2017	05/11/2017	Edit	Delete

Reason	Start	End		
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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.

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

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.

New Booking

Booking Query

Select client: John James (Grange Park FC (WK)) or **Add a new client**

Purchase order: Category: Sport & Fitness Checklist: ---

Spaces

Space: 1. Venue Notes Booked: --- VAT: 20% Gross: £ 0.00 **Add another space**

Sundry Items **Add Sundry**

 Gym Membership Checklist
 New Regular Booking Checklist
 Special Events 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.

Dashboard | Calendar | Enquiries | Clients | **Bookings** | Invoices | Payments | Reminders 8 | Reports

You have a reminder set for this booking for 18/0

Booking #93932 - Football - ki

Category: Sport & Fitness
Cost: £378.00
 Recurs from May 17th to July 19th 2016

Complete Checklist: New Regular Booking Checklist - 3/7 rem

Client: **John James (Grange Park FC (WK))**
 Telephone: **01604 675849**

Administrator Notes
None

FM Notes - shown on activity sheets
Floodlights

Client Notes - shown on client login

Code of Conduct for Room Hire:

New Regular Booking Checklist

1.	<input checked="" type="checkbox"/>	Have stated on clients notes & Fm notes anything included in booking eg, U shape set up, jug of water	Actioned by Tracy Trainer 01/06/2016
2.	<input checked="" type="checkbox"/>	Terms & Conditions have been accepted online	Actioned by Tracy Trainer 01/06/2016
3.	<input checked="" type="checkbox"/>	Booking has been confirmed by the hirer online	Actioned by Tracy Trainer 01/06/2016
4.	<input type="checkbox"/>	Have let site team know about new booking & start date	--
5.	<input type="checkbox"/>	Have booked an induction meeting with site team 1/2 hour prior to 1st booking to go through fire evacs etc	--
6.	<input type="checkbox"/>	Have obtained relevant documentation eg, insurance, DBS, qualifications etc	--
7.	<input type="checkbox"/>	Published to website	--

[Close](#)

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.

Dashboard | Calendar | Enquiries | Clients | **Bookings** | Invoices | Payments | Reminders 8 | Reports | Users | Manage | Venues

Bookings New Booking | Excel Export

Filter by: Space (41) | Category -- | Status -- | Payment Status -- | Start Date: 01-06-2016 | End Date: 01-07-2016 | Clear | Go | Cancel selected

Search: Show 20 entries

2/7	<input type="checkbox"/>	07/06/2016	17:00	18:00	Senior Football Pitch 2	John James (Grange Park FC (WK))	£45.00	Sport & Fitness	confirmed	Fully paid	#86978	Edit
3/7	<input type="checkbox"/>	07/06/2016	17:00	18:00	AWP 3 (5-6 aside)	John James (Grange Park FC (WK))	£35.00	Sport & Fitness	confirmed	Billed	#93932	Edit
7/7	<input type="checkbox"/>	08/06/2016	17:00	18:00	Badminton Court 1	John James (Grange Park FC (WK))	£7.50	Sport & Fitness	confirmed	Fully paid	#89179	Edit
	<input type="checkbox"/>	08/06/2016	17:00	18:00	AWP 1 (5-6 aside)	John James (Grange Park FC (WK))	£25.00	Sport & Fitness	confirmed	Fully paid	#91918	Edit
7/7	<input type="checkbox"/>	09/06/2016	17:00	18:00	Senior Football Pitch 2	John James (Grange Park FC (WK))	£45.00	Sport & Fitness	confirmed	Fully paid	#86974	Edit
	<input type="checkbox"/>	09/06/2016	19:45	20:45	Badminton Court 4	John James (Grange Park FC (WK))	£7.50		confirmed	Fully paid	#89441	Edit
	<input type="checkbox"/>	09/06/2016	19:45	20:45	Badminton Court 3	John James (Grange Park FC (WK))	£7.50		confirmed	Fully paid	#89441	Edit
3/7	<input type="checkbox"/>	14/06/2016	17:00	18:00	AWP 3 (5-6 aside)	John James (Grange Park FC (WK))	£35.00	Sport & Fitness	confirmed	Billed	#93932	Edit
2/7	<input type="checkbox"/>	14/06/2016	17:00	18:00	Senior Football Pitch 2	John James (Grange Park FC (WK))	£45.00	Sport & Fitness	confirmed	Fully paid	#86978	Edit

For examples of checklists click here [Suggested checklists](#)
