Checklists - how to set up & use
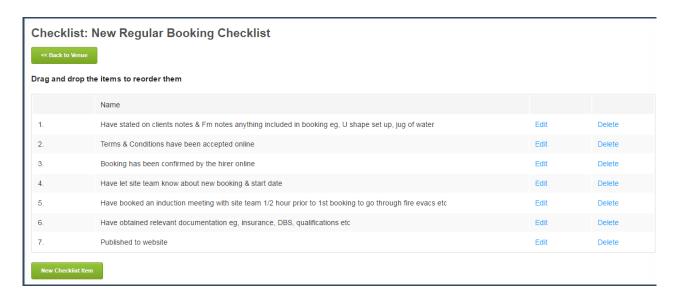
Within BookingsPlus is the option to attach a checklist to a booking. These checklists are bespoke to your venue & are designed to guide you through the steps involved when taking a new booking, ensuring that nothing is missed. Combined with the reminders, this can be a valuable tool to running your 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.

Checklist: New Regular Booking Checklist

<< Back to Venue

Drag and drop the items to reorder them

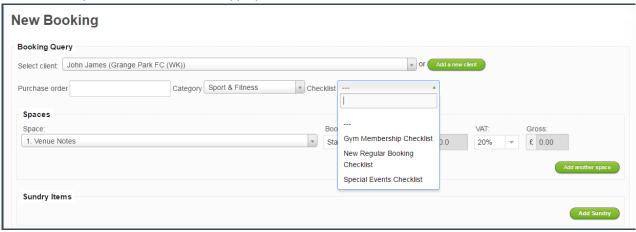|	Name		
1.	Have stated on clients notes & Fm notes anything included in booking eg, U shape set up, jug of water	Edit	Delete
2.	Terms & Conditions have been accepted online	Edit	Delete
3.	Booking has been confirmed by the hirer online	Edit	Delete
4.	Have let site team know about new booking & start 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,
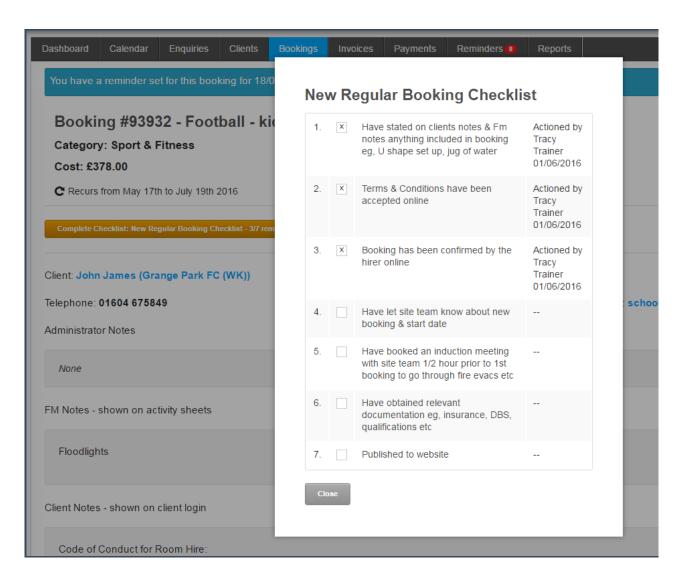
click on   New Checklist Item

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 ---

---
Gym Membership Checklist
New Regular Booking Checklist
Special Events Checklist

Spaces

Space:
1. Venue Notes

VAT: Gross:
20%   £ 0.00

Add another space

Sundry Items

Add Sundry

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](#)