

# Suggested checklists

Last Modified on 03/02/2021 5:54 pm GMT

Below are examples of 3 checklists which we use for our BookingsGuru service. These are based on our experience of lettings & designed to be generic to fit to most situations. Please feel free to copy these & amend to suit your working practices.

## Checklist: New Regular Booking Checklist

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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	<a href="#">Edit</a>	<a href="#">Delete</a>
2.	Terms & Conditions have been accepted online	<a href="#">Edit</a>	<a href="#">Delete</a>
3.	Booking has been confirmed by the hirer online	<a href="#">Edit</a>	<a href="#">Delete</a>
4.	Have let site team know about new booking & start date	<a href="#">Edit</a>	<a href="#">Delete</a>
5.	Have booked an induction meeting with site team 1/2 hour prior to 1st booking to go through fire evacs etc	<a href="#">Edit</a>	<a href="#">Delete</a>
6.	Have obtained relevant documentation eg, insurance, DBS, qualifications etc	<a href="#">Edit</a>	<a href="#">Delete</a>
7.	Published to website	<a href="#">Edit</a>	<a href="#">Delete</a>

[New Checklist Item](#)

## Checklist: Children's Party Checklist

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Drag and drop the items to reorder them

	Name		
1.	Have stated on client & FM notes: Access to hot/cold water to be supplied, tables & chairs for xx children, any additional requirements	<a href="#">Edit</a>	<a href="#">Delete</a>
2.	T&C's accepted online	<a href="#">Edit</a>	<a href="#">Delete</a>
3.	Booking confirmed by the hirer	<a href="#">Edit</a>	<a href="#">Delete</a>
4.	Details of any external suppliers (eg bouncy castle, entertainer)	<a href="#">Edit</a>	<a href="#">Delete</a>
5.	PAT Certificates/Insurance have been obtained where relevant	<a href="#">Edit</a>	<a href="#">Delete</a>
6.	Let site team know numbers for party & times of collection/delivery of bouncy castles (at least 2 wks prior)	<a href="#">Edit</a>	<a href="#">Delete</a>
7.	Number & age of children have been confirmed (at least 1 wk prior)	<a href="#">Edit</a>	<a href="#">Delete</a>
8.	Payment received in full at least 5 days prior to party	<a href="#">Edit</a>	<a href="#">Delete</a>
9.	Send feedback form to hirer	<a href="#">Edit</a>	<a href="#">Delete</a>

[New Checklist Item](#)

## Checklist: Special Events Checklist

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Drag and drop the items to reorder them

	Name		
1.	Official quote sent with terms attached	Edit	Delete
2.	Deposit received (50% for special events)	Edit	Delete
3.	State on client & FM notes anything included in booking, eg use of projector, banqueting tables/chairs to seat xx, etc	Edit	Delete
4.	T&C's accepted online	Edit	Delete
5.	Booking confirmed by the hirer	Edit	Delete
6.	Event planner completed & sent to site team	Edit	Delete
7.	Event planning meeting booked between site team & hirer (at least 2 months prior to event)	Edit	Delete
8.	Complete catering staff request (if kitchens required) and sent to Catering Academy	Edit	Delete
9.	Send kitchen terms to hirer (if kitchens booked)	Edit	Delete
10.	Equipment list with PAT certificates must be obtained	Edit	Delete
11.	Obtain insurance documents (for caterers as well where relevant)	Edit	Delete
12.	Raise invoice 2 months prior to event	Edit	Delete
13.	Receive full payment 1 month prior to event	Edit	Delete
14.	Phone hirer to confirm event times, numbers & final details 2 wks prior to event.	Edit	Delete
15.	Phone site team to confirm final numbers & check event is staffed	Edit	Delete
16.	Send deposit back after receiving all clear from post event checks	Edit	Delete
17.	Send feedback form to hirer	Edit	Delete

New Checklist Item

BookingsGuru is a service that we provide to schools and community facilities where we provide the admin and marketing for their lettings.

<https://bookingsguru.co.uk/>