

Your 3 key steps to mastering BookingsPlus

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3 Key Steps to Mastering BookingsPlus

Hi ,

By now you have likely [logged into BookingsPlus](#) and began exploring your online booking system. Here you will find a variety of features at your disposal, all designed to help you manage your lettings efficiently and effectively.

This guide focuses on the three key features you are likely to use frequently which once mastered will help you further unlock your venue's potential.

1 CLIENTS

The *Clients* tab found on your dashboard within BookingsPlus, is where you store data for each individual hirer of your facilities. A client record contains everything from contact details to documentation, bookings and payment history.

Every new booking placed within BookingsPlus must be assigned to a client record.

New clients can be created in a variety of ways including;

From a website enquiry, when adding a new booking and via the *Clients* tab using the button [\[New Client\]](#). All existing client data is also accessible to you from the *Clients* tab.

Once a client record has been created, additional options are available both to you as an administrator and the hirer, who will gain access to their own dedicated *Client Account*. You can [learn more here](#).



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2 BOOKINGS

A booking is an entry into BookingsPlus to reserve the availability of a bookable space within a specific time frame for



an individual hirer. E.g. John Smith, Sports Hall, 03/02/2021, 4pm-6pm.

Bookings are typically generated in two stages; provisional and confirmed, the latter of which will enable you to later invoice the hirer for use of your facilities.

Our Help & Support guides comprehensively review the booking journey and are [available for you to study here](#).



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3 INVOICING

There are a number of options available to you when it comes to generating invoices. Your venue for example may choose to invoice in advance of the booking date or in arrears.

You are also provided with tools to generate invoices in bulk for all hirers across a specified date range and for individual bookings both manually or using the [Automated Invoicing](#) feature.

Whichever method you choose will save you time and take the headache out of the invoicing process, particularly when used in conjunction with one or more of the [Online Payment](#) options available to you.

You can learn more about the full range of invoice options using our [Help & Support](#) guides.



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