Operations checklist

If your property has been closed or if you've been operating at reduced capacity, it's a good idea to remind yourself of the typical daily operational steps you and your team need to take.
Here's a rundown of the key events, broken down by shift, so you don't miss anything.

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Pre-arrival

Morning Shift	Afternoon Shift	Night Shift
Reservation Overview report		
Check all arrivals/departures/no-shows ☐	Remaining arrivals have been allocated inspected rooms ☐	Remaining arrivals have been allocated inspected rooms ☐
Check rates ☐	Late departures are charged with applicable fees ☐	**> Reservations report**
Check room allocations ☐		Check all departures for tomorrow ☐
> Online check-ins	**> Online check-ins**	**> Guest ledger**
Take missing pre-authorizations ☐	Registration cards are printed ☐	Check open balances ☐
Print registration cards ☐	**> Guests in house report**	Close any balanced bills ☐
Prepare keys ☐	Check all open balances of guests ☐	**> Posting journal**
> Guests in house report	**> Follow up on any pending tasks, messages, and orders**	Check any rebates for valid reasons ☐
Check all open balances of guests ☐	**> Guest ledger**	**> Manager report**
> Follow up on any pending tasks, messages, and orders	Check open balances ☐	Check all revenues are posted correctly ☐
> Check "Missed Optional Reservations"	Close balanced bills ☐	**> Check all bookings for no-shows**
> Guest ledger	**> Reservations report**	**> Follow up on any pending tasks, messages, and orders**
Check open balances ☐	Check all arrivals for tomorrow ☐	**> Print Registration cards (if applicable)**
Close balanced bills ☐	**> Customer profiles**	**> Check pending in-house guest profiles**
> Cashier handover	Ensure all in-house profiles are updated accordingly ☐	
	> Cashier handover	

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Operations checklist

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Housekeeping

> **Check Space status**

> **Export the Space status report to Excel**

> **Break down staff duties**

> **Change bed linen – filter guests by length of stay**

Management

Reservations report

> **Bookings created yesterday**

Special requests ☐

Payments for non-refundable bookings ☐

Follow-up on bookings with missing credit card details or failed payments ☐

> **No-show report (Filters: group by cancellation reason; canceled on)**

> **Bookings arriving today**

Special requests ☐

Payments for non-refundable bookings ☐

Follow-up on bookings with missing credit card details, or failed payments ☐

Occupancy Report

> **Check Occupancy**

> **Check Average Daily Rate**

> **Check Rooms Booked**

Availability report

> **Set overbooking**

> **Block rooms from sales**

Manager report

> **Analyze the performance**

> **If you wish to include the taxes, tick the box "Include Tax," and run the report again**

Shift Planning (Front Office, Housekeeping, F&B)

> **Check Reservation Overview statistics to see the number of arrivals, departures, stay-overs**

> **Product report**

Check total number of customers in-house ☐

See how many products were sold in each category ☐

If applicable, track the number of extra beds ☐

> **Activity Report**

Check for operational busy hotspots ☐

Plan shifts accordingly ☐

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