

Boat-Rental Closing Checklist

Use the closing routine to leave accurate inventory, financial and exception records for the next shift rather than unresolved notes and personal messages.

Important: Adapt this checklist to the actual vessels, facility, manufacturer instructions, jurisdiction, insurance, staffing and emergency plan. It is not a universal legal or safety document.

Returned fleet

- ☐ Record actual return time and assigned unit.
- ☐ Complete condition, fuel or battery, cleanliness and accessory review.
- ☐ Document new damage, missing items and customer communication.
- ☐ Apply ready, restricted, maintenance or out-of-service status immediately.
- ☐ Stage cleaning, fueling, charging, repair and storage actions.

Notes:

Reservations and customers

- ☐ Close completed, cancelled, no-show and weather-affected reservations accurately.
- ☐ Record late returns, substitutions, incidents and promised follow-up.
- ☐ Confirm messages were sent and customer responses were retained.
- ☐ Identify early departures, special requirements and unresolved issues for tomorrow.
- ☐ Assign every open customer item to a named owner.

Notes:

Payments and records

- ☐ Reconcile payments, refunds, credits, deposits, authorizations and open balances.

- Match payment-provider references to reservation records.
- Preserve inspection evidence supporting any proposed charge or deduction.
- Secure cash and documents according to the approved procedure.
- Flag failed, expiring or incomplete transactions for prompt review.

Notes:

Facility and handoff

- Secure keys, chargers, equipment, offices, gates, fuel and storage areas.
- Check docks, ramps, lighting, weather exposure and overnight hazards.
- Shut down systems only after required reports and backups are complete.
- Prepare the next-day exception list with status, owner and due time.
- Record the closing employee and manager review where required.

Notes:

Completed by	Date and time	Manager review

Created August 4, 2026. Review and update the working version whenever equipment, policies, laws, operating conditions or responsibilities change.