



# Seasonal Cleaning:

## Freshening Up Your

## Dashboard



March 16, 2022

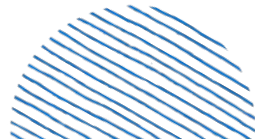
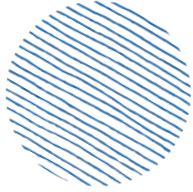
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# Today's Agenda

**Pricing**

**Calendars**

**Reports**



# Poll

## Do you use price schedules?

- Yes
- No
- What are price schedules?



# Pricing



# Customer Type Pricing vs. Pricing Schedules

You can have many customer types within an item, which can get cluttered.

## Customer Type Pricing

- Individual pricing on an item
- Clutters up an item with outdated pricing

## Pricing Schedules

- A set of price sheets and the rules that determine when they become effective
- Keeps pricing organized



# Examples

## 2019 Schedule

### High Season Rate

Manage rules for when this sheet is used

Rules

Settings

[? Learn about price schedule rules ↗](#)

+ Add rule

This sheet can only be used when at least one rule of each type you've added matches.

Type	When	Delete
Booking date	1/1/19 - 12/31/19	<a href="#">Delete</a>
Availability date	6/1/19 - 8/31/19	<a href="#">Delete</a>
	12/20/19 - 1/5/20	<a href="#">Delete</a>
Availability day of week	Su, Th, F, S	<a href="#">Delete</a>



# Calendars

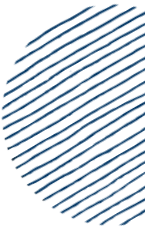
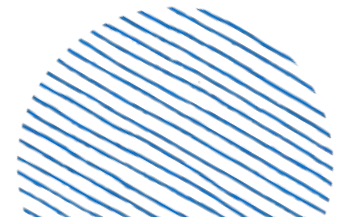
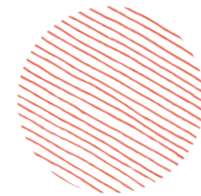




## Poll

### How far in advance do you build out your calendars/availabilities?

- 0-1 month
- 2-3 months
- 4-6 months
- 6+ months



# Calendars & Availabilities

## Are you set up for future bookings?

- Build out your calendars at least 6 months in advance with all availabilities
- Look at your reports to see what availabilities are performing best and worst and consider adjusting

Best Practice:  
Build out your  
calendars 6-12  
months in advance.



# Examples

◇ Create availability starting on Thursday, February 10th 2022 ▾

**General**

**Time & Length**

Time range ▾

Starting at  Hours

Ending at 12pm

+ Add another start time

**Repeating**

Don't repeat ▾

**Total capacity**

**Customer Types**

Choose which customer types should be added to this availability:

Select: [all](#), [none](#)  Show customer type IDs

	Per-booking minimum:	Per-booking maximum:	Per-availability capacity:
<input checked="" type="checkbox"/> Person	<input type="text" value="None"/>	<input type="text" value="None"/>	<input type="text" value="None"/>

**Advanced**

**Public headline**

**Private headline**

Optional, only shown to people in your company

**Online booking status**

▾

Bookable online until full or cutoff is reached

Unlisted

**Custom fields group**

Default group  ▾

For whole booking

**Requirements**

Boat Seats  ▾

Which resources need to be available before bookings can be created



# Reports



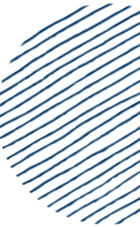
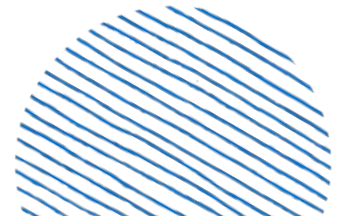
## Poll

**Approximately how many  
custom reports do you currently  
have saved?**

→ 0-2

→ 3-5

→ 6+



Dig into your data  
to make informed  
business decisions.

# Reports

## Getting Familiar

- Generating Reports
- Filtering
- Refreshing Reports

## Saving Reports

- Ensure your custom reports are accessible moving forward



# Other Things to Keep in Mind



That feeling of a thorough cleaning is hard to beat.

# What else can you refresh?

## Photos

- Replace photos with current images of customers enjoying your activities
- Adjust your marketing to focus on seasonal items

## Booking Flows

- Do you have seasonal or special items that need to be updated?
- Refresh photos tied to booking flows

## Custom Fields

- Each custom field is attached to how many items?
- For more on custom fields, register for our next webinar!





Thank you!





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To get you started, here are a few to follow up this webinar:

1. [The Trust Factor: How Instilling Trust in Your Customers Boosts Your Bottom Line](#)
2. [Optimize Your Website to Capture Last-Minute & In-Destination Bookings](#)
3. [2021: Annual Checklist for Tour and Activity Operators](#)





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