



# FareHarbor for You:

## Tools for the Reservationist

April 27, 2022

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Client Dashboard Specialist

FareHarbor Denver



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Client Dashboard Specialist

FareHarbor Denver



# Today's Agenda

**Bookings**

**Payments**

**Resources**



# Poll

## How would you categorize your Dashboard knowledge?

- Beginner
- Intermediate
- Advanced



# Bookings



Reservationists often create bookings and orders on the Dashboard.

# All About Bookings

## Creating Bookings

- Creating a regular booking
- Creating an order

Pat Cooper

[Change contact language](#)

808-555-1234

Opt-in to text messages ⓘ

patcooper@example.com

Subscribe to company email list

Send confirmation email

[Add booking note](#)

0 ▾	<b>Adults VIP (\$85)</b> 0 on previous bookings
0 ▾	<b>Children VIP (\$55)</b> 0 on previous bookings
0 ▾	<b>Adults Standard (\$60)</b> 0 on previous bookings





# All About Bookings

## Creating Bookings

- Overbooking

Reservationists often create bookings and orders on the Dashboard.

Harbor Tour  
Wednesday, April 27th 2022

Online closed ▾ 6 booked 0 available ▾ 0 crew ▾

Capacities	Resources
Booked	6 0
Available	0 0
People	6 0

6 booked  
6 People

Availability note

Harbor Tour  
Full 6 0

Walking Tour  
Tuesday, April 26th 2022  
@ 10am - 12:30pm

Overbooking Children

Full name \*

Phone number

Email address

Add booking note

2 Adults (\$60)  
18+ years  
2 on previous bookings

1 Children (\$50)  
2 - 17 years  
-2 of 3 left **Overbooking**

26 27

10am Walking Tour  
6 4

Actions & Settings

Manifest

+ Duplicate

Adults 2 4

Children 4/3 0



# All About Bookings

## Resource Overrides

Create override starting on Thursday, April 28th 2022

<b>Duration</b> All day	<b>Repeating</b> Don't repeat	<b>Maximum uses</b> 25 <small>The maximum number of this resource that can be used at one time</small>
		<b>Notes</b> Boat can take 5 extra people this day <a href="#">Preview Markdown</a>

[Create override](#) [Cancel](#) [How to use resource overrides](#)





Managing existing bookings is an important skill for a Reservationist.

# All About Bookings

## Managing Bookings

- Finding bookings
- Cancelling and rebooking
- Closing an availability
- Communicating with booked customers



# Checking Customers in on a Manifest

17 total	⇅	0 checked in
17 Adults		17 not checked in
6 Adults		Not checked in
3 Adults		Not checked in
2 Adults		Not checked in
6 Adults		Not checked in

Example of a manifest prior to checking anyone in

17 total	⇅	14 checked in
17 Adults		14 checked in 3 no-show
6 Adults		All checked in
3 Adults		All checked in
2 Adults		All no-show
6 Adults		5 Adults checked in, 1 Adult no-show

Example of a manifest while checking people in



## Poll

### What method do you use to find a booking?

- Search Bar
- Recent Bookings Feature
- From the Bookings Calendar
- All of the above
- None of the above



# Payments



# All About Payments

## Payment Activities

- Credit card holds

Credit card holds can help you prevent fraud, chargebacks, and unnecessary refunds.

Hold money on card

Hold amount:

\$ 100.00

Days until release:

7

Card will still be available to attempt new charges even after hold is released.

Booking #320044

Today @ 2:15pm by Jess Wright (FareHarbor Demo)

Brunch Cruise

Saturday, May 21st 2022 @ 11am - 1pm

**Paid in Full**

Payments: \$252.00  
Booking total: \$252.00  
Holds: \$100.00

Order: None [+ Start new order](#)

Booking notes:

4 Adults not checked in (4 total)

Adult	:	\$60.00
Not checked in		\$60.00
Orca Boat Seats: 1		
Adult	:	\$60.00
Not checked in		\$60.00
Orca Boat Seats: 1		
Adult	:	\$60.00
Not checked in		\$60.00
Orca Boat Seats: 1		
Adult	:	\$60.00
Not checked in		\$60.00
Orca Boat Seats: 1		

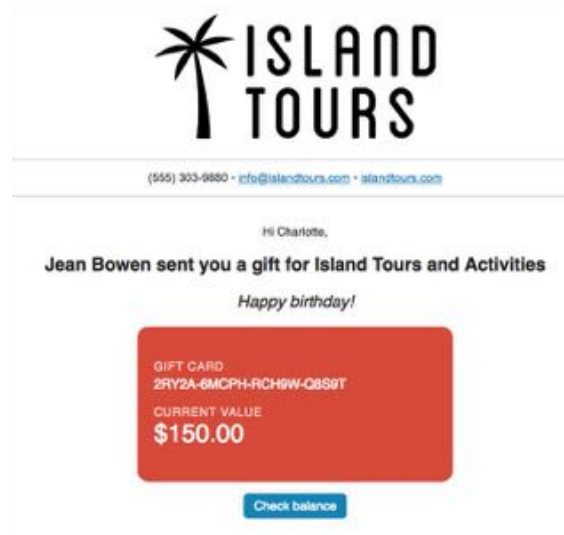


# All About Payments

## Payment Activities

- Gift cards
- Redeeming a gift card

Taking payments is another important action for a Reservationist.



# All About Payments

## Payment Activities

- Issuing refunds

Taking payments is another important action for a Reservationist.

<b>Fareharbor Webinar</b> 4/24/22 by Jess Wright	<b>\$189.00</b> <a href="#">Details</a>	
<input type="radio"/> Don't refund	<input type="radio"/> Partial refund	<input checked="" type="radio"/> Full refund

<b>Fareharbor Webinar</b> 4/25/22 by Jess Wright	<b>\$52.50</b> <a href="#">Details</a>	
<input type="radio"/> Don't refund	<input checked="" type="radio"/> Partial refund	<input type="radio"/> Full refund
Refund amount:	<input type="text" value="\$ 52.50"/>	<input type="button" value="📱"/>





# Resources



We offer a variety of resources so you feel confident in your role.

# Resources

## Keyboard Shortcuts

- General
- Dashboard
- Bookings
- ...and more!

## Educational Resources

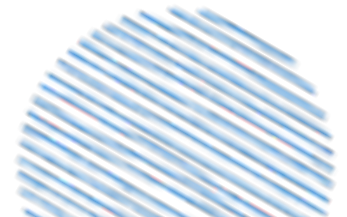
- Help center - your best friend
- Compass
- Live & on-demand webinars



## Poll

### What demonstration have you found most helpful today?

- Credit card holds
- Sending out canned messages to all bookings
- Starting orders
- Other



Thank you!





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# compass



## Have you checked out Compass recently?

Our webinar series is just one of the many resources we have to support you in growing your business. **Login** to Compass for guides on PPC, Google, SEO, content writing, industry insights and more!

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

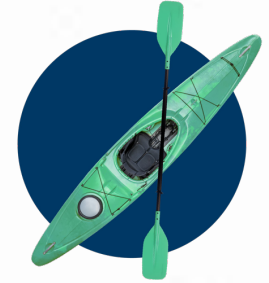
- [\*\*Dashboard 101: Managing Your Bookings\*\*](#)
- [\*\*FareHarbor 101: Create a Foundation for Success\*\*](#)
- [\*\*FH Terminology: Items, Settings, & Reports\*\*](#)
- [\*\*FH Terminology: Dashboard & Booking Topics\*\*](#)





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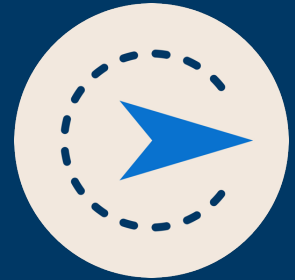
**FAREHARBOR**



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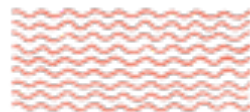
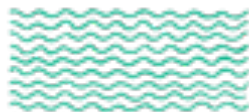
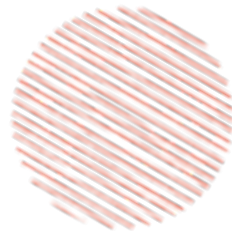
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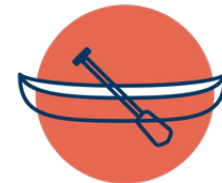
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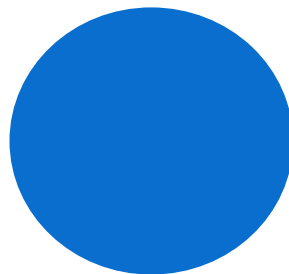
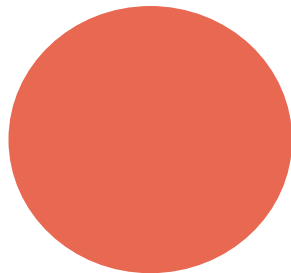
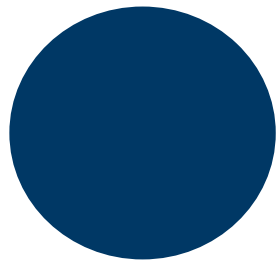
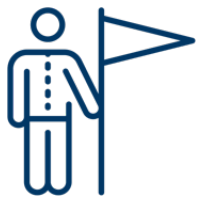


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# FAREHARBOR webinars





