



Tailor Your Dashboard with Custom Fields



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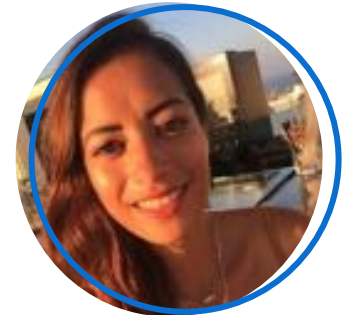


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Today's Agenda

**What are
custom fields?**

**Updating
custom fields**

**Promo
codes**



Poll

Which of these is a type of custom field?

- Text Input
- Checkbox
- Strike box
- All of the above



what are custom fields?



Custom fields help you streamline your processes and collect additional details from customers during the booking process.


What are Custom Fields?

custom fields

- Text Input
- Dropdown Menus
- Checkboxes
- Labels
- Waivers
- Promo Codes

Custom Fields

Gather additional information from your customers, offer them extra options, or track information internally

 Get help with custom fields ▾

 Preview ▾

 ▾

 New custom field

All

Text input

Checkbox

Dropdown

Quantity

Code

Label

Waiver

Gift card



text input

Single-Line Text Input

Full Name



Please enter the full name of each participant

Multi-Line Text Input

Comments

Any additional notes or requests?



checkbox

\$15.00

Add a t-shirt to my order

Sizes XS-XL available

Please check this box to confirm you have read and agree to the following Terms & Conditions:

- Those over the age of 18 must show photo I.D. upon entry
- No Refunds
- Must wear closed-toe shoes



dropdown menus

Group Experience **\$15**

Number of participants — \$15.00
Please select the number of people who will be participating.

- ✓ 1
- 2
- 3

How did you hear about us?

Choose an option ▼

Q|

- Internet search
- Yelp
- TripAdvisor
- Google+
- Facebook
- Instagram
- Twitter
- Friend



waivers

Waiver	2 signed ▾
Anna Clark (anna.clark@example.com)	↓ ▾
Hailey Clark (hjclark8@example.com)	↓ ▾



labels

Tandem Kayak \$30



Additional Information

How did you hear about us?

Choose an option

Additional Options

\$60 Professional Photography

Action shots taken with the latest DSLR technology

Do you have a promo code?



Poll

What custom fields will you be adding to your book form?

- Text Input
- Checkbox
- Dropdown Menus
- Waivers
- Labels



Does the custom field affect an individual customer or everyone in the booking?

Per-Person

Person \$45 ✕

Full Name

0 ▼ Age

Select your Entree

Adult \$130 ✕

Guest Full Name

Guest Age

Guest Height and Weight

Please use feet and inches for height and lbs for weight. For example: 5'6", 145lbs.

Per-Booking

Comments

Any additional notes or requests?

Do you have a promo code?

Enter your code here.

Accepts codes from [36 campaigns](#)



Required vs. Non-Required

Full Name

 *

Please enter the full name of each participant

\$15.00

Add a t-shirt to my order

Sizes XS-XL available



Online vs. Direct Visibility

Added to 1 item ▾		Prices and visibility: Base ▾	
		Visibility	Price
<input type="checkbox"/> \$50 Reserve a Guide! <i>Select any two hours from 9:00am to 5:00pm to paddle with a guide</i>		Visible	\$50.00
		Visibility	



Use logic to make fields appear when certain criteria is met.

Logic

What is logic?

- Showing certain fields only when certain conditions are met

Show this field when:

How did you hear about us? ✕ ▼

is: ▼

How did you hear about us?

Other ✕ ▼

Add Cancel



Adjustable Pricing

Easily add price adjustments to a booking.

With custom fields with adjustable pricing, you can:

- Tax a food adjustment and retail adjustment
- Add price adjustments while making a booking
- Run reports on commonly used adjustments
- Override invoice pricing if needed for adjustments

Price Adjustment

Dollar ✕ ▾

Changed price: **-\$20.00** ▾

\$ -20 Reset





Updating Your Book Form

Why update?


- Updating what is already on your book form instead of continuously creating new custom fields can decrease the amount of clutter on your book form




Decrease clutter and keep your book form fresh and clean.

[Dropdown] How did you hear about us?

Added to 9 items  Prices and visibility: Base 

	Visibility	Price
How did you hear about us?	Visible	

Choose an option 

 Delete field  Edit field 



Promo Codes



Poll

How do you create promo codes?

- I reach out to FareHarbor Support 100% of the time
- I build them myself 100% of the time
- I've tried building them myself and get stuck
- What are promo codes/I don't use promo codes



Promo codes allow you to offer discounts to your customers.

Promo Codes

Friends & Family Discount

25%

Codes

Settings



+ Import or generate codes

⚙️ Find

1 of 1 code	Uses	Maximum Uses	Edit
ohana25	1	Unlimited	Edit »

Please enter your promo code here



more best practices



There are more ways to optimize your book form!

More Best Practices

- Include only one type of promo redemption field on each item's book form.
- Don't add too many custom fields!
- Don't add too many photos to your book form
- If the same field can be used for multiple items, combine and use the same field where possible.
- Archive old fields you are no longer using.
- Don't include external links within your book form



thank you!





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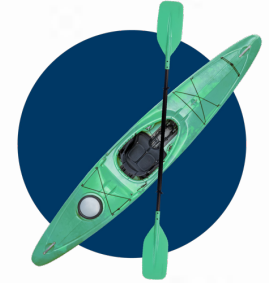
- [Custom Fields Basics](#)
- [FH Terminology: Dashboard & Booking Topics](#)
- [FH Terminology: Items, Settings, & Reports](#)
- [Are Your Tours Right for My Business?](#)





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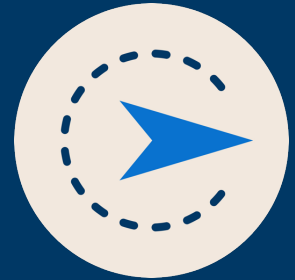


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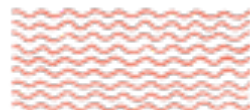
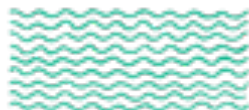
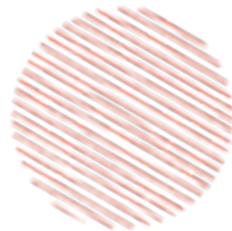
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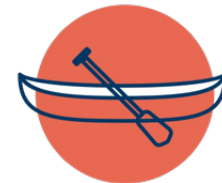
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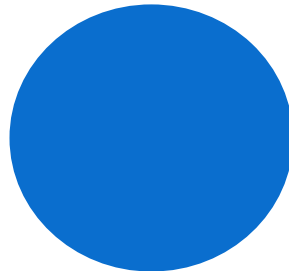
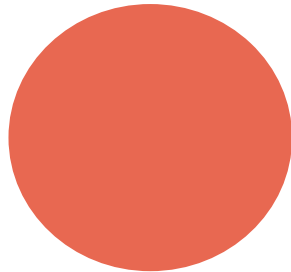
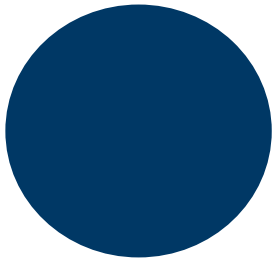
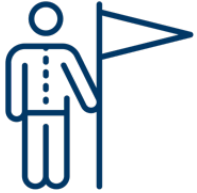
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