

FAREHARBOR

SPARK 

 VIRTUAL 2022 



# Henri de Saussure

*TECHNICAL SUPPORT* FareHarbor





*CUSTOMIZING* FareHarbor:

**5 Ways to Streamline**

**Your Day-to-Day Operations**



# How to make **FareHarbor** work for you!



## **Tailor your FareHarbor dashboard to your needs**

Choose what you see and how



## **Optimize your workflow**

Work faster within your dashboard



## **Diversify your payment options**

Gain flexibility & get more bookings



# What will we cover?

**1**

**Custom Calendar Views**

**2**

**Custom Manifest Views**

**3**

**Users: notifications & crew assignment**

**4**

**Adjustable Pricing Fields**

**5**

**In Person Payment Options**



# First, let's focus on...

**1**

## **Custom Calendar Views**

See inventory-based views and big picture booked information

**2**

## **Custom Manifest Views**

**3**

**Users: notifications & crew assignment**

**4**

## **Adjustable Pricing Fields**

**5**

## **In Person Payment Options**



“

I am struggling with seeing all my reservations on my **calendar**. I have lots of different types of tours and rentals and there's so much detail to see. Can this information be **filtered** at all?

”



**Michael S.**  
Scranton Rentals





## Custom Calendar Views

### Full calendar view:

- View all your availabilities
- Could feel cluttered



August - 2022 - Today < >

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
7	8	9	10	11	12	13
▣ Kayak Rentals (9) ▣ 8 on 8 bookings	▣ Kayak Rentals (9) ▣ 0 on 0 bookings	▣ Kayak Rentals (9) ▣ 8 on 8 bookings	▣ Kayak Rentals (9) ▣ 0 on 0 bookings	▣ Kayak Rentals (9) ▣ 8 on 8 bookings	▣ Kayak Rentals (9) ▣ 0 on 0 bookings	▣ Kayak Rentals (9) ▣ 8 on 8 bookings
▣ SUP Rentals (8) ▣ 8 on 8 bookings	▣ SUP Rentals (8) ▣ 0 on 0 bookings	▣ SUP Rentals (8) ▣ 8 on 8 bookings	▣ SUP Rentals (8) ▣ 0 on 0 bookings	▣ SUP Rentals (8) ▣ 8 on 8 bookings	▣ SUP Rentals (8) ▣ 0 on 0 bookings	▣ SUP Rentals (8) ▣ 8 on 8 bookings
▣ ATV Hourly Rentals (17) ▣ 8 on 8 bookings	▣ ATV Hourly Rentals (17) ▣ 0 on 0 bookings	▣ ATV Hourly Rentals (17) ▣ 8 on 8 bookings	▣ ATV Hourly Rentals (17) ▣ 0 on 0 bookings	▣ ATV Hourly Rentals (17) ▣ 8 on 8 bookings	▣ ATV Hourly Rentals (17) ▣ 0 on 0 bookings	▣ ATV Hourly Rentals (17) ▣ 8 on 8 bookings
▣ Princess II Boat Charter (3) ▣ 8 on 8 bookings	▣ Princess II Boat Charter (3) ▣ 0 on 0 bookings	▣ Princess II Boat Charter (3) ▣ 8 on 8 bookings	▣ Princess II Boat Charter (3) ▣ 0 on 0 bookings	▣ Princess II Boat Charter (3) ▣ 8 on 8 bookings	▣ Princess II Boat Charter (3) ▣ 0 on 0 bookings	▣ Princess II Boat Charter (3) ▣ 8 on 8 bookings
▣ Peak Clerk - Boston (4) ▣ 8 on 8 bookings	▣ Peak Clerk - Boston (4) ▣ 0 on 0 bookings	▣ Peak Clerk - Boston (4) ▣ 8 on 8 bookings	▣ Peak Clerk - Boston (4) ▣ 0 on 0 bookings	▣ Peak Clerk - Boston (4) ▣ 8 on 8 bookings	▣ Peak Clerk - Boston (4) ▣ 0 on 0 bookings	▣ Peak Clerk - Boston (4) ▣ 8 on 8 bookings
▣ Peak Clerk - Los Angeles (4) ▣ 8 on 8 bookings	▣ Peak Clerk - Los Angeles (4) ▣ 0 on 0 bookings	▣ Peak Clerk - Los Angeles (4) ▣ 8 on 8 bookings	▣ Peak Clerk - Los Angeles (4) ▣ 0 on 0 bookings	▣ Peak Clerk - Los Angeles (4) ▣ 8 on 8 bookings	▣ Peak Clerk - Los Angeles (4) ▣ 0 on 0 bookings	▣ Peak Clerk - Los Angeles (4) ▣ 8 on 8 bookings
▣ Spin Ocean Dinner Cruise ▣ 10	▣ Spin Ocean Dinner Cruise ▣ 10	▣ Spin Ocean Dinner Cruise ▣ 8 Captain: Bob Marley Tour Guide: Frank Zappa	▣ Spin Ocean Dinner Cruise ▣ 10	▣ Spin Ocean Dinner Cruise ▣ 10	▣ Spin Ocean Dinner Cruise ▣ 10	▣ Spin Ocean Dinner Cruise ▣ 10
14	15	16	17	18	19	20
▣ Kayak Rentals (9) ▣ 8 on 8 bookings	▣ Kayak Rentals (9) ▣ 0 on 0 bookings	▣ Kayak Rentals (9) ▣ 8 on 8 bookings	▣ Kayak Rentals (9) ▣ 0 on 0 bookings	▣ Kayak Rentals (9) ▣ 8 on 8 bookings	▣ Kayak Rentals (9) ▣ 0 on 0 bookings	▣ Kayak Rentals (9) ▣ 8 on 8 bookings
▣ SUP Rentals (8) ▣ 8 on 8 bookings	▣ SUP Rentals (8) ▣ 0 on 0 bookings	▣ SUP Rentals (8) ▣ 8 on 8 bookings	▣ SUP Rentals (8) ▣ 0 on 0 bookings	▣ SUP Rentals (8) ▣ 8 on 8 bookings	▣ SUP Rentals (8) ▣ 0 on 0 bookings	▣ SUP Rentals (8) ▣ 8 on 8 bookings
▣ ATV Hourly Rentals (17) ▣ 8 on 8 bookings	▣ ATV Hourly Rentals (17) ▣ 0 on 0 bookings	▣ ATV Hourly Rentals (17) ▣ 8 on 8 bookings	▣ ATV Hourly Rentals (17) ▣ 0 on 0 bookings	▣ ATV Hourly Rentals (17) ▣ 8 on 8 bookings	▣ ATV Hourly Rentals (17) ▣ 0 on 0 bookings	▣ ATV Hourly Rentals (17) ▣ 8 on 8 bookings



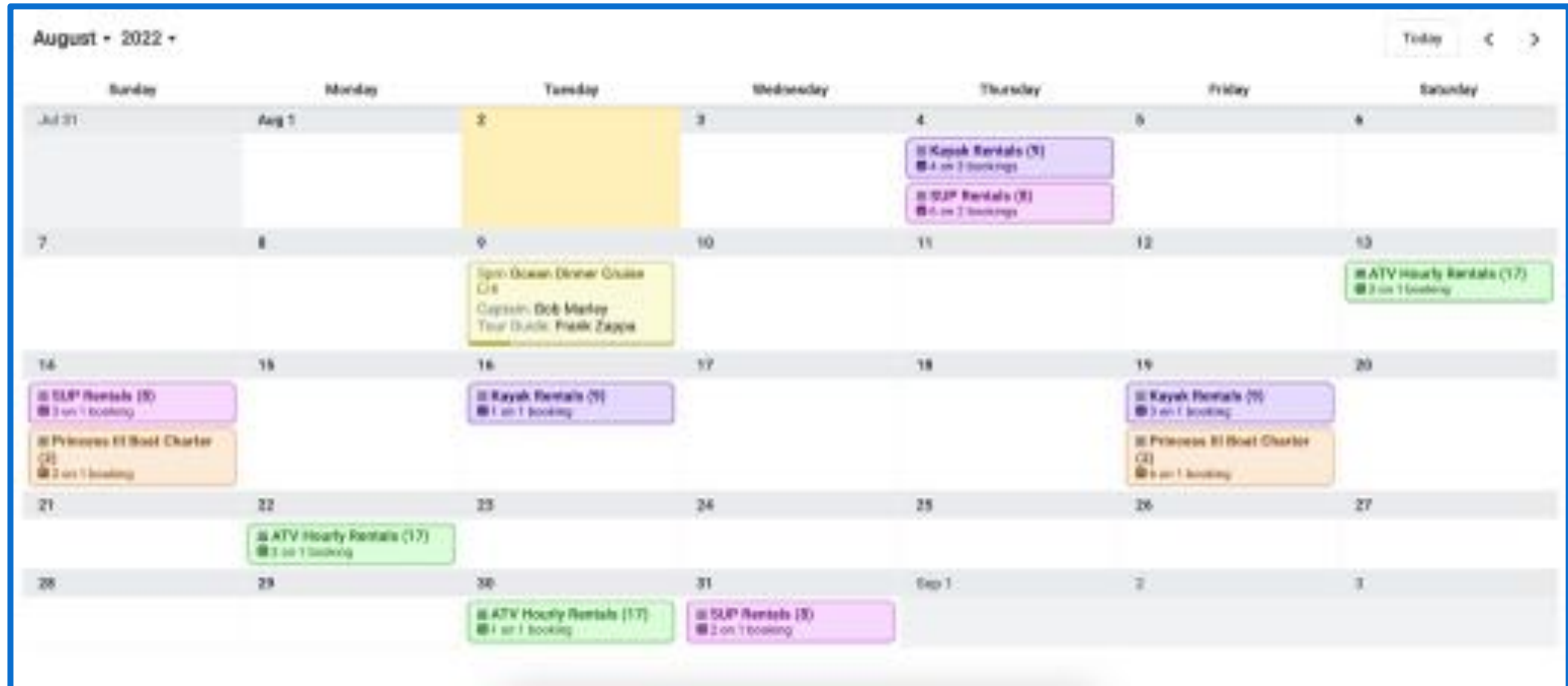
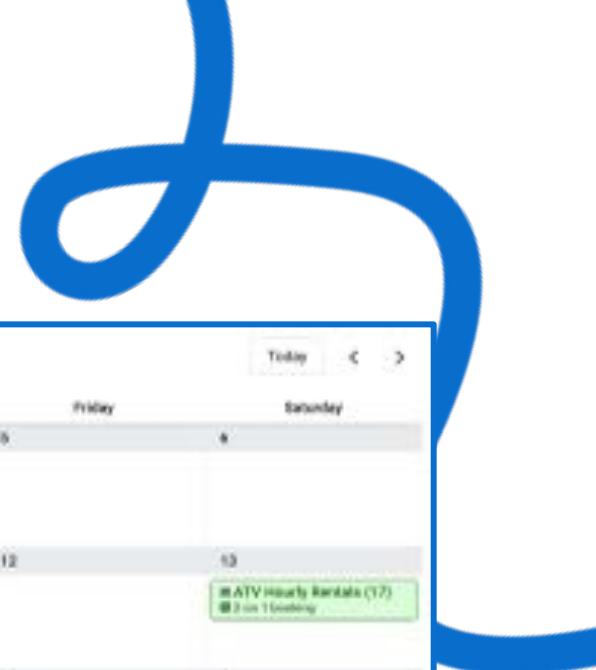




## Custom Calendar Views

Filtered view - only display availabilities with bookings:

- Focuses on existing bookings





# Custom Calendar Views

## Monthly, weekly, daily or hourly views:

The screenshot shows a monthly calendar view for August 2022. The interface includes a top navigation bar with 'Bookings', 'Manifest', 'Reports', 'Items', 'Settings', and 'Help'. Below the navigation, there are filters and search options. The calendar grid displays activities for each day from Thursday 8/4 to Wednesday 8/10. Activities are represented by colored blocks with icons and text, such as 'Tour Guide: Frank Zappa' and 'Ocean Dinner Cruise'.

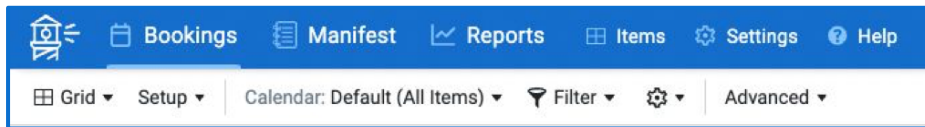
The screenshot shows a daily agenda view for Thursday, August 4th, 2022. The interface includes a top navigation bar with 'Bookings', 'Manifest', 'Reports', 'Items', 'Settings', and 'Help'. Below the navigation, there are filters and search options. The agenda lists activities for the day, such as 'Kayak Rentals', 'SUP Rentals', 'ATV Hourly Rentals', and 'Rock Climb - Los Angeles', with time slots and resource allocation.

The screenshot shows an hourly timeline view for Thursday, August 4th, 2022. The interface includes a top navigation bar with 'Bookings', 'Manifest', 'Reports', 'Items', 'Settings', and 'Help'. Below the navigation, there are filters and search options. The timeline displays activities for each hour, such as 'Kayak Rentals', 'SUP Rentals', 'ATV Hourly Rentals', and 'Ocean Dinner Cruise', with time slots and resource allocation.

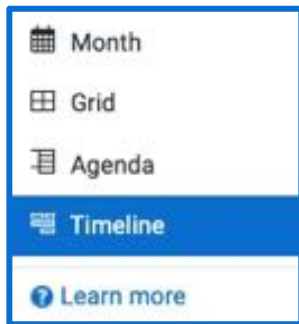




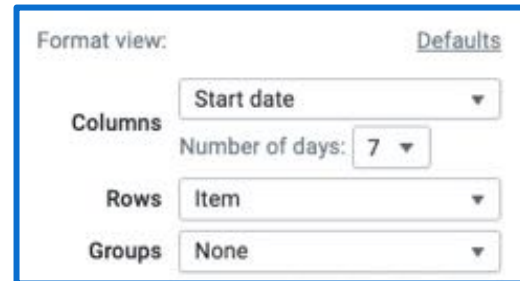
# Custom Calendar Views



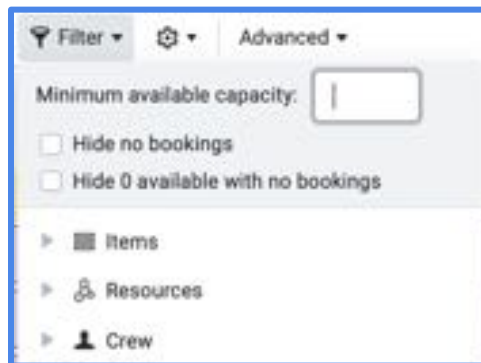
Monthly, weekly, daily or hourly views:



Choose what you see:



Make use of filters:





## Custom Calendar Views

### Inventory/Resources view:

- See when your rentals/guides/vehicles etc. are in use

Saturday, September 24th 2022 ▾

Resource	9am	10am	11am	12pm	1pm
Boat 1 Seats (120pax)		22 Departing Tea 9/24/22 @ 10am	41 Departing Nelson Bay 9/24/22 @ 11:15am		
	0 used	22 used	0 or 41 used	0 used	
	200 max				
	200 free	178 free	200 159 free	200 free	
Boat 2 Seats (72 pax)	2 Departing Tea 9/24/22 @ 9am		4 Departing Tea 9/24/22 @ 11am		
	2 used	0 used	4 used	0 used	
	200 max				
	198 free	200 free	196 free	200 free	

### Overlapping activities:

- Get an hourly overview of your bookings

Saturday, September 24th 2022 ▾

Item	9am	10am	11am	12pm	1pm
Departing Nelson Bay	8:30 Departing Nelson Bay JESSE 0 0	10am Departing Nelson Bay JESSE 0 0 72	11:15am Departing Nelson Bay JESSE 41 0 59	12:30pm Departing Nelson Bay JESSE 0 0 72	
Departing Tea Gardens	9am Departing Tea Gardens JESSE 1 0 29	10am Departing Tea Gardens JESSE 11 0 89	11am Departing Tea Gardens JESSE 2 0 70		1:30 Departing Tea Gardens JESSE 0 0 1





## Custom Calendar Views

How to **create** and **save** a custom calendar view?

	Sunday	Monday	Tuesday	Wednesday
Show past week		Aug 1	2	3
Show past week		8	9	10
Show past week		15	16	17
Show past week		22	23	24
	28	29	30	31





## A few suggestions...

- ❑ Create **multiple** calendars sorted by activity type
- ❑ Create **crew member-specific** views for your staff
- ❑ Save an **inventory-focused** calendar (boats, bikes, ATVs, etc.)
- ❑ Save a **timeline view** for hour-per-hour details of your bookings



# Calendars are great - but what about **manifests**?

1

Custom Calendar Views

2

**Custom Manifest Views**

Filter what information your staff sees for different purposes

3

Users: notifications & crew assignment

4

Adjustable Pricing Fields

5

In Person Payment Options





My staff don't like using the manifest because there's **too much information** on it. There's even some information I'd rather my staff NOT see. **Can the manifest be changed at all?**



**Raymond H.**  
Brooklyn Sailing







# Custom Manifest Views

Thursday, August 4th 2022 • Availabilities • All Items • Today < >

Manifest: All-Info Manifest • Columns • Filter • Actions • User

### Kayak Rentals

#### 8am

Online closed • 3 booked 12 available • 1 crew • Seating Actions & Settings Print at

Crew name	Role	Note												
Marge Simpson	Checkin													
ID	Contact	3 total	Pax	0 checked in	Seating zone	Seats	Delivery	Delivery info	Lodging	Total	Due	Co	Re	Notes
	2 bookings	3 Two Hour Rentals	3	3 not checked in		0 seated 0 unassigned				\$96.30	<del>\$96.30</del>			
#344563	11111111111 Karen Test karen@test.com	2 Two Hour Rentals	2	Not checked in			No			\$64.20	<del>\$64.20</del>			
#344567	22222222222 Katy Test k@test.com	1 Two Hour Rental	1	Not checked in			No			\$32.10	<del>\$32.10</del>			

### ATV Hourly Rentals

#### 8am

Online closed • 6 booked 0 available • 0 crew • Seating Actions & Settings Print at

ID	Contact	6 total	Pax	0 checked in	Seating zone	Seats	Fees	Full Name	Fuel Add-On	ATV Insurance	Lodging	Total	Due	Co	Re	Notes
#349766	22222222222 Polly Petersen	6 Two Hour Rentals	6	Not checked in								\$0.00	<del>\$0.00</del>			

### SUP Rentals

#### 9am

Online closed • 4 booked 5 available • 0 crew • Seating Actions & Settings Print at

ID	Contact	4 total	Pax	0 checked in	Seating zone	Seats	Delivery	Delivery info	Lodging	Total	Due	Co	Re	Notes
#344565	99999999999 Zach Test z@test.com	4 One Hour Rentals	4	Not checked in			No			\$64.20	<del>\$64.20</del>			

### Kayak Rentals

#### 11am

Online closed • 1 booked 14 available • 0 crew • Seating Actions & Settings Print at

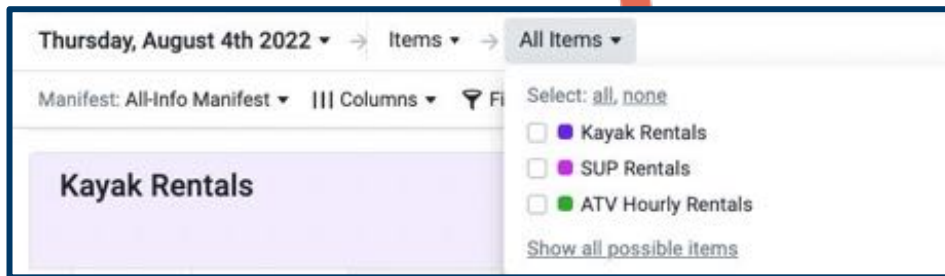
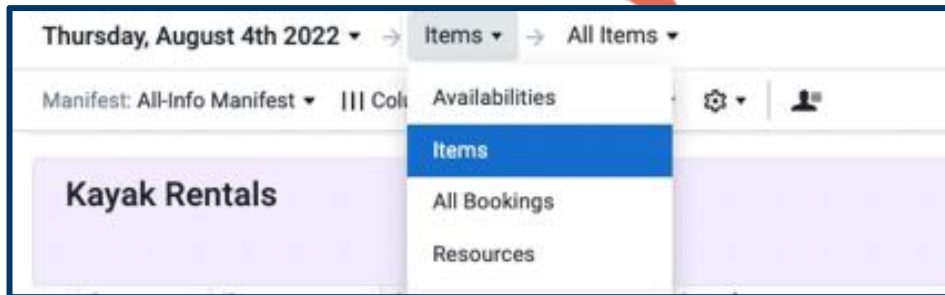
ID	Contact	1 total	Pax	0 checked in	Seating zone	Seats	Delivery	Delivery info	Lodging	Total	Due	Co	Re	Notes
#344664	77777777777 Jared Testing j@test.com	1 Three Hour Rental	1	Not checked in			No			\$48.15	<del>\$48.15</del>			





## Custom Manifest Views

**Just like calendars,** we can sort it by availabilities, items, bookings or resources





## Custom Manifest Views

Furthermore, we can choose to display any choice of:

- **Booking info**
- **Custom fields**

And save it as a new manifest

This screenshot shows the 'Manifest: Default' column selection menu. The menu is open, displaying a list of options: 'Default', 'Boat tours', 'Rentals', and 'Private charters'. Below the list, there is a section titled 'Save your current column and filter options as a new custom manifest:' with a text input field for 'Manifest name' and a checkbox for 'Include view and selected items'. The 'Create' and 'Cancel' buttons are at the bottom.

This screenshot shows the 'Basic columns' menu. The menu is open, displaying a list of options: 'Show customers toggle', 'Booking ID', 'Order', and 'Contact name'. The 'Show customers toggle' and 'Contact name' options are checked.

This screenshot shows the 'Custom fields' menu. The menu is open, displaying a list of options: 'Include custom fields', 'ATV Insurance', 'Delivery', and 'Delivery Info'. The 'Include custom fields' option is checked. Below the list, there is a note: 'Not including custom fields can make your manifest load faster.' and a 'Select: all, none' dropdown menu.





## A few suggestions...

- ❑ **Display** selected **custom fields** on the manifest (i.e.: add-ons, allergies, special requests, etc.)
- ❑ Include **contact information** of your customers
- ❑ **Create** different manifests for anyone in your staff
- ❑ **Filter** out unnecessary details



# Communication is key..

1

Custom Calendar Views

2

Custom Manifest Views

3

**Users: notifications & crew assignment**

Keep your staff up to date and automatically notified

4

Adjustable Pricing Fields

5

In Person Payment Options



“

I have lots of staff working throughout the season and no one ever seems to know what's going on. Can FareHarbor help me **organize** and maybe automatically **notify** my staff so I'm not the only one coordinating?

”



**Dwight S.**  
Beet Farm Tours





## User Notifications

**Notifications can be fully customized per user!**



**New** booking notifications

**Rebooked** booking notifications

**Cancelled** booking notifications

**Automatic** Daily manifest links

CC disputes

And **more!**

**[ Via email and/or the FH App ]**





## User Notifications

Don't miss out on new bookings, cancellations, etc.:

Basic Info Password **Notifications** Permissions Defaults

Set up notifications for all items here. You can also turn on notifications for a single item by editing that item's settings. [How to set up notifications](#)

Notification type	Email Select: <a href="#">all</a> , <a href="#">none</a>	Mobile Select: <a href="#">all</a> , <a href="#">none</a>
<b>New bookings</b>		
<input checked="" type="checkbox"/> Only send notifications if user is crew for the availability		
Booked online	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Created by affiliates using FareHarbor	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Created by your Dashboard users	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Rebooked by your Dashboard users <small>Rebooked emails are sent for all types of bookings</small>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<b>Cancelled bookings</b>		
Booked online	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Created by affiliates using FareHarbor	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Created by your Dashboard users	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Receive the daily manifest link:

Notification type	Email Select: <a href="#">all</a> , <a href="#">none</a>	Mobile Select: <a href="#">all</a> , <a href="#">none</a>
<b>Manifest</b>		
Daily manifest link		
<input type="text" value="-6"/> hours before midnight every day	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<small>Only sent if you have bookings for that day</small>		
<b>Crew</b>		
When added or removed as a crew member	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Crew reminder		
<input type="text" value="24"/> hours before availability start time	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<small>Only sent if availability has bookings on it</small>		







## Crew Assignment

Assign your dashboard users as guides/drivers/captains etc. to availabilities

	Sun 10/9	Mon 10/10	Tue 10/11	Wed 10/12
Snorkeling Charter	8am 0 Marge Simpson	8am 0 Marge Simpson	8am 0 Marge Simpson	8am 0 Marge Simpson
Princess III Boat Charter	10am 0 150 Tour Guide: Frank Zappa	10am 0 150 Tour Guide: Frank Zappa		10am 0 150 Tour Guide: Frank Zappa
	12pm 0 150 Neil deGrasse Tyson	12pm 0 150 Neil deGrasse Tyson		12pm 0 150 Neil deGrasse Tyson
Ocean Dinner Cruise	5pm 0 10 Captain: Bob Marley	5pm 0 10 Captain: John Coltrane	5pm 0 10 Captain: Bob Marley	5pm 0 10 Captain: John Coltrane





## How to assign a crew member?

Friday, September 23rd 2022 @ 10:30am - 1:30pm

Bookable online ▾ 0 booked 3 available ▾ 0 crew ▾

0 booked

Availability notes:

No crew added to this availability.

+ Add crew member

How to use crew

0 crew ▾

No crew added to this availability

**Add crew member**

James Smith ▾

No role assigned ▾

Note (optional)

**Add** **Manage roles**

How to use crew



## Crew Assignment

You can then configure notifications tailored to your crew members' bookings. They can get notified:

- **When they get assigned to an availability**
- **When the start time is approaching (ex.: 24 hours before)**

Hi Captain Eva,

You've been added as "Captain" for:

### Ocean Dinner Cruise

Wednesday, August 31 2022 @ 5:00pm - 8:00pm

Manifest: <https://demo.fareharbor.com/evasdemodas/availabilities/?items=9980&availabilities=47583802>

Note: Departing On Time

● Ocean Dinner Cruise

**5pm - 8pm**

Bookable online ■ 2 booked □ 8 available  2 crew

Crew name	Role
Bob Marley	Captain
Frank Zappa	Tour Guide





## Crew Assignment

- ❑ **Subscribe** to Push Notifications on your mobile device with the **FareHarbor App!** (iOS/Android)
- ❑ Send “**added as crew**” notifications and reminders to your staff
- ❑ Send a **daily manifest** link the night before
- ❑ **Configure notifications** for new bookings, rebookings AND cancelled bookings



# Let's talk about **money**..

1

Custom Calendar Views

2

Custom Manifest Views

3

Users: notifications & crew assignment

4

**Adjustable Pricing Fields**

Customise prices for guests, add in custom fees, discounts or charges

5

In Person Payment Options





I would like to be able to **customize prices** and other details on my activities faster.



**Phil D.**  
Dunphy Magic Adventures





# Adjustable Pricing Custom Fields

Adding Expenses & Discounts via a new feature

## Old Version

5 ▼ -€0.05 cent discount (-€0.01)

2 ▼ -€2 euro discount (-€1)

Subtotal	€65.31
Taxes	€32.64
<b>Total</b>	<b>€97.95</b>
Set booking total to:	€ <input type="text"/> X
	€0.00 difference

## New Version

Internal discount

Choose an option ▼

- Staff
- Family & Friends
- Repeat Customer
- Senior

Internal discount

Staff X ▼

Changed price: -€20.00 ▼

€ -20  [Reset](#)

-Better integrated  
-More customizable





## Adjustable Pricing Custom Fields

Multiple fields compatible

Dropdown field:

Internal discount

Choose an option ▾

- Staff
- Family & Friends
- Repeat Customer
- Senior

Checkbox:

internal discount/expense

Change price ▾

€

Quantity field:

1 ▾ internal discount/expense

Change price ▾

€





## Adjustable Pricing Custom Fields

### Reporting

Easily break down the adjusted prices via or reporting tool:

			Custom Field Answers			
Value	Booking	Use Count	Subtotal	Total Tax	Total	Total Paid
Staff	#360271	1	€33.33	€16.67	€50.00	€0.00
Family & Friends	#360271	1	€46.67	€23.33	€70.00	€0.00
Repeat Customer	#360271	1	€53.33	€26.67	€80.00	€0.00
Senior	#360271	1	€53.33	€26.67	€80.00	€0.00
4 values	1 booking	4	€186.66	€93.34	€280.00	€0.00

## And **finally..**

1

Custom Calendar Views

2

Custom Manifest Views

3

Users: notifications & crew assignment

4

Adjustable Pricing Fields

5

**In Person Payment Options**

Speed up in-person checkouts and add extra fraud protection



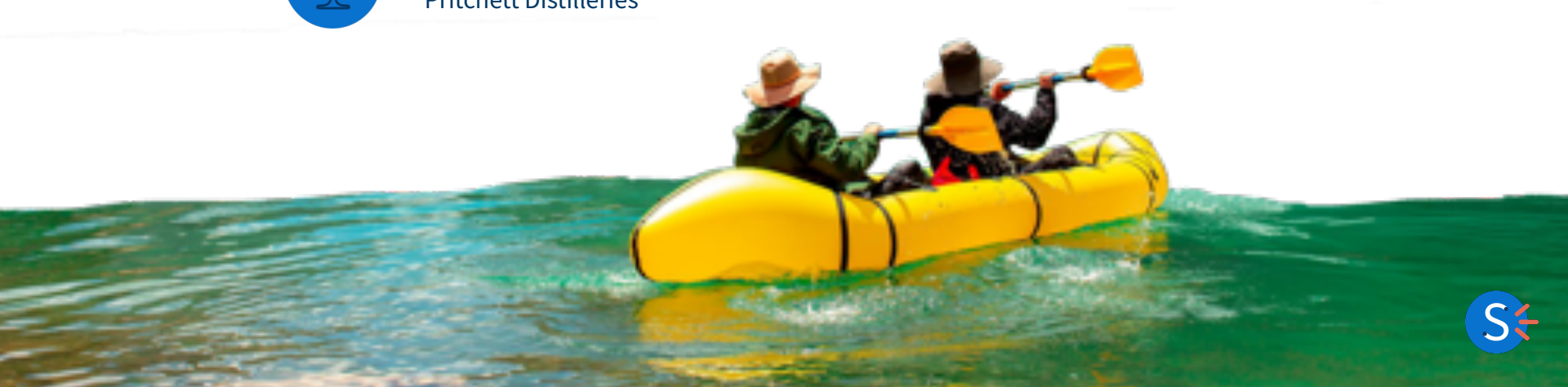
“

In my business we have a lot of **walk-up sales** and last minute reservations. Right now, we deal with a lot cash because typing in credit card info takes so long. Does FareHarbor have **faster checkout** options for in-person?

”



**Jay P.**  
Pritchett Distilleries





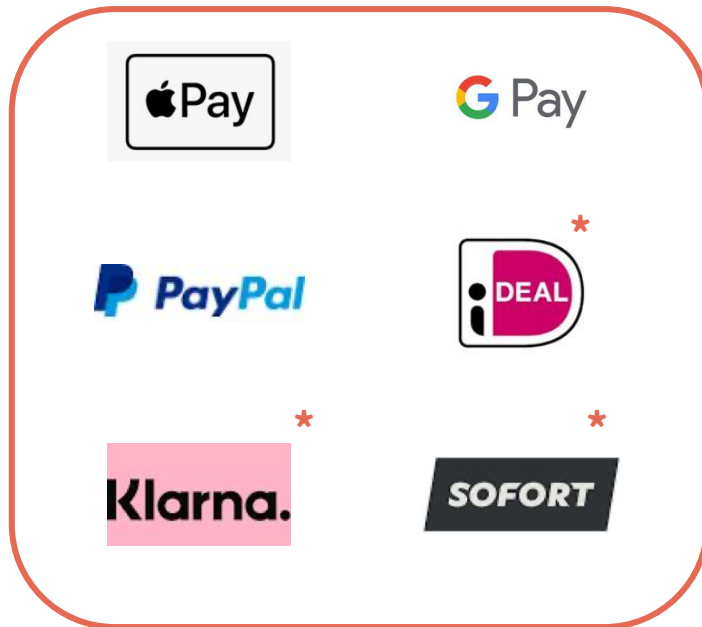
## Credit Card & Debit Card Payment Options

**Diversify your customers' payment options:**

**Better protection** against fraud

**Better traceability**

**Faster** for you and your customers



\* € Only. Not available in all regions





## In Person Payment Options

### FH-Compatible Card Readers (swipe & contactless):



### Advantages:

**Faster** transaction

**More** secure

**Higher success** rates on the first attempt





## In Person Payment Options

PAYMENT TYPE

Pay €100.00 with:

- Cash
- Bank Transfer
- Check
- In-House POS
- Charge card

## Customisable Payment Options (accounting only):

	Sales					
Payment type	Gross	Processing Fee	Net	Tax Paid	Payment Count	Refund Count
Affiliate	\$422.65	\$0.00	\$422.65	\$27.65	4	0
Credit card	\$1,599.65	-\$32.80	\$1,566.85	\$104.65	8	0
Cash	\$476.15	\$0.00	\$476.15	\$31.15	5	0
Check	\$64.20	\$0.00	\$64.20	\$4.20	1	0
Invoice	\$128.40	\$0.00	\$128.40	\$8.40	1	0
5 payment types	\$2,691.05	-\$32.80	\$2,658.25	\$176.05	19	0

# Summary



**Choose what you view**



**Stay informed**



**Gain flexibility in payments**

**THANK YOU!**

**[support@fareharbor.com](mailto:support@fareharbor.com)**





# Q+A

