

April 26, 2023

FAREHARBOR  
webinars



# Unlock the Power of Custom Fields

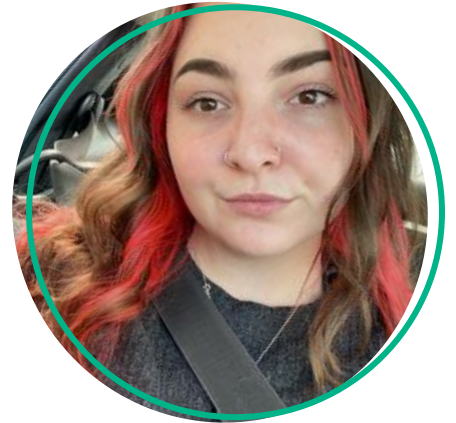




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# Today's Agenda

**Custom Field  
Basics**

**Setting Up &  
Editing a Custom  
Field**

**Adding a  
Custom Field to  
an Item**



# Poll

**How many of you are currently using custom fields in your book form?**

**→ I am!**

**→ Not yet... but I want to**



# Custom Fields Basics



# Custom Field Basics

## What is a custom field?

- Allows you to optimize your book form for your specific tours and activities
- These fields can be used to gather additional information just for you staff members

## Where to find custom fields?

1. Go to **Settings**
2. Find the **Sidebar**
3. Click on **Custom Fields**

## Who has access to custom fields?

- Only directors and managers have access to update and add custom fields
- Reservationist and guides can be added but it is a specific modification to type



# Managing Your Custom Fields

## Preview View

- Allows you to see approximately how a custom field will appear on your book form
- To find a specific field in this view:
  - Toggle between the custom field types
  - or**
  - Select “All” to view all of your existing custom fields

## Table View

- View all of your custom fields in a spreadsheet format to see all your custom fields at a glance
- You can see each custom fields’ type, title, and description, by default



# Custom Fields Basics

## Managing Custom Fields

### Custom Field Types

- Text input
- Checkbox
- Dropdown
- Quantity
- Transportation
- Code
- Code generator
- Waivers
- Labels





# Setting Up and Editing a Custom Field



# Poll

**Have you tried to set up a custom field on your own? What was the outcome?**

- Yes, and it worked
- Yes, but it had some errors
- Yes, and it didn't work
- No, I have not



# Setting Up a Custom Field

## Creating a New Custom Field

### Setting it up:

1. Go to **Settings > Custom Fields**
2. Click the **New custom field** button
3. Select the **Field type**
4. Fill in the rest of the options as needed (see [custom field options](#))
5. Check the **Private box** if you only want the field to be viewable to users logged into your Dashboard
6. Click **Create custom field**



# Setting Up a Custom Field

## Custom Field options

- Internal Name
- SKU
- Title
- Description
- If priced, change price of all customers on booking
- Private

## Custom Field options with additional steps:

- **Dropdown**
  - Price individual options
  - Add email notes
  - Edit visibility for individual options
- **Quantity dropdown**
  - Enter a minimum and maximum
- **Label**
  - Enter an internal name and description



# Editing a Custom Field

## How to:

1. Edit the settings at any time by clicking the **Settings** button
2. Options will vary depending on the custom field type



# Adding a Custom Field to an Item



# Adding Custom Field to..

## A customer type

1. Go to the **Items** section of your Dashboard and select the item you want to add the custom field to
2. Go to **Availability > Options & Prices**.
3. Under each applicable Customer type, click **Add custom field**
4. Select your custom field from the dropdown list
5. Click the **Add** button



# Adding Custom Field to..

## An entire booking

1. Go to the **Items** section of your Dashboard and select the item you want to add the custom field to
2. Go to **Availability > Options & Prices**
3. Select the **Whole-booking fields** tab
4. Under each applicable custom field group, click **Add custom field**
5. Select your custom field from the dropdown list
6. Click the **Add** button





# Adding or Removing a Custom Field to..

## Multiple items at once

1. Go to **Settings** > Price Sheets.
2. Click the **Overview tab**
3. Open the **Edit fields menu** from the top right and make sure **Add fields** is selected.
4. Choose your field from the dropdown
5. Select whether you're adding the field to individual **customer types** or to the **whole booking**:
  - a. If adding the field at the customer type level, select which items and customer types to add the field to
  - b. If adding the field at the whole booking level, select which custom field group to add the field to
6. Click **Add**



# Poll

**Do you feel equipped to make these changes on your own?**

- **Totally!**
- **Maybe after some practice.**
- **No, I could use some extra help.**



Thank you!





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

- [Tailor Your Dashboard with Custom Fields](#)
- [7 Must-Ask Customer Feedback Questions](#)



## FareHarbor Support

Please contact our **24/7 Support** if you have any questions pertaining to your dashboard!

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

**Phone:** (855)495-5551

## Help Docs

Fareharbor **help docs** can be found on your dashboard in the dropdown menu!



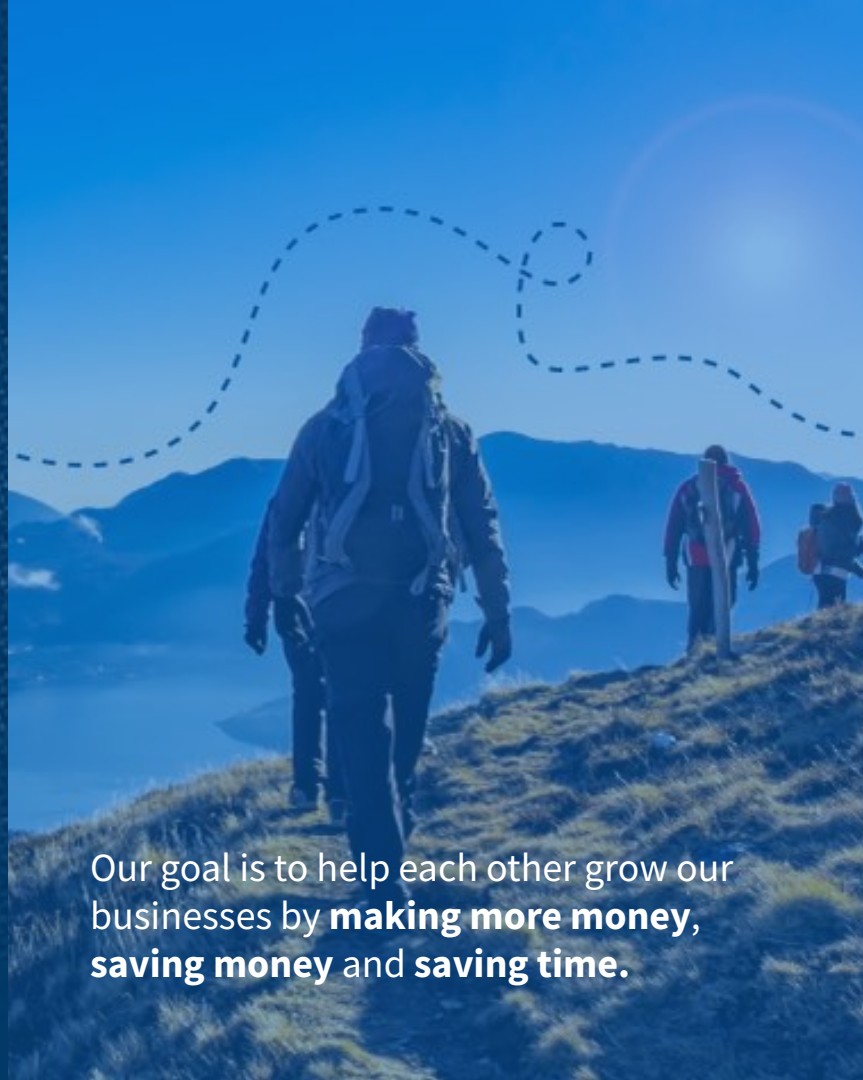
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# community

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Here you'll get to interact with our **FareHarbor experts** and with your fellow **tour/activity/attraction business owners** of all experience levels.



Our goal is to help each other grow our businesses by **making more money**, **saving money** and **saving time**.

# Q & A

