

May 11, 2023

FAREHARBOR
webinars



FareHarbor For You: Tools for the Reservationist

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Today's Agenda

Bookings

Payments

Resources



Poll

How would you categorize your Dashboard knowledge?

- Beginner
- Intermediate
- Advanced



What is a reservationist?

For the context of this presentation, a reservationist is someone who really only deals with bookings.



Bookings



All About Bookings

Creating Bookings

Bookings in the Dashboard

- Creating a regular booking
- Creating an order

Harry Styles

808-555-1234

Opt-in to text messages

harrystyles@example.com

Subscribe to company email list

Send confirmation email

Add booking note

0	Adults (\$30) Ages 16+ 0 on previous bookings
0	Children (\$15) Ages 3-15 0 on previous bookings
0	Infants Under Age 3 0 on previous bookings

Harry Styles
(R08) 555-1234 • harrystyles@example.com
ID: 11377

Edit contact 2 bookings + New booking for contact

Order #AXMT 2 bookings

Bike Rentals	5/11/23 @ 10am • 1 Tandem Bike	Paid #402035
Bike Rentals	5/12/23 @ 10am • 1 Tandem Bike	Paid #402036



All About Bookings

Creating Bookings

Bookings in the Dashboard

- Overbooking

Party Boat Rental
Tuesday, April 18th 2023 @ 10am

Overbooking availability by 1

Jane Smith

123-456-7890

jane@example.com

Subscribe to company email list
 Send confirmation email

[Add booking note](#)

2 ▾	Two Hour Charters Please select the number of boats for your group 0 on previous bookings
0 ▾	Three Hour Charters Please select the number of boats for your group 0 on previous bookings
0 ▾	Four Hour Charters Please select the number of boats for your group 0 on previous bookings



All About Bookings

Resource Overrides

24 <input data-bbox="1058 456 1116 511" type="button" value="+"/>	25 <input data-bbox="1431 456 1489 511" type="button" value="+"/>	26 <input data-bbox="1804 456 1862 511" type="button" value="+"/>
<input data-bbox="780 550 1122 612" type="text" value="2 max"/>	<input data-bbox="1155 550 1497 612" type="text" value="2 max"/>	<input data-bbox="1530 550 1872 612" type="text" value="2 max"/>
<input data-bbox="780 634 1122 696" type="text" value="0 max"/>	<input data-bbox="1155 634 1497 696" type="text" value="0 max"/>	<input data-bbox="1530 634 1872 696" type="text" value="0 max"/>



Poll

Which method or methods can you use to find a booking?

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



All About Bookings

Managing Bookings

Managing existing bookings is an important skill for a Reservationist.

Managing Bookings in the Dashboard

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



Checking Customers in on a Manifest

Example of a manifest prior to checking anyone in:

0 checked in
6 not checked in
Not checked in
Not checked in
Not checked in
Not checked in

Example of a manifest checking people in:

3 checked in
3 checked in 3 no-show
All checked in
1 Cruiser Bike checked in, 1 Cruiser Bike no-show
All checked in
All no-show



Payments



All About Payments

Payment Activities

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

Credit Cards In the Dashboard

- Credit card holds
- Releasing and Capturing Funds

Save or hold card ✕

[? How to use saved cards and holds >](#)

Enter a card to verify and save it to charge later:

Hold money on card

Hold amount:

\$ 500.00



All About Payments

Payment Activities

Taking payments is another important action for a reservationist

Gift Cards In the Dashboard

- Gift cards
- Redeeming a gift card



Choose a design



All About Payments

Payment Activities

Taking payments is another important action for a reservationist

Refunds In the Dashboard

- Issuing refunds

Visa 4242	\$344.50	
4/26/23 by Christopher Grossi	Details	
Don't refund	Partial refund	Full refund
Refund amount:	<input type="text" value="\$ 50"/>	<input type="button" value="📞 ▼"/>



Resources



Resources

Quick tips!

Help Docs

<https://help.fareharbor.com/>

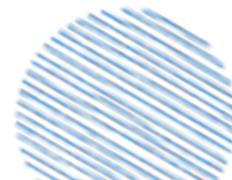
- General
- Dashboard
- Bookings
- ...and more!



Poll

What demonstration have you found most helpful today?

- Credit card holds
- Sending out canned messages to all bookings
- Starting orders
- Other (Let us know in the chat!)



Thank you!

Join us (*or tell your staff to..*) on **June 8th** for a re-run of this webinar!





Have you checked out Compass recently?

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:

- [The Complete Guide to Seasonal Staff Training](#)
- [7 Customer Service Tips to Give Your Guests an Amazing Experience](#)
- [FH Terminology Part 1: Dashboard & Booking Topics](#)



FareHarbor Support

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

Email: support@fareharbor.com

Phone: (855)495-5551

Help Docs

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



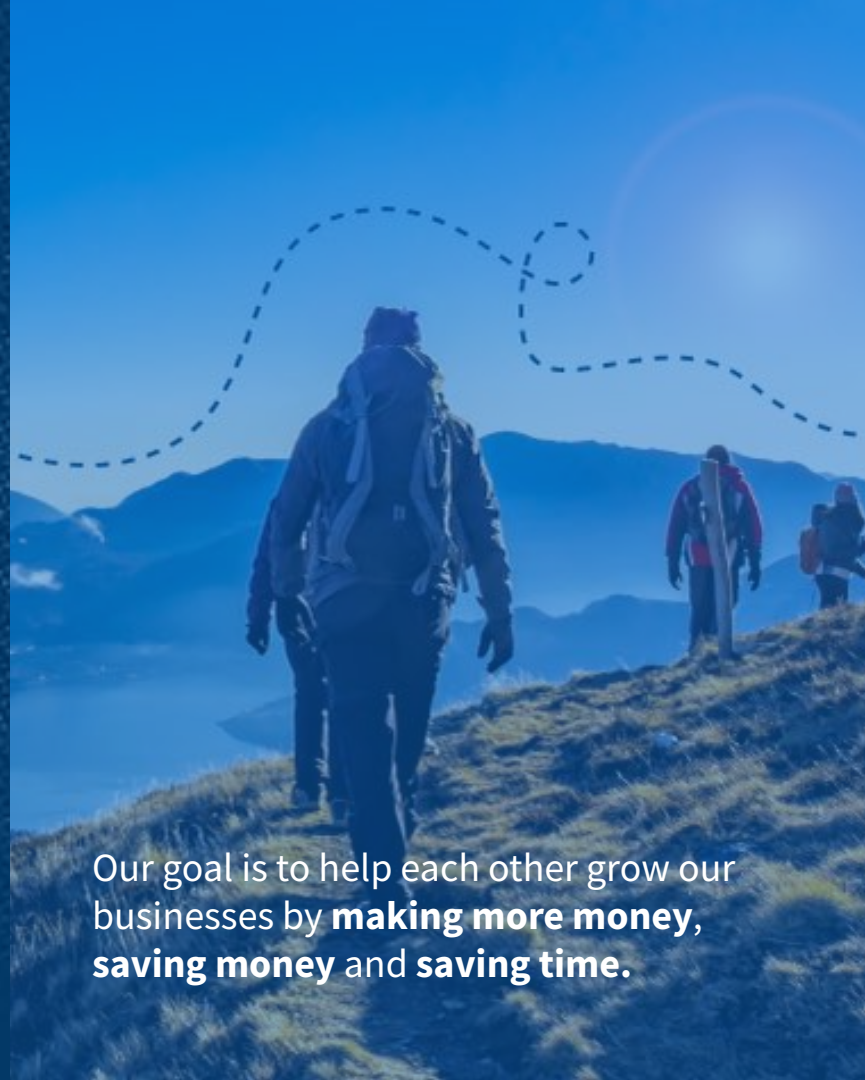
FAREHARBOR

community

Check out **FareHarbor's Official Community** page on Facebook!

Join us at **[Fareharbor.com/community](https://www.fareharbor.com/community)**

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

