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FAREHARBOR  
webinars



# FareHarbor For You: Tools for the Reservationist



# Rebecca Streiff

Senior Onboard Specialist

Denver, CO



# Christopher Grossi

Client Onboard Specialist II

Denver, CO



# 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 ▾	<b>Adults (\$30)</b> Ages 16+ 0 on previous bookings
0 ▾	<b>Children (\$15)</b> Ages 3-15 0 on previous bookings
0 ▾	<b>Infants</b> 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

#### Order #AXMT



# 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 ▾	<b>Two Hour Charters</b> Please select the number of boats for your group 0 on previous bookings
0 ▾	<b>Three Hour Charters</b> Please select the number of boats for your group 0 on previous bookings
0 ▾	<b>Four Hour Charters</b> Please select the number of boats for your group 0 on previous bookings





## All About Bookings

## Resource Overrides

24	+	25	+	26	+
2 max		2 max		2 max	
0 max		0 max		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



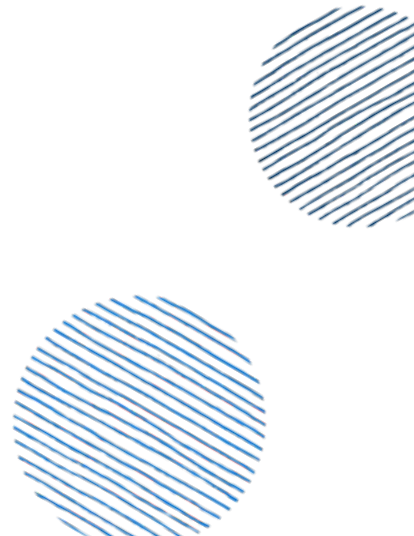
## All About Bookings

# 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

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





# Resources



## Resources

## Quick tips!

### Help Docs

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

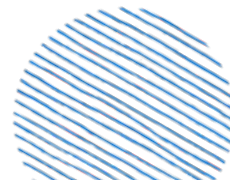
- General
- Dashboard
- Bookings
- ...and more!



# 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!









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

