

December 12, 2023

FAREHARBOR
webinars



3 Essential FareHarbor Reports To Wrap Up 2023

Today's Agenda

Introductions

**Essential
Reports**

**Bonus
Report!!!**



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Denver



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Denver



Sales Report



what is a sales
report?

Definition

- View detailed information about all transactions made within FareHarbor.


Also known as...

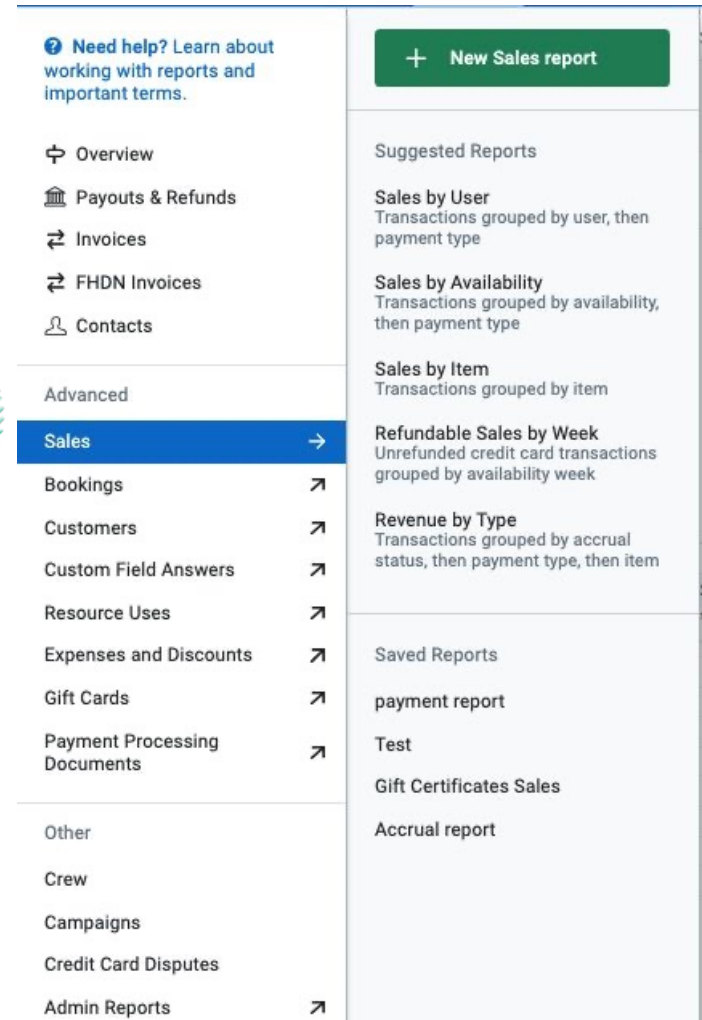
- The report on your total money collected



3 Ways to start a Sales Reports

- New Sales Report
 - Allows you to Create a sales report from scratch
- Suggested Sales Reports
 - Reports with preselected settings
- Saved Reports
 - Reports you have saved to access at later

 **TIP:** You can edit the options within any report to further customize the report to your exact needs.



The screenshot shows a sidebar menu on the left and a main content area on the right. The sidebar menu includes a 'Need help?' link, a 'New Sales report' button, and a list of report categories: Overview, Payouts & Refunds, Invoices, FHDN Invoices, Contacts, Advanced, Sales (highlighted), Bookings, Customers, Custom Field Answers, Resource Uses, Expenses and Discounts, Gift Cards, Payment Processing Documents, Other, Crew, Campaigns, Credit Card Disputes, and Admin Reports. The main content area displays 'Suggested Reports' with options like 'Sales by User', 'Sales by Availability', 'Sales by Item', 'Refundable Sales by Week', and 'Revenue by Type'. Below this is a 'Saved Reports' section with reports like 'payment report', 'Test', 'Gift Certificates Sales', and 'Accrual report'.

Suggested Sales Reports

Sales By User

A summary of transactions, broken down by which Dashboard user created the transaction

Sales by Availability

A summary of transactions grouped by availability or when the activity took place, then payment type

Sales by Item

A summary of transactions broken down per item



Suggested Sales Reports (cont'd)

Refundable Sales by Week

A summary of credit card transactions for the remainder of the year, grouped by availability week



Revenue by Type

A summary of transactions grouped by accrual status, then payment type, then item

Accrual Statuses:

- Recognized Revenue: Previously Collected
- Recognized Revenue: Collected
- Deferred Revenue

How to pull a Sales Report

1. Date Range

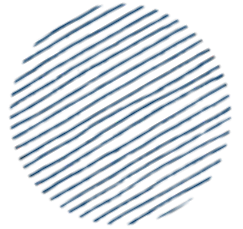
- Preset or Custom

2. What information you want to Report On

- Availability date, last booked date, booking created date, check-in date, payment created date, accrual date

3. Add Filters

- Used to narrow down the data in your report



How to pull a Sales Report (cont'd)

4. Groupings

- allows you to organize your data in different ways.

5. Columns

- Choose which information you want to include in your report by adding or removing columns.
- Summary vs Detailed



Columns shown in the *columns* section are based on the type of report you selected.

Terminology

Summary Report

View summarized information for the report settings you have chosen. Ideal for long ranges of time when a lot of data is being generated.

Detailed Report

View detailed data for each individual booking within your specified date range. Ideal for showing all pertinent information without expanding the report or going to “More detail”



Custom Field Answers Report



what is a
custom field
answers report?

Definition

- Analyze your custom field answers to gather information about your customers and activities.



Examples

- How your customers heard of your business
- See what addons were popular, additional comments etc.
- Find out which promo codes were used most often in a certain timeframe



How to Pull a Custom Field Answers Report

Customer Level Fields vs Booking - Level Fields

Customer - Level Field

Custom fields added directly to customer types

Booking - Level Field

Custom fields added to your whole booking section that will generally only show once. (common field - how did you hear about us)



English (US) ▾

← Choose a different date or time Fields marked with * are required

1 ▾	Race Bikes Fastest Option	\$45
0 ▾	Race Bikes Fastest Option	\$45
0 ▾	Cruiser Bikes Most Relaxed Option	\$35
0 ▾	Cruiser Bikes Most Relaxed Option	\$25
0 ▾	Tandem Biked For 2 People	\$50
0 ▾	Tandem Biked For 2 People	\$40
0 ▾	Fat Bikes	\$40

You're Booking

 **Bike Rentals**
Tuesday, December 5th 2023 @ 9am - 11am

Custom Field Connected to a Customer Type

Race Bike \$45 ✕
Please select experience level:
Choose an option ▾ *

Custom Fields on the Whole Booking Field

Comments

Any additional notes or requests?

\$5 Insurance

Choose a Sandwich:
Choose an option ▾

Add promo or discount code

Apply a gift card

Subtotal \$45.00
Taxes & Fees \$5.40
Total \$50.40

How to Pull a Custom Field Answers Report

1. Customer

- Level Fields vs Booking - Level Fields

2. Date Range

3. Report On

- Availability date, Last booked date, booking created date, Check-in date

4. Filter

- Must add a custom field filter in this report or the report will not show any data

5. Group By

6. Add Columns → (summary vs detailed)



Poll

Where do you usually go to find help for FareHarbor Reporting?

- Help Docs
- Compass
- Support
- FareHarbor Community



Bookings Report



what is a
bookings
report?

Definition

- Gather important insights about your bookings, such as which items or sources are most popular.

Also known as...

- The report on total number of bookings and customers

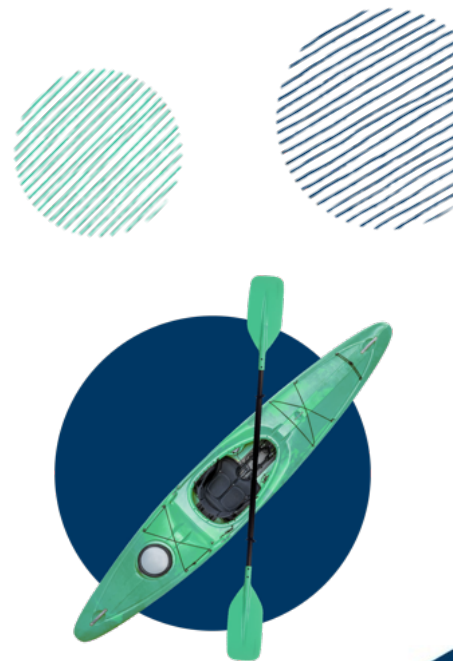


Features of a Booking Report

1. Date range
2. 'Report on' options
3. Filter → **Source**
4. Group by → **Month**
5. Adjusting order of grouped by
6. Summary vs detailed



TIP: Show most popular online items and emphasize highlighting those items on booking flows





Bonus: Campaign Report

Campaign Report

Definition

- With the Campaigns report, you can determine how many times your campaigns were used within a specific date range, which items they were used for, and their associated revenue.

Features of a Campaign Report

- This report is organized by campaign and then item. The third column will tell you the number of bookings made using each campaign.
- Below the Campaigns section, you'll find booking sums broken down by item. To see the total net revenue generated from all campaigns in the given timeframe.



Campaign Report

[Home](#)
[Bookings](#)
[Manifest](#)
[Reports](#)
[Items](#)
[Settings](#)

Report type Filters 01/01/2023 - 12/05/2023 Generate

Campaigns

Bookings for Sunday, January 1st 2023 – Tuesday, December 5th 2023
 Cancelled bookings: Include non-refunded cancelled bookings

Report accurate as of a few seconds ago Refresh Share Print Learn about this report

		Booking Sums					Affiliate Invoicing			
Campaign	Item	#	Subtotal	Tax	Total	% of Report Sum Booking Totals	Revenue Collected	Receivable from Affiliate	Payable to Affiliate	Net Revenue
Bikes	Bike Rentals	7	\$722.00	\$43.32	\$765.32	96.01%	\$0.00	\$0.00	\$0.00	\$0.00
		7	\$722.00	\$43.32	\$765.32	96.01%	\$0.00	\$0.00	\$0.00	\$0.00
Summer	ATV Rental	3	\$30.00	\$1.80	\$31.80	3.99%	\$0.00	\$0.00	\$0.00	\$0.00
		3	\$30.00	\$1.80	\$31.80	3.99%	\$0.00	\$0.00	\$0.00	\$0.00

		Booking Sums					Affiliate Invoicing			
Totals	Item	#	Subtotal	Tax	Total	% of Report Sum Booking Totals	Revenue Collected	Receivable from Affiliate	Payable to Affiliate	Net Revenue
Totals	Bike Rentals	7	\$722.00	\$43.32	\$765.32	96.01%	\$0.00	\$0.00	\$0.00	\$0.00
	ATV Rental	3	\$30.00	\$1.80	\$31.80	3.99%	\$0.00	\$0.00	\$0.00	\$0.00
		10	\$752.00	\$45.12	\$797.12	100%	\$0.00	\$0.00	\$0.00	\$0.00



poll

What report are you going to pull first after this presentation?

- Sales Report
- Custom Fields Report
- Booking Report
- Campaign Report



Thank you!





Resources



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:

- [3 FareHarbor Reports to Determine Customer Booking Patterns](#)
- [FH Terminology Part 2: Items, Settings & Reports](#)

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



Thank you!

