

December 14, 2023

# Data Unleashed:

## Elevating Your Business Through Reporting

FAREHARBOR  
webinars



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# Today's Agenda

**Before We  
Begin**

**Revenue  
Reports**

**Avail &  
Capacity  
Reports**



# Before We Begin



You should  
*know*

- The different customizable functions to a report such as Search By, Filters, Group By, & Columns
- The basic differences between a payout, sales, and booking report
- How to save & export a report



You should  
*want*

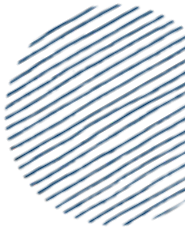
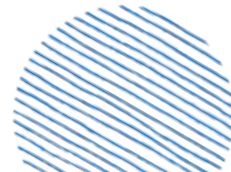
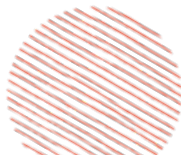
- More insight from your reports
- The ability to better customize standard reports
- To make data-driven decisions to increase operational efficiency and analyze your year





Keep in  
mind

- These example reports are just the **building** blocks
- We won't be showing full screenshots to **protect the privacy** of our partners
- Our goal is to **empower** you to use FareHarbor custom reporting to start identifying your needs & questions



## Pulse Check

On a scale from 1 -5, how do you feel about your advanced reporting skills?



Not very confident



Confident



Very confident





# Revenue Reporting



# Guide Gratuity



# When & Why

					Custom Field Answers	
Crew member	Crew role	Availability date	Availability	Value		Subtotal
Michelle	Guide	10/1/2023	10/1/23 @ 6:45pm – 8:15pm	No dropdown option selected		\$0.00
				15% Gratuity		\$35.40
				Tip at time of tour		\$0.00
				3 values		\$35.40

- Use to report on tips paid out in custom fields pre/post booking
- Report can be based on your setup for % or \$
- Utilize crew & users on the report to see who is owed what



Report type | Suggested reports | Saved reports | Share | Advanced reports help

## Custom Field Answers Generate

Hide

Field type to report on:  
 Customer-level fields  
 Booking-level fields

Dates:  
 Yesterday  
 12/04/2023 - 12/04/2023

Report on:

Filter: Custom Field Answers Bookings 1

Please add at least one custom field to run the Custom Field Answers report.

Answers from these custom fields:  
 Add custom field

Save Cancel

Group by:  
 ava

Custom Field Answer  
 Availability  
 Availability Status  
 Availability Date  
 Availability Week  
 Availability Month  
 Availability Year  
 Availability Hour

Columns:  
 Summary report  
 Detailed report

Summary Detail All

Find column

Custom field answer columns  
 Select: all, none, default  
 Use Count  
 Display Count

## Build This Report

Reports

Custom Field Answers →

+ New Custom Field Answers report

- **Start:** Reports > Custom Field Answers > New
- **Parameters:** Booking-level fields (usually), dates, & reporting on avail
- **Filter:** Add your tip custom field
- **Groups:** Crew, avail, custom field answer
- **Columns:** Summary
- **Generate**



# Gratuity Reporting

- This is a fairly simple custom report that can offer more value to your guides
- Don't have tips as an option on booking?
  - Be sure to consider reporting before enabling!
- Multiple crew on one availability?
  - This may not be a good fit
- **Remember** this is not a one size fits all solution and it will change based on your unique set up!

						Custom Field Answers
Crew member	Crew role	Availability date	Availability	Value	Subtotal	
Michelle	Guide	10/1/2023	10/1/23 @ 6:45pm – 8:15pm	No dropdown option selected	\$0.00	
				15% Gratuity	\$35.40	
				Tip at time of tour	\$0.00	
				<b>3 values</b>	<b>\$35.40</b>	



# Revenue By Type





# Revenue By Type - When and Why

	Sales					
Accrual status	Gross	Processing Fee	Net	Tax Paid	Payment Count	Refund Count
Recognized revenue: previously collected	\$43,329.80	-\$796.53	\$42,533.27	\$141.66	144	7
Recognized revenue: collected	\$86,211.13	-\$1,616.00	\$84,595.13	\$847.98	584	168
Deferred revenue: collected	\$13,921.72	-\$242.93	\$13,678.79	\$104.76	49	2
<b>3 accrual statuses</b>	<b>\$143,462.65</b>	<b>-\$2,655.46</b>	<b>\$140,807.19</b>	<b>\$1,094.40</b>	<b>777</b>	<b>177</b>

- Best for accurate revenue reporting
- Sales reports on accrual date
  - Recognized revenue previously collected
  - Recognized revenue collected
  - Deferred revenue collected



Report type | Suggested reports | Share

## Revenue by Type

Sales Transactions grouped by accrual status, then payment type, then item

Hide

Dates: Today | 11/28/2023 | 11/28/2023

Report on: Accrual date

Filter: Sales Bookings

Add Filter

Group by:

Find group:

- Accrual Status
- Payment Type
- Item
- Credit Card Type
- Payment Created By
- Booking
- Dispute Status
- Payment Date

Columns:

Summary report  
 Detailed report

Summary Detail All

Find column:

Sales columns  
Select: all, none, default

- Gross
- Processing Fees

Generate

## Build This Report

- **Start:** Reports > Sales > Revenue by Type
- **Parameters:** Dates & reporting on accrual date
- **Filter:** By accrual status, depending on your goals
- **Groups:** Accrual Status, Payment Type, Item
- **Columns:** Summary report
- **Generate**

Reports

Sales



Revenue by Type

Transactions grouped by accrual status, then payment type, then item



# Revenue Reporting

Accrual status	Sales					
	Gross	Processing Fee	Net	Tax Paid	Payment Count	Refund Count
Recognized revenue: previously collected	\$43,329.80	-\$796.53	\$42,533.27	\$141.66	144	7
Recognized revenue: collected	\$86,211.13	-\$1,616.00	\$84,595.13	\$847.98	584	168
Deferred revenue: collected	\$13,921.72	-\$242.93	\$13,678.79	\$104.76	49	2
3 accrual statuses	\$143,462.65	-\$2,655.46	\$140,807.19	\$1,094.40	777	177

- **Most accurate** way to report on revenue
- Typically we see this report filtered for one or two accrual statuses but not all three
- Sales and bookings filter options here to get more detailed
- We have a help doc dedicated to this report for future reference - [see here!](#)



# Affiliates



# Affiliates - When and Why

Affiliate	Gross	Processing Fee	Tax Paid	Booking ID	Created At <sup>1</sup>	Availability <sup>1</sup>	Net Revenue Collected	Invoice Total	Invoiced?
<b>Example: Claire's Kayaks</b>	\$170.00	\$0.00	\$0.00	#195809028	10/13/23 @ 10:16am	11/15/23 @ 10am - 11:45am	\$110.00	\$110.00	Invoiced
	\$210.00	\$0.00	\$0.00	#195888881	10/13/23 @ 7:26pm	11/7/23 @ 10am - 11:45am	\$150.00	\$150.00	Invoiced
	\$315.00	\$0.00	\$0.00	#196949988	10/21/23 @ 6:54pm	11/7/23 @ 12pm - 1:45pm	\$225.00	\$225.00	Invoiced
	\$210.00	\$0.00	\$0.00	#198222893	11/1/23 @ 12:23pm	11/5/23 @ 2pm - 3:45pm	\$150.00	\$150.00	No
	\$210.00	\$0.00	\$0.00	#198227073	11/1/23 @ 12:23pm	11/4/23 @ 4pm - 5:45pm	\$150.00	\$150.00	Invoiced
	\$170.00	\$0.00	\$0.00	#198495941	11/1/23 @ 5:33pm	11/4/23 @ 12pm - 1:45pm	\$110.00	\$110.00	Invoiced
	\$210.00	\$0.00	\$0.00	#198312702	11/2/23 @ 9:52am	11/21/23 @ 12pm - 1:45pm	\$150.00	\$150.00	Invoiced
	\$130.00	\$0.00	\$0.00	#198457278	11/3/23 @ 2:44pm	11/4/23 @ 4pm - 5:45pm	\$70.00	\$70.00	Invoiced
	\$40.00	\$0.00	\$0.00	#198495941	11/1/23 @ 5:33pm	11/4/23 @ 12pm - 1:45pm	\$110.00	\$110.00	Invoiced
	-\$210.00	\$0.00	\$0.00	#198222893	11/1/23 @ 12:23pm	11/5/23 @ 2pm - 3:45pm	\$150.00	\$150.00	No
	<b>\$1,455.00</b>	<b>\$0.00</b>	<b>\$0.00</b>			<b>0 availabilities</b>	<b>\$1,115.00</b>	<b>\$1,115.00</b>	

- Keep track of your affiliate payments & invoices
- Report on actual collected revenue
- FHDN Affiliate source





# Bookings

Advanced | Yesterday | 12/04/2023 - 12/04/2023 | Report on: Availability date | [Generate](#)

Report has not been run

Click the Generate button above to run your report.



Reports > Bookings → **+ New Bookings report**

## Build This Report

- **Start:** Reports > Bookings > New
- **Parameters:** Dates & reporting on avail
- **Filter:** Source = network, specific affiliate
- **Groups:** Affiliate
- **Columns:** Detailed report > add columns for invoiced?, invoice total, & net revenue collected
- **Generate**






# Affiliate Reporting

Affiliate	Gross	Processing Fee	Tax Paid	Booking ID	Created At <sup>1</sup>	Availability <sup>1</sup>	Net Revenue Collected	Invoice Total	Invoiced?
<b>Example: Claire's Kayaks</b>	\$170.00	\$0.00	\$0.00	#195809028	10/13/23 @ 10:16am	11/15/23 @ 10am - 11:45am	\$110.00	\$110.00	Invoiced
	\$210.00	\$0.00	\$0.00	#195888881	10/13/23 @ 7:26pm	11/7/23 @ 10am - 11:45am	\$150.00	\$150.00	Invoiced
	\$315.00	\$0.00	\$0.00	#196949988	10/21/23 @ 6:54pm	11/7/23 @ 12pm - 1:45pm	\$225.00	\$225.00	Invoiced
	\$210.00	\$0.00	\$0.00	#198222893	11/1/23 @ 12:23pm	11/5/23 @ 2pm - 3:45pm	\$150.00	\$150.00	No
	\$210.00	\$0.00	\$0.00	#198227073	11/1/23 @ 12:23pm	11/4/23 @ 4pm - 5:45pm	\$150.00	\$150.00	Invoiced
	\$170.00	\$0.00	\$0.00	#198495941	11/1/23 @ 5:33pm	11/4/23 @ 12pm - 1:45pm	\$110.00	\$110.00	Invoiced
	\$210.00	\$0.00	\$0.00	#198312702	11/2/23 @ 9:52am	11/21/23 @ 12pm - 1:45pm	\$150.00	\$150.00	Invoiced
	\$130.00	\$0.00	\$0.00	#198457278	11/3/23 @ 2:44pm	11/4/23 @ 4pm - 5:45pm	\$70.00	\$70.00	Invoiced
	\$40.00	\$0.00	\$0.00	#198495941	11/1/23 @ 5:33pm	11/4/23 @ 12pm - 1:45pm	\$110.00	\$110.00	Invoiced
	-\$210.00	\$0.00	\$0.00	#198222893	11/1/23 @ 12:23pm	11/5/23 @ 2pm - 3:45pm	\$150.00	\$150.00	No
	<b>\$1,455.00</b>	<b>\$0.00</b>	<b>\$0.00</b>			<b>0 availabilities</b>	<b>\$1,115.00</b>	<b>\$1,115.00</b>	

Affiliate

FareHarbor Distribution Network - USD 

**Note:** Click arrow for FHDN to see partner source!

- Net rev collected shows [revenue - (commission + processing fees)]
- Can use these same inputs on accrual reporting for end of year sales info



# Unpaid Bookings



# Unpaid Bookings - When and Why

Booking ID	Availability <sup>1</sup>	# of Pax	Total	Total Paid	Amount Due	Deposit
#156920652	2/23/23 @ 2pm - 3:30pm	7	\$1,050.00	\$525.00	\$525.00	Yes
#156063269	3/8/23 @ 1pm - 2:30pm	3	\$400.00	\$300.00	\$100.00	No
#168502083	7/7/23 @ 9am - 10:30am	12	\$1,080.00	\$960.00	\$120.00	No
#181352729	7/25/23 @ 9am - 10:30am	5	\$385.00	\$192.50	\$192.50	No
#182593465	7/29/23 @ 9am - 10:30am	4	\$380.00	\$340.00	\$40.00	No
#151528343	12/22/23 @ 2pm - 3:30pm	7	\$1,150.00	\$575.00	\$575.00	Yes
#195457549	12/23/23 @ 10pm - 12/24/23	8	\$2,050.00	\$1,025.00	\$1,025.00	Yes
#186724831	12/28/23 @ 12pm - 1:30pm	3	\$545.00	\$247.50	\$297.50	Yes
#200951333	12/28/23 @ 10pm - 12/29/23	2	\$550.00	\$275.00	\$275.00	Yes
#151204289	12/31/23 @ 10pm - 1/1/24	15	\$3,000.00	\$0.00	\$3,000.00	No

- Don't miss out on your money
  - ◆ Phone-in bookings that don't pay
  - ◆ Deposits
- Use this report to easily open underpaid bookings and make charges



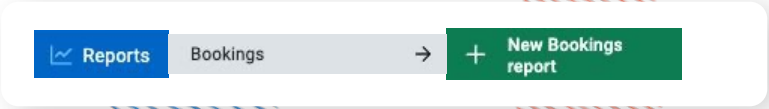
# Bookings

Generate

Advanced | Yesterday | 12/04/2023 - 12/04/2023 | Report on: Availability date

Report has not been run

Click the Generate button above to run your report.



## Build This Report

- **Start:** Reports > Bookings > New
- **Parameters:** Dates & reporting on avail
- **Filter:** Unpaid & underpaid bookings
- **Groups:** No groupings
- **Columns:** Detailed report > add deposit
- **Generate**



# Underpaid Bookings

Booking ID	Availability <sup>1</sup>	# of Pax	Total	Total Paid	Amount Due	Deposit
#156920652	2/23/23 @ 2pm – 3:30pm	7	\$1,050.00	\$525.00	\$525.00	Yes
#156063269	3/8/23 @ 1pm – 2:30pm	3	\$400.00	\$300.00	\$100.00	No
#168502083	7/7/23 @ 9am – 10:30am	12	\$1,080.00	\$960.00	\$120.00	No
#181352729	7/25/23 @ 9am – 10:30am	5	\$385.00	\$192.50	\$192.50	No
#182593465	7/29/23 @ 9am – 10:30am	4	\$380.00	\$340.00	\$40.00	No
#151528343	12/22/23 @ 2pm – 3:30pm	7	\$1,150.00	\$575.00	\$575.00	Yes
#195457549	12/23/23 @ 10pm – 12/24/23	8	\$2,050.00	\$1,025.00	\$1,025.00	Yes
#186724831	12/28/23 @ 12pm – 1:30pm	3	\$545.00	\$247.50	\$297.50	Yes
#200951333	12/28/23 @ 10pm – 12/29/23	2	\$550.00	\$275.00	\$275.00	Yes
#151204289	12/31/23 @ 10pm – 1/1/24	15	\$3,000.00	\$0.00	\$3,000.00	No

- Underpaid bookings happen for many reasons
- Get in the habit of looking at this report during your season
- **Make a schedule if using deposits or online payment links!**
- Can click into each booking and charge card on file, consider updating terms if you will be doing this frequently





# Pulse Check

On a scale from 1 -5, how are you feeling after these first couple reports?



Not very confident



Confident



Very confident





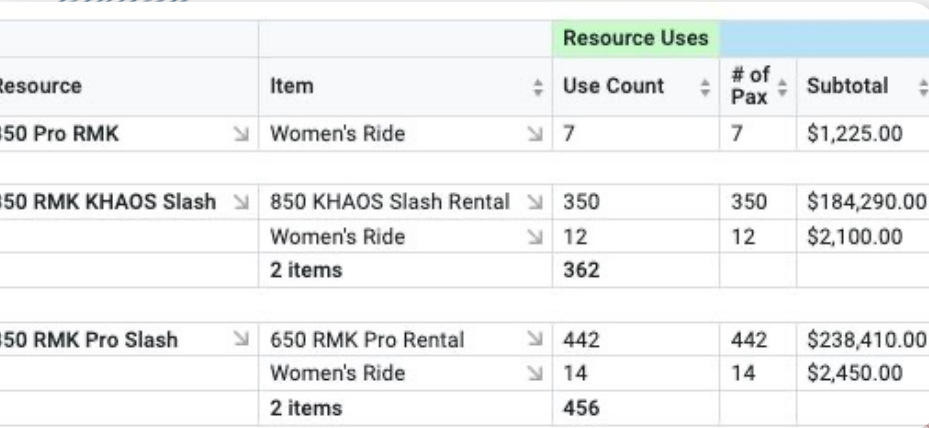
# Availability & Capacity Reporting



# Resources



# Resources - When and Why



Resource	Item	Resource Uses		
		Use Count	# of Pax	Subtotal
850 Pro RMK	Women's Ride	7	7	\$1,225.00
850 RMK KHAOS Slash	850 KHAOS Slash Rental	350	350	\$184,290.00
	Women's Ride	12	12	\$2,100.00
	<b>2 items</b>	<b>362</b>		
850 RMK Pro Slash	650 RMK Pro Rental	442	442	\$238,410.00
	Women's Ride	14	14	\$2,450.00
	<b>2 items</b>	<b>456</b>		

- Use to see when a resource was booked across multiple items/avails
- Keep track of inventory usage throughout the year or what might need to be updated before 2024
  - Group by avail month, item, sort by revenue, and more to determine where & when what resource brought the most value



Report type Suggested reports Saved reports Share Advanced reports help

## Resource Uses

Hide

Dates: Yesterday 12/05/2023 12/05/2023

Report on: Availability date

Filter: Resource Uses Customers Bookings 1

Add Filter

Group by: Find group

- Item
- Resource
- Booking
- Customer Type
- Customer Type (Item)
- Check-in Status
- Check-in Date
- Check-in Week

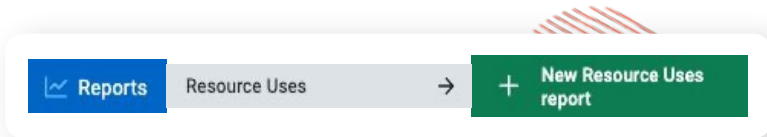
Columns: Summary report Detailed report

Summary Detail All

email

Resource Use columns Select all none default No available options

Customer columns



## Build This Report

- **Start:** Reports > Resource Uses > New
- **Parameters:** Dates & reporting on avail
- **Filter:** By resource or item as needed
- **Groups:** Item & resource
- **Columns:** Summary report
- **Generate**

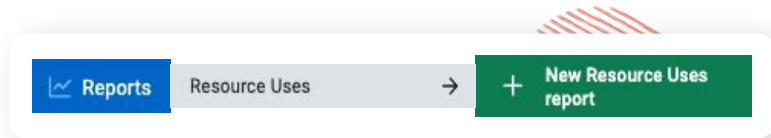


# Rebooking Resources - When and Why

Item	Resource	Availability	Use Count
Daily Unlimited Sandboarding	Bus 1	12/5/23 @ 10am	10
		12/5/23 @ 10:30am	8
		12/5/23 @ 11am	21
		12/5/23 @ 11:30am	2
		12/5/23 @ 12pm	28
		12/5/23 @ 12:30pm	17
		12/5/23 @ 1pm	21
		12/5/23 @ 1:30pm	21

- Also valuable during your season to reapply resources
- Examples of when you would rebook resources:
  - Resource rules changed on item
  - Time of avail changed





## Build This Report

- **Start:** Reports > Resource Uses > New
- **Parameters:** Dates & reporting on avail
- **Filter:** By resource or item as needed
- **Groups:** Item, resource, avail
- **Columns:** Summary report
- **Generate**





# Resource Use

## Grouped by Availability Day

		Resource Uses		
Availability day	Resource	Use Count	# of Pax	Subtotal
Sunday	850 RMK KHAOS Slash	43	43	\$19,260.00
	850 RMK Pro Slash	93	93	\$42,000.00
	2 resources	136		
Monday	850 RMK KHAOS Slash	27	27	\$13,765.00
	850 RMK Pro Slash	43	43	\$26,890.00
	2 resources	70		

## Grouped by Item

		Resource Uses		
Resource	Item	Use Count	# of Pax	Subtotal
850 Pro RMK	Women's Ride	7	7	\$1,225.00
850 RMK KHAOS Slash	850 KHAOS Slash Rental	350	350	\$184,290.00
	Women's Ride	12	12	\$2,100.00
	2 items	362		
850 RMK Pro Slash	650 RMK Pro Rental	442	442	\$238,410.00
	Women's Ride	14	14	\$2,450.00
	2 items	456		

## Grouped by Revenue

		Resource Uses	
Resource		Use Count	Subtotal
850 Pro RMK		7	\$1,225.00
850 RMK KHAOS Slash		362	\$186,390.00
850 RMK Pro Slash		454	\$240,090.00

## Grouped by Availability

		Resource Uses	
Resource	Availability	Use Count	
850 Pro RMK	3/11/23 @ 9am - 12pm	3	
	3/11/23 @ 2pm - 5pm	4	

# Capacity Reports



# Capacity Reports - When and Why

Item	Availability month	Availability day	# of Bookings	# of Pax
Dolphin Watch Tour	January 2023	Sunday	2	5
	March 2023	Sunday	11	44
		Tuesday	57	217
		Wednesday	55	210
		Thursday	92	335
		Friday	27	98
		Saturday	29	97
	6 days		271	1001
	April 2023	Sunday	24	82
		Monday	20	71
		Tuesday	66	248
		Wednesday	51	212
		Thursday	106	375
		Friday	5	13
		Saturday	20	62
	7 days		292	1063
	May 2023	Sunday	12	43
		Monday	15	60
		Tuesday	29	81
Wednesday		69	220	
Thursday		12	41	
Friday		30	97	
Saturday		41	108	
7 days		208	650	

- System reports on what was there and what was booked only, but we can still use this detailed data to analyze our schedules
- Consider bringing this data to another program to answer valuable questions such as what percentage of my availabilities were full?

Report type | Suggested reports | Saved reports | Share

### Bookings by Item

Bookings | Booking summary grouped by item

Generate

Hide

Dates: Yesterday | 12/05/2023 | 12/05/2023

Report on: Availability date

Filter bookings: Cancelled Status: uncanceled, cancelled > \$0 paid | Add Filter

Group by: Find group

- Item
- Voucher
- Availability
- Last Booked By
- Booking Created By
- Booking Cancelled By
- Source
- Paid Status

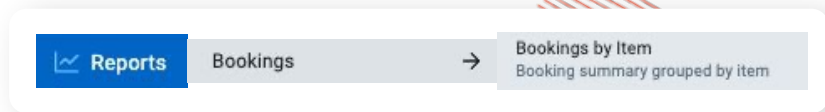
Columns: Summary report | Detailed report

Summary | Detail | All

Find column

Booking columns: Select: all | none | default

- # of Bookings
- # Cancelled



## Step 1: Gather Booking Data

- **Start:** Reports > Bookings > Bookings by Item
- **Parameters:** Dates & reporting on avail
- **Filter:** For item as needed
- **Groups:** Item, avail month, avail day
- **Columns:** Summary report
- **Generate**



Bookings Manifest Reports Items Settings

Calendar: Guided Hike Tour Filter Advanced

Update availabilities

1 Change:

COMMON

Online booking status

Capacity

Headline

Start time

Length

Notes

2 For these availabilities:

From To

01/01/2023 12/31/2023

Items 5 selected

Suggested filters:

Current note

3 To:

Set availability notes to:

TESTNOTE

Preview Markdown

**This update will change 1455 availabilities. Click below to finish.**

Complete update Edit options

## Step 2: Find Out Max Capacity Available

- The report shows us details into what was booked, now we need to know what was available to book as a whole
- Use your knowledge of your schedule or the avail updater to provide this info





# Capacity Reporting

## Step 3: Analyze Max Available vs. What Was Booked

- Gain insight on how full certain availabilities, avail months, avail days, or items were during the season
- Pull percentages of avail month and avail day to identify opportunities
- Different iterations of this could be grouping by resource or crew, or even using this for a customer type report

Item	Availability month	Availability day	# of Bookings	# of Pax
Dolphin Watch Tour	January 2023	Sunday	2	5
	March 2023	Sunday	11	44
		Tuesday	57	217
		Wednesday	55	210
		Thursday	92	335
		Friday	27	98
		Saturday	29	97
		6 days	271	1001
	April 2023	Sunday	24	82
		Monday	20	71
		Tuesday	66	248
		Wednesday	51	212
		Thursday	106	375
		Friday	5	13
		Saturday	20	62
		7 days	292	1063
	May 2023	Sunday	12	43
		Monday	15	60
		Tuesday	29	81
		Wednesday	69	220
		Thursday	12	41
		Friday	30	97
		Saturday	41	108
		7 days	208	650

# Repeat Customers



# Repeat Customers - When and Why

Booking ID	Created At	Last Booked By	Availability	Contact	# of Pax	Subtotal	list of names appearing more than twice	total value	list of names appearing more than twice (no blank cells)	total value (no blank cells)	Average spend per person booking more than 1 round trip in 2023
#179123506	2023-07-11 @ 02:38pm	Online	2023-07-12 @ 08:30am	Aaron XYZ	1	\$85.00	Aaron XYZ	\$235.00	Alexandra L	\$200.00	<b>\$648.60</b>
#179123508	2023-07-11 @ 02:38pm	Online	2023-07-12 @ 02:45pm	Aaron XYZ	1	\$50.00			Alexis	\$520.00	
#187205072	2023-08-18 @ 08:42am	Online	2023-08-19 @ 09:45am	Aaron XYZ	2	\$100.00			Aliete	\$630.00	

- Know your repeat customers if not using memberships
- Potential use cases for pulling repeat customers
  - Targeted email campaigns or invite-only events for your best guests
  - Analyze which items are most booked by repeat customers
- In this case, we used google sheets to find average spend per person for repeat customers to best price the new membership option



Report type | Suggested reports | Saved reports | Advanced reports help

## Bookings

Hide

Dates: Yesterday | 12/05/2023 | 12/05/2023

Report on: Availability date

Filter bookings: Cancelled Status: uncanceled, cancelled > \$0 paid

Group by: Find group

- Item
- Voucher
- Availability
- Last Booked By
- Booking Created By
- Booking Cancelled By
- Source
- Paid Status

Columns: Summary report | Detailed report

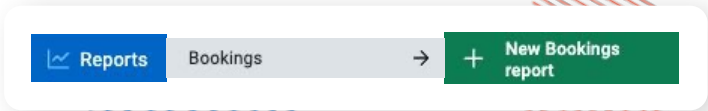
Summary | Detail | All

Find column

Booking columns: Select: all, none, default

- # of Bookings
- # Cancelled
- # Subscribed to text messages

Generate



## Step 1: Build This Report

- **Start:** Reports > Bookings > New Bookings
- **Parameters:** Dates & reporting on avail
- **Filter:** As needed
- **Groups:** No groupings
- **Columns:** Detailed report > add columns for email, subscribed to email
- **Generate**



Booking ID	Created At	Last Booked By	Availability	Contact	# of Pax	Subtotal
#179123506	2023-07-11 @ 02:38pm	Online	2023-07-12 @ 08:30am	Aar		
#179123508	2023-07-11 @ 02:38pm	Online	2023-07-12 @ 02:45pm	Aar		
#187205072	2023-08-18 @ 08:42am	Online	2023-08-19 @ 09:45am	Aar		

list of names appearing more than twice	total value	list of names appearing more than twice (no blank cells)	total value (no blank cells)	Average spend per person booking more than 1 round trip in 2023
Aaron XYZ	\$235.00	Alexandra L	\$200.00	<b>\$648.60</b>
		Alexis	\$520.00	
		Aliete	\$630.00	

Reports Bookings → + New Bookings report

## Step 2: Export and Analyze

- Long list of contacts will generate, export
- Note you could also pull a contacts report!
- Ideas for analyzing:
  - Pull a list of unique names when they show more than once, summarize revenue for that contact, gather emails for repeats, analyze location or item information
- Not an excel-expert?



# Conclusion





## Advanced Reporting Reminders

- **Every dashboard is unique**, there are many ways to accomplish the same goal depending on your setup
- **URLs of your exact report filters can be shared**, if you are in need of reporting help you can copy the URL and send this on for us to adjust with you
- **Sometimes more is more:** we can often combine detailed data from separate reports for valuable insights
- **The key** to building a valuable report **is starting with a valuable question!** Know what question you'd like to answer before diving in.



## Pulse Check

On a scale from 1 -5, how confident do you feel implementing the reports you learned today?



Not very confident



Confident



Very confident



## Our Favorite Reporting Help Docs

- <https://help.fareharbor.com/reporting/advanced-reports/overview/>
- <https://help.fareharbor.com/reporting/advanced-reports/settings/>
- <https://help.fareharbor.com/reporting/advanced-reports/saving/>
- <https://help.fareharbor.com/reporting/general-options/>
- <https://help.fareharbor.com/reporting/answering-common-questions/>
- <https://help.fareharbor.com/reporting/important-terms/>
- <https://help.fareharbor.com/reporting/types/overview/>



**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:**

- [Effective Ways to Earn More Tips as a Tour Guide](#)
- [Affiliate Rules: Take Charge of When Affiliates Can Book](#)
- [5 Tricks to Capture Repeat Business](#)

## 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!





FAREHARBOR

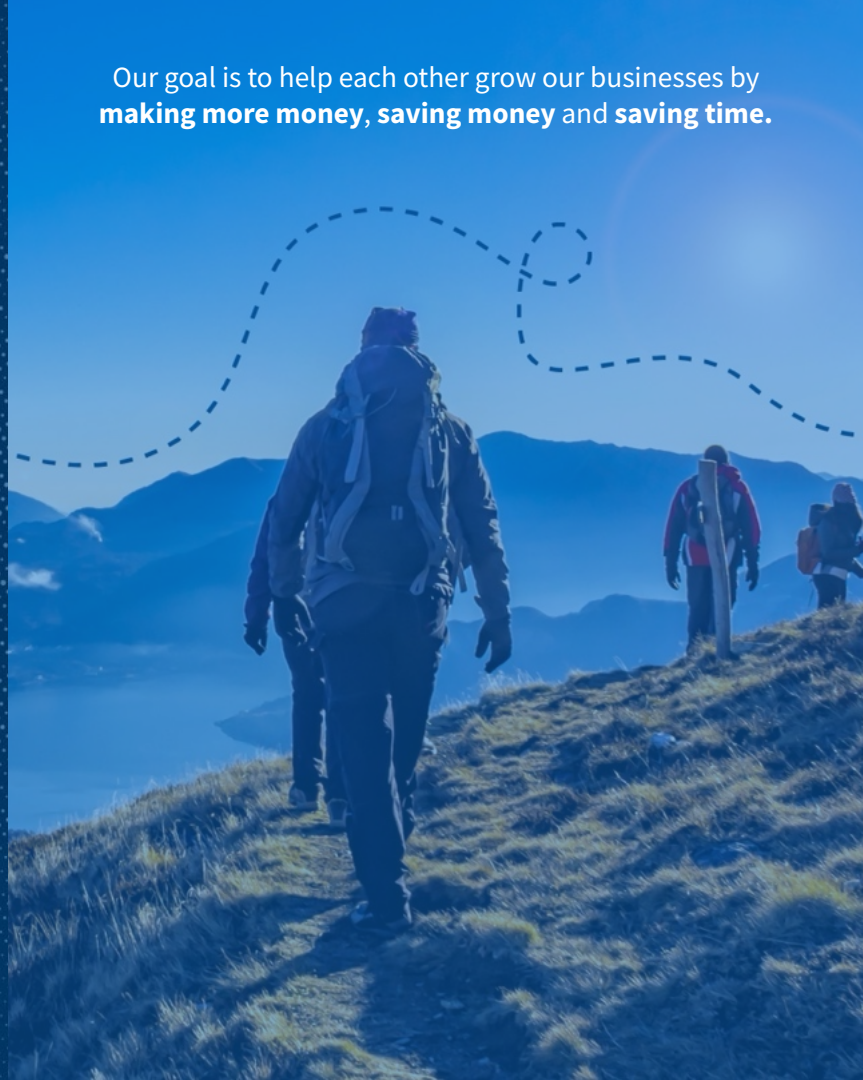
# community

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

