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FAREHARBOR
webinars



Unlock More \$\$\$ with the Power of Custom Fields



Emily Ghianda

Account Manager

Denver



Paige McGhee

Technical Support Specialist

Denver



Today's Agenda

**Custom Field
Basics**

**Setting Up &
Editing a Custom
Field**

**Adding a
Custom Field to
an Item**



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 director and manager permission groups have access to update and add custom fields
- Reservationist and guides can be added but it is a specific modification to type

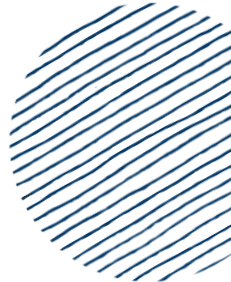
Custom Fields Basics



Managing Custom Fields

Custom Field Types

- Text input
- Checkbox
- Dropdown
- Quantity
- Transportation
- Code (*Promo code redemption*)
- Waivers (*if applicable*)
- Labels



Custom Field Use Cases



Use Cases

Add-ons & Upsells

- Anything that can be rented or purchased in-store, inform the customer on the book form and allow them to pre-purchase online!
 - A boat rental company has additional inventory that can be purchased as add-ons onto their boat rentals:

0



How many LilyPads would you like to rent?
(\$50)

0



How many Paddleboards would you like to rent?
(\$50)

- Drinks, food selections, merchandise:



\$100 Stock the cooler with Coors Light/Leatherback Beer for 6 Passengers or more

Coors Light and Leather back lager subject to availability



Use Cases

Gratuity

- Give customers the option to pre-pay gratuity online at the time of booking
 - Convenience of not needing to bring cash or worry about Venmo/cell service

A screenshot of a digital form for pre-paying gratuity. The form is white with rounded corners and a subtle shadow. It features two dropdown menus, each with the text "Choose an option" and a downward arrow. The first dropdown is preceded by the heading "Add gratuity!". Between the two dropdowns is the text "Your tips to our staff are greatly appreciated." followed by the question "How did you hear about us?". The form is decorated with blue and green diagonal line patterns on its left and right sides.

Add gratuity!

Choose an option

Your tips to our staff are greatly appreciated.

How did you hear about us?

Choose an option

- Include a gratuity on private tours
 - Private boat charters where a gratuity is already included in the booking total

+18% – Included Gratuity



Use Case & Case Study: Trip Protection



Trip Protection

- Allows your customers more cancellation flexibility, in exchange for a fee.
- **If purchased**, customers have the ability to cancel outside of your cancellation policy.
- **If purchased** and **needing to cancel**, they are entitled to receive a full refund, minus the amount trip protection and processing fees.
- **If purchased** and **not needing to cancel**, you still keep that amount - it's a win-win for you and your customers!



+15% Trip Protection

*Purchasing Trip Protection allows you to cancel or reschedule your tour at any time, for any reason, up to 2 hours prior to the tour start time. You will be reimbursed for the full amount of each ticket, **less the cost of trip protection and processing fees.***

Poll

Do you currently have trip protection implemented on your Dashboard?

- **Yes!**
- **Not yet, I want to learn more**
- **No, not my thing**



Case Study

Trip Protection

The operator: A FareHarbor client who added the **15% Trip Protection** option to their book form.

The results from 21 months:

- **34% of all bookings** choose trip protection
- After adding TP, checkout totals increased by **5% annually**
- Of the bookings that purchased TP, only **8% utilized the trip protection**, so that could be EITHER a refund OR reschedule!



Recommendations

Trip Protection

- Price trip protection at **15% of the booking sub-total**.
- Allow cancellation up to 30 minutes or 1-3 hours.
- Make your **default cancellation policy stricter**
 - This makes trip protection more appealing and entices customers to purchase.
- Only add trip protection to online/direct sales

Note: These are our recommendations and can be adjusted to fit your specific business needs.



Poll

For those who said no earlier to TP, did that case study interest you enough to add it to your dashboard?

- **Sure did!**
- **Maybe, I still want to learn more.**
- **No, still not my thing**



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

The screenshot shows a web browser window displaying a booking management interface. The browser's address bar shows the URL: `demo.fareharbor.com/treetopparkpaigemcgee/dashboard/bookings/grid/2024-02-22/`. The interface includes a navigation bar with tabs for 'Bookings', 'Manifest', 'Reports', 'Items', and 'Settings'. Below the navigation bar, there are controls for 'Grid', 'Setup', 'Calendar: Guided', 'Filter', and 'Advanced'. A search bar labeled 'Search bookings' is also present. The main content area displays a booking grid for 'Canopy Tour' with columns for dates from Thursday 2/22 to Wednesday 2/28. Each date column contains three time slots: 12pm, 3pm, and 5pm. Each time slot is represented by a small orange box with a lock icon and a '0' below it, indicating no bookings are currently present for these slots.

Start date	Thu 2/22	Fri 2/23	Sat 2/24	Sun 2/25	Mon 2/26	Tue 2/27	Wed 2/28
Canopy Tour	12pm 0	12pm 0	12pm 0	12pm 0	12pm 0	12pm 0	12pm 0
	3pm 0	3pm 0	3pm 0	3pm 0	3pm 0	3pm 0	3pm 0
	5pm 0	5pm 0	5pm 0	5pm 0	5pm 0	5pm 0	5pm 0



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..

A whole booking field

The screenshot shows a web browser window displaying a booking dashboard. The browser's address bar shows the URL: `demo.fareharbor.com/treetopparkpaigemcghee/dashboard/bookings/grid/2024-02-22/`. The dashboard has a blue header with navigation links: **Bookings**, **Manifest**, **Reports**, **Items**, and **Settings**. The user's name, **Paige McGhee**, is visible in the top right. Below the header, there are controls for **Grid**, **Setup**, **Calendar: Guided**, **Filter**, and **Advanced**. A search bar labeled **Search bookings** is also present. The main content area is a calendar grid for the week of February 22nd to 28th, 2024. The **Canopy Tour** activity is listed on the left. Each day's column contains three booking slots: 12pm, 3pm, and 5pm. Each slot is represented by a light orange box with a lock icon and a '0' in a circle, indicating no bookings are currently made. The interface is clean and modern, with a white background and blue accents.

Start date	Thu 2/22	Fri 2/23	Sat 2/24	Sun 2/25	Mon 2/26	Tue 2/27	Wed 2/28
Canopy Tour	12pm 0	12pm 0	12pm 0	12pm 0	12pm 0	12pm 0	12pm 0
	3pm 0	3pm 0	3pm 0	3pm 0	3pm 0	3pm 0	3pm 0
	5pm 0	5pm 0	5pm 0	5pm 0	5pm 0	5pm 0	5pm 0



Adding Custom Field to..

A whole booking field

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

The screenshot shows a web browser window displaying a dashboard for 'Paige McGhee's Treetop Park'. The main content is a grid of bookings for 'Canopy Tour' across several dates from Thursday, 2/22 to Wednesday, 2/28. Each date has three time slots: 12pm, 3pm, and 5pm. Each time slot contains a lock icon, a time label, and a small square icon with a zero inside. A notification banner at the top right of the dashboard reads 'Payments setup checklist not completed'. The browser's address bar shows the URL: demo.fareharbor.com/treetopparkpaigemcgee/dashboard/bookings/grid/2024-02-22/. The browser's taskbar at the bottom shows various application icons, including a calendar icon displaying '22'.

Start date	Thu 2/22	Fri 2/23	Sat 2/24	Sun 2/25	Mon 2/26	Tue 2/27	Wed 2/28
Canopy Tour	12pm 0	12pm 0	12pm 0	12pm 0	12pm 0	12pm 0	12pm 0
	3pm 0	3pm 0	3pm 0	3pm 0	3pm 0	3pm 0	3pm 0
	5pm 0	5pm 0	5pm 0	5pm 0	5pm 0	5pm 0	5pm 0



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**



Logic



Having a
custom
field
appear
only if...

Another is selected:

The screenshot shows a web browser window displaying a booking management interface. The URL is demo.fareharbor.com/treetopparkpaigemcgee/dashboard/bookings/grid/2024-02-22/. The interface includes a navigation bar with 'Bookings', 'Manifest', 'Reports', 'Items', and 'Settings'. Below the navigation bar, there are controls for 'Start date', 'Calendar: Guided', 'Filter', and 'Advanced'. The main content area displays a calendar grid for the week of February 22nd to 28th, 2024. The 'Canopy Tour' activity is selected for the date Thu 2/22. The calendar shows slots for 12pm, 3pm, and 5pm on each day from Thu 2/22 to Wed 2/28.

	Thu 2/22	Fri 2/23	Sat 2/24	Sun 2/25	Mon 2/26	Tue 2/27	Wed 2/28
Canopy Tour	12pm 0/0 3pm 0/0 5pm 0/0	12pm 0/0 3pm 0/0 5pm 0/0	12pm 0/0 3pm 0/0 5pm 0/0	12pm 0/0 3pm 0/0 5pm 0/0	12pm 0/0 3pm 0/0 5pm 0/0	12pm 0/0 3pm 0/0 5pm 0/0	12pm 0/0 3pm 0/0 5pm 0/0



Having a custom field appear only if...

Another is selected:

1. Click on **Item > Options and Prices**
2. Click the custom field you want to appear if something else is selected.
3. Select **Logic > Add Condition**
4. In the “**show this custom field when**” drop down select the custom field you want to be selected first for this custom field to appear.
5. Another drop down will pop up for you to set your restrictions.



Visibility



Visibility

Manage who can see your custom fields

- Select if you only want direct users to see the custom field.
- OR select if you only want online users to see the custom field.



Visibility

For all items

1. Select the custom field you want to change.
2. Select your “**Base**” price sheet at the top of the screen.
3. Change the price sheet to either “**online**” or “**direct**.”
4. In the “**Visibility**” column click on “**Inherit**” and change it to “**Hidden**.”



Visibility

For all items

The screenshot displays a web application interface for managing bookings. The main content area is a calendar grid for the 'Canopy Tour' item, showing time slots for each day from Thursday 2/22 to Wednesday 2/28. The time slots are 12pm, 3pm, and 5pm. The interface includes a navigation bar with 'Bookings', 'Manifest', 'Reports', 'Items', and 'Settings' menus, and a search bar. The browser address bar shows the URL 'demo.fareharbor.com/treetopparkpaigemcgee/dashboard/bookings/grid/2024-02-22/'.

Start date	Thu 2/22	Fri 2/23	Sat 2/24	Sun 2/25	Mon 2/26	Tue 2/27	Wed 2/28
Canopy Tour	12pm 0/20	12pm 0/20	12pm 0/20	12pm 0/20	12pm 0/20	12pm 0/20	12pm 0/20
	3pm 0/0	3pm 0/0	3pm 0/0	3pm 0/0	3pm 0/0	3pm 0/0	3pm 0/0
	5pm 0/0	5pm 0/0	5pm 0/0	5pm 0/0	5pm 0/0	5pm 0/0	5pm 0/0



Visibility

For all items

1. Select the custom field you want to change.
2. Select your “**Base**” price sheet at the top of the screen.
3. Change the price sheet to either “**online**” or “**direct**.”
4. In the “**Visibility**” column click on “**Inherit**” and change it to “**Hidden**.”



Visibility

For one specific item

The screenshot shows a web browser displaying a booking grid for 'Canopy Tour' on the website 'demo.fareharbor.com'. The interface includes a navigation bar with 'Bookings', 'Manifest', 'Reports', 'Items', and 'Settings'. The main content area shows a calendar grid for the week of February 22nd to 28th, 2024. The 'Canopy Tour' row is highlighted, and the 'Thu 2/22' column is also highlighted. The grid shows three time slots (12pm, 3pm, and 5pm) for each day, with a lock icon and a '0' indicating no bookings.

Start date	Thu 2/22	Fri 2/23	Sat 2/24	Sun 2/25	Mon 2/26	Tue 2/27	Wed 2/28
Canopy Tour	12pm 0	12pm 0	12pm 0	12pm 0	12pm 0	12pm 0	12pm 0
	3pm 0	3pm 0	3pm 0	3pm 0	3pm 0	3pm 0	3pm 0
	5pm 0	5pm 0	5pm 0	5pm 0	5pm 0	5pm 0	5pm 0



Making the Custom Field...



Required

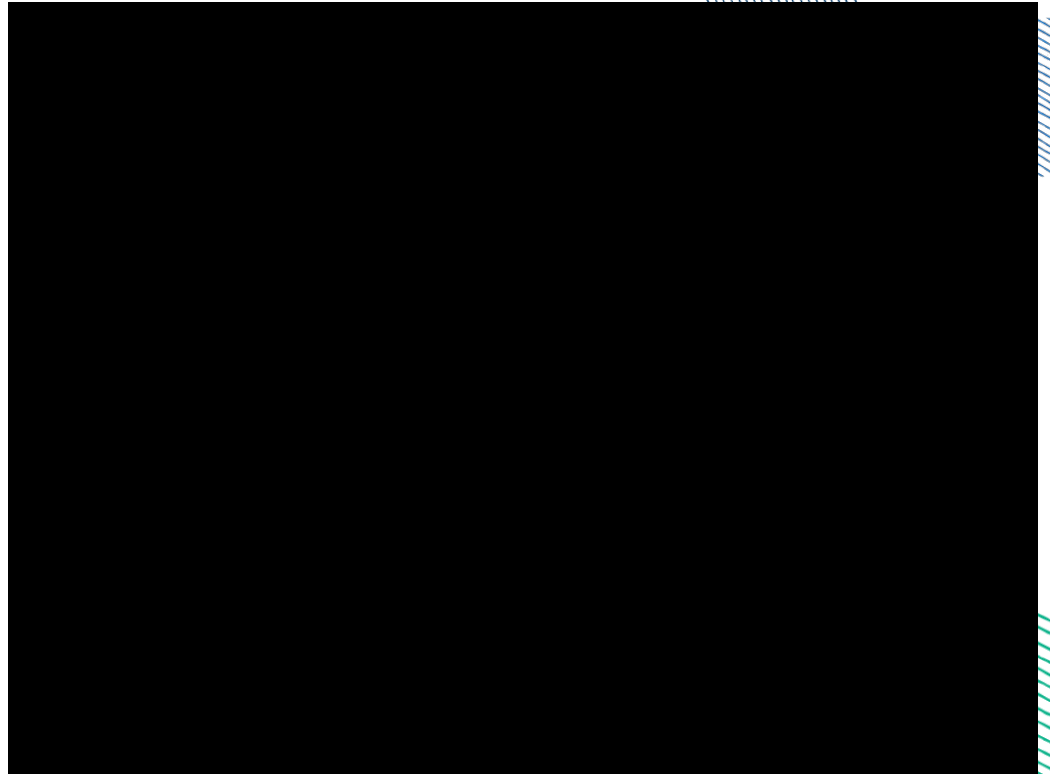
1. Click on the visibility column option
2. Click on “**Visible**”
3. Check off box that says “**Require an Answer**”
and press save

Note: You cannot make the field required on
“Quantity” custom fields

Making the Custom Field...



Required



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!





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

