



FAREHARBOR

# SPARK

Explore. Connect. Ignite.



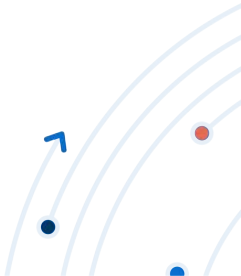
## Jake Karp

Enterprise Technical Support Specialist, Denver



## Staci McMullan

Technical Support Manager, Denver

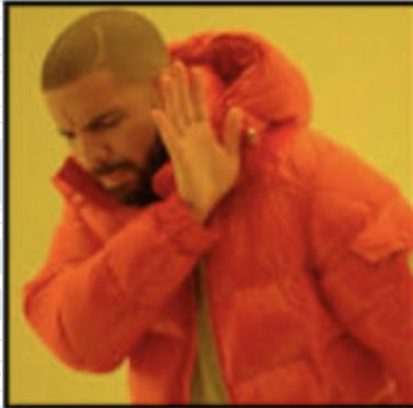


# Harnessing Your FareHarbor Dashboard's Brainpower

For Optimal Inventory Management

Use your “brain” to make your daily operations easier!

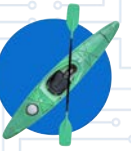




**BASIC  
PRESENTATIONS**



**PRESENTATIONS  
WITH MEMES**





## What industry segment do you belong to?

- Attractions
- Tours
- Transportation
- Recreational Activities or rentals
- Gaming
- Other



# Why Resources?



1

## Optimize + Diversify Bookings

Ensure real time availability across multiple items

2

## Track Your Valuable Resources

Quickly display your used and available resources in your dashboard

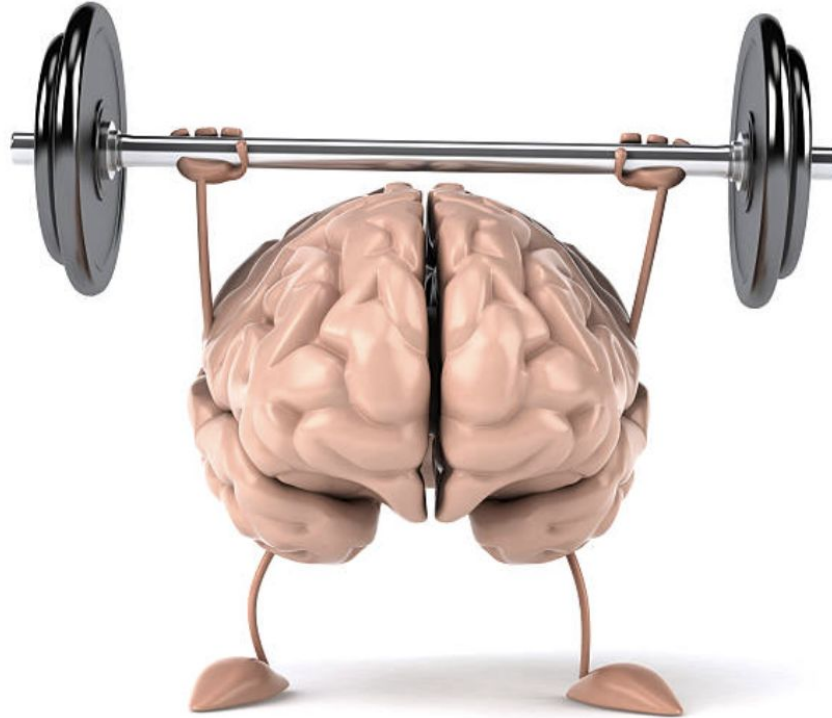
3

## Eliminate Time Spent Manually Tracking Resources

Let the dashboard do the work for you



# The Brain of the Dashboard



# Objectives



Resource  
Basics



Common  
Applications



Automating  
Resources



Tracking  
Resources



# Resource Basics



# What Can Resources Do?

Thursday, August 24th 2023 ▾

Resource	9am	10am	11am	12pm	1pm	2pm
Catamaran 1 Seats	15 used					
	15 max					
	0 free					
Catamaran 2 Seats	15 used	0 used	15 used		8 used	
	15 max					
	0 free	15 free	0 free		7 free	
Catamaran 3 Seats	0 used		15 used			
	15 max					
	15 free		0 free			

Display Real Time Availability

12pm Catamaran Hourly Rental  
1 14

1pm Catamaran Hourly Rental  
0 0

2pm Catamaran Hourly Rental  
0 0

3pm Catamaran Hourly Rental

Actions & Settings

Manifest

+ Duplicate

One Hour Rentals 0 14

Two Hour Rentals 0 14

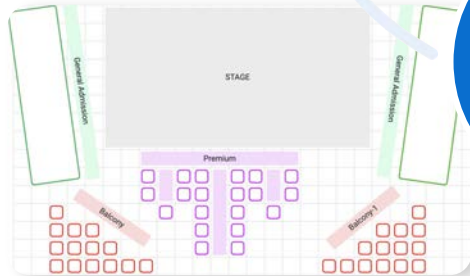
Three Hour Rentals 1 14

3pm Catamaran Hourly Rental

Track & Display Inventory Usage

Time blocking for inventory maintenance

Display Visual Maps



Catamaran Available + Cleaning Buffer

or: One Hour Rental  
Do not allow split parties (1 option)

Use 1 of Catamaran 1 Seats  
From: Availability start  
To: For 1.25 hours

+ Add requirement option

For: Two Hour Rental  
Do not allow split parties (1 option)

Use 1 of Catamaran 1 Seats  
From: Availability start  
To: For 2.25 hours

+ Add requirement option

For: Three Hour Rental  
Do not allow split parties (1 option)

Use 1 of Catamaran 1 Seats  
From: Availability start  
To: For 3.25 hours





## What are you hoping to accomplish with resources?

- Display real time availability
- Automatic time blocking for inventory maintenance
- Track and display inventory usage
- Other/I'm just here to learn



# Real-Life Application



# Using Resources in Real Life

## Michael McClay

CEO/CO-FOUNDER (LEFT)

Michael grew up in the Midwest outside of Chicago with a lifelong passion for the water. When he moved to Ft. Lauderdale three years ago he realized he found his home on the water in South Florida. Michael's goal now is to show as many people as possible (whether a visiting tourist or permanent resident), a good time on the water. He believes the best way of succeeding at this is to make it extremely easy, convenient and fun for all customers.

## Andrew Cohen

CEO/CO-FOUNDER (RIGHT)

Andrew Cohen was born and raised right in Ft Lauderdale. During his numerous young 20's jobs, such as Scuba Instructor, Navy dolphin trainer, and Yachtie, he completed his MBA through London School of Business and Finance. He moved back to Florida in 2016 to create a company following his passion: "to show people a great time". With complementary attributes, Andrew and Mike continue to work together to create a one of a kind company geared towards fun on the water.





# Staying Afloat Party Boat-Set Up

Manifest | Reports | Items | Settings

Items | Resources

+ New resource ▾ | ⚙️ ▾

ID	Name	Max Uses
30415	Boat 1	1
30417	Boat 2	1
30418	Boat 3	1
46142	Boat 4	1
47935	Boat 5	0

Name	Status
Private Party Boat- 4 Hour	On
Private Party Boat- 6 Hour	On
Private Party Boat- 8 Hour	On

**Party Boat (3 Boats)**

For: Every customer  
Allows split parties (3 options)

Only the first available requirement option will be used:

- Use 1 of Boat 1  
For length of availability
- Use 1 of Boat 2  
For length of availability
- Use 1 of Boat 3  
For length of availability

+ Add requirement option  
+ Add requirement

---

**Party Boat (2 Boats)**

For: Every customer  
Allows split parties (2 options)

Only the first available requirement option will be used:

- Use 1 of Boat 1  
For length of availability
- Use 1 of Boat 2  
For length of availability

+ Add requirement option  
+ Add requirement

Customer types | Whole-booking fields | Resource requirements

**Party Boat (4 Boats)**

For: Every customer  
Allows split parties (4 options)

Only the first available requirement option will be used:

- Use 1 of Boat 1  
For length of availability
- Use 1 of Boat 2  
For length of availability
- Use 1 of Boat 3  
For length of availability
- Use 1 of Boat 4  
For length of availability

+ Add requirement option  
+ Add requirement

**Party Boat (5 Boats)**

For: Every customer  
Allows split parties (5 options)

Only the first available requirement option will be used:

- Use 1 of Boat 1  
For length of availability
- Use 1 of Boat 2  
For length of availability
- Use 1 of Boat 3  
For length of availability
- Use 1 of Boat 4  
For length of availability
- Use 1 of Boat 5  
For length of availability

+ Add requirement option  
+ Add requirement

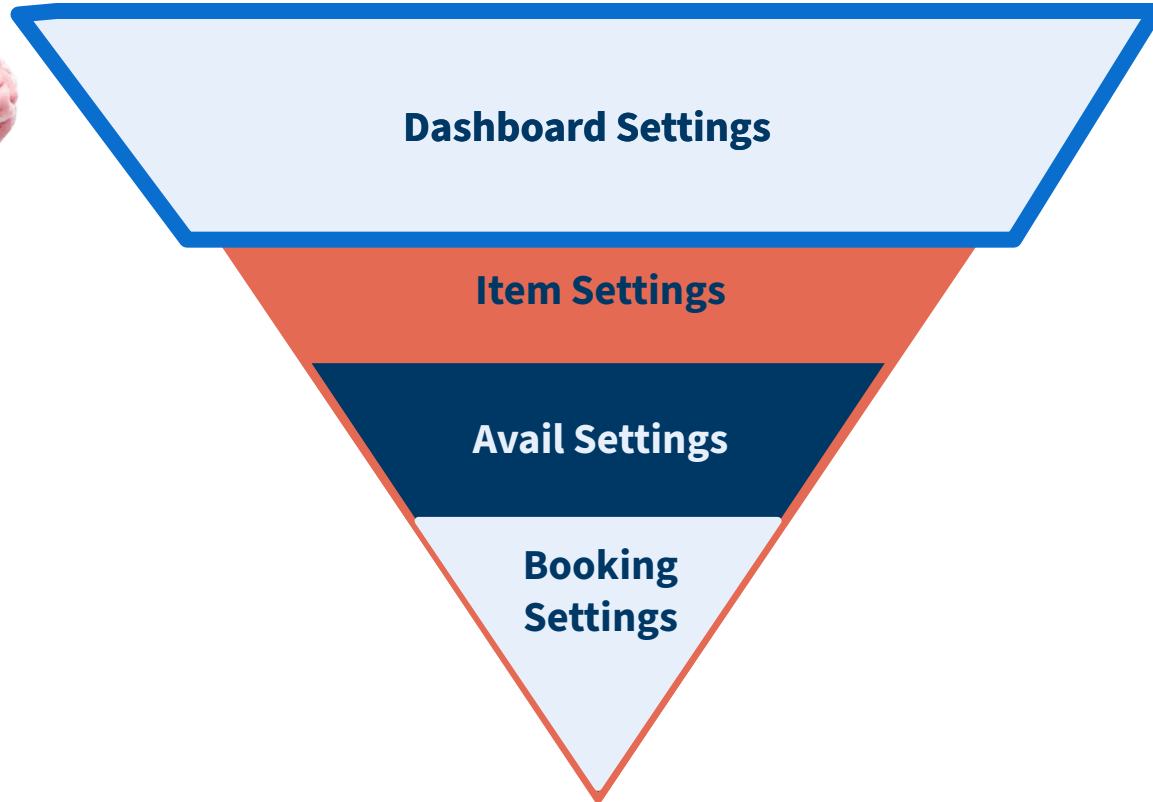


# Setting Up Resources





# Setup: The Resource Pyramid



# Creating a Resource in Your Dashboard

The screenshot shows a web browser window displaying a dashboard for 'Staci & Jake's Spark Demo'. The dashboard has a navigation bar with tabs for 'Bookings', 'Manifest', 'Reports', 'Items', and 'Settings'. The 'Items' tab is selected, and the 'Resources' sub-tab is active. Below the navigation bar, there is a '+ New item' button and a 'Table' view selector. The main content area displays a table with 3 items. The table has the following columns: ID, Name, Status, Show Seats Left At, Group Same-day Availabilities, Send Reminder Email, Send Follow-up Email, Send Reminder Text Message, Retail Item, and Ticket-scanning Enabled. The items listed are:

ID	Name	Status	Show Seats Left At	Group Same-day Availabilities	Send Reminder Email	Send Follow-up Email	Send Reminder Text Message	Retail Item	Ticket-scanning Enabled
66247	Catamaran Guided Cruise	On	3		✓				
66249	Catamaran Hourly Rental	On	3		✓				
66251	Catamaran Daily Rental	On	3		✓				

- Navigate to Items → Resources
- Create a descriptive, accurate name
- Set the max use quantity
- Set the resource restriction



# What are Resource Restrictions?

Your “Resource Restriction” will determine how your inventory can be used across items!

- **None:** Resource used across all items concurrently until max is met
  - *Typical for: Rentals*
- **Same Availability:** Resource is limited to use on a single availability
  - *Typical for: Guides*
- **Same Item:** Resource is limited to use on a single item
  - *Typical for: Advanced Uses/Uncommon*
- **Same Booking:** Resource is limited to use on a single booking
  - *Typical for: Private Parties*

## Settings

Basic setup for this resource

Added to 0 resource requirements ▾ | Added to 2545 future availabilities ⓘ

Name  
Catamaran 1 Seats

Max uses  
15

The maximum number of this resource that can be used at one time

▼ Advanced

Use Creation

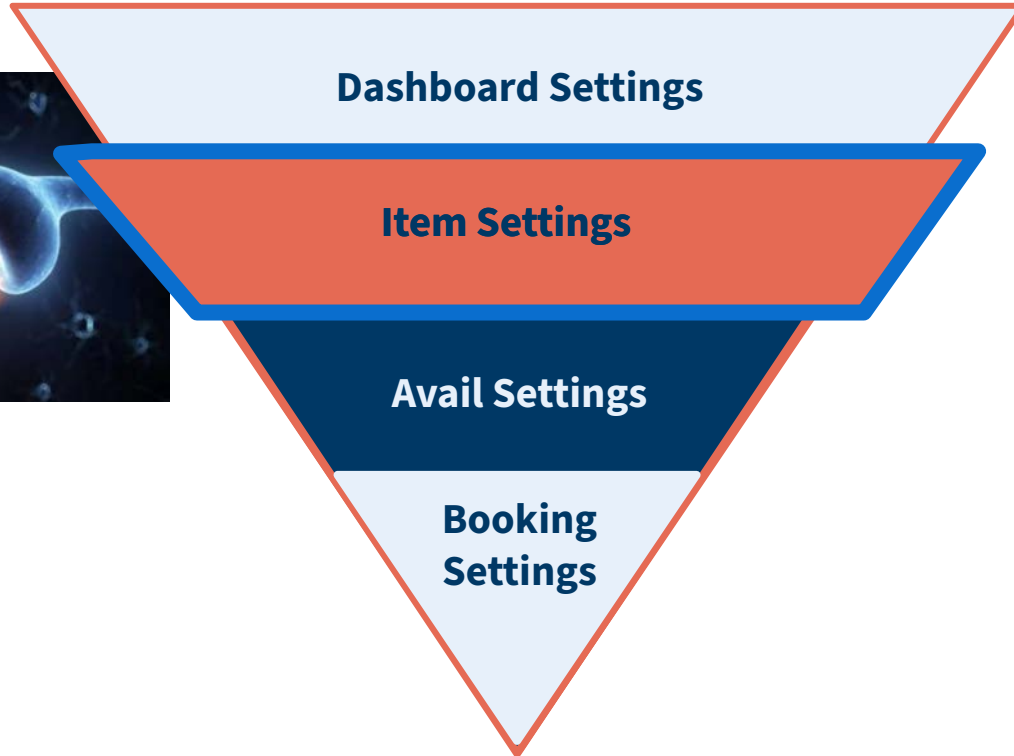
- None
- Same item
- ✓ Same availability
- Same booking

Hide from settings unless already in use [Learn more](#)

Save changes Delete



# Setup: The Resource Pyramid



# Attach Your Resources to Your Items

Once this portion is set up, we've told the brain how your customers will use each specific inventory item, or resource, that you have.

Catamaran Hourly Rental

## One Catamaran Available + Cleaning Buffer

### For: One Hour Rental

Do not allow split parties (1 option)

### Use 15 of Catamaran 1 Seats

From: Availability start

To: For 1.25 hours

+ Add requirement option

### For: Two Hour Rental

Do not allow split parties (1 option)

### Use 15 of Catamaran 1 Seats

From: Availability start

To: For 2.25 hours

+ Add requirement option

### For: Three Hour Rental

Do not allow split parties (1 option)

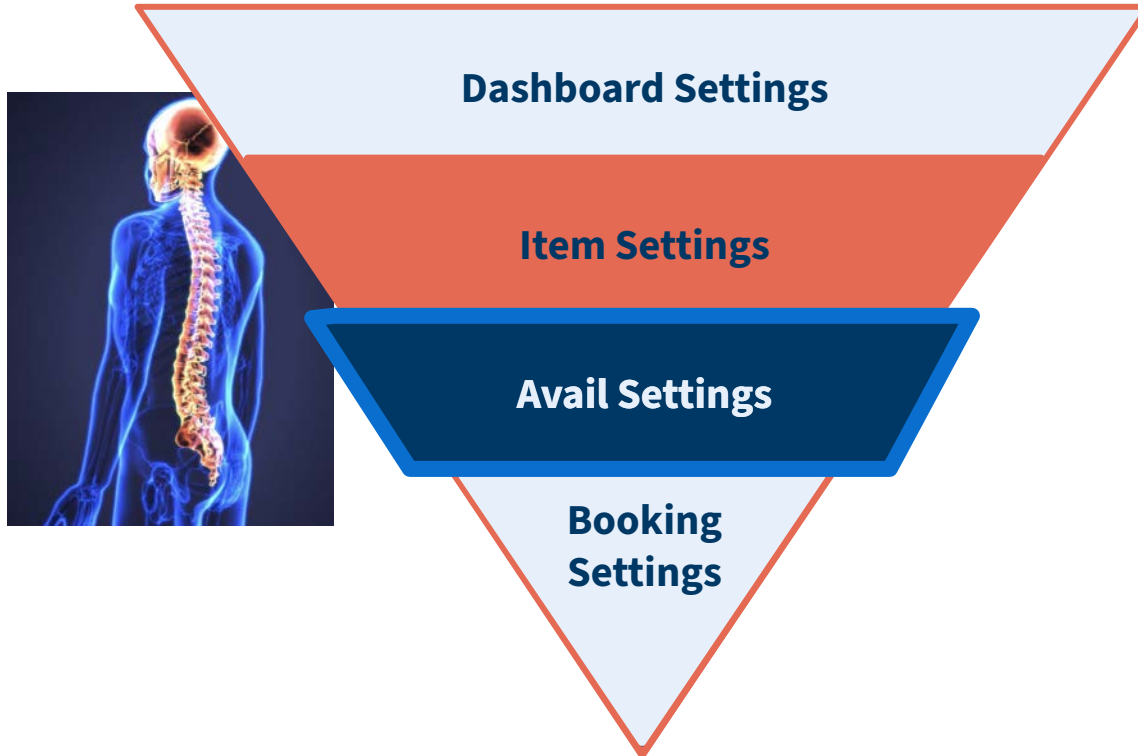
### Use 15 of Catamaran 1 Seats

From: Availability start

To: For 3.25 hours



# Setup: The Resource Pyramid



# Attaching Resources to Avails

Once resources are created in the item, they can be attached to specific availabilities

- Navigate to the desired item's calendar
- Click on “update availabilities”
  - To open the availability updates
- Select “resource requirements” in section 1
- Select your time range
- Select any availability filters
- Select the desired resource requirements in section 3, and complete updates

The screenshot displays a web application interface for managing availability. The browser address bar shows the URL 'demo.fareharbor.com'. The page title is 'Availability Calendar'. Below the title, there is a navigation bar with tabs for 'Bookings', 'Manifest', 'Reports', 'Items', and 'Settings'. A 'Create availability' button is prominently displayed. The main area is a calendar grid for September 2023, showing dates from August 27 to September 16. Each date cell contains a list of 'Catamaran Guided Cruise' items with time slots (7am and 1pm) and icons representing resources. A 'Today' button is visible in the top right corner of the calendar grid.



# Single Availability Updates

## Updating Availability Resources


*To update a single availability to a specific resource group*


**Catamaran Guided Cruise**  
Friday, September 1st 2023 @ 7am – 11am


[Bookable online](#) ▾  0 booked  30 available ▾  0 crew ▾

---

**0 booked**

Availability notes: 

Public headline: 

Private headline: 

**0 active bookings**

---

**Settings** ✕

▼ Capacity & Time

Total capacity

Starting at  Hours long

🕒 Ends 9/1/23 @ 11am

▼ Delete

**Delete this availability**

All bookings must be rebooked or cancelled before availabilities can be deleted. [Learn more](#)

▼ More Options

Custom field group

Default group  ✕ ➔

Customer information collected for every booking. [Learn more](#)

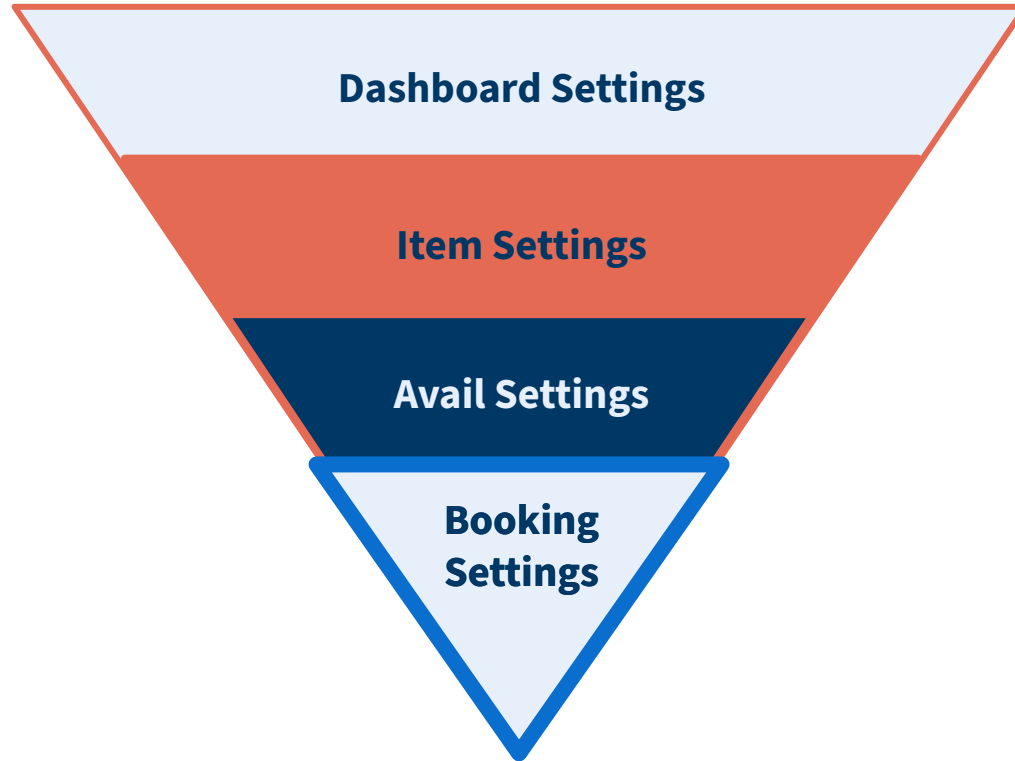
Requirements

- Two Catamarans ✕ ➔
- One Catamaran
- Two Catamarans**





# Setup: The Resource Pyramid



# Booking Level Resource Changes

## Updating Bookings Resources

*To update a specific booking to use a specific resource*

The screenshot displays a web browser window with the URL `demo.fareharbor.com/smkdemo/dashboard/items/66247/calendar/2023/09/?overlay=/contacts/389452/bookings/858348be-6a70-4e73-a6da-07f07e59b1...`. The page shows details for Booking #426091, a 'Catamaran Guided Cruise' on Thursday, September 14th, 2023, at 7am - 11am. The booking is for 1 person, with a payment of \$40.00 due. The 'Booking actions' panel on the right includes options like 'Add or remove customers', 'Rebook', 'Cancel booking', 'Set check-in for all customers', 'Add payment', 'Save or hold card', 'Send email or text', and 'Print'. A video player is visible at the bottom of the page.

Booking #426091 Demo  
Today @ 1:14pm by Staci McMullan (FareHarbor Demo)

Catamaran Guided Cruise  
Thursday, September 14th 2023 @ 7am - 11am

Due Payments: \$0.00  
**\$40.00** Booking total: \$40.00

Booking notes: ✎

1 Person not checked in (1 total)

Person	Amount
Not checked in	\$40.00
Catamaran 1 Seats: 1	

Whole-booking fields ⋮

+ Add expense or discount

Subtotal \$40.00  
Total \$40.00 ✎

Booking actions Advanced ▾

- Add or remove customers ▾
- Rebook ▾
- Cancel booking
- Set check-in for all customers
- Add payment \$40.00 Due
- Save or hold card
- Send email or text
- Print



# Managing Your Resources





## Which Describes Your Business?

- Static Inventory
- Increasing Inventory
- Regularly fluctuating inventory
- Combination of the above



# Inventory Changes

## LONG-TERM CHANGE Max Use Updates

The screenshot shows a web interface for managing resources. On the left, a sidebar lists 'All resources', 'Catamaran 1 Seats', 'Uses', and 'Settings' (which is highlighted). The main content area is titled 'Settings' and includes a sub-header 'Basic setup for this resource'. Below this, there are two status indicators: 'Added to these resource requirements' and 'Added to 2546 future availabilities'. The 'Name' field contains 'Catamaran 1 Seats'. The 'Max uses' field is a text input containing the number '16'. Below the input is a tooltip that reads 'The maximum number of this resource that can be used at one time' and a link to 'Advanced'. At the bottom, there are two buttons: a green 'Save changes' button and a red 'Delete' button.

- Offering More Seats
- Bought more Side by Sides
- Taking an extra guest (singular occasion)

## SHORT-TERM CHANGE Resource Overrides

The screenshot shows a 'Create override' form. The title is 'Create override starting on Friday, August 25th 2023'. The form has three main sections: 'Duration' with a dropdown set to 'All day', 'Repeating' with a dropdown set to 'Don't repeat', and 'Maximum uses' with a text input set to '14'. Below the 'Maximum uses' input is a tooltip that reads 'The maximum number of this resource that can be used at one time'. There is also a 'Notes' section with a text area and a 'Preview Markdown' link. At the bottom, there are two buttons: a green 'Create override' button and a grey 'Cancel' button. A link 'How to use resource overrides' is also present.


- Repairs
- Taking an extra guest (One-off)
- Staff PTO Impacting Capacity





# Setting Up Multiple Resource Groups for Fluctuating Inventories

Set up as many resource groups as needed to accommodate your business needs.




**One Catamaran Available** 


**For: One Hour Rental**   
Do not allow split parties (1 option)

**Use 1 of Catamaran 1 Seats**   
From: Availability start  
To: For 1 hours


[+ Add requirement option](#)


[+ Add requirement](#)

**Two Catamaran Available** 

**For: One Hour Rental**   
Do not allow split parties (2 options)

Only the first available requirement option will be used:

**Use 1 of Catamaran 1 Seats**   
:: From: Availability start  
To: For 1 hours

**Use 1 of Catamaran 2 Seats**   
:: From: Availability start  
To: For 1 hours

[+ Add requirement option](#)

# Assign Resource Groups to Availabilities As Needed

Once resource groups are set up, quickly switch between them using the availability updater!

### 1 Change:

COMMON

Online booking status

Capacity

Headline

Start time

Length

Notes

SETUP

Customer types

Whole-booking custom fields

**Resource requirements**

### 2 For these availabilities:

From  To

Suggested filters:

- ▶ Resource requirements

Filter by: [Reset all](#)

▼ Day of the week ✓

Su  M  T  W  Th  F  S

[Reset](#)

### 3 To:

Resource requirements

No resource requirements ▼

One Catamaran Available

**Two Catamaran Available**



# Applying Your Updates

1

## Problem

Resources have changed

2

## Action

Switch Resources

3

## Finalize Update - CRUCIAL

Reapply Resources

### Booking actions

Advanced ▾

 Add or remove custo

 Rebook

 Cancel booking

Custom refund


Issue gift card

Reprice booking

Reapply resources

### Availability actions

Advanced ▾

 Book (14 available)

 Manifest

Prices

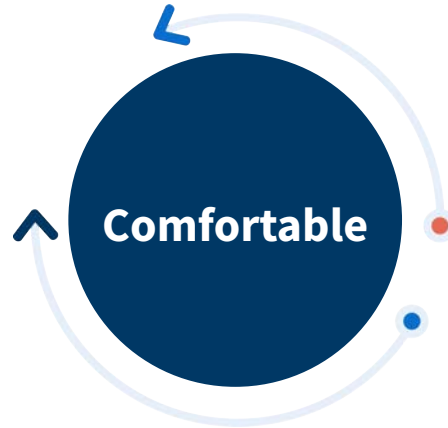
Book button

Reapply resources





# How comfortable are you managing your resources?



# Tracking Your Resources

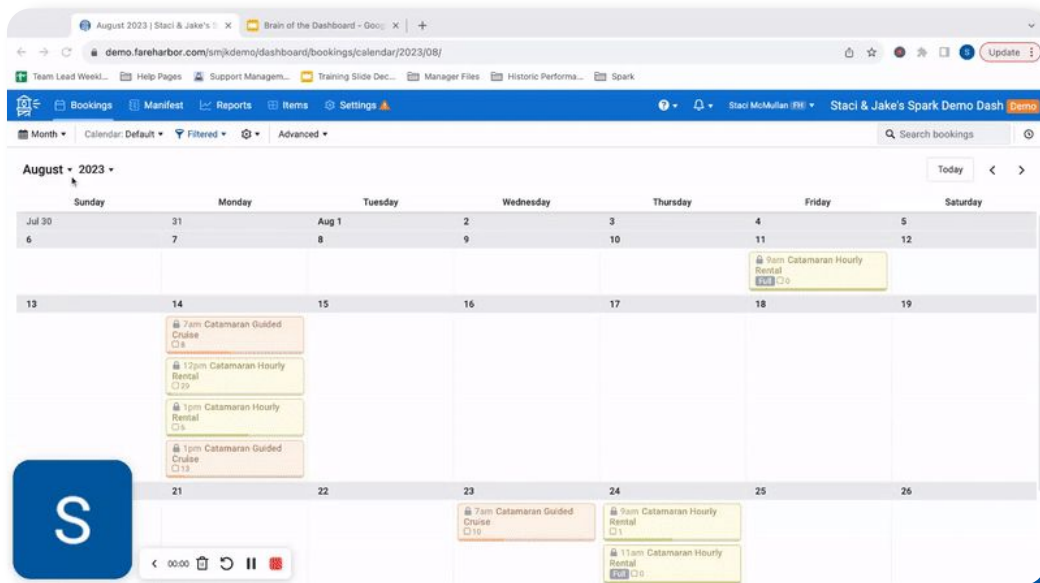


# Tracking Inventory with Custom Calendars

Utilize the timeline view for a visual display of your inventory

1. Select timeline view from bookings tab
2. Under setup, select “resources”
3. Apply desired filters

Optional: Click on specific uses to see more data



# Tracking Inventory with Custom Manifests

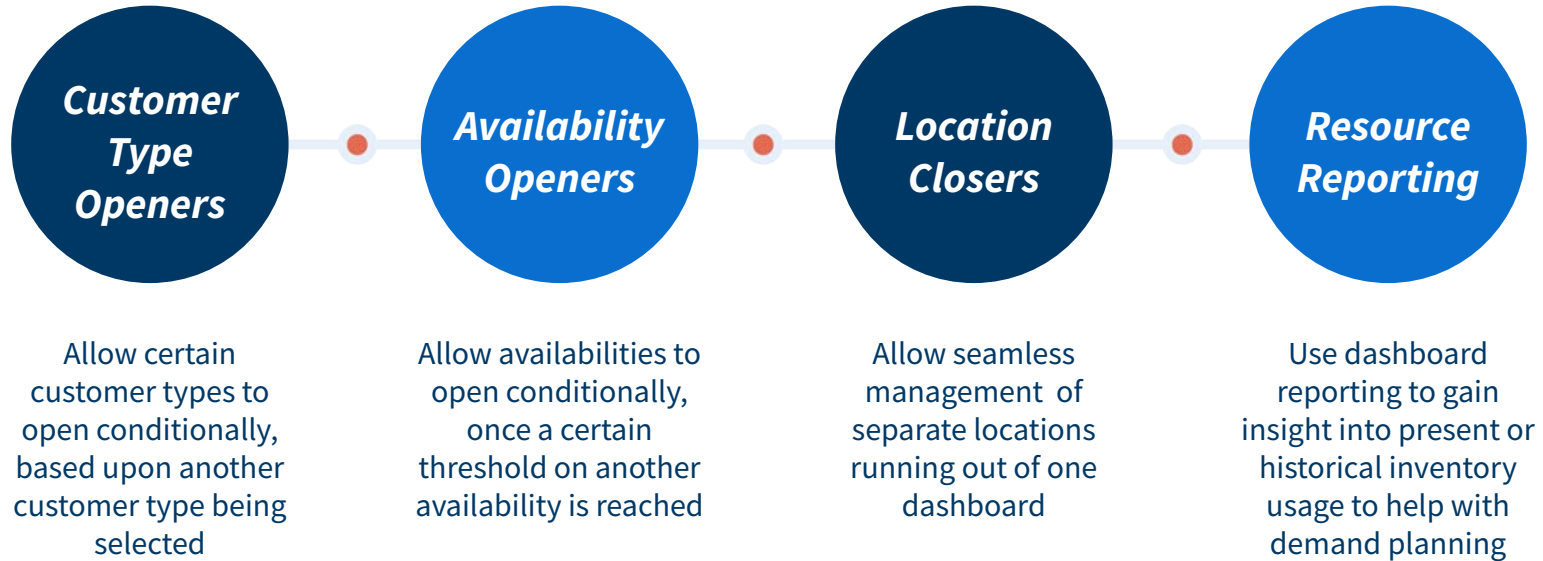
Utilize custom views and resources to see when your inventory is returning

Advanced set up - contact us for help!

	Start	Item	ID	Contact	1 total
▶	9am	<span style="color: blue;">●</span> Catamaran Daily Rental	#421175	Frodo	1 One Week Rental



# But wait, there's more!



# Recognizing When Your Brain Needs a Check-up!

29 +

9am Catamaran Hourly Rental  
■ 0 □ 2

**10am Catamaran Hourly Rental**  
■ 2 □ 1  
Overusing resources

“Overusing Resources”  
Alert

▼ 2 Two Hour Rentals not checked in (2 total)

Two Hour Rental ⋮ ▼ \$350.00  
Not checked in ▼ \$350.00  
Catamaran 2 Seats: 15 ✎

▼ 1 Three Hour Rental not checked in (1 total)

Three Hour Rental ⋮ ▼ \$475.00  
Not checked in ▼ \$475.00

Bookings not showing  
inventory usage

Booking ID: #423515

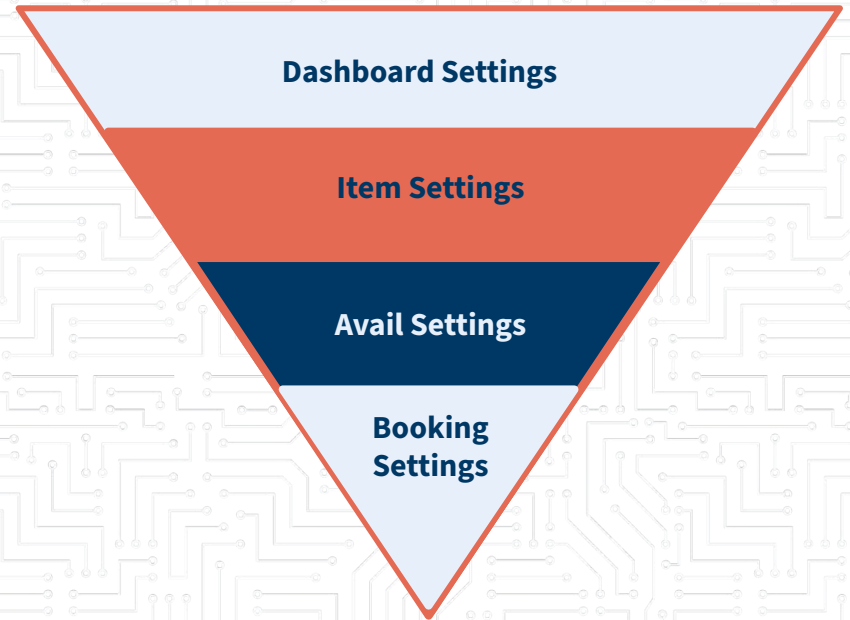
Used at	Uses	Customer type	Item
Tuesday, August 29th 2023 @ 10am - Wednesday, August 30th 2023 @ 10am	15	Two Hour Rental	Cata Hour
Tuesday, August 29th 2023 @ 10am - Wednesday, August 30th 2023 @ 10am	15	Two Hour Rental	Cata Hour

Inventory not used at  
correct time



## Recap

- What and Why Resources?
- Creating and Configuring Resources - Pyramid
- Tracking
- Advanced Uses





# When to Contact Us for Help

**We've covered a lot of ground... we're still here to help!**

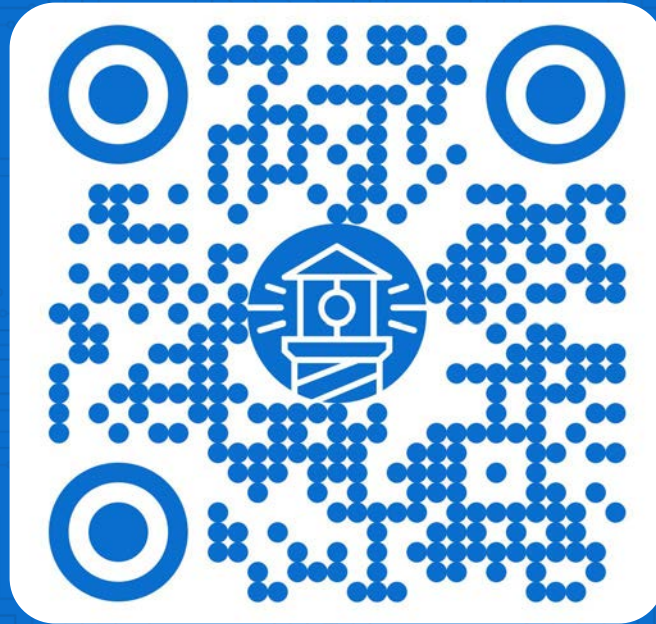
- Questions on anything presented here today
- Assistance/consultation in initial resource set up
- Troubleshooting existing resource set ups
- Optimizing or updating existing resource setups
- Questions regarding advanced setups





## Want to Learn More?

Scan the QR code here and bookmark our consolidated learning resources list!



Help Docs



Thank You 





**Have you checked out Compass recently?**

**Login to Compass** for guides on PPC, Google, SEO, content writing, industry insights and more!

**Here are a few other Spark sessions on Compass:**

- [Make GA4 Work For You: Exploring Functionality & Reporting](#)
- [Mastering Marketing: Crafting an Effective Marketing Plan for Success](#)

## 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!

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 

