

Empower Yourself: Mastering Dashboard Essentials

FAREHARBOR
webinars



Matthew Selders

Technical Support Specialist II

Denver, Colorado



Trint Shupe-Larson

Technical Support Specialist

Denver, Colorado



Today's Agenda

Maximize your profitability with these quick dashboard updates

1. **New Items**
2. **Customer Types**
3. **Custom Fields**
4. **Availabilities**
5. **Booking Flows**
6. **Combos**



Poll

Which of the following options seems like the most difficult or time consuming changes to make on your own?

- **New Items**
- **Customer Types**
- **Custom Fields**
- **Availabilities**
- **Booking Flows**
- **Combos**



New Items



Steps to creating a new item



New items are built out by request or in the Items section



Each task can be toggled to direct you straight to that location in the dashboard



New items can either be left private or made public for online customers



Item Setup Checklist



Item Setup Checklist

Use this list to perfect your item for bookings and easily navigate to common settings.

Complete Using defaults Incomplete

Set confirmation notes ›
Using confirmation notes (all items)

Set cancellation notes ›
Using default cancellation notes

Add an item description ›

Upload photos ›

Add customer types ›

Create availabilities ›

Make bookable ›
Private

Add to booking flows

Add to custom calendars ›
Custom Calendar

**FareHarbor Support is always ready to
help @ (855) 495-5551**



New Item Demo

Start date

Today	<	>				
Wed 9/18	Thu 9/19	Fri 9/20	Sat 9/21	Sun 9/22	Mon 9/23	Tue 9/24

No availabilities



How to Duplicate & Submit a New Item Request

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

Jeff Goldblum

Matthew Selders Urban Adventures

[Grid](#) [Setup](#)[Calendar: Crew Assignments](#)[Filter](#)[Advanced](#)

Start date

Today



Wed 9/18

Thu 9/19

Fri 9/20

Sat 9/21

Sun 9/22

Mon 9/23

Tue 9/24

No availabilities

Customer Types



Poll

Customer types must always be a person?

→ True

→ False



Customer types



Person, charter, seats
even merchandise



Price (including
previews), capacity,
categorizing your
items



They Appropriately
allocate resources,
display price
previews, essential to
making reservations





Customer Type Demo

Filter list

Overview

Users & Permissions

Bank & Payments

Recent Activity

Communication

Info & Policies

Canned Messages

Public Headlines

Locations

Online Booking

Book Buttons & Embeds

Analytics & Tracking

Booking Flows

Combos

Booking Restrictions

Build

Customer Types

Custom Fields

Price Sheets

Check-in

Gift Cards

Campaigns

Memberships

Waivers

Seat Maps

Integrations

To process payments, complete the [payment setup checklist](#)



Trint Shupe-Larson's Treetop Park

Time zone: US/Eastern

FareHarbor v10.4.76

descript

Step-by-step
process

How to create a customer type

1. Create the customer type(s)

Settings > Customer Types >

+ New customer type

2. Add the customer type to your item(s)

Items > [Edit](#) > Options & Prices

+ Add customer type



Examples



Sintra Tour
From **€90.10** 8 hours • All ages • Full Day Trip • UNESCO World Heritage • Pick-up and Drop-off • Private Tour [Book](#)

Call to book	One Person Please call +351 934098882 to book	€225 Excluding fees
0 ▾	Two People	€125 Excluding fees
0 ▾	Three People	€115 Excluding fees
0 ▾	Four People	€100 Excluding fees
0 ▾	Five People	€95 Excluding fees
0 ▾	Six People	€85 Excluding fees
0 ▾	Seven People	€85 Excluding fees
0 ▾	Eight People	€85 Excluding fees
0 ▾	Nine People	€85 Excluding fees

0 ▾	4 hour adult rentals	\$50
0 ▾	4 hour child rentals	\$50
0 ▾	8 hour adult rentals	\$80
0 ▾	8 hour child rentals	\$80



Custom Fields



Poll

Custom Fields are a place to ask your customer additional questions during the booking process?

- True
- False



Custom Fields

What are
custom fields?

Custom fields are additional options you can provide to your customer during the booking process

What are they
used for?

These fields can be used to gather information, offer extra options, or record information just for your staff

Why should
you use
custom
fields?

Custom fields let you optimize your book form. They can help you collect information or create add-ons for your customers to purchase





Custom Field Demo

[Overview](#)[Users & Permissions](#)[Bank & Payments](#)[Recent Activity](#)[Communication](#)[Info & Policies](#)[Canned Messages](#)[Public Headlines](#)[Locations](#)[Online Booking](#)[Book Buttons & Embeds](#)[Analytics & Tracking](#)[Build](#)[Customer Types](#)[Custom Fields](#)[Price Sheets](#)[Check-in](#)

Matthew Selders Urban Adventures

Joined FareHarbor in January 2022

Time zone: US/Mountain

FareHarbor v10.4.76

[Changelog](#)

Tuesday, June 18, 2024

FareHarbor Dock

Streamline walk-up sales, enhance customer experience, and scale operations with the speed and convenience of our booking POS solution. Enable customers to book independently in Kiosk mode or your employees to sell faster in Staff mode.

[Learn more](#)

Tuesday, May 14, 2024

FareHarbor Waivers

Transform your waiver management process with our brand new in-house solution. Built to safeguard your business, engage customers, and gather essential information.

[Learn more](#)

Wednesday, May 8, 2024

Combos

Leverage combos to upsell more tours and activities, offer special discounts, and increase the number of bookings per customer in one checkout flow.

[Learn more](#)



Adding the Custom Field to Your Item



Bookings

Manifest

Reports

Items

Settings



Jeff Goldblum

Matthew Selders Urban Adventures

Items

Resources



Custom Field Examples

+8% Set Sail with Trip Protection!

Change Course With Ease Plans change? No sweat! With Trip Protection, the cancellation policy does not apply to you! You can cancel within 24 hours up until the time of the tour where you will get a full refund minus the cost of Trip Protection and processing fees. It's your safety net for smooth sailing!

Do you need transportation to and from the resort?

Please select where you are staying ▼ *

Comments

Do you have any special requests or comments?

How did you hear about us?

Choose an option ▼

By checking this box, I affirm that all members of my party have read and agree to the booking cancellation policy listed below. *

No refunds will be issued for no-show's to the activity under any circumstances. Notice of cancellation must be provided at least 24 hours in advance of the activity in order for any refund eligibility.

What is your name?

Are you 21 years or older? *

How did you hear about us?

Choose an option ▼

Additional Information

Gift card

0 ▼ Add gratuity for your guide (\$1)

Comments

Any additional notes or requests?

Availabilities



Creating availabilities

**What are
availabilities?**

Calendar blocks for
creating bookings

**How are
availabilities
created?**

Availabilities are built
out inside each item,
either in the
dashboard or by
request.

**Why knowing
how to create
availabilities is
critical**

Quickest possible
calendar updates
ensure customers
book easily and ASAP



Creating Availabilities

When

Start date
📅 09/25/2024

Repeating
Don't repeat ▾

+ Add date range

Duration
Time range ▾

Start time **Hours long**

🕒 * 🕒 *

+ Add start time

Customers

Total capacity

Leave blank to use resource capacity

Customer Types
Choose which customer types should be added to this availability:

Select: [all](#), [none](#) Show customer type IDs

	Per-booking minimum:	Per-booking maximum:	Per-availability capacity:
<input checked="" type="checkbox"/> Person	<input type="text" value="None"/>	<input type="text" value="None"/>	<input type="text" value="None"/>

Advanced

Public headline

Private headline

Optional, only shown to people in your company

Online booking status

Auto close ▾

Bookable online until full or cutoff is reached

Unlisted

Custom fields group

Default group ✕ ▾

For whole booking

Create Cancel [Get help creating availabilities](#)





Creating Availabilities Demo

Items Resources

+ New Item Grid

Find

SeaBreachers [Edit](#) Private

Street Art Walking Tour [Edit](#) \$99 - \$100

Private Tours [Edit](#)

Electric Bike Adventure Tour [Edit](#) Private

Private Party Boat Rental [Edit](#)

Brewery Tour [Edit](#) Private

Snorkel Tour [Edit](#) Private

Scuba Tour [Edit](#) Private

Office Private

Grand Canyon Helicopter

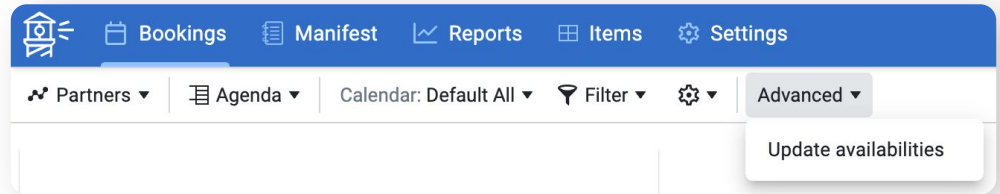
Sierra Nevada Mountain Range Helicopter

Video player controls: play, pause, stop, 0:00, full screen, refresh, delete

Availabilities

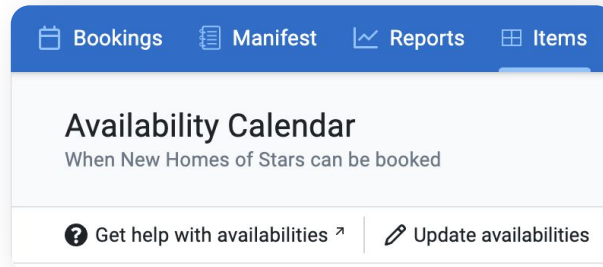
Updating multiple items

Bookings > Advanced > Update availabilities



Updating one item at a time

Items > [Edit](#) > Calendar > Update availabilities



Availabilities

Updating Availabilities

Multiple items

1 Change:

COMMON

Online booking status

Capacity

Headline

Start time

Length

Notes

SETUP

Automated Messages

ADD & REMOVE

Crew members

Availabilities

One Specific Item

1 Change:

COMMON

Online booking status

Capacity

Headline

Start time

Length

Notes

SETUP

Customer types

Whole-booking custom fields

Resource requirements

Automated Messages

ADD & REMOVE

Crew members

Availabilities



Booking Flows



Organizing the Booking flow

What are
Booking
flows?

Booking flows are a system that allow you to organize your items into categories or groups

How do you
access them?

Once enabled in the permissions, This can be accessed via the settings section of the dashboard

Why should
you utilize
this feature?

By adding your items to your booking flow customers will be able to be start making bookings sooner





Adding Items to Your Booking Flow

Filter list

- Overview
- Users & Permissions
- Bank & Payments
- Recent Activity

- Communication
- Info & Policies
- Canned Messages
- Public Headlines
- Locations

- Online Booking
- Book Buttons & Embeds
- Analytics & Tracking
- Booking Flows
- Combos
- Booking Restrictions

- Build
- Customer Types
- Custom Fields
- Price Sheets
- Check-in
- Gift Cards
- Campaigns
- Memberships
- Waivers
- Seat Maps

To process payments, complete the [payment setup checklist](#)



Trint Shupe-Larson's Treetop Park

Time zone: US/Eastern

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Organizing Your Booking Flow

Combos



Combos

**What are
Combos**

Combos are a feature that allow customers to get a discount when booking online for multiple activities

**How can they
be set-up?**

Combos are created from the settings section of the dashboard. Once they're enabled

**Why should
you use the
feature?**

Combos allow you to offer items that pair well with the selection in their cart





How to Create a Combo Demo

Filter list

Overview

Users & Permissions

Bank & Payments

Recent Activity

Communication

Info & Policies

Canned Messages

Public Headlines

Locations

Online Booking

Book Buttons & Embeds

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descript

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:

- [Managing your calendar & Availabilities](#)
- [Price with Confidence](#)
- [The Power of Custom Fields](#)



FareHarbor Help Pages:

- [Creating an Item](#)
- [Customer Types](#)
- [Custom Fields](#)
- [Availabilities](#)
- [Booking Flows](#)
- [Combos](#)
- [Request forms](#)

Please contact **Support** if you have any questions pertaining to your dashboard!

Email: support@fareharbor.com

Phone: (855)495-5551



Q&A



Thank you!

