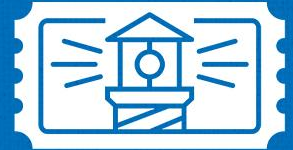


How to Book: Affiliate Dashboard

Billing Setup



FAREHARBOR

Powerful booking software.

Unmatched support.



Calendar Key

Grid View: The calendar will default to “grid” view, which shows the upcoming week, but you can switch to month, agenda or timeline.

Searching Dates: You can change the month or year from the drop downs on the left, or switch from one day to the next using the arrows on the right.

The Colors: They are set by the activity provider and are a way for them to distinguish their different activities.

Phone Icon: Means you must call the charter to book.

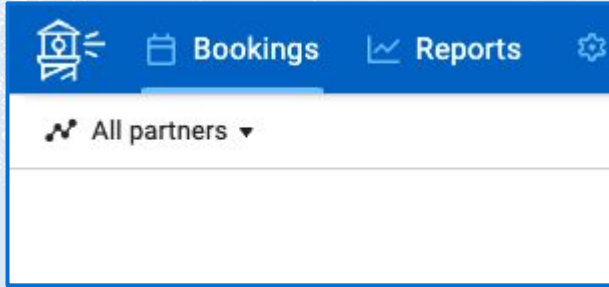
Square or Person: Tells you how many spots are available.

The screenshot shows a web-based calendar interface for 'cowabungatours'. The top navigation bar includes 'Bookings', 'Reports', 'Settings', and 'Help'. The user is logged in as 'Admin' and the role is 'ABC Concierge'. The calendar is set to 'Grid' view and shows a week starting from Thursday, 4/14. The activities are color-coded: Guided Hike (orange), Bike Rentals (green), ATV Rentals (blue), and Gift Card (light green). Each booking entry includes a time slot and a square icon representing the number of spots available. Some entries also feature a phone icon, indicating that a call is required to book.

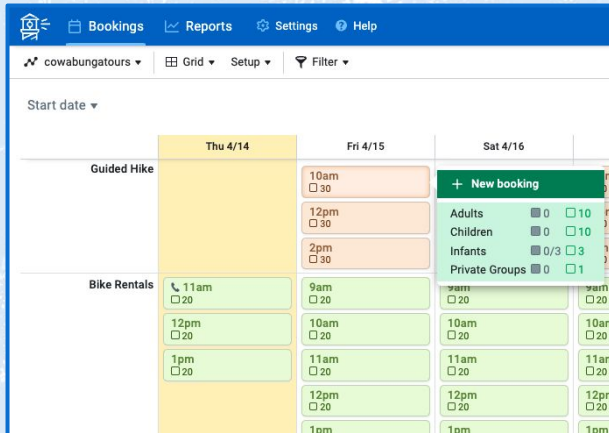
	Thu 4/14	Fri 4/15	Sat 4/16	Sun 4/17	Mon 4/18	Tue 4/19	Wed 4/20
Guided Hike		10am □ 30 12pm □ 30 2pm □ 30	10am □ 30 12pm □ 30	10am □ 30 12pm □ 30 2pm □ 30			
Bike Rentals	11am □ 20 12pm □ 20 1pm □ 20	9am □ 20 10am □ 20 11am □ 20	9am □ 20 10am □ 20 11am □ 20	9am □ 20 10am □ 20 11am □ 20	9am □ 20 10am □ 20 11am □ 20	9am □ 20 10am □ 20 11am □ 20	9am □ 20 10am □ 20 11am □ 20
ATV Rentals	2pm □ 6	9am □ 6 2pm □ 6			9am □ 6 2pm □ 6	9am □ 6 2pm □ 6	9am □ 6 2pm □ 6
Gift Card							



Making a Booking



01. Click **all partners** and select the activity provider from the dropdown that you would like to book for.



02. Click on the availability that you would like to make a booking for, then select **+ New booking**.

***Reminder:** The shaded square icon is the number of spots booked, and the empty square icon is the number of spots available.



Making a Booking

←

Guided Hike
Friday, April 15th 2022
@ 10am - 11am

Voucher

AGENT

No agent selected

No desk selected

Full name *

Phone number

Email address

[Add booking note](#)

0	Adults (\$20) Ages 16+ 0 on previous bookings
0	Children (\$10) Ages 3-15 0 on previous bookings
0	Infants Under 3 years 3 of 3 left
0	Private Groups (\$500) 1-10 people 0 on previous bookings

- 03. **Voucher (if necessary):** If you give the customer a reference number that they need to have with them when they arrive.
- 04. **Agent (if necessary):** Select your name under “No agent selected” or select “add new agent” to track who is making the booking.
- 05. **Desk (if necessary):** Can be used when you have various locations under your company name and you need to keep track of bookings made from each location.
- 06. **Contact:** Enter the guest’s full name, cell phone number, and email address.
- 07. **Add Booking Note (if necessary):** You are able to add notes about the guest for the activity provider. For example, “it is the guest’s birthday” or “they need special assistance”.
- 08. **Customers:** Select the number of guests/people that are needed for the booking.



Making a Booking

- 09. Additional fields:** Fill out any additional fields such as meal options, add-ons, and terms and conditions. Fields marked with a red asterisk are required.
- 10. Collect Payment:** Collect full payment from the customer outside of FareHarbor. The Invoice price shown is the **net rate that you will owe** back to the tour operator after you keep your commission.
- 11. Complete Booking:** This will turn green once all required fields have been answered.

The screenshot shows a booking form with the following sections:

- Adult:** A dropdown menu with a red asterisk and a close button. The selected option is "Hiking Pole Rental" with a price of "\$?". Below it, the text "One size fits all" is displayed.
- Child:** A dropdown menu with a red asterisk and a close button. The selected option is "Hiking Pole Rental" with a price of "\$?". Below it, the text "One size fits all" is displayed.
- Gratuity (optional):** A dropdown menu with the text "Choose an option". Below it, a note says "If you don't carry cash and would like to add a gratuity you may do so here." and a text input field with the prompt "If you have a promo code, please enter it here:".
- How did you hear about us?:** A dropdown menu with the text "Choose an option".
- Terms and Conditions:** A checkbox with the text "I accept the terms and conditions" and a red asterisk.
- Invoice price:** \$27.00
- Payment Options:** Radio buttons for "Save card to charge later" and "Pay in full" (selected).
- COLLECTED BY:** Radio buttons for "Collected by you" (selected) and "Collected by you" (unselected).
- Resources (2):** A dropdown menu.
- Complete booking:** A large grey button.
- Disclaimer:** "Please answer all fields marked with * to complete your booking"
- Agreement:** "Customer agrees to FareHarbor's terms of service"



Reporting on Affiliate Bookings



The screenshot shows a software interface with a blue header bar containing navigation icons and labels: Home, Bookings, Reports, Settings, and Help. Below the header, there is a left-hand navigation menu and a main content area. The left menu includes: 'Need help? Learn about working with reports and important terms.' (with a question mark icon), 'Overview' (with a home icon), 'Payouts & Refunds' (with a bank icon), 'Bank Debits' (with a bank icon), 'Invoices' (with a document icon), 'Advanced' (with a right arrow icon), 'Sales' (with a right arrow icon), 'Bookings' (with a right arrow icon and highlighted), 'Customers' (with a right arrow icon), 'Resource Uses' (with a right arrow icon), and 'Expenses and Discounts' (with a right arrow icon). The main content area features a green '+ New Bookings report' button at the top. Below it, under 'Suggested Reports', are: 'Bookings by Item' (Booking summary grouped by item), 'Bookings by User' (Booking summary grouped by most recent booking user, then by item), 'Booking Source' (Online vs affiliate vs direct), 'Booking Details' (Bookings with detailed data), 'Underpaid' (Bookings requiring payment), and 'Cancelled' (Cancelled bookings grouped by item).

Reporting on Bookings

01. Go to “Reports” at the top of the page.
02. Click “Bookings” to the left, then “Booking Source”
03. Click the Down arrow next to “Advanced”: Adjust any parameters and filters for the report (next page)
04. Click the green “Generate” button to run the report.

The screenshot shows the 'Booking Source' report configuration screen. At the top, it says 'Booking Source' with a sub-label 'Bookings Online vs affiliate vs direct'. Below this, there is a section with a 'Advanced' button (with a dropdown arrow) and a 'Custom Range' dropdown menu.

Advanced Settings on Reports



Booking Source

Bookings | Online vs affiliate vs direct Generate

Hide

Dates:

Custom Range

03/01/2022 -

03/31/2022

Report on:

Availability date

All Partners

Filter bookings:

Cancelled Status
uncancelled, cancelled > \$0 paid

+ Add Filter

All partners

+ Add Filter

Group by:

Find group

Source

Company

Affiliate

Availability

Agent

Desk

Item

Lodging

Columns:

Summary report

Detailed report

Summary Detail All

Find column

Booking columns

Select: all, none, default

of Bookings

Cancelled

Subscribed to text messages

First Section (Parameters): Under “Dates”, you can select “Custom Range” at the top of the dropdown to select your own dates, or you can choose an auto-populated date range to report on.

Select if you want to report on “Availability Date” (the date of the tour) or “Booking Date” (date the booking was created).

Unselect “All Partners” to select whomever you want to report on, or leave as is to report on all partners.

Second Section (Filters): Use filters to hone in on specific bookings, such as by the agent or user that created them.

Third Section (Group by): Unselect “Affiliate” and select “Company”

Fourth Section (Columns): Add any additional information you want shown, such as “Paid to Affiliate” or “Received from Affiliate”