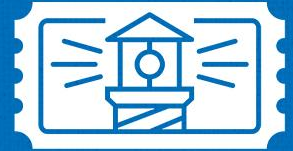


# How to Book: Affiliate Dashboard

Referral 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.

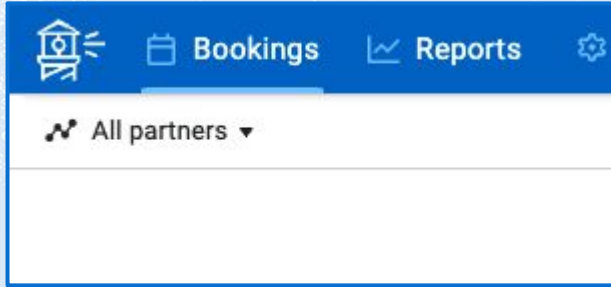
**Square or Person:** Tells you how many spots are available.

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 'ABC Concierge'. The interface is set to 'Grid' view. The calendar displays a week starting from Thursday, 4/14, to Wednesday, 4/20. The activities are color-coded: Guided Hike (orange), Bike Rentals (green), ATV Rentals (blue), and Gift Card (light green). Each activity is represented by a square icon with a time slot and a person icon indicating the number of spots available. The 'Start date' dropdown is set to 'Today'. The calendar shows the following bookings:

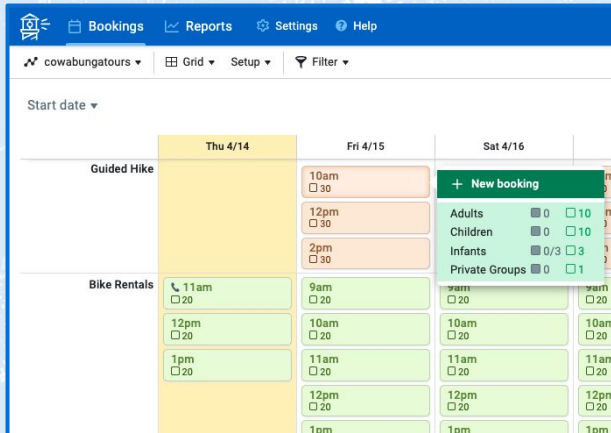
	Thu 4/14	Fri 4/15	Sat 4/16	Sun 4/17	Mon 4/18	Tue 4/19	Wed 4/20
Guided Hike		10am □ 30 12pm □ 30 2pm □ 30	10am □ 30 12pm □ 30	10am □ 30 12pm □ 30 2pm □ 30			
Bike Rentals	11am □ 20 12pm □ 20 1pm □ 20	9am □ 20 10am □ 20 11am □ 20	9am □ 20 10am □ 20 11am □ 20	9am □ 20 10am □ 20 11am □ 20	9am □ 20 10am □ 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	<b>Adults (\$20)</b> Ages 16+ 0 on previous bookings
0	<b>Children (\$10)</b> Ages 3-15 0 on previous bookings
0	<b>Infants</b> Under 3 years 3 of 3 left
0	<b>Private Groups (\$500)</b> 1-10 people 0 on previous bookings

- Voucher (if necessary):** If you give the customer a reference number that they need to have with them when they arrive.
- Agent (if necessary):** Select your name under “No agent selected” or select “add new agent” to track who is making the booking.
- 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.
- Contact:** Enter the guest’s full name, cell phone number, and email address.
- 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”.
- 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:** The Total price is the **retail rate** that the customer will pay and the Invoice price is the **commission amount that is due to you** from the tour operator. Leave the payment settings on “Pay in full” and “Collected by [tour operator]”, then charge the customer’s card on the booking.

**11. Complete Booking:** This will turn green once all required fields have been answered.

The screenshot shows a booking form with the following sections:

- Guests:** Two guests are listed: an Adult for \$20 and a Child for \$10. Each has a checkbox for "\$10 Hiking Pole Rental" and the note "One size fits all".
- Gratuity (optional):** A dropdown menu to "Choose an option". Below it is a note: "If you don't carry cash and would like to add a gratuity you may do so here. If you have a promo code, please enter it here:" followed by an input field.
- How did you hear about us?:** A dropdown menu to "Choose an option".
- Terms and Conditions:** A checkbox labeled "I accept the terms and conditions" with a red asterisk.
- Summary:** Subtotal \$30.00, Total \$30.00, Invoice price \$3.00.
- Payment Options:** Radio buttons for "Save card to charge later", "Pay in full" (selected), and "Charge card".
- COLLECTED BY:** Radio buttons for "Collected by Cowabunga Tours" (selected) and "Collected by you".
- PAYMENT TYPE:** Radio buttons for "Pay \$30.00 with:" and "Charge card" (selected).
- Card Information:** Fields for Card number (with a "Swipe card" link), Expiration (Month and Year), Name on card (with a "CVC" link), Country/Region (USA), and Billing zip code. All these fields have a red asterisk indicating they are required.
- Resources (2):** A dropdown menu.
- Complete booking:** A large grey button.
- Footer:** "Please answer all fields marked with \* to complete your booking".



# Reporting on Affiliate Bookings



# Reporting on Bookings

The screenshot shows the top navigation bar with icons for Home, Bookings, Reports, Settings, and Help. Below the navigation bar is a sidebar with a help link and a list of menu items: Overview, Payouts & Refunds, Bank Debits, Invoices, and an 'Advanced' section with sub-items: Sales, Bookings, Customers, Resource Uses, and Expenses and Discounts. The 'Bookings' item is highlighted with a right-pointing arrow. To the right of the sidebar is a main content area with a green '+ New Bookings report' button and a list of suggested reports: Bookings by Item, Bookings by User, Booking Source, Booking Details, Underpaid, and Cancelled.

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 close-up shows the 'Booking Source' report configuration. It features a dropdown menu with 'Bookings' selected and 'Online vs affiliate vs direct' as the report title. Below this is an 'Advanced' filter section with 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”