HOW TO – BOOKINGS

BOSSII ADMIN BOOKING TASKS

Enter the details of a Booking into BOSSII Admin

1. Click Bookings
2. Click View Bookings
3. Double Click the date of the Booking
4. Click New
5. Choose the Type of Booking to be inserted

Nb: The type of booking defines the fields that appear within the booking. For Example a normal booking can have much less fields to fill out rather than a major function which would require much more in depth information to be defined

Booking Details Tab:

6. The initial tab labelled Booking Details requires the user to enter all relevant details known including required fields:
    a. Contact Phone Number
    b. First Name
    c. Last Name
    d. Start Time
    e. PAX (amount of persons attending Booking)

7. Address the Status if the Booking is known to be different to the default Status

An Enquiry/Tentative status is a customer enquiry that has not had a confirmation allocated to it.
The customer may not have agreed to terms or paid a deposit or confirmed that they wish to continue with the booking enquiry
Confirmed bookings are bookings that have been confirmed, and if required, a deposit has been paid. These bookings are waiting for activation on the date as required.
Started bookings are bookings that are currently live on the system and have been started within the POS but have not yet been finalized.
Completed bookings are bookings that have occurred already
8. The confirm by date and the follow up date will automatically be entered dependent on the booking date
9. If required, Choose which Area the booking will be located in or the client has requested to be located in
10. If required, Choose which Section the booking will be located in or the client has requested to be located in
11. If choices have been made above the user is able to pre allocate a table on the tab labelled "Allocated Tables"
12. Enter any information into any remaining custom fields for the booking.

NB: The fields can be custom named should the user wish to have them renamed

13. Choose if Security is required, if the option is available
14. Choose if Minors are Attending, if the option is available

15. Enter an Estimated Revenue

NB: This field will be added to your Shift Budget "Expected Revenue" for the day should you be using Budgeting within your venue.

16. Enter an Estimated Wage Cost

NB: This field will be added to your Shift Budget "Required Wages" for the day should you be using Budgeting within your venue.

Customer Details Tab:

17. Enter any member link if the person making the booking is an existing member
18. Enter any Company details for the booking if it is a Company made booking
19. Enter any Notes to be added to the Booking for the customer

Deposits Tab:

20. In the Deposit field, enter the deposit to be made by the customer prior to the booking being held for the customer. Some booking Types can have a defaulted Deposit appear automatically. ***Leave the Deposit Paid box unticked*** so that it appears in the POS to be received from the client. Once the deposit is paid, the box will auto tick to show the deposit has been received.

Allocated Tables Tab:

21. If a booking has had an Area and Section chosen on the Booking Details Tab (points 9 & 10) the user has the ability to prebook a table for the booking. This allows a venue to know and see how many tables they have available at time of making the booking. Tables can only be chosen for bookings that have less than the amount of expected people arriving for the booking.
22. The "Price" field only needs to be entered if a specific pricing policy is being used for the booking
23. Click on Deposit field if anything different to the standard deposit is to be paid.
24. Click Estimated Revenue and type in the estimated revenue for the booking.

Nb: This will appear in the shift budget for sales for the day

25. Click Estimated Wage Cost and type in the estimated wage cost for the booking. This will appear in the shift budget for wages for the day

Schedule of Events Tab:

26. Click New
27. Click Time
28. Click in the Notes box to place special notes regarding the schedule of events for the booking
29. Click OK
30. Click Save

Follow Up Questions Tab:

31. Double click on each set question
32. Type in the response
33. Click OK

Nb: Not all questions need to be answered for the booking to be followed up.

34. Click Save

Booking Pricing Tab:

35. Bookings can have unique specific pricing available to that booking only.
36. To make a change to pricing for the booking choose the item by using the filter to find the product or recipe that requires a different change in price.
37. Double click the item required
38. Choose the type of discount that will be applicable to the booking for this item. The options include a Discount by Percent, a Discount by Dollars or a Fixed Price.
39. Choose the Product Base Price level (usually price level 1)
40. Click OK

Task List Tab:

41. Click New
42. Type in a description name of the task to be performed
43. Type in the notes of detail of the actual task that is required to be performed.
44. Choose the date that the task is going to be required by
45. Choose the amount of days prior to the booking that the task is required by
46. Choose what the minimum status needs to be before the task is required to appear.
47. Choose what the status should change to if the task is completed
48. Tick the Completed box if the task has been manually completed already
49. Click OK

Contact Log Tab:

50. Click New
51. Type in the Contact Name the person who made contact with the venue
52. Type in the Description actual details of the communication made.
53. Click OK

Documents Tab:

54. Click New
55. Locate any Documents that the user wishes to link to the booking
56. Click OK

Click Save on the overall Booking icon to keep the Booking active

DELETE / INACTIVATE A BOOKING

1. Click Bookings
2. Click View Bookings
3. Double Click the date of the Booking
4. Locate the booking to be Deleted / Inactivated
5. Click Customer Details Tab
6. Remove the tick from Active button
7. Click Save

POS BOOKING TASKS

Accepting a Deposit for a booking in BOSSII POS

Nb: This can only be done if the booking has been entered into BOSSII beforehand as per above

1. From the POS sales screen
2. Go to Options
3. Go to "Other Options"
4. Select "Pay Deposit"
5. Select which booking to put a deposit into
6. Select "Pay Deposit"
7. Select the deposit to be paid and the payment method
8. Select Accept Payment
9. Print a receipt for the deposit
10. Select "Finished"

Changing a Booking's details in BOSSII POS

1. From the POS sales screen
2. Go to Options
3. Go to "Other Options"
4. Select "Add/Edit bookings"
5. Select the booking required to be edited
6. Select Edit Booking
7. Make the changes required
8. Select Save

Confirming a Booking in BOSSII POS

1. Go to Bossii Admin
2. Click Bookings
3. Click View Bookings
4. Double Click the date of the Booking
5. Locate the booking
6. Highlight booking name and Select Edit
7. To confirm tick the "Confirmed" box
8. Select "Save"

Nb: This booking will now move to "Confirmed bookings"

STARTING A BOOKING IN BOSSII POS

Nb: A booking can only be allocated a table if it has been pre-arranged.

1. From the sales screen
2. Go to Options
3. Go to "Other Options"
4. Select Start Booking

Nb: Only bookings due to start on the day will appear

5. Highlight the booking required and press "Start booking"
6. Select a table to which the booking will be allocated
7. A question will appear "do you want to activate the booking to table …?"
8. Select yes
9. If a deposit was allocated and paid, the deposit will now appear as a negative balance on the tab
10. Select Cancel to exit and go to "table areas" to view the allocated booking