

# Reservation Management System Table of Contents

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## Reservation Management System

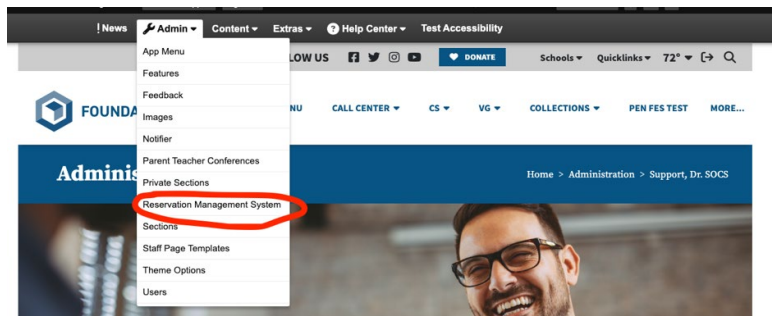
### To Enable the Reservation Management System:

1. Login to an admin account.
2. Admin → Theme Options
3. Scroll do the “Navigation Extras” section and select the “Reservation Management System” option. Remember you can move the options around to where they will display on the toolbar.
4. Type the name that you would like to call the Reservation management system on the site (Health Fair, Reservations, etc.).
5. Click the “Save” button to save your changes. It may take up to 3 minutes for the RMS to display in the navigation.

### Admin Users:

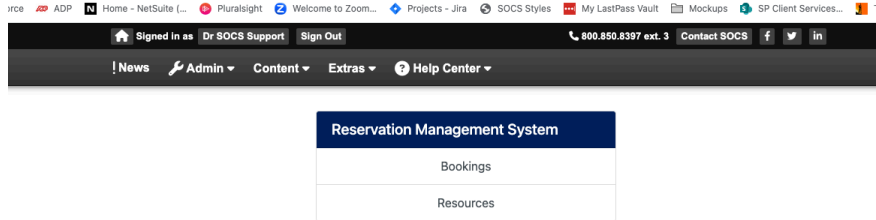
Login with your Admin user credentials.

From the Admin tab, select the Reservation Management System option:



To view the calendar of resources that have been booked, select the “Bookings” option.

To manage or add a Resource (conference room, park space, gazebo, etc.), select the “Resources” option.

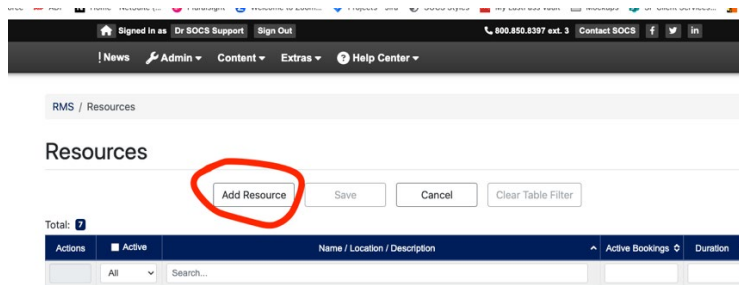


The Resources page will give you several options:

### Add a New Resource

**\*\*Reminder: *SAVE* all changes made when adding or editing a resource\*\***

Select the “add resource” option:



1. This will bring up a screen to allow you to add the details regarding your resource. You may add a resource and toggle the “Resource is Active” button if the resource is not ready for bookings at this time.
2. Complete the basic details for the resource
  - a. **Resource Name** (Health Fair, Campsite, Conference room, etc.)
  - b. **Description**

#### Add Resource

Resource is active

#### Basic Details

Resource Name (required)

Description

Source **B** **I** **U** **L** **Q** **A** **?**

Include pertinent details about your resource.

[Links](#) to documents, images, etc.

- You may format with **bold**, *italics*, bullets
- HTML can be added via the “source” button

body of it

This explanation of the resource will appear on your booking page and in confirmation emails

- c. Add the **Location** of your resource (physical address, or location of building, etc.).
- d. Add the **Duration** of your resource (appointment length, conference room slots, etc.).
- e. **Multiple bookings**: Number of bookings allowed. If left blank or 0 it will default to unlimited.
- f. **Maximum number of attendees**.
- g. **Attach Files** Add pertinent files and documents to the resource.

Location (required)

Duration  hours  minutes

Multiple bookings (zero/blank = unlimited)  consecutive time slots can be booked  
Ex. Volunteers signing up for "shifts" that vary in length

Maximum number of attendees  attendees  
Ex. Volunteers needed to work a shift

**Attach Files** (512M file size limit)  
 Add pertinent files and documents (e.g. facility features, rental/reservation agreements, maps) to the resource.

Actions	File Name	Description (link text)
Use the <b>Attach File</b> button to attach a file to this resource.		

- 3. Select the General availability (the times/days that the resource will normally be available).

**General availability (repeating weekly)**  
 Set when this resource is regularly available for reservations.

Sunday	Unavailable			<input type="button" value="+"/>
Monday	<input type="text" value="9:00am"/>	<input type="text" value="5:00pm"/>	<input type="button" value="-"/>	<input type="button" value="+"/> <input type="button" value="📅"/>
Tuesday	<input type="text" value="9:00am"/>	<input type="text" value="5:00pm"/>	<input type="button" value="-"/>	<input type="button" value="+"/> <input type="button" value="📅"/>
Wednesday	<input type="text" value="9:00am"/>	<input type="text" value="5:00pm"/>	<input type="button" value="-"/>	<input type="button" value="+"/> <input type="button" value="📅"/>
Thursday	<input type="text" value="9:00am"/>	<input type="text" value="5:00pm"/>	<input type="button" value="-"/>	<input type="button" value="+"/> <input type="button" value="📅"/>
Friday	<input type="text" value="9:00am"/>	<input type="text" value="5:00pm"/>	<input type="button" value="-"/>	<input type="button" value="+"/> <input type="button" value="📅"/>
Saturday	Unavailable			<input type="button" value="+"/>

- Use the dropdowns to the right of the time to select the time a resource is available for a specific day.
- Use the + and – buttons to add multiple times that a day is available.
- To make a specific day unavailable that would normally have availability (ex: Holidays, non-school days), use the “Adjusted Availability” by clicking the “Add Date” button and you will be presented with a calendar to select the date(s) that are not available.

Exception date

## Custom Fields:

Custom Fields are available to collect additional information pertinent to the booking.

**Custom Fields**

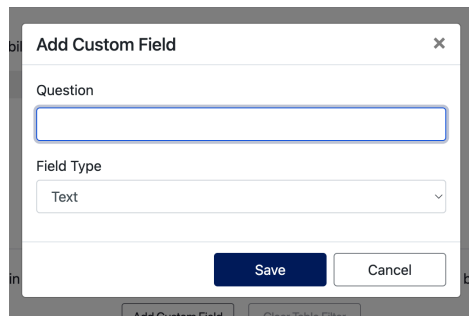
Manage fields that need to be collected in order to book this resource. Customer's name and email address will be collected at registration.

Total: 1

Actions	Active	Required	Order	Name	Type	Options	Default
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	1	Do you have a driver's valid driver's license?	Yes/No		Unanswered

Mark the box to make a field required or active.

Select the "Add Custom Field" to add custom fields to the resource booking:



**Question:** Text that will be displayed on the Booking form (Do you have a valid Driver's License?).

**Field type:** The format used to collect the response(s).

- Text area: Allows for text to be typed.
- Yes/No radio buttons.
- File: Allows for the upload of a file.
- Dropdown: Allows for multiple options to be selected from the dropdown field.
- Default Answer: Automatically select a specific answer.

## Notification Contacts:

A notification email can be sent to additional contacts when the resource is booked (example: a building support person who needs to set up the room).

You may add as many contacts as needed.

### Notification Contacts

First Name	Last Name	Email Address
<input type="text" value="Dr SOCS"/>	<input type="text" value="Support"/>	<input type="text" value="socssupport@fes.org"/>
<input type="button" value="Add Additional Contact"/>		<input type="button" value="Clear Table Filter"/>

Actions	First Name	Last Name	Email Address
Use the <b>Add Additional Contact</b> button to add another contact.			

## Notifications:

### Notifications

**Email confirmation**  
Send the customer and contact a confirmation whenever a booking for this resource is created, updated, or cancelled.

Send to Additional Contacts     Include resource description     Include links to attached files

Additional Information

Source | B | I | | | | | | ?

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Add additional information that will be included in the email confirmation

Toggle the “Send to Additional Contacts” button to send emails to the Notification Contacts added.

Once turned “on”, you can choose to include the resource description and include links to the attached files if desired.

## Email Reminders:

**Email reminders**  
Send reminder emails before bookings.

Actions	Timing	Send to	Message
Use the <b>Add Reminder</b> button to add a reminder.			

Multiple email reminders may be scheduled (example: 1 week prior to resource booking, morning of booking, etc.)

Click the “Add Reminder” button to schedule the reminder email:

Complete the details to send the reminder (timing, who to send the reminder to and message). SAVE your changes.

Add another email reminder if desired.

## Bookings

The Bookings section allows the admin to view/manage bookings for all resources.

August 2023						
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
30	31	1	2	3	4	5
		9:00am - 9:30am kj 3 times Location: Garage Door 1 Kurt Jaeger	9:00am - 9:30am Blaine's Trains Location: USA Kurt Jaeger		11:00am - 12:30pm Courthouse Room 1 Location: Courthouse Talia Klepper2	

1. Click the dropdown to select a specific resource(s) to view. Multiple resources may be selected.
2. Use the "Change Date" option to filter to a specific month or date.
3. Toggle between "All Days" or "Single Day."
4. Click "Today" to navigate back to the current date.

To review details or a specific booking date, select the time from the calendar option to select it.

Booking

Cancel Booking Back

Booking Details	
Date and Time:	Friday, August 25, 2023 12:00am - 4:30pm
Resource Name:	Klepper's B&B Rental
Location:	123 Main Street, Evergreen, Colorado
Customer:	Dr SOCS Support
Custom Field Information	
Is this your first visit to Klepper B&B?	Yes
Name of attendee 1	Frog
Age of attendee 1	Toad

To CANCEL the booking for this day, click the “cancel booking” button at the top or bottom of the page.

Cancel Booking ✕

Use the *optional* areas below to provide any additional information you would like to **include** in the cancelation email.

Customer Email

(e.g. reason for cancelation, what to do next, etc.)

Contact/Additional Contacts Email

(e.g. no need to rearrange the seating, etc.)

Cancel Booking Cancel

1. Enter any optional information you would like to include in your cancelation notification (example: Building is closed due to water leak, etc.).
2. Different information may be included for the customer or additional contact if desired.

**Standard Users:**

1. Navigate to the Reservations section from the Home menu.
2. Click the “Select” button next to the Resource you’d like to book.

**Note: You must be signed in to book a resource.**



Select a resource below to view the monthly calendar and create a booking.

Total: 14

	Name / Location / Description	Duration
Select	<b>Blaine's Trains</b> Location: USA Select from many classic locomotives.	30 minutes
Select	<b>Conference Room</b> Location: Conference Room Abundant outlets, chairs and desks. Overhead projector included.	2 hours 30 minutes
Select	<b>Courthouse Room 1</b> Location: Courthouse This courtroom is for marriages and include the Judges time to perform the ceremony. The fee for this booking is \$75.00 and must be paid at the time of arrival or click here to complete your payment in advance. You must download the marriage license form and upload the completed form below. *If you need to cancel your reservation, please contact the city office at info@cityoffice.co...	1 hour 30 minutes

3. Review the available dates from the calendar.

**Sign in or create an account to select an available time.**

The screenshot shows a booking interface. At the top, there is a calendar grid with dates from 3 to 30. The date 8 is selected. To the right of the calendar is a time slot selection menu with three options: 12:00 pm (available), 1:30 pm (available), and 3:00 pm (available). Below the calendar and time slots is a section titled "Additional Information" with three required questions: "Do you have your marriage license?", "I certify that I meet all criteria to get married in the state of Nebraska.", and "Please add any special requests:". Each question has a "Yes" radio button selected and a "No" radio button. Below these are three file upload sections: "Please upload your supporting documents.", "Are you a Nebraska resident?", and "Please upload your completed marriage license.". Each section has a "Choose file" button and a "Browse" button. At the bottom of the form are "Book" and "Back" buttons.

4. Complete any additional required information.

5. Click "Book" to complete your booking.

6. You will receive a confirmation email with your booking details.

