

SEVENROOMS

# DINING WEB TRAINING MANUAL

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This icon indicates that this function is customizable in the settings on the website. Please contact your venue administrator to adjust.

# RESERVATIONS

## 01 RESERVATIONS

View your reservations in a standard list format, with most pertinent information surfaced in this screen. Select specific reservations to dig in deeper about a particular reservation or client.

Black is blackout day

Grey is past/closed

White outline is today

Blue is the day you're currently viewing

When your restaurant runs out of availability, you can add internal requests to a waitlist for guests who wish to dine.

View reservations by shift

**FIVE FIGS**

Thu February 4

All reservations

Cover Flow

Add Request

Add Reservation

Search

NAME	COVERS	TABLE	PAYMENT	BOOKED BY	STATUS
12:00 PM (1 reservation) - 2 covers					
Howie Hoffman	2	03		Alex Kaplan	Self Message
12:15 PM (1 reservation) - 4 covers					
Kaes Thukaram	4			Joel Montaniel	Booked
12:30 PM (3 reservations) - 8 covers					
Alexander Chap...	2	06		Tim McDermott	Wrong Number
Michael Smedvig	2			Joel Montaniel	Booked
Tommy Hoerle (...)	4	09		Tim McDermott	Booked

### VIEWING RESERVATIONS

You can sort your reservations in different ways, including seating area or status of reservation.

Select this icon to close off a day to all external sources

Add notes for the day to communicate important messages to your team

Print or e-mail reservation list

Thu Feb, 4

ALL LUNCH DINNER All reservations

	12:00 PM	12:15	12:30	12:45	1:00 PM	1:15	1:30	1:45	2:00 PM	2:15	2:30
covers	2	4	8	10	6	-	2	4	-	2	-
	2	4	4	4	4		2	4		2	
			2	4	2						
			2	2							
reservations	1	1	3	3	2	-	1	1	-	1	-
total booked:	38 covers		38 upcoming		0 seated		0 completed				

## 02

### COVER FLOW

Access cover flow to view cover-pacing by shift and time. You can see current and upcoming covers.

Click this icon to print the cover flow for an overview of the entire day or for specific shifts.

# RESERVATIONS

## 03 BOOKING NEW RESERVATION

To book a new reservation, click on 'Add Reservation' on the top right and fill in the details of the reservation

NAME	COVERS	TABLE	PAYMENT	BOOKED BY	STATUS
12:00 PM (1 reservation) - 2 covers					
Howie Hoffman	2	03		Alex Kaplan	Booked
12:15 PM (1 reservation) - 4 covers					
Kaes Thudkaram	4			Joel Montaniel	Booked
12:30 PM (3 reservations) - 8 covers					
Alexander Chap...	2	06		Tim McDermott	Booked

Once a request is added, you can access the list of internal requests in the request tab. You will be able to manage requests, converse with clients, and convert requests to confirmed reservations.

Current status of a reservation:  
Open reservation to adjust the status of a reservation.

- Client database will populate to the left of the reservation form as you begin typing the name. Be sure to select the client if they already exist in your database to link the new reservation with the existing profile. If the client does not already exist, a new profile will be created.

### Slider

Use the slider to indicate the range of times a guest is looking to dine. This with further narrow your search to indicate availability.

### Availability lookup

Current covers booked



Superusers & Managers have the ability to override table, time and cover availability.

- To add tags, client groups and more client profile information, click here.



This icon indicates that this function is customizable in the settings on the website. Please contact your venue administrator to adjust.



## RESERVATIONS (CONT'D)

### 04 RESERVATION FLYOUT

Access information, modify, and cancel reservations. Select a particular reservation to learn more about the reservation itself, correspondence, and dive further into the profile information of the guest.

#### RESERVATION (M)

Access Reservation information

#### MESSAGES (P)

Select the messages to view past correspondence about a reservation. Send personalized emails to guest directly through the SevenRooms messaging portal. Responses can be found here as well.

#### CLIENT PROFILE (A)

To see additional information and history about this client, access client profile here.

#### RESERVATION PAYMENTS ( \$ )

Bank account can be set up by an administrator to charge a guest for a reservation, private event deposit, or other payments associated with a reservation.

#### LIST OF CONSOLIDATED ATTACHMENTS ( @ )

Attachments can be added through messages to and from a guest, as well as internal notes. All attachments associated with a reservation will appear and be accessible through this section.

#### RESERVATION HISTORY (W)

View all history about a reservation. This includes, but not limited to, when a reservation was initially requested, who fulfilled the request, edits made following a reservation, and any cancellation activity.

#### CANCEL RESERVATIONS (Z)

To cancel a reservation, expand the 'change status' and select "Cancel." You can choose here whether to alert the guest via email of the cancellation, or choose not to have the cancellation sent."

\*\*Reservations can be cancelled on the iPad as well.

" ... "

To resend a confirmation email, expand this menu. Email will resend to the email address listed within the client profile.

#### MODIFY RESERVATIONS

Click Edit to return back to the original edit view.

All adjustments made on a reservation will appear in your activity history with an indication of the user account who made the edit.

When in the edit mode, you can also make adjustments to the client profile, such as adding tags, editing contact information, birthday, etc.



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# GRID

## 05 GRID VIEW

Utilize the Grid view to maximize capacity.

**FIVE FIGS**

Feb 4, 2016 | All reservations | Cover Flow | Add Block | Add Request | Add Reservation

**ASSIGNED**

Time	12:00 PM	12:30	1:00 PM	1:30	2:00 PM	2:30
<b>Dining Room</b>	2	14	30	32	34	32
03 2 top	2 <b>Howie Hoffman</b> Owner of clothing company		2 <b>John Lee</b> Amazing client! Likes amaretto after dinner.			
04 2 top			2 <b>David Hanrahan</b> Repeat client.			
03 2 top			2 <b>Sari Mendelson</b> Hedge Funders. Stay attentive to this party			
<b>UNASSIGNED</b>						
4 top	4 <b>Kaes Thukkaram</b> Always requests Jenny, seat in that section					
2 top	2 <b>Michael Smedvig</b> Favorite salad: Kale					

## 06 BLOCKS

Add blocks to your books within the grid view. You can block specific tables or seating areas, determine the time and date or range it should be blocked for, and decide who can override blocks.

Managers and Superusers are able to override reservations on a blocked table or seating area.

If the blocked slot is not replaced with a reservation by specific users, you can choose to release the block to the general reservation team and/or website, which will behave as standard availability.

Determine users or user types to have access to override blocks.

**ADD BLOCK**

Name this block  
Manager VIP block

Which tables/seating areas should be blocked?  
☒ Table(s) or area(s)  
 02, 03, 04

What time should the block occur?  
☐ All times  
☐ All times during a particular shift  
☒ Custom time range  
 7:00 PM to 8:30 PM

How often should the block occur?  
☒ On a single date  
 Thu, Feb 4  
☐ Repeat on a custom date range

Who can override this block?

When should this block be released?  
 1 hour

**Add**

# FLOORPLAN

## 07 RESERVATION

Access your floorplan on the web portal to pre-assign seating and add reservations directly to available tables.



• Pre-assign tables to reservations by selecting a reservation from the left-hand list, selecting a table, and then hitting save.

• If you have a multi-room venue, use these selectors to switch between different rooms.



- The floorplan view on the web portal is NOT to be used during service. Guests cannot be checked in on the web portal. To manage your floorplan in service, an iPad is required, and the SevenRooms app must be downloaded.
- Capacity of table & table combinations can be adjusted by an administrator in settings.
- Move and add tables on the iPad at any time.  
Visit Settings > Floorplan > Layout > and follow iPad instructions.



# REQUESTS

## 08 MANAGING REQUESTS

Manage your organized inbox of requests that have been added internally, received from your website or sent through a concierge.

Filter and sort to view the inbox in many different ways: shift requested, date of reservation requested, source of request, or the assigned staff member.

**FIVE FIGS** Search by venue name Sandra Lee Five Figs

Sort by: Last communication

Search

NAME	RES DATE	TIME	GUESTS	MESSAGE	CREATED	LAST
★ Alexander Ch...	Fri, Feb 12	8:45 PM - 9:15 PM	2	NEW	10:52 AM	12:25 PM
★ Pascal Schnei...	Sun, Feb 14	12:15 PM - 1:00 PM	2	NEW	10:51 AM	11:10 AM
IB ★ Dimitri Gohar...	Thu, Feb 11	6:45 PM - 7:30 PM	2		10:50 AM	2:40 PM
IB William Bradl...	Tue, Feb 9	7:00 PM - 8:00 PM	2		10:49 AM	1:34 PM
HP ★ Tim Mcdermo...	Thu, Feb 11	12:45 PM - 1:30 PM	2		10:48 AM	11:41 AM
★ Lucy Seagram...	Wed, Feb 10	5:00 PM - 10:30 PM	2	NEW	Feb 4	Feb 10

**RESPONSE NEEDED** EXPIRES IN 18 DAYS

Lucy Seagram  
+1 (233) 322-5678

Request

Wed, Feb 10 5:00 PM 2 guests

NEW  
Lucy S requested Wed, Feb 10 at 5:00 PM for 2 guests in town for the evening. Do you have a la carte?

Message Lucy | Add internal note | Actions

Assigned + Followers +

## 09

### VIEWING & RESPONDING TO REQUESTS

- View **activity** history.
- View a consolidated **list of attachments** within this specific request.
- Message** your client directly from the SevenRooms web portal or from any email notification. **Send attachments** within the message.
- Add an internal note** about the request to communicate important updates to the rest of your team. These will NEVER be shown to guest.
- Add multiple **followers** to a request to receive email notifications whenever there are updates on the request.
- Assign** a user to a request. The user will receive an email notification with the request details to take action.



#### Can I automatically assign my staff to a requests?

Yes! In each user account, select "auto assign" to include that staff in round robin assignments. Staff will receive an email alerting them they have a new request they are responsible for managing.



## REQUESTS (CONT'D)

### 10 TAKE ACTION ON A REQUEST

RESPONSE NEEDED EXPIRES IN 10 DAYS

Evan Fishman  
+1 (233) 322-5678

Request

Tue, Jan 9 7:00 PM 2 guests

NEW  
Evan F requested Tue, Jan 9 at 7:00 PM for 2 guests in town for the evening. Do you have a la carte?

Message Evan or Add internal note

Assigned Followers

Book this request

MAIN DETAILS

Start

Tue 9 Wed 10 Thu 11 Fri 12 Sat 13 Sun 14 Mon 15 Tue, Jan 9

Duration

3 4 5 6 7 8 Other...

Style

Dinner

Duration

1 hour 30 minutes

Time of

7:00 pm 8 / 20

ADD MORE PROFILE DETAILS

ADD PAYMENT DETAILS

Book

**BOOK NOW** will convert an existing request directly into a reservation. You can adjust details on the reservation, and send a confirmation email directly to your client.

A client profile will be created if the client doesn't already exist. If the client already exist this reservation will be attached to their profile.

#### ACCEPT

Accept existing request as is.

**DECLINE** will let the client know that you are unable to accommodate their request. Optionally, add a personal message to let the client know why.

Decline request

Tue, Jan 9 7:00 PM 2 guests

Add a personal message to Evan (optional)

Type message here...

Save client profile

Send decline notification

Save client to a client database without having to accept a reservation.

Trash request

Tue, Jan 9 7:00 PM 2 guests

Are you sure you want to trash this request?

(Notification will not be sent to the client)

Save client profile

Trash request

**TRASH** will remove the request from the queue completely without notifying the client.

# CLIENTS

## 11 IMPORT CLIENT PROFILES

Upload your client data from any number of existing sources by adding it to the custom template created for your venue.

Your template can be found within your Clients tab > Import > Download .xlsx.  
To import client profiles, you **must** use our provided template.

The screenshot shows the FIVE FIGS CLIENTS interface. On the left is a sidebar with navigation options: Reservations, Grid, Timetable, Guest List, Requests, and Clients. The main area is titled 'CLIENTS' and includes a search bar, filters, and tags. A table lists client profiles with columns: NAME, COMPANY, JOB TITLE, SPEND, SPEND/COVER, VISITS, and PROFILE NOTES. The 'Import clients' button is highlighted with a red circle and the number 1.

NAME	COMPANY	JOB TITLE	SPEND	SPEND/COVER	VISITS	PROFILE NOTES
Bergson, Ryan	Fidessa	Business Development	\$34,165	\$438	24	
Brady, Tom (VIP)	New England Patriots	Quarterback	\$26,328	\$346	31	Loves dining with us; never sits next t...
Bernstein, Zivi (VIP)	Amex	Chief of Staff	\$21,177	\$481	16	
Chejade-Bloom, Jenna...	New York Times	Owner	\$19,349	\$322	47	Usually dines with clients
Mcdermott, Tim (VIP)	SevenRooms	Director	\$17,814	\$159	39	Enjoys great conversation about Ital...
Thornton, Billy	SAG	Actor	\$16,339	\$278	13	

**IMPORTANT:  
IMPORT CAN NOT  
BE UNDONE.**

### IMPORT CLIENTS FILE UPLOAD



Download XLSX Template

Use our Excel template to upload new clients to our system here. Please download the template below and fill in or paste your client data, then upload it.

**Important:** please upload a maximum of 4000 clients at a time.

**MORE IMPORTANT:** imports cannot be undone.

Upload an XLSX **Choose File** No file chosen

**Preview**



Download a new template each time you do an import, so it's always up-to-date with any new system tags or client groups that have been added.

## 12 MERGING CLIENT PROFILES

If a client has multiple profiles, it's important to **merge** them to keep duplicates out of your database. Search for the client in the search box, select the check next to all profiles associated with the same client, and click Merge. On the following screen, you will be able to select the data that should remain on the surviving profile.

The screenshot shows the FIVE FIGS CLIENTS interface. On the left is a sidebar with navigation options: Reservations, Grid, Timetable, Guest List, Requests, and Clients. The main area is titled 'CLIENTS' and includes a search bar, filters, and tags. A table lists client profiles with columns: NAME, COMPANY, JOB TITLE, SPEND, SPEND/COVER, VISITS, and PROFILE NOTES. The 'Merge' button is highlighted with a red circle and the number 1.

NAME	COMPANY	JOB TITLE	SPEND	SPEND/COVER	VISITS	PROFILE NOTES
Brady, Tom (VIP)		Quarterback	\$34,165	\$438	24	Loves dining with us; never sits next t...
Brady, Tom	New England...		\$34	\$34	1	
Bernstein, Zivi (V...	Amex	Chief of Staff	\$21,177	\$481	16	
Chejade-Bloom, ...	New York TL...	Owner	\$19,349	\$322	17	Usually dines with clients
Mcdermott, Tim L...	SevenRooms	Director	\$17,814	\$159	39	Enjoys great conversation about Ital...

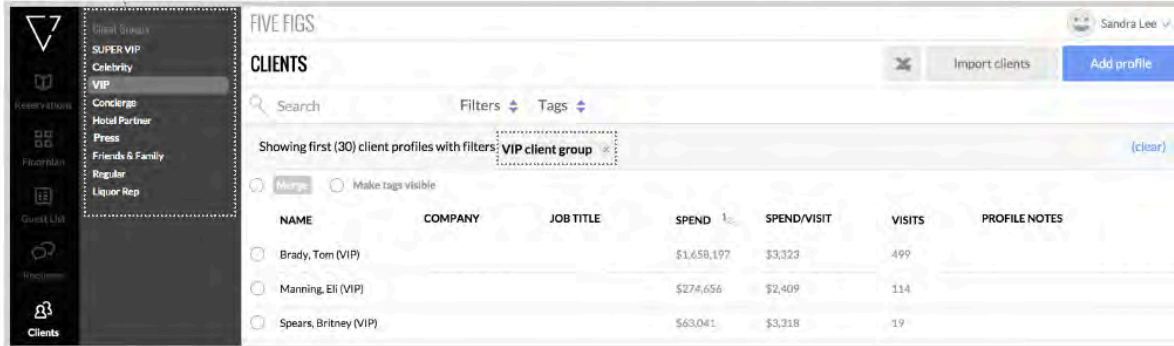
## CLIENTS (CONT'D)

### 13 CLIENT GROUPS

Client groups indicate who a client is, such as VIP, Regular, Press, etc.

- Quick links to clients in the groups specified.

Admin: to create Client Groups select Settings > Client Groups> Add Client Group



The screenshot shows the 'FIVE FIGS CLIENTS' interface. On the left is a sidebar with navigation links: Client Groups, SUPER VIP, Celebrity, VIP, Concierge, Hotel Partner, Press, Friends & Family, Regular, Liquor Rep, Guest List, Requests, and Clients. The main area has a search bar and filters. A filter is applied: 'VIP client group'. Below the filter, there are two radio buttons: 'Merge' (selected) and 'Make tags visible'. A table lists client profiles with columns: NAME, COMPANY, JOB TITLE, SPEND, SPEND/VISIT, VISITS, and PROFILE NOTES. The table shows three clients: Brady, Tom (VIP), Manning, Eli (VIP), and Spears, Britney (VIP).

NAME	COMPANY	JOB TITLE	SPEND	SPEND/VISIT	VISITS	PROFILE NOTES
Brady, Tom (VIP)			\$1,658,197	\$3,323	499	
Manning, Eli (VIP)			\$274,656	\$2,409	114	
Spears, Britney (VIP)			\$63,041	\$3,318	19	

### 14 TAGS & FILTERS

Tags indicate preferences of a client, such as favorite liquor or dietary restrictions. Filter your database by birthday, gender, number of visits and more by clicking on Settings.

Make tags visible to expand tags to client view.



The screenshot shows the 'FIVE FIGS CLIENTS' interface with a client profile expanded. The client is 'Puckett, Blake'. The 'Tags' section is visible, showing various categories like Client Origin, PX Coding, and Allergies/Doesn't Eat. A 'Filters' dropdown is open, showing a list of filters with 'Any' selected for each. A callout box on the right says: 'If you have access to export Export entire client database or filtered list of clients.' The sidebar on the left is the same as in the previous screenshot.

Client Origin: Atlanta, Austin, Boston, Chicago, DC, Dallas, Dubai, LA, Las Vegas, Miami

PX Coding: BUBBLES, Dessert, Drink, Event PX, F/O, LOL, LSFN, PPX, PX, SFN, VIP Shots

Allergies/Doesn't Eat: Dairy, Fish, Gluten Free, Hazelnut, Kosher, Meat, NFU, PR, Repeat Client, SNFU, VVIP, VVIP++

Filters: Vip, Visits, Last Visit, Birthday, Rating, Gender, Contact Info, Venue, Client Group, Booked By. All set to 'Any'.

 This icon indicates that this function is customizable in the settings on the website. Please contact your venue administrator to adjust.