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

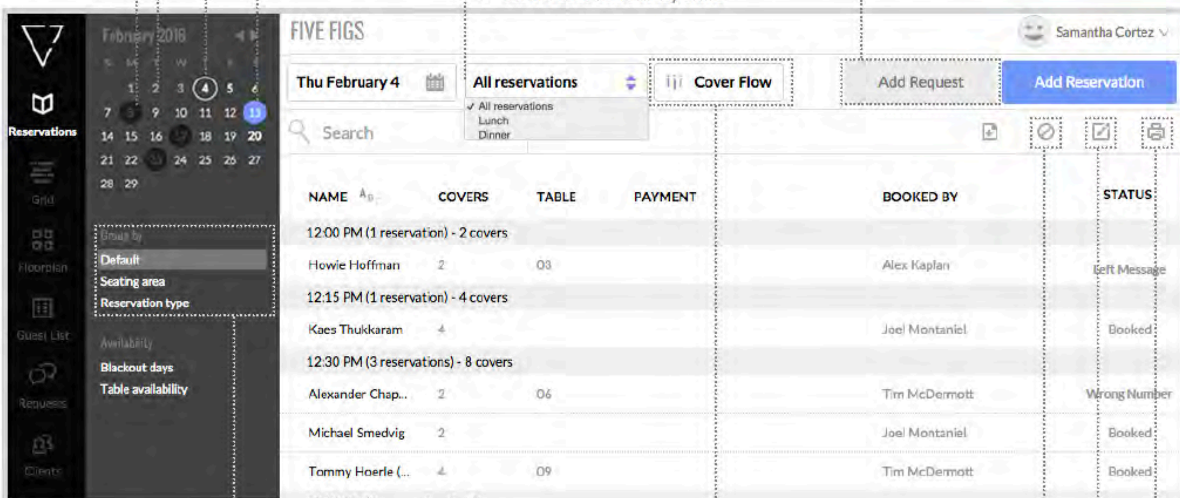
Grey is past/closed

White outline is today

Blue is the day you're currently viewing

View reservations by shift

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



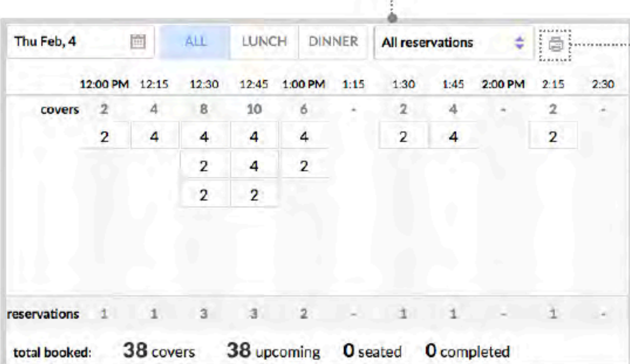
Select this icon to close off a day to all external sources

VIEWING RESERVATIONS

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

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

Print or **e-mail** reservation list



02 COVER FLOW

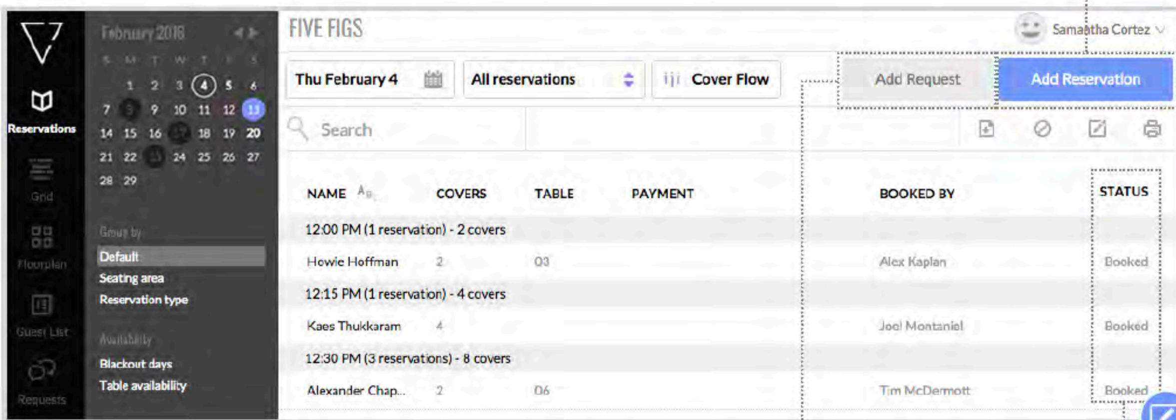
Access cover flow to view cover-pacing by shift and time. You can see current and upcoming covers.

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

RESERVATIONS

03 BOOKING NEW RESERVATION

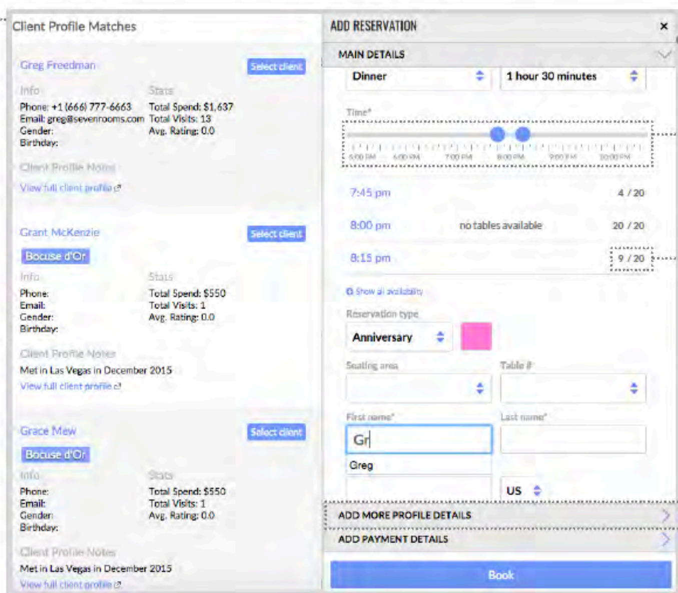
To book a new reservation, click on **'Add Reservation'** on the top right and fill in the details of the reservation



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.

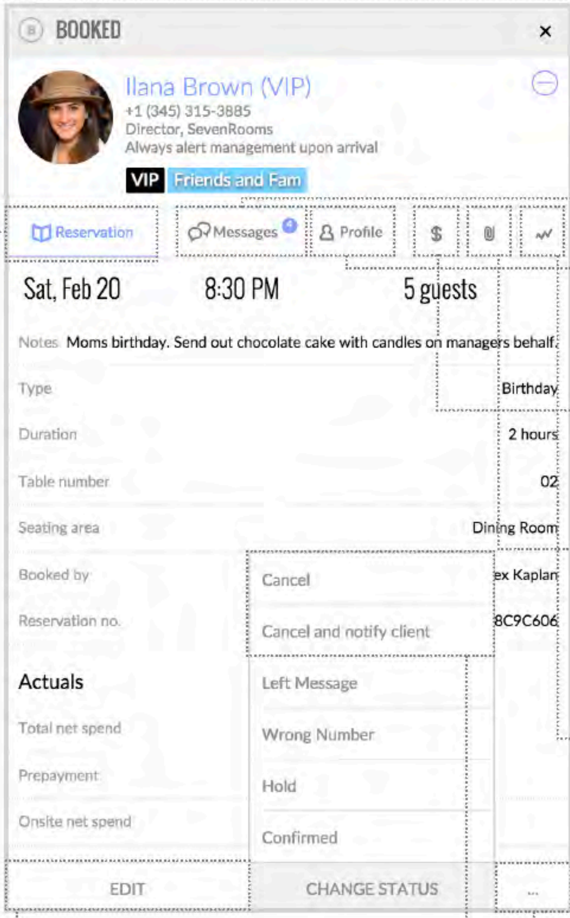
To **add tags, client groups and more client profile information**, click here.

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

Access Reservation information

MESSAGES

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

CLIENT PROFILE

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

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

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.

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 a adding tags, editing contact information, birthday, etc.

"..."

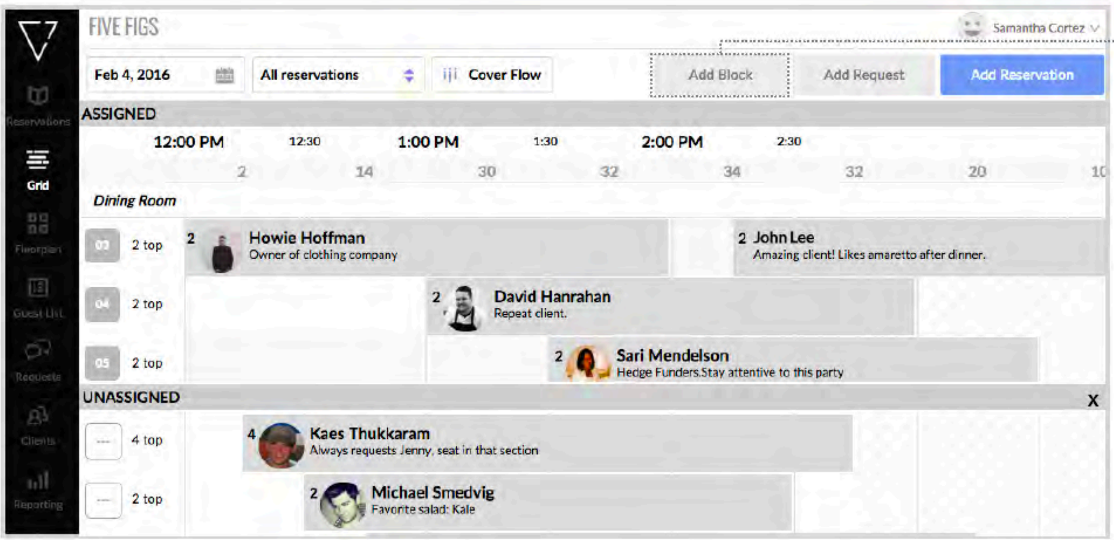
To resend a confirmation email, expand this menu. Email will resend to the email address listed within the client profile.

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

GRID

05 GRID VIEW

Utilize the Grid view to maximize capacity.



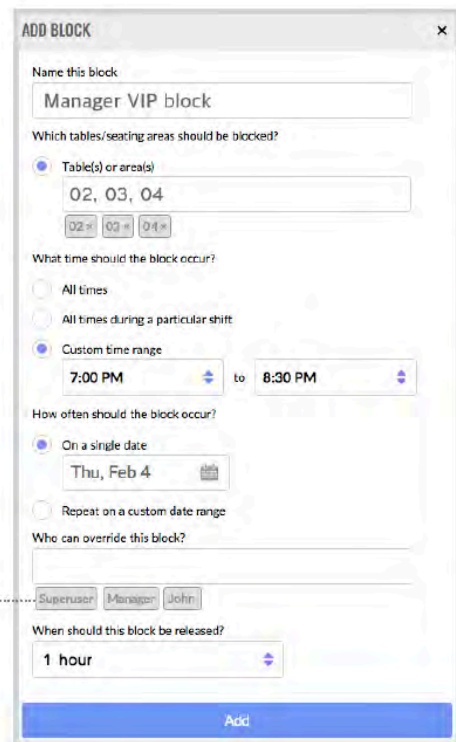
06 BLOCKS

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.



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.

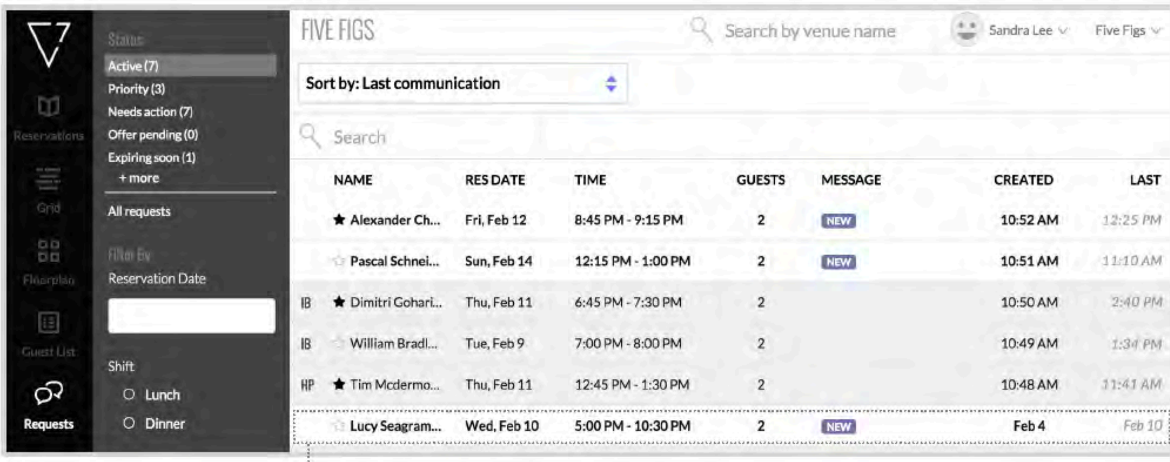
REQUESTS

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.



09

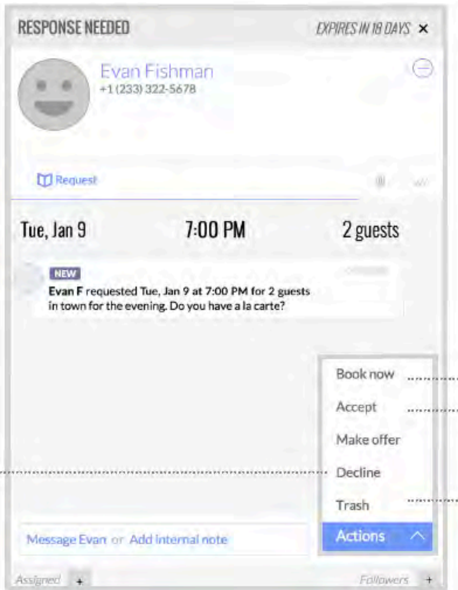
VIEWING & RESPONDING TO REQUESTS

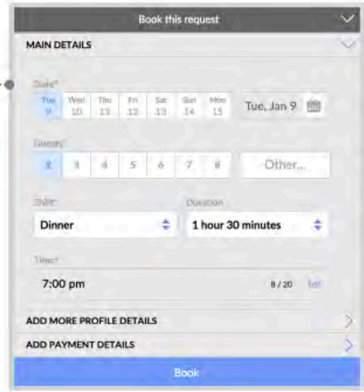
- View **activity** history.
- View a consolidated **list of attachments** within this specific request.
- **Message** your client directly from the SevenRooms web portal or from any email notification. **Send attachments** within the message.
- **Add an internal note** about the request to communicate important updates to the rest of your team. These will NEVER been 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





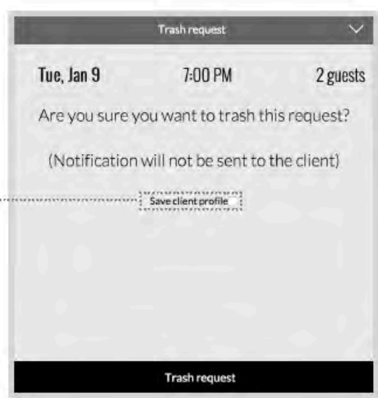
BOOK NOW will convert an exising request directly into a reservation. You can adjust details on the reservation, and send a confirmation email directly to your client.

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.

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



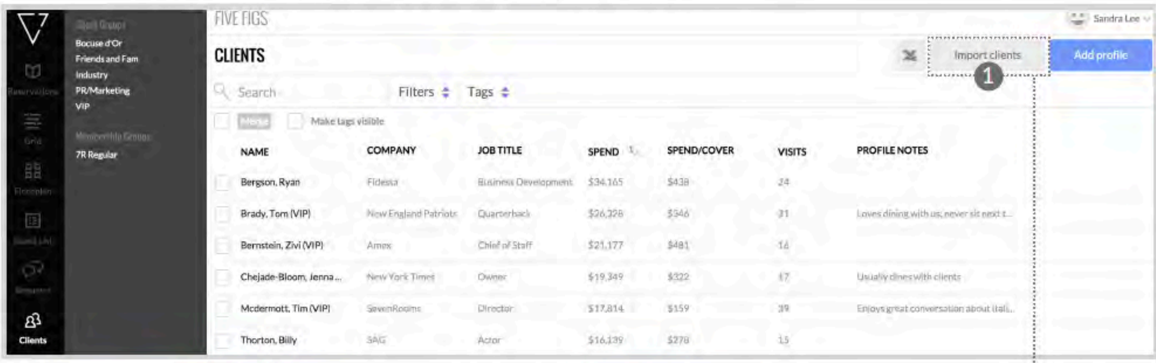
Save client to a client database without having to accept a reservation.

CLIENTS

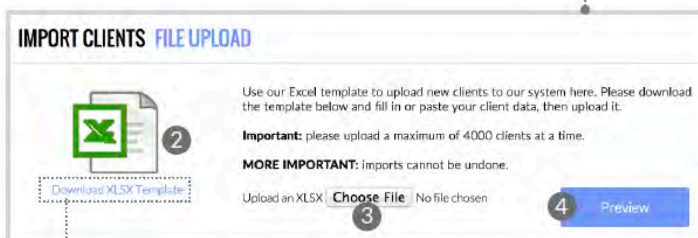
11 IMPORT CLIENT PROFILES

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.



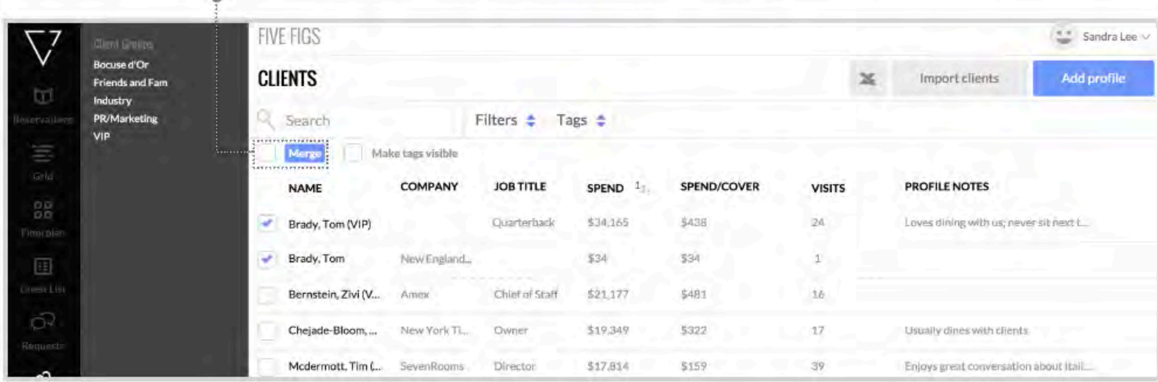
IMPORTANT: IMPORT CAN NOT BE UNDONE.



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.

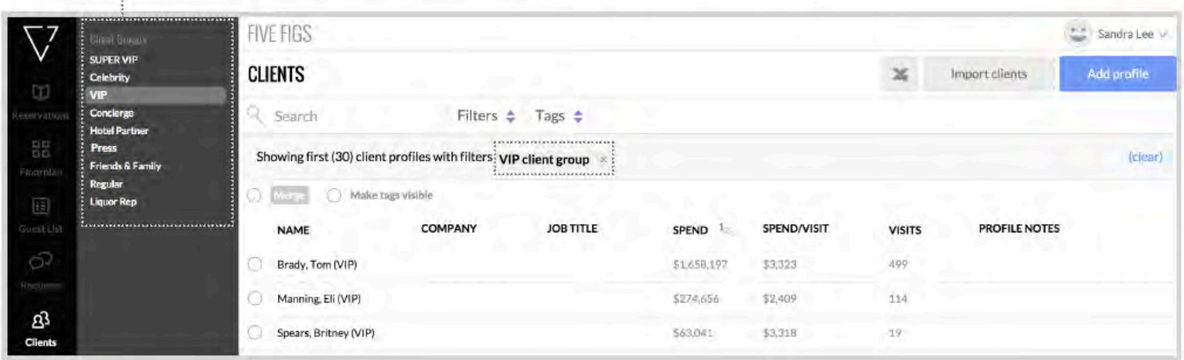


CLIENTS (CONT'D)

13 CLIENT GROUPS

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

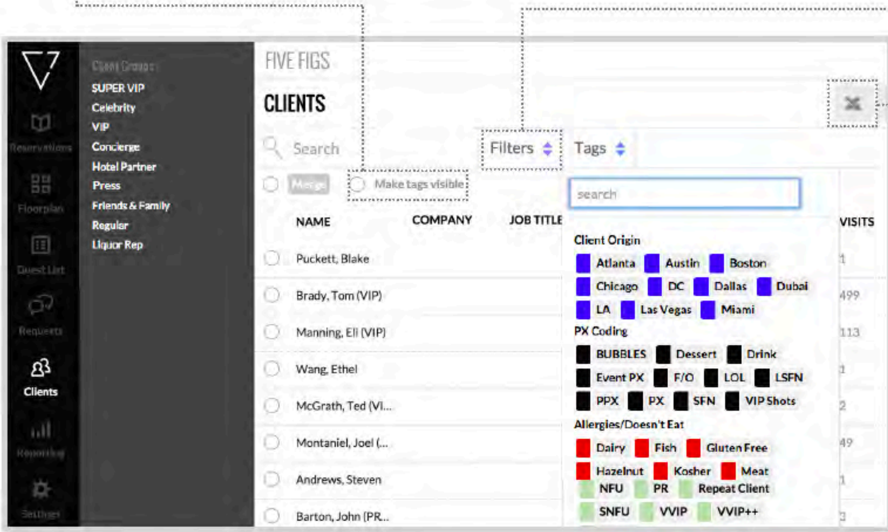
Quick links to clients in the groups specified.
Admin: to create Client Groups select Settings > Client Groups> Add Client Group

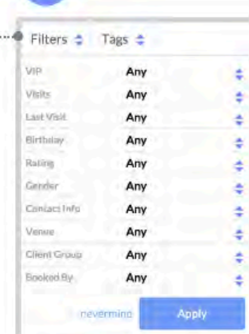


14 TAGS & FILTERS

Tags indicate preferences of a client, such as favorite liquor or dietery 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.





[If you have access to export]
Export entire client database
or filtered list of clients.

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