

Managing Reservations, Bookings, and Equipment Hire in MyBusiness

Introduction

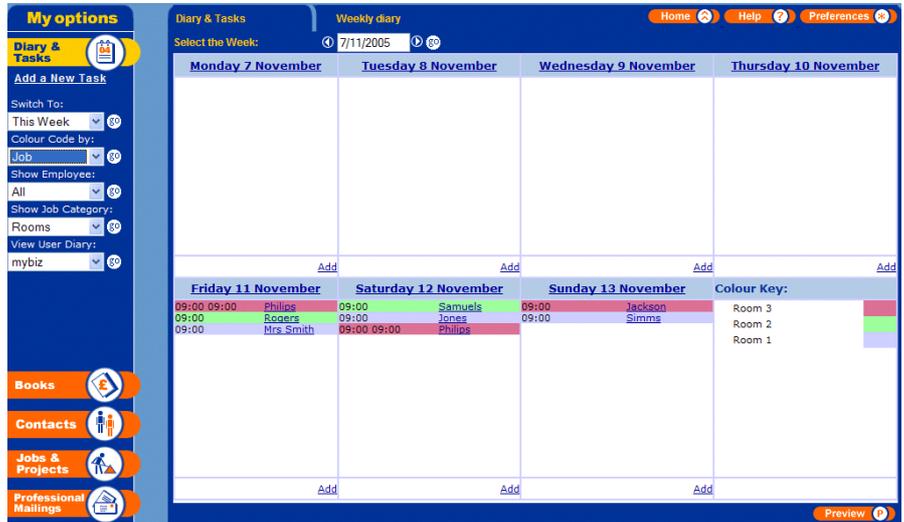
If you are a small hotel or restaurant, or provide facilities or equipment, MyBusiness can easily help you manage reservations and bookings.

What's covered in this guide

This guide will show you how to:

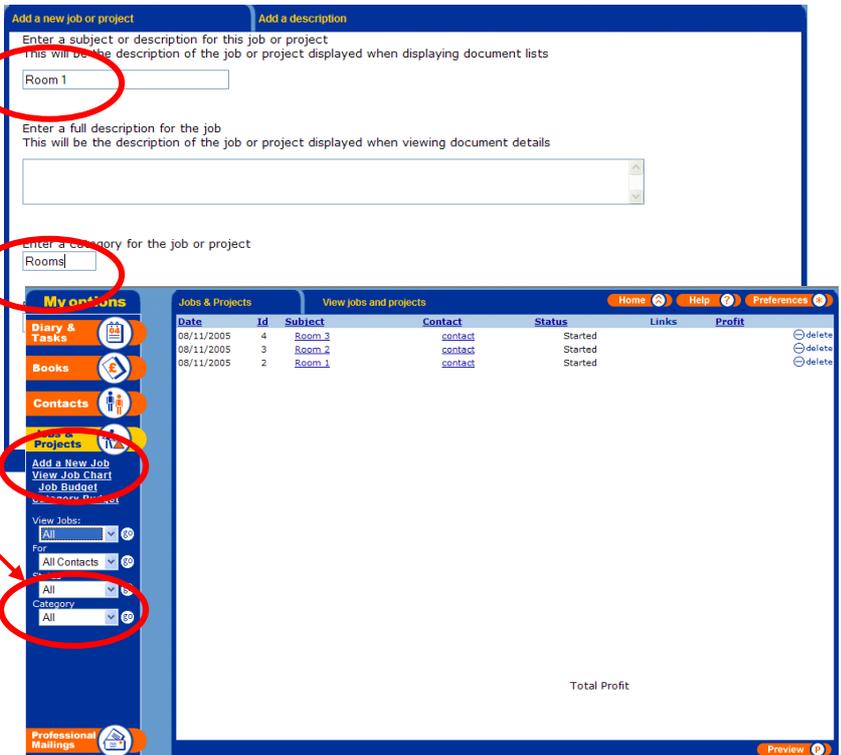
- Set up project categories and individual projects for the items that you want to book out (this will allow you to have a colour coded diary view selection for just these items showing when they are booked out).
- Create appointments and link them to projects and contacts
- Set the diary and project views, to view just the booking items to check availability
- View all of the activities or costs associated with that item.
- Follow up guests for future contact and mailshots.

The guide will follow the example of a small hotel booking out 3 rooms, but it could also be used to reserve Tables and it is just as relevant for equipment hire (or tracking the activities of a Department or Division).



Set up projects for Rooms

Go to Jobs and Projects and select Add a New Job. Set up a Job called "Room 1" (or you might add a code such as "D" for a double room and "S" for single), type in a category called "Rooms", link it to a contact "Customer", and add any comments regarding price, facilities etc.. Do the same for Room 2 and Room 3.



You can now select to view just the Category of Rooms in the jobs view options.

You can follow this process for "Tables" and "Table 1", or "Equipment" and "Crane" or "Digger".

Note that you can now link activities, invoices, costs and quotes etc.. to these projects and view them within projects.

Make a reservation

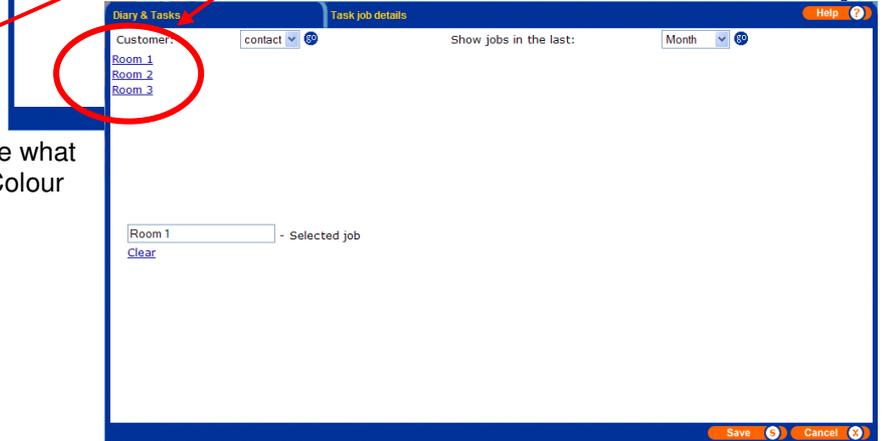
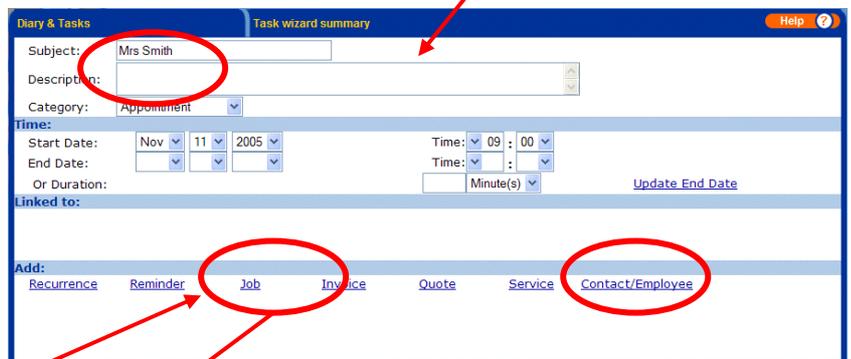
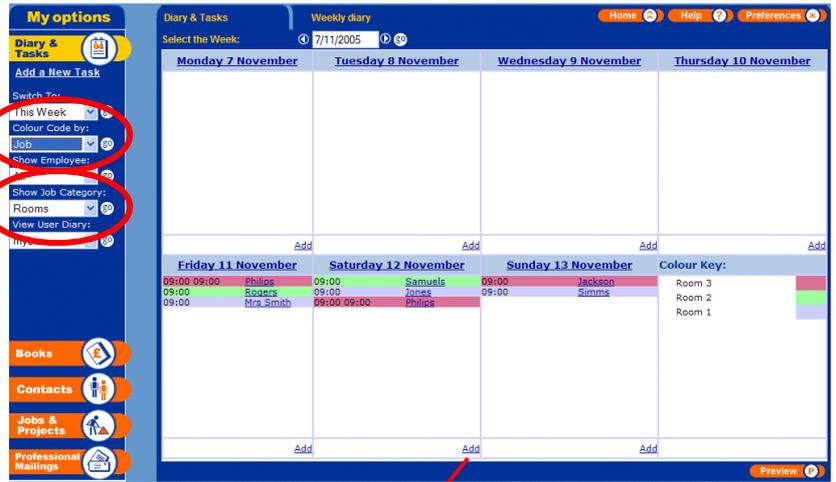
If Mrs Smith rings up to book a room you can check your room availability by selecting to view your diary by category of Rooms and colour code by Jobs (you'll see how this diary gets to add its colour coding soon).

Once you have identified an available room on the required day select Add a New Task (or Add) enter the name of the person staying – you can also create a new contact in your Contacts by selecting to link to a Contact/Employee and entering a new name (you can enter address and other details if you wish later).

You will be able to go to this contact details page in the future and select tasks to find when they are staying or previous times they have stayed etc..

Add any comments or details in the description about the people staying or the nature of the stay.

Select to link a Job to this appointment and choose the relevant Room. When Saved, this appointment will appear in the diary, and every Job will have its own colour code so that you can easily see what days it is booked out. In the diary select Colour Code by "Job" and Job Category "Rooms"



Managing your guests or customers

When you set up your contact you can set them up as different types eg. "Hotel" and "Festival" (eg. if they visited you for a local festival). You will be able to select all of the contacts in this category and send mailshots to them.

From View at the bottom you will be able to view all activities (or bookings) ever made for this contact and all payments etc.. From Create a New you can create a new appointment or booking, create an Invoice (in receipt template perhaps). You might also want to set up a reminder to contact this guest next year before the festival to see if they will need a room again.

