SimplyBook.me Configuration

Introduction

The CommunityGiftCards **Marketplace**, is a web page that is visited by gift card holders, to see where their cards can be used. This web page provides a way for those gift card holders to "Book a Tour" at various places of business. The system does this by connecting to your Tour Operator software product, and interacting with it by:

- listing which tours are available to be booked, based on the number of people and the date;
- determining what information needs to be collected (number of people by "category", which tour, what date, what customer information is required, etc.);
- and creating a booking with all the relevant information, directly in your software

General Flow

Note that with the Simplybook.me interface, the gift card holder can only book a tour – there is no mechanism for directly identifying those tours as "paid", regardless of whether there was enough balance on the gift card or not, to cover the cost of the tour. At the very least, the gift card platform is another means by which you can get additional tour bookings. You may choose to "wait" until the customer arrives in order to use their gift card to redeem, or you can send them an invoice if you prefer to get paid immediately.

The "typical" flow is as follows:
- Customer visits Community Gift Cards Marketplace
- Customer clicks on "Book a Tour", then selects the date that they're interested in, and the number of people that they're booking for
- System displays available tours
- Customer selects which tour they want to book, and the system prompts them for all of the relevant information as defined in your Simplybook.me account (the system provides an estimate of the total price as they make edits)
- Customer clicks on "Get Total Price"
- System submits all of the customer supplied information to SimplyBook.me (to get total pricing including taxes, based on all of the customer's selections), and the System creates a temporary "hold" (valid for 5 minutes only). The System presents this information to the Customer. The customer has the option to "check-out", or to go back and change their selections (and a new "hold" will be created if they do so).
- Customer will click on Complete Booking
- System will submit all the same information as above to Simplybook.me and "commit" the booking (releasing the "hold")
- Simplybook.me will respond indicating whether the booking was successful, and if so, Simplybook.me will send communications to you and to the customer according to your settings in Simplybook.me.

- then LATER (on the date of the tour)
  - Customer visits your place of business, and presents their gift card
  - If you have already collected payment from the customer (you did not want to wait), then you may either choose to refund their existing payment and redeem their card, or you may simply tell them that they have already paid and the gift card cannot be used (we recommend that you do the former).

- then LATER (based on the settings in the System)
  - a direct-deposit is performed, directly into your bank account, for the amount(s) that was/were redeemed on the gift card (if applicable).

SimplyBook.me Configuration Settings

Custom feature – Group Bookings: For tours, there is always the possibility that the customer is booking the tour for more than 1 person. In order to make this possible, the "Group Bookings" custom feature must be enabled...go to Custom Features, and search for "group" at the top, and make sure Group Bookings is enabled...when you click on Notifications, the field "Max allowed bookings at a time" will be the maximum number of people allowed for a single booking … this must be **non-zero**. Note that with the Simplybook.me system, there is no way to determine how many "open seats" there are, so whatever you input as this value, will be the maximum # of people that can be booked in one booking, regardless of how many "spots" remain open.
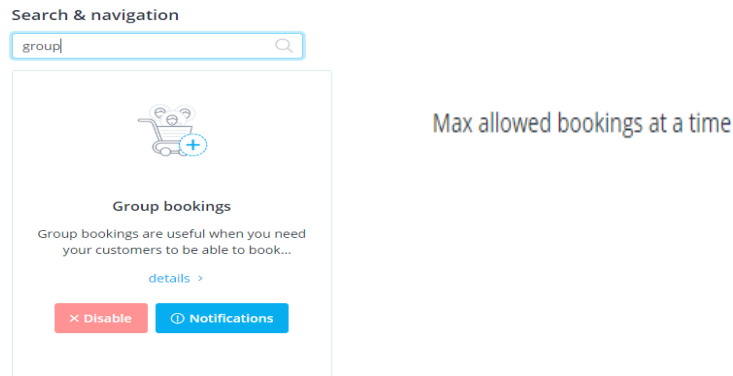
Custom feature – Accept Payments: In order for the gift card platform to present pricing information, you must set prices for your tours in SimplyBook.me, and in order to set prices, you must have the "Accept payments" custom feature enabled. **NOTE** that the SimplyBook.me system does ***NOT*** allow for a mechanism for this system to provide payment information, so you will need to also enable the "delay payment" option – at the very least, you can get bookings from the gift card platform, but you will need to follow-up with customers yourself in order to get paid if you don't want to wait – the best way to do this is to set a reasonable "time-out", and to send an invoice.
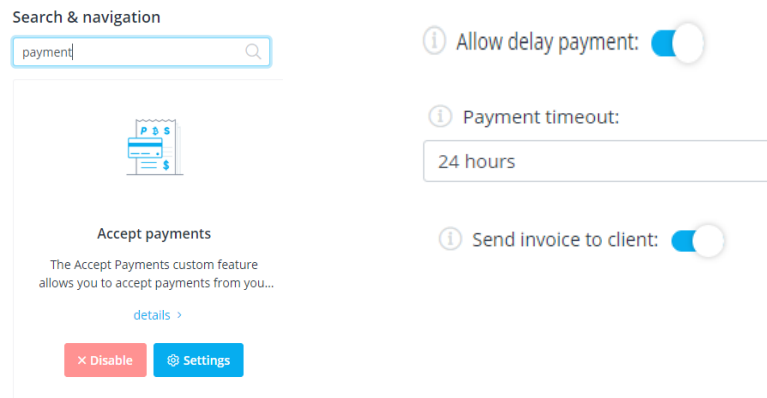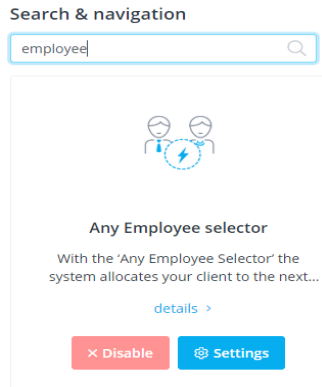
Note that for your own web site, if you use the SimplyBook.me booking engine / widget, if you are only **displaying** prices and not actually collecting a payment from the customer (via PayPal, etc.), you may also want the booking engine to "skip" the payment confirmation step.
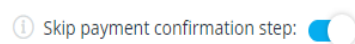
Custom feature – Approve booking: Because the "Accept payment" custom feature must be enabled (above), then the "Approve booking" feature must ***NOT*** be enabled. This custom feature is a means by which you need to "approve" any new bookings before they are confirmed. The gift card system does **not** allow customers to simply submit "requests".

Custom feature – Any employee selector: The Simplybook.me system was primarily developed to allow customers to book time slots with your employees (ideal for salons, where people book appointments with hairdressers, etc.). However, "tours" don't need to be booked in this manner. As such, the gift card platform does **not** ask customers to decide who they are booking the tour with (like which tour guide), and the gift card platform instead looks at the first available "service provider" (aka. Employee) and assigns the tour to that employee.


Note that for your own web site, if you use the SimplyBook.me booking engine / widget, if you don't want the customer to select which employee, you should also enable the following setting (click on Settings above).


Add-ons / Products for sale: The Simplybook.me system does *not* provide a means for the gift card platform to "book" any add-ons when creating bookings, so even if you have these functions enabled in your system, the gift card platform will not be able to take advantage of them.

<u>Final Check-Out</u>: As stated above, the Simplybook.me system does **not** allow a way for the gift card platform to record a payment, but does allow the creation of new bookings. If you have a cancellation policy defined, or you have terms and conditions defined, either/or both of these will be displayed to the customer, and the customer will need to acknowledge having read them (by clicking in a "check-box"), before completing their booking.

Custom feature – Cancellation policy: If enabled, the policy will be taken from the "Cancellation Policy text" information as part of the Cancellation Policy custom feature settings.
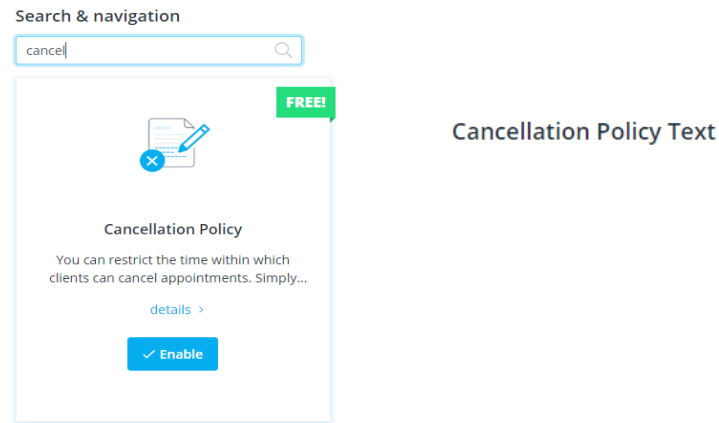
Custom feature – Terms and Conditions: If enabled, the terms and conditions will be retrieved from your settings.
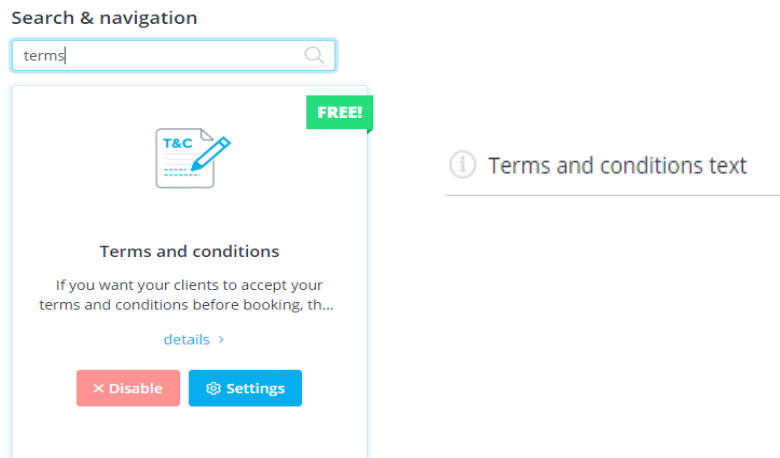
<u>Time-slots</u>: Note that if a given tour/product/service, is available more than once per day, the system will **only** display the **<u>first</u>** available time-slot for the date in question.

<u>Cancellations</u>: Note that in the Simplybook.me system, booking for multiple people **always** results in multiple appointments in the system, and they are consolidated in a **batch**. If you need to cancel the consolidated booking, be sure to select "Delete all batch appointments" on the pop-up screen, as shown below: