

Reservation System Test Drive

Introduction

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Here are a few helpful tips to help you navigate the Reservation System "Test Drive" feature of LetsDineOnline.

First of all, the info you enter is completely confidential and will not be used in any way by LDO. In fact, upon completion of the test process, you will be able to delete everything. Second, you must perform the test from a desktop or laptop computer, or a large-screen tablet. The full version of the dashboard cannot be rendered on a small, mobile device.

So, let's get started.

Entering a "Guest" Reservation

In this demonstration, you will be playing the role of both the establishment manager and the guest. This way you can view the process from both perspectives. With this in mind, we ask that you provide your email address and your cell phone number. These are used to effectively demonstrate the "notification" aspects of the system. Make sure you pick an email and a cell phone you have direct immediate access to while performing the test.

You will then be given the option to "Enter a Sample Reservation" or go directly to the "Reservations Dashboard". We recommend, for the sake of an effective demonstration, that you select "Continue – Go to The Reservations Dashboard".

Enter a Guest Reservation (As a Guest)

- Playing the role of a guest, select a reservation date. **NOTE:** please select the current date for a more effective demonstration.
- Next, select a reservation time.
- Now enter your personal details. We have prepopulated the email and text message fields with the credentials you provided at the beginning of the process.
- Make a selection from one of the "Special Needs" items and, if desired, enter a note for the restaurant staff. Click "Submit This Reservation"

A couple of things should have happened...

- You should have received two emails:
 - An email "to the restaurant staff" indicating a new reservation has been entered along with the details of the reservation.
 - An email "to the guest" confirming the details of the reservation request.

- You should have received one text message:

A text message "to the guest" confirming the details of the reservation request.

NOTE: You will have full control over which staff members receives notifications, if at all, and your guests will be able to decide whether or not they receive notifications.

Click the "Proceed to the Reservations Dashboard"

Okay, you've done it...

The reservation you entered, "as a guest" should now be showing at the top of the list. You'll also see a number of additional reservations, that we've taken the liberty of entering, to give you a real-world view of what your Reservations Screen will look like through actual daily use.

Using Your Reservation Dashboard

Great... fantastic!!! You've successfully entered a reservation from the perspective of your guests. Now, we will interact with the Reservation Dashboard. This is where you will do 99% of the work with incoming and upcoming reservations. Let's walk through all the features and procedures.

Manually Add a Reservation for the Current Date

1. From the Reservations Dashboard, click the "Add Reservation" button.

A blue rectangular button with rounded corners and the text "Add Reservation" in white.

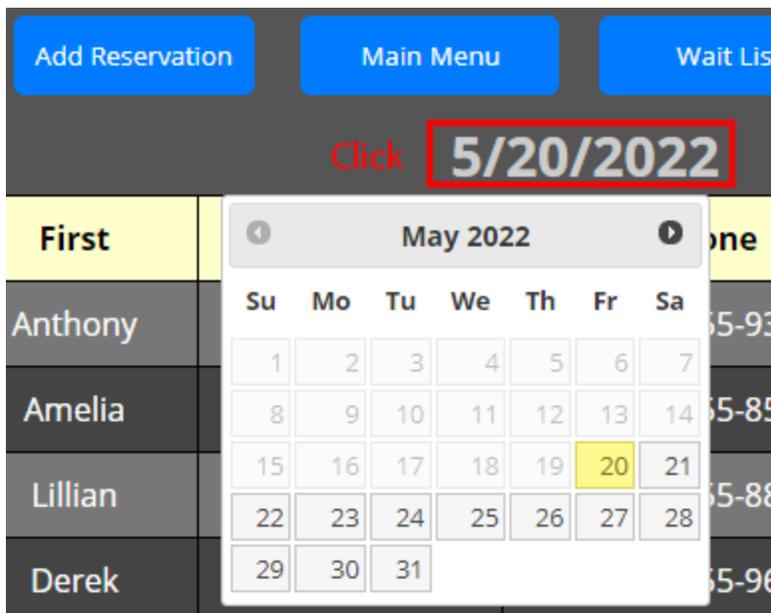
2. Select the requested time (only available times are shown).
3. Enter and/or select all relevant information for the guest, including "Number of Guests".
4. If required or requested, click on the appropriate "Yes" buttons if Wheelchair Access, Highchair or a Booster Seat is required.
5. If requested by the Guest, check the boxes for an email or text message status of the reservation.
NOTE: If the customer does not opt-in for email or text status messages, they will not receive any correspondence in regard to the status of their Reservation.
6. Enter any Special Requests or Notes (Optional).
7. Click the "Submit This Reservation" button.

A blue rectangular button with rounded corners and the text "Submit This Reservation" in white.

The Reservation is now added for the current date.

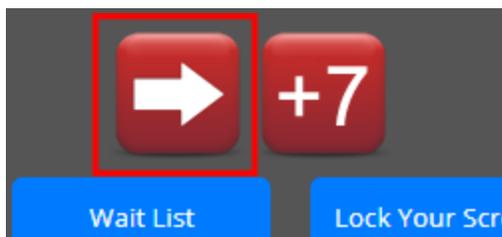
Manually Add a Reservation for a Future Date

1. From the Reservations Dashboard, click on the Current Date.



This will bring up a Pop-up calendar.

You can also move to a future date, day-by-day, by using the "Step Forward", (right-facing arrow) button.



2. Select a Future Date from the Calendar pop up.
(If needed, click on "Return to Today" to return to the current date.)
3. Click the "Add Reservation" button.



4. Select the requested time (only available times are shown).
5. Enter and/or select all relevant information for the guest, including "Number of Guests".
6. If required or requested, click on the appropriate "Yes" buttons if Wheelchair Access, Highchair or a Booster Seat is required.
7. If requested by the Guest, check the boxes for an email or text message status of the reservation.
NOTE: If the customer does not opt-in for email or text status messages, they will not receive any correspondence in regard to the status of their Reservation.
8. Enter any Special Requests or Notes (Optional).
9. Click the "Submit This Reservation" button.



The Reservation is now added for the future date.

Edit the details of an Existing Reservation for a Current or Future Date

Note: If you are editing the details for a Reservation on a Future Date:

- Click on the Current Date.
 - Select a Future Date from the Calendar pop up.
1. Find the Reservation you wish to edit in the list of Reservations shown.
 2. Select the "Gear" icon located in the far-right column.

Status	Edit
Arrived	
Arrived	

3. Edit and/or Select any information that has changed for the guest, including "Number of Guests".
4. When complete, click the "Edit Reservation" button.

Edit Reservation

The Reservation has now been edited and showing the new information.

Contact a Guest with an existing Reservation via text and/or email

Note: If you are contacting a guest in regard to a future Reservation:

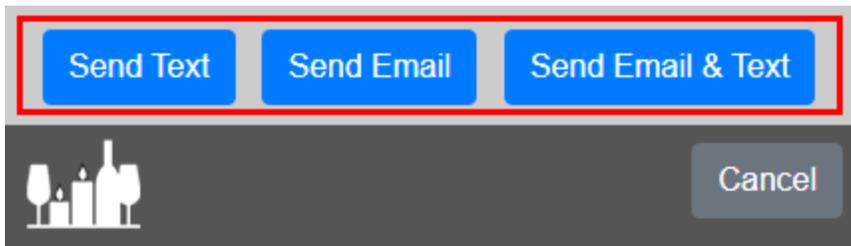
- Click on the Current Date.
 - Select a Future Date from the Calendar pop up.
 - See Steps 1 & 2 from "Manually Add a Reservation for a Future Date"
1. Find the Guest/Reservation you wish to contact in the list of Reservations shown.
 2. Click on the "Text/Email" cell in the "Send" column.

Send	Preferences
Text/Email	None
Text/Email	Yes

This will open the "Send Guest Message" window.

3. Enter the message intended for the guest.

4. Click "Send Text", "Send Email" or the "Send Email & Text" button to send the message.



NOTE: You will only be able to send a message (Text or Email) if the guest has previously opted-in to receive messages.

Viewing "Preferences" or special requests for each upcoming Reservation.

NOTE: Any Reservation entry that has Preferences entered such as Wheelchair Access, Highchair or Booster Seat requests or any kind of general request or note will be shown by the word "Yes" on a yellow background in the "Preferences" column.

Click the cell to view the Guest Preferences

	Send	Preferences	
	Text/Email	None	
	Text/Email	Yes	

Clicking on "Yes" will open the "Guest Preferences" window showing all special needs and/or requests for this reservation.

Hide/Show Seated Guests

To reduce screen clutter throughout the course of a business day, the Reservations and Waitlist screens are equipped with buttons to either "Hide Seated Guests" or to "Show Seated Guests". The buttons are located at the bottom of the screen and the use of these features are optional and at the discretion of the host/hostess.

Hide Seated Guests

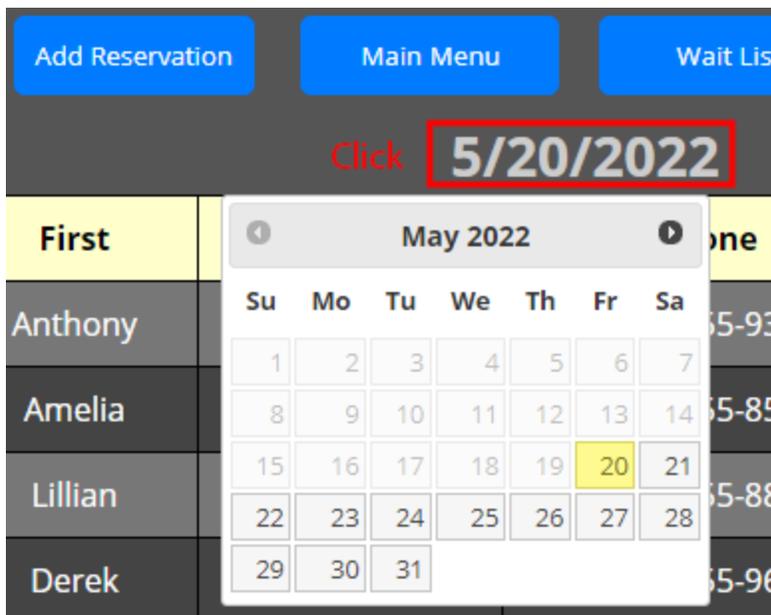
Show Seated Guests

The selection to "Hide Seated Guests" does not remove the Reservation or Waitlist entries from the system.

View Reservations for Future or Past Dates

You can view all of your future (or past) reservations by using one of the three methods shown below.

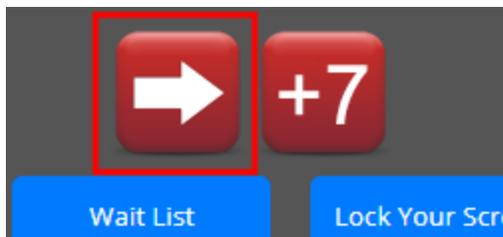
1. You can view reservations for a future date by clicking on the Current Date.



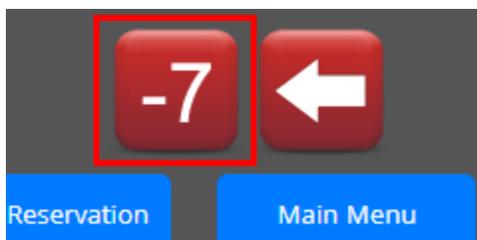
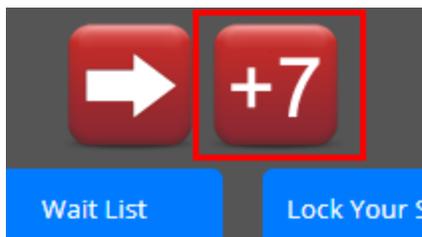
This will bring up a Popup calendar.

Select the date you wish to view (above only for viewing "future" dates).

2. You can move to a future or past date, day-by-day, by using the "Step Forward" (right-facing arrow) or "Step Backward", (left-facing arrow) buttons.



3. You can view an entire future week or past week, week-by-week, by using +7 or -7 buttons.



Managing/Processing The Status Of Each Reservation

Most Common Actions for Arriving Guests

1. Upon Guest Arrival, click the "Confirmed" cell for the Reservation that applies to the arriving guest.

Preferences	Status	Edit
None	Confirmed	
None	Confirmed	

2. Click the "Arrived" button (in the Popup window) to indicate that the guests has arrived and the Reservation is ready for a seating assignment (if applicable).



3. The "Status" column changes to "Arrived" on a yellow background.

Table	Status	Edit
12:47 PM	Arrived	

4. The "Time of Arrival" is temporarily shown in the "Table" column.
5. When the guest is ready to be seated, click the "Arrived" cell for the Reservation that applies to this guest.
6. Click the "Seated" button (in the Popup window) to indicate that the Reservation is now seated.



7. A "Table & Chairs" icon appears in the cell that applies to this Reservation.

Table	Status	Edit
	Seated	

8. Click the "Table & Chairs" icon... this will open a "Table Assignment" window
9. You may optionally click "Assign Table" for this Reservation or choose "No Assignment" if you are not seating according to a seating chart for your establishment.

If you wish to simply revert to and display the Arrival time for the guest, click the "Show Arrival Time" button.

NOTE: LetsDineOnline will be introducing an integrated Seating Chart. This will be a free upgrade for customers who choose this option.

The status of this reservation is now complete and its position in the list will move lower.

Other ways you can manage the Status of each Reservation

For customers who choose to manually review each Reservation request rather than Auto-Confirming.

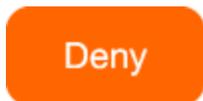
Each new Reservation request is placed into a "Pending" status. When clicking the "Pending" cell for a particular Reservation entry, the following options are available:

Preferences	Status	Edit
None	Pending	
None	Confirmed	

1. **Confirm** – Clicking this button Confirms the Reservation and sends a text message to the guest indicating that their Reservation is now confirmed.



2. **Deny** – Clicking this button Denys the Reservation and sends a text message to the guest indicating that their Reservation could not be confirmed. The Reservation remains in the list in case the opportunity to modify the status further should present itself.



3. **Cancel** – This would be selected if the guest (or the establishment) elected to completely cancel the Reservation. The Reservation remains in the list in case the opportunity to modify the status further should present itself.



4. **Waitlist** – (For customers subscribed to the LetsDineOnline Waitlist System) This allows a current "Pending" or "Confirmed" Reservation to be moved to the Waitlist System. This may be necessary when a guest has arrived late or, a portion of their party has not yet arrived or, the size of the guest count has changed.

NOTE: Moving a guest to the Waitlist places them into a 30-minute wait time hold (which can then be adjusted if needed) and would then need to be managed from the Waitlist Screen itself. The entry still remains in the Reservation screen list but will indicate that it has been moved to the "Waitlist"



5. **Delete** – Clicking this button will permanently delete and remove the Reservation entry from the list. This may be necessary if a Reservation was inadvertently entered twice or to remove Reservations

that are inactive to reduce screen clutter.

Delete

Managing the Status of a Confirmed Reservation

There are several options available for the management and status of Confirmed Reservations. When clicking the "Confirmed" cell for a particular Reservation entry, the following options are available:

Preferences	Status	Edit
None	Confirmed	
None	Confirmed	

1. **Cancel** – This would be selected if the guest (or the establishment) elected to completely cancel the Reservation. The Reservation remains in the list in case the opportunity to modify the status further should present itself.

Cancel

2. **Pending** – Clicking this button changes the status of a "Confirmed" Reservation to that of a "Pending" Reservation. This may be necessary if the guest (or your establishment) has a condition that may result in a significant change to the validity of the Reservation. The Reservation must be Reconfirmed to again be valid.

Pending

3. **Arrived** – Clicking this button indicates that a guest has arrived for their Reservation. Please review the "Most Common Actions for Arriving Guests" section of this tutorial for the proper processing of arriving guests.

Arrived

4. **Waitlist** – (For customers subscribed to the LetsDineOnline Waitlist System) This allows a current "Pending" or "Confirmed" Reservation to be moved to the Waitlist System. This may be necessary when a guest has arrived late or, a portion of their party has not yet arrived or, the size of the guest count has changed.

NOTE: Moving a guest to the Waitlist places them into a 30-minute wait time hold (which can then be adjusted if needed) and would then need to be managed from the Waitlist Screen itself. The entry still remains in the Reservation screen list but will indicate that it has been moved to the "Waitlist"

Wait List

5. **No Show** – This has 2 unique features:

- If a guest does not show for a Confirmed Reservation, clicking the "No Show" button simply indicates that particular status.
- If you have elected to "track" No Shows as part of your account setup, the system will keep track of guests who are consistent No Shows. You may have particular guests who are consistent No Shows. When the No Show count for a guest reaches your preset No Show "count" limit, we will alert you that the guest has reached their no-show limit when their next reservation gets entered. It's, of course, up to your staff to decide what actions are taken when this occurs.

A bright cyan rectangular button with rounded corners containing the text "No Show" in a bold, black, sans-serif font.

6. **Delete** – Clicking this button will permanently delete and remove the Reservation entry from the list.

This may be necessary if a Reservation was inadvertently entered twice or to remove Reservations that are inactive to reduce screen clutter.

A dark gray rectangular button with rounded corners containing the text "Delete" in a white, sans-serif font.

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