Bookings - 1.76.0 | 2.76.0

Release Date: Staging 5th November 2024 | Production 19th November 2024

Status: Released to Production

For detailed information on Bookings 1.76.0 (events) and 2.76.0 (tables) release please view a section below.

Summary New Features

[Events] - Booking Widget Analytics via Google Tag Manager - PPL-1230

This feature adds ability to track user actions in the Booking Widget.

We’re excited to announce that analytics will soon be available for our Booking Widget, using Google Tag Manager. This feature will allow customers to gather valuable insights about the widget performance and user interactions. To take advantage of this feature, customers will need a Google Tag Manager account and knowledge of Google Analytics or a similar analytics system like Microsoft Clarity.

We have completed the configuration of "events" on clickable actions against all buttons in the Booking Widget. While this has no impact on the Widget users, they will need to accept a cookie notice to allow us to collect said "events" data.

In its first release, 1.76, this will only be available for Zonal use. This will enable us to start gathering vital information and ensuring all the "events" are correctly configured. We aim to make this available to all customers in 2025.

The impact to customers in this release will be that on the widget there will now be a Cookie Notice for the user to accept or decline.

The cookie notice will be a "accept" or "decline" option and the wording on the Widget will read as follows:

OUR USE OF COOKIES

“We use essential cookies and similar technologies for technical purposes and, with your consent other cookies for other non-essential purposes as specified in the cookies policy. Use the “Accept” button to consent to the non-essential cookies. Use the “Reject” button to close this notice without accepting the non-essential cookies.”

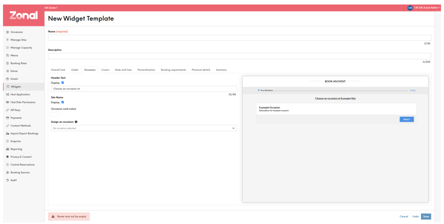
Due to testing we want to undertake on this feature to ensure it gathers information correctly, we will aim to release it for customer user in 2025.

[Events] - Booking Widget Customiser - Preview and site name on the Occasion tab - PPL-1288

This feature expands the usability of the customiser by adding a new preview screen.

To make our recent customiser even better we started a process of adding a preview screen to all of the tabs. We decided to start off with the Occasion tab where you will now be able to see the theme for your template applied. It will adjust dynamically as you apply changes in other tabs!

Moreover, you moved "Occasion card colour" to this tab from "Overall look", as that is the more natural space for it.



As mentioned, Occasion tab is the first one to receive such a preview as we have also added a new configuration to switch the name of the site OFF and ON!

[Events] - Host - Extras Refunds - PPL-1308

This feature expands the refunding functionality of Events to Extras.

As we are picking up steam for the upcoming Holidays season we made it easier for hosts to process refunds on Extras! Now, if a refund is needed, hosts can handle it directly, making the process smoother and quicker. Especially, when a single transaction covers multiple requirements, from now on when a transaction with Extras is refunded the monetary resources will be first deallocated from Extras, then pre-payment and lastly deposit. In other words, we're keeping the existing logic but expanding it to prioritise deallocation from Extras before pre-payment.

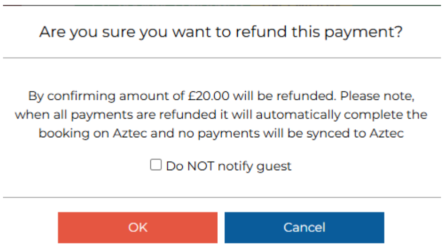
When an Extra payment is refunded the Chef Report will automatically update the status from "Paid" to "No".

[Events] - Host - Option to NOT send guest notification (email) when completing a refund - PPL-1305

This feature expands the refunding functionality of Events.

This feature provides hosts with the flexibility to issue refunds without triggering an automatic guest notification via "Payment Refunded" email. Thus, allowing for discreet booking adjustments while eliminating potential guest concerns. By giving hosts more control over communication, we hope to enhance the guest experience and empower hosts to manage bookings efficiently and thoughtfully.

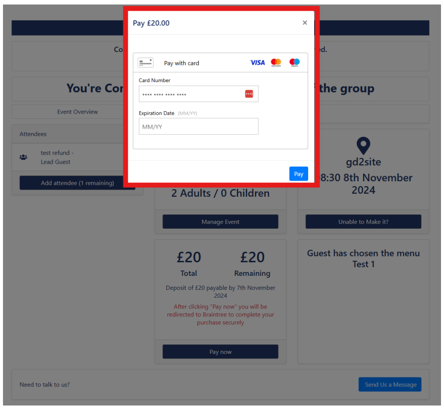
As you can see below, when a host goes to refund a payment they will now see a new tick-box "Do NOT notify guest". Once selected ("ticked"), it will stop "Payment Refunded" email from going out once a refund is complete:



[Events] - Guest Portal - Payment window closes when clicking anywhere on the screen - PPL-1304

This feature removes the ability to close the payment window by clicking outside of the window.

Previously, if a user clicked outside of the payment window (marked with red), the window would close and they would have to enter their payment details again:

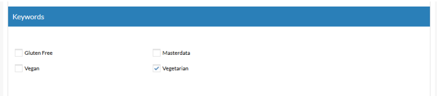


With this change we have now prevented this and the payment window can only be closed if the user clicks the X icon at the top right.

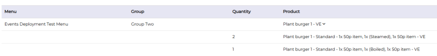
[Events] - Host - New Chef Report which includes 'keywords' from iOrder - PPL-1232

This feature displays acronyms for Vegan & Vegetarian items in the chef report.

We have made an enhancement to the Chef Report so that it now displays an acronym indicating if an item is vegetarian or vegan. In iOrder, you can add keywords to a product as seen here:



In the Chef Report we now look for products with either of the keywords Vegetarian (V) or Vegan (VE). We display the acronym at the end of the product on the report as seen here:



Menu	Group	Quantity	Product
Events Deployment Test Menu	Group Two		Plant burger 1 - VE
		2	Plant burger 1 - Standard - 1x 50p item, 1x (Steamed), 1x 50p item - VE
		1	Plant burger 1 - Standard - 1x 50p item, 1x (Boiled), 1x 50p item - VE

> **Please note, if an item is Vegetarian AND Vegan, we will only display the acronym for Vegan.**

[Events] - Admin - Pre-Order is Open Email Template Logic - PPL-1267

This feature enhances the communications capability of Events.

Admin users will now benefit from the reminder emails for guests who have made a new booking, to receive an email that pre-order is open. Even when the booking is made after the pre-order window has been opened! This enhancement aims to increase the number of completed pre-orders while reducing the need for hosts to follow up any unplaced pre-orders. With automated reminders, guests will have a gentle nudge to finalise their selections, making the process smoother for everyone involved.

Please see the below example of new logic for the "Pre-Order is Open" email template:

Scenario 1 - Lead Guest Only

- OLD LOGIC: John makes a booking on November 1st, but the pre-order already opened on September 30th - John doesn't receive an email about pre-order!
- NEW LOGIC: John makes a booking on November 1st, but the pre-order already opened on September 30th - John receives an email about pre-order being available

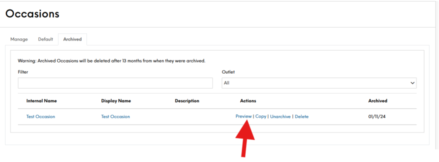
Scenario 2 - include Attendees

- OLD LOGIC: John makes a booking on November 1st, but the pre-order already opened on September 30th. John then adds his friends, Sue and Jane, in the Guest Portal - John doesn't receive an email about pre-order and neither does Sue or Jane
- NEW LOGIC: John makes a booking on November 1st, but the pre-order already opened on September 30th. John then adds his friends, Sue and Jane, in the Guest Portal - John receives an email about pre-order being available and so does Sue and Jane

[Events] - Estate Admin - Button to Preview Archived Menus/Occasions - PPL-1307

This feature introduces the ability to preview archived Occasion or Menu.

Previously, the only way to look at the settings in an archived Occasion or Menu was to copy the item and look through its configuration. With this new button we have made it more accessible and intuitive to view an archived Occasion or Menu settings. The button to preview an Occasion or Menu can be found in the actions column in the archived tab for Occasion or Menu and can be seen below:

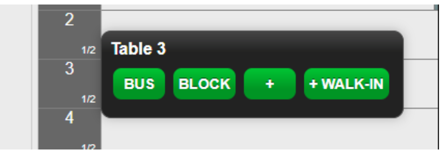


Estate Admins can also preview by selecting the Occasion or Menu name. In the preview screen the user will be able to view all of the settings like you would with any other Occasion or Menu, however when previewing the user won't be able to make any changes to the settings.

[Tables] - Host - Timeline View Enhancements - PPL-1293

This feature increases functionality to the timeline view in Tables Host.

This feature introduces many improvements to the timeline view to mirror the functionality in the table plan. Host can now add a walk-in straight from the timeline view:



If the table already has a booking assigned to it, Host can now update the status of the booking from this view:

These improvements enable the Host to make immediate actions from the timeline view and no longer have to navigate elsewhere for this.

Technical Changes

[Events] - Admin - Menu Pre-Order changes validation - PPL-1306

This feature ensures that an iOrder Menus get validated correctly.

To improve the Host experience, we've added an extra safeguard to our system for events with pre-order menus. Now, if a menu is open for pre-orders and has bookings tied to it, our system prevents accidental changes to that menu. This means your existing bookings menu choices stay secure, ensuring no pre-order selections are removed or changed unexpectedly.

Bookings - 1.75.0 | 2.75.0

Release Date: Staging 8 October 2024 | Production 22 October 2024

Status: Released to Production

For detailed information on Bookings 1.75.0 (events) and 2.75.0 (tables) release please view a section below.

Summary New Features

[Events] - Events Widget (booking form) - greater functionality for Admin user to configure booking journey - PPL-1257

This feature expands the functionality for the Admin user when configuring their booking journey on the Events Widget.

Here are the following changes that have been made with this feature:

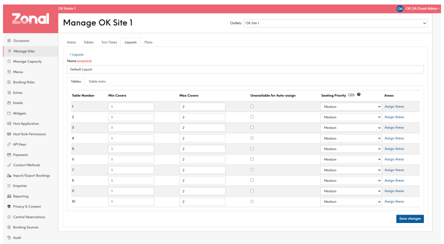
1. [Events] - Booking Widget - Date selector to default to first available date / timeslot - This change means that when you select an occasion in the booking widget, the date selector will take you to the first day available for the occasion rather than today's date. So if I select a Christmas Occasion, and there was a Schedule on the Occasion which indicated it starts on the 1st of December. When the guest selects the Occasion, it would take them to 1st December instead of today's date.
2. [Events] - Booking Widget Customiser - copy template functionality - This change allows the Admin to copy a template for the widget Customiser and easily create a new one using all the settings from the copied template. This will speed up the creation of new templates as well as easily keep all your brand settings and colours.
3. [Events] - Booking Widget - get rid of the word "estimated". This change removes "Estimated" from "Estimated Costs" on the final steps of the booking process.

[Events] - Priority Tables - PPL-978 (** Please note this feature has been in Staging for 1.74 Release and will go into Production for 1.75)

This feature enhances the tables shuffle and assignment algorithms by adding a customisable priority configurations.

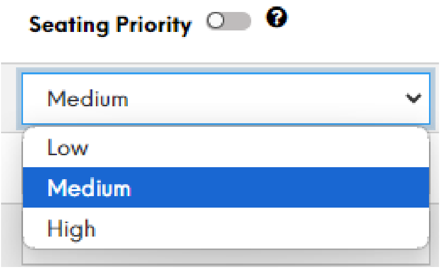
As a booking system, our primary goal is to optimize capacity utilization. We achieve this using our Table assignment and shuffle algorithms that calculate the best fitting table for any booking. However, they lacked the personal touch of people who know their sites best. The new feature facilitates table assignment according to customer preferences, ensuring an efficient allocation that meets their needs by allowing users to assign a priority level to each table and table join on a per layout basis.

To find the configuration page, users will need to go to "Manage Sites" tab, in the upper right corner choose a site they want to configure, then open (or create) any layout in the "Layouts" sub-tab. There users will see a new column "Seating Priority":



Here users can toggle the priority configuration ON and OFF using the toggle next to the priority column

For each table and each table join users can select 1 of 3 priority level - Low, Medium and High:



Please note, you can still configure the priority of tables when the configuration is turned off - Tables will only apply the priorities once you switch it on.

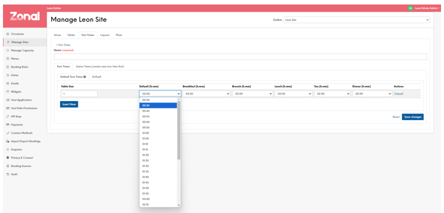
Once you've configured priorities for your tables and table joins, click on the seating priority toggle to turn it on and save changes. Tables will now apply the priorities whenever you're using assignment and shuffle functionalities.

[Events & Tables] - Flexible Incremental Time Slots for Increased Capacity - PPL-1263

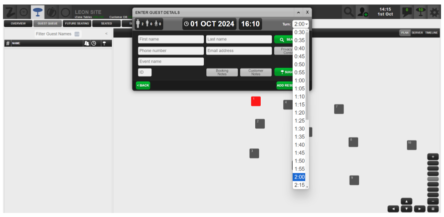
This feature expands the options for desired turn times in tables and events and assist in maximising capacity.

In Tables and Events we have introduced the ability to configure timeslots in increments of 5 minutes with the aim to allow customers to further increase their capacity. The changes can be applied below in Events and Tables:

Events - Admin - Manage Sites - Turn Times



Tables - Manage Booking - Turn Times



The 5 minute increments are from 30 minutes up to 2 hours

In order to fully maximise your capacity, to fully benefit from the feature you will need to make sure your time slots complement the turn time increments. For example if your time slots are every 15 mins, 19:30 - 19:45. If you change a booking to leave at 19:40, then you will have a 5 min gap between the next booking. Should you have had a 19:40 time slot, you could take a booking 5 mins earlier.

Zonal

[Events] - Occasion and Menu - Archive and Deleting (including auto archive) - PPL-1252

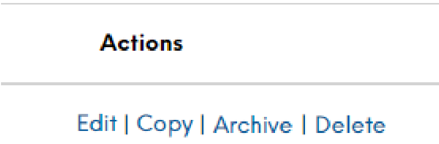
This feature enhances the managing of Occasions and Menus by introducing the ability to Archive.

To improve the management of Occasions and Menus, We have introduced the ability to Archive them.

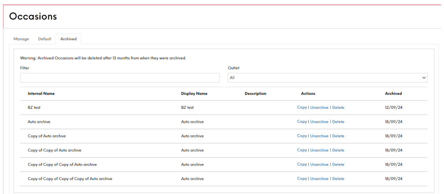
For the Host user, once an Occasion / Menu has been Archived, it will be hidden from the booking journey / creating a booking. This will ensure the host is always presented with 'active' Occasions / Menus.

For the Admin user, this change greatly enhances the managing of occasions / menus. As the Admin user will be presented with the currect 'Active' Occasions / Menus and be able to navigate to the Archived items. This will have a impact on the time it takes for the items to load and make them easier to find.

The option to archive will be in the actions tab for occasions and menus as shown below:



To manage Archived Occasions / Menus, we have added a new page to display them which can be found here:

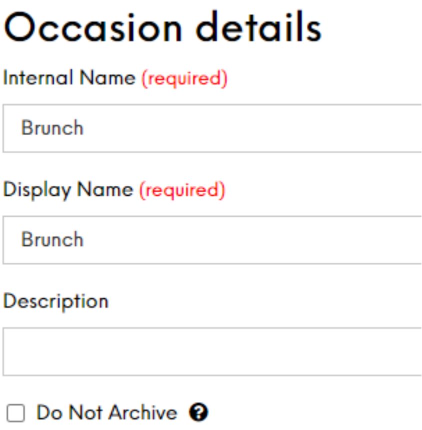


You can unarchive from this page and check when this occasion / menu was archived.

> **Occasions / Menus must have no active bookings attached to them or else they cant be archived. Any occasion / menu archived for 13 months will be automatically deleted.**

To further benefit the Admin user, there is the ability for an occasion / menus to be automatically archived. We have tied this into the scheduler, so once the scheduled date OR recurs until date has passed, then the occasion / menu will be automatically archived.

If there is an occasion / menu that you may wish to never be archived regardless of it's schedule, there is also the option to set the occasion / menu as "Do Not Archive":



This will prevent the occasion / menu from being manually or automatically archived.

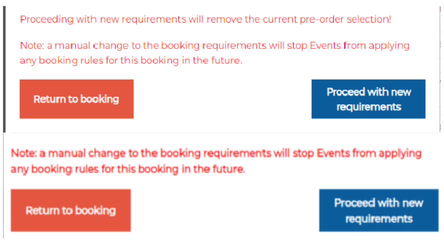
> **Please note all Occasions and Menus will be archived the day AFTER release, when viewing this feature on the release date you wont see the items in the Archive folder.**

[Events & Tables] - Host - Warning Message in Bold - PPL-1298

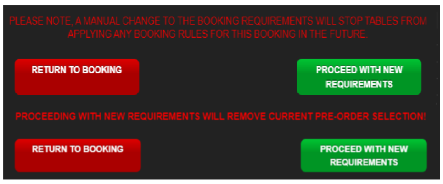
This feature will aim to make the warning message to host much clearer by putting it in bold writing.

In Tables and Events we have introduced improved the visibility of the warning message to make it even clearer to hosts about potential impact of changes to the booking.

Events Host - previous and now (please ignore message, this is for illustration only)



Tables Host - previous and now (please ignore message, this is for illustration only)



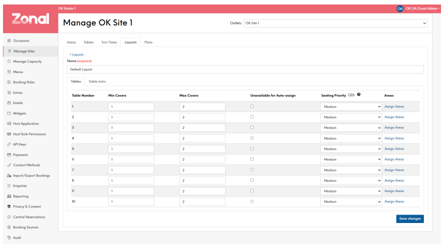
> **Please note there were no changes to the logic, this was only a change to what the Host can see**

[Events] - Priority Tables - PPL-978

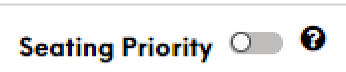
This feature enhances the tables shuffle and assignment algorithms by adding a customisable priority configurations.

As a booking system, our primary goal is to optimize capacity utilization. We achieve this using our Table assignment and shuffle algorithms that calculate the best fitting table for any booking. However, they lacked the personal touch of people who know their sites best. The new feature facilitates table assignment according to customer preferences, ensuring an efficient allocation that meets their needs by allowing users to assign a priority level to each table and table join on a per layout basis.

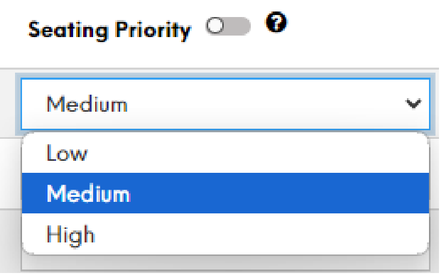
To find the configuration page, users will need to go to "Manage Sites" tab, in the upper right corner choose a site they want to configure, then open (or create) any layout in the "Layouts" sub-tab. There users will see a new column "Seating Priority":



Here users can toggle the priority configuration ON and OFF using the toggle next to the priority column



For each table and each table join users can select 1 of 3 priority level - Low, Medium and High:



> **Please note, you can still configure the priority of tables when the configuration is turned off - Tables will only apply the priorities once you switch it on.**

Once you've configured priorities for your tables and table joins, click on the seating priority toggle to turn it on and save changes. Tables will now apply the priorities whenever you're using assignment and shuffle functionalities.

> **Worth noting, when a Host manually creates a new booking it will be assigned to a best fit table without taking priorities into consideration. Priority is utilised only when a booking is created via the Booking Widget / EAPI, or when a Host manually shuffles the tables.**

[Tables] - Host - Improved "No-Show" Validation - PPL-1287

This feature improves functionality by displaying No Show button at relevant times.

This change will ensure the "No Show" button will only show once the bookings arrival time has passed. This will prevent the host from marking a booking a "No Show" prior to arrival time.

> **The "No Show" feature is designed to capture customers who did not turn up for their booking. If the host was to know prior to arrival, it would not be a "No Show" but instead should be a cancellation**

[Events] - Improved Booking Rule Validation, Attendee Pre-Order Updated - PPL-1258

This feature improves booking rule validation and a new email template to include attendees when pre-order is changed.

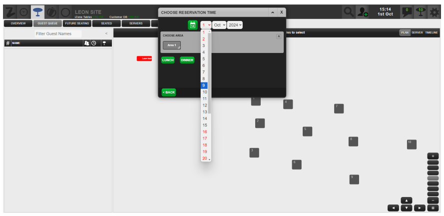
Here are the following changes that have been made with this feature:

1. [Events] - Estate Admin - Pre-order updated template to include attendees when pre-order updated. This change now includes the attendee when a pre-order is updated as previously only the lead guest would receive the email.
2. [Events] - Estate Admin - Do not allow pre-payment to be required before pre-order date. This change now prevents the user from saving the booking rule where the pre-payment is required before pre-order.

[Tables] - Host - Occasion Selection Validation - PPL-1190

This feature improves clarity over valid / invalid dates for occasions in tables host.

Following on from the feature being introduced in 1.74, Host Occasion Validation, we have added additional value for the host. In Tables, with Bookable Areas active, we will now show what dates are valid / invalid for that occasion in the date selector:



This change gives the host more clarity over what dates are valid when making any possible changes to a booking and saves the host having to go back and forward when making those changes. Invalid dates will be shown in red.

[Events] - Events Widget (Booking Form) Improved Site Selection - PPL-1202

This feature improves clarity for the Guest when selecting a site on the Booking Widget.

As we continue the Events Widget (Booking Form). We have now improved the way in which we present the Site information back to the guest making the booking. This will assist in ensuring the correct site is selected and the guest having additional information regarding the site.

This will be very beneficial for scenarios where there are very similar site names, but are in different locations.

To enable this feature, please navigate to the Widget Customiser in Events Admin. Select the widget you wish to enable this for, on the main tab (Overall Look) you will see the option (tick box) to enable this. (Display site address in breadcrumbs)

Technical Changes

[Events] - Security Enhancement when using Card Guarantee and Braintree (3DS) - PPL1276

This feature introduces security enhancements to the 3D Secure (3DS) challenge to the Braintree Card Guarantee.

To enhance payment security, we will introduce the 3D Secure (3DS) challenge to the Braintree Card Guarantee. (this is already in place for making a normal payment). Customer using Braintree will benefit from ensuring that the payment journey for card guarantee is both successful and secure. This will ensure that not only are payments processed smoothly, but they are also safeguarded against fraud, providing trust and confidence to the users

Bookings - 1.74.0 | 2.74.0

Release Date: Staging 10 September 2024 | Production 1 October 2024

Status: Released to Production

For detailed information on Bookings 1.74.0 (events) and 2.74.0 (tables) release please view a section below.

Summary New Features

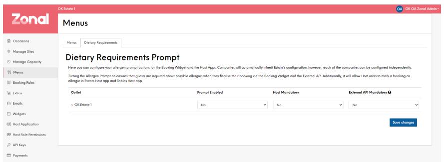
[Events] - As a customer, I would like to capture if a booking has got an allergen requirement as part of the Booking Journey - PPL-1228

This feature introduces the ability to collect guests' dietary requirements information.

In this release we are introducing a more streamlined ability to collect guests' dietary requirements when making a reservation. This addition has the potential to ensure that every guest's dining experience is safe, while the Hosts will have the ability to prepare in advance for special dietary needs, reducing the wait times for food preparation, and minimizing food waste. Ultimately, we hope that this feature will enhance the efficiency of the kitchen operations and will elevate the customer service experience.

1. Setup and configuration

Firstly, users will need to configure the availability of the dietary requirements prompt in Events Estate Admin "Menus" sub-tab "Dietary Requirements"

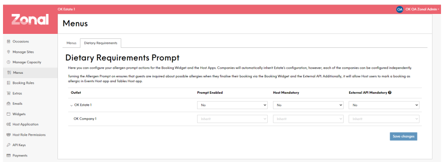


Here users can configure settings for the prompt:

- Prompt Enabled - Yes / No - Controls the prompt functionality, when set to "No", the dietary requirements prompt will not appear in Host apps or the Booking Widget. Please note that when enabled, Booking Widget users will be required to provide the dietary requirements information before finalising the booking.
- Host Mandatory - Yes / No - Controls whether the Host (both Events & Tables) has to provide dietary requirements information before finalising the booking.

- External API Mandatory - Yes / No - Controls whether dietary requirements information is mandatory for API booking journeys. Please note that if Dietary Requirements are required by External API and missing from request, it will fail and the booking won't be created.

As for any such settings, users can configure it on an Estate or Company basis. By default companies will inherit the configuration from the Estate:

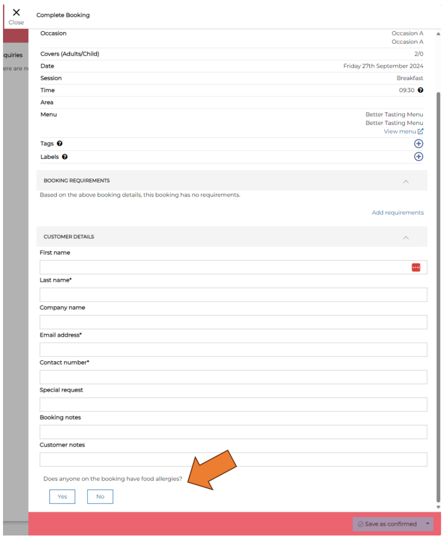


> **Please note - all of those settings will be set to "No" for the Estate and "Inherit" for the Companies on release.**

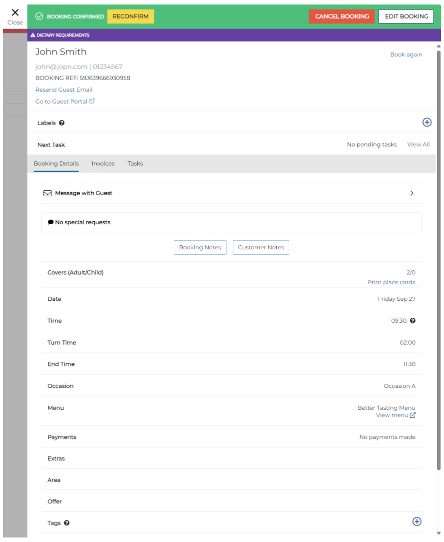
<u>2. Host apps</u>

A. Events Host app

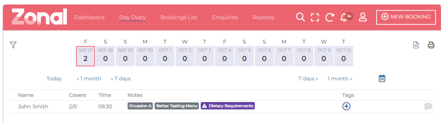
When the dietary requirements prompt has been enabled, Events Host users will have the ability to add dietary information to any booking via a prompt on the customer details of the booking:



Once a booking has been marked as having dietary requirements a purple notification will appear on the Booking Details:

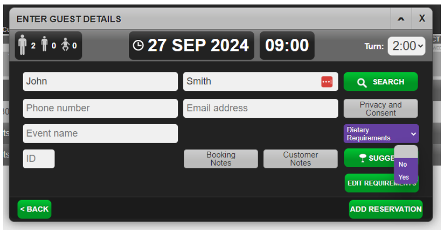


It will also appear on the Day Diary for the booking in form of a pill:

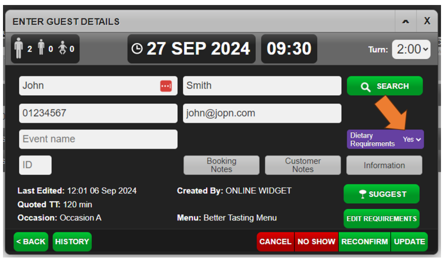


B. Tables Host app

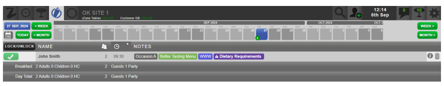
When the dietary requirements prompt has been enabled, Tables Host users will have the ability to add dietary information to any booking via a prompt on the customer details of the booking:



Once a booking has been marked as having dietary requirements it will appear on the Booking Details as "Yes":



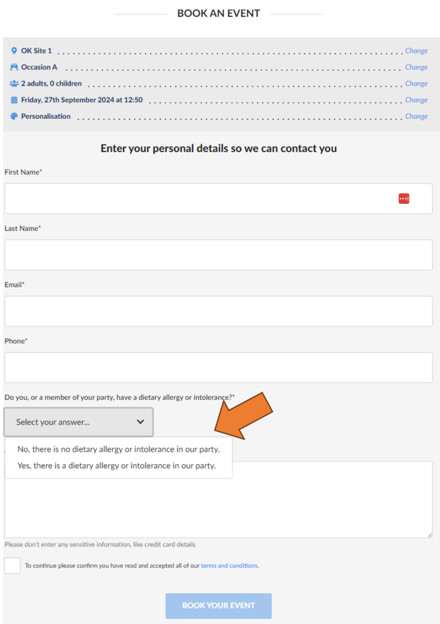
It will also appear on the Reservations view for the booking in form of a pill:



Please note - even if Host Mandatory configuration is set to "Yes", on editing any booking Hosts will not be required to provide dietary requirements information.

3. Booking Widget

When the dietary requirements prompt has been enabled, Booking Widget users will have the ability to add dietary information to any booking via a dropdown prompt on the personal details page:

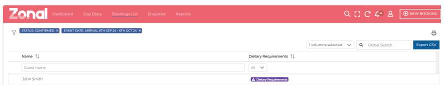


4. Reporting

To ensure that nothing goes unnoticed we've added multiple reporting channels for the dietary requirements.

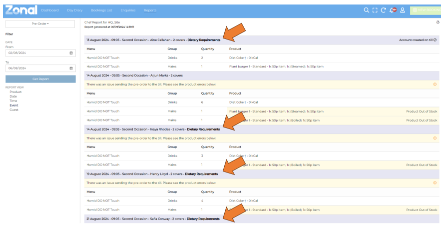
A. Booking List:

A new selectable column "Dietary requirements" has been added. when a booking is marked as having dietary requirements, the same purple icon will appear in said column:



B. Chef report

Dietary requirements for bookings with pre-order will appear in bold text on the Event view:



C. Tables Nightly Extract

Tables Nightly extras will now have a new column to the Nightly Extract called "dietary_requirements" with statuses:

- "Y" - for when the booking was marked as having dietary requirements
- "N" - for when the booking was NOT marked as having dietary requirements
- Empty if the information was not provided (selection wasn't mandatory)

[Events] - As a Bookings Customer, I would like to enable and use Freedom Pay as a payment provider in Events - PPL-1207

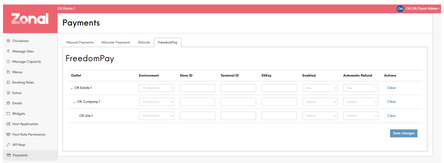
This feature introduces a new payment provider - FreedomPay - for the Bookings platform.

As part of expanding our offering we provide a new integration with a payment provider - FreedomPay. To enable that please contact your account manager, as you will need to obtain certification from FreedomPay.

Once this has been enabled you will be able to enabled FreedomPay provider by going to Events Estate Admin > Payments tab > FreedomPay. There you will see the below input fields:

- Environment
  - SandBox
  - Production
- ESKey
- Store ID
- Terminal ID
- Enabled
  - Yes
  - No
- Automatic Refund

- Yes
- No



You will be able to utilise FreedomPay once those have been correctly filled out as per you FreedomPay configuration. The standard inherit structure will allow you to configure different setups for your Estate, Companies and Sites. Please note that by default Companies and Sites will inherit the Estate setup.

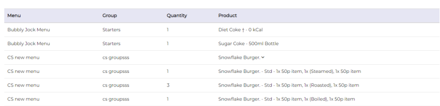
> **All current payments features, such as deposit, pre-payment, card guarantee etc. will automatically be available with FreedomPay.**

[Events] - New Chef Report - Ability to hide modifiers - PPL-1227

This feature groups products together now if they have different modifiers.

To enhance Chef Report usability we have made a change so that it is more condensed and groups items even if they have different modifiers. Before this change the chef report would display the product separately if it had different modifiers selected. For example, If there were 3 steaks all with different modifiers (Well done, medium rare etc.) it would display the steaks separately instead of simply a total 3 steaks. With this change the steaks will now be grouped together and the modifiers can be viewed by selecting the drop down:

Here is an image showing the dropdown selected displaying the different modifiers:



[Events] - Events Booking Widget (Booking Form) - minor enhancements and improvements - PPL-1265

This feature brings updates to the Booking Widget customiser.

We are back with multiple smaller updates to the Booking Widget customiser:

1. Don't show referral source if there is only 1 added

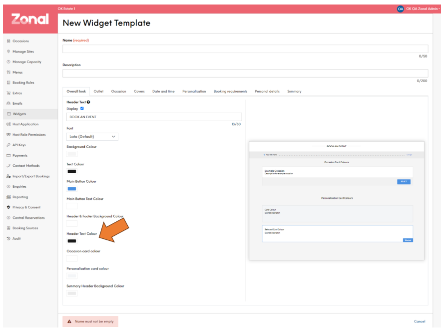
This change follows our trend of intuitive behaviour for the widget and ensures that the referral source shows to the Guest user only when:

1. Booking Sources > Enable Referral Sources = ON
    - and multiple sources are added
2. Widgets > Widget Customiser > Widget template > Personal details > Display Referral Sources = ON
    - and more than 1 source has been assigned to the template

In any other case the Booking Widget will not be displaying referral sources at all, as there is no action to be taken by the Guest user.

2. Header text colour

This change introduces a new customisable setting "Header Text Colour" to the Booking Widget customiser:



Please note - by default the colour for "Header Text Colour" will be the same as the "Text Colour"

3. Booking reference to use header text colour

This change ensures that we are maximising the utilitsation of the available customisation. Booking Reference font colour follows the config from "Header Text Colour".

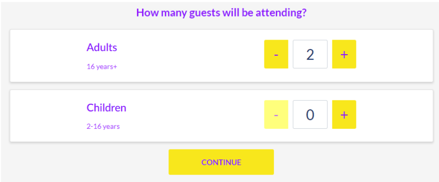
This will from now apply to "Booking Successful" and "BOOKING REFERENCE on the booking confirmation page.

4. Date selector date formatting

From now on the date on the Date & Availability selectors will fall in line with the rest of the widget and use the format of "Day of the week, DDth Month YYYY".

5. Quantity buttons to use configured colours

With this change the quantity buttons (Covers & Extras) follow the colour are configured in "Main Button Colour", while the text for them follows the colour configured in "Main Button Text Colour".



[Events] - Priority Tables - PPL-978 (** Please note this feature will be in Staging for 1.74 Release and put into Production for 1.75 - this will allow additional time for customer to test the feature)

This feature enhances the tables shuffle and assignment algorithms by adding a customisable priority configurations.

As a booking system, our primary goal is to optimize capacity utilization. We achieve this using our Table assignment and shuffle algorithms that calculate the best fitting table for any booking. However, they lacked the personal touch of people who know their sites best. The new feature facilitates table assignment according to customer preferences, ensuring an efficient allocation that meets their needs by allowing users to assign a priority level to each table and table join on a per layout basis.

To find the configuration page, users will need to go to "Manage Sites" tab, in the upper right corner choose a site they want to configure, then open (or create) any layout in the "Layouts" sub-tab. There users will see a new column "Seating Priority":

Here users can toggle the priority configuration ON and OFF using the toggle next to the priority column .

For each table and each table join users can select 1 of 3 priority level - Low, Medium and High:

> **Please note, you can still configure the priority of tables when the configuration is turned off - Tables will only apply the priorities once you switch it on.**

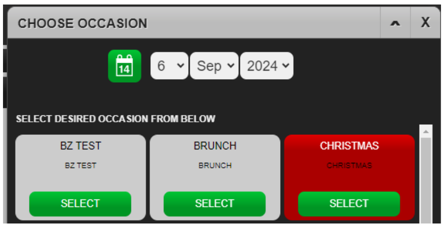
Once you've configured priorities for your tables and table joins, click on the seating priority toggle to turn it on and save changes. Tables will now apply the priorities whenever you're using assignment and shuffle functionalities.

> Worth noting, when a Host manually creates a new booking it will be assigned to a best fit table without taking priorities into consideration. Priority is utilised only when a booking is created via the Booking Widget / EAPI, or when a Host manually shuffles the tables.

[Tables] - Host Booking Journey Enhancement - Occasion Selection on Creating a Booking - PPL-1262

This feature enhances the booking journey on tables host with Bookable Area's enabled.

We have adjusted the booking journey for the Tables Host app when Bookable Areas is enabled, so that from now on it will consider the scheduler when selecting an Occasion. Previously on the Occasion selection screen, all Occasions would appear as valid, regardless of the date for which you wished to create a booking. This would create issues for Hosts creating bookings for future dates, especially around Christmas time. This change now correctly displays valid and invalid occasions when creating a booking for a specific date.



Technical Changes

Pre-Order Support Issues - PPL-1256

This feature introduces technical changes to our system in order to ensure smooth operations.

As part of each release we have made some technical changes to ensure that our platform remains up to date. Please see the summary below.

Firstly, we limited the amount of price check calls in the Guest Portal to 1 every 180 seconds to lower the strain on our infrastructure and secure continuous operation of the pre-order functionality.

Previously, with the Events Retry mechanism would retry the call to pre-order indefinitely until the booking date & time. However, due to errors from Pre-order that meant the sync would never be successful, possibly breaking the functionality. From now on, when we receive any of the mentioned error messages from pre-order, we will instead keep a count and when that exceeds the configured retry attempts we will stop retrying that message to safeguard our infrastructure.

Bookings - 1.73.0 | 2.73.0

Release Date: Staging 13 August 2024 | Production 3 September 2024

Status: Released to Production

For detailed information on Bookings 1.73.0 (events) and 2.73.0 (tables) release please view a section below.

Summary New Features

[Events] - Pre-Order Update Enhancements - PPL-1253

This feature makes changes to Pre-Orders even easier to manage.

As we work towards easier management of pre-order within Events, in this release we've enhanced functionality around notifying users of changes to their pre-order.

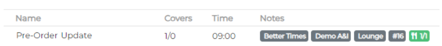
In release 1.71 we introduced the functionality that enabled us to email the booking organiser in case there was a change to a Menu item, please see the summary below:

" (...) Updating the menu, for any reason, e.g. product was superseded by another one due to supply issues, new item needs to be added (was missed in error), a cosmetic change to the product (meta data) forced all guests to reselect their orders.

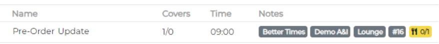
(...) To make the pre-order journey easier for all parties involved (...) from this release onwards, Events will consume the information from iOrder on changes to already open menus. This will allow customers using iOrder will be able to update the menu and send said update to their guests who are using this menu without removing the entire pre-order. Guests who may be affected by a change, will be notified to take action and update their selection. (...)"

With a goal of making this feature more precise, from this release onwards, the Lead Guest will be notified only if their, or other Attendees', selection has been affected by a change. In other words, when an item that wasn't selected by anyone at the party is edited, the Lead Guest will not be notified.

Additionally, when the worst comes to be, and a site is forced to remove an item from an open pre-order, Events & Tables will now update the pre-order completion pill. To make it more tangible, imagine a scenario where a booking has made their pre-order selections and Events & Tables marked as it completed



Then, if in iOrder menu is updated to delete the selected product, Pre-order will turn the completion status back to open, while Events & Tables host app pre-order icon turns yellow:



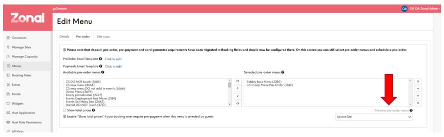
Please note - at the moment, only the Lead Guest on the booking will receive an update email.

[Events] - Events Admin to be able to view Pre-Order menu prior to publishing - PPL-1237

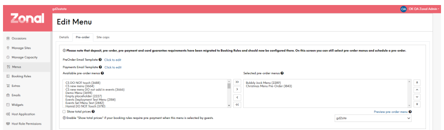
This feature enhances the ability to sense check Pre-Order menus in Events.

As we are working to make the Pre-Order process as seamless as possible, we added the ability for the Events Estate admin to preview the iOrder menu directly within Events. We hope that this will be users' last stage of sanity checking ahead of publishing the Menu for guest users.

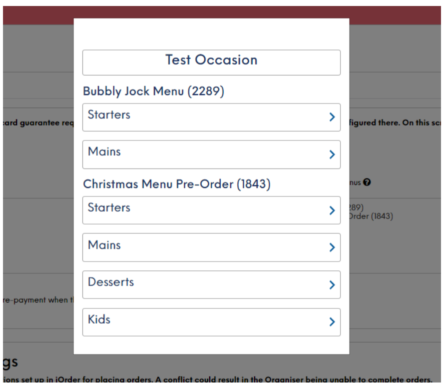
This new functionality can be found in Events Estate Admin > Menus > *Menu configuration* > Pre-order:



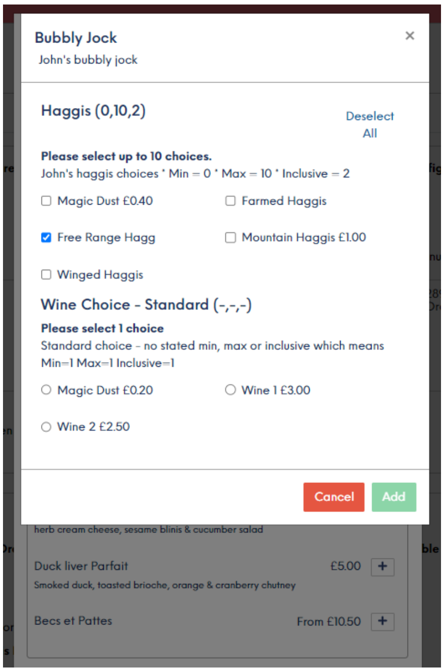
Admin user will then need to select a site, this is because pricing in iOrder is configured per site. Once done, user will be able to see that the button "Preview pre-order menu" has changed to blue, indicating that it can be interacted with:



Once user clicks on the button "Preview pre-order menu", they will see a pop-out with Menu stylised so that it matches the Guest Portal Pre-order tab.



Here users can see pricing of each item, as well as, all customisable modifiers associated with it:



Technical Changes

[Events] - Estate Admin - Only do Pre-order calls when we go onto pre-order subtab PPL-1238-1

This feature improves Events' performance.

As part of improvements for the pre-order functionality, we looked at improving Events' performance. With this change we will limit the amount of external calls Events has to make in order to load pre-order menus.

From now on, we will only call pre-order when user opens the pre-order sub-tab within a Menu, instead of re-calling pre-order whenever user switches any of the Menus sub-tabs.

[Events] - Events to Pre-order - Retried Error - "can only be cancelled when in an Open state" - PPL-1238-5

This feature improves Events' performance.

To ensure we don't bombard Pre-order with calls when it's in either of 2 statuses "SendToPOSError" or "SendToIOrderGatewayError", we've introduced additional checks so that we no longer retry indefinitely until the booking date/time.

1. "SendToPOSError" - happens when an order was sent to the Till via iOrder Gateway (IGW) and failed for some reason e.g. item out of stock.
2. "SendToIOrderGatewayError" can happen in 3 scenarios:
    - If comms from PreOrder to iOrder Gateway fails for a long period of time
    - The rollover time config for estate was set up incorrectly e.g. 11.45 AM which means order will never be sent to Till if EventTime is after 11.45am.
    - A Pre-order was created but NO Selections were ever made, so when the Event Time has passed we set "SendToIOrderGatewayError" status in pre-order

Bookings - 1.72.0 | 2.72.0

Release Date: Staging 15 July 2024 | Production 6 August 2024

Status: Released to Production

For detailed information on Bookings 1.72.0 (events) and 2.72.0 (tables) release please view a section below.

Summary New Features

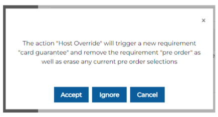
[Events] & [Tables] - Host - Messaging to Hosts / Validation checks when changing requirements or items on an existing Booking - PPL-1224

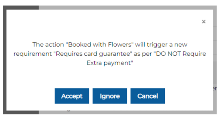
This feature introduces a new way of notifying the Host about changes to the booking requirements.

As part of clarity and quality of life changes we've had a look at the way we inform the Host users about changes to requirements on any booking they edit. We hope that this will reduce the human error and increase clarity of the system overall.

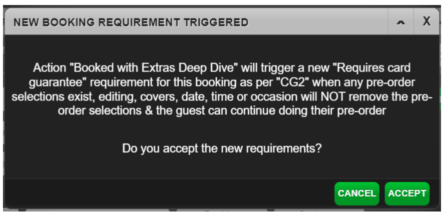
The previous pop-out had very little information, as it only informed the user that a requirement has been manually overridden or that booking rule change has occurred:

Events:





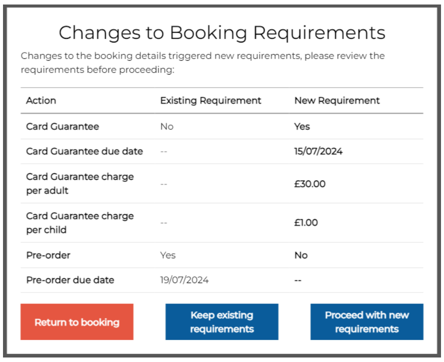
Tables:



With our new pop-out, users will be able to clearly see which requirements have been changed and the differences between them:

Events:

Zonal



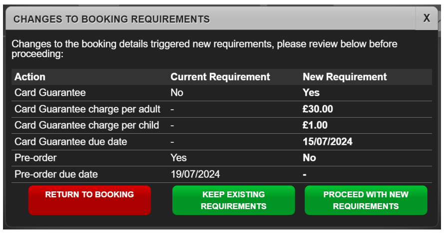
Changes to Booking Requirements

Changes to the booking details triggered new requirements, please review the requirements before proceeding:

Action	Existing Requirement	New Requirement
Card Guarantee	No	Yes
Card Guarantee due date	--	15/07/2024
Card Guarantee charge per adult	--	£30.00
Card Guarantee charge per child	--	£1.00
Pre-order	Yes	No
Pre-order due date	19/07/2024	--

Return to booking | Keep existing requirements | Proceed with new requirements

Tables:



CHANGES TO BOOKING REQUIREMENTS X

Changes to the booking details triggered new requirements, please review below before proceeding:

Action	Current Requirement	New Requirement
Card Guarantee	No	Yes
Card Guarantee charge per adult	-	£30.00
Card Guarantee charge per child	-	£1.00
Card Guarantee due date	-	15/07/2024
Pre-order	Yes	No
Pre-order due date	19/07/2024	-

RETURN TO BOOKING | KEEP EXISTING REQUIREMENTS | PROCEED WITH NEW REQUIREMENTS

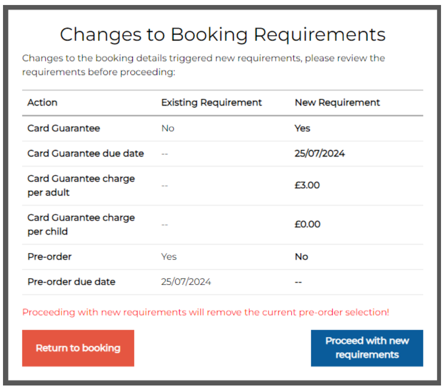
The new buttons follow the functionality of their predecessors, however, their position and colours have been adjusted to make them more intuitive:

- Return to booking - returns user to the booking edit screen
- Keep existing requirements - keeps existing requirements and finalises the booking. Please note - this button will appear only if the requirements have not been interacted with.
- Proceed with new requirements - applies new requirements to the booking and finalises the editing

Additionally, when a pre-order has already been placed we will now show a warning to the Host, to ensure pre-orders are not accidentally deleted:

Events:

(a) Pre-order requirement removed:



Changes to Booking Requirements

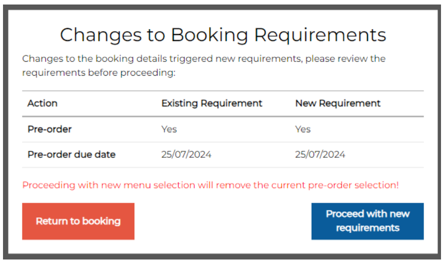
Changes to the booking details triggered new requirements, please review the requirements before proceeding:

Action	Existing Requirement	New Requirement
Card Guarantee	No	Yes
Card Guarantee due date	--	25/07/2024
Card Guarantee charge per adult	--	£3.00
Card Guarantee charge per child	--	£0.00
Pre-order	Yes	No
Pre-order due date	25/07/2024	--

Proceeding with new requirements will remove the current pre-order selection!

Return to booking | Proceed with new requirements

(b) Menu changed:



Changes to Booking Requirements

Changes to the booking details triggered new requirements, please review the requirements before proceeding:

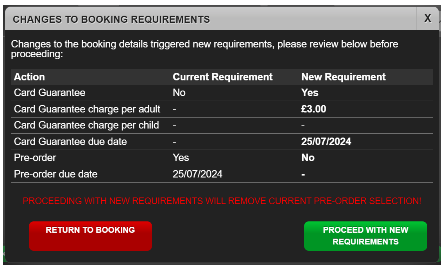
Action	Existing Requirement	New Requirement
Pre-order	Yes	Yes
Pre-order due date	25/07/2024	25/07/2024

Proceeding with new menu selection will remove the current pre-order selection!

Return to booking | Proceed with new requirements

Tables:

(a) Pre-order requirement removed:



CHANGES TO BOOKING REQUIREMENTS X

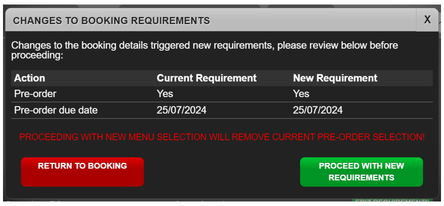
Changes to the booking details triggered new requirements, please review below before proceeding:

Action	Current Requirement	New Requirement
Card Guarantee	No	Yes
Card Guarantee charge per adult	-	£3.00
Card Guarantee charge per child	-	-
Card Guarantee due date	-	25/07/2024
Pre-order	Yes	No
Pre-order due date	25/07/2024	-

PROCEEDING WITH NEW REQUIREMENTS WILL REMOVE CURRENT PRE-ORDER SELECTION!

RETURN TO BOOKING | PROCEED WITH NEW REQUIREMENTS

(b) Menu changed:



CHANGES TO BOOKING REQUIREMENTS X

Changes to the booking details triggered new requirements, please review below before proceeding:

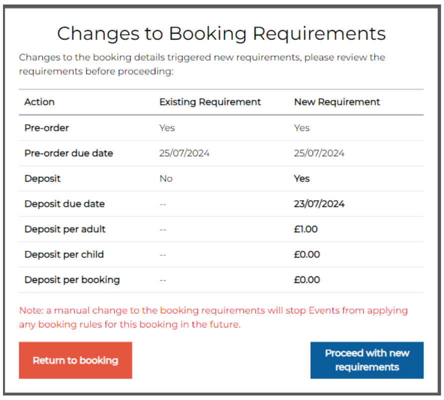
Action	Current Requirement	New Requirement
Pre-order	Yes	Yes
Pre-order due date	25/07/2024	25/07/2024

PROCEEDING WITH NEW MENU SELECTION WILL REMOVE CURRENT PRE-ORDER SELECTION!

RETURN TO BOOKING | PROCEED WITH NEW REQUIREMENTS

Finally, if a Host made a manual change to the booking requirements, we will now inform them that Events & Tables will no longer try to apply a booking rule to that booking:

Events:



Changes to Booking Requirements

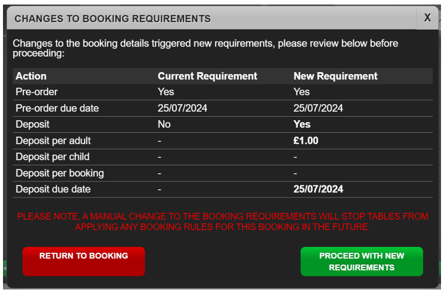
Changes to the booking details triggered new requirements, please review the requirements before proceeding:

Action	Existing Requirement	New Requirement
Pre-order	Yes	Yes
Pre-order due date	25/07/2024	25/07/2024
Deposit	No	Yes
Deposit due date	--	23/07/2024
Deposit per adult	--	£1.00
Deposit per child	--	£0.00
Deposit per booking	--	£0.00

Note: a manual change to the booking requirements will stop Events from applying any booking rules for this booking in the future.

Return to booking | Proceed with new requirements

Tables:



Please note, as part of this feature we have also fixed the descriptions for the requirements in the Guest Portal. The booking rule descriptions for Pre-order, Pre-payment, Card Guarantee and Extras payment will now display correctly in the appropriate tiles.

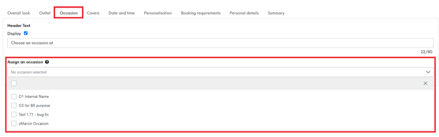
[Events] - Estate Admin - Ability to specify Occasion and fonts - PPL-1248

The aim of this feature is to allow user to customize their widget template with specific occasions, referral sources and fonts.

Following the success of the first release in 1.69, we are further enhancing the Events Booking Widget (booking form) with some exciting new features. From this release onwards Estate Admin users will be able to select a font for their widget, select Occasions to show, select a specific booking source, as well as a few other amazing additional items. With those changes we strive to provide a seamless experience when creating a bespoke journey for your guests!

Assigning Occasions to Widget Template

A new section for occasions has been added under the Occasion tab, called "Assign an occasion":

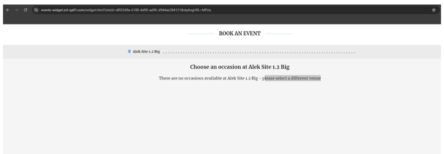


This functionality allows the user can assign one or multiple available occasions to a template that allows them to customize their occasion page on their widget.

- By default, no occasion is assigned to the template.
- Any available occasion is displayed in the dropdown menu.

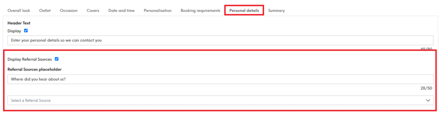
- Occasion without ‘Channel: Widget’ are also displayed in the dropdown menu but in italics.
- If multiple occasions are assigned and some of them as misconfigured, only the occasion with the correct configuration is loaded on the widget.

If an occasion is not configured correctly (i.e. wrong site selected), on the widget, the message shown below is displayed:



Assigning Referral Sources to Widget Template

A new section for referral sources has been added under the ‘Personal details’ tab called ‘Display referral sources.’



This functionality allows the user to:

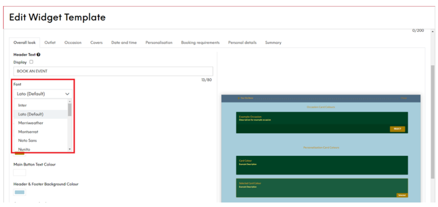
- Edit the ‘referral source placeholder’ text.
- Assign one or more referral source to the template.

Conditions

- If only one referral source is assigned to the template, it is automatically selected and greyed on the widget.
- If multiple referral sources are assigned, the user has the option to choose the most appropriate referral source or none.
- If there are no referral sources created on Booking Sources, this functionality is disabled on the widget customizer.

Fonts on Widget Template

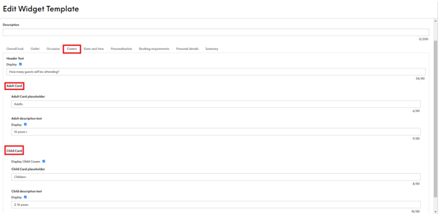
On the widget customizer, the font option has been added to allow users to edit the fonts of the text found on the widget, as shown in



- By default, ‘Lato’ font is loaded for all widget templates.
- A non-exhaustive list of fonts is added to the dropdown menu, based on the list of ‘most used Google Fonts’.
- The selected font is applied to all texts found on widget. We do not allow for targeted font change.

Cover Cards on Widget Template

Users can now edit the text and hide child cover card on the widget:

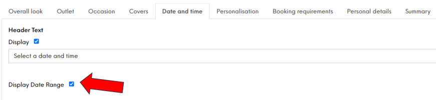


For adult cover card, users are to edit the placeholder and the description texts. However, on the adult cover card, only the description text can be hidden. For children, the users can hide the Child cover by unchecking the ‘display child covers’ checkbox. This will hide the child cover cards completely on your widget.

If Child covers is enabled, they can also edit the placeholder and description texts. Similarly, descriptions text can be hidden on its own.

Display date range

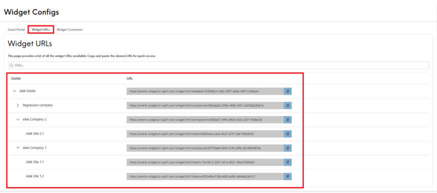
Users will now be able to hide away "Date range" on the date selector in the Widget:



[Events] - Estate Admin - Add Widget URL tab to display all widget URLS on Events Admin - PPL-1255

The aim of this feature is to allow user to quickly access widget URLs for their estate without having to request this information through Customer Succes/Support.

To make widget more accessible we've now added a way to access links for each Estate, Company and Site in a single place:



The widget URL is loaded for Estate, Company and sites. Users can copy and paste their widget URL by either clicking on the link or the copy button.

Technical Changes

[Events] - Estate Admin - Add time to requirement dynamic fields - PPL-876

Bookings - 1.71.0 | 2.71.0

Release Date: Staging 18 June 2024 | Production 2 July 2024

Status: Released to Production

For detailed information on Bookings 1.71.0 (events) and 2.71.0 (tables) release please view a section below.

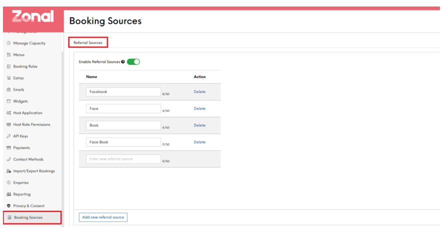
Summary New Features

[Events] - Marketing referral sources - PPL-903

The aim of this feature is to allow events host users to capture the referrals for bookings so that it can improve my marketing campaigns thus generating more business for Zonal.

To enable easier data collection we have introduced new "Booking Sources". We hope that this will allow our customers to better track the source of their bookings so that they can easier establish their highest traffic sources.

As shown in below, a new section called 'Booking Sources' has been added to the left-hand menu. Under the 'referral source' tab, Events admin users are able to create referral sources for their estate:

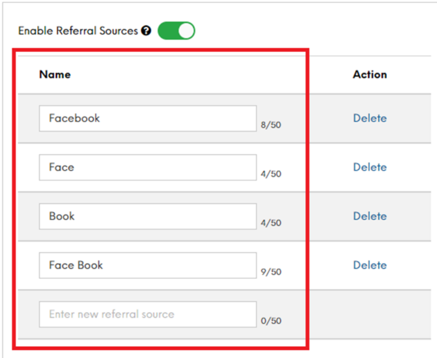


To activate referral source functionality, the user must use the toggle:

Functionality of the toggle:

- If the feature toggle is disabled, referral source functionality is hidden on Events Host and External API
- If the feature toggle is enabled, it is mandatory for the user to create at least 1 referral source.
- If the feature toggle is disabled, all referral sources added are kept and not erased.

Once the feature toggle is enabled, the user can start adding referral sources using the 'name' field, illustrated below:



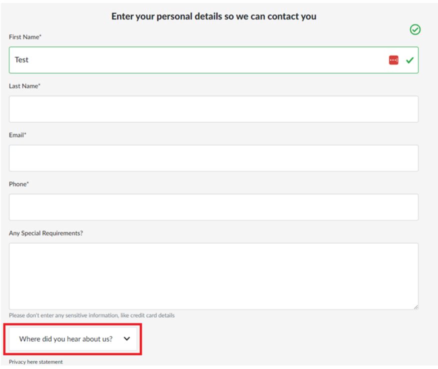
Please note the below limitations of the naming of the sources:

- Referrals source names cannot be duplicated (e.g. Facebook & facebook are considered the same, but Facebook & Face book are considered different)
- Each referral source has a character limit of 50 characters.

After configuring the referral source on the Events Admin, all bookings contains a section to choose the appropriate referral.

1. Booking Widget

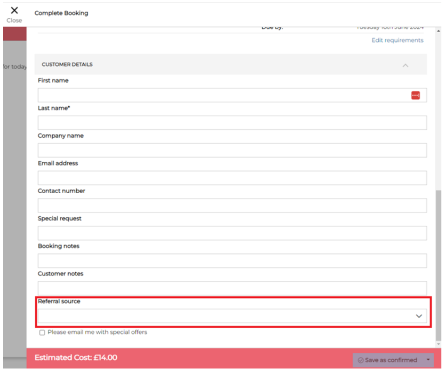
As shown on the screenshot below, on the Widget, a field called 'Where did you hear about us' was added on the personal details page, where users can pick from the pre-configured selection:



Worth noting is that choosing a referral source on the widget is NOT mandatory and the Guest user can choose only 1 referral source available in the list.

2. Events Host App

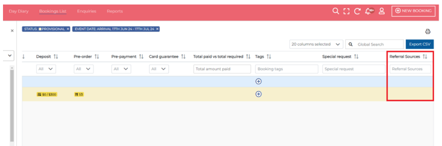
On the Events Host app, a referral source dropdown list was added:



Dropdown functionality:

- Choosing a referral source on the Host application is NOT mandatory.
- Host app users can choose only 1 referral source available in the list.
- Host app users can change referral source for existing and future bookings only.
- If a booking is in the past (arrival date has passed), referral source cannot be changed.
- If a referral source is deleted on Events Admin, this referral source is kept on past bookings only. For future booking, the deleted referral source is not available for selection.

For reporting purposed, a new column called ‘Referral Sources’ is added on the Bookings List:



Column behaviour:

- An empty field is displayed for bookings that do not have referral source,
- Host app users can export CSV with referral source column.
- Host app users can print with referral source column.

3. External API

This functionality has also been added to the External API, please see below for further details:

GET /outlets endpoint

Extended response with Referral Sources configured on Events Admin.

- If Referral Sources configuration is disabled then empty collection is returned

```
          "currency": "gbp",
          "features": {
            "bookableAreas": false
          }
        }
      ]
    }
  ],
  "referralSources": []
}
```

- If Referral Sources configuration is enabled then collection of Referral Sources is returned

```
          "timezone": "Europe/London",
          "currency": "gbp",
          "features": {
            "bookableAreas": false
          }
        }
      ]
    }
  ],
  "referralSources": [
    {
      "name": "Facebook"
    },
    {
      "name": "Instagram"
    },
    {
      "name": "Web"
    }
  ]
}
```

GET /events, /events/{eventId}, /enquiries/{enquiryId]

- If Referral Sources configuration is disabled, Referral Source is not returned from those endpoints
- If Referral Sources configuration is enabled, Referral Source is returned when it is added for a booking

```
    "status": "Enquiry",
    "telephoneNumber": "01234123",
    "siteTimezone": "Europe/London",
    "time": "12:00",
    "turnTimeMinutes": 120,
    "requirements": null,
    "referralSource": "Facebook"
  },
```

In both cases when it is not returned it means that the whole property is not present in the response:

```
    "specialRequest": "",
    "status": "Confirmed",
    "telephoneNumber": "01234123",
    "siteTimezone": "Europe/London",
    "time": "08:00",
    "turnTimeMinutes": 120,
    "requirements": null
  },
```

POST /events, /enquiries

- When creating an Event or an Enquiry, Referral Source can be provided in the request.
- Referral Source is not mandatory field
- If Referral Source is invalid or empty, then it is simply ignored and booking is created without it

[Events] - Events Bookings Import Tool Enhancements - PPL-1246

This feature expands the previously released Import Tool with new quality of life changes.

With this feature we are bringing further changes to the New Import tool that premièred in the last release. We started with improving the stability of the tool, as we've introduced an automated task that will be clearing out failed import files.

Additionally, to minimise the risk of uploading an incorrect booking and to bring the import tool in line with the rest of our systems, the initial validation will now refuse any booking where adult covers are less than 1. This error will be referenced as "Cover values must not be less than 1" in the "CSV file with errors referenced" available to the Admin users.

Finally, we are bringing in a new import setting that should make the uploads easier and more straightforward - "Ignore Cover Restrictions". When selected the import tool will ignore the cover restrictions set by associated with Occasion, Menu or Area assigned to the booking. This should enabled Admins to migrate sites much quicker and with less initial Occasions, Menus or Areas set up.

To ensure that Admin users are clear on how each of the import settings work we've added tooltips to each of them:

Each of those tooltips will display the following messages when hovered over:

- Ignore Booking Rules - "Existing Booking Rules will not be triggered or applied to this import."
- Do not send email or SMS communications to Guests - "Events and Tables will not send any communications to provided phone numbers and email addresses on creation of the booking."
- Turn off Table's auto-assign for this import - "Tables Host app will not assign any tables to the newly imported bookings."
- Ignore Capacity - "All bookings will be imported regardless of capacity limitation for the site."
- Ignore Cover Restrictions - "This option ignores minimum and maximum covers restrictions for Occasions, Menus and Areas associated with the imported bookings."

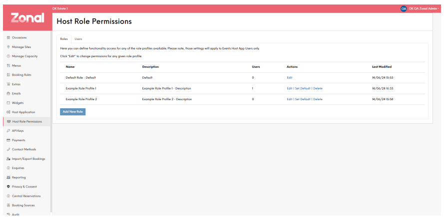
[Events] - Host Role Permissions - PPL-272

This feature brings role permissions to Events Host app.

Because every site and every user is different we bring you our first step towards greater user control within Events ecosystem - Host Role Permissions. The Estate Admin user will be able to define the host permissions and create different level of access to the Events Host Application. This will benefit by adding different levels of access to different types of host users.

1. Host Role Profile creation.

Our journey with permissions begin in Events Estate Admin app. Users will now find a new tab "Host User Permissions":

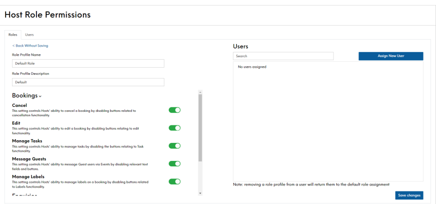


Here you can see the following columns:

- Name - assigned name of the Host Role Profile
- Description - assigned description of the Host Role Profile
- Users - total number of Host users assigned to the role
- Actions - allow Admin users to edit and delete a role or set it as default
- Last Modified - gives the date and time of the last change to the role

There users will find the default role, it is automatically created on every estate and assigned to all existing host users, with all permissions enabled to ensure that no user loses access to any part of the system during the initial roll-out. Additionally, this enables those users who do not want to interact with this feature to ignore it altogether - if no new role is created, your users will not see any difference in their access.

By clicking "Add New Role", you will be able to configure an entirely new set of permissions for your Host users, as can be seen below:



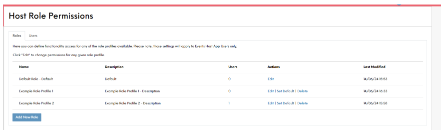
On that page you can:

- Name the role
- Add a description to it
- Configure permissions using sliders in the permissions menu
- Add and remove users from the role

Currently existing permissions are split into 2 categories:

- Bookings - with the following permissions:
    - Cancel - This setting controls Hosts' ability to cancel a booking by disabling buttons related to cancellation functionality.
    - Edit - This setting controls Hosts' ability to edit a booking by disabling buttons relating to edit functionality.
    - Add Tasks - This setting controls Hosts' ability to manage tasks by disabling the buttons relating to Task functionality.
    - Message Guests - This setting controls Hosts' ability to message Guest users via Events by disabling relevant text fields and buttons.
    - Add Labels - This setting controls Hosts' ability to manage labels on a booking by disabling buttons related to Labels functionality.
- Enquiries - with the following permissions:
    - Accept - This setting controls Hosts' ability to accept Enquiries via the Events Host app.
    - Reject - This setting controls Hosts' ability to reject Enquiries via the Events Host app.
    - Edit - This setting controls Hosts' ability to edit Enquiries via the Events Host app.

Once you click "Create Role" that will save, and you will be able to see it on the "Roles" sub-tab landing page:



Here you will also be able to utilise:

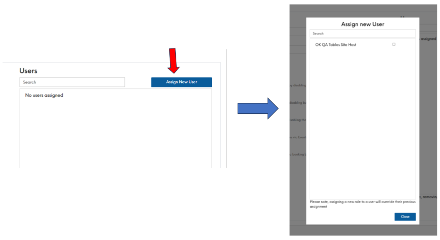
- "Edit" - which will open the role creation screen as seen above, allowing user to make changes to the existing configuration
- "Set Default" - change the default role to a different one, you will see that the name of the default role is always followed by "- Default" for the convenience of the user
- "Delete" - once clicked it removes the appropriate role, while moving all assigned Host users to the default role

> **Please note - at the moment, there is a maximum of 3 Host Role profiles per Estate.**

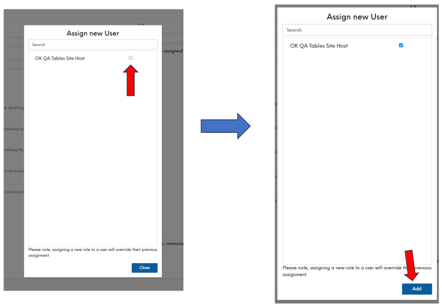
2. Assigning role profiles to users.

There are 2 ways to assign a user to a profile, and vice-versa.

First one is available only to Estate Admin users, as this can be done from the role creation screen by clicking "Assign New User" button, then a pop-out window will open allowing the Admin to browse all Host users assigned to the Estate, either by scrolling the list or by utilising the search bar:



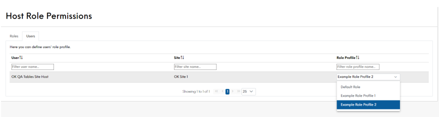
To assign a Host user to the role profile, simply click the box next to the user name to "tick" it, then use the "Add" button - you will see the user added to the "Users" list:



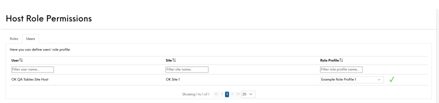
On this screen you can also remove the role assignment by "unticking" the user on the list and hitting "Save Changes", users un-assigned this way will be returned to the currently selected default role.

Second one is available to all Admin users (Estate, Company and Site). It can be access via the "Users" sub-tab, where Admins will find a table of Host users currently associated with their Estate. This table lists Hosts' user name, associated site and currently assigned Role Profile. What is more, to make Admins' lives easier each of those columns can be sorted alphabetically and filtered using the search bar.

On this screen Admin users can use the dropdown to easily change role assigned for each Host user:

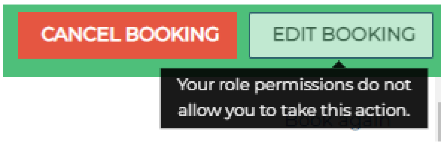


There is no need to hit "Save" anywhere on that page, as all role assignments are automatically saved. This will be communicated to the user with a green tick, which appears after a new role has been successfully assigned.



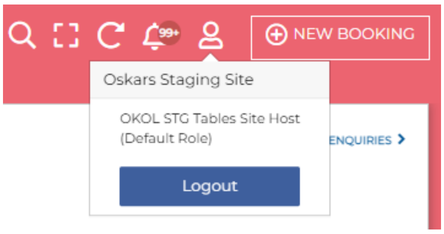
3. Events Host app implementation.

To ensure that Host users are not confused as to why some of the previously available functionality has been disabled, we implemented a message in Events Host app that appears when the user hovers their mouse cursor over the disabled function. For example, if the ability to edit a booking has been disabled, the Host user will see the below message:



This message is standard for all permissions.

Moreover, the assigned role will display in brackets underneath Host's user name in their account details:



[Events] - Pre-Order - Events Accepting / Actioning changes made to Menu's in iOrder - PPL-1024

This feature makes changes to Pre-Orders easier to manage.

Previously, when changes were made to a menu in iOrder this could cause problems with pre orders as the menu was cached in Pre-Order at the time the it's created. Updating the menu, for any reason, e.g. product was superseded by another due to supply issues, new item needs to be added (was missed in error), a cosmetic change to the product (meta data) forced all guests to reselect their orders. Additionally, there was no way to easily view impact of making a change in iOrder and what needs done next.

To make the pre-order journey easier for all parties involved, we want to provide the ability for menus to be updated in iOrder & Pre-Order and for our Customers to decide whether guest action is needed, and if so notify the guest to confirm their menu selection. We believe that this is the key value of the feature, as from this release onwards, Events will consume the information from iOrder on changes to already open menus. This will allow customers using iOrder will be able to update the menu and send said update to their guests who are using this menu without removing the entire pre-order. Guests who may be affected by a change, will be notified to take action and update their selection. This will reduce the time spent chasing customers and updating them booking by booking.

Guest will be notified via an email template "Pre-order Updated", which can be found for further customisation in the Events Estate Admin > Emails tab.

Please note - at the moment, only the lead guest on the booking will receive an update email. Additionally, Events Host app's Pre-order pill icon will remain in its completed status even when the guest user needs to update their pre-order.

Technical Changes

[Events] - New Zonal Default T&C's - PPL-1206

This feature corrects Zonal's default terms and conditions to reflect the Company name.

Previously Zonal's default terms and condition would not correctly display the Company name, meaning that the conditions were not bespoke. This change ensures that when you select a company from the dropdown in Events Estate Admin Privacy & Consent Tab, Events will generate the correct URL for the company to the new default terms and conditions.

What is more, when no custom terms and conditions are set up for the Company/Estate ithen correct Zonal default terms and conditions link is now shown in the Widget and External API.

Bookings - 1.70.0 | 2.70.0

Release Date: Staging 21 May 2024 | Production 11 June 2024

Status: Released to Production

For detailed information on Bookings 1.70.0 (events) and 2.70.0 (tables) release please view a section below.

Summary New Features

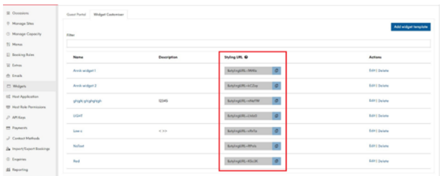
[Events] - Estate Admin - Events Widget Customizer Enhancements - PPL-1244

The aim of this feature is to improve the functionalities and user experience on the widget customizer.

We are updating our newest widget tool with additional functionality to make the user experience more intuitive and straightforward.

Styling URL column & copy function

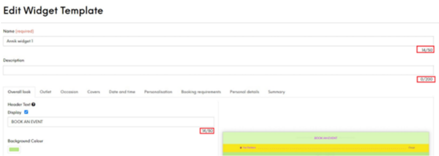
A styling URL column was added on the list view of the widget template page:



After saving a widget template, users can copy the 'Styling URL' link by directly clicking on the link or using the copy link function. Additionally, the same functionality has been added on the widget template page:

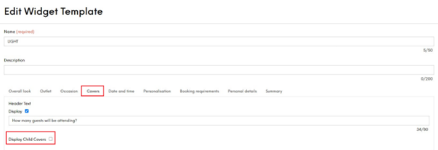
Character count function

On the widget template, a character counter was added next to all text field as shown below. This will allow users to know the limitations of each field.

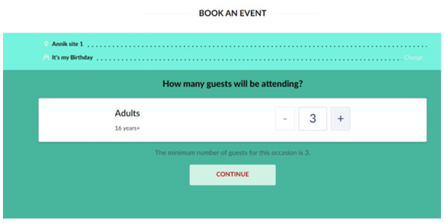


Hide / Unhide Child covers function.

On the widget customizer template, the functionality to hide / unhide child covers was added:

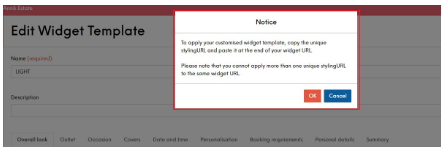


If, the checkbox for ‘Display child covers’ is unselected, the child cover section will be hidden on widget by applying this widget template:



Notice on Save button

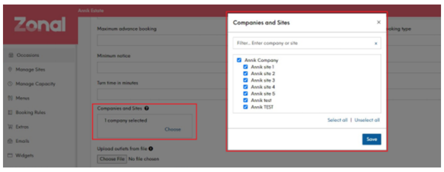
To provide guidance to the users, as illustrated below, a notice warning has been added after the user clicks on the ‘save’ button:



[Events] - Estate Admin - Change Site selector on Zonal Admin - PPL-1206

The aim of this feature is to replace the existing site selector on Zonal admin for Occasions, Menu and Extras to improve user experience.

As part of our feedback, we had a look at our Site selector that can be found on config pages in Zonal Estate admin. The site selector has been optimized to allow users to choose from companies and sites by using checkboxes and filtering options:



Please note - • Retroactivity is applied when deploying this feature. Therefore, all companies and sites for occasion, menu and extras are automatically selected.

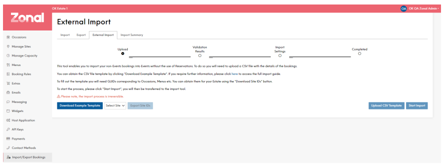
[Events] - Zonal Admin - Events Bookings Import Tool - PPL-783

We are bringing a new way to upload external bookings into Events.

As we capture new market and onboard new customers we spend a lot of time moving their bookings into Events and Tables. This is because our previous import tool was limited in its functionality, as it required the new bookings to be first imported into Reservations format, before it could change them into Events' bookings. We hope to address this shortcoming with this feature, as we will now enable Zonal Admin users to upload external bookings into Events. It is hoped that in the future this feature will be enabled for Estate Admins as well, so that it becomes a self-service tool for the users to take off the workload from Zonal teams.

This tool is available in Import / Export Bookings tab under "Import External" sub-tab. Below we will outline the process, however, a comprehensive guide will be available for the users as well.

1. Landing page and the first step of the import process.

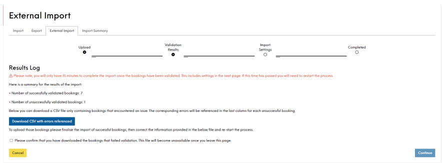


Here users are able to complete the initial actions of the process:

- "Download Example Template" - allows user to download an empty upload template which outlines data that needs to be supplied in order to import a booking.
- "Select site" - to start the process user will need to select which site they wish to upload to. When user clicks on this dropdown, a search bar will open allowing them to conveniently look for a specific site.
- "Export site IDs" - this button will become clickable once user has selected a site. Once clicked on it exports all necessary GUIDs for the selected site - Occasions, Menus, Areas - in an easy to read CSV format.

- "Upload CSV template" - allows user to select a CSV file from their local storage. Once uploaded, the name of the file will appear on the left from the button, confirming correct upload. Please note that the import tool will not accept any other file format than CSV.
- "Start Import" - once user has selected the site and uploaded the CSV import template, then this button will become clickable. Clicking it will begin the import process and transfer the user to a loading screen while the import's data is being validated.

2. Results log

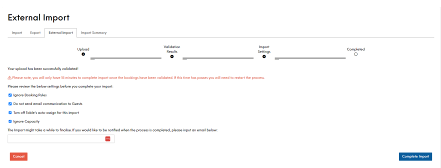


Once the import has gone through the validation, the results will be displayed on this screen. User will be able to see the number of successfully and unsuccessfully validated bookings. Conveniently, by clicking "Download CSV with errors referenced" user can also download the failed bookings in a handy CSV file containing only the unsuccessful ones, so that they can be corrected and re-uploaded at a later time. However, user will be able to proceed with the successful bookings.

Because the failed bookings are kept in Events' cache, they will not be available once user leaves this screen. Therefore, you will need to confirm their download with a manual tickbox. Only then will you be able to proceed with import by clicking the "Continue" button.

> **Please note: In order to ensure that Events is not overwhelmed by the amount of data uploaded at any point, from this screen onwards you will have 15 minutes to finalise the import. This does not include the time required for Events to actually create the bookings.**
>
>

3. Admin page



Here users will be able to customise their import by selecting the below settings:

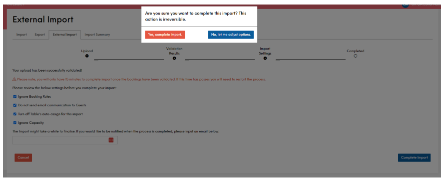
- "Ignore Booking Rules"
    - If ticked (ON), then the new bookings will not send any of the initial email communications to newly added guests.
    - If un-ticked (OFF), then the import will respect any booking rules that might have been triggered
- "Do not send email communication to Guests"
    - If ticked (ON), then the new bookings will not send any comms to newly added guests
    - If un-ticked (OFF), then the new bookings will send respective email communications to newly added guests.

> **Please note - this setting works only for emails in Events, to ensure that SMS communications are not send out, you will need to turn them off in Tables.**

- "Turn off Table's auto-assign for this import"
    - If ticked (ON), then this setting will overwrite Tables' auto assign functionality so that users are not automatically assigned tables
    - If un-ticked (OFF), then this setting will respect Tables' auto assign functionality - it's important to mention that this setting being off doesn't automatically turn on the setting in Tables but simply respects it if it is set to ON
- "Ignore Capacity"
    - If ticked (ON), then this setting will ignore any capacity constraints for the new bookings
    - If un-ticked (OFF), then this setting will respect available capacity for the new bookings

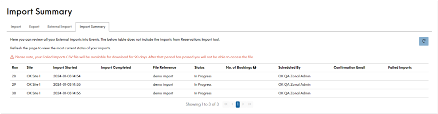
Additionally, the user, if they choose to do so, can input an email to receive a confirmation of import completion. This is not a mandatory field and so can be left empty.

Finally, in order to finalise the process user will need to click on "Complete Import" button and confirming by clicking on "Yes, complete import" on the pop-out that follows:



User is then transferred to the import summary tab.

<u>4. Import Summary page</u>



This sub-tab contains summary of all previous and ongoing imports in an easy to read table format. It is accessible at any point from the Import / Export Bookings tab.

Please see explanation of each of the columns below:

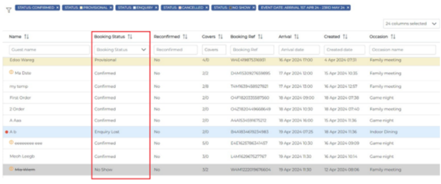
- Run - numerical value, unique number of each import in rising order.
- Site - shows the name of the site to which the import was done.
- Import started - gives the date + time of when the import began (time and date when user clicked "Complete Import").
- Import completed - gives the date + time of when the import finished. The text in the cell will only appear once import is complete.
- File Reference - name of the uploaded file.
- Status
  - In Progress - shown when the import is still ongoing
  - Completed - shown when the import is completed
  - Partially Completed - shown when the import has failed after validation (for example: original user has completed the validation step, in the meantime other user has removed a valid GUID for the import by deleting an Occasion, then the original user attempts to complete the import against an invalid GUIDs. In such scenario Events will import the Bookings that have not encountered an error and allow the user to download the failed ones in a separate CSV file under "Failed Imports").
- No. of bookings - number of successfully imported bookings
- Scheduled by - name of the user who completed the process.
- Confirmation email - email that was input into the field on the previous screen. If there was no input, then nothing will show in this cell.
- Failed Imports - shown for imports that are in status "Partially Completed", remains active for 90 days from "Import Completed" date. Once user clicks on it, then a download starts with a file with failed imports ONLY.

[Events] - Host – Booking Status as a column on Bookings List - PPL-1206

The aim of this feature is users view booking status on the Bookings List page so that booking status can be easily identified.

To make reporting on your bookings easier we've introduced a booking status column to the Booking List in Events Host app. This will allow you to filter and sort your bookings based on their current status.

As shown below, ‘Booking Status’ column is added after the ‘Name’ column on Events Host > Bookings List page.



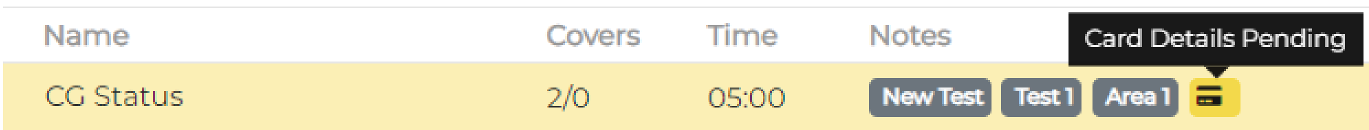
[Events] - Host - Card Guarantee Status Changes - PPL-872

This feature bring quality of life changes to Card Guarantee statuses.

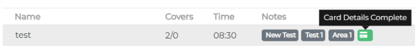
To make Card Guarantee a clearer feature we've introduced a new status "Charged". This is to reflect operational needs of Host users who manage bookings and require information at first glance.

Events will now distinguish between 3 separate Card Guarantee statuses:

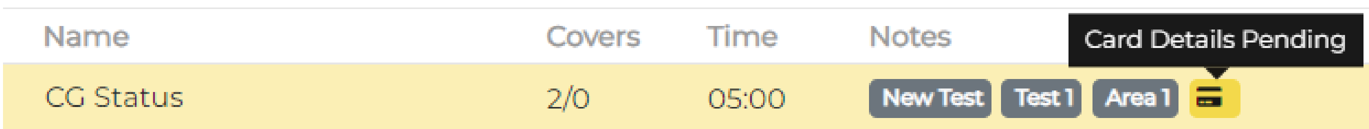
- "Pending" - for when the card details are not entered; represented with a yellow user pill:



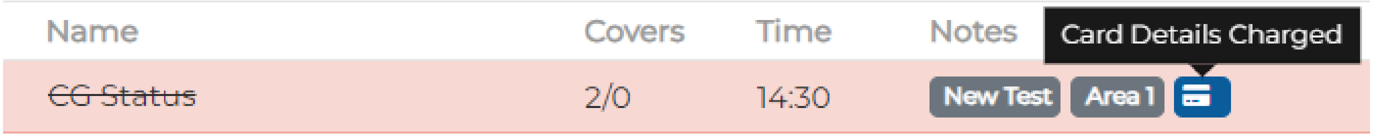
- "Complete" - for when the card details are entered; represented with a green user pill



- "Removed" - for when the card details are removed by the Host or by the Guest user; also represented with a yellow pill to mark that this requirement still isn't met



- "Charged" - when the card has been charged by the Host user; represented by the new blue user pill



Those statuses are now also available in the Booking List and its export:

- "Charged" - when the card has been charged by the Host user after the booking is marked as a no-show or is cancelled
- "Pending" - appears when the card details are yet to be input or the card details were removed by the Guest user via the Guest Portal
- "Removed" - for when the card details are removed by the Host user in Events Host app
- "Complete" - when the card details have been entered by the Guest user via the Guest Portal

Finally, to enhance the reporting capabilities of our system we've added a new column "card_guarantee_charged" to the Tables Nightly Extract, DataArchive extract and ReservationReport extract. This column has two possible statuses:

- "Y" - for when the card details have been charged
- "N" - for when card details have not been charged

SMS User Information on Update 'Send from' Information - PPL-1250

This feature addresses recent changes to the verification process for SMS Sender IDs.

As of the 18th April 2024, our SMS provider has implemented a verification process for SMS Sender IDs.

This is due to sender restrictions implemented by BT and EE:

BT/EE have introduced a series of new controls and restrictions aimed at protecting businesses and customers by reducing the likelihood of messaging scams and fraud.

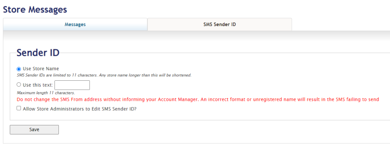
These rules apply, whether you are sending SMS by using Email to SMS, our portal, our API or via an automation.

BT/EE changes relate to sender IDs, URLs, the use of special characters and short codes.

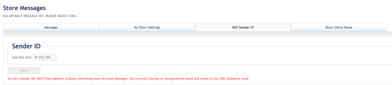
To address this change we have now added an additional warning to SMS set up in:

- Tables - "Do not change the SMS From address without informing your Account Manager. An incorrect format or unregistered name will result in the SMS failing to send"

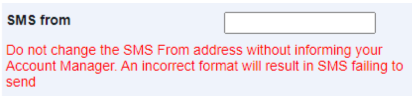
- Company Admin



- Site Admin



- Reservations - "Do not change the SMS From address without informing your Account Manager. An incorrect format will result in SMS failing to send"



Technical Changes

Bookings - 1.69.0 | 2.69.0

Release Date: Staging 23 April 2024 | Production 21 May 2024

Status: Released to Production

For detailed information on Bookings 1.69.0 (events) and 2.69.0 (tables) release please view a section below.

Summary New Features

[Events] - Host - Making changes easier with existing selections highlighted - PPL-1240

This feature makes editing a booking easier by providing user with more intuitive information.

With this feature we are striving to make the editing journey a more intuitive, and more importantly, an easier experience. Here we strive to achieve this in 2 ways, which we hope will reduce the number of accidentally changed Menus and thus Pre-orders.

Firstly, the current selection of:

- Occasion
- Menu
- Area
- Extras

will now always be displayed at the very top of each relevant list.

Secondly, when a Host user decides to change an Occasion for any booking, Events will no longer remove existing Menu selection. Instead, the Menu will remain selected and it will be up to the Host to decide if it should be changed or not.

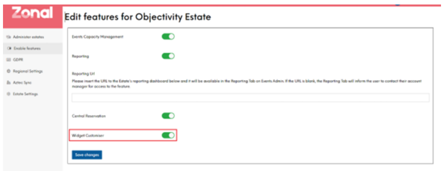
Please note - when a Menu becomes unavailable because of the changes to the booking Events will display the usual warning.

Lastly, it's worth pointing out that this feature is headed to Tables in the coming releases.

[Events] - Customisable Events Widget - PPL-942

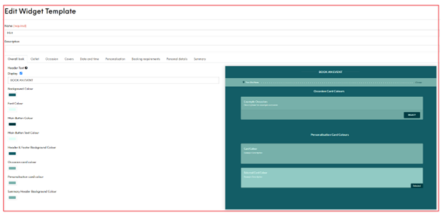
The aim of this feature is to allow events customise their widget with colours and texts so that they can design it as per their business needs.

As we work towards making our booking journey into one of a kind we now enable our customers to customise their Events Booking Widget with new colour schemes. Under ‘enabled features’ on Zonal Estate Admin page, a new toggle has been added, allowing users to turn on / off this feature at their convenience.=:

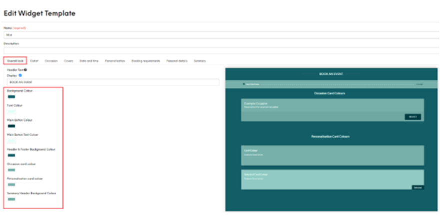


After enabling the feature toggle, on the Events Zonal Admin page > Widgets tab, a new sub-tab called ‘Widget customiser’ is displayed, as illustrated below:

On this page, the user can create, edit, and delete multiple widget templates. By clicking on the button, ‘Add widget template’, the page is loaded as shown:



The user can name their widget template by filling in the ‘name’ field (which is mandatory) and add a description (which is optional). The next step is to customise the colours which affect the whole widget. Under ‘Overall look’, the user can choose multiple colours within the palette displayed on the screen:

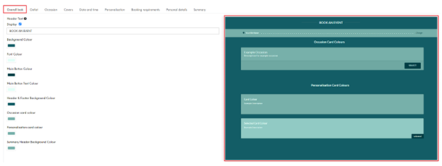


The user can choose colours for:

- Background
- Font

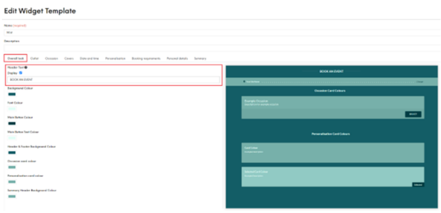
- Main buttons
- Main button Text
- Header & Footer background
- Occasion cards
- Personalisation cards
- Summary header

Any changes made to the colours are instantly previewed on the right-hand screen:



Additionally, the user can choose to:

- Rename the header text
- Enable / disable visibility of the header text

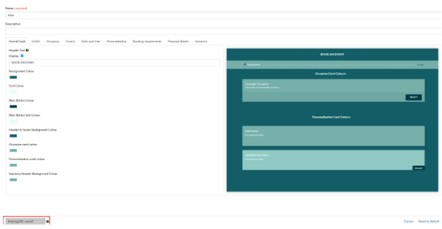


Please note - any changes to the texts are not reflected on the Live Preview screen

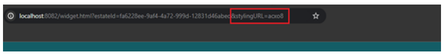
On the other tabs such as Outlet, Occasion, Covers, Date and Time, Booking requirements, Personal details and summary, the user can only:

- Rename specific text
- Enable / disable the visibility of the text on widget

After clicking on the ‘Save’ button, on the bottom left corner, the system generates a unique ID as shown below:



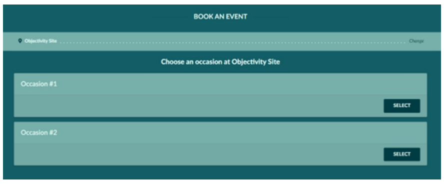
Once the user has copied the unique ID, the next step is to add it to the widget URL of the estate, company, or site:

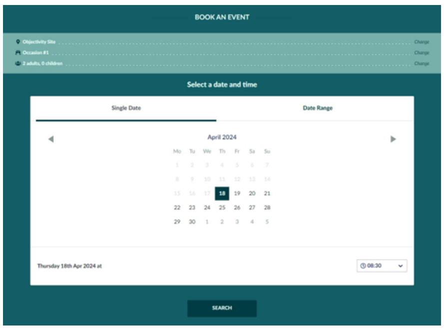


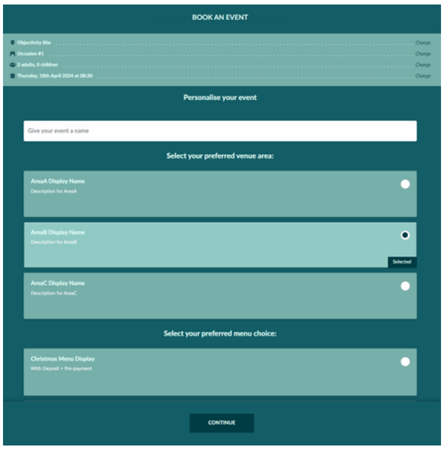
Conditions for the widget to work correctly with the new styling:

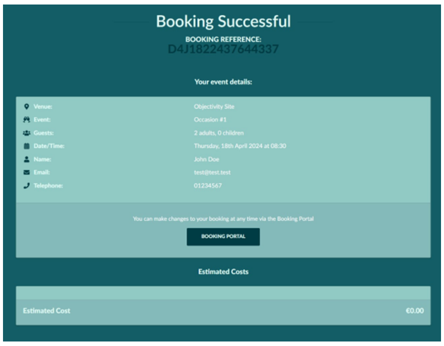
- Unique ID must always be added at the end of the widget URL.
- If the widget URL already contains a CSS style sheet, the system will not load the widget with the unique ID as the CSS style sheet is always the priority.
- If the user wants to replace the unique ID with another, the user must remove the existing unique ID and replace it with the updated unique ID
- 2 unique ID's cannot be added on the same widget URL

Once all conditions mentioned above are met, the widget is loaded with the customised template, as illustrated with the screen shots below:









Please note:
• If the feature toggle is enabled, the customised template is applied to the widget.
• If the feature toggle is disabled, the customised template is not applied to the widget and the styling of the widget is reverted to its original styling.

In addition to the widget customiser, new logics are implemented on the widget to improve the customer experience and decrease the time spent on making a booking. When configuring Occasion, Area and Menu:

- If there is only one Occasion, Area and Menu which are set as default and required, it is automatically selected for the user and is not displayed on the widget.
- If there is only one Occasion, Area and Menu which are not as required, it is not automatically selected for the user and is displayed on the widget.
- If there are multiple options for Occasion, Area and Menu but one is set as default, it is automatically selected for the user and displayed on the widget.
- If there are no Menu and / or Extras configured, on the widget, those sections are not displayed.

Please note - deleting a template that is currently applied to the widget reverts the widget to its original styling.

[Events] - Estate Admin - Add time to requirement dynamic fields - PPL-876

This feature expands the information available in the email dynamic fields.

At the moment, the dynamic fields for payment requirements (deposit, pre-payment, card guarantee) do not state the time deadline, only date. This can lead to guests missing out on confirming their bookings via payments or on pre-order.

To resolve that issue the below dynamic fields must now include time as well as date:

- %DepositCutOffDate% (in format Day of week, DD Month YYYY, HH:MM)
- %CardGuaranteeCutOffDate% (in format Day of week, DD Month YYYY, HH:MM)
- %PreOrderCutOffDateTime% (in format Day of week, DD Month YYYY, HH:MM)

Additionally, we added a new dynamic field %PrePaymentCutOffDate%, which pulls through date & time for the pre-payment cut off as set up in Events Admin, also in format "Day of week, DD Month YYYY, HH:MM".

[Tables] & [Events] - Telephone validation to support SMS

This feature adds greater success in sending sms's to guests by ensuring the correct format is input.

Prior to this release it was possible for a Host, in either system, to input an invalid telephone number, for example, '123456789'. This would mean that if the site wanted to send an SMS to this guest, it would fail to send as the number is not valid.

From this release all telephone numbers will need to start with either a '0' or a '+'. This will ensure the number is valid and SMS can be sent.

Please note this change does apply to the API guest journey, customers who use the API will need to ensure they check their validation on the guest journey.

Technical Changes

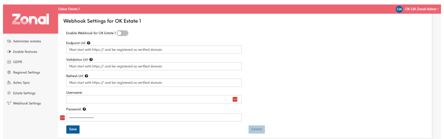
[Events] - Send notification in real-time - New (Created), Amended or Cancelled bookings - PPL-1030

This feature created a Webhook to send bookings updates in real time.

Our customers and 3rd party partners require us to send them specific updates on bookings. This would be for when a booking has been:

- created (confirmed),
- updated (amended)
- cancelled.

The webhook service can be set up by a Zonal Admin > Webhook Settings > *select an Estate.*



For input fields explanation, please see below:

- Endpoint URL - Endpoint where the webhook service will send event messages. Verified domains can be managed in Events Admin - Estate Settings.
- Validation URL - Endpoint which the webhook service will call to get an access and refresh token, using the username and password provided. Verified domains can be managed in Events Admin - Estate Settings.
- Refresh URL - Endpoint which the webhook service will call to get a new access token, using a refresh token and the username and password provided. Verified domains can be managed in Events Admin - Estate Settings.

As Zonal's client, to use the webhook, you will first need to provide Zonal with credentials (passoword & username) for the validation endpoint. Our webhook will then hit the validation endpoint with a encrypted "username:password" in the header and check the username and password match the ones provided.

> **Please note - On initial set up, a password is required. On edit the input can stay blank to retain previously set password.**

Bookings - 1.68.0 | 2.68.0

Release Date: Staging 26 March 2024 | Production 9 April 2024

Status: Released to Production

For detailed information on Bookings 1.68.0 (events) and 2.68.0 (tables) release please view a section below.

Summary New Features

[Events] - WorldPay as Payment Provider in Events - PPL-1206

This feature expands the reporting functionality in Events.

As part of expanding our offering we provide a new integration with a payment provider - WorldPay. To enable that please contact your account manager, as you will need to obtain certification from WorldPay.

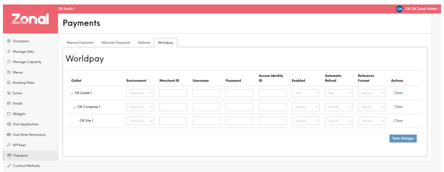
Once this has been enabled you will be able to enabled WorldPay provider by going to Events Estate Admin > Payments tab > WorldPay. There you will see the below input fields:

- Environment
    - SandBox
    - Production

  Merchant ID
- Username
- Password
- Access Identity ID
- Enabled
    - Yes
    - No
- Automatic Refund

- Yes
- No

- Reference Format
    - Site ID
    - Aztec Site ID



You will be able to utilise WorldPay once those have been correctly filled out as per you WorldPay configuration. The standard inherit structure will allow you to configure different setups for your Estate, Companies and Sites. Please note that by default Companies and Sites will inherit the Estate setup.

> **All current payments features, such as deposit, pre-payment, card guarantee etc. will automatically be available with WorldPay.**

UPDATE - 31/07/25

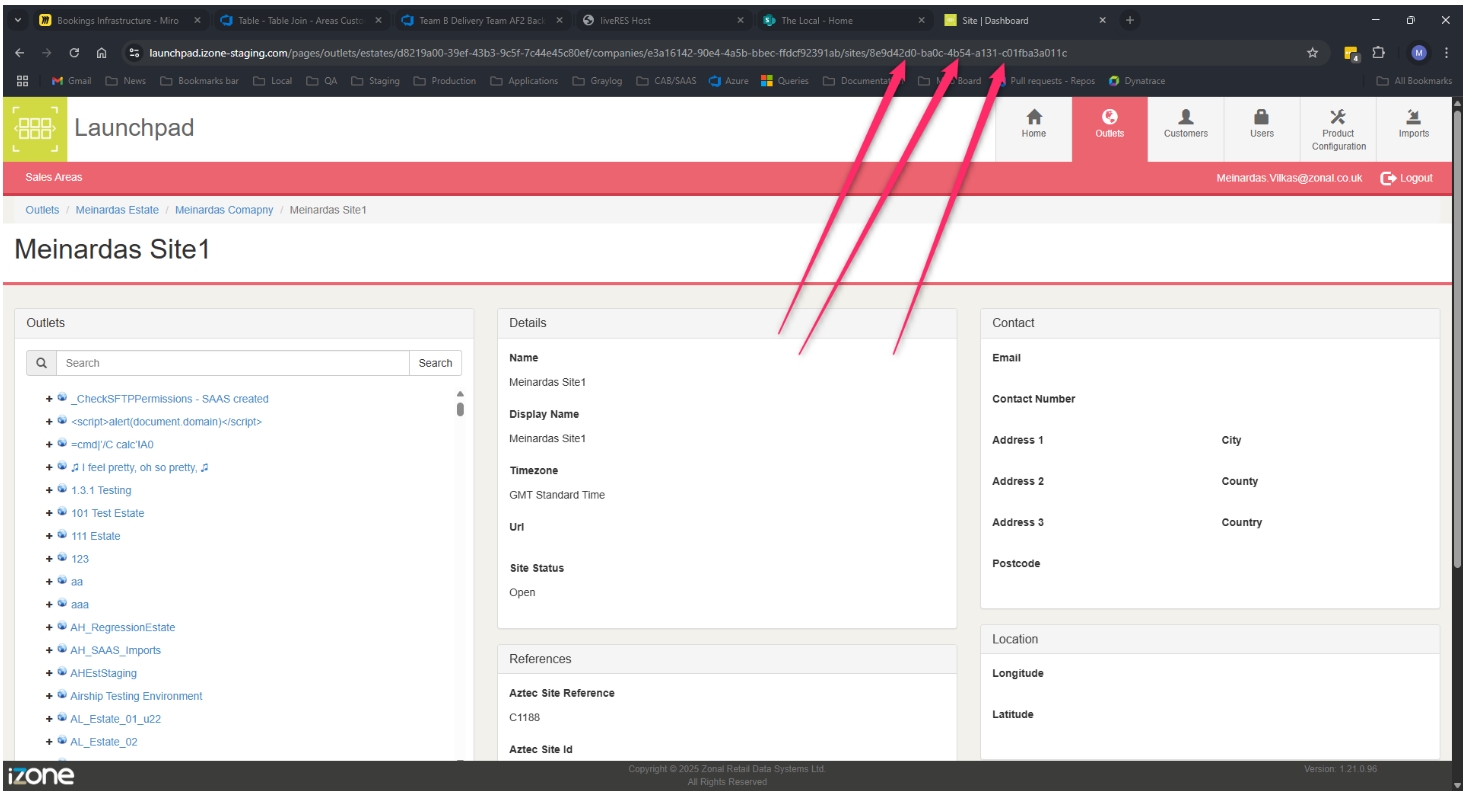
Some additional information regarding WP as a payment provider.

Choosing Site or Aztec ID in the reference format dropdown - the 2 options available are:

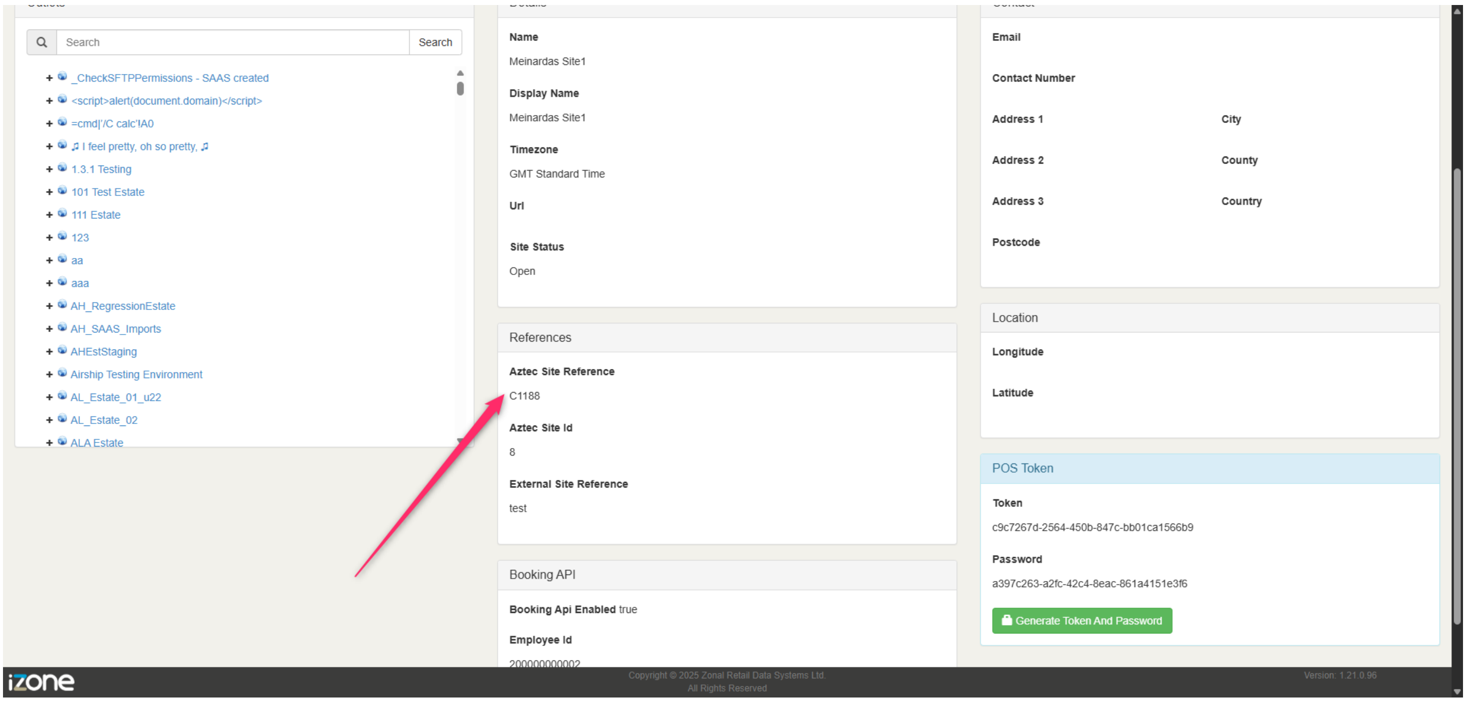
- Launchpad Site ID (Default):
    - format: {unique payment reference}/{site id guid}
    - example: 5ac6bcc20e/b1cc938c-c036-454b-9f12-db9219bd164b
- Aztec Site Reference:
    - format: {unique payment reference}/{aztec site ref}
    - example: 5ac6bcc20e/8976

  If Aztec site reference is empty, We will revert to using the default site ID instead.

Site ID - Site ID can be found in platform services here:



Aztec Site Reference:



> IMPORTANT: The information on the page will only save if you have saved something in each row, if 1 is left blank, even if you pressed save, it will not save.

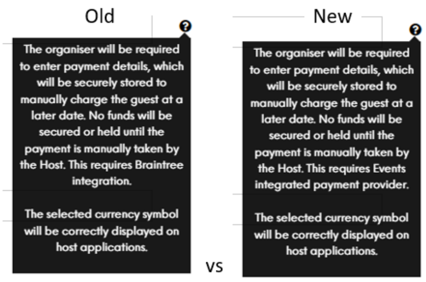
For WP - Our "Access Identity ID" is "Worldpay's Access Checkout ID"

[Events] - Estate Admin - Payments UI - Remove 'Braintree' to 'Payment Provider' - PPL-1222

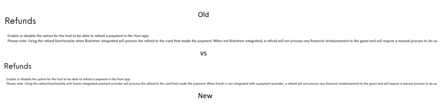
As we introduce new integrated payments providers we need to ensure that Events' tool-tips still provide up to date information.

With the previous feature introducing WorldPay as our new integrated provider, we had to update all of our tool-tips that previously referred to Braintree only. Please see below for list of changes:

1. Booking Rules - Card Guarantee action user icons



2. Payments - Refund tab



[Events] (Upsells) - Payment as part of the booking - PPL-1137

This feature expands on the previous functionality of Extras across all of our systems.

As you might remember, when we previously introduced our reworked Extras, there was one crucial caveat - users were not able to pay for them during the booking journey. With this feature we resolved this issue, as Admins will be able to configure Extras and Booking Rules in order to capture those impulsive purchases and lock them in.

> **Guest Users will now be able to complete payments for Extras via the Booking Widget, Guest Portal and External API.**

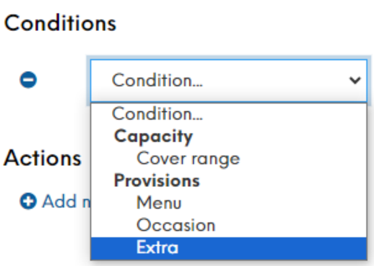
Changes introduced with this feature are spread across multiple platforms and users, we will start at the beginning of the payment journey with Events Estate Admin and their ability to set up a booking rule for Extras' payment:

1. Estate Admin - Booking Rules:

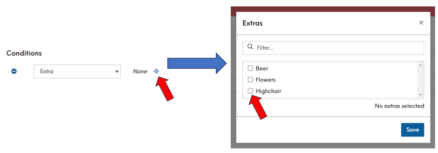
a. New Condition - Extras

Estate Admins have been given the ability to set up a new condition for **all** booking rules. They can now be triggered for any booking when a specific Extra is selected.

"Extra" is now selectable in the conditions dropdown:



Once selected, the Admin user will be able to specify which exact items will become the trigger point for the Booking Rule:

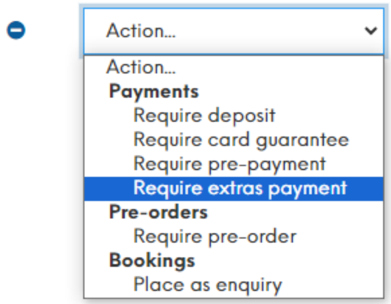


Because we want to give users as much freedom with Extras' setup as possible, this condition can be combined with any other Actions. That way Extras can also become a trigger for a Deposit, Pre-order, Card Guarantee, Extras payment or even an Enquiry.

b. New Action - Require Extras Payment

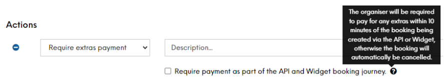
This new action will force users to pay for Extras ahead of their arrival at the site. As mentioned before, this is to help capture all impulsive purchases and make them much more meaningful by locking them in via a payment.

Actions



Please note - just like "Require Deposit" and "Require Pre-payment", the action "Require Extras Payment" cannot be selected together with "Require Card Guarantee"

Additionally, Admin users will be able to specify whether the Guest should pay during the initial booking journey in the Booking Widget or External API. This can be done by checking (setting it to ON) the tick-box visible in the screenshot below. Alternatively, if the tick-box is not selected, the Guest User will be able to pay for the Extras via the Guest Portal.

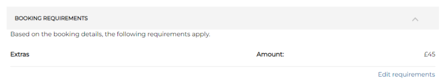


2. Events Host

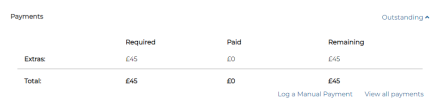
Before we go on to describe functionality related to payments of Extras in the Events Host app, it is worth mentioning that Events Host users will now be able to override any Extras quantity selection requirements. This is to enable Hosts to further create a more bespoke events for their guests.

a. Payment Requirements

First step is for Events Host to confirm that the Extras payments requirement is correctly attached to the booking. This can be seen when the Host is creating or editing a booking, as it will be displayed in the "Booking Requirements", please see below:

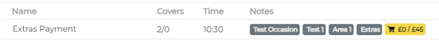


This will also be reflected in the payments table in booking's details, as can be seen:

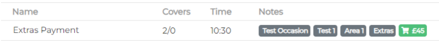


This payment requirement is also visible in Day Diary view of the booking via introduction of a new user pill. It follows the same logic, as all other requirement pills in Events - it will remain yellow until the entire payment has been complete, then it will turn to green:

Unpaid:

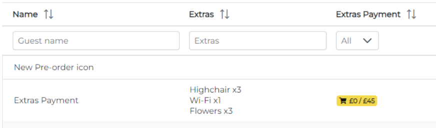


Paid:

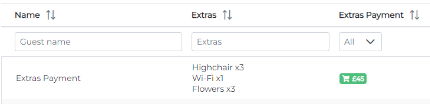


Finally, the payment status will be visible in the Booking List view of bookings. The icons here follow the same logic as they do in the Day Diary:

Unpaid:



Paid:



b. Refunds and Deallocation

> **Refunds and deallocation of resources from Extras has been descoped for this release. Please bear with us as we work to deliver it for next release 1.69.**
> **Please note - Host users will still be able to manually allocate an overpayment to Extras. When auto-allocation is applied to transactions, then Extras should be the last in terms of priority, following the priority of Deposit > Pre-payment > Extras**

c. Reporting

To ensure that users can clearly track Extras usage across their sites, new reports have been added to Events Host app. We hope that this will enable users to get the most out of them, and keep them prepared for upcoming bookings:

Run Sheet

To provide more accurate information for any events, Run Sheets' Booking Details section will now include Extras together with their quantities:

RUN SHEET

CUSTOMER DETAILS

Customer Name	Extras Payment
Phone	11111111
Email Address	test@c.com

BOOKING DETAILS

Booking Reference	E3Z2155658598855
Site Name	gd2site
Date	30/03/2024
Time	10:30
Covers	2 / 0
Occasion	Test Occasion
Menu	Test 1
Extras	Highchair x3, Wi-Fi x1, Flowers x3
Area	Area 1

Special Requests

Booking Notes

1 / 1

Booking List

As showcased in the screenshot below, Booking List will now also include Extras together with their quantities. Morever, the required payment in form of paid / total to be paid is also included to make tracking of Extras' payments even easier. Those are available in both Events view as well as in the CSV export:

Events:

Name	Extras	Extras Payment
Guest name	Extras	All
Extras Payment	Highchair x3 Wi-Fi x1 Flowers x3	£45

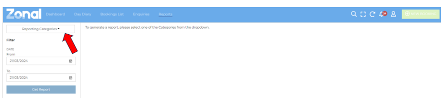
CSV:

A	B	C
Name	Extras	Extras Payment
Extras Payment	Highchair x3, Wi-Fi x1, Flowers x3	£45 / £45

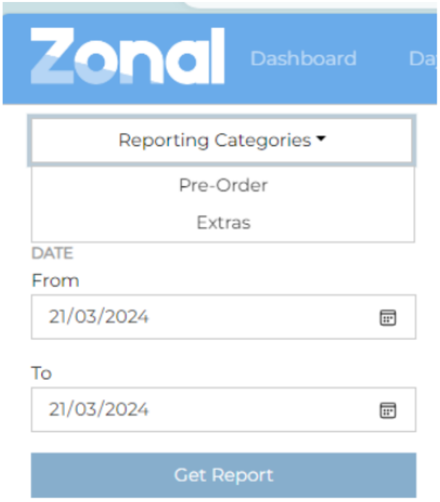
Chef Report

However, our biggest reporting change has to do with the Chef Report, as we have introduced a completely new view of it focused only on the Extras.

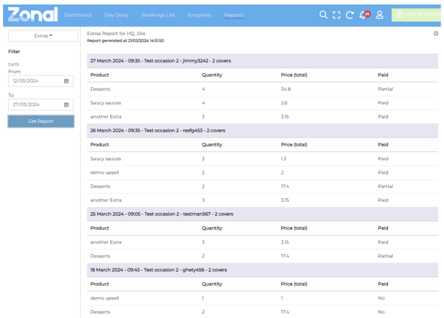
Firstly, you will notice there is a new dropdown "Reporting Categories" available in the Chef Report:



If you click it, you will see an option to select "Pre-order" and "Extras":



You can select "Pre-order" to view the classic Chef Report. However, if you click on "Extras" you will see a report split up by individual bookings (make sure to select an appropriate date range!):



On this report you will be able to see:

- Product - that's our Extras' name
- Quantity for any given Extra
- Price - sum of the total payment required for any given Extra
- Paid - here we have 3 statuses:
    - Paid - when an Extra has been fully paid for
    - Partial - when an Extra's payment value has not been met
    - No - when no money has been allocated to any given Extra

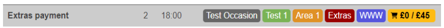
3. Tables Host

Just like Events Host, the Tables Host users will now be able to override any Extras quantity selection requirements. This is to enable Hosts to further create a more bespoke events for their guests.

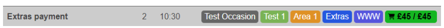
a. Payment Requirements

Similarly to Events Host app, Tables will now showcase Extras payments requirements via user pills.

When Extras are unpaid, the "Extras" pill will be red, while the Extras payment icon will be yellow showcasing the amount to be paid against a total value of the Extras:



Once the Extras are paid for, then the "Extras" pill will turn blue, while the while the Extras payment icon will turn green showing the full value of the Extras for the booking:

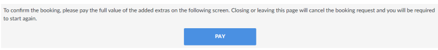


4. Booking Widget

Guest users are now able to complete their Extras payments in the Booking Widget. To accommodate for that, we have made some minor changes to the wording of the payment message, as well as, we renamed the "Pay Deposit" button to simply "Pay". Please see below the scenarios with different texts:

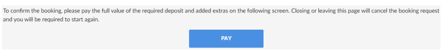
a. Extras only:

When a Guest user is required to pay only for the Extras, they will see the below text:



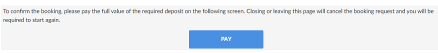
b. Extras and deposit

When a Guest user is required to pay for the Extras and a deposit, they will see the below text:



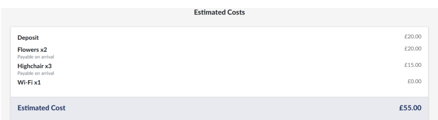
c. Deposit only

When a Guest user is required to pay only for the Deposit, they will see the below text:



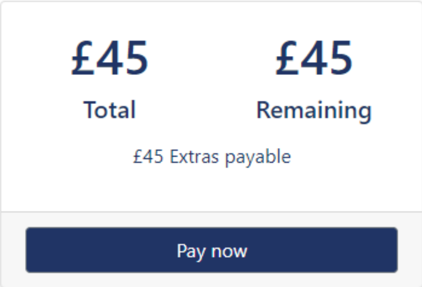
d. Extras added but not payable during the journey

The last scenario is slightly different, in case a Guest user adds Extras but is not required to pay for them they will see a small text on the Estimated Cost screen saying "Payable on arrival" for each Extra, while the "Pay" button will instead say "Book Your Event".

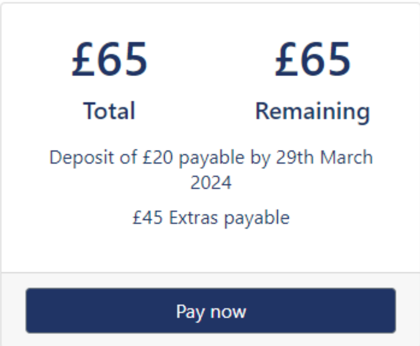


5. Guest Portal

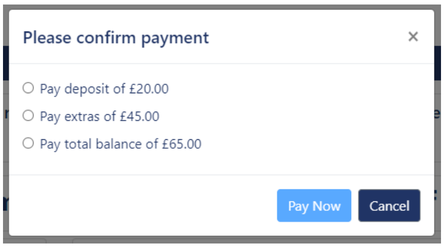
Guest users will now be able to pay for Extras via the Guest Portal when the "Require extras payment" action is triggered. The Extras' value will be visible in the payment box, clearly stating what the monetary requirement is for:



In case, where a deposit is also payable, the Guest user will be able to select what they would like to pay for. We hope that this will improve user experience with the Guest Portal:



Once they click "Pay now", they will see a pop-out where they can choose the specific requirement to pay for:



Please note - only the lead guest will be able to complete the Extras payment requirement.

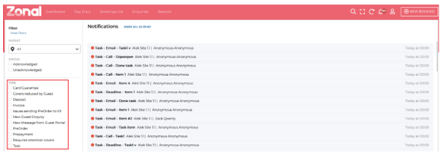
[Events] - Host - Notification Improvements- PPL-1204

The aim of this feature is to improve the user experience on the notifications page with filtering options.

We hope this will ensure that Host users are able to get the desired information as easily as possible and be able to focus on their operations. To enable users to do it we added filters to the notifications that will allow users to specify the information they are searching for.

Please see the filters below:

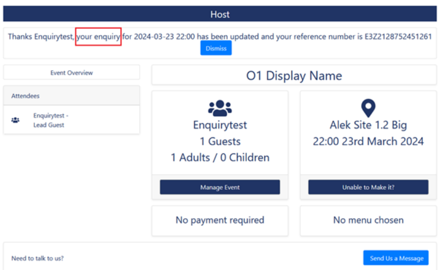
- Card Guarantee
- Covers reduced by Guest.
- Deposit
- Invoice
- Issues sending PreOrder to till.
- New Guest Enquiry
- New Message from Guest Portal
- PreOrder
- Prepayment
- Requires attention covers.
- Task



[Guest Portal] Adapt information for enquiry on Guest Portal- PPL-1225

The aim of this change request is to rename the message displayed on the guest portal when enquiries are updated.

The current message was containing the word ‘Booking’ instead of enquiry which could confuse users ahead of their enquiry being accepted. Therefore, the wording has been changed to ‘enquiry.’



[Tables] - Host - Do not unseat Bookings when edited - PPL-1236

With this feature we continue to make Tables' editing of bookings more intuitive.

In a high paced environment change to covers on a table happen rather often, which in itself might be a headache for the Hosts. If you add to it a system that also unseats a booking from their current table, that only compounds the issue!

As we continue to make Tables editing journey more intuitive through incremental changes, we had a look at the very issue described above. Tables would unseat a booking when a Host would edit the covers, it did it in order to try and maximise the occupancy of tables. However, in reality it only made Hosts' jobs even more difficult, as it would introduce a variable that not many users knew about.

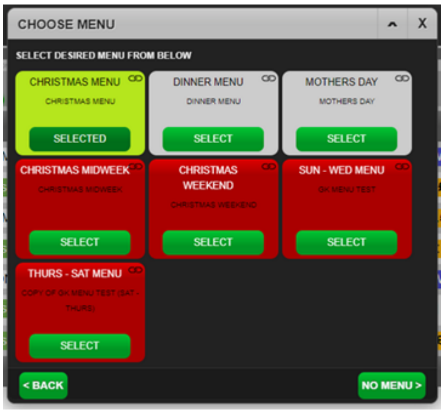
With this feature, we disabled that function so that when a Hosts edits the covers associated with a booking, said booking is no longer unseated. It will remain on the seated table and the system will put trust in the Host and their capability to manage the site.

> **Please note - this is for "seated" status in Tables, not "assigned".**

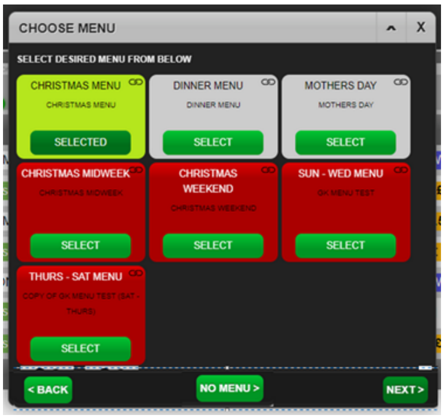
[Tables] Host - Move the 'no menu' button and add 'Next' button to reduce errors - PPL-1223

The aim of this change request is to move the ‘no menu’ button on the Tables application to reduce the human error.

Previously the Tables editing flow could be a bit inconsistent with button placement, which could cause users to deselect a menu accidentally leading to a lost pre-order and further issues down the line.



With this release, as shown below, the ‘NEXT’ button was replaced by the ‘No Menu’ button when the Tables user was editing/updating a booking and the ‘No Menu’ button was moved to the middle of page:



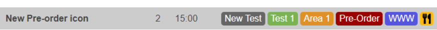
[Tables] to update Pre-Order 'pill' to green when complete - PPL-859

This feature brings Tables in line with Events UI standards.

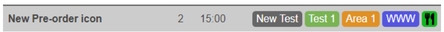
This simple feature brings Tables closer to Events' experience in terms of modern approach to UI. Previously, we've added an icon to signify that the pre-order was started by the Guest users via the Guest Portal. However, this icon would not turn green when the pre-order was completed, leading to possible confusion for the users.

In order to make the information more readily available to Tables Host users we introduced a green version of the icon to appear once the pre-order is completed.

Pre-order started and incomplete:



Pre-order started and complete:



[Tables] - Host - Order & Pay - Change in Functionality - PPL-1205

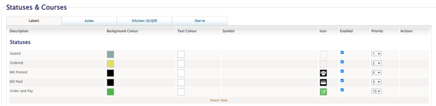
This feature enables the Order & Pay functionality in Tables.

We have now introduced a new Order & Pay functionality in Tables for 3rd party integrated applications. When an order is placed via such app, then Tables will create a view-only walk-in booking, so that the Host users are unable to overbook their site.

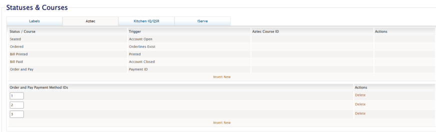
To enable that, certain configuration in Tables is required, please see below:

Brand Level Configuration

Firstly, you will need to enable Order & Pay. You can find that in Tables Brand Admin "Manage Configuration", there you will be able to enable the setting, change icon and colour, as well as priority for Order & Pay bookings:



Next you will need to provide Order and Pay Payment Method IDs so that closed accounts (created for Order & Pay) are fetched correctly. To do that, please navigate to the Aztec tab and enter Method IDs:



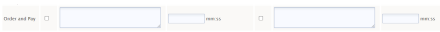
Store Level Configuration

At this point, any other configuration is optional, although it is recommended.

To enable Auto-check out for Order & Pay accounts once they have paid, please head to Site Setup > Preferences Menu, there you will find a setting with a tick-box as showcased below:

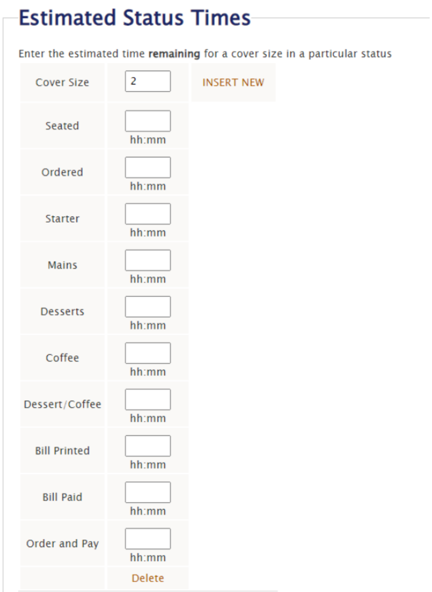
☐ Enable Auto Check out after Order & Pay. Change After (HH:MM:SS)

Furthermore, you will be able to set up alerts for Tables Host users. Navigate to Site Setup > Alerts menu, there you will see configuration relevant to Order & Pay accounts:



Finally, you can set up Status time for Order & Pay. Please note that when an Order & Pay status is present it will be used to estimate the remaining time of the booking, if nothing is specified the default is 2 hours.

In order to customise that status, please head to Site Setup -> Manage Tables > Manage Turn Times > Status Timers. There you will find the relevant input field to amend the time of Order & Pay status:



Please note - if you are running Pay My Bill with Order and Pay in the same venue then Pay My Bill will not show payment status correctly.

Technical Changes

[Tables] - Do not send SMS for imports - PPL-1211

This feature expands the on the new import tool in Events.

With this change the import configuration "Do not send email and SMS communication to Guests". will not send SMS from Tables to newly imported bookings.

Update HTTPS Security Headers (part 1) - PPL-1218

This feature addresses possible issues with security of our platform.

Recent Pen Test results have shown issues with our security and missing HTTPS headers. This work is to address and fix those through the following changes:

- Application of Referrer-Policy Security Header
- Application of Permissions-Policy Security Header
- Application of X-Frame-Options Security Header
- Addition of missing HTTP headers:
    - Strict Transport Security - HSTS
    - Content Security Policy
    - X Frame Options
    - X Content Type Options
    - Referrer Policy
    - Permissions Policy

Bookings - 1.67.0 | 2.67.0

Release Date: Staging 27 February 2024 | Production 12 March 2024

Status: Released to Production

For detailed information on Bookings 1.67.0 (Events) and 2.67.0 (Tables) release please view a section below.

Summary New Features

[Tables] - Host - Payment requirements icons rework - PPL-1212

This feature aligns the way Events and Tables showcase information about completed payments.

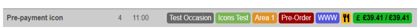
Both Events and Tables showcase payment information through "pills" on each booking. Both of them will show an incomplete payment with a yellow pill. When a payment has been completed, Events will change the colour of the pill to green to signify this, however, in Tables the very same pill will remain yellow. To bring Tables in line with Events and modern UI approach, we have now changed the pills to be green once payment is complete. Please see the list of the pills with example below:

1. Deposit
    a. Unpaid

    b. Paid

2. Pre-payment
    a. Unpaid

    b. Paid



3. Card Guarantee
    a. Details not added

b. Details added

Card guarantee icon	2	15:00	Test Occasion	Icons Test	Area 1	Extras	CG	WWW

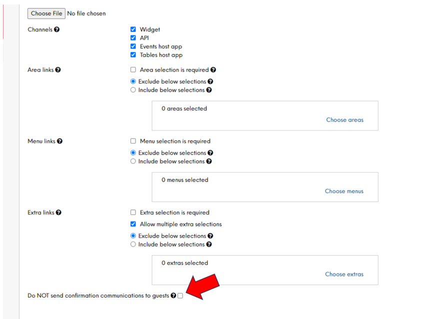
[Events] - Stop Sending Confirmation Bookings by Occasion - PPL-1185

This feature stops confirmation messages, Email & SMS, from being sent out when a booking is made.

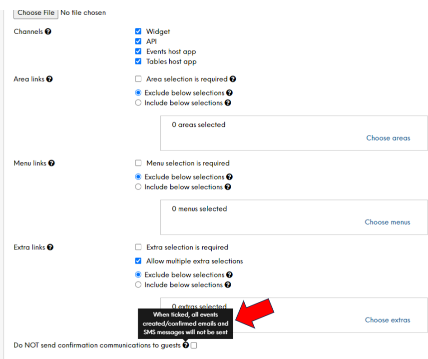
As we explore combining multiple booking journeys into one, for example a hotel room and a table in a restaurant, we decided to add a new customisation setting. This is to reduce the number of messages Guest users would receive in such a unified booking journey.

Events Estate Admin users can now configure each Occasion to send or not send Event Confirmed, Event Created emails, as well as SMS "Confirmed Reservation" & "Event Confirmed" from Tables. We hope to elevate Guest user experience, through a quality of life change, as unnecessary emails and SMS messages are one of the top factors for dissatisfaction with brand's communications.

Below you can see the Occasion configuration screen with the tick-box controlling confirmation communications marked with a red arrow:



As well as the associated user icon:



[Events] - Enquiries - View Rejection and Add 'Lost' as sub status - PPL-870

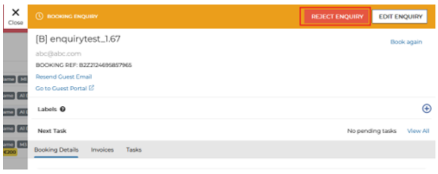
The aim of this feature is to correctly identify and categorise the enquiries. Previously the Enquiry would either be converted into a Booking or Cancelled. With this release we will enhance this feature by introducing better sub categories for Enquiries

Three new / updated sub statuses have been implemented, namely:

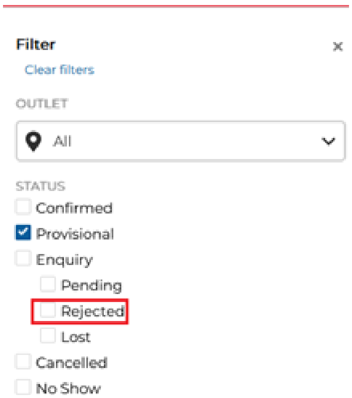
1. Rejected Enquiry (previously this would have been shown as cancelled)
2. Lost Enquiry (new status)
3. Pending Enquiry (existing)

Rejected Enquiry

Rejected status is applied to enquiries which has been 'rejected' by the Host user on the Events Host App, as shown in figure below. This functionality is existing, however, 'rejected' enquiries were being categorized under 'Cancelled' status.



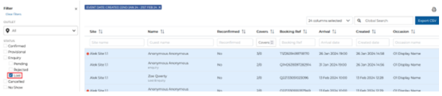
To track 'rejected' enquiries, on the Day Diary, Bookings List & Enquiries pages, a 'rejected' filter has been added to the filtering menu as shown in figure below.



Lost Enquiry

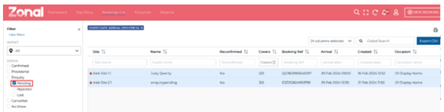
Lost status is applied to enquiries which were not responded / actioned prior to arrival date. The system will automatically categorize such enquiries under 'Lost'.

To track 'Lost' enquiries, on the Day Diary, Bookings List & Enquiries pages, a 'Lost' filter has been added to the filtering menu as shown in the figure below.



Pending Enquiry

Pending status is applied to enquiries which have not been actioned or responded to before the arrival date. The system will automatically categorize such enquiries under 'Pending'. To track 'Pending' enquiries, on the Day Diary, Bookings List & Enquiries pages, a 'Pending' filter has been added to the filtering menu as shown



Technical Changes

Bookings - 1.66.0 | 2.66.0

Release Date: Staging 6 February 2024 | Production 20 February 2024

Status: Released to Production

For detailed information on Bookings 1.66.0 (events) and 2.66.0 (tables) release please view a section below.

Summary New Features

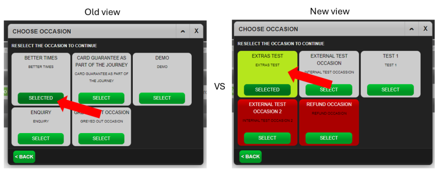
[Tables] - Host - Highlight selected items when editing - PPL-1213

This quality of life feature will allow hosts to quickly distinguish already selected items.

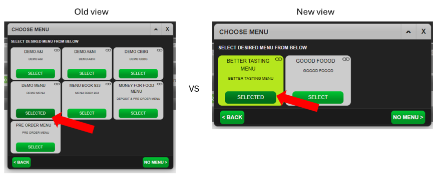
The floor of any site is a chaotic and fast-paced environment where every second counts. That's why with this feature we hope to make Hosts' lives easier by enabling them to quickly distinguish between already selected items when editing any existing booking.

Previously, the selected items would only be marked with "Selected" button, without any other visual cue. To allow for quicker service and decision-making, we have now added an additional green background to items already selected.

1. Occasion selection

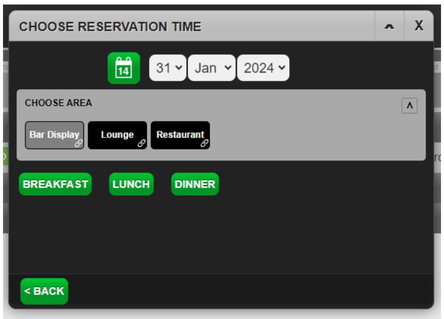


2. Menu selection



3. Timeslot selection

When it comes to the timeslot selection, we made an additional change. Previously, when user landed on timeslot selection screen, the currently selected session would not be automatically opened and so timeslot would not be visible.

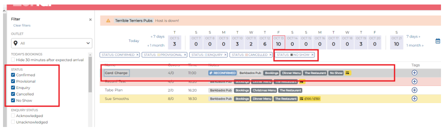


Now, when user lands on this screen the session will be opened and highlighted automatically to ensure that the Host doesn't need to hectically look for it:

Events - Booking List to include 'No Shows' as a filter option - PPL-1201

This feature expands the reporting functionality in Events.

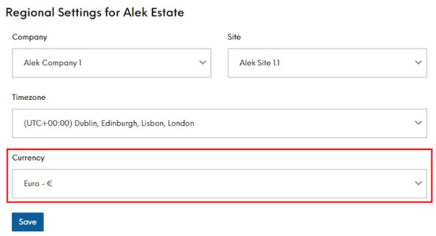
To ensure that we provide as much relevant information as possible to the Events users we have now added a new filter option "No Shows" for the Host app's Booking List. We hope that this will help our customers better understand the no-show trends and limit their impact on their business.



[Events] - Bookings to allow multiple Currencies - PPL-1063

The aim of this feature is to apply the correct currency information for Zonal’s international customer in order to minimize the confusion for their customers when viewing and paying for their bookings online.

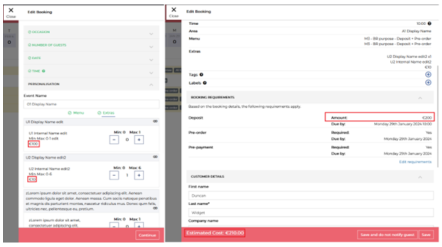
The first step is to select the currency which will be applicable to the site. As shown below on Zonal Admin, under ‘Regional Settings’, a new field called ‘Currency’ is added. On click, the currency drop down list appears, and the user can choose between 3 main currencies, namely, EURO, POUNDS, DOLLARS.



Once the currency has been selected and applied to the site, the currency symbol is applied to all applications, namely, Events Host, Guest Portal, Tables, Widget, External API.

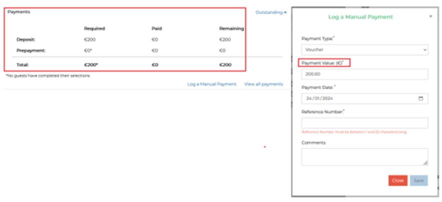
Event Host > Booking Journey

As shown below, on Events Host application, the booking journey contains the currency symbol for Extras and any requirements where prices are displayed.



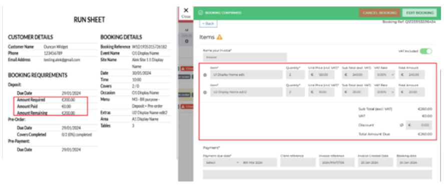
Event Host > Payments

The payment sections are also updated to show the correct currency as shown below:



Event Host > Central Reservations functionality

Functionalities falling under the Central Reservations umbrella adapts to the currency selection such Run Sheet & Invoices.

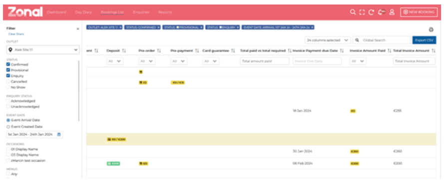


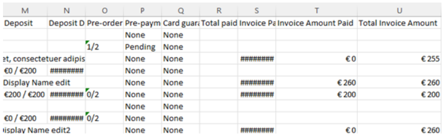
Event Host > Day Diary / Bookings List / Enquiries / Notifications

All pages on Events Host app are adapted to show the selected currency as shown in screens below:

- Day Diary:

- Bookings List including Print & Export CSV



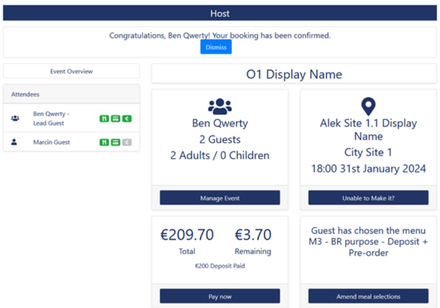


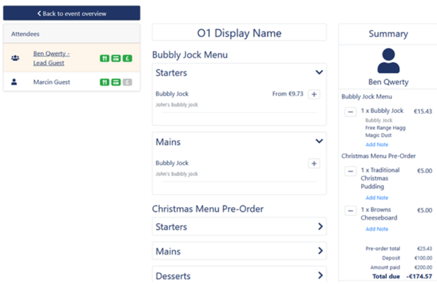
M	N	O	P	Q	R	S	T	U
Deposit	Deposit D	Pre-order	Pre-paym	Card guar	Total paid	Invoice Pa	Invoice Amount Paid	Total Invoice Amount
			None	None				
		1/2	Pending	None				
et, consectetuer adipis			None	None		########	€ 0	€ 255
€0 / €200	########		None	None				
Display Name edit			None	None		########	€ 260	€ 260
€200 / €200	########	0/2	None	None		########	€ 200	€ 200
			None	None				
€0 / €200	########	0/2	None	None				
isplay Name edit2			None	None		########	€ 0	€ 260

- Notifications

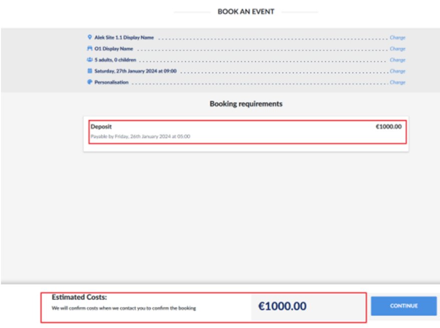
Guest Portal

As shown below, the guest portal also displays the selected currency for both payments and pre-order:



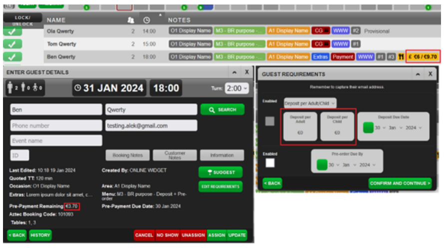


Booking Widget



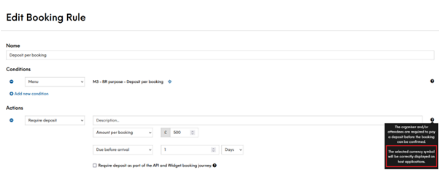
Tables Host app

Along with Events Host App, the Tables application is also configured as per the selected currency as shown:



Events Estate Admin

However, on Zonal Estate Admin, currency was not implemented due the global view of all sites on the page. Therefore, in the tooltip, the message, "The selected currency symbol will be correctly displayed on host applications" was added in the tooltip on Booking Rules & Extras, as shown:



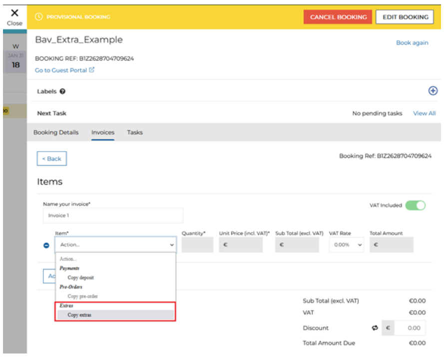
Conditions for currency selection:

- No FX logic is applied. This change is only a UI change.
- Zonal Events Estate is not impacted by this change.
- By default, the currency is set as Pound Sterling
- The selected currency symbol is applied to all bookings (past, present, and future).
- On the External API, the outlet endpoint is updated, and the currency name is shown – GBP/USD/EUR
- Multi-site users will see bookings with different currency symbols on Events Host app (if they are configured differently)

[Events] - Link Extras to Invoices - PPL-1194

The aim of this feature allows Host app users to copy Extras automatically on an invoice in order to improve operational efficiency.

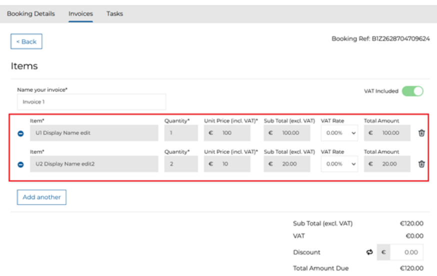
Once the host users have selected some Extras on the booking journey, they are able to generate and issue an invoice with selected Extras. Host users can add & remove Extras on the invoice using the existing functionality. The host app user clicks on the [+] icon and in the dropdown menu, 'copy extras' is displayed:



After selecting 'copy extras', the system automatically pre-populates the following fields with data from the booking:

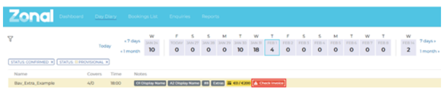
- Item name
- Quantity
- Unit Price

As seen below:

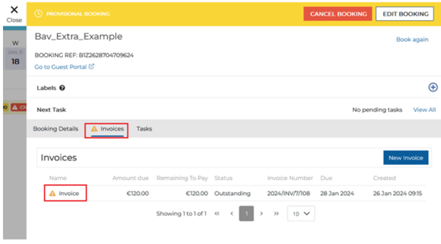


The Sub-total and total amount fields are automatically calculated, and the user is only required to choose the correct VAT rate for this item.

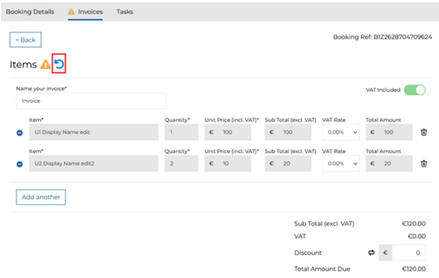
If there the Extras on the booking have been edited, removed or if the booking has been cancelled, the system notifies the Host app user on the booking panel to check the invoice:

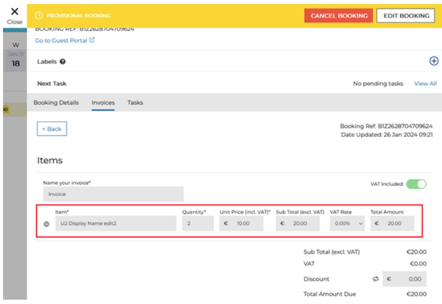


An alert is also displayed on the invoice tab and the invoice itself:



After the user clicks on ‘Edit Invoice’ and refreshes the invoice, all copied Extras related to the booking is updated / removed as shown:





Conditions for linking Extras to an invoice:

- The booking must contain Extras.
- Once Extras are copied onto an invoice, it cannot be copied on another invoice.
- Enabled only for VAT included calculation method.
- If an invoice containing copied Extras is cancelled, a snapshot of the items remains on the invoice, but the Extras link is broken. The user can create another invoice and copy extras.
- An alert is also displayed on the ‘Booking List’ under ‘Invoice reference number’ when a change has been made to the existing copied Extras

Technical Changes

Bookings - 1.65.0 | 2.65.0

Release Date: Staging 9 January 2024 | Production 23 January 2024

Status: Released to Staging

For detailed information on Bookings 1.65.0 (events) and 2.65.0 (tables) release please view a section below.

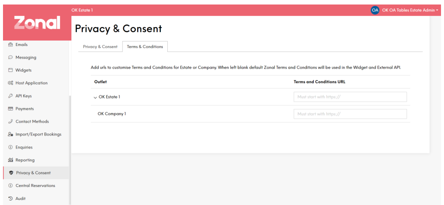
Summary New Features

[Events] - Admin - Update to Terms and Conditions Statement - PPL-871

This feature allows users Admin users to insert a link for customer terms and conditions statement at Estate or Company level.

We realise that our generic terms and conditions statement might not be perfectly suited to a vast variety of businesses we serve. As such, we introduced an ability for Events Estate Admins to add a custom link that will replace the default terms and conditions in the Booking Widget and External API.

Please see below the new tab that was added to Privacy & Consent space in Events Estate Admin app:

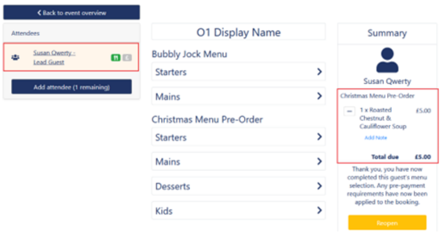


Please note: When the above fields are left blank, then the existing default Zonal Terms and Conditions will be used in the Widget and External API.

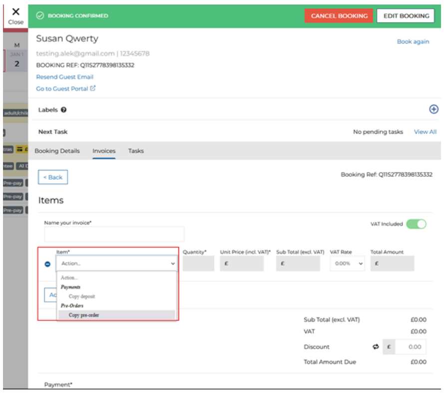
[Events] [Central Reservations] - Link Pre-Order to Invoice - PPL-1026

The aim of this feature is to ensure that any pre-order on the booking is automatically populated on the invoice so that the user does not need to manually insert them.

Once, Guest Portal users have placed their orders, host users are able to generate and issue an invoice with selected pre-orders.



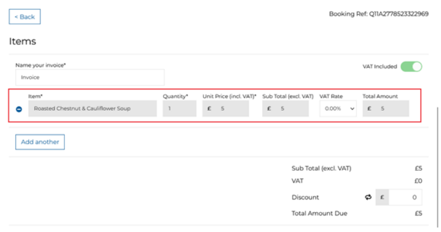
As shown below, Host app users can add & remove preorders on the invoice using the existing functionality. The Host app user clicks on the [+] icon and in the dropdown menu, ‘copy pre-order’ is displayed.



After selecting ‘copy pre-order’, the system automatically pre-fills the following fields with data from pre-order, illustrated below:

Pre-filled fields are:

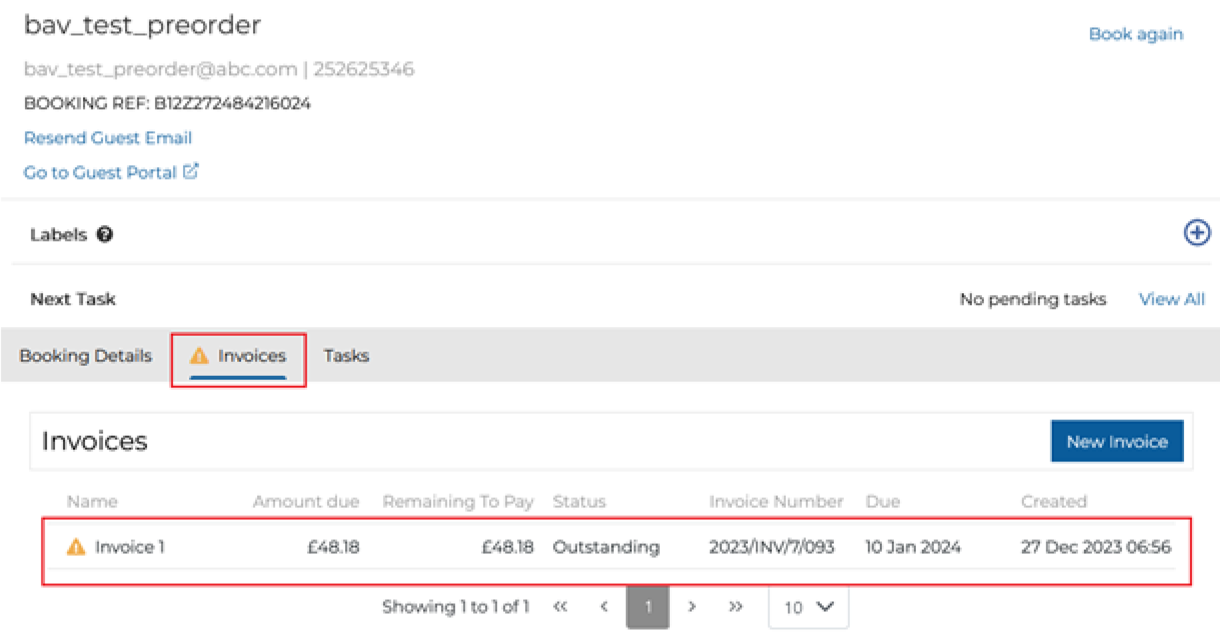
- Item name
- Quantity
- Unit Price



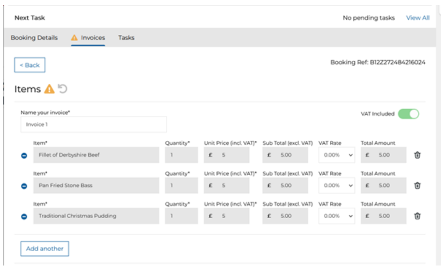
The Sub-total and total amount fields are automatically calculated, and the user is only required to choose the correct VAT rate for this item.

If there is a change in pre-order menu, guests have been removed or the booking has been cancelled, the system notifies the Host app user on the booking panel to check the invoice:

An alert is also displayed on the invoice tab and the invoice itself:



After the user clicks on 'Edit Invoice' and refreshes the invoice, all preorder item related to the guest/booking is removed as shown:



Conditions for linking pre-orders to an invoice:

- The booking must contain pre-order requirement.
- Once a pre-order is copied onto an invoice, it cannot be copied on another invoice.
- Only 'complete order' pre-orders are copied on to the invoice. Pre-orders that are 'saved for later' are not copied.
- Enabled only for VAT included calculation method.
- If an invoice containing copied pre-orders is cancelled, a snapshot of the items remains on the invoice, but the pre-orders link is broken. The user can create another invoice and copy the pre-orders.
- An alert is also displayed on the 'Booking List' under 'Invoice reference number' when a change has been made to the existing copied pre-orders.

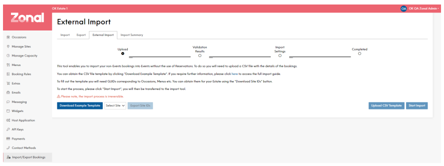
[Events] - Zonal Admin - Events Bookings Import Tool - PPL-783

We are bringing a new way to upload external bookings into Events.

As we capture new market and onboard new customers we spend a lot of time moving their bookings into Events and Tables. This is because our previous import tool was limited in its functionality, as it required the new bookings to be first imported into Reservations format, before it could change them into Events' bookings. We hope to address this shortcoming with this feature, as we will now enable Zonal Admin users to upload external bookings into Events. It is hoped that in the future this feature will be enabled for Estate Admins as well, so that it becomes a self-service tool for the users to take off the workload from Zonal teams.

This tool is available in Import / Export Bookings tab under "Import External" sub-tab. Below we will outline the process, however, a comprehensive guide will be available for the users as well.

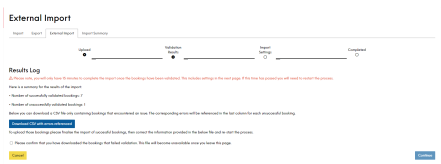
1. Landing page and the first step of the import process.



Here users are able to complete the initial actions of the process:

- "Download Example Template" - allows user to download an empty upload template which outlines data that needs to be supplied in order to import a booking.
- "Select site" - to start the process user will need to select which site they wish to upload to. When user clicks on this dropdown, a search bar will open allowing them to conveniently look for a specific site.
- "Export site IDs" - this button will become clickable once user has selected a site. Once clicked on it exports all necessary GUIDs for the selected site - Occasions, Menus, Areas - in an easy to read CSV format.
- "Upload CSV template" - allows user to select a CSV file from their local storage. Once uploaded, the name of the file will appear on the left from the button, confirming correct upload. Please note that the import tool will not accept any other file format than CSV.
- "Start Import" - once user has selected the site and uploaded the CSV import template, then this button will become clickable. Clicking it will begin the import process and transfer the user to a loading screen while the import's data is being validated.

2. Results log

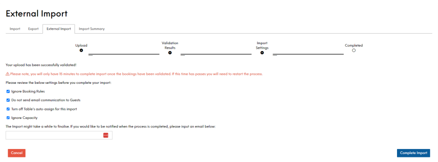


Once the import has gone through the validation, the results will be displayed on this screen. User will be able to see the number of successfully and unsuccessfully validated bookings. Conveniently, by clicking "Download CSV with errors referenced" user can also download the failed bookings in a handy CSV file containing only the unsuccessful ones, so that they can be corrected and re-uploaded at a later time. However, user will be able to proceed with the successful bookings.

Because the failed bookings are kept in Events' cache, they will not be available once user leaves this screen. Therefore, you will need to confirm their download with a manual tickbox. Only then will you be able to proceed with import by clicking the "Continue" button.

> **Please note: In order to ensure that Events is not overwhelmed by the amount of data uploaded at any point, from this screen onwards you will have 15 minutes to finalise the import. This does not include the time required for Events to actually create the bookings.**
>
>

3. Admin page



Here users will be able to customise their import by selecting the below settings:

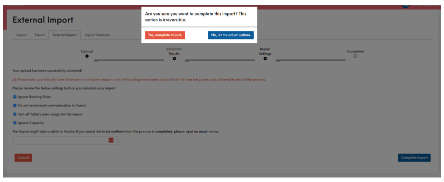
- "Ignore Booking Rules"
    - If ticked (ON), then the new bookings will not send any of the initial email communications to newly added guests.
    - If un-ticked (OFF), then the import will respect any booking rules that might have been triggered
- "Do not send email communication to Guests"
    - If ticked (ON), then the new bookings will not send any comms to newly added guests
    - If un-ticked (OFF), then the new bookings will send respective email communications to newly added guests.

> **Please note - this setting works only for emails in Events, to ensure that SMS communications are not send out, you will need to turn them off in Tables.**

- "Turn off Table's auto-assign for this import"
    - If ticked (ON), then this setting will overwrite Tables' auto assign functionality so that users are not automatically assigned tables
    - If un-ticked (OFF), then this setting will respect Tables' auto assign functionality - it's important to mention that this setting being off doesn't automatically turn on the setting in Tables but simply respects it if it is set to ON
- "Ignore Capacity"
    - If ticked (ON), then this setting will ignore any capacity constraints for the new bookings
    - If un-ticked (OFF), then this setting will respect available capacity for the new bookings

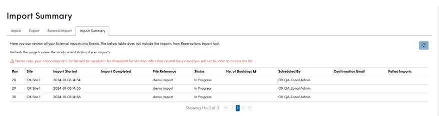
Additionally, the user, if they choose to do so, can input an email to receive a confirmation of import completion. This is not a mandatory field and so can be left empty.

Finally, in order to finalise the process user will need to click on "Complete Import" button and confirming by clicking on "Yes, complete import" on the pop-out that follows:



User is then transferred to the import summary tab.

4. Import Summary page



This sub-tab contains summary of all previous and ongoing imports in an easy to read table format. It is accessible at any point from the Import / Export Bookings tab.

Please see explanation of each of the columns below:

- Run - numerical value, unique number of each import in rising order.
- Site - shows the name of the site to which the import was done.
- Import started - gives the date + time of when the import began (time and date when user clicked "Complete Import").
- Import completed - gives the date + time of when the import finished. The text in the cell will only appear once import is complete.
- File Reference - name of the uploaded file.
- Status
    - In Progress - shown when the import is still ongoing
    - Completed - shown when the import is completed
    - Partially Completed - shown when the import has failed after validation (for example: original user has completed the validation step, in the meantime other user has removed a valid GUID for the import by deleting an Occasion, then the original user attempts to complete the import against an invalid GUIDs. In such scenario Events will import the Bookings that have not encountered an error and allow the user to download the failed ones in a separate CSV file under "Failed Imports").
- No. of bookings - number of successfully imported bookings
- Scheduled by - name of the user who completed the process.
- Confirmation email - email that was input into the field on the previous screen. If there was no input, then nothing will show in this cell.
- Failed Imports - shown for imports that are in status "Partially Completed", remains active for 90 days from "Import Completed" date. Once user clicks on it, then a download starts with a file with failed imports ONLY.

[Events] - Extras (Upsells) Ability to add multiples as requirements on bookings - PPL-865

This feature reworks the "Upsells" into "Extras", while expanding on Upsells' existing functionality.

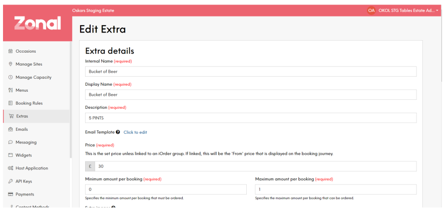
Upsells have long existed in Events, however, their functionality was rather limited and so provided little use to most users. We realise that impulse purchases can be a great additional revenue stream for any business.Therefore, with this release we focused on making Extras more flexible so that we can more easily capture those purchases from Guests while they make a booking, not to mention the expanded ability for sites and Guests to customise any booking.

This rework has been split up into two parts, in order to be more manageable. Phase 1 consists of the functionality described below.

Firstly, we renamed "Upsells" to "Extras" in all front-end or guest facing screens. This is to ensure that there is no negative connotation some customers might have with the word "Upsell", as it can be seen as solicitation.

> **Please note - in all back-end code "Extras" are still named "Upsells"**

Our next step was to allow Events Estate Admins to set up minimum and maximum amounts of any Extra per booking:

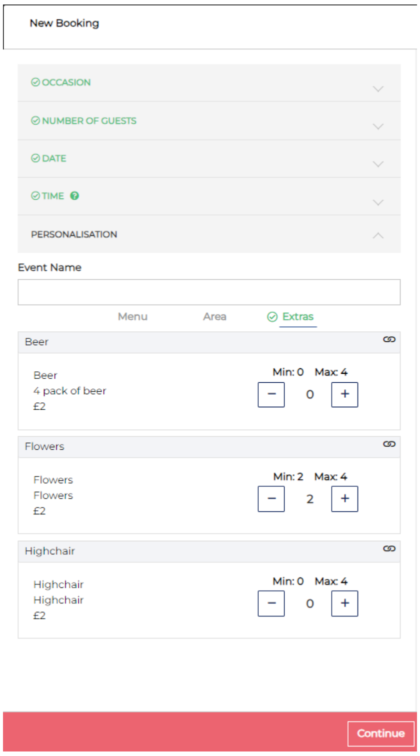


As we can see, users can set up the minimum value for any Extra, which will be added to any booking where the given Extra is available. Estate Admins can also specify the maximum amount, so that guests will be unable to select more than that. Please see the requirements for the fields below:

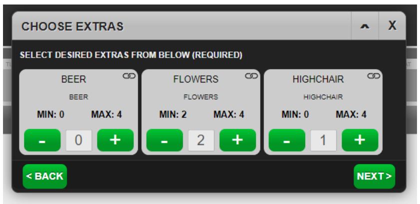
- 0 is the default for minimum amount field for any existing Extras
- Minimum value of 1 for the maximum amount field, with error message appearing if 0 is selected
- Only numerical values accepted, with an increment of 1
- Those fields are mandatory and the page cannot be saved without anything in them, with error appearing if left empty
- All currently existing Extras will be updated to have a default value of 1 as the Maximum amount.

To make most use out of this new functionality, we now allow to add multiples of any available Extras via all booking channels, as seen below:

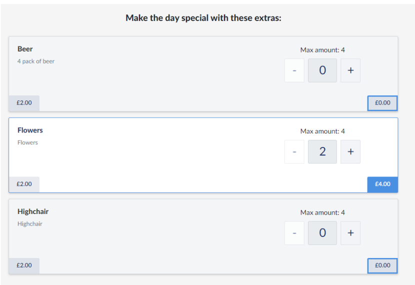
- Events Host app



- Tables Host app



- Booking Widget



- External API

Please note: Extras' payment functionality will be added in Phase 2 of this feature in 1.66 Release later this year.

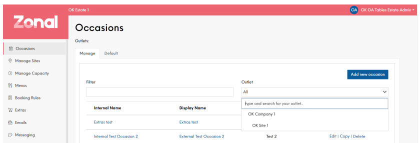
[Events] - Admin - Add search Filter to Site Drop Downs to Events Admin app - PPL-1208

This feature allows users to more conveniently filter information available in Events Admin tabs.

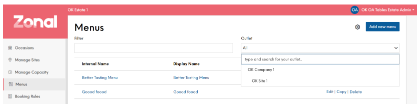
Because time is key in our industry we have introduced this quality of life change, whichbrings functionality previously available only in the Outlets search bar in Manage Capacity tab to the following tabs: Occasions, Menus, Widget, Host Application, API Keys and Extras. We hope that this will make setting up your Companies and Sites easier as you will be able to directly type in, search for and thus filter the page with wanted outlets.

Below you can see the new search bars added to the aforementioned tabs.

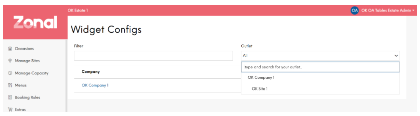
- Occasions tab outlet



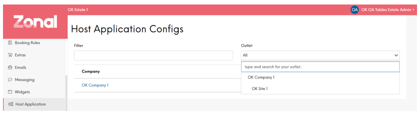
- Menu's tab outlet



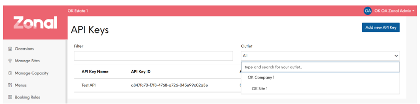
- Widget tab Outlet:



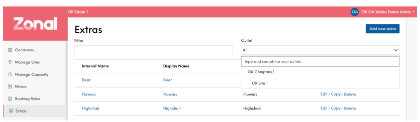
- Host Application tab outlet



- API Keys outlet



- Extras tab outlet



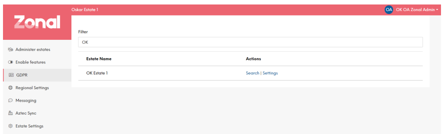
Technical Changes

[Events] - GDPR Anonymisation Schedule - PPL-1167

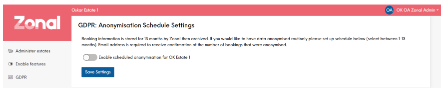
This feature moved anonymisation settings from Reservations to Events.

As part of deprecating Reservations we have now moved anonymisation schedule settings to Events.

It can be found under "Action" column in GDPR settings, after clicking on "Settings"



Schedule settings:



[Events] - Extend Events API end points to return detailed site availability - PPL-1136

This feature created a new endpoint exposed via InternalSaasServicesApiController allowing for more detailed availability API calls.

We have expanded the data contract for our External API calls in order to provide more relevant information to the users. Additionally, we optimised MySQL queries to ensure speed of data searching.

Response Data Contract will now include:

- Date - Requested date should be present in the response
- StoreConfiguration info should be present in the response in form
  - storeId
  - timeZone
  - coverSizeCapacityLimitEnabled
  - reservationFutureMaxDays (defaults to 60 if not set)
  - autoTableAssigEnabled
  - bookableAreasEnabled

- capacityGroups (all cg info)
- tablePlans (all tables plans relevant to the slots returned)
- tableTurns (all table turns including capacity group turn times if they exist)

- SlotData
- Tables
- Table Joins

[Events] - Admin - Auto Fill Surname when Migrating bookings from Reservations to Events - PPL-1209

This feature brings a quality of life change to our existing import tool.

When migrating bookings from Reservations to Events, a lot of imports would fail as no surname would be provided in Reservations. This is because Events treats surname as a mandatory field and would refuse any booking that did not have it.

In such a situation, from now on during Reservations to Events import, the tool will substitute this empty field with "No Last Name" text, so that the import succeeds. We hope that this small adjustment will help resolve most of the issues we had with the existing tool, while we continue working on the new import tool released in this patch.

Bookings - 1.64.0 | 2.64.0

Release Date: Staging 7 November 2023 | Production 21 November 2023

Status: Released to Production

For detailed information on Bookings 1.64.0 (Events) and 2.64.0 (Tables) release please view a section below.

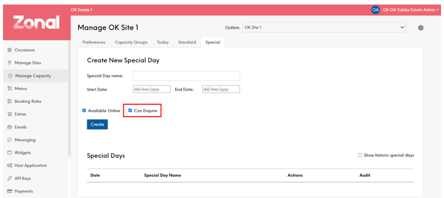
Summary New Features

[Events] - Admin - Can enquire on special days - PPL-1175

This feature focuses on making special days quicker to set up.

When creating a Special Day, users can conveniently specify if all timeslots on a special day are "Available Online" with a tick box. However, when it comes to enquiry settings, users have to manually select and deselect each timeslot on a given day.

This features brings the "Available Online" setting to Special Days Enquiries - once this box is selected, then the chosen setting will apply to all timeslots on a given day. New setting visible in red in the screen shot below:

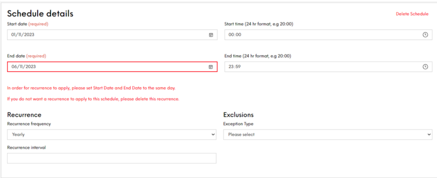


[Events] - Admin - Tooltips for Occasion and Menu scheduling - PPL886

This feature will assist the Events Admin user with greater information on how to set up a schedule on the Occasion or Menu.

When creating Schedules on the Occasion or the Menu, the user will be given additional information on screen to assist with ensuring it is created correctly. This will include not allowing the user to create an invalid set up.

For example, if the user creates a schedule, populates the Start and End dates with different dates. Then select a recurrence frequency the user will see a message to indicate that you should not have different dates on the schedule.

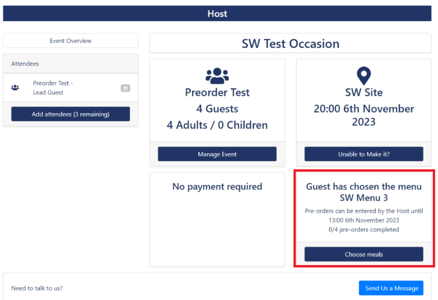


[Events] - Host - Guest Portal Pre-Order due message updates - PPL1198

This feature will assist with the Host clearly knowing which pre-order cut off date they are viewing.

The host will clearly see in the Guest Portal for whom the Pre-Order cut off date is applicable. This will ensure the host does not mix up the Guest and Admin cut off times when viewing information.

The message previously was 'You have chosen the menu 'menu name' Pre-orders required by 'date and time'. This was causing confusion as the Host could read this as the guest cut off, when actually this is the Host cut off (as they are viewing as the Host). The updated message will read, Guest has chosen the menu 'menu name' Pre-Order can be entered by the host until 'date and time':

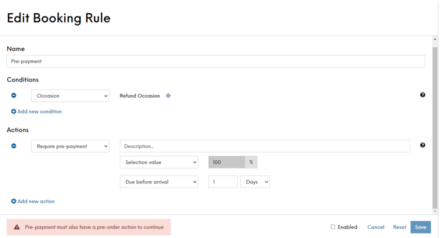


[Events] - Admin - Booking Rules - Pre-Payment requires Pre-Order - PPL-879

This features makes pre-payment requirement un-selectable without a Pre-order requirement.

Having a pre-payment requirement without a pre-order requirement makes pre-payment redundant. As such, from now on when 'pre payment' action is selected as a booking rule, then pre order must also be selected.

When user attempts to add a pre-payment action without pre-order action, then they will be unable to save the booking rule, as seen below:



It is worth noting is that pre-order action does not require a pre-payment action.

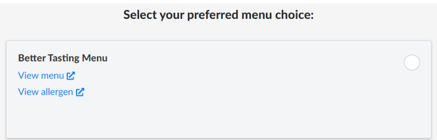
[Events] - Widget - Show Allergen Info - PPL-1114

This feature makes allergen link visible in the Booking Widget.

Guest will be able to view a link which they can click to go to view the allergen information for that site. This will improve the guest journey being able to view this information whilst making the booking.

This link could already have been made visible in the Guest Portal by triggering specific settings in Events - Admin app - Menu settings:

Now, once a link is input into this field it will automatically become visible in the Booking Widget, as seen below:



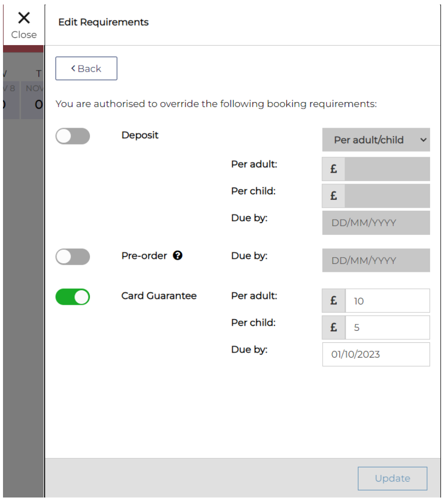
[Events] - Host - Hosts have the ability to add a Card Guarantee Requirement to a booking - PPL-1165

This feature allows the Hosts to add a Card Guarantee requirement to any booking.

Previously Hosts were able to add Deposit and Pre-order requirements to any booking. This could be done regardless of any booking rules that would apply to this booking.

We recognise that this is a quite useful ability to create a custom booking requirements for specific bookings. With this feature Host users will now be able to add a Card Guarantee requirement to any booking. This will be only be available for the Events Host, for the Tables Host there will be a new icon to indicate there is a card guarantee.

Events Host view:



Please note: You will not be able to select both Deposit and Card Guarantee requirements. Just like with existing Booking Rules, those requirements are mutually exclusive.
Additionally, if the Deposit has already been paid, you won't be able to change to a Card Guarantee requirements, and vice-versa.

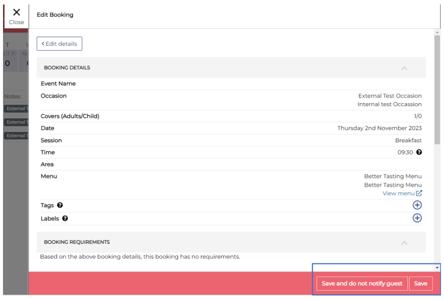
To use this feature, you must have an integration with Braintree in Events.

[Events] - Host - Save booking edits but do not send an update email - PPL-1142

The aim of this feature is to allow Hosts to make changes to the booking details without sending an update email to Guests.

At the moment, when a Host makes a change to a booking and clicks "Save" Events will automatically send out an email. This might compound if the Host is unaware of this or there are a lot of minuscule changes being made often. Moreover, it might lead to annoyance with the brand, as the customer is spammed with unnecessary emails that do not require any action from them.

As such, we've now introduced a new button "Save and do not notify guest" to Events Host app's booking details:



Now the Host user will be able to decided whether to send communication to the Guests, as the 2 save buttons have different functionality:

New "and do not notify guest" button functionality:

- Save changes to the booking
- Do not send any communication to Guest users
- Update the booking log for event update

"Save" functionality:

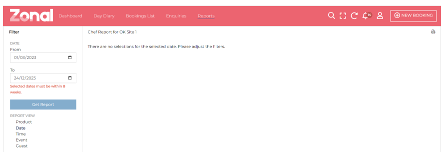
- Save changes to the booking
- Send requirement communication to Guest users
- Update the booking log for event update

[Events] - Host - Chef Report - Extend dates selection for up to 8 weeks - PPL-1172

This feature expands the dates selection in the Chef Report from 4 weeks to 8.

We recognise that reporting periods might be longer than an arbitrary 4 weeks. Therefore, when generating Chef Reports, users will now be able to select date range up to 8 weeks apart.

As seen below, the error message will now trigger when user attempts to generate a report for dates more than 8 weeks apart:

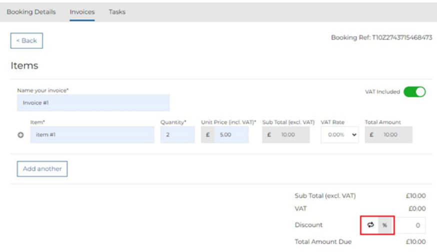


[Events] - Central Reservations - Host - Allow % for discount on invoice - PPL-1090

The aim of this feature is to allow Central Reservations users to apply discounts in percentage on their invoice to enhance the functionality.

In order to make invoices even more customisable and user friendly we now introduced ability for users to apply discounts in percentages rather than absolute numerical values.

As shown below, a new ‘switch’ icon is added on the invoice next to the discount field:



By clicking on the ‘switch’ icon, the user can use two discount methods, namely, either in percentage or full numerical values. On the invoice PDF, the icon also switches based on the selected discount method, as shown:


Invoice #1

Invoice Reference: 2023/INV/1/183
Booking Reference: T10Z27437154668473
Date of Issue: 30/10/2023
Booking Date: 31/10/2023
Date due: 13/11/2023
Client Reference:
Invoice Status: Outstanding

Company Name: Company Name
Registered Address:
Company Number: 12345
VAT Number: VAT1234
Bill To: Address Name

Item	Quantity	Unit price (incl. VAT)	VAT%	Sub Amount (excl. VAT)	Total Amount
item #1	2	£5.00	0%	£10.00	£10.00

Sub Total (excl. VAT):	£10.00
VAT:	£0.00
Discount:	0.00%
Total Amount Due:	£10.00
Amount Paid:	£0.00

Listed below you will find the conditions for percentage discount to be applied correctly:

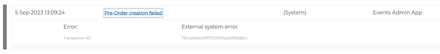
- The maximum % value that can be applied is 100%
- If the user switches to from % to £ discount method, the input box is reverted to a blank field.
- User can change discount methods when editing an invoice.
- Only one type of discount method can be used at once.

Events - Pre-Order errors - Add these to the Events Audit History - PPL-1174

This feature adds new Pre-order errors to the Events Booking Audit History.

Greater detail for the host on the bookings audit page with regards to Pre-Order and error messages. This will enable to Host to know what when wrong and take action quicker.

Previously this would be the error log in the History log, as can be clearly seen it provides very little detail about the problem at hand:



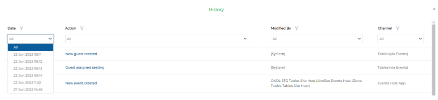
New view in the history log:

[Events & Tables] - Booking's History Filter by Date - PPL-1111 & PPL-1143

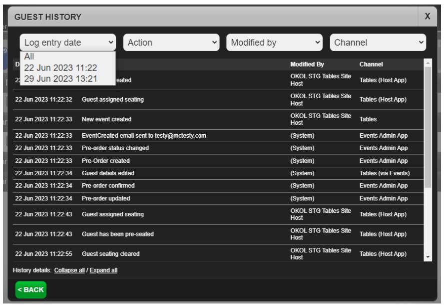
This feature makes Booking History filterable by date rather than date+time.

Previously, the Host user was able to filter booking history by date and very specific time - down to the minute:

- Events:

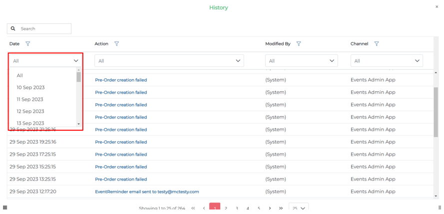


- Tables

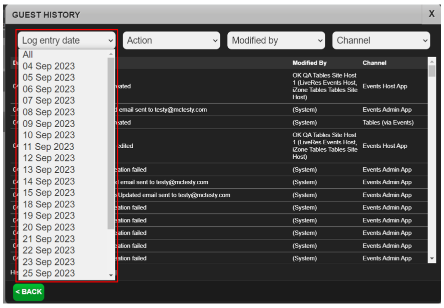


This makes the filter functionality quite redundant, as user has to check each minute log separately without the ability to group them together on one screen. As such, we now simplified the filter functionality from date+time to simply date to make Hosts access to logs easier:

- Events



- Tables



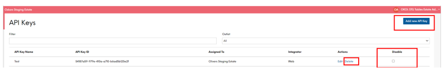
Technical Changes

[Events] - Admin - API Keys access changes - PPL-1164

This change focuses on improving the security aspect of the system.

Customer Admin user will only be able to view and update their API information. Zonal Admin user will be the only users who can create new API keys for customers. This will ensure the security and use of the API is managed correctly.. The access to the below functionality has been disabled (marked in red in the screenshot):

- "Add new API Key" button
- "Delete" action
- "Disable" functionality



Bookings - 1.63.0 | 2.63.0

Release Date: Staging 10 October 2023 | Production 25 October 2023

Status: Released to Production

For detailed information on Bookings 1.63.0 (events) and 2.63.0 (tables)release please view a section below.

Summary New Features

Events - Refunding part Deposit amounts - PPL-1010

The aim of this feature is to allow Hosts to make partial refunds from any deposit transaction.

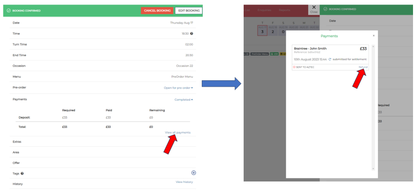
Note: This feature is only currently possible when using Braintree and should not affect / be possible if using other payment providers. The payment status MUST also either be 'Settled' or 'Settling'.

Events Hosts need to have the ability to refund a partial deposit. Previously a Host could only refund the full amount of the payment, thus limiting their flexibility. This could be frustrating to both Host and the Guests leading to a bad customer experience. Let's imagine a scenario where:

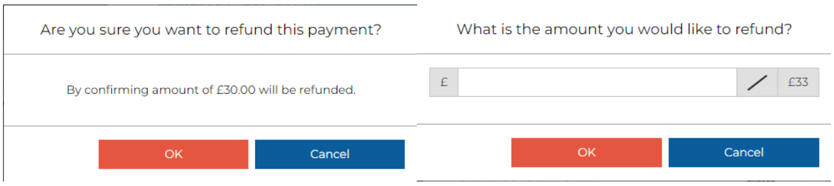
1. The organiser makes a booking for 10 people with £10 per person deposit.
2. They pay a £100 of deposit.
3. Then 2 attendees need to cancel and want a refund of £10 each (£20) total.

With the previous functionality, Host would have to refund the entire transaction and request the Guests to put forward another deposit, which overcomplicates the situation at hand. However, with our new functionality, the Host will be able to input any amount to be refunded from deposit transactions. Steps below outline how a Host can refund part deposit:

1. Just like previously the Host needs to go to booking details
2. open the payments row and click on "View all payments"
3. then click on the "Refund" button:



4. However, this time instead of the old (left) confirmation pop-out, the Host will see a new window where they will be able to input the amount to be refunded:



5. Once the Host inputs the value, which needs to be lower or equal to the value of the deposit, they need hit OK and the action will be complete.

Worth noting are two important requirements for this functionality:

- If a payment comes from non-Braintree transaction, then the partial refunds will not work and a manual payment will be needed in order to provide a refund.
- Refunds can only be issued if the transaction is in "Settling" or "Settled" statuses. It might take up to 24 hours for the status to update as they are part of Braintree's batch transactions.

[Events] - Reconfirm Feature - PPL-1062

This feature introduces the reconfirm functionality to Events and significantly expands on its wider usability.

> ⚠ **Note: For this feature to work correctly the below requirements must be met:**
>
> - **you must have Events**
> - **you must have Events integrated with Tables**
> - **you have the "Reconfirm" feature active in Tables - Brand Settings "Allow Reservations to be Re-Confirmed"**

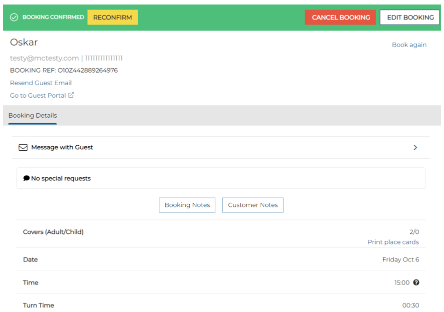
Reconfirmation of bookings has long existed in Tables, however, as part of our effort to maximise the value of available space at each site and minimisation of impact of no-shows we've decided to introduce it to Events as well. However, it's important to mention that "Reconfirmed" is not a new booking status.

There are 3 new channels through which Host and now also Guests can reconfirm their attendance:

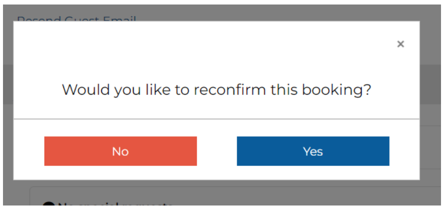
Zonal

1. Events - Host

Once the booking has been marked as confirmed a new button "Reconfirm" is going to appear in bookings details view:

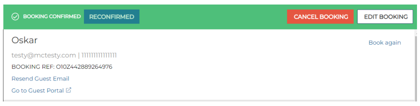


To reconfirm the booking, Host clicks on the button and sees the pop-out asking for confirmation of the action:



If the user clicks "YES":

- They are returned to the detailed view of the booking where the button has changed to "Reconfirmed" and is no longer click-able



- A "Reconfirm" icon is added against the booking

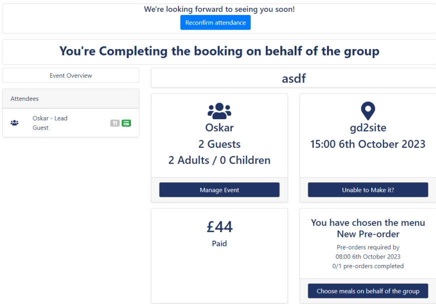
- Guest Portal will no longer show reconfirm button if already reconfirmed in Events by a Host

2. Guest Portal - Lead Guest

Lead Guest will now be able to reconfirm the booking via the Guest Portal, using a new type of banner at the top of the page.

Apart from the standard requirements, for the new banner to appear:

- The booking needs to already be in confirmed status
- There is 5 or less days before the time of the booking. If the booking is made within that 5 day window, the button will appear from the very beginning.



Once the user has clicked the "Reconfirm attendance" button:

- The button will disappear
- The banner will show a thank you message to clarify that the booking has now been reconfirmed and there is no further action needed

- The "Reconfirm" button in Events will be changed to "Reconfirmed" and will no longer be click-able

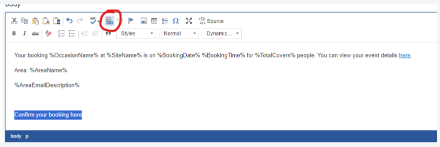
3. Reconfirmation Link - Lead Guest

The final, and optional, channel for reconfirmation is a new dynamic field that can be input into the email templates " %Reconfirm% ".

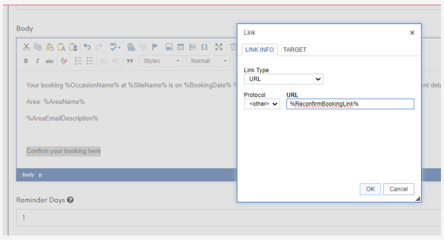
This field will generate a link that, once clicked, will open a new page in a browser, display a thank you message and reconfirm guests' attendance. Once user has clicked on the link, the booking will be reconfirmed and:

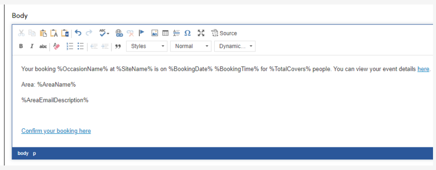
- Guest Portal will no longer show reconfirm button
- The "Reconfirm" button in Events will be changed to "Reconfirmed" and will no longer be click-able

Please note the below steps to hide the URL:
1. Navigate to Event Reminder Email template.
2. Copy out the reconfirm booking link dynamic field - %ReconfirmBookingLink%
3. Highlight the text under which you want to hide the link:



4. Then click the Link icon as highlighted above.
5. Paste %ReconfirmBookingLink% in the URL field.
6. And in the protocol dropdown select “ <other> “. Then click “OK”.





7. Then save your changes.

[Events] [Central Reservations] - Allow users to add payments to invoices in past bookings - PPL-1141

This feature allows users to now log a payment on the invoice even if the booking is in the past.

We realise that invoicing can take place after the date of the booking has passed. That's why we have now allowed to log a payment against expired bookings. The "Log an invoice amount" button is now visible on bookings in the past as well.

Worth mentioning is that we've disabled and hidden the "Log an invoice amount" button for anonymised bookings and invoices.

[Events] [Central Reservations] - Link Booking Deposit & Payments to Invoice- PPL1095

The aim of this feature is to link the booking and the invoice by allowing Events Host users to copy deposit requirements and payments with limited clicks.

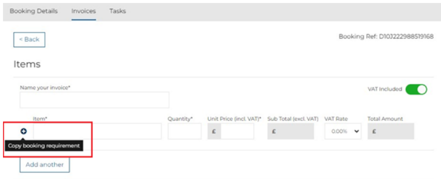
Our efforts to improve the usability of the invoice functionality continues. This time we are looking at making invoice creation flow more naturally, with less clicks and closer connection to existing booking requirements. This will ensure that there is coherence between the data at booking level and created invoices.

The description of this feature is divided into 2 parts in order to more easily cover all functionality.

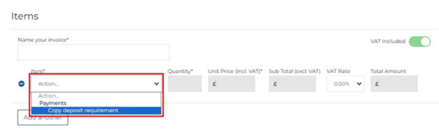
PART 1: COPY DEPOSIT REQUIREMENTS ON TO AN INVOICE

A. Copy Deposit as an item on an invoice

The first step is allowing the of copy deposit amount onto the invoice without having to fill it in manually. As shown below, a new function is added next to each item called 'copy booking requirement':



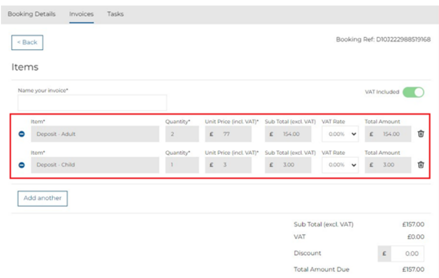
By clicking on the '+' icon, a dropdown is displayed, and the user can select 'copy deposit requirement':



After clicking on 'copy deposit requirement', the deposit requirement found on the booking is added as an item on the invoice. There are two types of deposit items copied:

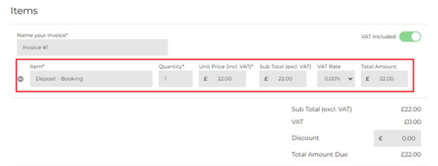
1. Deposit per attendee
2. Deposit per booking

When a booking has a deposit requirement per attendee, two separate item lines are added on the invoice, as illustrated:



For copied deposit requirement on the invoice, the item name, quantity, unit price, sub-total & total amount fields are pre-populated and uneditable.

Similarly, when a deposit requirement is configured per booking, a single item line is added to the invoice with pre-populated data:

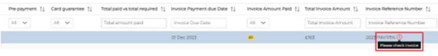


B. Alert when there is a change in deposit amount.

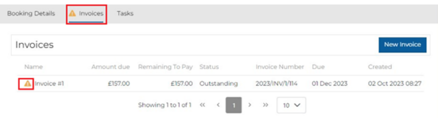
When there is change in deposit requirement made through the Host application, Tables application, Guest Portal & External API and the deposit requirement is linked to an invoice, an error message are thrown to users to action on this.

For example, if there is a change in deposit amount per adult/child, a 'check invoice' icon is shown on the day diary for the booking, as illustrated:

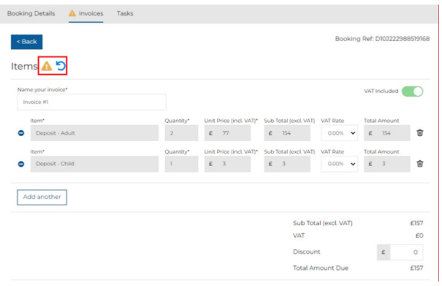
Additionally, on the Booking List, an error icon is displayed next to the invoice reference number of the invoice:



On the invoice, two alerts are displayed on the invoice tab and the invoice list, as shown:



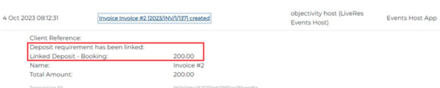
For the alerts to be resolved, the invoice must be updated with the latest data. Host app user navigates to the invoice and edits it. On this page, a warning icon and refresh button is displayed, as shown:



By clicking on the 'refresh' button, the copied deposit items are updated with the latest data and on save, all alerts are resolved.

HISTORY LOG

When the user copies a deposit requirement onto an invoice, an entry is created in the history log to keep track of the deposit links, as shown:



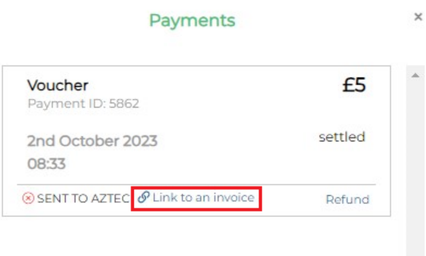
If the copied deposit requirement has been removed / updated, an entry called '{Invoice Name} has been updated' is created in the history log as shown:

Conditions for using copy deposit requirement:

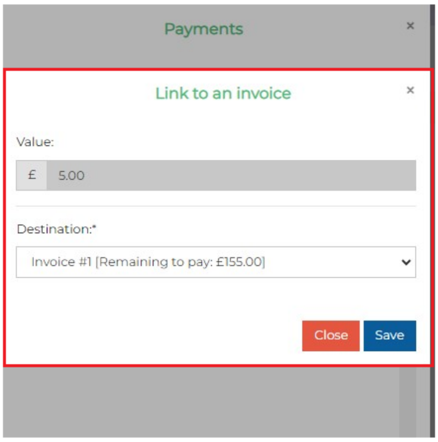
- Copy deposit requirement function is only available when VAT included calculation is selected.
- Copy deposit requirement function can only be copied once on an invoice.
- If a deposit requirement has been copied on an invoice, it cannot be copied on another invoice. First, the user must remove the copied deposit items by using the '-'icon or by clicking on the bin icon.
- If an invoice is cancelled, the deposit link is removed, but deposit items are kept as read only on the invoice. The user can copy deposit requirement to other invoices.
- If an invoice is marked as paid, deposit items cannot be unlinked unless there is a change in deposit requirements on the booking. The invoice is reverted to 'outstanding' status in such as case.
- If a booking is cancelled and the invoice contained copied deposit items, no change is expected. The user is expected to cancel the invoice.

PART 2: LINK PAYMENTS TO AN INVOICE

Another enhancement to the invoice is make sure that payments captured on the booking are allocated to the correct invoice. Hence, a new functionality called 'Link to an invoice' is added on the payment log:

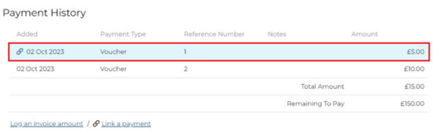


Clicking on the 'link to an invoice' opens on a new popup that allows the user Host user to choose the destination of the payment, as shown:

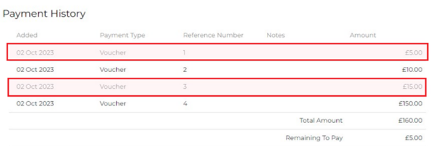


A list of invoices along with their respective remaining to pay values are displayed in the drop-down list. If the remaining to pay value on the invoice is smaller than the payment value being linked, the system displays an error and does not allow the user to proceed with this action.

If the link is successful, the payment is displayed on the invoice in the payment history section, as shown:



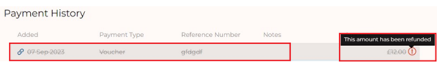
All linked payments are displayed with a blue background and a 'link' icon on the left-hand side. By clicking on the 'Link' icon, the user can unlink the payment on this page itself. Unlinking a payment changes the background of the payment to 'red', as shown:



REFUNDS

When a booking is part-refunded or fully refunded, the system automatically refunds the payment linked to the invoice as well.

If a payment is fully refunded, the payment entry on the invoice is strike-through and the background is colour is set to grey. A tooltip is also added next to the payment value with a hover message:



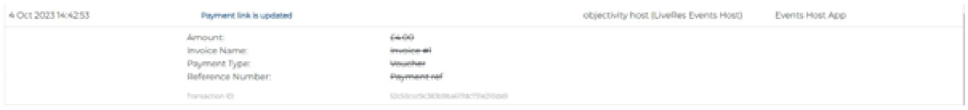
As shown below, if payment is partly refunded on the booking, on the invoice, the payment value for this entry is changed to the orange colour and a tooltip is displayed containing information about the initial amount paid and the amount refunded.

HISTORY LOG

All payments linked, unlinked & refunded on an invoice are tracked in the History log. For each action, an entry is created in the history log of the booking.

As shown below, when a payment is linked to an invoice, on the history log, an entry is created containing the invoice name, payment amount, payment type and reference number.

When a payment is unlinked to an invoice, another payment entry is created:



When a payment is refunded and it was linked to an invoice, a new entry is created in the history log:

Conditions for using linking payments to invoice:

- If there are no invoice created for the booking, the 'Link to an invoice' functionality is greyed out and unclickable.
- Colour coding:
  - When a payment is linked to an invoice, the payment entry on the invoice is displayed with a blue background and 'link' icon.
  - When a payment is unlinked to an invoice, the payment entry on the invoice is displayed with a red background and the 'link' icon is removed.
  - When a payment is fully refunded on the booking, the payment details is strikethrough with a grey background. A tooltip is displayed alongside this entry to show that this payment has been refunded.
  - When a payment is partly refunded on the booking, the payment value on the invoice is changed to an orange color. A tooltip is displayed alongside this entry to show that this payment has been partly refunded.
- When a booking or an invoice is cancelled, the linked payments are removed automatically.
- When an invoice is marked as paid but the payment is refunded on the booking afterwards, the invoice reverts to the 'outstanding' status and the payment is refunded.
- Total Amount and remaining to pay are automatically calculated.
- Card Guarantee payments are not considered in this feature.

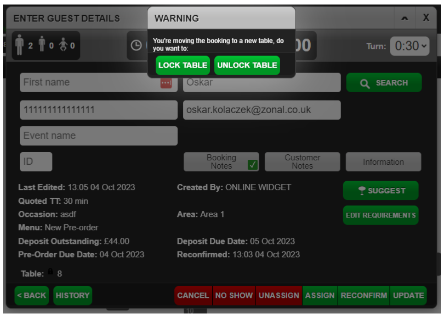
- If a payment is made via Braintree, users can link the payment to an invoice if their statuses are ‘Authorized/Settled/Settling/Submitted_for_settlement/Settlement_pending’, known as ‘BraintreeSuccessStatuses’
  - If the status of the payment is not any of the above, linking to an invoice is disabled.
  - If a payment is linked to an invoice and the status of the payment changes from a ‘BraintreeSuccessStatuses’ to ‘Void/Failed’, the payment is automatically unlinked and cannot be linked to another invoice.
  - If the invoice is marked as paid and the linked payment status has changed, the invoice is reverted to the ‘outstanding’ and the payment link is removed.
- Users are still able to log an amount manually on an invoice (which does not have any relationship with the booking). The purpose of this function is allowing users to add missing amounts that are not reflected on the booking payments.

[Tables] - Table to remain locked after suggest - PPL-1171

This feature introduces a new pop-out when user attempts to suggest a new table for an already locked table.

Previously, table would remain locked once it's been locked by the user, even when changes to the booking were made. However, there was one exception - when user uses the "Suggest" functionality - then the booking is moved and unlocked.

To give Host users more control over their sitting and Tables we have now introduced a new pop-out window when user attempts to suggest a new table for an already locked table:



Once user clicks on either of the buttons:

- Lock table - if clicked it locks the newly suggested table
- Unlock table - if clicked the newly suggested table is not locked

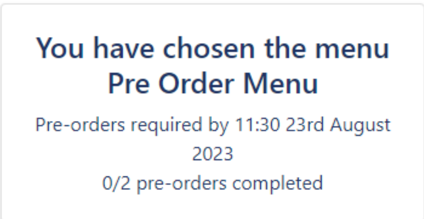
> Please note - even when the setting " Automatically lock a guest to a table when manually assigning a guest" in Tables Site Admin is switched on, when Host user clicks "Unlock Table", then the new table will be unlocked. This is in line with Hosts' ability to override any requirements.

[Guest Portal] - Pre-order closed message - PPL-1166

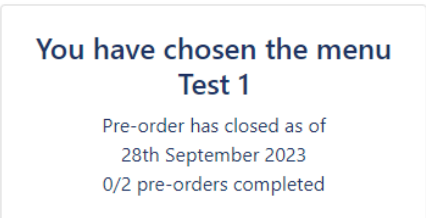
This feature focuses on making the Guest Portal experience more seamless and intuitive with clear-cut communication.

As part of our ongoing effort to make the booking journey more intuitive, as well as our recent changes to the Pre-order in releases 1.61 and 1.62, we decided that a quality of life change is required to make the Pre-order selection cut of clearer to the users.

Previously, Guest Portal wouldn't inform the user that the pre-order window has closed. It only showcased the time and date required, while the closure was communicated by the removal of the "Choose Meals" button post deadline. As can be seen below, this didn't make for a good user experience, as it was not direct enough.



To make it more clear to the Guest user, we have changed the message displayed. So that, when the deadline for placing pre-orders has passed it now states "Pre-order has closed as of *date*"



Technical Changes

[Events] - Remove import ability of Restaurant fromEmail in email settings - PPL-1168

This feature is part of our ongoing effort to deprecate Reservations.

We have removed the "Import All Sites" button from Email settings, as it involved importing email addresses from Reservations. Any changes to sender email address at all levels - Estate, Company and Site will now have to be manual.

[Events] - Scheduled emails - Remove send restriction on 24 hours from created date/time - PPL-1173

This feature removes restrictions on emails being sent within the 24 hours window from the booking creation.

This has not been advertised in Events at any stage, however, it limited emails to be send only after 24 hours from the booking creation has passed. This restriction has now been removed, so that emails can be scheduled and send directly after a booking has been created.

[External API] - Enquries via external API to Respect Minimum Notice Period - PPL-928

This feature ensures that enquires can now be correctly recognised and accepted or rejected given the minimum notice period set up in Events Admin.

Previously Minimum Notice period was not respected by the External API, which would only look at timeslots and enquiry availability but not on the minimum notice period or capacity.

With this change, when making a call to POST / enquiries (create enquiry), we will now check for Minimum Notice period for a given site:

- If within minimum notice period, enquiry to be rejected
- If outside minimum notice period, enquiry to be accepted

Call being accepted or rejected will still also be based on timeslots availability as per existing functionality.

Bookings - 1.62.0 | 2.62.0

Release Date: Staging 12 September 2023 | Production 3 October 2023

Status: Released to Production

For detailed information on Bookings 1.62.0 (events) and 2.62.0 (tables) release please view a section below.

Summary New Features

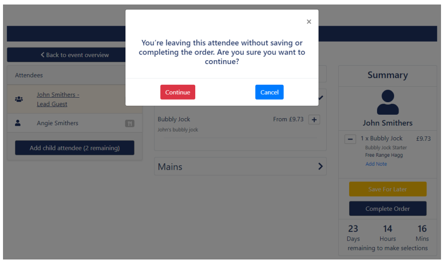
Events - Guest Portal - Attendee Selection - Save / Complete before leaving page / next selection - PPL-1140

The aim of this feature is to ensure that Guest Portal users do not lose their pre-order selection by leaving the page without saving or completing their order.

Previously, the lead guest / organiser might have easily been under the impression that the 'Save for Later' and 'Complete Order' buttons are master buttons that complete the action for everybody on the booking. Users were able to make a selection of pre-order items for a given attendee and then move on to the next one without saving or completing the order.

We have found this to be a possible source of discontent and annoyance to both guests and site users. As such, with the introduction of this feature users will no longer be able to navigate away from the currently selected attendee once they have made any selection of pre-order items without clicking Save for Later or Complete Order.

Now when the user attempts to move away from the currently selected user a new pop out will appear:



Users won't be able to move on from it without selecting one of the options:

- Button 1: Continue - closes the pop-out and allows the user to continue to the newly selected page, doesn't save the pre-order.

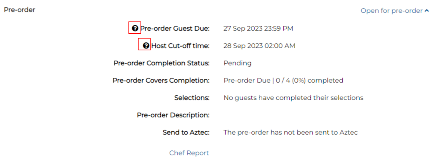
- Button 2: Cancel - closes the pop-out, user remains on the current page, nothing happens to the added pre-order.

Events - Host - Pre Order Cut Off Times User Info - PPL-1120

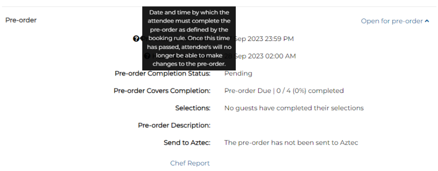
The aim of this feature is to improve users understanding of the pre-order settings so that they can action changes ahead of the cut off times.

We have introduced user information icons about pre-order cut-off times so that users can easily find out what they mean.

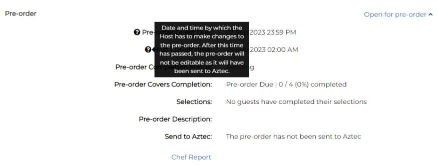
Icons:



"Pre-order Guest due" user info:



"Host Cut Off Time": user info:

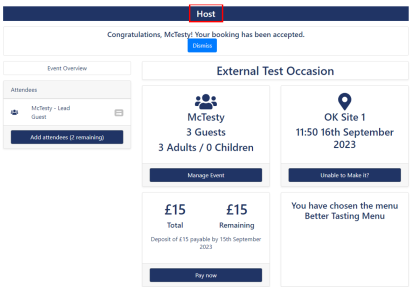


Each of the tool tips expands once the user hovers with their cursor over the icon. Moreover, each of them have specific information in them:

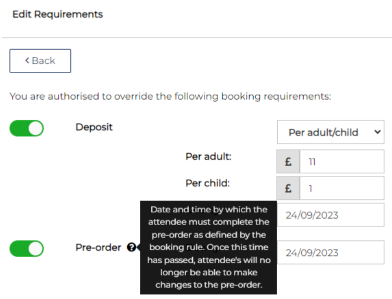
- Pre-order Guest due - "Date and time by which the attendee must complete the pre-order as defined by the booking rule. Once this this time has passed, attendee's will no longer be able to make changes to the pre-order."
- Host Cut Off Time - "Date and time by which the Host has to make changes to the pre-order. After this time has passed, the pre-order will not be editable as it will have been sent to Aztec."

> **Please note, we've introduced a few other changes to the UI, in order to keep consistent naming convention:**

- "Pre-order Admin Due" has been changed to "Host Cut-off time" to avoid any possible confusion about the type of the user referred to
- When Host user logs into a Booking Portal via Events, the banner on top instead of saying "Admin" will now state "Host" (marked in red) to avoid any possible confusion about the type of the user referred to



- In Events Host app, when editing requirements for the booking there is now a User Icon stating:
  - Pre-order - "Date and time by which the attendee must complete the pre-order as defined by the booking rule. Once this time has passed, attendee's will no longer be able to make changes to the pre-order."



Events - Guest Portal Enhancements - Add Attendee - PPL-1034

This feature focuses on improving the Guest Portal experience, specifically adding other attendees to the booking.

As part of our continuous effort to improve the Guest Portal experience, we have enhanced the way we add attendees via the Guest Portal. As a result of that we've reworked existing "Add Attendee" functionality and introduced a completely new way of completing this action from the Pre-order screen.

1. Firstly, reworked "Add Attendee" functionality. In the last release (1.61) we've introduced new Menu Pre-order rules to better suit larger bookings. We are following this up with functionality that will allow Lead Guests to add other attendees on mass. Let's illustrate the changes, the below section will outline the changes that occur when the booking has one of the two rules attached to it:

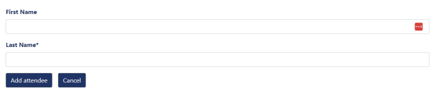
- Allow Organiser to add and invite (manage) attendee's booking
- Allow Organiser to add but not invite (manage) attendee's booking

You'll spot that we're not listing the third rule introduced in the previous release "Allow Organiser to complete booking on behalf of the group is selected", that's because the Lead Guest is unable to add other attendees if this is applied.

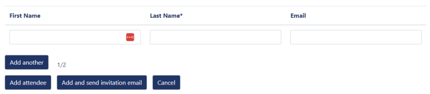
(A) If "Allow Organiser to add and invite (manage) attendee's booking" is applied:

New grid view of the function will now allow Lead Guests to add multiple attendees at the same time, thus eliminating the unnecessarily long flow of previous builds.

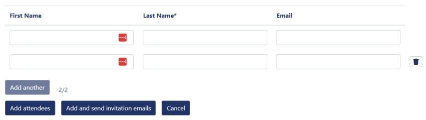
Old view:



New grid view:



New grid view with another row added:



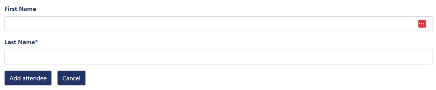
Summary list of changes to the screen:

- First Name, Last Name and Email are in the same row
- X / N counter - shows already added rows out of remaining covers
- "Add Another" button - once clicked it adds a new input row and updates the counter. If there are no more covers to be added, then the button is greyed out.
- "Bin" icon next to each row - once clicked it removes the row regardless of the input
- Plural nouns in the text in the buttons "Attendees" and "emails". However, if there is only 1 other attendee, then singular forms of the nouns will be used.
- In a situation where there are too many rows to fit comfortably on the screen a slider appears, and the rest of the rows are accessible by scrolling down the page.

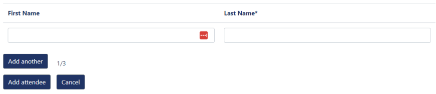
(B) If "Allow Organiser to add but not invite (manage) attendee's booking" is applied:

New grid view of the function will now allow Lead Guests to add multiple attendees at the same time, thus eliminating the unnecessarily long flow of previous builds.

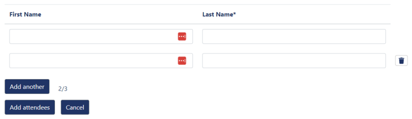
Old view:



New grid view:



New grid view with another row added:

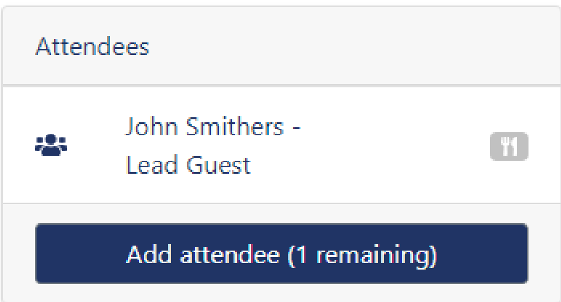


Summary list of changes to the screen:

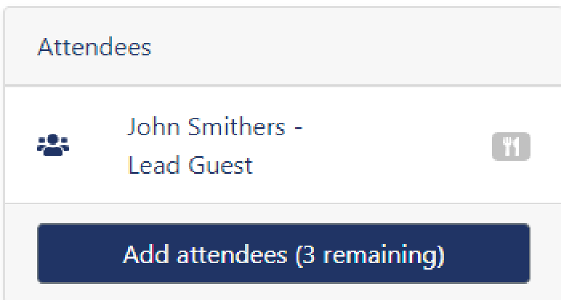
- First Name, Last Name are in the same row
- X / N counter - shows already added rows out of remaining covers
- "Add Another" button - once clicked it adds a new input row and updates the counter. If there are no more covers to be added, then the button is greyed out.
- "Bin" icon next to each row - once clicked it removes the row regardless of the input
- Plural nouns in the text in the button "Attendees". However, if there is only 1 other attendee, then singular form of the noun will be used.
- In a situation where there are too many rows to fit comfortably on the screen a slider appears, and the rest of the rows are accessible by scrolling down the page.

(C) Shared Changes

If there is more than 1 other attendee to be added, then the text on "Add Attendee" button should change to plural "Add Attendees"

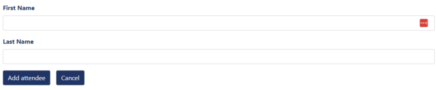


vs.

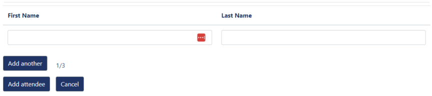


Moreover, the same changes as above have been applied to Child attendees

Old view for children attendees:



New grid view for children attendees:



Summary list of changes to the screen:

- First Name, Last Name are in the same row
- Last name is not mandatory
- X / N counter - shows already added rows out of remaining covers
- "Add Another" button - once clicked it adds a new input row and updates the counter. If there are no more covers to be added, then the button is greyed out.
- "Bin" icon next to each row - once clicked it removes the row regardless of the input
- Plural nouns in the text in the button "Attendees". However, if there is only 1 other attendee, then singular form of the noun will be used.
- In a situation where there are too many rows to fit comfortably on the screen a slider appears, and the rest of the rows are accessible by scrolling down the page.

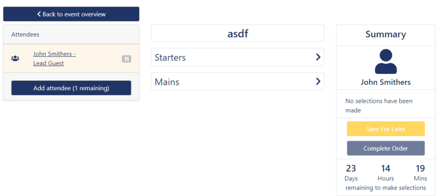
2. Secondly, new functionality of adding attendees from the Pre-order screen. This will allow users more flexibility, as they are now able to add attendees directly from the pre-order screen without having to exit it to the Event Overview page. Those changes will apply to bookings with one of the two rules assigned:

- Allow Organiser to add and invite (manage) attendee's booking
- Allow Organiser to add but not invite (manage) attendee's booking

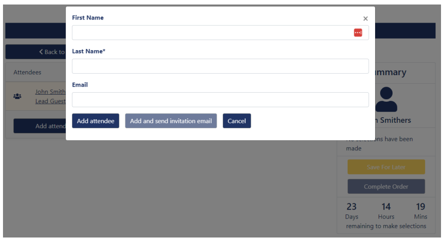
It will not apply to "Allow Organiser to complete booking on behalf of the group is selected", as the Lead Guest is unable to add other attendees with this rule on.

<u>(A) If Allow Organiser to add and invite (manage) attendee's booking is applied:</u>

A new "Add attendee" button is added to the pre-order page, as shown below:



Once "Add attendee" is clicked on this screen, it opens a pop-out which mimics the functionality of the page accessible from the Event Overview screen, as seen below:

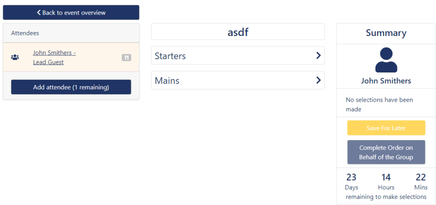


Functionality of the buttons available in the pop-out:

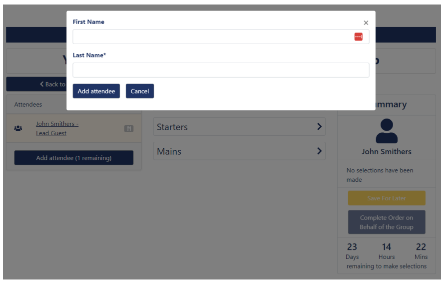
- "Add attendee" - adds attendee and closes pop-out
- "Add and send invitation email" - adds attendee, sends invitation email and closes pop-out
- "Cancel" - closes the pop-out without saving details
- "X" - closes the pop-out without saving details

<u>(B) If Allow Organiser to add but not invite (manage) attendee's booking is selected:</u>

Similarly as to the previous rule a new "Add attendee" button is added to the pre-order page, as shown below:



Once "Add attendee" is clicked on this screen, it opens a pop-out which mimics the functionality of the page accessible from the Event Overview screen. The major difference to the previous rule is that this pop-out is missing "Add and send invitation email" , as the Lead Guest is unable to invite other attendees.



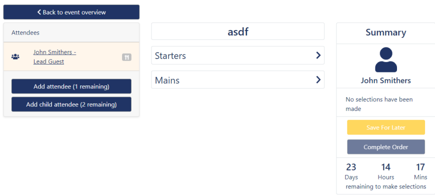
Functionality of the buttons available in the pop-out:

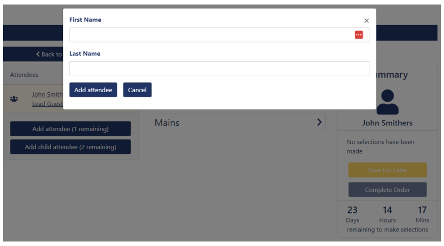
- "Add attendee" - adds attendee and closes pop-out
- "Cancel" - closes the pop-out without saving details

* "X" - closes the pop-out without saving details

<u>(C) Shared functionality:</u>

In either of the requirements, there might be children attendees attached to the booking. Just as above, a new button "Add Child attendee" has been added to the screen, which once click will open up a pop-out that looks the same for either of the above rules:



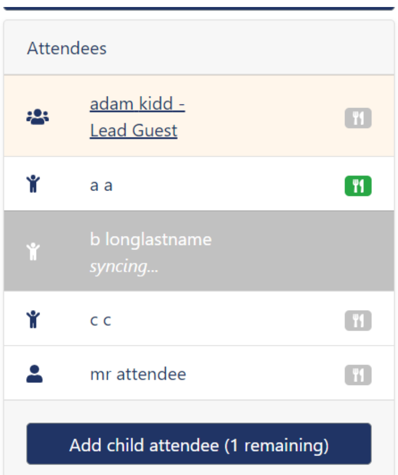


Functionality of the buttons available in the pop-out:

* "Add attendee" - adds attendee and closes pop-out
* "Cancel" - closes the pop-out without saving details
* "X" - closes the pop-out without saving details

Worth noting is that for any Child attendees the Last Name field is not mandatory.

Additionally, because it might take a brief moment for the newly added attendee to sync up with pre-order, we've decided to add a new user status "Syncing" when this occurs:



While the attendee is syncing they cannot be selected and pre-order cannot be added to their name. Once synced it'll automatically refresh and the user will be able to select the attendee.

Events - New Email Dynamic Field - PPL-1121

This feature added a new dynamic field for the Event ID into email templates.

To improve the ease of sharing details of the booking between the site and the guests we've now added a new dynamic field in Events Estate Admin which pulls the Event ID info into the email template.

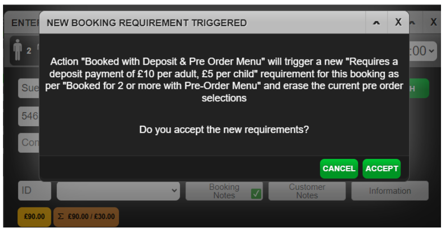
The field follows the logic of any previous dynamic fields and is included as " %EventId% ". It can be added to any existing email template.

Tables - Host Notification - PreOrder = True and Covers are changed (display correct message)- PPL-1113

The aim of this feature is to ensure that Tables Host is shown correct information when a booking is edited.

Previously, when Tables Host would make a change of covers, time, date or occasion on a booking which was marked as confirmed and had pre-order against it, Tables would incorrectly showcase a pop-out message about Pre-order being deleted.

Incorrect message below:

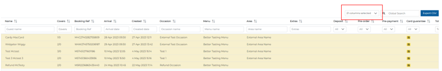


In reality, even when the Host accepted the change the Pre-order wasn't deleted. With this feature, when an edit to covers, time, date or occasion is made, then any new booking rules will be ignored and the Host will instead see a correct message at the bottom of the screen informing them about an update to the booking:

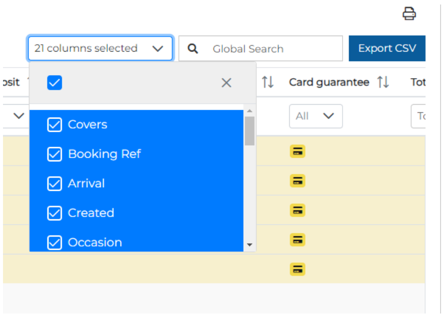
Events – Bookings List – Option to select columns - PPL-1069

The aim of this feature is giving host app users the ability to choose the columns which they would like to make visible on the Bookings List during the increasing number of columns being added.

To make information more accessible and customisable we have added an option for the Host users to choose the columns they want to see on their booking list. As shown below, a filter is now added next to the search bar:



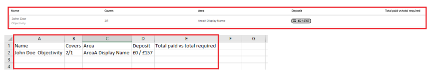
When the user clicks on this filter, a drop down list of all columns is displayed:



Conditions for Option to select columns:

- By default, all columns are selected
- If the user un-selects a column, the selected column is hidden
- If the user selects a column, the selected column is made visible
- By default, the name column is visible and is not part of the drop down list
- Selected columns are always remembered if the user navigates out of the Bookings List page.

Additionally selected and visible columns are also displayed on the Print Page & CSV export:

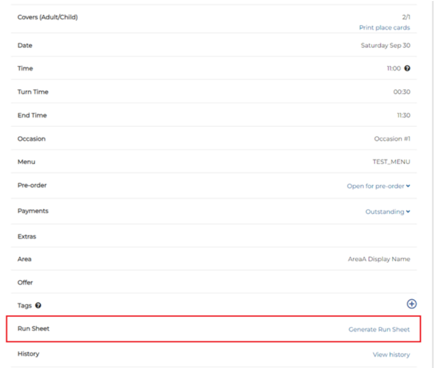


Events - Central Reservations - Running Order / Function Sheets - PPL-1080

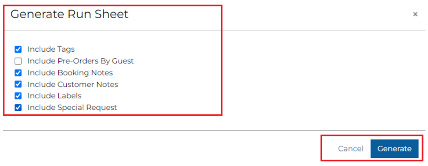
The aim of this feature is to allow host Events Host users to generate and print a ‘run sheet’ for their event / booking.

This feature will allow Events Host users in the restaurant to have a copy of all requirements for a particular event / booking easily accessible in one place.

As shown below, a new section called ‘Run Sheet’ is added to the booking panel:



After clicking on ‘Generate Run Sheet’, the user will be prompted to choose some optional fields which they would like be part of their run sheet, as illustrated:



In that popup, the user can choose between the following optional fields:

- Include Tags
- Include Pre-orders by Guest
- Include Booking Notes
- Include Customer Notes
- Include Labels
- Include Special request

After making the selection, the user clicks on generate and the run sheet is generated in PDF as shown in the next example:

RUN SHEET

CUSTOMER DETAILS

Customer Name	John Doe
Company	Objectivity
Phone	12345677
Email Address	mzielinski2@objectivity.co.uk

BOOKING DETAILS

Booking Reference	D9J52634268476
Site Name	Objectivity Site
Date	30/09/2023
Time	11:00
Covers	2 / 1
Occasion	Occasion #1
Menu	TEST_MENU
Area	AreaA Display Name
Tags	Tag #2
Labels	Label 1, Label 3

BOOKING REQUIREMENTS

Deposit:

Due Date	29/09/2023
Amount Required	£157.00
Amount Paid	£0.00
Amount Remaining	£157.00

Pre-Order:

Due Date	29/09/2023
Covers Completed	0/3 (0%) completed

PRE-ORDERS

Menu	Group	Quantity	Product
TEST_MENU	Group One	1	Diet Coke †
TEST_MENU	Group Two	1	Plant burger 1 2 x 50p item, (Roasted).
TEST_MENU	Group Two	1	Smoked Cheddar 50p item.
TEST_MENU	Group One	1	Pepsi Max
TEST_MENU	Group Two	1	Salt n Vinegar
TEST_MENU	Group Two	1	Snowflake Burger. 2 x 50p item, (Boiled).

Special Requests

Special request note

Booking Notes

My booking note

Customer Notes

My customer note

1 / 1

Worth noting that if the user selects ‘Pre-orders by Guest’ as an optional field, then the pre-orders is displayed differently:

RUN SHEET

CUSTOMER DETAILS

Customer Name	John Doe
Company	Objectivity
Phone	12345677
Email Address	mzielinski2@objectivity.co.uk

BOOKING DETAILS

Booking Reference	D9J52634268476
Site Name	Objectivity Site
Date	30/09/2023
Time	11:00
Covers	2 / 1
Occasion	Occasion #1
Menu	TEST_MENU
Area	AreaA Display Name
Tags	Tag #2
Labels	Label 1, Label 3

BOOKING REQUIREMENTS

Deposit:

Due Date	29/09/2023
Amount Required	£157.00
Amount Paid	£0.00
Amount Remaining	£157.00

Pre-Order:

Due Date	29/09/2023
Covers Completed	0/3 (0%) completed

PRE-ORDERS

John Doe	Menu	Group	Quantity	Product
	TEST_MENU	Group One	1	Diet Coke †
	TEST_MENU	Group Two	1	Plant burger 1 2 x 50p item, (Roasted).
	TEST_MENU	Group Two	1	Smoked Cheddar 50p item.

Jane Doe	Menu	Group	Quantity	Product
	TEST_MENU	Group One	1	Pepsi Max
	TEST_MENU	Group Two	1	Salt n Vinegar
	TEST_MENU	Group Two	1	Snowflake Burger. 2 x 50p item, (Boiled).

Special Requests

Special request note

Booking Notes

My booking note

• Booking notes, Customer notes are always pre-selected in the optional popup

• If there are no data for a specific field, then the field is not displayed when generating the run sheet

• The latest data available for the booking is always used when generating a ‘Run sheet’

Events Admin - Occasion & Menu email section - Template tags - Don't always work - PPL-1133

The aim of this feature is to ensure that dynamic fields work correctly and pull the right information into custom fields.

The main issue was that in the custom email section some of the dynamic fields would come back "not Applicable" when used.

This was especially apparent for the corresponding custom fields:

- %CardGuaranteeCutOffDate%
- %DepositCutOffDate%
- %PreOrderCutOffDateTime%

The issue has now been resolved so that all dynamic fields should be pulling in the correct information.

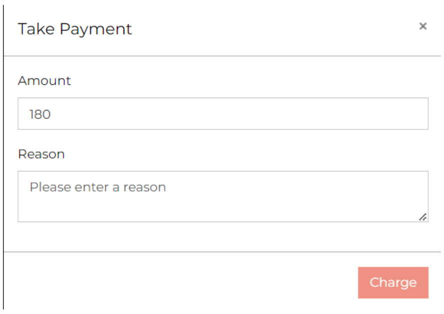
Events - Card Guarantee - Enhancements - PPL-1117

The aim of this feature is to bring more functional utility to the Card Guarantee requirement.

We believe that the Card Guarantee feature can be a rather useful tool in the hands of Hosts for combating no-shows. As such, we've introduced several quality of life changes that will make this feature easier to use and understand.

1. First of all, we've increased the time limit for a Host to charge Card Guarantee. We will now store the payment token for 48 hours instead of 24, effectively doubling Host's chance to take action.

2. Secondly, when it gets to the worse and the Host has to charge a reservation using the Card Guarantee function, we will now pre-populate the value based on what was required via the Booking Rule, as can be seen below



- The host can still amend the total
- Reason is still mandatory
- No change to functionality of Card Guarantee requirement

3. The next change provides Hosts with more easily accessible information about the status of the payment details.

(A) Payments Details have been removed

Once the card details have been removed either after 24 hours or manually by the Host by clicking "Remove" then:

- the status will update to say "Payment details have been removed"
- "Remove" & "Charge" buttons will disappear
- Small text saying "See guest audit for full details." under the status with a link to Booking History will appear. This link once clicked should open the booking history pop-out with the search open on "Removed" logs, once closed the filters will reset

Please see the example below:

(B) Payments Details have bee charged:

Once the card has been charged by the Host then:

- the status will update to say "Payment details have been charged"
- "Remove" & "Charge" buttons will disappear
- Small text saying "See guest audit for full details." under the status with a link to Booking History will appear. This link once clicked should open the booking history pop-out with the search open on "Charged" logs, once closed the filters will reset

Please see the example below:

4. Lastly, to improve communications with the customers, we've introduced a new email template "Card Guarantee Payment" which will trigger only when the payment details are charged: