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INTRODUCTION

Welcome to OpenTable Connect! This user manual will guide you through the initial setup and day to day use of the OpenTable Connect product.

LOGGING IN TO YOUR OPENTABLE CONNECT ACCOUNT

1 - Login to www.OTConnect.com - Use the credentials that your project coordinator provided to you in the Step 2 email.

![Login Screen]

*If you do not have the email containing your credentials, please contact your Project Coordinator*

2 - Create your own unique password - Upon your first log-in, you will be asked to create a new password. Your new password must contain eight (8) characters with at least one (1) number.

![Change Password Screen]

Once you have created your new Password, the system will require you to login using the new password you just created.
EDITING YOUR AVAILABILITY

Reservations Dashboard

Each time you log in to your OpenTable Connect account, you will be directed to the Reservation Dashboard where you can see an overview of the month’s shifts.

The Monthly View of the Reservation Dashboard is also where you can see which shifts have reservations, as well as any shifts you have closed or locked.

- Select Monthly or Daily View
- Change the date range
- Click on a day to view further details
- Mouse over a day to get a reservation summary
- The lunch shift on this day has been closed
- The dinner shift on this day has been locked
Daily View

The Daily View is where you can view a list of the reservations that have been made for a given day. Reservations are displayed in the shift for which they were made.

Clicking on the reservation name will display the Reservation Details pop-up, where you can see reservation notes, phone number, & email (if customer opted to provide it). Changes to the time, date and party size for the reservation can be made through the Reservation Details pop-up.

The remaining covers available for the shift are displayed here.

Click the name to view reservation details.

Adjust the time and date of the reservation.

Adjust the party size.

Reservation Details

Reservation on Thursday 04/14/2011

Last Name | First Name | Party Size | Phone | Email
--- | --- | --- | --- | ---
Diner | Joe | 6 | 111-111-1111 | jrdiner@fake.net

Reservation Notes

I'll be celebrating my birthday.

Cancel Reservation | Mark as No-Show

Date Made: 4/13/2011
In the Reservation Details pop-up you can also Cancel or No-Show reservations. The No-Show button will remain inactive until the time of the reservation, at which point it will become active and you can use it to no-show reservations.

You have **up to 48 hours** after the reservation time to no-show a reservation or to change the party size to reflect the number of guests that actually arrived at your restaurant.
Making Changes to Shifts from the Daily View

In the Daily View, click Open, Close or Lock Shift at the bottom of each shift to modify that shift. Using these controls will only affect the shift you have selected and will not alter any other days. Closing a shift for instance will only close the shift for the modified day and will not apply to the same date in the future.

You can also click the Modify Schedule button to make changes to your schedule, as well as adjust online availability.

On days that have a modified schedule, the Modify Schedule button will have an orange background.
In the Modify Schedule menu, you can open or close shifts, change shift start or end times, and adjust the maximum number of covers available to be booked online. Similarly to making changes to shifts in the Daily View, changes made in the Modify Schedule Menu will only be applied to the selected day.

If your restaurant is closed for any reason, be sure to close that shift/day in the OpenTable Connect system. **Failure to do so could result in one of your diners arriving to a closed door!**

**Reporting**

**Reservation & Cancellation**

In the Reservation & Cancellation section of the Reports menu, you can run reports on the number of reservations, cancellations and no-shows for a specific day or a date range.

Select the start and end date for the report

Choose the elements to include in the report
MODIFY YOUR OPEN TABLE CONNECT SETTINGS
The settings for your OpenTable Connect account can be adjusted in the Settings menu.

Shift Setup
The Shift Setup menu is where you can make changes to your default schedule which will be applied to all future days. Set which shifts are open on which days of the week and when each shift starts or ends. This is also where you can set your pacing, which is the maximum number of covers available to be booked online per 15 or 30 minute period.
Alerts

Set up alerts to receive a text message and/or email notifications for new reservations or to receive summaries of upcoming reservations. You can also setup optional phone call alerts as a way of being notified of same day reservations.

To configure text message alerts, check the Text Message box to open the configuration menu. You can enter up to five phone numbers to which text message alerts will be sent, simply click the Add Another Phone Number button to add more numbers.

To configure email alerts, check the Email box. You’re required to enter at least two email addresses to which alerts will be sent.

NOTE: For both text message and email alerts, if on step 2 you choose any option other than “for all future days,” you’ll be required to receive summary alerts. Otherwise, the summaries are optional.
To configure optional **phone call alerts**, check the Phone Call box to open the configuration menu. You can enter multiple phone numbers to which automated phone alerts will be sent and the Place Test Call button will let you test the phone numbers you’ve entered.

### Holidays and Closures

By default OpenTable Connect comes preconfigured with major holidays closed. You can choose to set these holidays to open in order to take online reservation for those days.

<table>
<thead>
<tr>
<th>Holiday</th>
<th>Day of Year</th>
<th>Open</th>
<th>Closed</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Year’s Day</td>
<td>January 1</td>
<td>☑</td>
<td>☐</td>
</tr>
<tr>
<td>Valentine’s Day</td>
<td>February 14</td>
<td>☑</td>
<td>☐</td>
</tr>
<tr>
<td>Mother’s Day</td>
<td>Second Sunday in May</td>
<td>☑</td>
<td>☐</td>
</tr>
<tr>
<td>Memorial Day</td>
<td>Last Monday in May</td>
<td>☑</td>
<td>☐</td>
</tr>
<tr>
<td>Independence Day</td>
<td>July 4</td>
<td>☑</td>
<td>☐</td>
</tr>
<tr>
<td>Labor Day</td>
<td>First Monday in September</td>
<td>☑</td>
<td>☐</td>
</tr>
<tr>
<td>Thanksgiving Day</td>
<td>4th Thursday in November</td>
<td>☑</td>
<td>☐</td>
</tr>
<tr>
<td>Day After Thanksgiving</td>
<td>Day After 4th Thursday in November</td>
<td>☑</td>
<td>☐</td>
</tr>
<tr>
<td>Saturday After Thanksgiving</td>
<td>Saturday After 4th Thursday in November</td>
<td>☑</td>
<td>☐</td>
</tr>
<tr>
<td>Sunday After Thanksgiving</td>
<td>Sunday After 4th Thursday in November</td>
<td>☑</td>
<td>☐</td>
</tr>
<tr>
<td>Christmas Eve</td>
<td>December 24</td>
<td>☑</td>
<td>☐</td>
</tr>
<tr>
<td>Christmas Day</td>
<td>December 25</td>
<td>☑</td>
<td>☐</td>
</tr>
<tr>
<td>New Year’s Eve</td>
<td>December 31</td>
<td>☑</td>
<td>☐</td>
</tr>
</tbody>
</table>

Please list out any additional dates you will be closed. No shifts will be open for booking.

- **Add Another Closed Day**
MESSAGE CENTER

The Message Center can be found at the bottom of each page of the OpenTable Connect website, and is where you will receive important messages and updates from OpenTable regarding your account and the OT Connect product. Under the Resources section, you’ll find links to valuable OpenTable resources.

ADDITIONAL RESOURCES

Additional OpenTable sites to visit

www.OTLearningcenter.com – Videos, tutorials and classes
www.OTRestaurant.com – Change your profile, sign up for promotions, read your diner feedback.
*Please contact OpenTable support 1-800-673-6822 to get your OT Restaurant credentials.*
www.OpenTable.com – make your own reservations

ADDITIONAL OTCONNECT DETAILS

Shift Times
If a lunch shift is offered, the times between 12:00 – 1:00pm must be available for online reservations. If a dinner shift is offered, the times between 6:00 – 8:00pm must be available for online reservations.

Cancellations, No-Shows, and Party Size Changes
Restaurants must mark a reservation as cancelled or no-show or change the party size within 48 hours after the reservation day and time. After that, the diners are assumed to have been seated and honored the reservation.

Day of Week Availability
For each shift that has been selected (breakfast, lunch, dinner), at least one day of the week must be open and available for online reservations.

Inventory Availability
Each open shift is set to accept up to 40 covers by default during the shift.

Maximum Party Size
Each restaurant is set to accept parties up to 20 people by default for any open shifts.

Alert Options
Restaurants can receive reservation alerts via text message or email. An alert will automatically be sent every time a reservation is made, changed, or cancelled.