



I. Making, Moving, Changing, and Cancelling Reservations

Book View

The screenshot shows the OpenTable Book View interface. At the top, there are controls for Restaurant (OT Bistro), Shift (Dinner), Date (Today 4/14/2009), Time (6:00 PM), Total Count (14 Seated: 0), Now (9:41 AM), and Connection Status. Below these are navigation buttons: Sheet (A), Book (B), Waitlist, and Floor (C). The main table displays reservation slots with columns for Time, Name, # (E), Tbl, and N. Callouts D and F point to the Shift and Date controls respectively. Callout G points to the Change button, and callout H points to the Status button. Callout I points to an empty slot in the table.

* Time	Name	#	Tbl	N	* Time	Name	#	Tbl	N	* Time	Name	#	Tbl	N
5:00	Casey, Eliza	4			6:00		4			7:15		2		
5:00		4			6:15	Jones, Bill	2			7:15		2		
5:00		4			6:15	Rahmatian,	3	4		7:30	Li, Serena	2		VIP
5:00		4			6:15		2			7:30	Gordon, Joh	3		
5:30		4			6:15		2			7:30		2		

- A. Sheet:** Display the Sheet View.
- B. Book:** Display the Book View.
- C. Floor:** Display the Floor View.
- D. Shift:** Change shift (lunch, dinner, etc.).
- E. #:** Max party size for this slot.
- F. Date:** Change the date.

- G. Change:** [Reservation] Move or cancel a highlighted reservation, view the Change Log. [Empty Slot] Change slot (for this shift only).
- H. Status:** Change the reservation status.
- I. Empty Slot:** Available for a new reservation.

Making New Reservations

1. Tap **Sheet** (A) or **Book** (B) on the Side Navigation Bar to go to one of those views.
2. Tap **Date** (F) and **Shift** (D) to select the desired date and shift for the reservation.
3. Look for empty slots that match the requested time and party size. The **#** (E) column (Book View only) shows the slot's max party size.
4. Double-tap an empty reservation slot (I).
5. Enter information to search for the guest.
6. If a returning guest appears in the list, tap the name and then tap **Select Guest**. For new guests, tap **New Guest**.
7. Tap **Save** to book the reservation.

Moving Existing Reservations

1. Tap **Sheet** (A) or **Book** (B) on the Side Navigation Bar to go to one of those views.
2. Find and tap the reservation to be moved.
3. Tap **Change** (G), then tap **Move Entry**.
4. Tap **Date** (F) and **Shift** (D) to select the desired date and shift of the new slot.
5. Tap the empty reservation slot where you want to move the reservation.
6. Tap **Move** at the bottom of the view. The reservation is moved to the new slot.

Changing Reservation Details

1. Tap **Sheet** (A) or **Book** (B) on the Side Navigation Bar to go to one of those views.
2. Find and double-tap the desired reservation.
3. Make your changes and tap **Save**. You can change party size, phone number, guest and reservation notes / codes, etc.



You can change the time here as well, but it is better to move the party to a new slot to stay close to the original schedule.

Cancelling Reservations / Changing Status

1. Tap **Sheet** (A) or **Book** (B) on the Side Navigation Bar to go to one of those views.
2. Find and tap the desired reservation.
3. Tap **Status** (H) and then tap **Cancelled** to cancel the reservation. The reservation is cancelled and removed from all views.
4. Or instead of **Cancelled**, you can tap one of the other status values. The background color is changed to reflect the new status.



Cancellations are recorded in the guest's history. Some status changes are not allowed, depending on the current status and date.

II. Adding and Changing Empty Slots (For One Shift)

Sheet View

- A. Sheet:** Display the Sheet View.
- B. Book:** Display the Book View.
- C. Standard Slot:** Available for booking by BOTH restaurant AND Internet users.
- D. Manager Slot:** Available for booking ONLY by restaurant users (NOT Internet users).
- E. Expiring Manager Slot:** Available for booking only by restaurant users UNTIL it expires. After expiration, can be booked by both restaurant AND Internet users.

- F. *:** Indicates added or changed slots.
- G. Shift:** Change shift (lunch, dinner, etc.).
- H. Date:** Change the date.
- I. Add:** Add an empty reservation slot (for this shift only) on the Sheet, Book, Floor Views.
- J. Change:** [Reservation] Move or cancel a highlighted reservation, view the Change Log. [Empty Slot] Change slot (for this shift only).

Why Add and Change Empty Slots?

You may need to add or change empty slots **for one shift** to adjust the operational flow. The best way to do this is to use the **Add (I)** and **Change (J)** buttons on the Top Navigation Bar.

Adding and changing slots in this way **only affects one shift**. If you want to make slot changes that affect multiple days or shifts, you must change the reservation sheet assigned to those shifts. See *IV. Editing Reservation Sheets* for more details.



Adding and changing empty reservation slots can lead to overbooking! You may be prompted for a password.

Adding Reservation Slots

1. Tap **Sheet (A)** or **Book (B)** on the Side Navigation Bar to go to one of those views.
2. Tap **Date (H)** and **Shift (G)** to select the desired date and shift.
3. Tap **Add (I)** to begin setting slot attributes (time, party size, etc.) for the new slot.
4. Tap **Save**. A new slot is added (**for this shift only**) and a **red (+)** is displayed in the "*" column next to the new slot.



You can only add Standard Slots using the Add button. You may be prompted for a password.

Symbols in the * Column

Symbols that appear in the "*" column on the Sheet, Book and Floor Views help keep track of what slots were added or changed using the **Add (I)** and **Change (J)** buttons.

- | | |
|--|--|
| | Added Standard Slot (Red) |
| | Changed Standard Slot (Solid Red) |
| | Changed Manager / Expiring Manager Slot (Solid Blue) – Available for booking <u>ONLY</u> by restaurant users |
| | Expired Manager Slot (Clear Blue) – Available for booking by <u>BOTH</u> restaurant <u>AND</u> Internet users |

Changing Empty Reservation Slots

1. Tap **Sheet (A)** or **Book (B)** on the Side Navigation Bar to go to one of those views.
2. Tap **Date (H)** and **Shift (G)** to select the desired date and shift.
3. Tap an empty reservation slot. Tap **Change (J)**, and then tap **Configure Slot**.
4. Change the slot attributes (time, party size, etc.) and tap **Save**.
5. The slot is changed (**for this shift only**) and a solid **red (Standard Slot)** or **blue (Manager Slot)** triangle is displayed in the "*" column next to the changed slot.

III. Creating Reservation Sheets

Sheets, Floor Layouts, Schedules Dialog

Sheets, Floor Layouts, Schedules

Overview | **Sheets** | Floor Layouts | Schedules

Select a reservation sheet and tap "Change" to edit the sheet. You can also tap "Add" to begin editing a new sheet.

Reservation sheets are templates containing reservation slots. After creating or editing your sheet, you can assign the sheet to a shift on the Schedules Tab.

Reservation Sheet Name	Type	Shift	Active?	Open Time	Close Time
Banquet	Regular	Dinner	No	5:00 PM	11:00 PM
Copy Special shift	Regular	Dinner	No	5:00 PM	11:00 PM
Dinner Sun-Wed	Regular	Dinner	Yes	5:00 PM	11:00 PM
Dinner Thu-Sat	Regular	In-House Only 1	No	5:00 PM	11:00 PM
Holiday Brunch	Regular	Brunch	No	11:00 AM	3:00 PM
Lunch	Regular	Lunch	Yes	11:00 AM	4:00 PM
Lunch 2	Regular	Lunch	Yes	11:00 AM	4:00 PM
Lunch 3	Regular	Lunch	No	11:00 AM	5:00 PM
Sunday Brunch	Regular	Brunch	Yes	11:00 AM	3:00 PM
Thanksgiving	Regular	Dinner	No	5:00 PM	11:00 PM

Buttons: Add, Change, Delete, Copy, Exit

Sheets and Floor Layouts

The OpenTable system is based on **reservation sheets**. Reservation sheets are made up of time slots that represent when the restaurant will accept dining reservations. Typically, restaurants create several different reservation sheets based on the number of tables available and differences in the operational flow (depending on day, shift).

Floor layouts are computer representations of the restaurant's dining rooms that will display on the Floor View for seating guests during a shift. Floor layouts are assigned to reservation sheets.

Scheduling

Default Schedules are the restaurant's REGULAR schedule for each of the seven days of the week (Sunday – Saturday). Set up your Default Schedule by assigning reservation sheets to the open shifts for each day of the week. Once configured, the Default Schedules will be in place throughout the year.

Alternate Schedules are one time schedule changes that temporarily replace your Default Schedule. See [V. Scheduling ...](#) for more details on how to make scheduling changes.

Creating a Reservation Sheet

1. Tap **Admin** on the Side Navigation Bar. Then, tap **Sheets, Floor Layouts, Schedules**.
2. If prompted, enter a password.
3. Tap **Yes** to backup your reservation book. Then tap the **Sheets** tab (A).
4. Tap **Add** (B) to create a new sheet.
5. Enter a name for the new sheet (sheet names must be unique) and select the Shift and Type. Tap the clock icons to set the shift open (First Slot) and close (Last Slot) times.
6. Tap the **Edit Sheet** tab to begin adding slots (see [IV. Editing Reservation Sheets](#)).
7. Tap **Save** to save the sheet.

Copying a Reservation Sheet

- Instead of creating a new sheet, you can save time by copying an existing sheet.
1. Tap **Admin** on the Side Navigation Bar. Then, tap **Sheets, Floor Layouts, Schedules**.
 2. If prompted, enter a password.
 3. Tap **Yes** to backup your reservation book. Then tap the **Sheets** tab (A).
 4. Tap the reservation sheet you want to copy and tap **Copy** (C).
 5. Enter a name for the new sheet (sheet names must be unique) and tap **Save**.

IV. Editing Reservation Sheets

Edit Sheet Dialog

Use the controls beneath the "Sheet Details" area on the left to add, change, delete, and copy slots on this sheet.

Sheet Name: Lunch 3 Shift: Lunch First Slot: 11:00 AM Last Slot: 5:00 PM

*	Time	Min	Max	Table	Type
	12:00 PM	2	4		Standard
	12:15 PM	2	4		Standard
	12:15 PM	2	4		Standard
▲	12:30 PM	1	2		Manager
▲	12:30 PM	2	4		Standard
	12:30 PM	2	4		Standard
	12:30 PM	2	4		Standard
	12:45 PM	2	4		Standard
	12:45 PM	2	4		Standard
	1:00 PM	1	2		Standard

Slot Size	#	Covers
2-Top	16	32
4-Top	45	180
6-Top	0	0
8-Top	0	0
10-Top	0	0
>10-Top	0	0
Total:	61	212

Legend
 + = New Manager Slot
 + = New Standard Slot
 ▲ = Changed Manager Slot
 ▲ = Changed Standard Slot



One reservation sheet may be assigned to more than one shift! Changing the sheet will affect all the shifts that the sheet is assigned to. Go to the Properties Tab on the Edit Sheet dialog to see what shifts the reservation sheet is assigned to.

Editing Sheets from the Sheet / Book View

1. Tap **Sheet** or **Book** on the Side Navigation Bar to go to one of those views.
2. Tap **Date** and **Shift** on the Top Navigation Bar to go to the date and shift that has the reservation sheet you want to edit.
3. Tap **Options** on the Top Navigation Bar. The name of the sheet is displayed at the top.
4. Tap **Edit This Reservation Sheet**.
5. If prompted, enter a password.
6. The Edit Sheet dialog is displayed.

Editing Sheets from the Admin View

1. Tap **Admin** on the Side Navigation Bar. Then, tap **Sheets, Floor Layouts, Schedules**.
2. If prompted, enter a password.
3. Tap **Yes** to backup your reservation book. Then tap the **Sheets** tab.
4. Tap the reservation sheet you want to edit and tap **Change**. The **Edit Sheet** dialog is displayed (see above).

Adding Slots on a Sheet

1. Select and load the sheet you want to edit.
2. Tap **Add** (C) and set the slot's attributes (time, party size, etc.).
3. Tap **Add**. The slot is added and a (+) is displayed in the "*" column next to it.

Editing / Deleting Slots on a Sheet

1. Select and load the sheet you want to edit.
2. Tap the slot you want to edit (B). Tap **Change** (D) and make your changes.
3. Tap **OK**. The slot is changed and a triangle is displayed in the "*" column next to it.
4. To edit multiple slots, hold down the **Ctrl** key (on your keyboard) and tap the desired slots.
5. Tap **Change** (D) and check the checkbox for the attributes you want to change.
6. Make your changes and tap **OK**. The attributes you edited will change for all selected slots and a triangle is displayed in the "*" column next to the changed slots.
7. To delete slots, tap the slot you want to delete and tap **Delete** (E). The slot is removed.
8. Tap **Save** (A) to save your sheet changes. All OpenTable terminals in the restaurant are updated and the "*" column is cleared.

V. Scheduling – Opening and Closing Shifts

Scheduling Wizard

Scheduling Wizard

The Scheduling Wizard helps you open, change, and close shifts in your reservation book. Select the type of scheduling change you want to make. Tap <Next> to continue.

- Open or change a shift**
Open or change ONE shift on a SINGLE day.
- Open or change multiple shifts**
Open or change MULTIPLE shifts on a SINGLE day.
- Schedule a date range**
Change shifts across several days.

- Close a shift**
Close ONE shift on a SINGLE day.
- Close a day**
Close ALL shifts on a SINGLE day.
- Close a date range**
Close ALL shifts across several days.

- Edit default or REGULAR schedules**
Change the default or "Regular" schedules.

Calendar < Back Next > Cancel

Launching the Scheduling Wizard

The easiest way to make most scheduling changes is to use the **Scheduling Wizard**.

1. Tap **Sheet** or **Book** on the Side Navigation Bar to go to one of those views.
2. Tap **Options**, then tap **Scheduling Wizard**.
3. Select the task you want to perform (A) and tap **Next** (B).

Accessing the Calendar View

To make several different scheduling changes across multiple days, use the Calendar View instead. To access the scheduling Calendar View:

1. Tap **Admin** on the Side Navigation Bar. Then tap **Sheets, Floor Layouts, Schedules**.
2. Tap the **Schedules** tab to display the Calendar View.

Setting Up Holidays & Special Events

1. If necessary, create a new reservation sheet for the holiday or special event (see [IV. Editing Reservation Sheets](#)).
2. Launch the **Scheduling Wizard** (see above).
3. Tap the **Open or change a shift** option or the **Open or change multiple shifts** option (A) and tap **Next** (B).
4. Follow the on-screen instructions to complete the scheduling wizard and assign your holiday or special event sheet to the appropriate shift.

Closing a Day or Shift

1. Launch the **Scheduling Wizard** (see above).
2. Tap the **Close a Shift** option or the **Close a Day** option (A) and tap **Next** (B).
3. Follow the on-screen instructions to complete the scheduling wizard.



Shifts with pending reservations cannot be closed.

Opening / Changing a Day or Shift

1. Launch the **Scheduling Wizard** (see above).
2. Tap the **Open or change a shift** option or the **Open or change multiple shifts** option (A) and tap **Next** (B).
3. Follow the on-screen instructions to complete the scheduling wizard.

Setting Default Schedules

Default Schedules are the restaurant's **REGULAR** schedule for each of the seven days of the week (Sunday – Saturday). To set up your defaults:

1. Launch the **Scheduling Wizard** (see above).
2. Tap **Edit Default or REGULAR Schedules** (A) and tap **Next** (B).
3. Follow the on-screen instructions to complete the scheduling wizard.

Symptom

Solution

Black Screen	Check power switch on monitor, power cord connection, and power strip. Make sure that everything is connected.
Touchscreen not responding to your touch	Press Control and Esc simultaneously. Use the arrow key to select "Shut Down" and press enter. Press "R" on your keyboard until you see "Restart" in the picklist. Press enter to restart. Then check all power cords for the computer and monitor to ensure a snug fit.
"No Input Signal" or "Cable Not Connected"	Make sure all cables are securely connected. If the message is still visible, the computer (separate device) might be off. Push the power button on the computer. If it does not turn on, check the power cord connection, located in the back. Also, make sure it is plugged into a working power outlet.
"The system could not log you on"	Your password has been entered incorrectly. Make sure you turn off Caps Lock and Num Lock (all keyboard lights should be off). Check password and try again.
Keyboard typing incorrect characters	Press Num Lock and Caps Lock keys until no green lights (on the keyboard) are turned on.
Keyboard not working at all	Ensure that the keyboard's cord is connected to your computer. Test this by pressing the Caps Lock key. A green light should come on.
"Trouble Connecting to Information Server"	Your connection between computers is most likely down. Ensure the server terminal is on. Restart all computers.
I want to change my schedule but I cannot find the Configuration Tool.	All scheduling and configuration has been redesigned and incorporated into the Admin View (tap "Admin" to access).
I cannot seat reservations for today's shift on the Floor View because it does not display a floor layout.	Tap "Now" on the Top Navigation Bar. Then tap "Floor" on the Side Navigation Bar. Tap "Options" in the lower right part of the Floor View and follow the on-screen directions.
The connection status indicator (top right button on the Top Navigation Bar) shows that I am "Offline".	Tap the button that says "Offline" on the Top Navigation Bar. Then tap the "OpenTable Connection" row and follow the on-screen troubleshooting tips.

Safe OpenTable and Computer Shutdown Procedure

- Press and hold the **Shift** and **F10** keys simultaneously.
- When asked: "Are you sure you want to exit?", tap **Yes**.
- Tap **Start**, then **Shutdown**. When prompted, tap **Shutdown** and then tap **OK**.

To contact OpenTable Customer Support:

