



Create a lead and convert it into a booking

1. Go to the “New Lead” button on the top right of your screen.
2. Add as much information as you have, including the required account and contact, and “Create”.
3. Click on the lead and convert it into a booking. Add any additional pertinent details, and click “Save”.

Signed in as James D | Search Tripleseat... | Help/Question | New Lead | New Booking

Jon Doeeye
Bluewater Hotel North

This lead can be converted to a booking or contact.
[Convert this Lead](#)

Attached files
No Files
[Choose a File](#)

Personal Details [Edit] [Actions -]

Name	Jon Doeeye	Email	jdee@yaya.fake
Company	JDOEINC	Email Opt-in?	No
		Phone	48488484

Booking Details

Location	Bluewater Hotel North	Nature of Booking	Corporate Booking
Arriving On	Wed, Jan 15, 2025	Rooms per Night	100
Departing On	Fri, Jan 17, 2025	People per Room	1
Dates are flexible	No		

Lead Details

Submitted	Mon, Sep 11, 2023 at 1:38 pm	Internal?	Yes
Submitter	James D	Market Segment	Corporate
Owner	James D	Source	Email

Event Details [Discussion] [Tasks] [Notes] [Log]

Event - Arrival Reception

Review our knowledge base article and Tripleseat University video on converting leads.

[Converting leads article](#) ←

[Converting leads video](#) ←

Add a room block

1. While on the “Guest Rooms” tab or editing the booking, click “New Guest Room Block”.
2. Select the room types, add counts, and add rates for occupancy. Ex. 250/250/300/350 = single/double/triple/quad
3. Use keyboard shortcuts, Ctrl+B or Cmd+B to copy room details across the block.

Guest Room Summary (250 Agreed, 250 Blocked, 150 Forecast, 0 Picked Up)

	11/15/2023	11/16/2023	11/17/2023
Agreed	100	100	50
Blocked	100	100	50
Forecast	50	50	50
Pickup	0	0	0

Use Ctrl+B or Cmd+B to copy room details

Allocations (250 Agreed, 250 Blocked, 150 Forecast, 0 Picked Up)

King (150 Agreed, 150 Blocked, 150 Forecast, 0 Picked Up)

	11/15/2023	11/16/2023	11/17/2023
Agreed	50	50	50
Blocked	50	50	50
Forecast	50	50	50
Rate	\$ 250 / 250 / 300 / 350	\$ 250 / 250 / 300 / 350	\$ 250 / 250 / 300 / 350
Pickup			
Available	20	10	55

Review our knowledge base article and Tripleseat University video on adding room blocks.

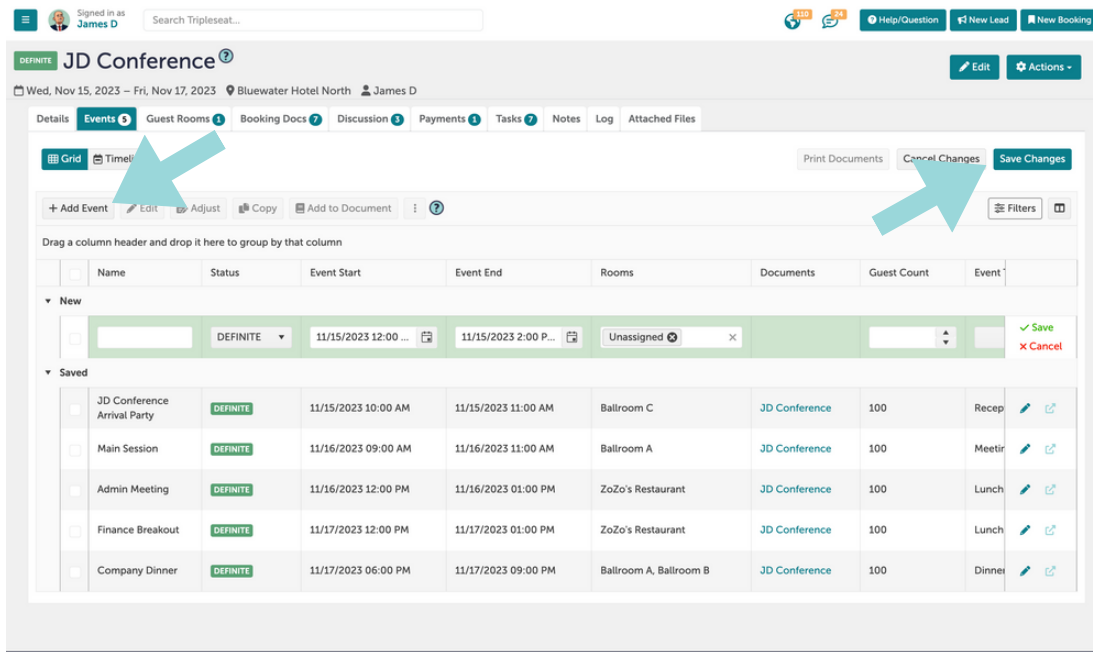
[Adding a room block article](#) ←

[Adding a room block video](#) ←



Add events

1. While on the booking, go to the “Events” tab to access the events grid.
2. Click “+Add Event” for as many events as needed.
3. Fill in event details and “Save Changes”



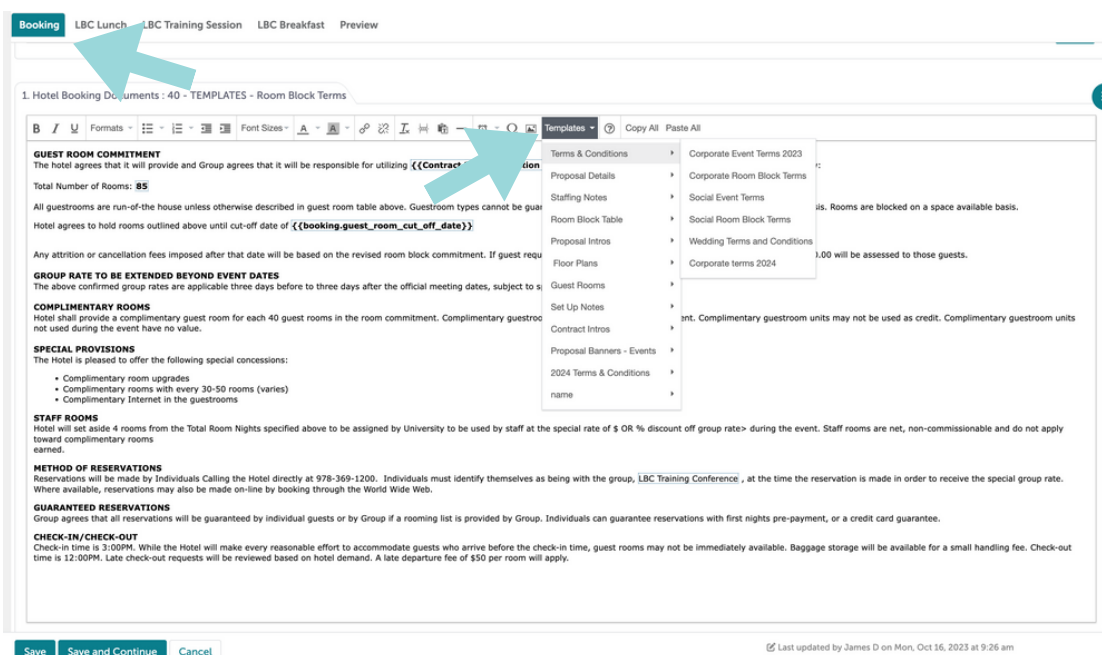
Review our knowledge base article and Tripleseat University video on adding events.

[Adding events article](#)

[Adding events video](#)

Add booking docs

1. Go to the “Booking Docs” tab and click “Add a document to this booking”.
2. Select the set of documents and select all events.
3. From the “Booking” tab, scroll down and select the appropriate terms.



Review our knowledge base article and Tripleseat University video on adding booking docs.

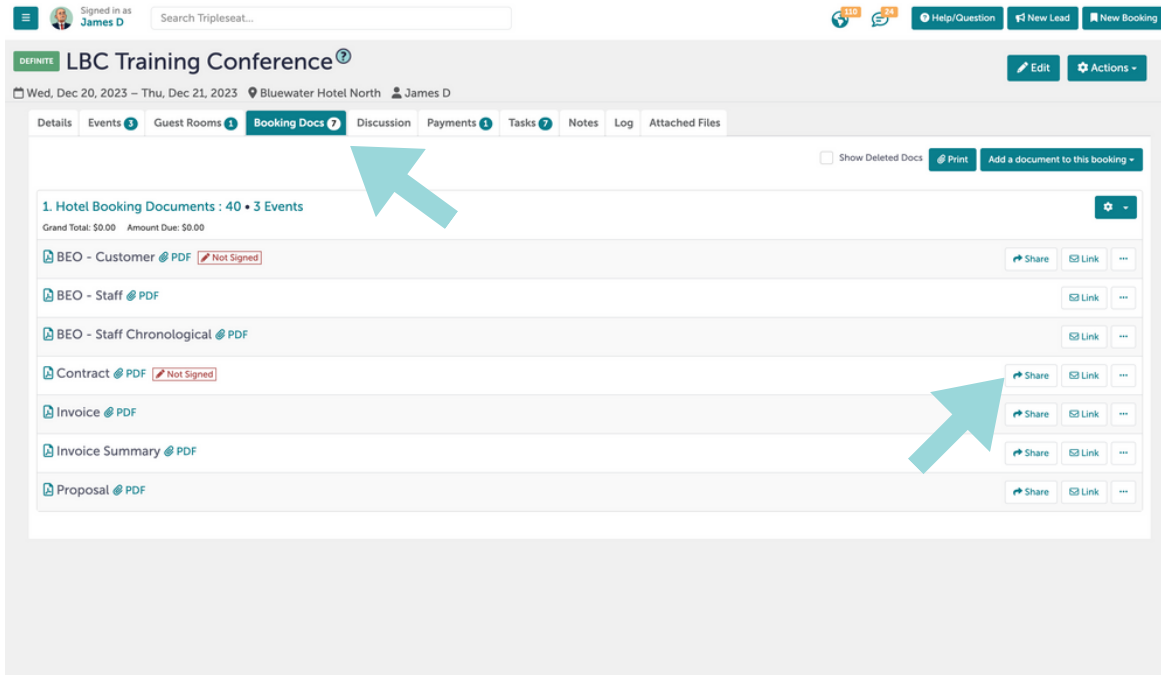
[Adding booking docs article](#)

[Adding a booking docs video](#)



Share a contract

1. Go to the “Booking Docs” tab.
2. To the right of the contract, click “Share”.
3. Select an email template and send.



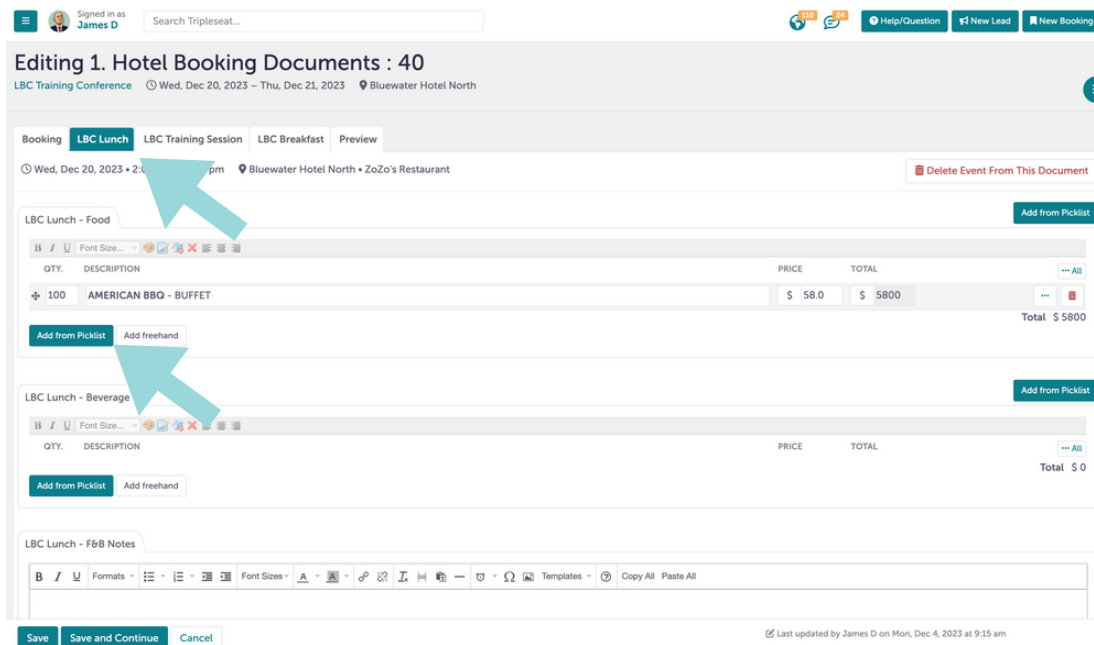
Review our knowledge base article and Tripleseat University video on sharing documents.

[Sharing documents article](#)

[Sharing documents video](#)

Detail your events

1. Go to the “Booking Docs” tab.
2. Edit the document template.
3. On each event tab, Add items from picklists and add notes, then “Save”.



Review our knowledge base article and Tripleseat University video on detailing events.

[Detailing events article](#)

[Detailing events video](#)