

KOBAS RESERVATIONS

Creating a Reservation

When you first take a reservation, this needs to be created, either in Cloud (the Kobas website) or EPoS (your till). If you are just creating the booking with no pre-payment taken, you can use either Cloud/EPoS.

Cloud:

- Go to <https://login.kobas.co.uk> and log in
- Go to Your Customers > Reservations > Create New Reservation
- Follow the instructions on the screen.
- More detailed help can be found here: <https://help.kobas.co.uk/reservations-in-kobas-cloud>

EPoS:

- Go to the till and log in
- Go to Admin > Reservations > Create
- Follow the instructions on the screen
- More detailed help can be found here: <https://help.kobas.co.uk/creating-reservations-on-epos>

On both Cloud and EPoS you will need to store the customers details, and details about the booking. You can add unlimited notes to the booking, including all communication with the guest, and record all details and quotes.

Taking Pre-Payments

If you are taking payment (either when you create the reservation, or later) you will need to decide which way to record this:

- By Bank Transfer (BACS) ... then you must use Cloud
- By Cash, Card in person, Card over the phone, or Cheque ... then you must use EPoS

Cloud:

- Go to <https://login.kobas.co.uk> and log in
- Go to Your Customers > Reservations and find the booking, pressing View at the end
- Go to the Payments Tab and follow the instructions

EPoS:

- Go to the till and log in
- Go to Admin > Reservations > Future
- Find the reservation and press View then Create Payment
- You will then be presented with the familiar "Take Payment" screen where you can use Cash, Card or Other (where you can find Cheque).
- For taking Card payments over the phone, when you press Card in Kobas and the amount goes to the Card Machine, on the Card Machine press the three buttons at the top and choose Cardholder Not Present.

On the day of the event / reservation

Remember that all sales, payments and spends must go through Kobas. Therefore, on the day of the event we need to attach all sales/spends to the reservation, so it can be matched against any pre-payments.

In the morning, on **EPoS**:

- Go to the till and log in
- Go to Admin > Reservations > Today
- Click View next to the reservation and Create Tab in the top right corner.

This creates a new tab that has the same name as the reservation. The tab will also be put in credit to the value of any deposit payments added to the reservation. The tab will show in credit like this:



It is imperative that all items are then added to this tab for which the pre-payment is to be used. We suggest in the morning that you add all pre-booked food onto the tab.

You can then add further items if required to the tab, that can be paid for in addition if required and the tab settled.

Further help

Please visit our Knowledge Base (<https://help.kobas.co.uk/>) for further assistance.

Why not try our e-learning, suitable for all Till Users, Managers and Admins: <https://help.kobas.co.uk/training>

If you need any further help or support, you can contact support@kobas.co.uk