

Managing Reservations

To manage reservations:

1. Select **Administration/Manage Reservations**.
2. Select an association or **all associations** (available if user has access to all associations).
3. Click one of the four tabs to navigate. The following sections outline what is available on each tab.

Pending Reservations

This tab displays any reservations that are awaiting approval. To view a reservation:

1. Click **Details** beside a reservation.

Exhibit 26: Pending Reservations Tab

Manage Reservations

All reservation times displayed in the local time zone of the amenity.

Pending Reservations
Confirmed Reservations
Security Deposits
Reservation History

Association:

Reservation ID	Homeowner Name	Amenity Name	Request Date	Reservation Date	T. Zone	Details
3261	Homeowner	Clubhouse	09/07/2022	9/17/2022 1:00:00 PM	PT	Details

2. The **Reservation Details** screen displays.

Exhibit 27: Reservation Details Screen

Reservation Details

Association:	First Training Homeowners Association
Homeowner Name:	
Homeowner Account Number:	123456
Email:	
Mobile Number:	(555) 555-5555
Reservation Confirmation Number:	3261
Amenity Name:	Clubhouse
Request Date:	09/07/2022 PT
Reservation Date:	09/17/2022 PT
Reservation Window:	01:00 PM to 04:00 PM PT
Payment Amount:	\$300.00 + \$9.75 = \$309.75 (Payment Amount + Payment Fee = Total)
Payment Received:	Yes
Security Deposit:	\$100.00 + \$3.25 = \$103.25 (Deposit Amount + Deposit Fee = Total)
Security Deposit Received:	Yes

Reservation Notes

Date	Notes	Added By
No data to display		

Approve Reservation
Deny Reservation
Close

- Review, then click **Approve Reservation** or **Deny Reservation**. **Approve Reservation** will move the reservation to the **Confirmed Reservation** tab. **Deny Reservation** will move the reservation to the **Reservation History** tab.

Note: On the WebAxis admin dashboard, the pending reservation widget is also available to users with permission, to quickly access this information.

Exhibit 28: Pending Reservation Widget

Pending Reservations

Sender Name	Date
Name: Zach Association: First Training Homeowners Association Amenity: Tennis Courts	5/28/2022

Confirmed Reservations

This tab displays reservations that have been confirmed. To view or update a confirmed reservation:

1. Click **Manage** beside the reservation.

Exhibit 29: Confirmed Reservations Tab

Manage Reservations

All reservation times displayed in the local time zone of the amenity.

Pending Reservations
Confirmed Reservations
Security Deposits
Reservation History

Association: First Training Homeowners Association demo

Reservation ID	Homeowner Name	Amenity Name	Reservation Date	Payment Status	Security De	T. Zone	Manage
3258	Scott Meyer	Clubhouse	9/9/2022 12:00:00 PM	Unpaid	Unpaid	PT	Manage

2. Make desired changes on the **Manage Reservation Details** screen and click **Update Reservation to save**. To cancel the reservation, click **Cancel Reservation**.
3. Click the close button to return to the **Confirmed Reservations** tab.

Exhibit 30: Manage Reservation Details Screen

Manage Reservation Details

Association:

First Training Homeowners Association

Homeowner Name:

Zach Dawson

Homeowner Account Number:

77711904

Email:

notrealemail@afjdkjsfjkdsjaffemail.com

Mobile Number:

(555) 555-5555

Reservation Confirmation Number:

1220

Amenity Name:

Tennis Courts

Space Name:

Court 1

Number of Guests:

1

Request Date:

05/23/2022

Reservation Date:

05/27/2022

Reservation Window:

01:00 PM To 01:30 PM

Payment Amount:

\$50.00 + \$1.63 = \$51.63
(Payment Amount + Payment Fee = Total)

Payment Status:

Paid (5/23/2022 2:47:06 PM)

Payment Received:

Yes

Security Deposit:

\$50.00 + \$1.63 = \$51.63
(Deposit Amount + Deposit Fee = Total)

Security Deposit Status:

Paid (5/23/2022 2:47:08 PM)

Security Deposit Received:

Yes

Notes Type:

☒ Public
 ☐ Internal

Notes:

0 / 7000

Notify Homeowner:

☒

Reservation Notes

Date	Notes
No data to display	

Cancel Reservation

Update Reservation

Close

Security Deposits

This tab displays all security deposit statuses for an association and allows refunds for eligible transactions.

Note: Amenity related charges paid online cannot be refunded to the original payment method more than 21 days after they are processed. If the refund window has expired, please use another method to reimburse the reserving party.

The system allows automatic scheduling of 1-21 days in advance of reservation for a security deposit to be charged (# of days prior to reservation date).

A scheduler runs at 10:00AM each day and will pick up any reservation security deposits to be processed on that day. Enter the number of days and click **Update** to save. To see a history of previous updates to the setting, click **View Log**.

Exhibit 31: Security Deposits Tab

Manage Reservations

All reservation times displayed in the local time zone of the amenity.

Pending Reservations
Confirmed Reservations
Security Deposits
Reservation History

Association: First Training Homeowners Association demo ▼

Security Deposit Auto-Payment Settings: 7 Days Update [View Log](#)

Please Note: When using the date range filter, the system will search reservation records based off the Eastern time zone.

Reservation Date: 8/19/2022 ▼ To: 9/9/2022 ▼ Refresh

Amenity related charges paid online cannot be refunded to original payment method more than 21 days after they are processed. If the refund window has expired, please use another method to reimburse the reserving party.

Reservation ID	Homeowner Name	Amenity Name	Reservation Date	Payment Status	T. Zone	Refund
 ▼	 ▼	 ▼	 ▼	 ▼	 ▼	
3254	John Ringer	Tennis Courts	8/21/2022 6:30:00 PM	Unpaid	PT	
3255	Tonya Davenport	Tennis Courts	8/26/2022 10:30:00 PM	Paid	PT	Refund

Security Deposit Refund

Security deposits eligible for a refund display a **Refund** button. To refund a security deposit:

1. Locate the reservation to cancel.
2. Click **Refund** to process a refund. Only those reservations with a **Refund** button are eligible.
3. Click **Refund**, then click **Refund** on the confirmation popup to make the refund or click **Close** to return to the **Security Deposits** tab without making changes.

Note: When making a refund, you will have the option to select a **Dollar Amount** or **Percentage**.

Exhibit 32: Security Deposit Refund Screen

Security Deposit Refund

Reservation ID:

3255

Homeowner Name:

Homeowner Account:

123456

Reservation Date & Time:

08/27/2022 at 10:30 PM to 11:00 PM PT

Amenity:

Tennis Courts

Payment Amount:

$\$50.00 + \$1.63 = \$51.63$
 (Payment Amount + Payment Fee = Total)

Security Deposit:

$\$50.00 + \$1.63 = \$51.63$
 (Deposit Amount + Deposit Fee = Total)

Refund Method

Dollar Amount ▼

Amount to Refund

\$

Notes Type:

☒ Public
 ☐ Internal

Notes:

0 / 7000

Reservation Notes

Date	Notes	Added By
No data to display		

Refund

Close

Reservation History

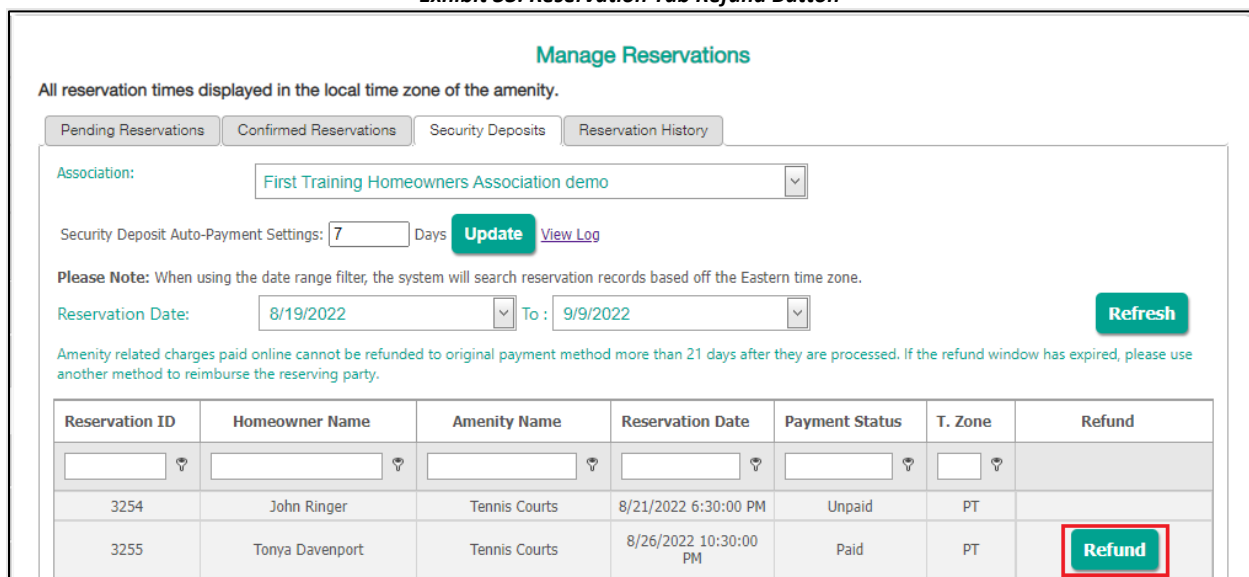
The **Reservation History** tab displays a history of the association's reservations. Click **Details** to see the specifics of a reservation.

Refunding a Reservation Charges

Reservation charges eligible for a refund display a **Refund** button. Refunding a reservation charge is similar to refunding a security deposit. To refund a reservation charge:

1. Locate the reservation to cancel.
2. Click **Refund** to process a refund. Only those reservations with a **Refund** button are eligible

Exhibit 33: Reservation Tab Refund Button



Manage Reservations

All reservation times displayed in the local time zone of the amenity.

Pending Reservations | Confirmed Reservations | Security Deposits | Reservation History

Association:

Security Deposit Auto-Payment Settings: Days [Update](#) [View Log](#)

Please Note: When using the date range filter, the system will search reservation records based off the Eastern time zone.

Reservation Date: To: [Refresh](#)

Amenity related charges paid online cannot be refunded to original payment method more than 21 days after they are processed. If the refund window has expired, please use another method to reimburse the reserving party.

Reservation ID	Homeowner Name	Amenity Name	Reservation Date	Payment Status	T. Zone	Refund
3254	John Ringer	Tennis Courts	8/21/2022 6:30:00 PM	Unpaid	PT	
3255	Tonya Davenport	Tennis Courts	8/26/2022 10:30:00 PM	Paid	PT	Refund

3. Click **Refund**, then click **Refund** on the confirmation popup to make the refund or click **Close** to return to the **Reservation History** tab without making changes.

System Notes for Reservations

System Note Generation

System notes are generated for the following actions in the **Reservations** module. These notes will be saved to the homeowner correspondence record.

- Reservation Requests
- Reservation Approvals/Denials
- Reservation Confirmations
- Reservation Updates
- Reservation Cancellations
- Reservation Payments Online
- Reservation Online Payments Declined
- Reservation Manual Payments
- Security Deposit Payments Scheduled
- Security Deposit Payments Online