

Managing, rebooking and cancelling bookings

Administrative booking in four steps, payment link, cancellation and refund, changing a booking, check-in, messages to guests, parking, customer rebooking in the portal and what the guest sees in the customer portal.

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Creating an administrative booking

Booking system → **Bookings** → **New booking**, four steps:

1. **Product and time slot:** location, offer, price list and category, quantity, date. Minimum and maximum per booking are the values from the offer, at most 500 participants. Past dates are allowed (subsequent entry). If the date is full, Unitlify asks "Book anyway": this blocks the whole slot, also for GetYourGuide.
2. **Customer details:** search for an existing customer or create a new one. First name, last name and email are required.
3. **Participants:** "Booker only" or names individually. Empty lines become placeholders "Last name +1", "+2" ... with their own ticket code. Free accompanying persons are added by Unitlify automatically.
4. **Payment method:** cash, card on site, invoice, voucher, payment link or bank transfer via Stripe (only if active in the shop and enabled for the offer). Discount code and voucher can be combined. If a voucher covers only part, a second payment method is needed (cash, card, invoice). With 100 percent discount or full voucher coverage, payment is skipped and the booking is confirmed immediately.

Cash, card, invoice and voucher confirm the booking immediately. Invoice and payment link remain as an outstanding payment.

Payment link

The guest receives an email with a link to the customer portal and pays there by card, Apple Pay, Google Pay or PayPal (depending on what is set up). The deadline is defined in the offer ("Payment deadline for payment link", default 48 hours), but ends at the latest on the day before the date. Halfway through the deadline a reminder is sent, after expiry the booking is automatically cancelled and the seat is released.

If the offer has no online payment method in the shop, the form warns you: the link would lead nowhere.

A booking with an outstanding amount cannot be set to "Confirmed" by hand. Record the payment first with **Record as paid**.

Cancellation and refund

In the booking via **Cancel**: the seat is released, vouchers purchased with the order are cancelled, the invoice receives a cancellation credit note. The dialog then asks about the refund:

- **Scope**: full amount, freely entered amount or individual items. Partial refunds up to the outstanding remainder are possible. A rebooking fee is not refunded.
- **Stripe** (card, wallets, Klarna, SEPA, bank transfer): Unitlify refunds directly.
- **PayPal**: Unitlify cannot refund via PayPal. The payment is marked as "Refund pending"; you refund in your PayPal account and confirm this afterwards in the booking.
- **Cash, invoice**: only recorded.
- **Refund as value voucher**: no money flow, the guest receives a voucher with the statutory minimum validity.
- **Refund only** (without cancellation) keeps the date.

Bookings via GetYourGuide, Jochen Schweizer and other partners cannot be cancelled, changed or refunded in Unitlify. This is done via the respective portal.

The bulk action **Cancel** in the booking list cancels several bookings at once, but does not refund automatically. With "Offer rebooking instead of refunding", the ticket remains valid and the guest chooses a new date in the portal.

Changing a booking

Tab **Change booking**: offer, category, date and quantity (up to 50). The new price is category price × quantity minus previous discount and voucher; extras are not taken into account. An additional payment or a credit is **displayed, not posted automatically**: additional payment via payment link or on site, credit via refund.

Alternative: a **date proposal** that the guest accepts or declines in the portal.

Participant names cannot be edited directly. They come from the participation declaration and replace the next placeholder. Notes per participant and on the booking are possible.

Check-in

Every ticket has a QR code and a barcode per participant. Check-in is done in the booking in the tab **Check in** (individually, all, no-show, check out) or in the app by scanning, with verification of ticket code and last name. Only a confirmed booking can be checked in.

The scanned QR code leads to a verification page that shows validity and status and links to the booking. The verification page alone does not check anyone in.

Messages to guests

- **Individual message** in the Messages tab of the booking: email with a link to the customer portal. For GetYourGuide bookings, it goes via the GYG forwarding address.
- **Bulk message** from the booking list: to all selected bookings, with placeholders for first name, last name, ticket, reference and portal link, optionally with a template from the email designer. Cancelled bookings, Jochen Schweizer bookings and bookings without their own email address are skipped.

Parking a booking

Bulk action **Park**: status "Parked", the seat is released, ticket and voucher remain valid. The guest receives an email with a portal link and chooses a new date there themselves. After that, the booking is confirmed again and the confirmation is sent out once more. Suitable when a date is cancelled (weather, technical issues).

Customer rebooking in the portal

In the offer under **Rebooking**: "Allow self-rebooking", deadline in days before the date, maximum number per booking, fee (free, flat rate or time-staggered) per booking or per participant, whereby free accompanying persons and marked categories do not count.

The guest sees a calendar in the portal with the free dates of the same offer. Without a fee, the rebooking is done immediately; with a fee, a request is created that they pay within 30 minutes via Stripe or PayPal. Weekday rules, capacity and resources apply as in the shop.

Only the date is rebooked. **The price is not recalculated**, even if the new date costs differently. Not possible for partner bookings, with an open payment link and for past dates.

Customer portal

Every confirmation email contains the link to the customer portal. There the guest can:

- download the ticket PDF (only for confirmed bookings), calendar file, invoice and credit notes
- settle an outstanding payment (payment link)
- fill in the participation declaration
- read messages and accept or decline date proposals
- rebook themselves or choose a new date after parking
- change the number of people for exclusive tickets

A withdrawal is not provided for in the portal; the statutory right of withdrawal exists only for voucher purchases via the link in the voucher email.

The guest does not see internal notes and remarks on the booking in the portal.

Troubleshooting checklist

- **Payment link leads nowhere:** the offer has no enabled online payment method.
- **Booking cannot be confirmed:** outstanding amount, first "Record as paid".
- **PayPal refund does not reach the guest:** refund in PayPal yourself, Unitlify only marks it.
- **Cancelling blocked for GYG/JSMD:** intended, cancel in the partner portal.
- **Guest cannot rebook:** deadline exceeded, maximum reached, booking not confirmed or partner booking.
- **Price difference after change is missing:** it is displayed but not posted automatically.