Frequently Asked Questions

Accessing TripleseatDirect

Q: How can I activate TripleseatDirect?
A: You must have an online payment integration set up in Tripleseat for each location that wants to utilize the TripleseatDirect feature, as well as having event styles enabled on your Tripleseat account.

Q: How can I give users access to the TripleseatDirect section in settings?
A: You can manage which users have access to TripleseatDirect settings by customizing user roles. You will see the options listed under the settings section when editing an existing user role or creating a new role.

Settings and Configurations

Q: Why are my default settings unable to be edited?
A: Only Customer Admins of your group are able to edit the default configuration settings for TripleseatDirect. If you need to adjust default settings, please reach out to your Customer Admin.

Q: Can I override my TripleseatDirect default settings for specific locations?
A: Yes. Go to Settings > TripleseatDirect > Configure and select the specific location from the dropdown menu. You will then be able to select the checkbox "Override defaults" to set individual settings for event duration limits, lead time limits, deposits, and blackout dates.

If you have access to multiple locations that need similar settings, you can select "Copy to" once you have changed the default settings to apply them to other locations.

Please note: The Billing Details and F&B Minimum section cannot be overridden for specific locations and can only be managed by a Customer Admin.

Q: Can I set different available hours for TripleseatDirect for each location?
A: Yes. Go to Settings > TripleseatDirect > Location Hours.

Q: How can I limit the rooms that should be available for TripleseatDirect?
A: This is done per the Direct Forms. Go to Settings > TripleseatDirect Forms > Edit next to the form you want to change. On the right, where it shows your location name(s), click the "+" button next to each location. From here, you can select the rooms you want available or unselect the rooms you want to be unavailable when the customer is using that specific TripleseatDirect form.

Q: My on-premise events and my catered events have different taxes and fees, where do I adjust this?
A: In your Configuration Settings you can select which billing details should apply to which event style.

Please note: If you have more than one location and your locations have different billing details, check off **ALL** billing details that apply for all locations.

Q: Can users receive email notification when a TripleseatDirect event is submitted?
A: Yes. At the bottom of each TripleseatDirect form there is an option at the bottom to select which users should receive an email notification any time an event is submitted.

Q: Can I set blackout dates for specific rooms or event styles?

A: In order to do this, you will need to utilize calendar notes within Tripleseat. Go to whichever day you would like to set a calendar note and choose which locations, rooms, or event styles you would like the calendar note apply to **and** check off "Prevent bookings for the duration of this note" so customers cannot book an event on that day.

Menus and Forms

Q: Can I require a modifier selection for a menu item?

A: Yes. On that menu item, click on the modifier group tab. Press edit on the modifier group you want to require a selection for and you will see there is an option for minimum and maximum selection for the modifier group.

Q: I need to build a package or prix-fixe menu.

A: To build a package or prix-fixe menu, you will use the package section by navigating to Settings > Documents and Menus > TripleseatDirect Menus and selecting the Packages tab. Once you add basic package information, you will create item groups for the various sections/courses and then add items. Items in packages can have modifiers. Check out our quick tutorial video on packages here.

Q: I added a menu but it is not populating on my public forms.

A: Once a menu is created, you will want to add it to the forms it should populate on. Go to Settings > TripleseatDirect Forms > Edit and scroll to the menu section. Here you will select all menus that should populate for that form.

Q: How can I set an F&B Minimum for my TripleseatDirect events?

A: There are two ways to configure setting minimum spending amounts for TripleseatDirect Events. The first way is to go to Settings > Advanced Location Settings > F&B Minimum tab. Here, you can set up dynamic F&B Minimum amounts for each location, event style, and, if applicable, rooms for specific weekdays and time periods. Guests will be able to submit an inquiry with an unmet minimum, regardless if "Skip Menu Selections" has been enabled.

The second way is in your TripleseatDirect Form Settings, where you can set specific minimums per event style on each of your Forms, and your customer will not be able to submit their TripleseatDirect inquiry until their menu items have met this amount unless "Skip Menu Selections" has been enabled.

Please note: Any minimums entered on the TripleseatDirect Form level **will override** any configured F&B Minimums in Advanced Location Settings.

Q: How do I determine what counts toward the F&B Minimum on a TripleseatDirect event?

A: Go to Settings > TripleseatDirect > Configure and scroll to the Billing Details section. Here, you will need to select which Menu Item Categories will contribute to your F&B Minimums created in Advanced Location Settings. This needs to be done per event style. You will also need to determine which Billing Details will apply to your unmet minimum amounts. This can only be configured on the Default level for all locations, so make sure you select all that would apply. Minimums on the TripleseatDirect Form level will count all items toward the minimum.

Q: Why can't I see the Menu Selections tab on my TripleseatDirect event in Tripleseat?

A: Please check your profile settings by clicking on My Profile. Scroll to the bottom and ensure "Menu Selections" is checked off under Event Tabs, and then click Save. This should be done for all users in your group.

Q: Can I give my customers the option to submit an event request without making menu selections?

A: Yes. By toggling "Skip Menu Selections" off underneath the form minimums, guests can complete the booking process by agreeing to only the booking minimum and will have the option to skip having to choose from a menu.

Q: How can I limit the menus my guest sees based on the time they select for their event?

A: Creating meal periods within Advanced Setting Locations and then applying them to your TripleseatDirect menus will only allow your guests to access the menus based on the time and day they submitted on the TripleseatDirect form. Watch **this video** to learn more on how to set up meal periods.

Q: I applied meal periods to my menu but they still aren't showing correctly on my form. How do I fix this?

A: Make sure the menu you are applying meal periods to is enabled for the same location that has those same meal periods. Then cross-check that your form is also checked off for the same location(s). Finally, make sure all of your menus are using meal periods! Any menus with no meal periods selected will appear on your forms no matter the time an event is submitted.

Q: Some of my rooms are not appearing as options on my live TripleseatDirect Form.

A: If the event style being selected for the Form is either On-Premise or Large Party Reservation, go to Settings > Locations > Edit Room Details and double-check which allowed event style is selected for each room. If a room is selected for only Large Party Reservation or On-Premise, the room will not be selectable if the guest selects the opposite event style on the Form or if the Form is only enabled for one of the event styles. You can also check when editing your Form's settings and expand the locations to make sure each of the rooms is checked off.

Q: Can I make it so guests do not have to select a room for an event?

A: Yes. When you create a TripleseatDirect Form, you must select "Large Party Reservation" as one of the applicable event styles. This will enable a new section in Form Settings to appear, where you can set a maximum guest count and also toggle the "Skip Room Selection" option. When this is disabled, guests can submit an event inquiry for a Large Party Reservation, and the event will appear as "Unassigned." You will need to place the event in a room upon accepting the event.

Please note: If you have "Skip Room Selections" enabled and are also using F&B Minimums in Advanced Setting Locations, a best practice would be to set a minimum spending amount on the Form level for the Large Party Reservation event style so guests still have to adhere to a booking minimum.

Q: How can I duplicate a TripleseatDirect form?

A: On the Forms page, select the gear icon next to any form and select the option "Duplicate."

Q: Can I customize my TripleseatDirect forms to align with my branding?

A: Yes. There are many ways to customize forms. Edit any form to be able to change guest-facing labels, font styles and colors, as well as background and accent colors. You can also put your logo on any Tripleseat Direct form as well as a banner image.

Q: Where can I change the automatic emails that are sent out for TripleseatDirect requests?

A: Each form's settings have three different Auto Response emails that you can adjust. Scroll down to "Auto-Response Email" to customize the subject lines and email bodies for any of three options.

Q: Where can I add my terms and conditions to my TripleseatDirect forms?

A: In your TripleseatDirect Form Settings, you can add your TripleseatDirect terms and conditions in the page setup section. Customers can accept or decline these when filling out an event request.

Additional Questions

Q: Can I link TripleseatDirect to EventUp?
A: Yes. Go to Settings > EventUp > Edit > Miscellaneous Details of the specific venue you want to connect with TripleseatDirect. Select the TripleseatDirect form from the dropdown menu so that when someone visits your EventUp listing page, they will see a "Book Now" button that will direct them to your form.

Q: Why can't I see the documents that were automatically created on my TripleseatDirect event?
A: This has to do with your User Role Settings. Navigate to Settings > User Roles, and click into any user roles that should have access to Documents to grant access. Once in the User Role, scroll to the bottom and find the TripleseatDirect Template, make sure you click off both the template, as well as the layouts to the right, before clicking Save.

Q: Why can't I see menus?
A: This has to do with your User Role Settings. Navigate to Settings > User Roles, and click on any user roles that should have access to Menus to grant access. Once in the user role, scroll to Settings and under "Which documents and menu sections users will have access to," check off Menus and click Update.

Q: Can I report on my TripleseatDirect events?
A: Yes. There are three types of reports you can run for TripleseatDirect events: details, submissions, and menu items and packages. In your TripleseatDirect Form Settings page, there is also a column labeled "Forms Submitted" which tracks the event submissions for each form.

Q: Where can I view my pending TripeseatDirect events?
A: On your Dashboard in Tripleseat, there is a section "New TripleseatDirect Events" where you can either accept or reject event submissions.