

---

**WebReserv Quickstart Guides**

**How to setup your**

**Bed & Breakfast booking system**

---

## Introduction

WebReserv.com is a highly configurable booking system. It can be used for virtually any type of bookings that you need for your business.

This manual describes how to set up the your Bed & Breakfast booking system using WebReserv.com. The set up process is fairly straightforward and the system is designed to seamlessly get you through the process with an end result being a fully functional booking system for your Bed & Breakfast. It is recommended that you take the following steps when setting up your bookings:

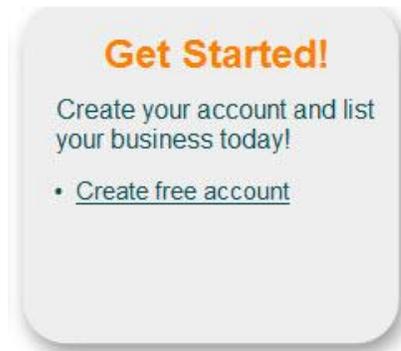
- Create one room set up first.
- Enter rates for the room.
- Create a couple of test reservations to become familiar with the reservation process and email notifications.
- Adjust settings
- Create remaining rooms.

Following these steps will help you learn the system and give you the opportunity to make adjustments to the first product, so moving forward with additional products will be easier.

So, let's begin!

## Creating an account

Your first step is to create your WebReserv.com account. Go to [www.webreserv.com/start](http://www.webreserv.com/start), locate the Get Started box, and click on "Create free account".



**Figure 1 – Create account**

The system will take you through an initial set up process to enter your business information.

**Step 1:** Enter basic information about your business including name, address, web site address, and email address.

**Step 2:** This step allows you to select the category and subcategory for your business. Select **Lodging** as the category and **Bed & Breakfast Inns** as the subcategory. Click **Continue**.

---

## WebReserv Setup - Step 2 of 5

Please select the appropriate business category for your business.

This information is used to categories your business on WebReserv and is also used to configure your WebReserv setup correctly.

When you have selected the appropriate category click **continue** to continue.

Category:  ▼  
Select the main category for your business. If no categories match, please select **other**.

Subcategory:  ▼  
Select the sub category. If no sub categories match, please select **other**.

**Figure 2 – Category Set up**

**Step 3:** This step is not needed for Bed & Breakfast systems and it's automatically skipped.

**Step 4:** This step allows you to set up your rooms and rates for each room. Enter the name of your rooms and the rates for each rate category. If a rate category doesn't apply to your business, simply leave it blank.

You will also have an opportunity to provide more information about your rooms including descriptions and pictures later on.

Once you have included all the information, click **Continue**.

## WebReserv Setup - Step 4 of 5

Please enter the rates for your room(s) in the columns below.

If you have more units, rate categories or rates than specified below, don't worry. You will have the ability to add more products and rates later. You will also have the ability to add seasonal rates later.

When you have entered your rates click **continue** to continue.

| Rates            |          |                                      |                                      |                                      |                                    |                                     |
|------------------|----------|--------------------------------------|--------------------------------------|--------------------------------------|------------------------------------|-------------------------------------|
|                  |          | Weekdays<br><a href="#">(Change)</a> | Weekends<br><a href="#">(Change)</a> | Holidays<br><a href="#">(Change)</a> | Weekly<br><a href="#">(Change)</a> | Monthly<br><a href="#">(Change)</a> |
| Room(s):         | # Units: | Rate per day                         | Rate per day                         | Rate per day                         | Rate per week                      | Rate per month                      |
| Hoover Room      | 1        | \$ 75.00                             | \$ 100.00                            | \$ 125.00                            | \$                                 | \$                                  |
| Washington Suite | 1        | \$ 120.00                            | \$ 150.00                            | \$ 195.00                            | \$                                 | \$                                  |
| Lincoln Room     | 1        | \$ 90.00                             | \$ 115.00                            | \$ 140.00                            | \$                                 | \$                                  |
| Adams Room       | 1        | \$ 75.00                             | \$ 100.00                            | \$ 125.00                            | \$                                 | \$                                  |
| Roosevelt Suite  | 1        | \$ 175.00                            | \$ 225.00                            | \$ 285.00                            | \$                                 | \$                                  |

Rates listed above are: Per unit

Currency: USD - U.S. Dollar

[Back](#) [Continue](#) [Skip this step](#)

Figure 3 – Room and Rate Set Up

The initial set up is now complete, great job! Next, you will provide business information about your bed & breakfast.

### Set up Business Information

So far, you have completed a portion of this information, such as the name of the bed and breakfast, address, and contact information. In addition, the system knows the category of your business – Lodging – Bed & Breakfast Inns, and your rooms and rates.

Log into your account, go to **Setup – Business Information** to add more important information about your business including pictures, terms & conditions, and payments.

Click on **Pictures** in the left navigation bars so you can upload photos of your bed & breakfast. It is highly recommended that you upload several shots of the inn. This will give your customers the opportunity to see the house, its amenities, and natural settings. Customers are more likely to book from you if they can see a picture of your place.

## Pictures

On this page you can add pictures of your business.

| Pictures  |               |              |        |
|---|---------------|--------------|--------|
| Picture:  | Display order | Description: |        |
|  | 1             |              | Delete |

### Add Picture

You can have up to 10 pictures.

To upload another picture enter the filename or click the *browse* button. When you have selected the file, click the *upload* button.

Filename:

**Figure 4 - Bed & Breakfast pictures**

The next section is **Terms & Conditions**. Here is where you can relay all the policies and rules of your inn as well as reservation and cancellation policies. It is important that customers know the “small print”, so there is no question about how you run your Bed & Breakfast, and guests know what to expect when they arrive at your place.

## Terms & Conditions

Use the Terms & Conditions field to describe reservation, cancellation and refund policies. The customer is required to accept your Terms & Conditions when making a reservation.

### Terms & Conditions

Reservation Policies

\*Check in time is 1:00PM, Check out time is 11:00AM

\*We accept cash, checks, and credit cards including Visa, MasterCard, Discover and American Express. We also accept payments via PayPal.

\*A deposit of 50% of the total is due upon booking. The deposit will be partly refunded if you must cancel or change your reservation two weeks before the date of your arrival. If the rooms can be rebooked, you will receive total deposit back less credit card fees.

\*Smoking is not permitted inside the inn.

---

## Figure 5 – Terms & Conditions

The next page allows you to set up what form of payments your bed & breakfast will accept. You will choose how you will process payments for the bookings.

For more information on your options for online payments, go to <http://www.webreserv.com/articles/20090128>.

In addition, if you want to take credit cards, you need to use a merchant account provider that is compatible with WebReserv.com. To find a compatible merchant account provider or gateway, go to <http://www.webreserv.com/recommended-merchant-account-providers.do>.

### Payments

On this page you can specify payment options for this business.

#### Currency

Select the currency being used for this business.

USD - U.S. Dollar

#### Payment Processing

Select how you want payments to be processed when a booking is made.

- Cash/Check** Select this option if you process payments on your own, for example, by receiving a check from the customer. You will need to send instructions to the customer describing how to transfer the payment.
- PayPal** Select this option if you want to use PayPal for payments. To use this option, enter your PayPal email address below.
- PayPal email address:
- Cancel unpaid reservations:
- Bank Transfer** Select this option if you accept bank transfers. You will need to send instructions to the customer describing how to transfer the payment.

## Figure 6 - Payments

- Creditcard** Select this option if you want to accept creditcards and select processing type below.
- Capture only** Select this option if you want to receive creditcard information with the reservation, but process the transaction using your own terminal.
- Auto process** Select this option if you want customer creditcards to be processed automatically when a reservation is made. Note: This function requires gateway setup as specified below.
- Do not ask for credit card details if payment balance is zero.

#### Accepted Creditcards (for Creditcard Capture and Processing)

Select the creditcard types that you accept.



#### Security Code (CVV)

Security Code:

## Figure 7 – Credit Card Processing

---

Great job! You have successfully set up all your business information. Now let's discuss creating the set up for your rooms at the Bed & Breakfast.

## Creating your bed & breakfast bookings

In WebReserv.com, creating bookings for your Bed & Breakfast consists of the following information:

- The products offered – name and description of the rooms, pictures, reservation rules.
- Reservation type – describes how the rooms can be booked.
- Rates or prices – describes what a room will cost.

To create a booking, log on to your WebReserv.com account and select **Setup – Products & Reservation Rules**. Since you have already set up your rooms during initial set up, choose the first room you want to work with and click **Edit**.

### Products & Reservation Rules

Select a product to edit from the list below or click **Add product** to add a new product.

| Room Types:                      |         |           |              |   |
|----------------------------------|---------|-----------|--------------|---|
| Name:                            | Type:   | No units: | Description: |   |
| <a href="#">Adams Room</a>       | Nightly | 1         |              | <input type="button" value="Edit"/> <input type="button" value="Delete"/> |
| <a href="#">Hoover Room</a>      | Nightly | 1         |              | <input type="button" value="Edit"/> <input type="button" value="Delete"/> |
| <a href="#">Lincoln Room</a>     | Nightly | 1         |              | <input type="button" value="Edit"/> <input type="button" value="Delete"/> |
| <a href="#">Roosevelt Suite</a>  | Nightly | 1         |              | <input type="button" value="Edit"/> <input type="button" value="Delete"/> |
| <a href="#">Washington Suite</a> | Nightly | 1         |              | <input type="button" value="Edit"/> <input type="button" value="Delete"/> |

**Figure 8 – Products (Room Types)**

On the description page, create a unique description of the room and click **save and continue**.

## Description (Adams Room)

Enter name and description for this product.

Name\*:

Description:

Show in booking calendar:

**Figure 9 – Name and Description**

On the reservation type page, select **Nightly Reservation** and then **save and continue**.

## Reservation Type (Adams Room)

Select the reservation type.

**Daily Reservation**

Use this setting if reservations are made on a daily basis, i.e. one or more days.

Example: From:   To:

**Nightly Reservation**

Use this setting if reservations are for overnight stays, i.e. one or more nights.

Example: From:   To:

**Figure 10 - Reservation Type**

Next, you will upload pictures of the room. Again, this is an important aspect of your bookings. Customers will appreciate seeing the room that they will book. Be sure to include photos of the bed, bathroom, and any neat features of the room – any image that will appeal to the customer and encourage them to book this particular room.

## Pictures (Adams Room)

You can have up to 10 pictures of this product.

| Pictures  |        |              |        |
|---|--------|--------------|--------|
| Picture:  | Order: | Description: |        |
|  | 1      |              | Delete |

To upload another picture enter the filename or click the *browse* button and select a picture. After selecting the picture, click the *upload* button.

Filename:

Figure 11 - Pictures

When you have added the pictures, click **Save and continue**.

The next screen includes all the reservation rules. The most important rule is the availability/inventory calculation. For your rooms, you will enter the number of units (i.e. rooms) that you have available for each room type (i.e. Adams Room). Most likely, you will only have one unit, so you will enter "1" in the Number of units field.

## Reservation Rules (Adams Room)

### Availability calculation

Use this setting to specify how WebReserv should calculate and manage your availability. If your capacity is determined by the number of units (example: boats, rooms), select **units** and enter the number of units available. If your capacity is determined by number of people that can be reserved at any given time (i.e. seats in a bus) select **people** and enter the maximum number of people.

Availability is based on\*:    
Number of units (or people)\*:

Figure 12 - Number of units

In addition, this page allows you to set up the rules regarding the length of reservation. You can specify weekday, weekend, and holiday rules. For example, if you require a 2 night minimum stay on weekends at your Bed & Breakfast, here is where you will set up that rule. Once you set up all the rules, click **Save and continue**.

### Length of reservation

If there is a minimum or maximum length for the reservation, enter it in the fields below. Otherwise leave the fields blank.

|                                |  |             |
|--------------------------------|--|-------------|
| Minimum length of reservation: | <input type="text"/>                         | Minute(s) ▼ |
| Maximum length of reservation: | <input type="text"/>                         | Minute(s) ▼ |
| Weekends minimum length:       | <input type="text" value="2"/>               | Day(s) ▼    |
| Holidays minimum length:       | <input type="button" value="Edit Holidays"/> |             |

Figure 13 – Length of reservation

The next page, Customer Information, shows you what information is requested from the customer at the time of booking. You do not need to change anything on this page, simply click **Save and continue**.

### Customer Information (Adams Room)

Specify what information is requested and/or required when from the customer when a new reservation is made.

|                 |   |
|-----------------|---|
| Customer name   | <input type="radio"/> Dont ask <input type="radio"/> Optional <input checked="" type="radio"/> Required |
| Company name:   | <input type="radio"/> Dont ask <input checked="" type="radio"/> Optional <input type="radio"/> Required |
| Address:        | <input type="radio"/> Dont ask <input type="radio"/> Optional <input checked="" type="radio"/> Required |
| Phone number:   | <input type="radio"/> Dont ask <input checked="" type="radio"/> Optional <input type="radio"/> Required |
| Email address:  | <input type="radio"/> Dont ask <input type="radio"/> Optional <input checked="" type="radio"/> Required |
| Room selection: | <input checked="" type="radio"/> Dont ask <input type="radio"/> Optional <input type="radio"/> Required |
| Agent:          | <input checked="" type="radio"/> Dont ask <input type="radio"/> Optional                                |
| Comments:       | <input type="radio"/> Dont ask <input checked="" type="radio"/> Optional                                |
| Office Notes:   | <input checked="" type="radio"/> Dont ask <input type="radio"/> Optional                                |

Figure 14 - Customer information

Next, you can set up automatic email notifications to your customers. You are able to set up emails for pending, confirmed, declined, and cancelled reservations as well as a pre-visit email and a post-visit email.

These notifications can be customized to send to your customers. For help on setting up templates go to <http://www.webreserv.com/setuptemplatelist.do> or you can access it by logging in to your account and go to **Setup – Templates** on the WebReserv.com site.

Once you customize the emails, click **Save and continue**.

## Automatic Email Notifications (Adams Room)

Here you can select and preview the emails that will be sent to the customer when a reservation is made or changed.

[Click here](#) to view and modify email templates.

|                  |  |
|------------------|--|
| Pending email:   | <input type="text" value="Pending Reservation"/>     |
| Confirmed email: | <input type="text" value="Confirmed Reservation"/>   |
| Declined email:  | <input type="text" value="None (no message/email)"/> |
| Cancelled email: | <input type="text" value="None (no message/email)"/> |

The previsit and postvisit emails are optional emails that can be sent to your customers automatically before and/or after the visit/rental period.

The *previsit* email can be used as a friendly reminder of driving directions, clothes or equipment to bring, weather etc. The *postvisit* email can be used as a friendly reminder for your customers to write a review of your business and come back again later.

|                   |  |
|-------------------|--|
| Pre-visit email:  | <input type="text" value="None (no message/email)"/> |
| Post-visit email: | <input type="text" value="None (no message/email)"/> |

**Figure 15 – Automatic Email Notifications**

On the next page, you will set up your tax rate as well as the deposit rules for your bed & breakfast. Click Edit Tax Rates to set up the tax to be added to the room cost. Click Save and then Close to return back to the Tax/Deposit page. Here you will select the tax rate that you just set up to be added to the reservation cost of this room.

## Setup Taxrates

Enter the tax rates that will be used for your business.

|                          | Title:      | Taxrate: |
|--------------------------|-------------|----------|
| <input type="checkbox"/> | CA tax rate | 7.75     |

**Figure 16 – Tax Rate set up**

## Tax/Deposit (Adams Room)

Specify tax and deposit information for your product and any additional charges.

### Tax calculation

|           |  |   |
|-----------|--|---|
| Tax rate: | <input type="text" value="CA tax rate (7.75%)"/> | <input type="button" value="Edit Tax Rates"/> |
|-----------|--|---|

**Figure 17 – Tax Rate selection**

---

Also on this page, you will include a deposit for a reservation, if applicable. You can also write text about the deposit that customers will see when making their reservation. Once you are satisfied with the tax and deposit set up, click **Save and continue**.

#### Reservation Deposit

The deposit amount (or percentage) is the amount the customer is required to pay at the time of reservation.

Deposit Rule:  ▼  
Deposit percent:  %

#### Deposit information

The deposit information is shown to customers when making a reservation.

Deposit information:

**Figure 18 – Deposit**

## Test the Reservation

You are now ready to test the reservation. Click **Frontdesk** in the main menu and then select **New reservation**. You can choose the dates of the stay and the number of people. Click **recalculate** to see the total amount.

## Reservation (New)

### Reservation Details

Status: New  
Reserved: 10/30/11 10:54 PM  
Agent: jane@doe.com  
Room Type: Adams Room ▾  
Room\*: From: 1 ▾ From: 11/4/11  To: 11/6/11  Persons: 2

### Rate Details

| Description                           | Linetotal (USD) |
|---------------------------------------|-----------------|
| Rate                                  | 200.00          |
| Subtotal                              | = 200.00        |
| Tax (7.75%)                           | + 15.50         |
| <b>Total</b>                          | <b>= 215.50</b> |
| Deposit due at reservation USD 107.75 |                 |

Tip: Click Recalculate after changing date/time and adding or removing charges and discount.

**Figure 19 – New reservation**

Congratulations! You have successfully set up your bed & breakfast booking. Now that you see the process with one product, you can begin to add additional products using the same steps as outlined above.

---

## Getting the most out of WebReserv

The WebReserv booking system includes numerous features and functions that make setting up all aspects of your business easy. It is highly customizable to meet all the nuances of your unique business. Let's discuss one of these features now.

### Custom Fields

In addition to booking rooms at your Bed & Breakfast, you might also offer additional services that enhance your customer's stay, such as a meal plan or a laundry service. The system allows you to add these custom features to the system to include rates and descriptions. Go to **Setup – Custom Fields** choose **Add new custom field**. You will be taken to a page that allows you to choose the type of information you want to include in this custom field. For these added features, the **List** option works best.

#### Edit custom field (New)

To create a new custom field, please select the type of information:

**Text**

The text field is the most common field type. In this field your customer can enter any type of information.

Example:

Company Name:

**Number**

Use the number field to enter numbers only.

Example:

Born year:

**Yes/No**

The yes/no field can be used if you want a yes/no answer from the customer.

Example:

Include child seat:  Yes  No

**List**

The list enables the user/your customer to select an option.

Example:

No equipment (free)

**Figure 20 – Custom Field**

Next, you will enter the information on your added features. You will be able to include a description as well as the price. When listing the items, it is always best to include “None” or “No, thanks” as the first item. Then it will become the default item, so if customers do not want any added products, they do not need to deselect an item.

Another important note when creating the list is if your customers are able to choose more than one of the particular add on, such as, meals for two days, it is best to include a count of the items in the list. For example, if a customer books a room, and you also offer breakfast and /or dinner at additional cost each day, you would want to include a count of the meals your guest can choose from, so your customers can purchase meals to accommodate multiple nights they will be at your Bed & Breakfast. See example below. Once you have entered all the information, click **Save and continue**.

#### Edit custom field (New)

Provide a name for this field. The name should not be longer than 40 characters, and should describe the content of the field. Example: *Company Name*

Name\*:

Selection label:  Optional: If provided, this label will be used instead of the name when this option is selected.

Rate label:  Optional: If provided, this label will be used instead of the name in rate details

Description:  Description if optional. If entered, the customer can view it by clicking a "more" link next to the field

Enter the options for this selection list in the field below. One option per line.

Options\*:

Tip: You can now specify a price for one or more items in the list, the price will be added to the total before tax calculation. To add a price to a line item, include the price in square brackets with no dollar sign. Example: *Scuba Equipment [9.95]*

**Figure 21 – Custom Field information**

Once you create your custom field, you then have to associate the items to your product, so customers can add the items to their reservation. To do this, go to **Setup – Products & Reservation Rules – Product – Customer Information**. You will choose **Required** as the option for customers.

#### Custom Fields

Additional customer information fields. [Click here](#) to create or modify custom fields.

Meal Plan:  Dont ask  Optional  Required

**Figure 22 – Add Custom Fields to Products**

When a customer is booking a room at your Bed & Breakfast using this system, they will see the option to add these features on the page under **Additional reservation requests** section. They will be able to choose from the list of items, and then recalculate the cost in the **Rate Details** section of their reservation. *[See – Test the Reservation]*

---

### Additional reservation requests

---

Meal Plan\*  ▼

**Figure 23 – Additional reservation requests**

For additional information and support, please visit:

Online help: <http://www.webreserv.com/resources/na/help/admin/index.html>

Blog: <http://webreserv.wordpress.com>

Thank you for choosing WebReserv.com for all your online booking needs.