WebReserv Quickstart Guides

How to setup your
Boat Rental 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 your Boat Rental booking system using WebReserv. The set up process 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 business. It is recommended that you take the following steps when setting up your bookings:

- Create one rental type first.
- Enter rates for the rental.
- Create a couple of test reservations to become familiar with the reservation process and email notifications.
- Adjust settings
- Create remaining rentals.

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, locate the Get Started box, and click on "Create free account".
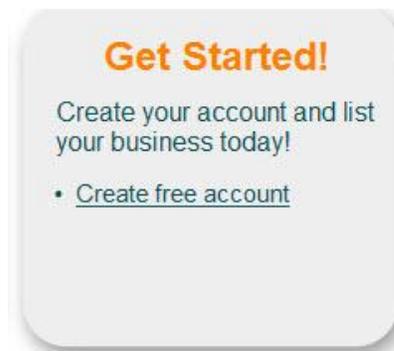
Figure 1 – Create account

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 **Recreation and Sports** as the category and **Boat Rentals** as the subcategory**.** Click **Continue**.

Figure 2 – Category Set up

Step 3: you will choose the type of booking for your rentals, i.e. daily, hourly, or schedules. If you rent boats by the hour, select "hourly", however, you also have the ability to set up your rentals by a schedule. This allows your customers to select between a number of pre-determined times. In this guide, we will discuss how to set up your rentals by the hour, but if you would like to learn how to set up a schedule, go to http://www.webreserv.com/resources/na/downloads/WebReserv.com-Configuring-Tour-Bookings.pdf to access the Configuring Tours user guide. This will give you detailed instructions on schedules.

Figure 3 – Type of booking

In addition to the type of bookings, **Step 3** allows you to choose your inventory type, i.e. number of units = boats, and if you charge a fee for your rentals or not.

Step 4: This step allows you to set up your boat inventory and rates for each boat rental. Enter the name of the boats 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 boats 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 product(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						
Product(s):	# Units:	**1 Hour** (Change) Rate per hour	**2+ hours** (Change) Rate per 2 hours	**4+ hours** (Change) Rate per 4 hours	**Additional Hours** (Change) Rate per 2 hours	**Daily** (Change) Rate per day
18' Fishing Boat	1	$	$ 150.00	$ 295.00	$	$ 400.00
20' Ski Boat	1	$	$ 175.00	$ 315.00	$	$ 475.00
21' Pontoon Boat	1	$	$ 200.00	$ 395.00	$	$ 575.00
16' Speed Boat	1	$	$ 95.00	$ 175.00	$	$ 250.00
	0	$	$	$	$	$

Rates listed above are: Per unit
Currency: USD - U.S. Dollar

[Back] [Continue] [Skip this step]

Figure 4 – Boat and Rate Set Up

The initial set up is now complete, great job! Next, we will look up setting up your boat rentals in more detail. Let's begin!

Creating your boat rental bookings

In WebReserv.com, creating bookings for your boat rentals consists of the following information:

- The products offered – name and description of the boats, pictures, reservation rules.
- Reservation type – describes how the boats can be booked.
- Rates or prices – describes what a boat rental 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 boats during initial set up, choose the first boat 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.

Products:					
Name:	Type:	No units:	Description:		
16' Speed Boat	Hourly	1		Edit	Delete
18' Fishing Boat	Hourly	1		Edit	Delete
20' Ski Boat	Hourly	1		Edit	Delete
21' Pontoon Boat	Hourly	1		Edit	Delete

Add Product   Back to setup menu

Figure 5 – Products (Boats)

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

Description (16' Speed Boat)

Enter name and description for this product.

Name*:   16' Speed Boat

Description: Enjoy the beautiful coastline crusing in the sleek, luxury boat. Seats 6.

Show in booking calendar: Yes

Save and continue   Back to setup menu

Figure 6 – Name and Description

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

Reservation Type (16' Speed Boat)

Select the reservation type.

○ **Daily Reservation**

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

	From:	To:
Example:	7/2/07	7/3/07

○ **Nightly Reservation**

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

	From:	To:
Example:	7/2/07	7/3/07

⦿ **Hourly**

Use this setting if reservations can be less than a whole day, i.e. hourly and half-day reservations.

	Date:	Time:		
Example:	11/1/07 ∨	10 ∨	00 ∨	AM ∨
			00	
			15	
			30	
			45	

Figure 7 - Reservation Type

The next page is the Reservations set up page. This is the where you will enter the hours that your rentals can be booked. The first task is to set the hours that your business is open, including days. You have to ability to set different hours on different days. Enter the Start and End times, and then only check the days that you are open for those hours. To uncheck a day, simply click once in the check box. Click **Add hours** to enter another opening time for another day.

In the example below, the customer will see that this boat is available to rent between the hours of 10:00 AM and 6:00 PM on Tuesdays-Saturdays and between 12:00 PM and 6:00 PM on Sundays and Mondays.

Custom Reservation Type (16' Speed Boat)

Opening hours   Enter the hours for which reservations can be made (i.e. opening hours).

Time:		Day(s):							
Start:	End:	Sun	Mon	Tue	Wed	Thu	Fri	Sat	
10:00 AM	6:00 PM	☐	☐	☑	☑	☑	☑	☑	Delete
12:00 PM	6:00 PM	☑	☑	☐	☐	☐	☐	☐	Delete

Add hours

The next part on this page is where you will enter the date and time settings on how a customer can schedule the rental. Let's discuss each setting now.

Date Settings: This is where you can select if a reservation has a start and end date or if there is a start date only, meaning the reservation will start and end on the same date.

Date Format: Here you can choose if you want customers to enter any date or select from a list of dates.

Start Time: Here you have to option to set it up where customers can enter a start time, choose from a list of times, or select an hour/minute/am or pm interval of times.

End Time: Set up the end time by allowing a customer to enter/select the end time, choose from a list of times, or the end time can be fixed so the customer will not have the option to choose.

Once you are satisfied with all the time rules, choose **Save and continue.**

Next, you will upload pictures of the boat. It is highly recommended that you upload pictures of your boats and include a description. This is will give your customers the opportunity to see the boats you have available to rent. Customers are more likely to rent from you if they can see a picture of your product.

Figure 9 - Pictures

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

The next section is reservation rules. Here you will indicate how many boats you have in your inventory for this product (i.e. 16' speed boat). Boats are based on the number of units. In this example, there is only one 16' speed boat (unit).

In addition, you will set the minimum and maximum number of persons for the rental. In this case, the boat only allows a maximum of 6 passengers. Make your selections and **click Save and continue**.

Reservation Rules (16' Speed Boat)

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 (default)
Number of units (or people)*:	1

Number of persons (per reservation)

If there is a minimum or maximum number of persons for a reservation, enter the number of persons in the fields below. If there is no requirement or need for number of persons, select **No**.

Use number of persons:	● Yes (Default) ○ No
Categories:	Persons
Minimum number of persons:	1
Maximum number of persons:	6

Figure 10 - Reservation Rules

The next page, Customer Information, shows you what information is requested from the customer at the time of booking. All options can remain as is, with the exception on Unit selection; this needs to be a **Required** field. This allows your customers to choose which boat they want to rent when making the reservation. Click **Save and continue**.

Customer Information (16' Speed Boat)

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

Customer name	○ Dont ask ○ Optional ● Required
Company name:	○ Dont ask ● Optional ○ Required
Address:	○ Dont ask ○ Optional ● Required
Phone number:	○ Dont ask ● Optional ○ Required
Email address:	○ Dont ask ○ Optional ● Required
Unit selection:	● Dont ask ○ Optional ○ Required
Agent:	● Dont ask ○ Optional
Comments:	○ Dont ask ● Optional
Office Notes:	● Dont ask ○ Optional

Figure 11 - Customer information

You are almost done! You have completed the set up and are now ready to test the reservation.

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:	1/19/12 8:01 PM
Agent:	jane@doe.com
Product:	16' Speed Boat

Date:	From:	To:	Persons:
1/19/12	10:00 AM	12:00 PM	1

Show Availability

Rate Details

Description		Linetotal (USD)
Rate		95.00
Subtotal	=	95.00
Total	=	95.00

Recalculate | Add charge | Add discount

Figure 11 – New Reservation

Congratulations! You have successfully set up your first boat rental reservation. 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 some of these features now.

Custom Fields

If you have other products or add-ons that you will make available to your customers for an additional charge, you will use the **Custom Fields** feature to add them to your set up. Items such as life vest or towels are possible products that you may have available to customers. The system allows you to add these custom features 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.

Figure 12 – 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 rent more than one of the particular add on, such as a life vest it is best to include a count of the items in the list. For example, if a customer rents a boat for 4 people, 2 adults and 2 children, they can choose the "2 Adult Life Vests" and "2 Child Life Vests" options from the drop down menu. See examples below. Once you have entered all the information, click **Save and continue.**

Edit custom field (Adult Life Vest)

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*:	Adult Life Vest
Selection label:	
	Optional: If provided, this label will be used instead of the name when this option is selected.
Rate label:	#name (#value)
	Optional: If provided, this label will be used instead of the name in rate details
Description	Safety is our top priority. Life vests are required for every passenger. Available for rent.
	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*:	No, thanks 1 Adult Life Vest [3.00] 2 Adult Life Vests [6.00] 3 Adult Life Vests [9.00] 4 Adult Life Vests [12.00]

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]*

Edit custom field (Child Life Vest)

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*:	Child Life Vest
Selection label:	
	Optional: If provided, this label will be used instead of the name when this option is selected.
Rate label:	#name (#value)
	Optional: If provided, this label will be used instead of the name in rate details
Description	Safety is our top priority. Life vests are required for all passengers. Available for rent.
	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*:	No, thanks 1 Child Life Vest [2.00] 2 Child Life Vests [4.00] 3 Child Life Vests [6.00] 4 Child Life Vests [8.00]

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 13– 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 **Optional**, then .**Save and .continue.**

Figure 14 – Add Custom Fields to Products

When a customer is booking a boat 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]*

Figure 15 – Additional reservation requests

Payment Options

As a business, an important step is deciding how and what forms of payment you will accept for the rental of the boats. The WebReserv system allows you choose how you will process payments for the bookings. Go to **Setup – Business Information – Payments.**

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: After 15 Minutes ▾

☐ **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 16 - 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.

☑ VISA   ☑ MasterCard   ☑ American Express   ☐ Diners Club   ☐   ☐ Maestro

Security Code (CVV)

Security Code: Required for customers and office (default) ▾

Figure 17 – Credit Card Processing

Automatic Email Notifications

Another function of the system is the ability to set up email notifications using Automatic Email Notification feature. 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.

Automatic Email Notifications (16' Speed Boat)

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:	Pending Reservation
Confirmed email:	Confirmed Reservation
Declined email:	None (no message/email)
Cancelled email:	None (no message/email)

The previst 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:	None (no message/email)
Post-visit email:	None (no message/email)

Figure 18 – Automatic Email Notifications

You're finished! Now you can start enjoying the ease of taking online reservations today!

For additional information and support, please visit:

Online help: http://www.webreserv.com/help
Blog: http://webreserv.wordpress.com