
WebReserv Quickstart Guides

How to setup your Bike 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 a bike rental booking system with 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 business. It is recommended that you take the following steps when setting up your bike rentals:

- Create one type of bicycle (or tour)
- Enter rates for the bicycle (or tour)
- Create a couple of test reservations to become familiar with the reservation process and email notifications
- Adjust settings
- Create remaining bicycles

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

<http://www.webreserv.com/bike-rental-system.do>

Locate the Get Started box, and click on "Create free account".

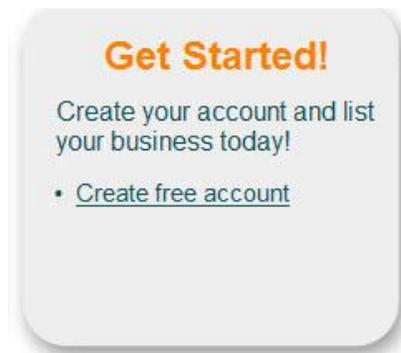


Figure 1 – Create account

The system will take you through an initial set up process to enter your business information. Step 1 is basic information about your business including name, address, web site address, and email address. Step 2 allows you to choose the category and subcategory for your business. To set up your bike rental business, the Category is **Recreation and Sports** and the Subcategory is **Bike Rentals**.

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

In Step 3, you will choose the type of booking for your rentals, i.e. daily, hourly, or schedules. If you rent bikes by the hour, select “hourly”,

WebReserv Setup - Step 3 of 5

Please select the reservation type.

Please make any changes necessary and click **continue** to continue.

Type of booking

How would you best describe the type of booking?

- Daily**. Customers reserve your products or services one or more days at a time. *Example: A hotel room.*
- Hourly**. Customers reserve your products or services one or more hours at a time. *Example: A car reservation.*
- Schedules**. Customers reserve your products or services by schedule. *Example: A daily tour bus.*

Figure 3 – Type of booking

Note: 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 pre-defined dates and times (called schedules), go to <http://www.webreserv.com/download/how-to-set-up-your-tour-booking-system.pdf> to access the Tours user guide. This will give you detailed instructions on schedules.

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

Step 4 gives you the opportunity to enter the rates for your rentals. It is recommended you skip this step as you will be able to get more detailed with products and rates as you continue with setting up your system. We will discuss this now.

Setting up your bike rentals

In WebReserv.com, creating your bike rental bookings consists of the following information:

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

To create a rental, log on to your WebReserv.com account and select **Setup – Products & Reservation Rules** and select **Add product**. On the description page, enter a name and a description of the type of bike and click **save and continue**.

Description (New)

Enter name and description for this product.

Name*:

Description:

Show in booking calendar:

Figure 4 – Name and Description

On the reservation type page, you have a few options depending on how you reserve the bikes. Most likely you will rent daily or by the hour. Select the choice that works best for your business and then click **save and continue**.

Hourly

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

Date: Time:

Example:

Figure 5 - 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 bike is available to rent between the hours of 10:00 AM and 5:00 PM on Tuesdays-Saturdays and between 12:00 PM and 5:00 PM on Sundays and Mondays.

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	5:00 PM	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Delete
12:00 PM	5:00 PM	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Delete

Add hours

Figure 6 – Opening 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.

The **Date Settings** 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.

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

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

Next you will choose how to set up the **End Time** of the reservation. The options include: a customer can enter/select the end time, choose from a list of times, or the end time is fixed so the customer will not have the option to choose.

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

Date Settings	Reservation has start date only (start and end date is always the same) ▼
Date Format	Customer can enter any date ▼
Start time	Customer must select time from list of times ▼
	Enter the start time(s) separated by a comma. 10:00 AM, 11:00 AM, 12:00 PM, 1:00 PM, 2:00 PM, 3:00 PM
End time	Customer must select length from list ▼
	Enter one or more length options e.g. Short Rental 1 Hour [0d1h0m] Long Rental 2.5 Hours [0d2h30m] 2 Hours [0d2h0m] 4 Hours [0d4h0m] 6 Hours [0d6h0m]

Figure 7 - Time and Date Rules

Note: For Daily reservation type, you will not have to choose these time and date options.

On the next page you can upload one or more pictures of the bikes that are available to rent. It is highly recommended that you upload pictures of your bikes. This will give your customers the opportunity to see the bikes you have available to rent. Customers are more likely to rent from you if they can see a picture of your product.

Pictures (Mountain Bike Extreme)

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 8 - Tour pictures

When you have added the pictures of the bikes, click **save and continue**.

The next screen includes all the reservation rules. The most important rule is the availability/inventory calculation. In most cases, a bike rental is dependent on the number of units, so select number of units and enter the maximum number of bikes you have available for that particular product (i.e. Mountain Bike Extreme) and click **save and continue**.

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 9 - Number of units

The next page will give you the opportunity to name the bikes (units) to rent. You can include size information, maker of bike, or other pertinent information that will help the customer decide which bike to rent. Click **Save and continue** when you have entered all the details about your bikes.

Unit Details (Mountain Bike Extreme)

Under reservation rules, you specified that you have 5 products available. On this page you can associate each unit with a name, such as a room number, licenseplate, serial number or similar.

If you dont need to name each unit, simply click save and continue.

To change the display order, simply drag the row to the correct position. Click **save** to save your changes.

Number:	Name:
1	SM Specialized Safire Comp
2	MD Giant Trance X3
3	LG C-Dale Rize 4
4	LG Giant Trance X3
5	XL Specialized Camber Comp

Figure 10– Unit Details

On the next page, you can specify what information the booking system needs to get from a customer when a booking is made. Make sure that you select Unit selection as a **Required** field.

Customer Information (Mountain Bike Extreme)

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
Number of units:	<input checked="" type="radio"/> Dont ask <input type="radio"/> Optional <input type="radio"/> Required
Unit selection:	<input type="radio"/> Dont ask <input type="radio"/> Optional <input checked="" 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 11 - Customer information

Entering rates

You are now almost done with the setup. In the top menu, click the Rates menu option, and select **standard rates**. Here you will enter the hourly rates for the Mountain Bike Extreme product. Click **save and continue** to save your rates.

Edit Rates (Standard Rates)

Enter the rate details for this rate list.

Name*:

Description*:

Valid From*: 

Valid To*: 

Product:	Rate is:	Category:	1 Hour	2 Hours	4 Hours	6 Hours	Daily	Weekly
			Rate per hour	Rate per 2 hours	Rate per 4 hours	Rate per 6 hours	Rate per day	Rate per week
Mountain Bike Extreme	Per reservation <input type="text" value=""/>		<input type="text" value=""/>	20.00	40.00	60.00	75.00	300.00

Note: If you are using **per person** rates, the rate in each column is the total rate for all the persons in that column.

Figure 12 – Rates

Test the Reservation

You are now ready to test the reservation. Click **Frontdesk** in the main menu and then select **New reservation**. You can enter number of bikes (units) and length of rental and click **recalculate** to see the total amount.

Reservation (New)

Reservation Details

Status:	New		
Reserved:	9/29/11 10:44 PM		
Agent:	jane@doe.com		
Product:	Mountain Bike Extreme ▼		
Unit*:	Date:	Time:	Length:
SM Specialized Safire Comp ▼	9/29/11	12:00 PM ▼	4 Hours ▼
<input type="button" value="Show Availability"/>			

Rate Details

Description		Linetotal (USD)
Rate		40.00
Subtotal	=	40.00
Total	=	40.00

<input type="button" value="Recalculate"/>	<input type="button" value="Add charge"/>	<input type="button" value="Add discount"/>
--	---	---

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

Figure 13 – New reservation

Congratulations! You have successfully set up your first bike 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

Most likely, you will also have helmets, lunch baskets, or child seat add-ons that you will make available for rent to you customers. 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:

Figure 14 – 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 helmet, it is best to include a count of the items in the list. For

example, if a customer rents 4 bikes, but only needs 2 helmets, they can choose the “2 Helmets” option from the drop down menu. See example below. Once you have entered all the information, click **Save and continue**.

Edit custom field (Bike Helmet)

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*:

- None
- 1 Helmet [8.00]
- 2 Helmets [16.00]
- 3 Helmets [24.00]
- 4 Helmets [32.00]
- 5 Helmets [40.00]
- 6 Helmets [46.00]

Figure 15 – 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.

Customer Information (Mountain Bike Extreme)

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

Number of units: Dont ask Optional Required

Unit selection: Dont ask Optional Required

Agent: Dont ask Optional

Comments: Dont ask Optional

Office Notes: Dont ask Optional

Custom Fields

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

Bike Helmet: Dont ask Optional Required

Lunch Baskets: Dont ask Optional Required

Figure 16 – Add Custom Fields to Products

When a customer is booking their bike 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

Bike Helmet*

Lunch Baskets*

Figure 17 – Additional reservation requests

Automatic Email Notification

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 you can click here, <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 (Mountain Bike Extreme)

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)"/>

Figure 18 – Automatic Email Notifications

FAQ: Products vs. Units

The system uses the words 'product' and 'unit' in the set up process, can you please explain how each relates to bike rentals?

A **product** in WebReserv is one or more item that has the same characteristics and price. For example, when you book a hotel room, you choose a room with a King, Queen, or 2 Double beds, those room options would be the product. Furthermore, the actual rooms, such as Room 207, are the **units**. In most cases, customers want to select the product, but are not as concerned with the unit they get. For this reason, the booking system will, by default, not allow the customer select the actual unit.

Bike rentals are a bit different than a hotel booking as it is usually necessary for the customer to pick the bike size that best fits them. Creating each bike as a different product would make the product list very long and difficult to navigate for customers and front desk personnel. A better option is to use the unit fields to contain the sizing information and let the customer select the specific unit.

For additional information and support, please visit:

Online help: <http://www.webreserv.com/help>

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