EWebRenter Email System

DEALERSHIP SOFTWARE

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INTRODUCTION

This document is intended to guide the EWR Administrator and Users through the configuration, modification and use of the various Email subsystems available. In particular:

- Configuring Your Email Server
- Managing Documents & Groups
- Managing Email Templates
- Email Generation Via Rental Form
- Generic Email Forms
    - For Customers/Employees
    - For Owners

NOTE: This document contains links to online documents which may not be visible if the document is printed. Also, this document may be updated without notice – so it is nest to use this document online when possible.

CONFIGURING YOUR EMAIL SERVER

The first step is to configure EWR to use your own (ISP's) email service, such as Gmail. Each company must configure eWebRenter to use an email server of their choice, as well as designate a "reply-to" address. This configuration is done once for each location, on the Location Information form, under the *Email Settings* tab (see image below). You can use the same or different information for each location.

You can continue (and it is recommended) to send email to customers via eWebRenter; sent emails will be logged so you may review them at any time. You may also include multiple attachments in the email. However, when a customer replies to an email, the reply will now be sent to the email address you designate in the "Default Reply-To Address" field, for example "rental-agent@your_company.com". You may want to ensure that email sent to this default email address is accessible to **all** agents so that they have access to all responses.

Select ***Admin -> Locations/Contracts -> Find Location/Contracts (Select) -> Email*** Settings tab:

Default Reply-To Address: A required email address of format *username@email_domain*. For example, *RentalAgent1@Gmail.com*

Port: The Port is required and must use SSL/TLS (typically 465 or 587).

Outgoing SMTP Server: The server is required and usually begins with "smtp.", e.g. *smtp.my_email_server.com*

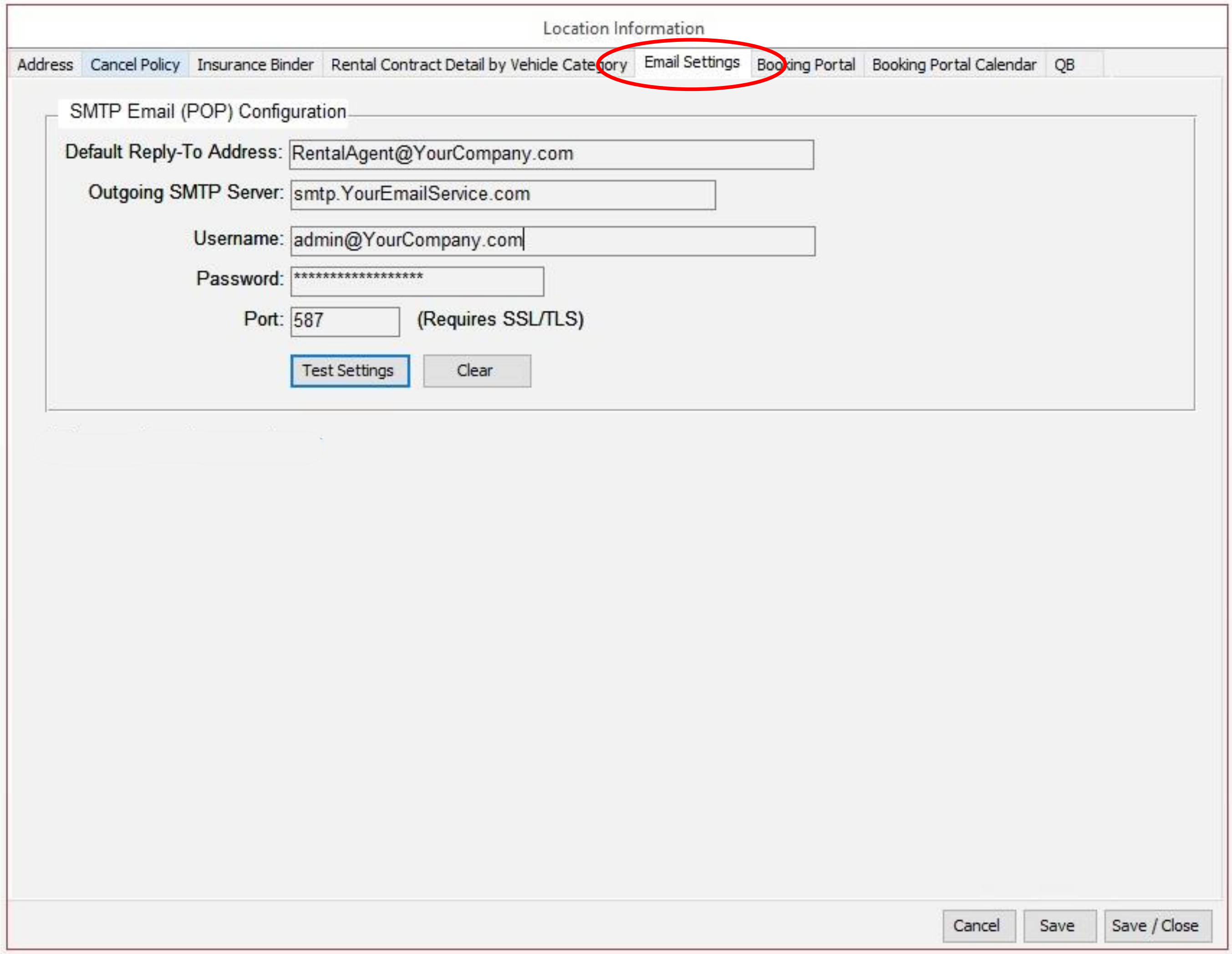
Username: The Username is required and is the username you use for your email login

Password: The Password is required and is typically the password you use for your email login. However, some ISPs (such as Google and Yahoo) no longer support using you email password directly. For example, to use a Gmail account with 3rd-party apps such as eWebRenter, you must:

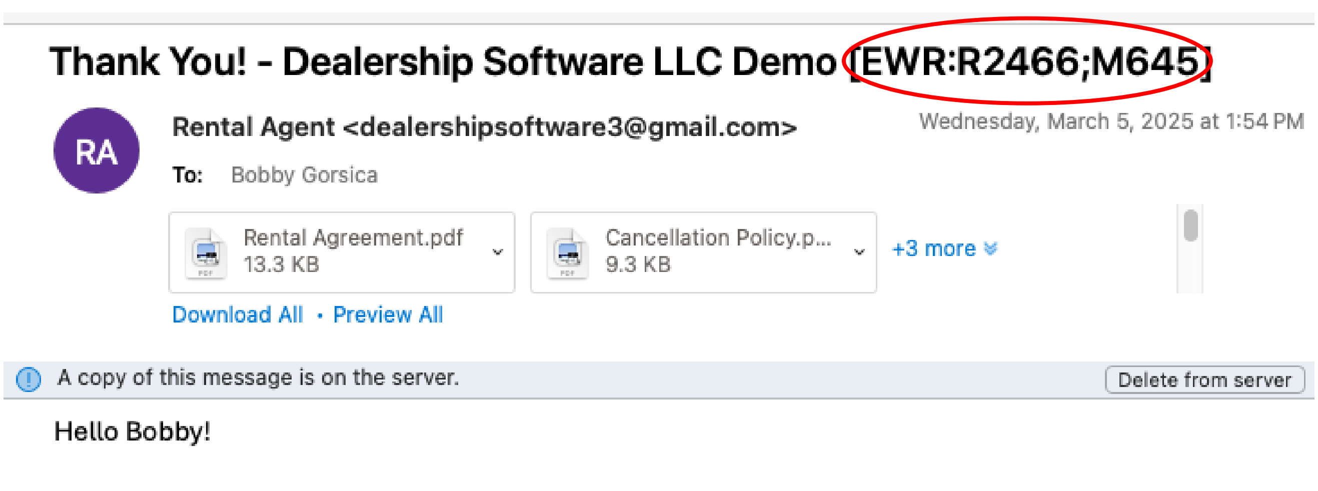
- Turn On 2-Step Verification
- Create an App Password. You then use this "App Password" as the password in the EWR Email settings.
- Use port 587 for Gmail

If you are not sure which email settings to use, contact your IT department or ISP.

Once you have entered your settings, click "Test Settings". If the settings are correct, you will receive an email at the "Default Reply-To Address"; otherwise, an error will be displayed along with some level of hopefully helpful information.



Note: When sending an email to a customer via the Rental Form, if the email is associated with a Reservation ID – which is typical – the Subject line of the email will contain in brackets the Reservation ID [EWR:R**2466**;M645] and Company ID: [EWR:R2466;M**645**]. When a customer replies to the email, you can use the Reservation ID to associate the email with the appropriate reservation.

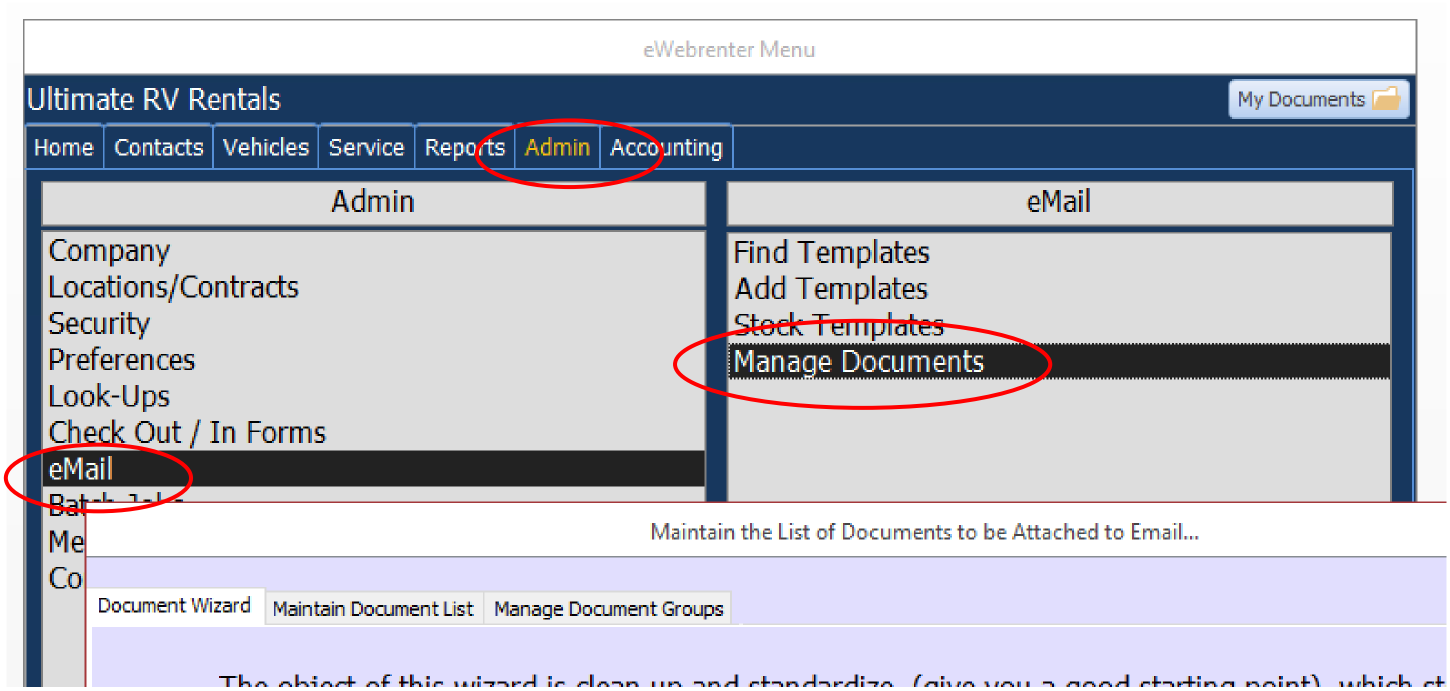


MANAGING DOCUMENTS & GROUPS

From the Rental Form, you can send email to the customer based on one of several templates, along with appropriate attachments (typically contracts) and optional links. The templates and attachments are typically based on the "type" of email, e.g., a Quotation, Rental Contract, Actual Charges, etc. EWR provides several default types, contracts and email templates.

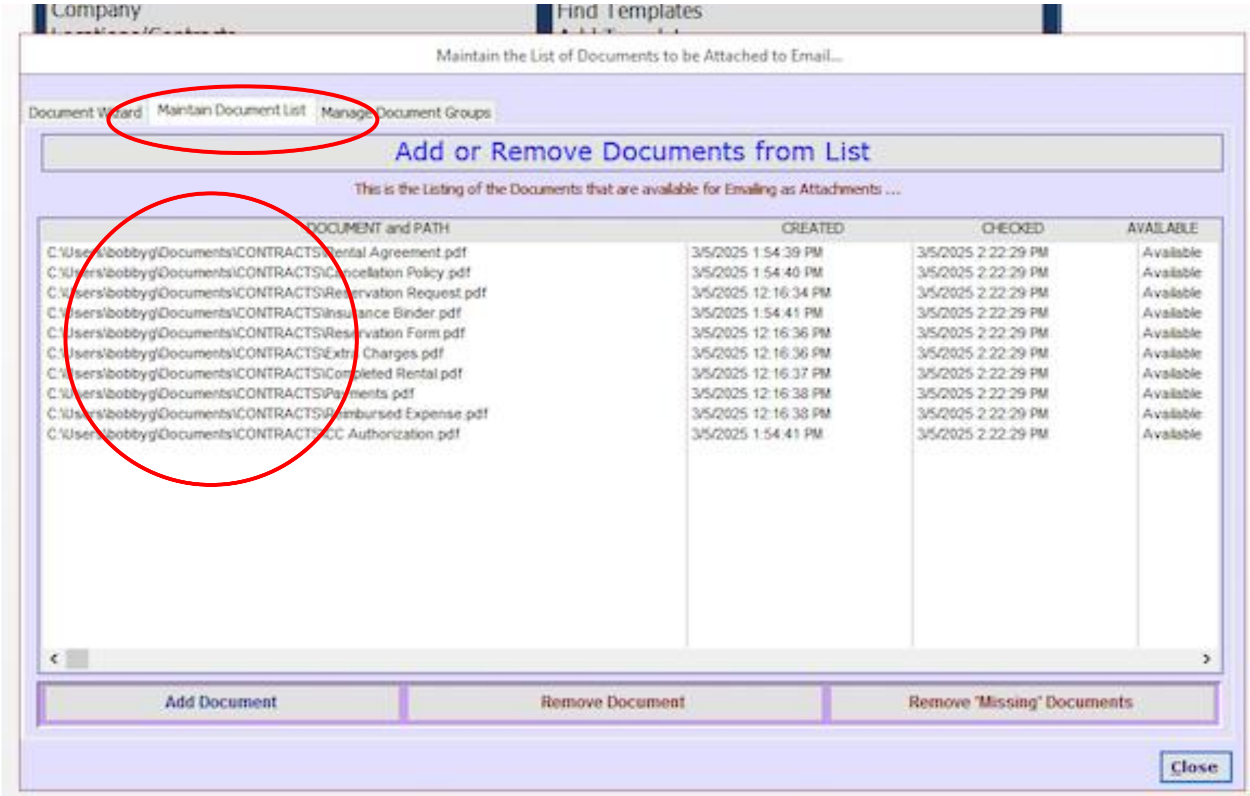
Running the Document Wizard

To manage the documents and templates, you **first need to run the Document Wizard**. To do so, select ***Admin -> eMail -> Manage Documents***:



Note: If as a User you do not have the above path available, you likely don't have permission for it. Your administrator will need to temporarily give you Admin access from the ***Admin -> Security -> Manager***.

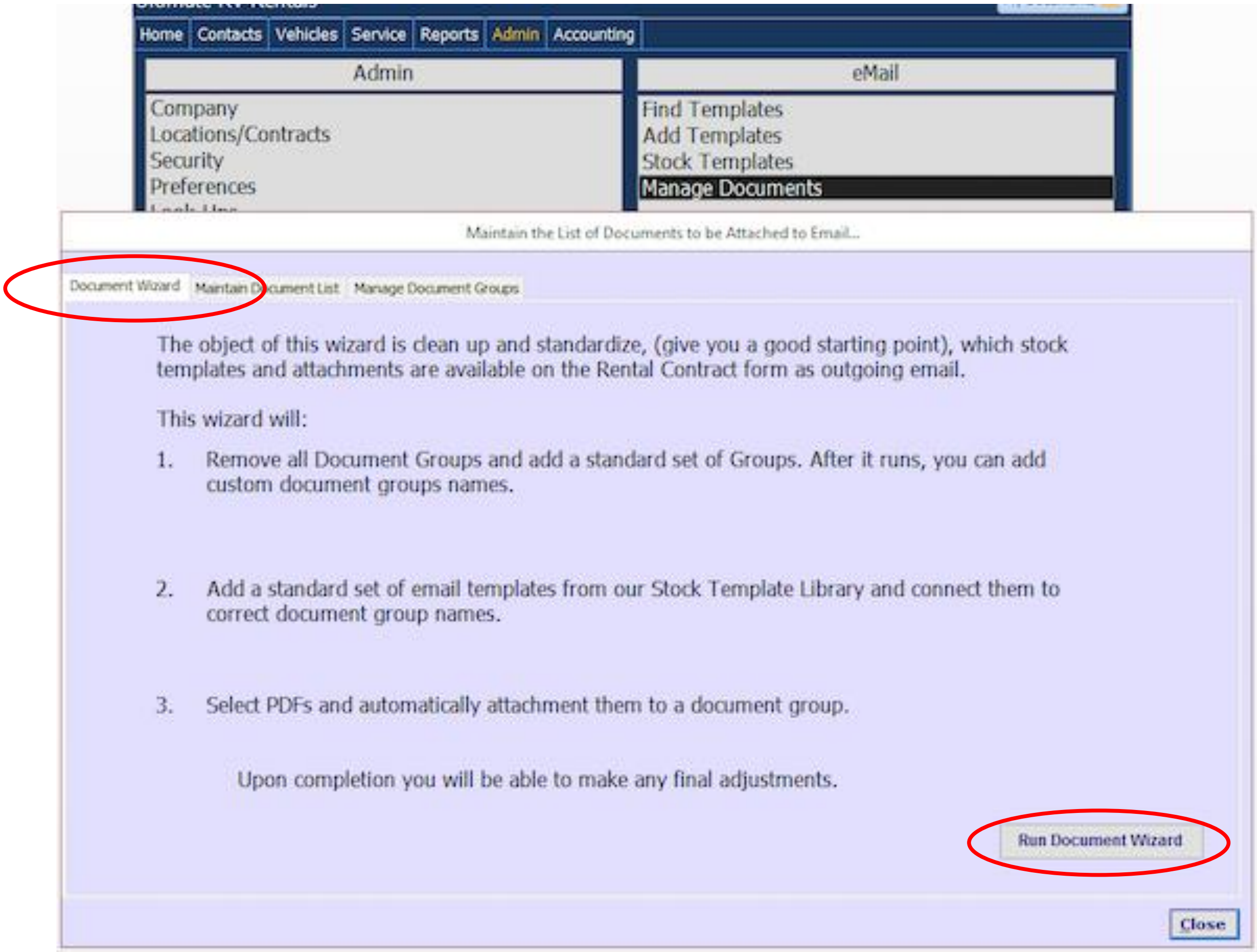
First, select the “Maintain Document List” tab, and look at the document PATHS:



Ensure that the PATHS are set to the EWR User’s Documents directory. That is, it should look similar to C:\Users\(***your EWR user name***)\Documents...

If the Path is using a different User’s Documents directory, then the Document Wizard may not have been run.

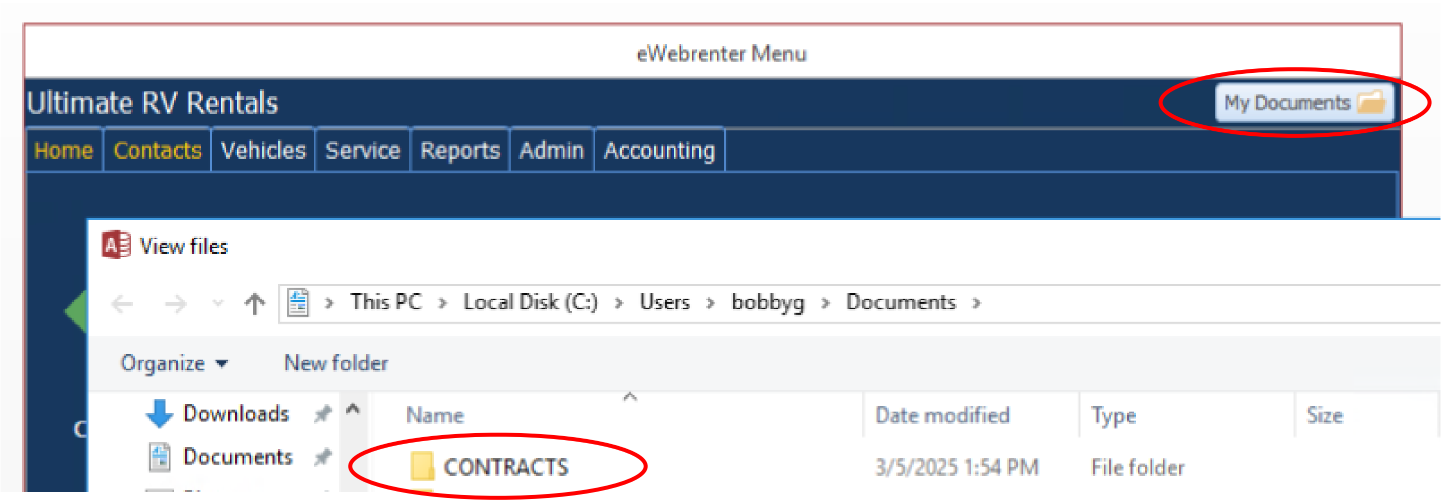
If the Document Wizard has never been run or if you want to reset to the default documents), then under the Document Wizard tab, click the Run Document Wizard button to reset your Documents and Paths:



Running the Document Wizard creates a CONTRACTS folder in the User’s Documents folder, and within the CONTRACTS folder, PDFs for all default contract types.

A Word About Document Storage

On the main EWR menu, in the upper right corner is a button for "My Documents". Clicking this button will open the folder viewer for your user's Documents folder. By convention, all documents to be used by EWR are kept in the CONTRACTS folder.



By default, EWR provides many documents which you manage as mentioned elsewhere in this guide. However, you can add your own custom documents as well. For example, if you have a PDF on your local PC, to copy that PDF into the CONTRACTS folder in your user's CONTRACTS folder, you would:

- If you're running EWR in full-screen mode on your local PC, minimize it.
- Find the PDF on your local PC and copy it onto your clipboard.
- Maximize EWR and click the "My Documents" button.
- Navigate to the CONTRACTS folder.
- Paste the document into the folder.

You can delete your custom document in a similar fashion. Simply click the "Mu Documents" button on EWR, find your document, hover over it, right click, and select "Delete".

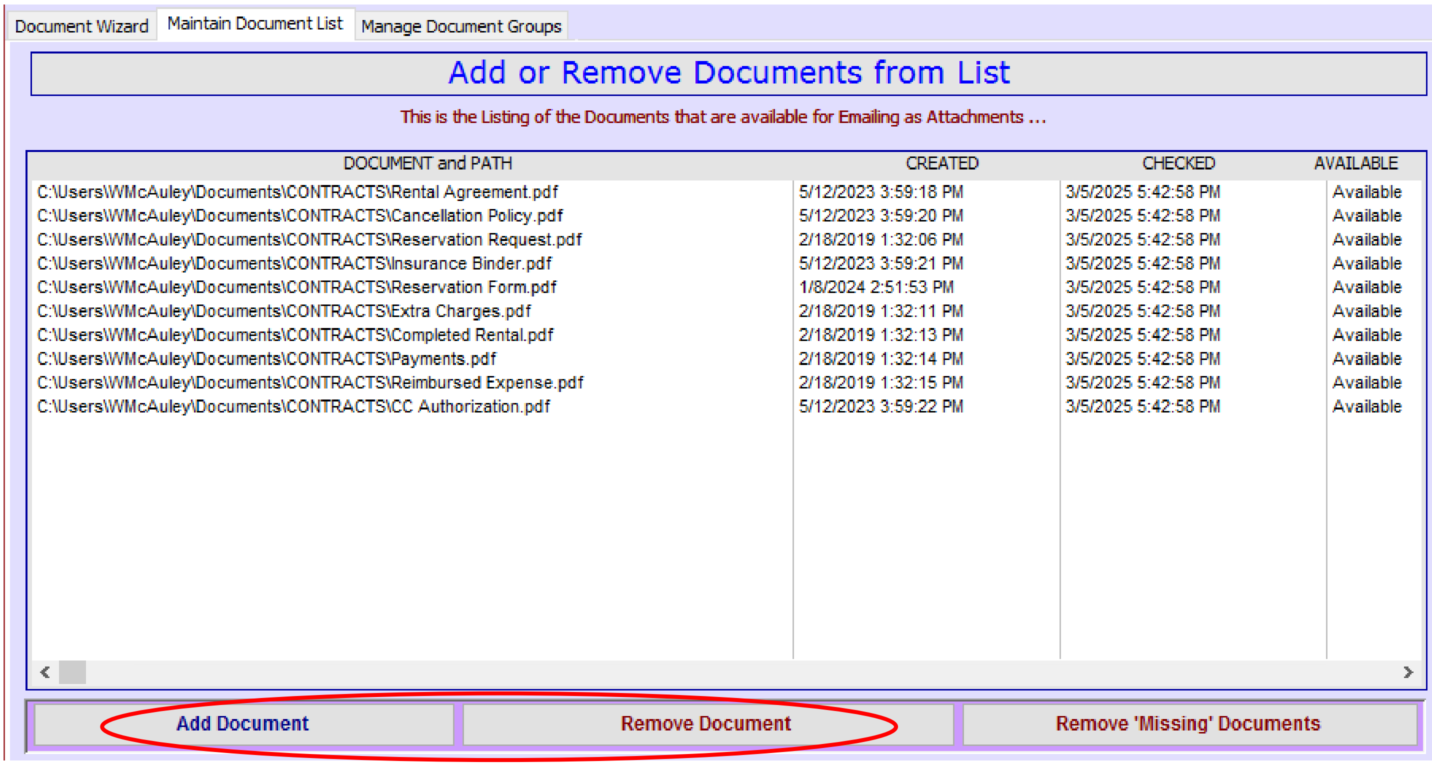
NOTE: It is recommended that you do NOT delete any non-custom documents.

NOTE: If your custom document is in the Attachment List (see next section), then remove it from the Attachment List before removing it from the CONTRACTS folder.

Adding a document to the CONTRACTS folder does NOT automatically make it available within EWR. To let EWR know about the document, follow the steps in the next section.

Adding/Removing Documents To/From The Attachment List

Back under the Maintain Document List tab, you can see a list of the pre-installed – and perhaps custom - documents, primarily PDFs. These are the Attachments you can add to emails you send to Customers via the Rental Form. Note that although you can Add custom documents here, it is highly recommended that you do NOT REMOVE any of the default PDFs.



The pre-installed PDFs are generated by EWR dynamically. They are composed of a static layout and boilerplate along with some custom verbiage as is described in the Document Customization section.

Suppose you have a custom document you want to add to the Attachment List so that it is available in EWR to attach to emails you send to customers. First, ensure the document is in the user's Documents\CONTRACTS folder as per the section "A Word About Document Storage". Then click the "Add Document" button, find and select the desired document, and click "Open". It should now appear in the list. At this point, it should now be available as an attachment for email.

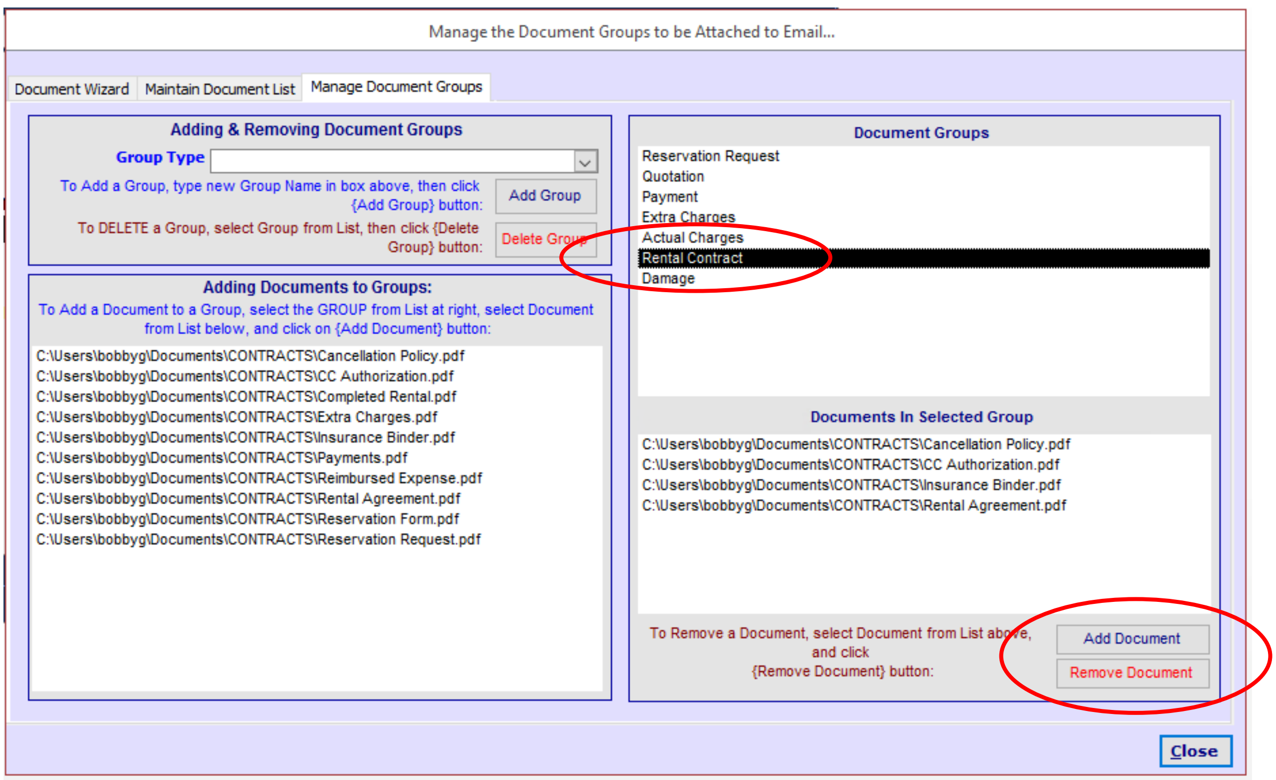
You can also add your custom document to a "group" of documents, as described in the section "Document Groups" below.

Document Groups

You can create Groups of Documents. For example, if you typically attach several documents every time you email a customer their Rental Contract, you can create a “Rental Contract” group, and along with the Rental Contract document, you can select the other documents (e.g., Insurance Binder, Cancellation Policy, etc.). Then, on the Rental Form, when you generate an email, you can select this one group, and all the associated documents will be attached to the email.

To do so:

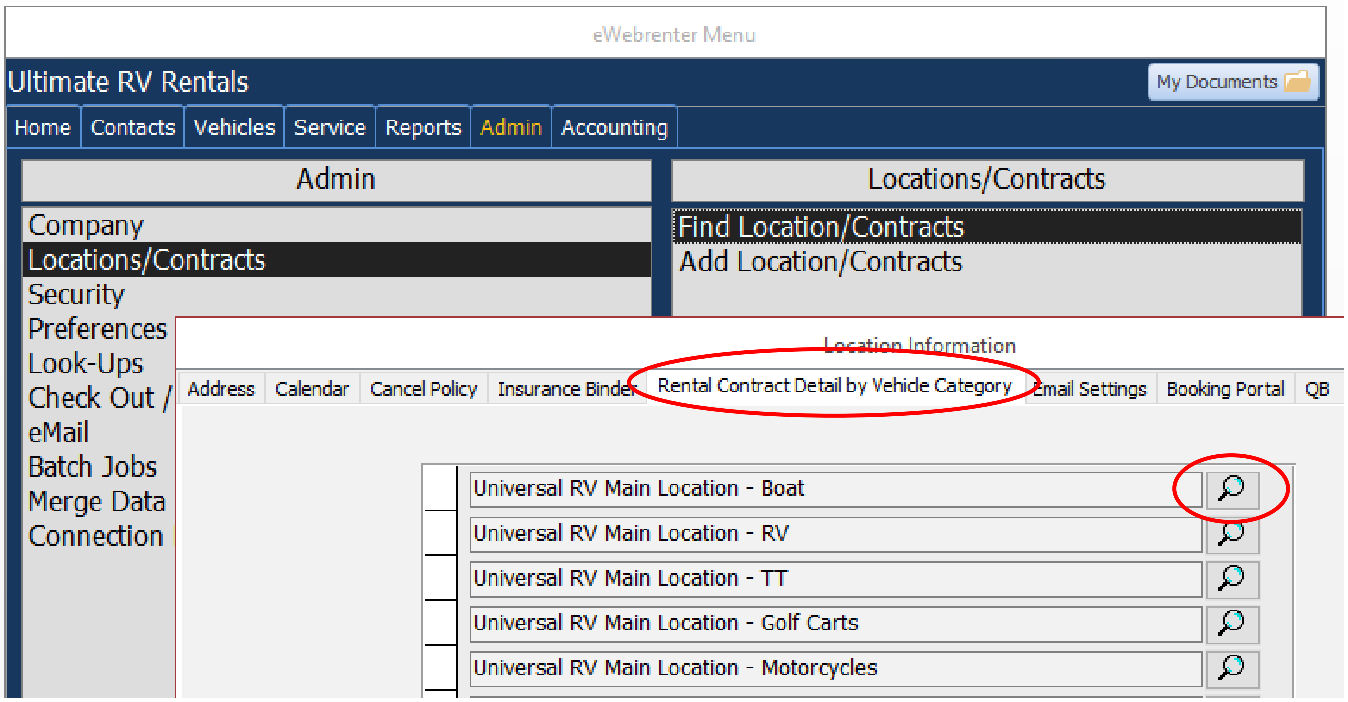
- Select the “Manage Document Groups” tab.
- Select the Document Group to which to add the document
- Any documents already in the group will be displayed. Follow the instructions on the form to Add/Remove documents as desired.



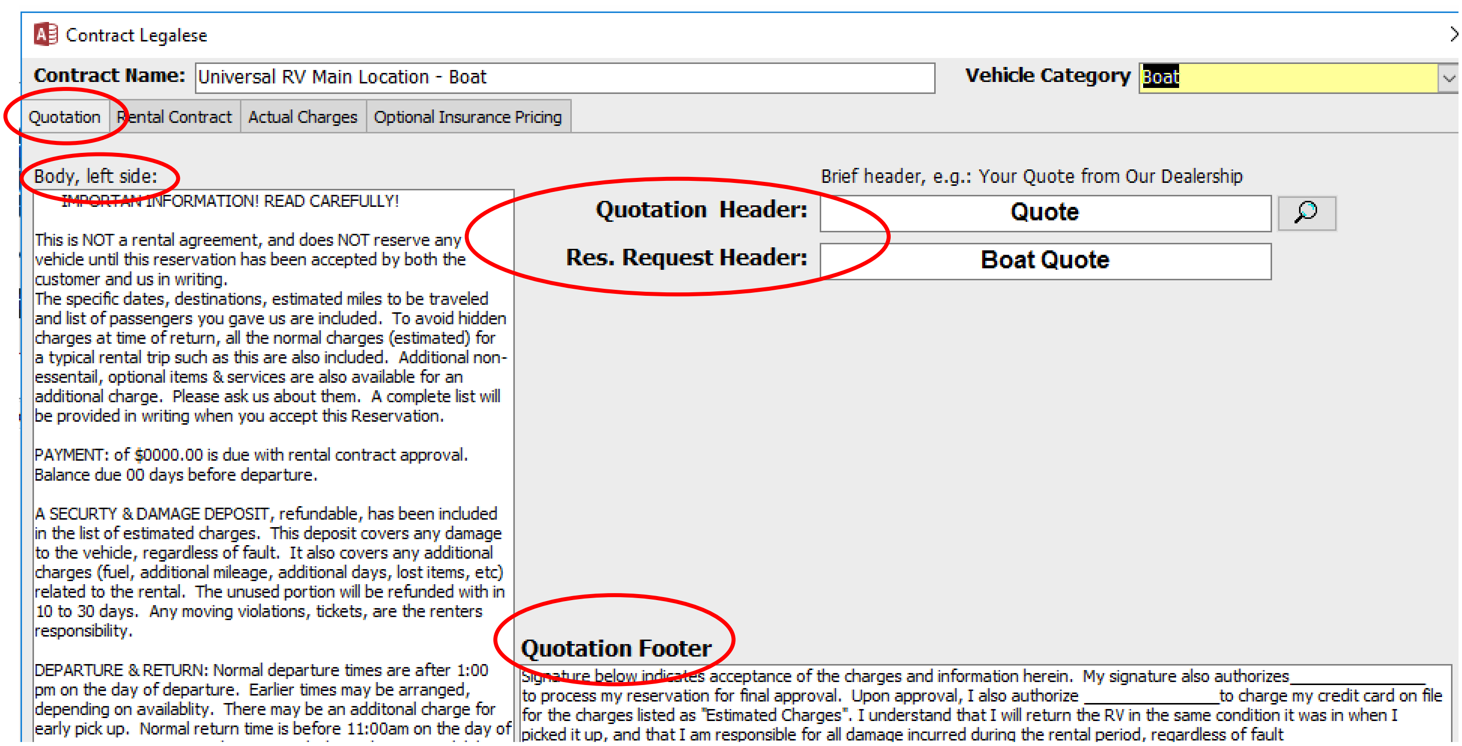
Once you have your Documents and Groups configured, they will appear as selectable when you generate an email from the Rental Form.

Document Customization

You can customize certain sections of text for the Quotation, Rental Contract, and Actual Charges document templates via ***Admin -> Locations/Contracts -> Find Location/Contracts (Select) -> Rental Contract Detail by Vehicle Category***:



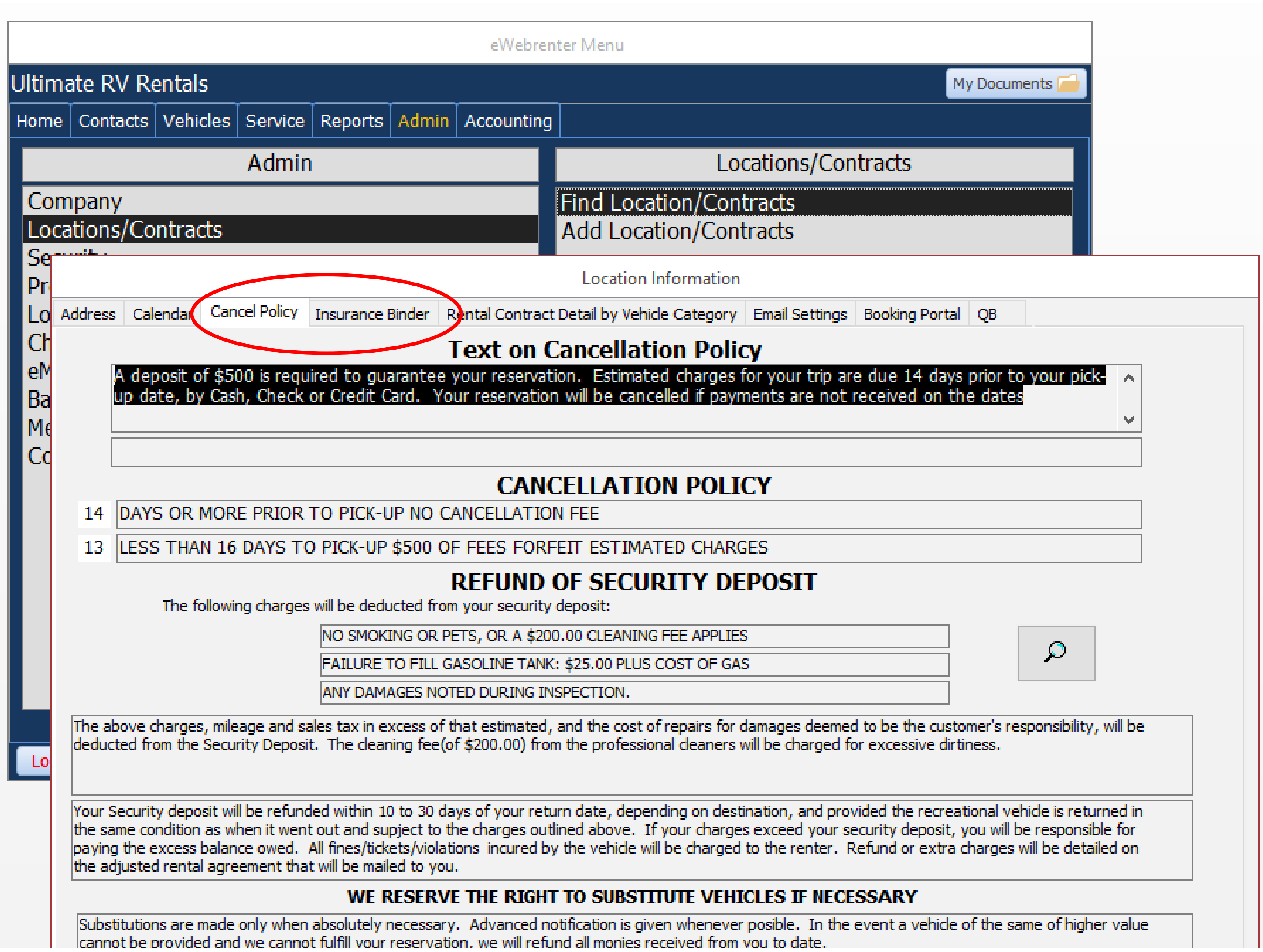
Selecting a Vehicle Category by clicking the magnifying glass will open the Contract Legalese form:



For example, for a Quotation, you can modify the text for the Headers, Body and Footer.

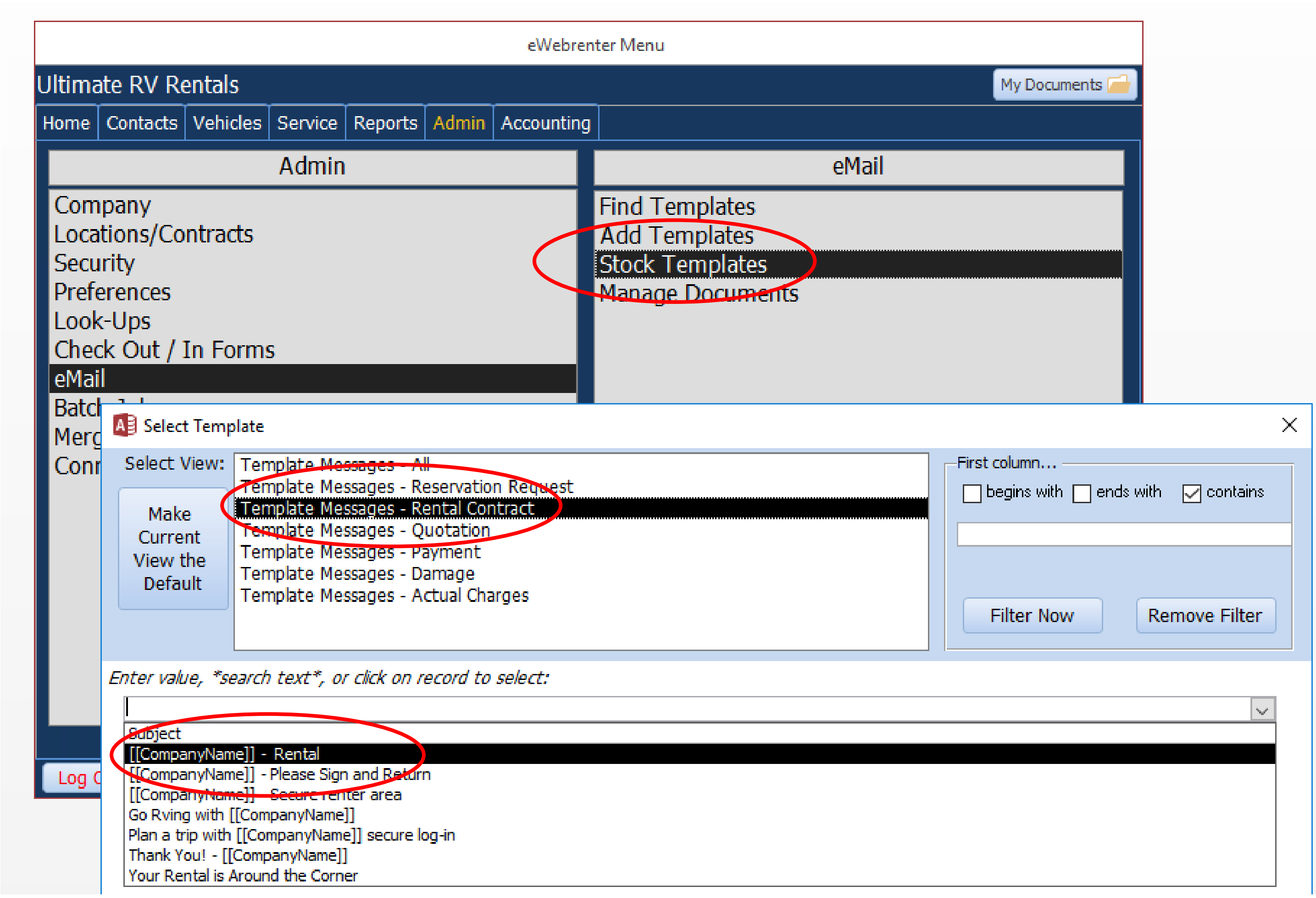
Other Document Customization

You can customize verbiage for the Cancellation Policy and Insurance Binder as well, using the "**Cancel Policy**" and "**Insurance Binder**" tabs on the Location Information page (***Admin -> Locations/Contracts -> Find Location/Contracts (Select)***). For example:

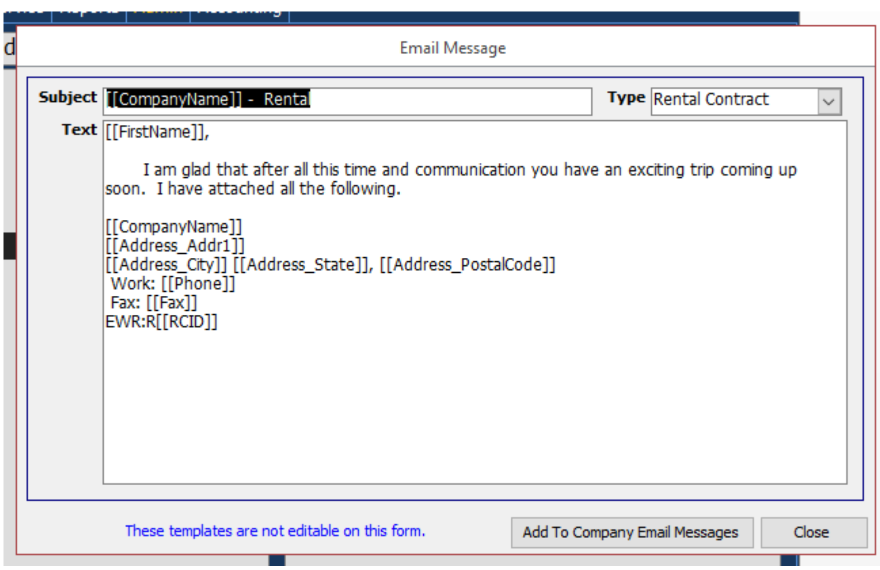


MANAGING EMAIL TEMPLATES

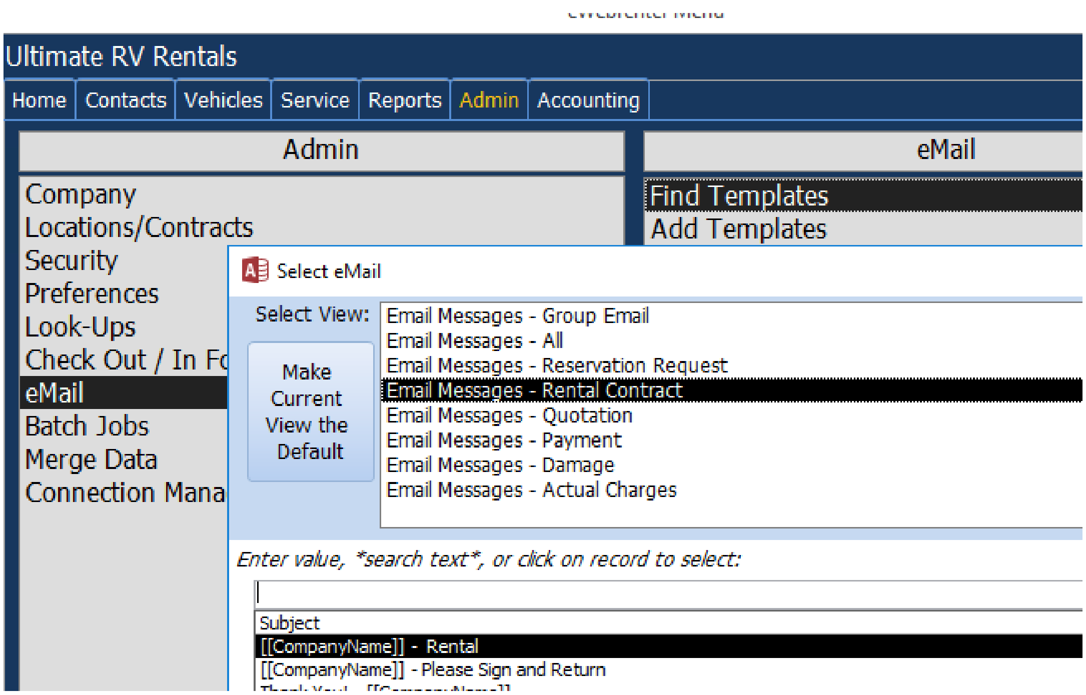
Once the documents are customized to your liking, the next thing to do is to customize the verbiage in for the emails used which will contain the attached documents. EWR provides a number of "stock" email templates page (***Admin -> eMail -> Stock Templates***):



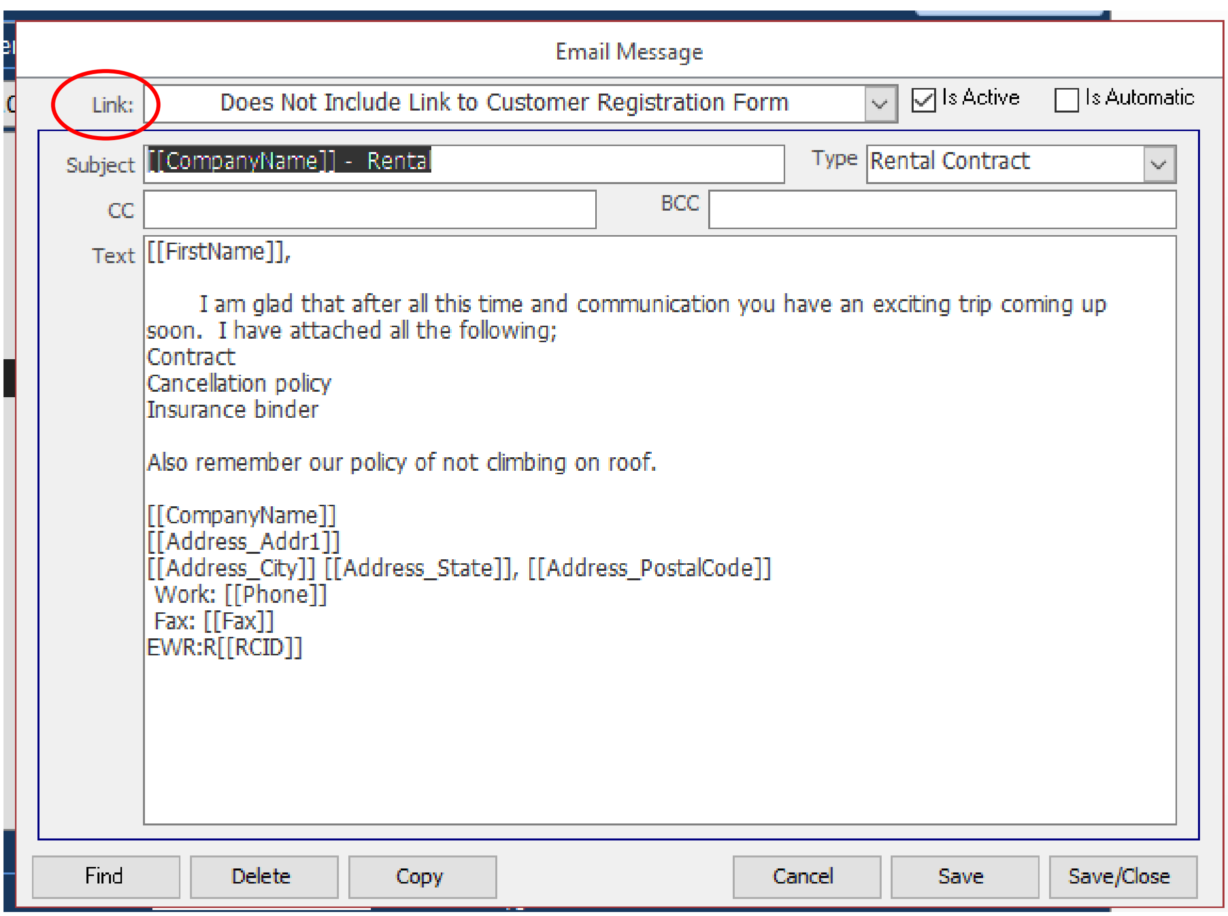
The Templates are categorized by "Reservation Request", "Rental Contract" etc. For example, selecting the "Rental Contract" category will display several templates specified by their Subject line. For example, selecting the Subject **"[[CompanyName]] – Rental**" displays:



Note that on the Stock Template form, the templates are NOT editable. To edit a template, first Find it. For example, ***Admin -> eMail -> Find Templates*** will display a similar picklist:



And by selecting the Subject **"[[CompanyName]] – Rental"** you get an editable form:



A few things to note:

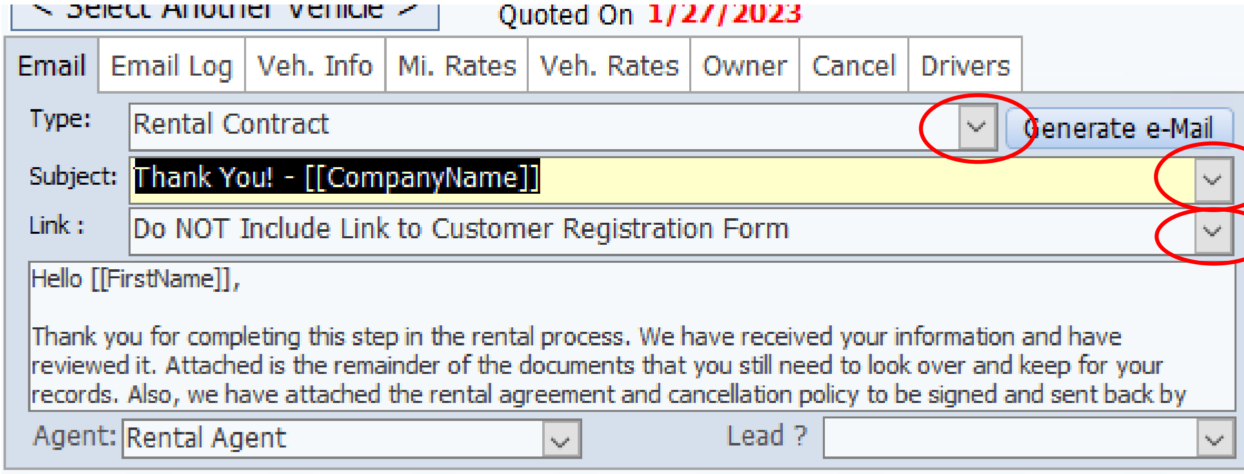
- These forms **are shared among all Users** – if you want a uhique form for a user, you will need to create a new template (***Admin -> eMail ->* Add Template**) and give it a unique subject line. It will still be shared among all Users, but will be known by the Subject line.
- **Link:** Determines whether or not to include the link by default for this email template. This is a link to the Customer Portal – see the Customer Portal section below for more information.
- **Is Active:** Whether or not the template appears in the Rental Form email list
- **Is Automatic:** Whether or not it is automatically selected in the Rental Form email list
- **Subject:** The unique identifier for this email template
- **Type:** The email category
- **Terms inside brackets:** These are dynamic placeholders for text that will be converted when the email is generated in the Rental Form. For example, "[[FirstName]]" will be replaced by the Customer's First Name, [[CompanyName]] will be replaced with your Company Name, and [[RCID]] will be replaced with the Rental Contract ID. Here are some other options:
    - **[[LastName]]:** Customer last name
    - **[[Address_Addr1]]:** Company Street Address
    - **[[Address_City]]:** Company City
    - **[[Address_State]]:** Company State
    - **[[Address_Postal Code]]:** Company Postal Code
    - **[[Phone]]:** Company Work Phone
    - **[[Fax]]:** Company Fax
    - **[[CompanyWebSite]]":** Company Website

    And some less common ones:

    - **[[BookDate]]:** Date Booked
    - **[[QuoteDate]]:** Date Quoted
    - **[[EmployeeID]]:** Employee ID (not name!)
    - **[[VehicleName]]:** Vehicle ID
    - **[[ModelName]]:** Vehicle Model
    - **[[CustomerID]]:** Customer ID
    - **[[DestinDesc]]:** Destination description
    - **[[EstMiles]]:** Estimated Miles
    - **[[CkOutTime]]:** Check Out Time
    - **[[CkInTime]]:** Check In Time

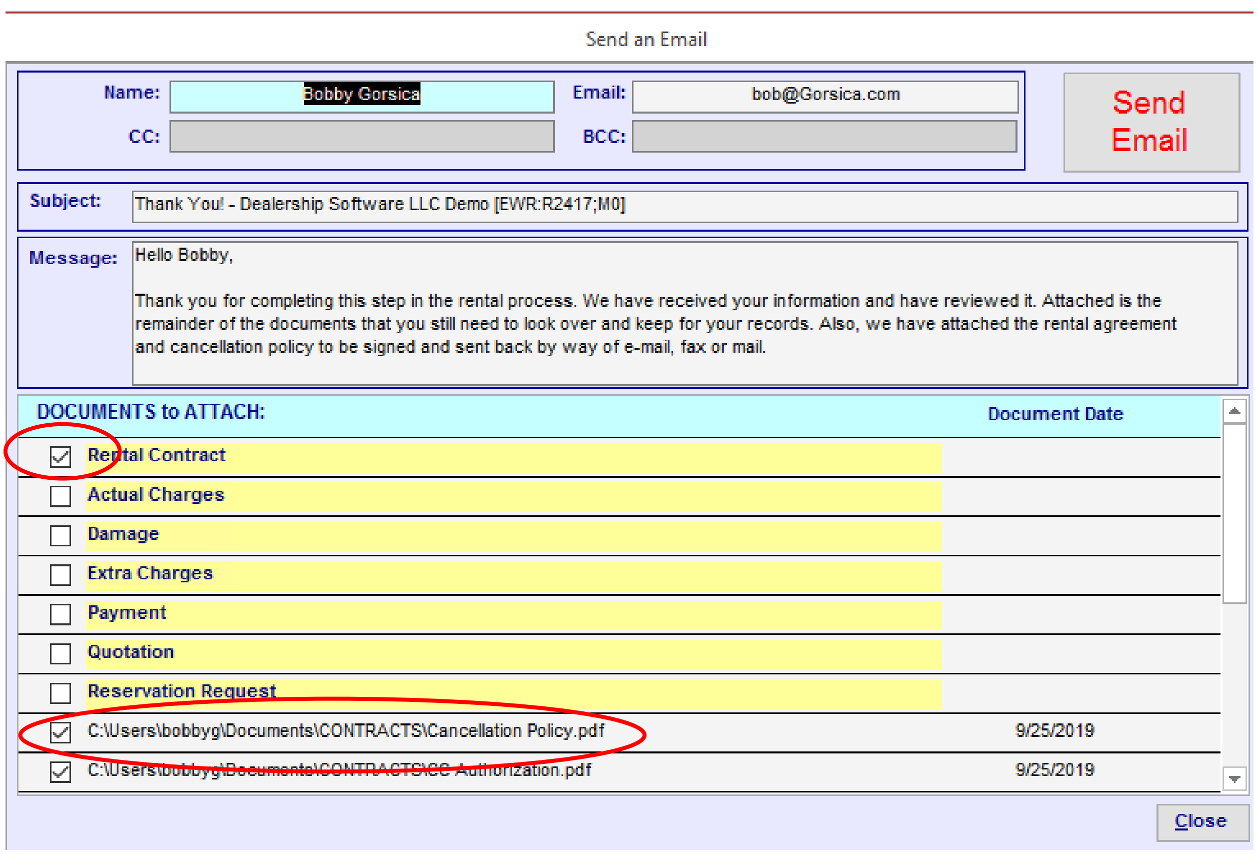
EMAIL GENERATION VIA RENTAL FORM

On the Rental Form, an agent generates an email from one of several template Types and Subjects (if multiple Subject templates are available) to send to a client. Each Type includes a default as to whether or not to include the given Link which can be over-ridden using the dropdown:



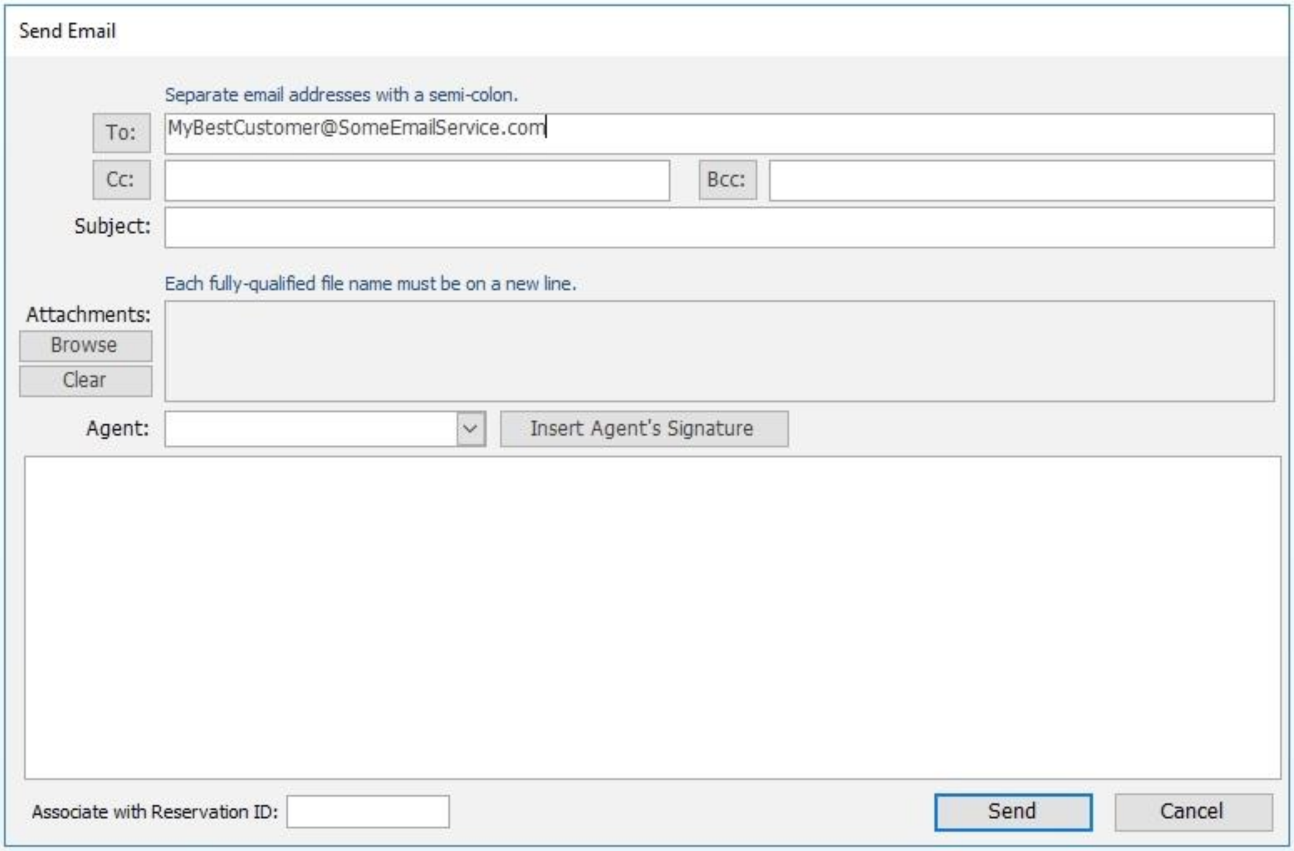
Similarly, the verbiage in the message text, as well as the Agent and Lead can be modified.

Once they click "Generate email", they can optionally select one or more attachments to send as part of the email. They can do this by selecting an "email group" (such as Rental Contract in yellow) which will automatically select individual documents, or by checking individual document paths:



GENERIC EMAIL FORMS

When you create an email, such as for individual Customers, Employees or Owners – that is, other than generating one within the Rental form - a more generic email template is used:



To, Cc, Bcc fields: You can enter one or more email addresses directly, separated by semi-colons. Or you can click the **To**, **Cc**, and **Bcc** buttons to display a list selector that includes all contacts for which an email address is configured, including the new Customer “Alt. Email” field.

The Subject and Body must have some content as this helps to avoid spam filters.

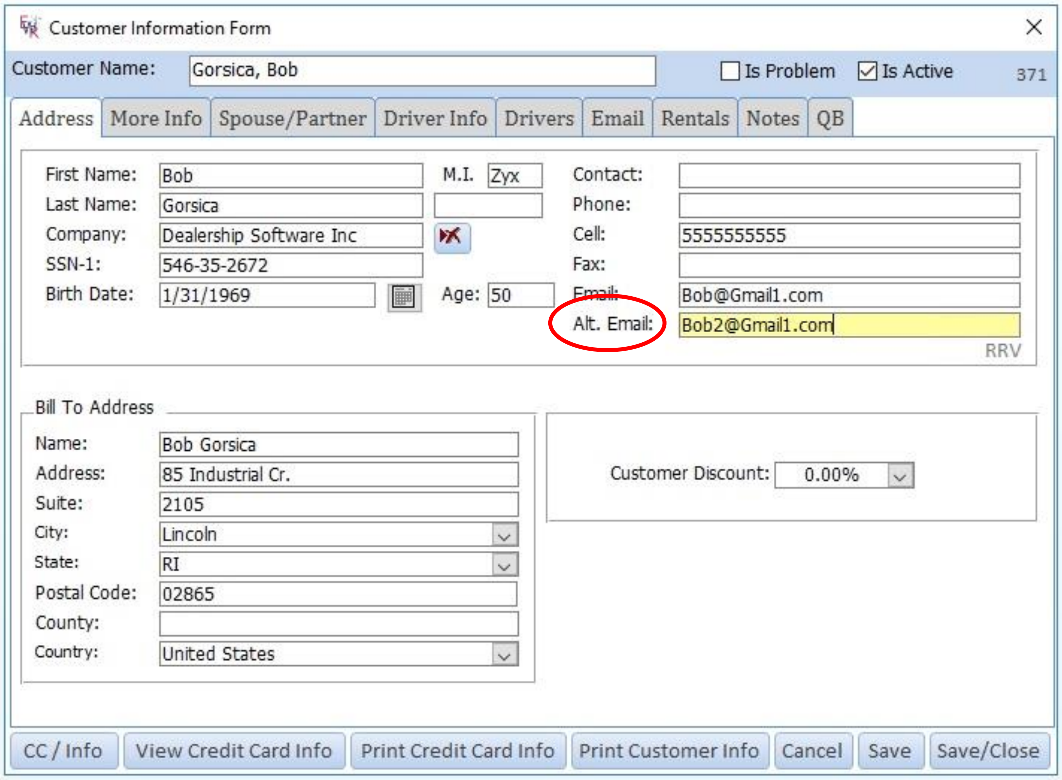
You can browse and attach multiple attachments; prior to this version this was limited to a single attachment.

An agent’s name must be selected, and you can quickly include their “signature” if they have one configured via their **Employee** form.

For tracking, notice at the bottom you can associate the email with a specific Rental ID if the system cannot itself determine the associated Rental.

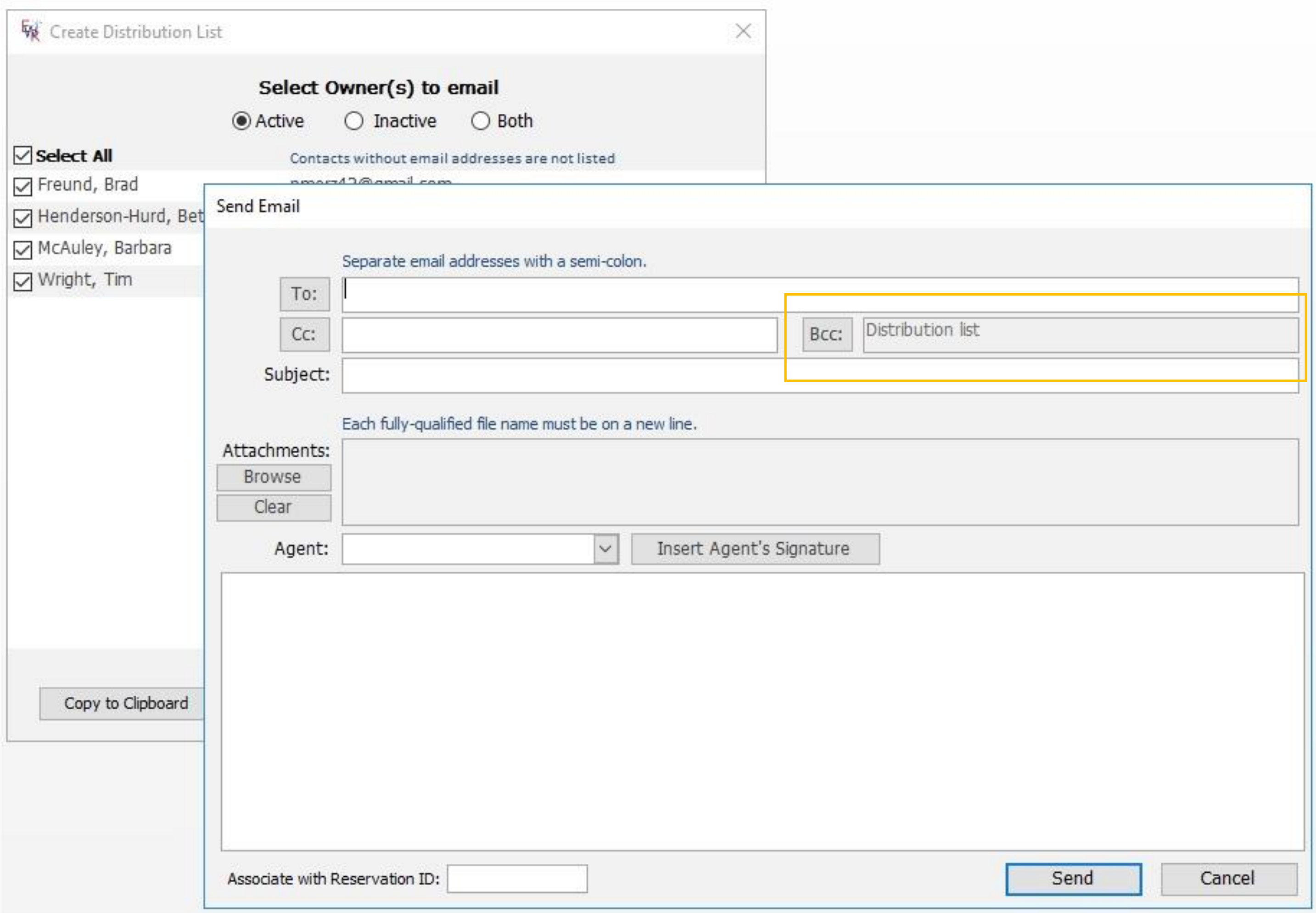
CUSTOMER FORM: ALT EMAIL ADDRESS

Address tab: A new "**Alt. Email**" field has been added. Some users were adding a second email address into the Email field as there was not an available field for this. When upgrading to v10.49, any secondary email addresses will be moved into the Alt. Email field, while their primary email address will continue to be displayed in the **Email** field. Both the Email and Alt. Email fields are now limited to a single email address.



OWNERS FORM: EMAIL ALL OWNERS

Email All Owners: After selecting the owners to which you want to send an email, a temporary "distribution list" (the email addresses you selected) is created. When you then compose the email to send, the distribution list is now included in the "Bcc" (blind carbon-copy) field, rather than the "To" field.



CUSTOMER PORTAL

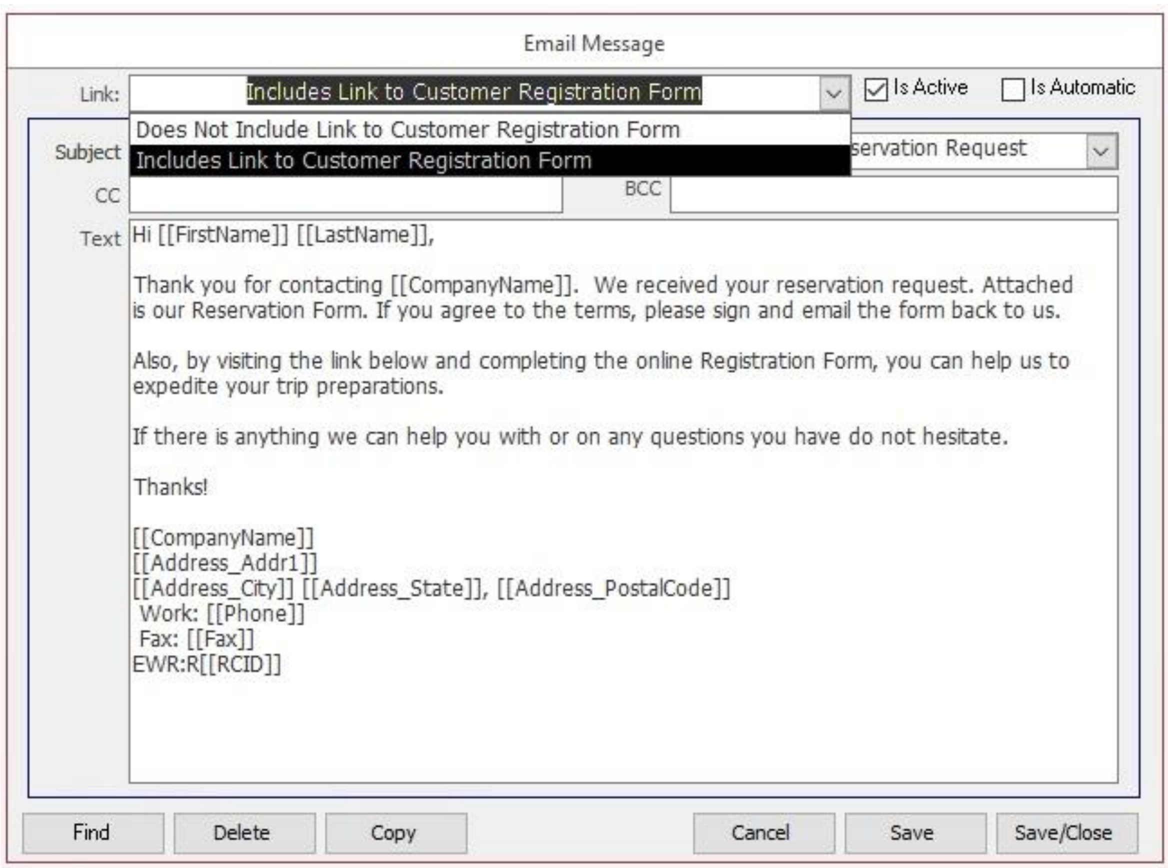
Online Registration Link Note for Email

Admin/Preferences/Defaults (System)

If a link to the Customer Portal is included when an email is generated on the EWR Rental form, this text will appear right above the link. So, for example, you may want to include text that encourages the customer to click the link and review their information.

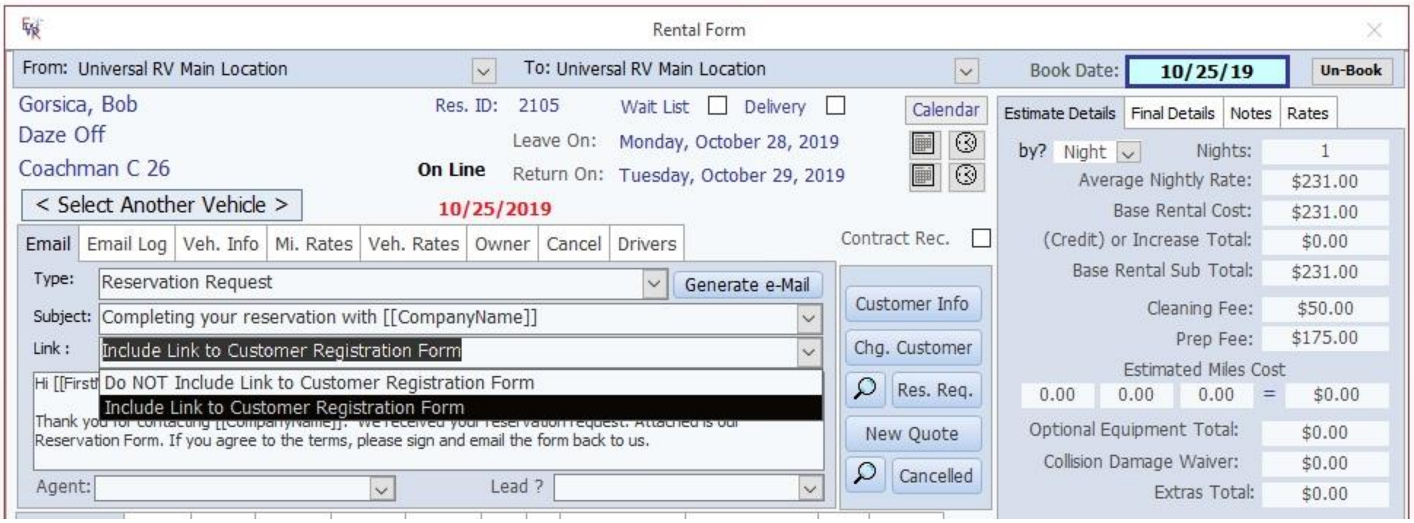
Email Templates

When creating/modifying an email template (e.g., Admin/eMail/Find Templates, select a category then specific template), a dropdown with a label of “Link” is now included. This is a link to the Customer Portal (a.k.a. Customer Registration Form). Use this dropdown to select whether or not to include the link to the portal by default. As it is only a default, the agent can select either option at the time they generate the email on the Rental form.



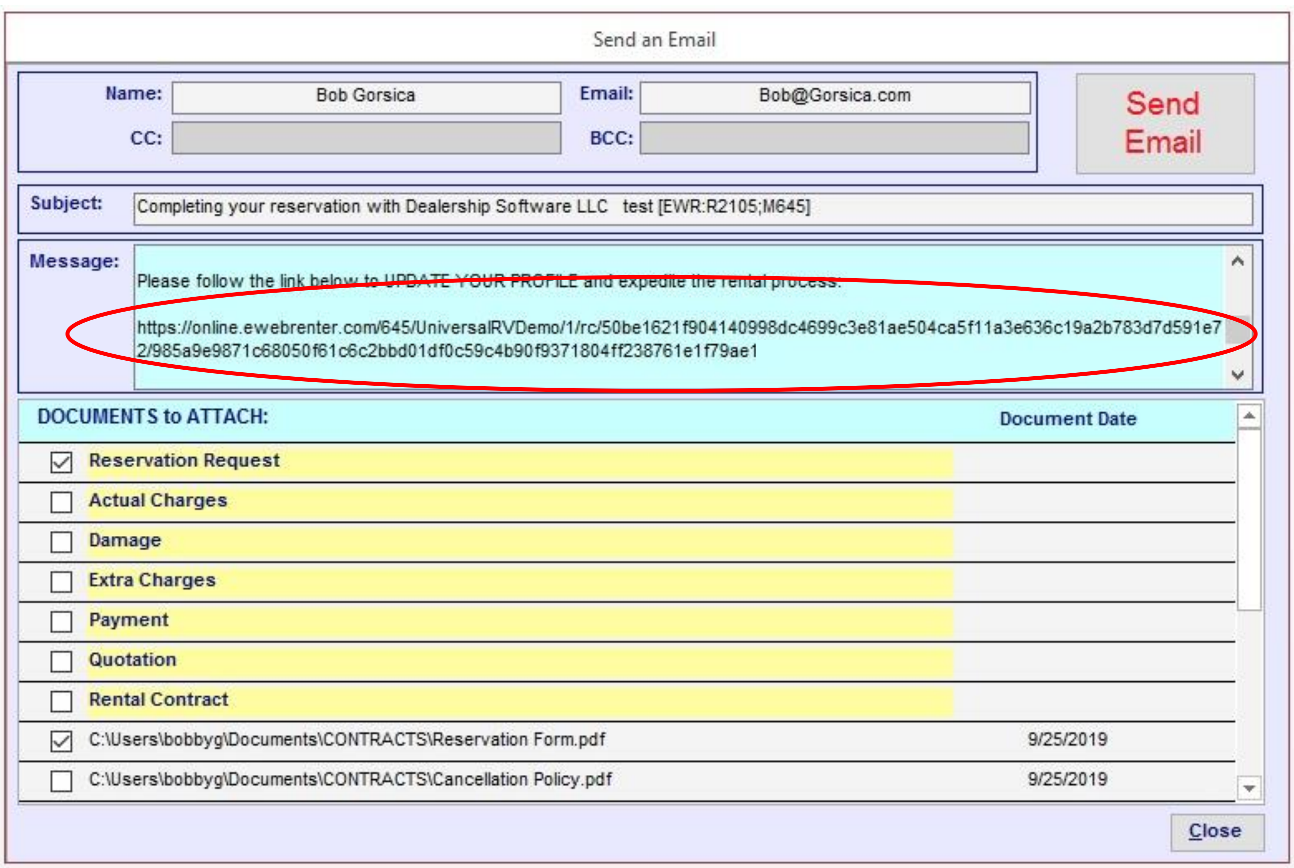
Email Link to Customer

As above, when sending an email, the agent can decide to override the email template's default value for including the link as shown below.



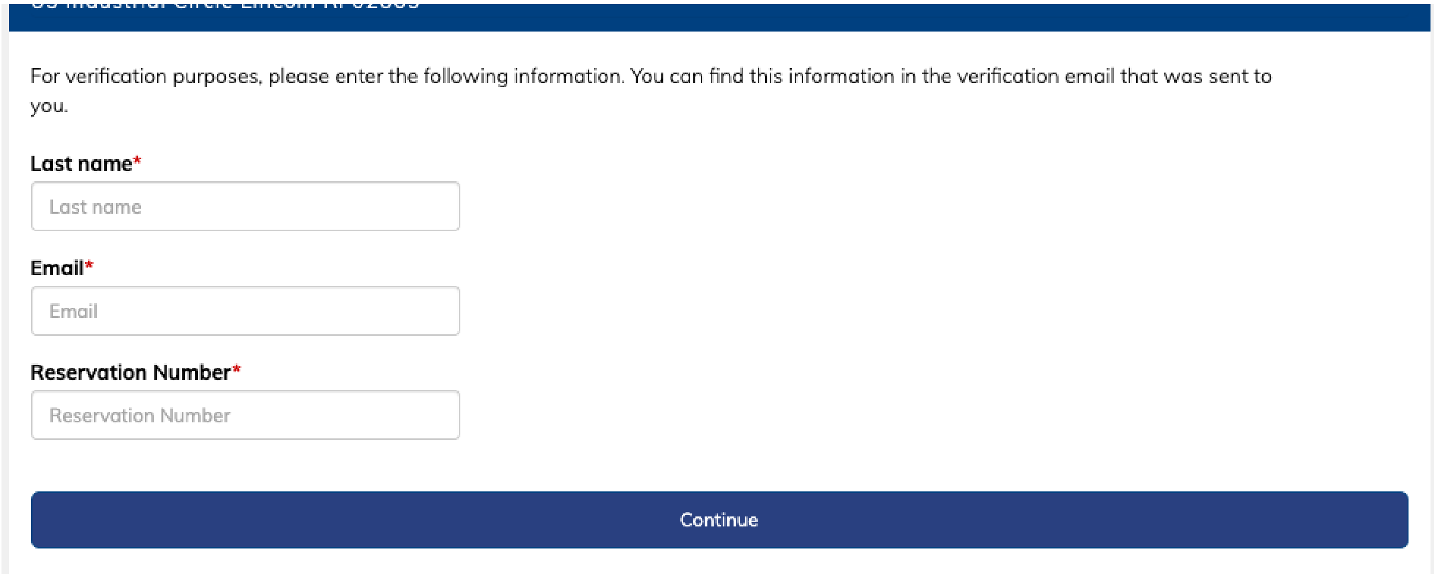
Link Displayed With Message

After clicking "**Generate e-Mail**", and then scrolling to the bottom of the *Message* field, you will see the link to the customer portal. This link is preceded by a default text message that you define under Admin/Preferences/Defaults/*Online Registration Link Note for Email*. In the example below, the message begins "Please follow…" and ends rental process:". Of course, you can change this message directly within the message field itself.

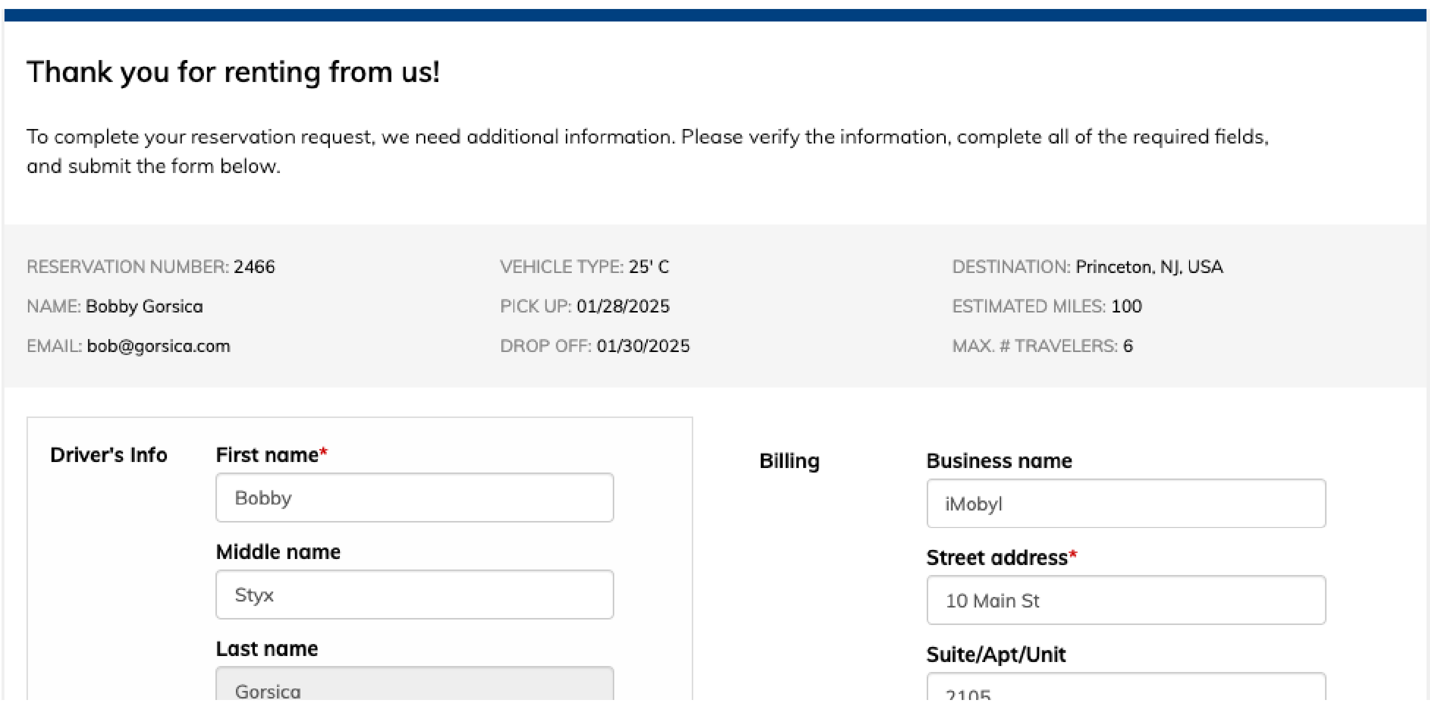


Customer Verification

When a customer clicks the link, they will be taken to a page where they verify themselves by typing in their last name, email and reservation number:



And once verified, they will be shown their registration information, and have the opportunity to complete missing fields:



See the Customer Port: Online Basics section of the eWebRenter Release Notes for more information regarding the fields that appear on this form, whether or not they are optional etc.