



# EWebRenter Email System

**DEALERSHIP SOFTWARE**

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Version 0.3

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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
  - o For Customers/Employees
  - o 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 best 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 your 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.

Location Information

Address Cancel Policy Insurance Binder Rental Contract Detail by Vehicle Category **Email Settings** Booking Portal Booking Portal Calendar QB

SMTP Email (POP) Configuration

Default Reply-To Address: RentalAgent@YourCompany.com

Outgoing SMTP Server: smtp.YourEmailService.com

Username: admin@YourCompany.com

Password: \*\*\*\*\*

Port: 587 (Requires SSL/TLS)

**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:R2466;M645] and Company ID: [EWR:R2466;M645]. When a customer replies to the email, you can use the Reservation ID to associate the email with the appropriate reservation.

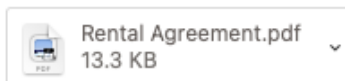
## Thank You! - Dealership Software LLC Demo [EWR:R2466;M645]



Rental Agent <dealershipsoftware3@gmail.com>

Wednesday, March 5, 2025 at 1:54 PM

To: Bobby Gorsica



+3 more

[Download All](#) • [Preview All](#)

A copy of this message is on the server.

Hello Bobby!

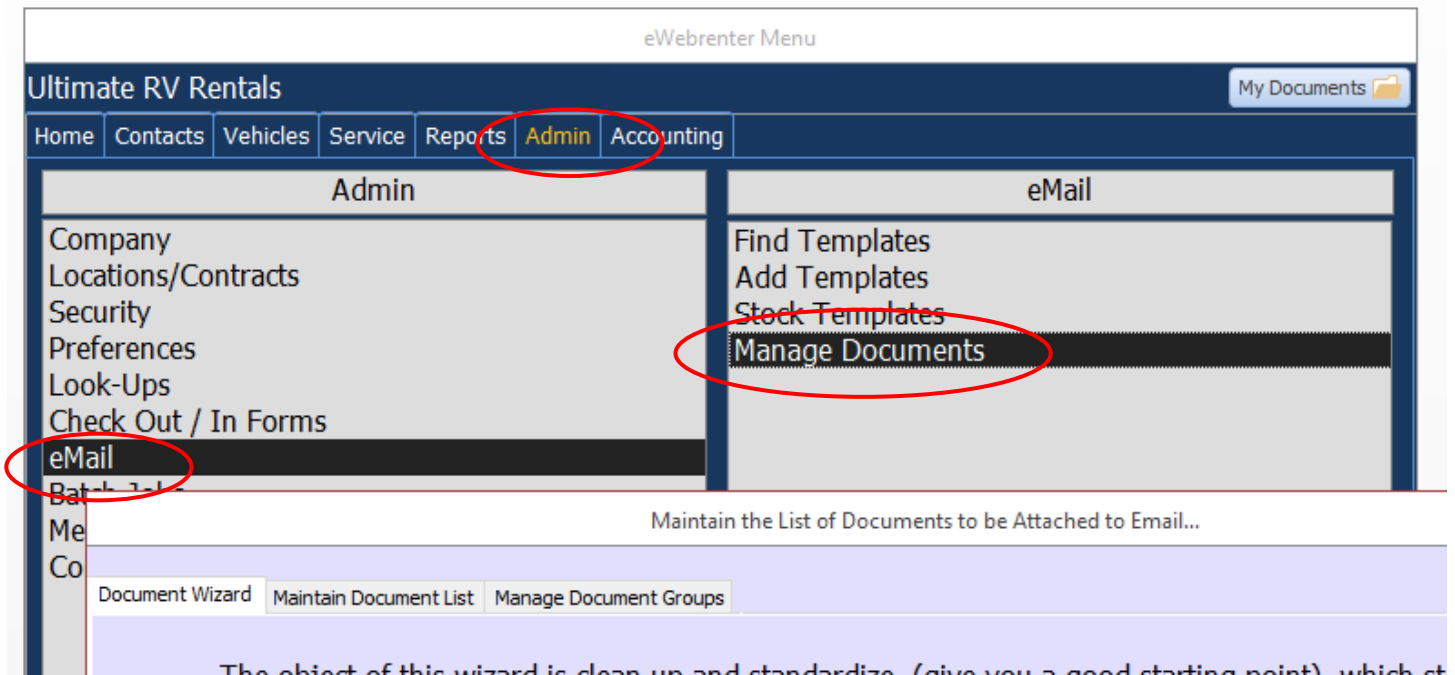
Thank you for completing this step in the rental process. We have received your information and have

## 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.

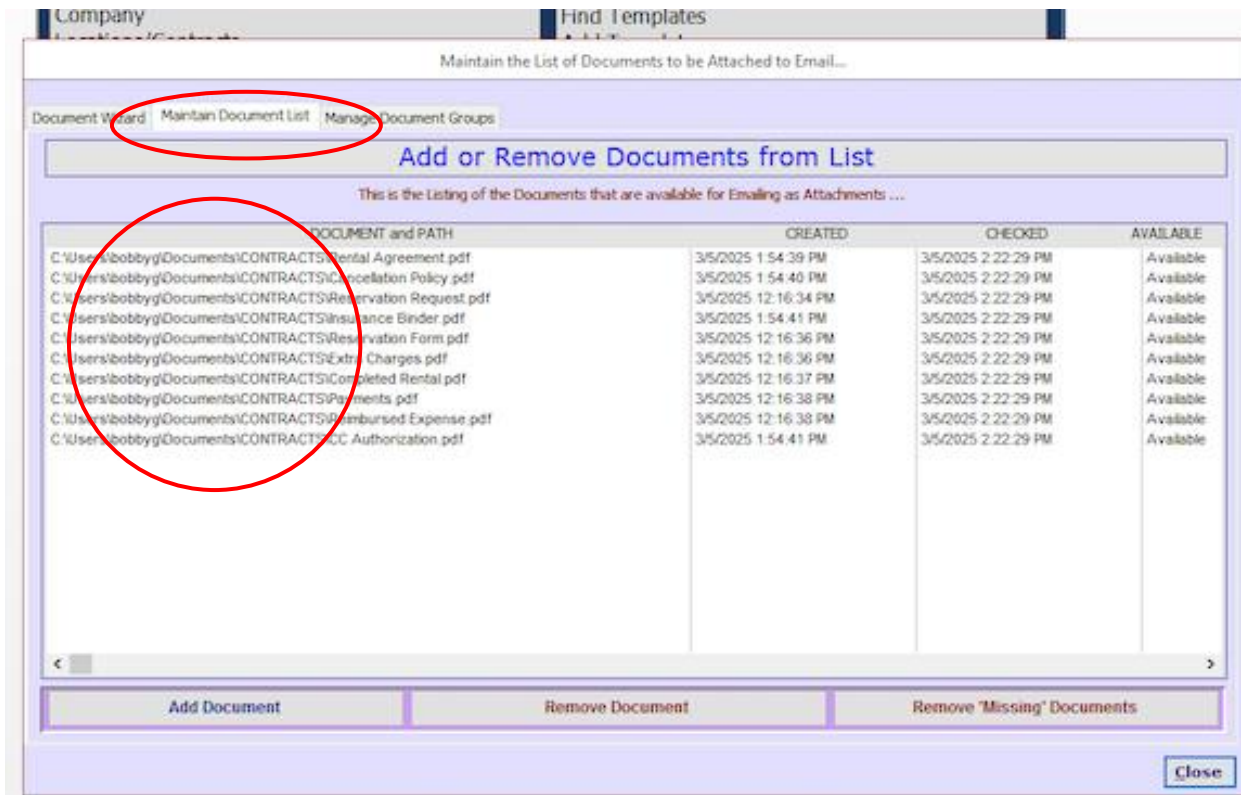
### Running the Document Wizard

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**.

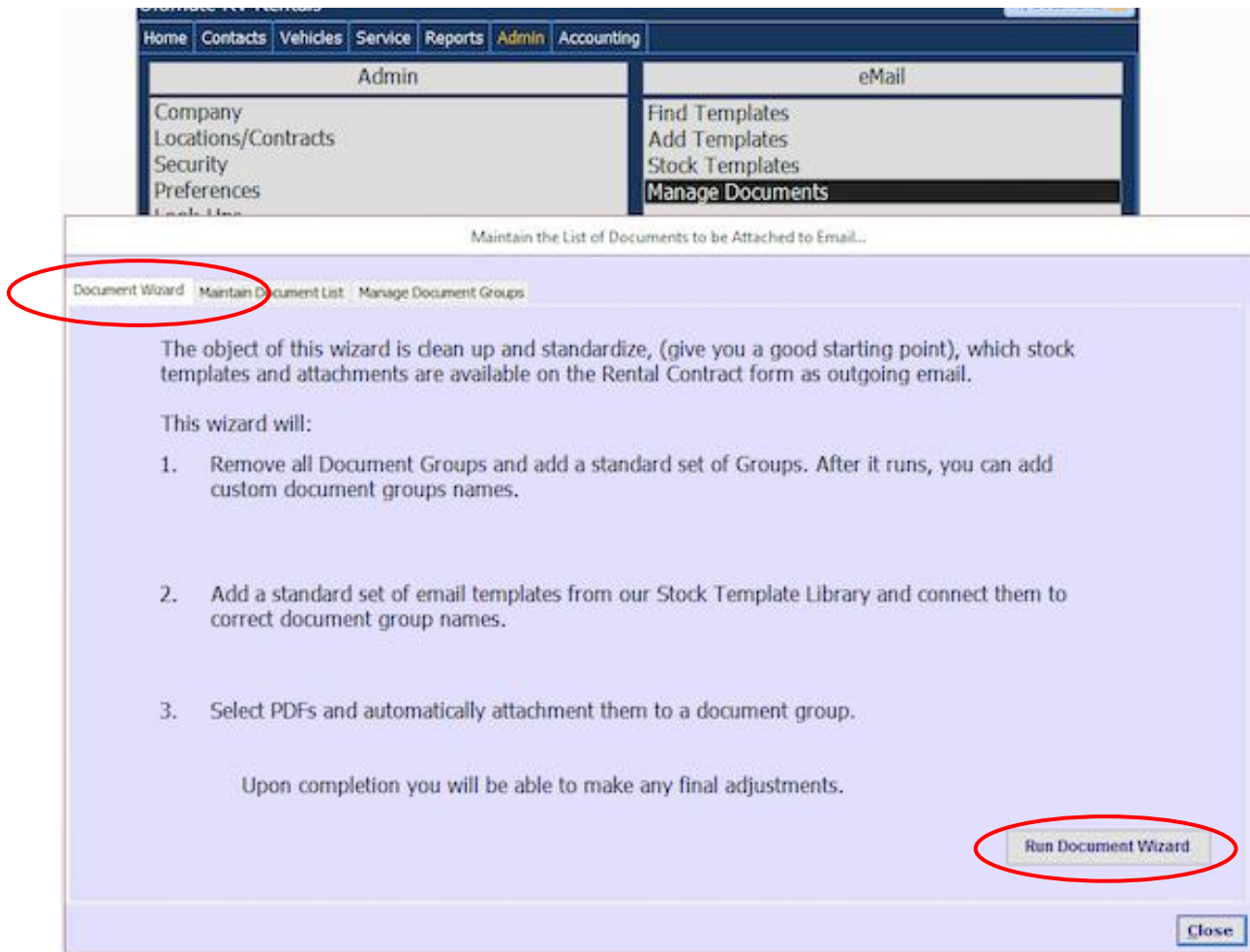
First, select the “Maintain Document List” tab, and look at the document PATHS:



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:

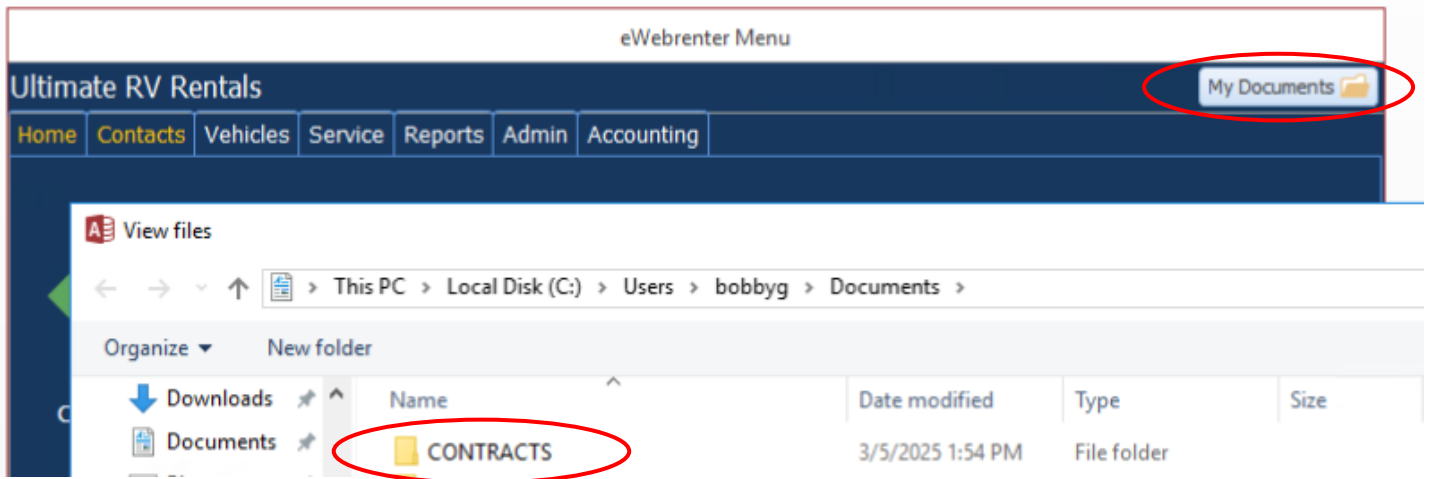


Running the Document Wizard creates a CONTRACTS folder in the User's Documents folder, and within the CONTRACTS folder, PDFs for all default contract types.



## 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 “My 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.

DOCUMENT and PATH	CREATED	CHECKED	AVAILABLE
C:\Users\WMcAuley\Documents\CONTRACTS\Rental Agreement.pdf	5/12/2023 3:59:18 PM	3/5/2025 5:42:58 PM	Available
C:\Users\WMcAuley\Documents\CONTRACTS\Cancellation Policy.pdf	5/12/2023 3:59:20 PM	3/5/2025 5:42:58 PM	Available
C:\Users\WMcAuley\Documents\CONTRACTS\Reservation Request.pdf	2/18/2019 1:32:06 PM	3/5/2025 5:42:58 PM	Available
C:\Users\WMcAuley\Documents\CONTRACTS\Insurance Binder.pdf	5/12/2023 3:59:21 PM	3/5/2025 5:42:58 PM	Available
C:\Users\WMcAuley\Documents\CONTRACTS\Reservation Form.pdf	1/8/2024 2:51:53 PM	3/5/2025 5:42:58 PM	Available
C:\Users\WMcAuley\Documents\CONTRACTS\Extra Charges.pdf	2/18/2019 1:32:11 PM	3/5/2025 5:42:58 PM	Available
C:\Users\WMcAuley\Documents\CONTRACTS\Completed Rental.pdf	2/18/2019 1:32:13 PM	3/5/2025 5:42:58 PM	Available
C:\Users\WMcAuley\Documents\CONTRACTS\Payments.pdf	2/18/2019 1:32:14 PM	3/5/2025 5:42:58 PM	Available
C:\Users\WMcAuley\Documents\CONTRACTS\Reimbursed Expense.pdf	2/18/2019 1:32:15 PM	3/5/2025 5:42:58 PM	Available
C:\Users\WMcAuley\Documents\CONTRACTS\CC Authorization.pdf	5/12/2023 3:59:22 PM	3/5/2025 5:42:58 PM	Available

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.

Manage the Document Groups to be Attached to Email...

Document Wizard | Maintain Document List | Manage Document Groups

**Adding & Removing Document Groups**

Group Type:

To Add a Group, type new Group Name in box above, then click {Add Group} button:

To DELETE a Group, select Group from List, then click {Delete Group} button:

**Adding Documents to Groups:**

To Add a Document to a Group, select the GROUP from List at right, select Document from List below, and click on {Add Document} button:

C:\Users\bobbyg\Documents\CONTRACTS\Cancellation Policy.pdf  
C:\Users\bobbyg\Documents\CONTRACTS\CC Authorization.pdf  
C:\Users\bobbyg\Documents\CONTRACTS\Completed Rental.pdf  
C:\Users\bobbyg\Documents\CONTRACTS\Extra Charges.pdf  
C:\Users\bobbyg\Documents\CONTRACTS\Insurance Binder.pdf  
C:\Users\bobbyg\Documents\CONTRACTS\Payments.pdf  
C:\Users\bobbyg\Documents\CONTRACTS\Reimbursed Expense.pdf  
C:\Users\bobbyg\Documents\CONTRACTS\Rental Agreement.pdf  
C:\Users\bobbyg\Documents\CONTRACTS\Reservation Form.pdf  
C:\Users\bobbyg\Documents\CONTRACTS\Reservation Request.pdf

**Document Groups**

Reservation Request  
Quotation  
Payment  
Extra Charges  
Actual Charges  
**Rental Contract**  
Damage

**Documents In Selected Group**

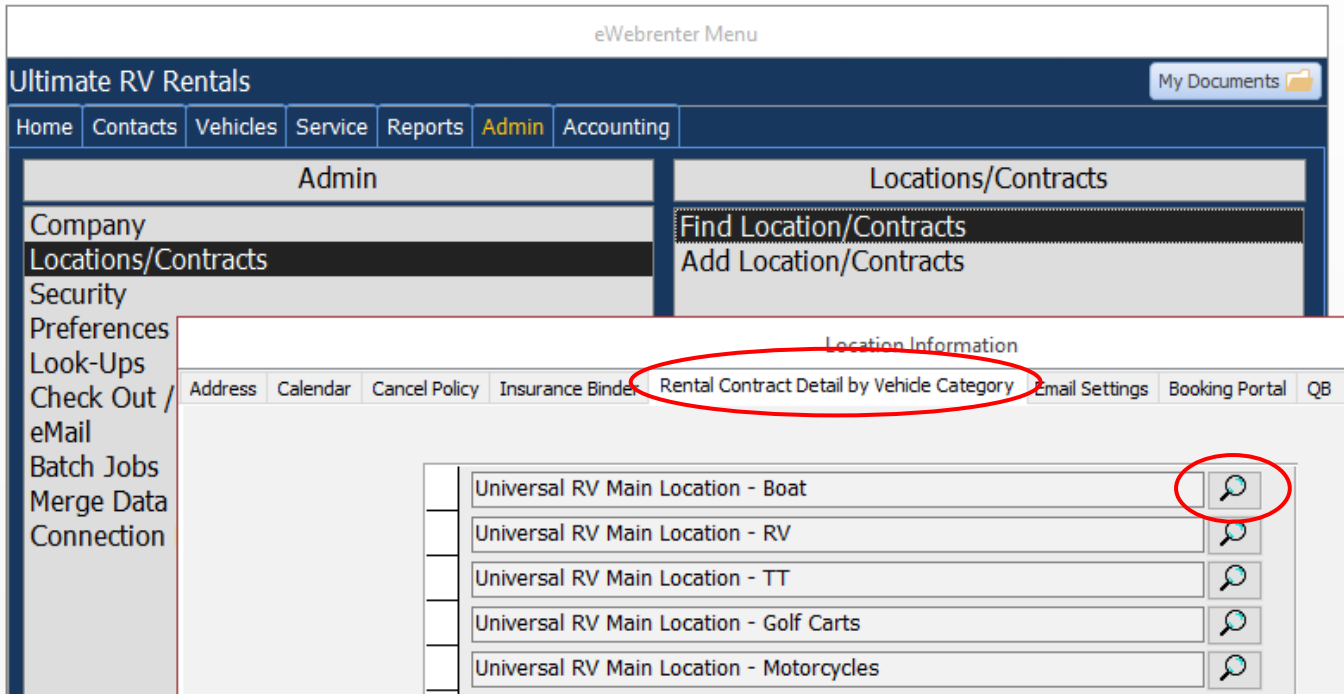
C:\Users\bobbyg\Documents\CONTRACTS\Cancellation Policy.pdf  
C:\Users\bobbyg\Documents\CONTRACTS\CC Authorization.pdf  
C:\Users\bobbyg\Documents\CONTRACTS\Insurance Binder.pdf  
C:\Users\bobbyg\Documents\CONTRACTS\Rental Agreement.pdf

To Remove a Document, select Document from List above, and click {Remove Document} button:

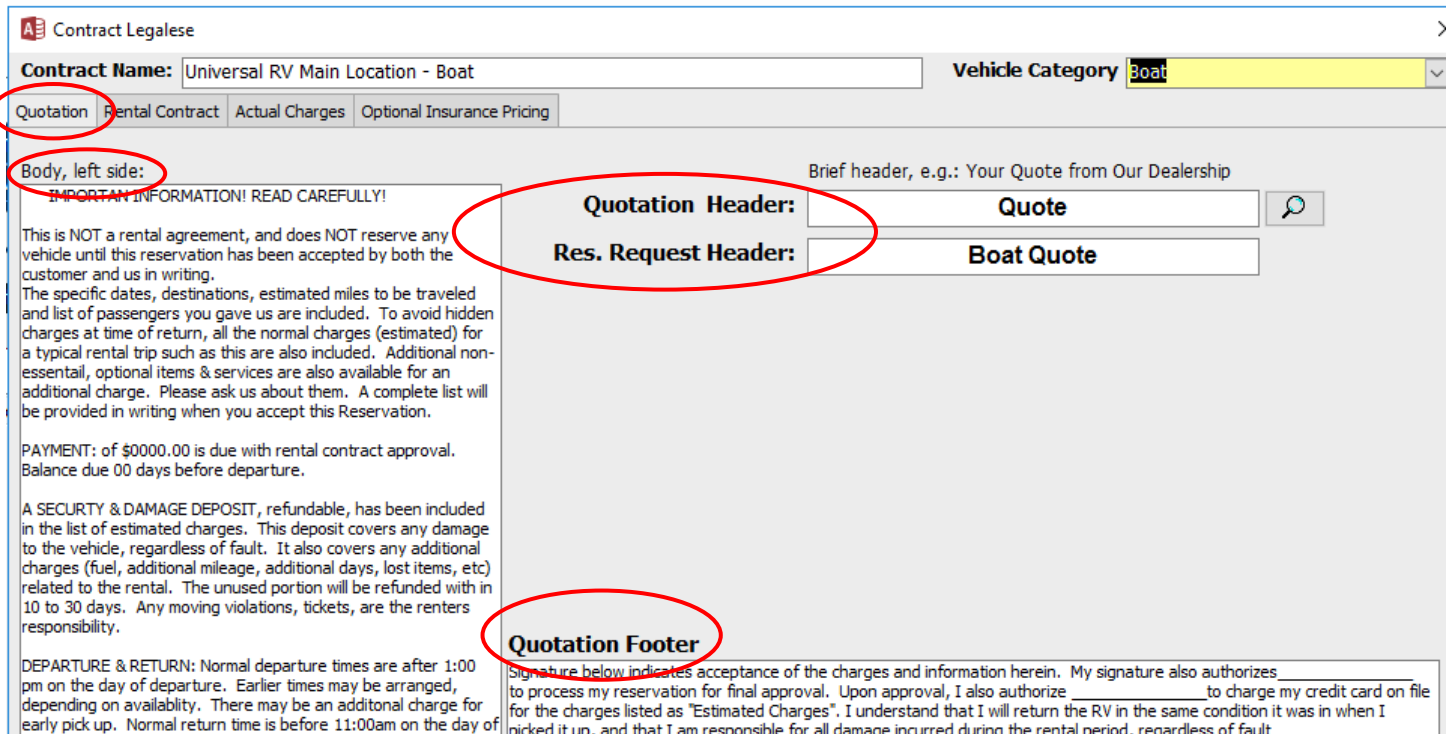
Once you have your Documents and Groups configured, they will appear as selectable when you generate an email from the Rental Form.

## 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**:



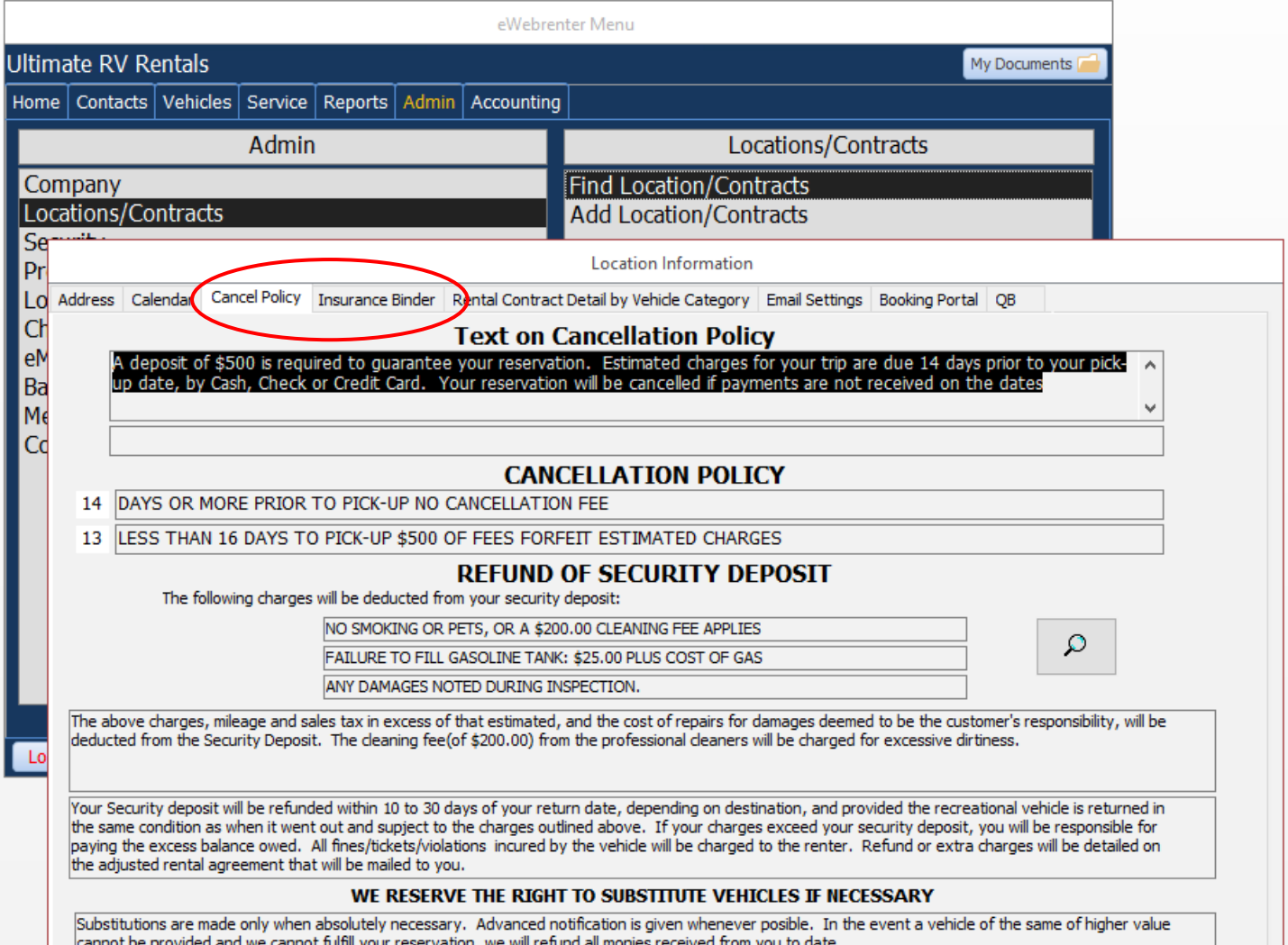
Selecting a Vehicle Category by clicking the magnifying glass will open the Contract Legalese form:



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

## Other Document Customization

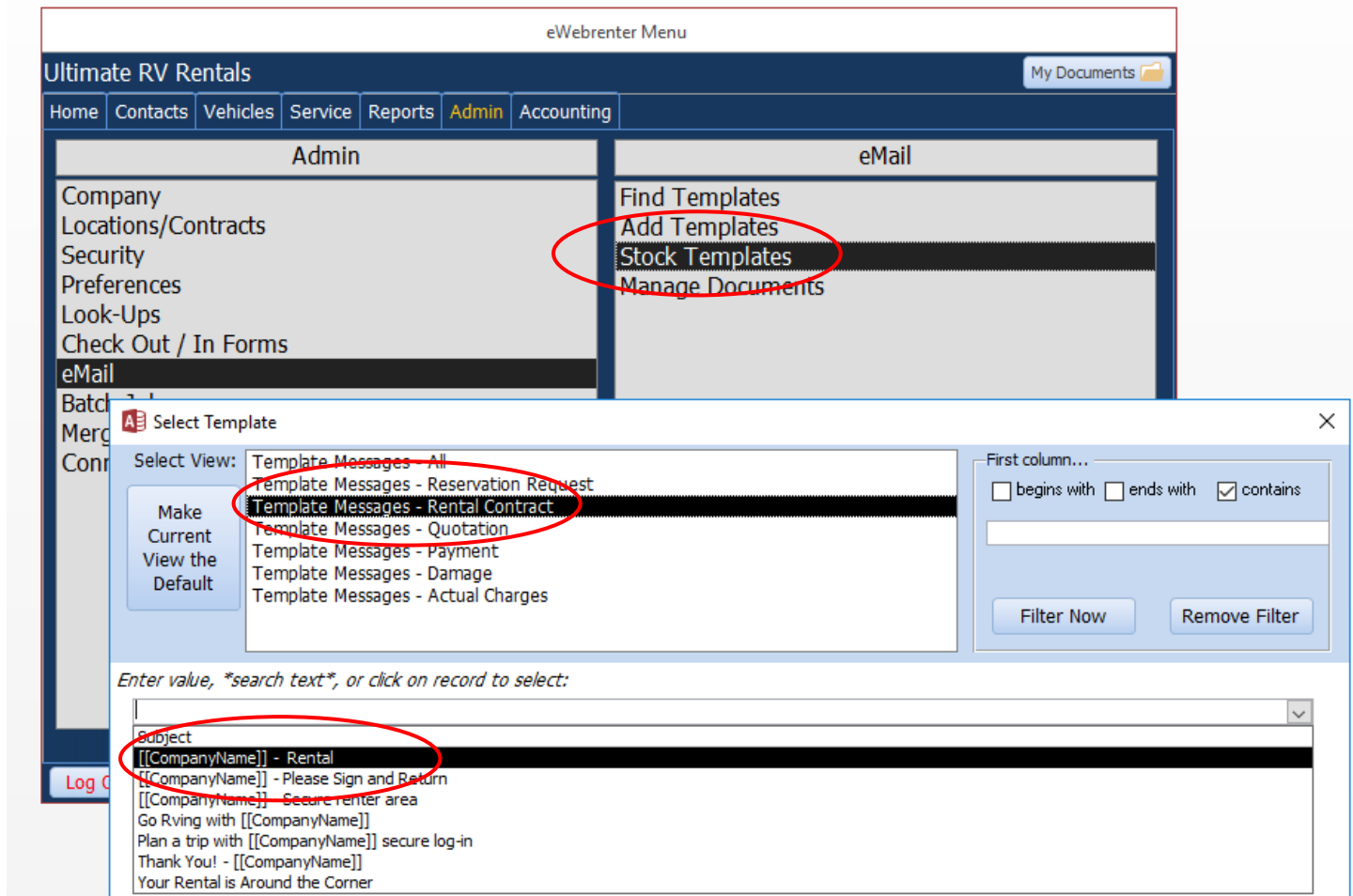
You can customize verbiage for the Cancellation Policy and Insurance Binder as well, using the “**Cancel Policy**” and “**Insurance Binder**” tabs on the Location Information page (**Admin -> Locations/Contracts -> Find Location/Contracts (Select)**). For example:



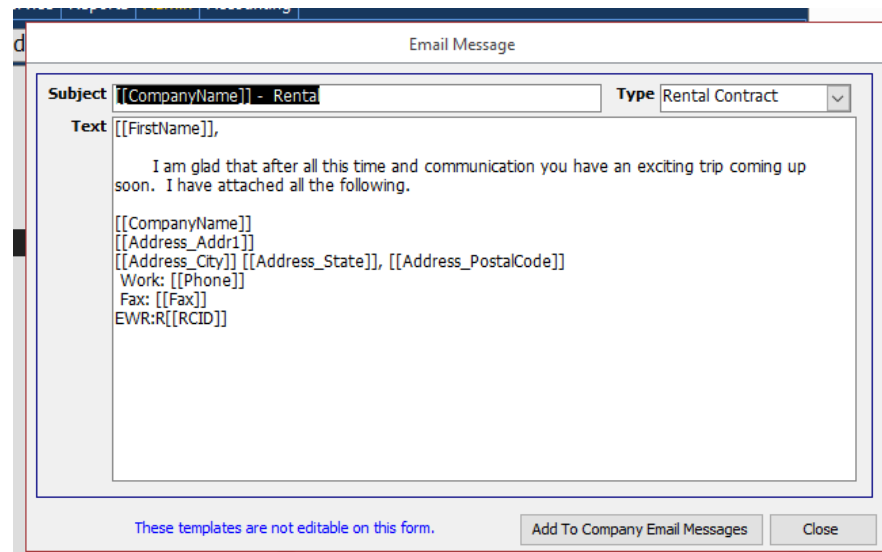
The screenshot displays the eWebrenter Admin interface. At the top, there is a navigation menu with options: Home, Contacts, Vehicles, Service, Reports, Admin, and Accounting. Below this, there are two main sections: 'Admin' and 'Locations/Contracts'. The 'Locations/Contracts' section includes options for 'Find Location/Contracts' and 'Add Location/Contracts'. The 'Location Information' page is open, showing tabs for 'Address', 'Calendar', 'Cancel Policy', 'Insurance Binder', 'Rental Contract Detail by Vehicle Category', 'Email Settings', 'Booking Portal', and 'QB'. The 'Cancel Policy' and 'Insurance Binder' tabs are circled in red. The main content area is titled 'Text on Cancellation Policy' and contains a text area with the following text: 'A deposit of \$500 is required to guarantee your reservation. Estimated charges for your trip are due 14 days prior to your pick-up date, by Cash, Check or Credit Card. Your reservation will be cancelled if payments are not received on the dates'. Below this, there are two sections: 'CANCELLATION POLICY' and 'REFUND OF SECURITY DEPOSIT'. The 'CANCELLATION POLICY' section has two rows: '14 DAYS OR MORE PRIOR TO PICK-UP NO CANCELLATION FEE' and '13 LESS THAN 16 DAYS TO PICK-UP \$500 OF FEES FORFEIT ESTIMATED CHARGES'. The 'REFUND OF SECURITY DEPOSIT' section has a heading and a list of charges: 'NO SMOKING OR PETS, OR A \$200.00 CLEANING FEE APPLIES', 'FAILURE TO FILL GASOLINE TANK: \$25.00 PLUS COST OF GAS', and 'ANY DAMAGES NOTED DURING INSPECTION.'. Below this, there is a paragraph: 'The above charges, mileage and sales tax in excess of that estimated, and the cost of repairs for damages deemed to be the customer's responsibility, will be deducted from the Security Deposit. The cleaning fee(of \$200.00) from the professional cleaners will be charged for excessive dirtiness.' and another paragraph: 'Your Security deposit will be refunded within 10 to 30 days of your return date, depending on destination, and provided the recreational vehicle is returned in the same condition as when it went out and subject to the charges outlined above. If your charges exceed your security deposit, you will be responsible for paying the excess balance owed. All fines/tickets/violations incurred by the vehicle will be charged to the renter. Refund or extra charges will be detailed on the adjusted rental agreement that will be mailed to you.' At the bottom, there is a section titled 'WE RESERVE THE RIGHT TO SUBSTITUTE VEHICLES IF NECESSARY' with the text: 'Substitutions are made only when absolutely necessary. Advanced notification is given whenever possible. In the event a vehicle of the same or higher value cannot be provided and we cannot fulfill your reservation, we will refund all monies received from you to date.'

# MANAGING EMAIL TEMPLATES

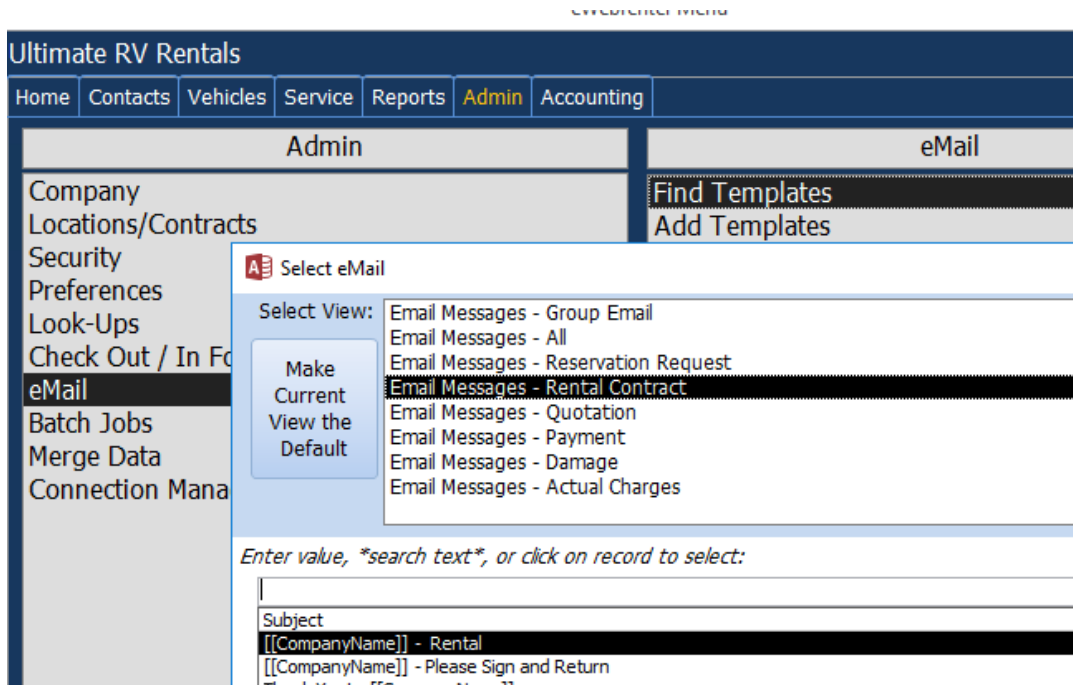
Once the documents are customized to your liking, the next thing to do is to customize the verbiage in for the emails used which will contain the attached documents. EWR provides a number of “stock” email templates page (**Admin -> eMail -> Stock Templates**):



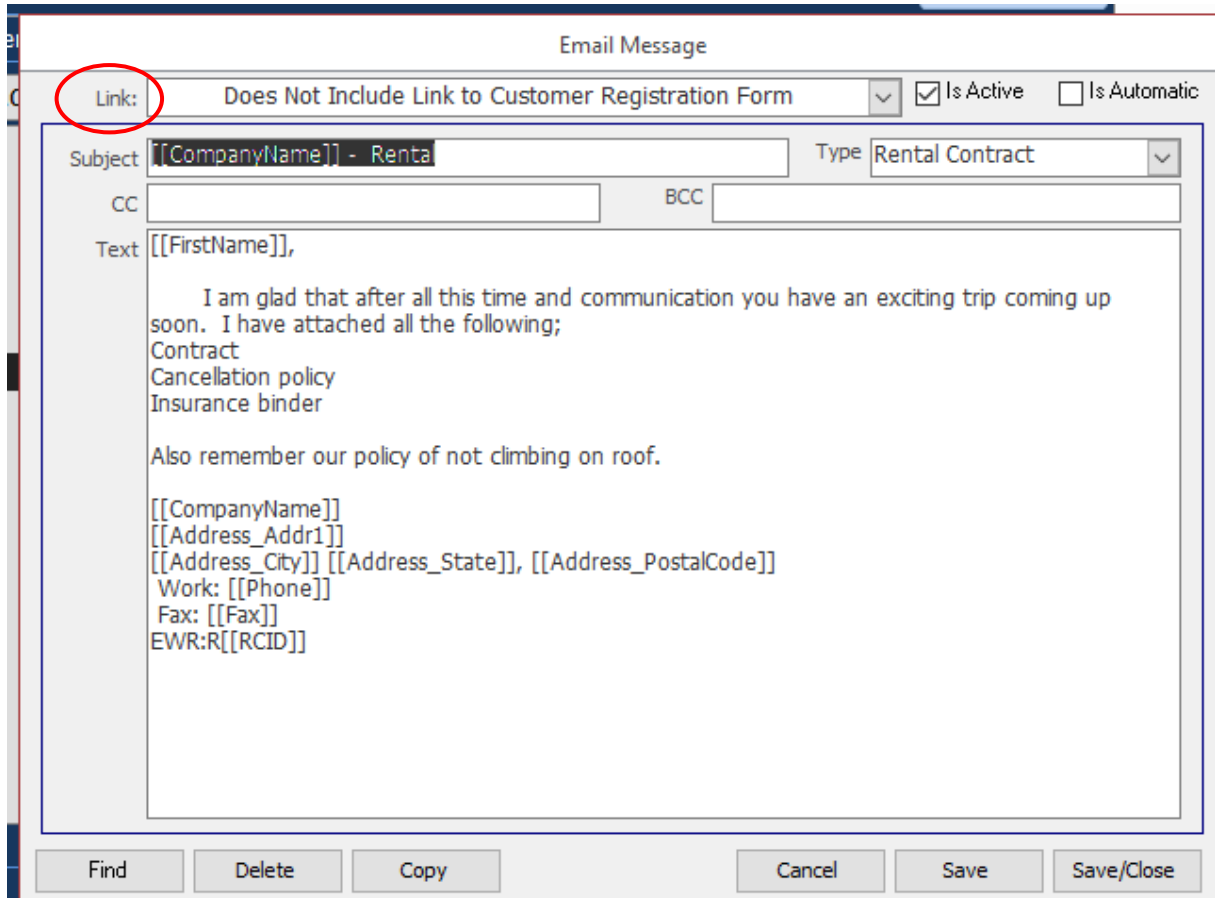
The Templates are categorized by “Reservation Request”, “Rental Contract” etc. For example, selecting the “Rental Contract” category will display several templates specified by their Subject line. For example, selecting the Subject “**[[CompanyName]] – Rental**” displays:



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 unique 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:
  - o **[[LastName]]:** Customer last name
  - o **[[Address\_Addr1]]:** Company Street Address
  - o **[[Address\_City]]:** Company City
  - o **[[Address\_State]]:** Company State
  - o **[[Address\_Postal Code]]:** Company Postal Code
  - o **[[Phone]]:** Company Work Phone
  - o **[[Fax]]:** Company Fax
  - o **[[CompanyWebSite]]”:** Company Website

And some less common ones:

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

The screenshot shows a software interface for generating an email. At the top, there is a navigation bar with tabs: "Email", "Email Log", "Veh. Info", "Mi. Rates", "Veh. Rates", "Owner", "Cancel", and "Drivers". The "Email" tab is active. Below the tabs, there is a "Type:" dropdown menu set to "Rental Contract" and a "Generate e-Mail" button. The "Subject:" field contains "Thank You! - [[CompanyName]]" and has a dropdown arrow. The "Link:" field contains "Do NOT Include Link to Customer Registration Form" and also has a dropdown arrow. Below these fields is a text area with a pre-written message: "Hello [[FirstName]], Thank you for completing this step in the rental process. We have received your information and have reviewed it. Attached is the remainder of the documents that you still need to look over and keep for your records. Also, we have attached the rental agreement and cancellation policy to be signed and sent back by". At the bottom, there are "Agent:" and "Lead ?" dropdown menus.

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:

The screenshot shows a "Send an Email" dialog box. It has fields for "Name:" (Bobby Gorsica), "Email:" (bob@Gorsica.com), "CC:", and "BCC:". A "Send Email" button is on the right. The "Subject:" field contains "Thank You! - Dealership Software LLC Demo [EWR:R2417;M0]". The "Message:" field contains the same pre-written message as in the previous screenshot. Below the message is a section titled "DOCUMENTS to ATTACH:" with a table. The table has two columns: "DOCUMENTS to ATTACH:" and "Document Date". The first row, "Rental Contract", is highlighted in yellow and has its checkbox checked. Other rows include "Actual Charges", "Damage", "Extra Charges", "Payment", "Quotation", and "Reservation Request", all with unchecked checkboxes. The last two rows are "C:\Users\bobbyg\Documents\CONTRACTS\Cancellation Policy.pdf" and "C:\Users\bobbyg\Documents\CONTRACTS\CC Authorization.pdf", both with checked checkboxes and a date of 9/25/2019. A "Close" button is at the bottom right.

DOCUMENTS to ATTACH:	Document Date
<input checked="" type="checkbox"/> Rental Contract	
<input type="checkbox"/> Actual Charges	
<input type="checkbox"/> Damage	
<input type="checkbox"/> Extra Charges	
<input type="checkbox"/> Payment	
<input type="checkbox"/> Quotation	
<input type="checkbox"/> Reservation Request	
<input checked="" type="checkbox"/> C:\Users\bobbyg\Documents\CONTRACTS\Cancellation Policy.pdf	9/25/2019
<input checked="" type="checkbox"/> C:\Users\bobbyg\Documents\CONTRACTS\CC Authorization.pdf	9/25/2019

## 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:

The screenshot shows a 'Send Email' form with the following fields and controls:

- To:** Text input field containing 'MyBestCustomer@SomeEmailService.com'. A button labeled 'To:' is positioned to the left of the input.
- Cc:** Text input field. A button labeled 'Cc:' is positioned to the left of the input.
- Bcc:** Text input field. A button labeled 'Bcc:' is positioned to the left of the input.
- Subject:** Text input field.
- Attachments:** Section with a 'Browse' button and a 'Clear' button, followed by a large text area for listing attachments.
- Agent:** A dropdown menu with a downward arrow, followed by an 'Insert Agent's Signature' button.
- Body:** A large, empty text area for the email content.
- Associate with Reservation ID:** A text input field at the bottom left.
- Buttons:** 'Send' and 'Cancel' buttons at the bottom right.

Instructions within the form include: 'Separate email addresses with a semi-colon.' and 'Each fully-qualified file name must be on a new line.'

*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.

The screenshot shows a software window titled "Customer Information Form" with a close button (X) in the top right corner. The window contains a form for a customer named "Gorsica, Bob". At the top, there are checkboxes for "Is Problem" (unchecked) and "Is Active" (checked), and a number "371". Below this is a tabbed interface with tabs for "Address", "More Info", "Spouse/Partner", "Driver Info", "Drivers", "Email", "Rentals", "Notes", and "QB". The "Email" tab is selected. The form fields are organized into two columns. The left column includes: First Name (Bob), Last Name (Gorsica), Company (Dealership Software Inc), SSN-1 (546-35-2672), Birth Date (1/31/1969), and Age (50). The right column includes: Contact, Phone, Cell (5555555555), Fax, Email (Bob@Gmail1.com), and Alt. Email (Bob2@Gmail1.com). The "Alt. Email" field is highlighted in yellow and circled in red. Below the main form is a "Bill To Address" section with fields for Name (Bob Gorsica), Address (85 Industrial Cr.), Suite (2105), City (Lincoln), State (RI), Postal Code (02865), County, and Country (United States). To the right of the address fields is a "Customer Discount" field set to 0.00%. At the bottom of the window is a row of buttons: "CC / Info", "View Credit Card Info", "Print Credit Card Info", "Print Customer Info", "Cancel", "Save", and "Save/Close".

Customer Name:	Gorsica, Bob			<input type="checkbox"/> Is Problem	<input checked="" type="checkbox"/> Is Active	371		
Address	More Info	Spouse/Partner	Driver Info	Drivers	Email	Rentals	Notes	QB
First Name:	Bob	M.I.	Zyx	Contact:				
Last Name:	Gorsica			Phone:				
Company:	Dealership Software Inc			Cell:	5555555555			
SSN-1:	546-35-2672			Fax:				
Birth Date:	1/31/1969		Age:	50	Email:	Bob@Gmail1.com		
				Alt. Email:	Bob2@Gmail1.com			

RRV

Bill To Address	Customer Discount: 0.00%
Name: Bob Gorsica	
Address: 85 Industrial Cr.	
Suite: 2105	
City: Lincoln	
State: RI	
Postal Code: 02865	
County:	
Country: United States	

CC / Info View Credit Card Info Print Credit Card Info Print Customer Info Cancel Save Save/Close

# 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.

The image shows two overlapping dialog boxes from a software application. The background dialog is titled "Create Distribution List" and has a close button (X) in the top right corner. It contains a section titled "Select Owner(s) to email" with three radio buttons: "Active" (selected), "Inactive", and "Both". Below this is a list of names with checkboxes: "Select All", "Freund, Brad", "Henderson-Hurd, Bet", "McAuley, Barbara", and "Wright, Tim". A note says "Contacts without email addresses are not listed" with an example email address "owner12@email.com". A "Copy to Clipboard" button is at the bottom left.

The foreground dialog is titled "Send Email" and has a close button (X) in the top right corner. It contains a "To:" field with a note "Separate email addresses with a semi-colon." Below it are "Cc:" and "Bcc:" fields. The "Bcc:" field contains the text "Distribution list" and is highlighted with a yellow rectangular box. Below these is a "Subject:" field. There is an "Attachments:" section with "Browse" and "Clear" buttons and a note "Each fully-qualified file name must be on a new line." Below that is an "Agent:" dropdown menu and an "Insert Agent's Signature" button. At the bottom, there is a large empty text area, an "Associate with Reservation ID:" field, and "Send" and "Cancel" buttons.

# 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.

The screenshot shows the 'Email Message' configuration window. At the top, there are checkboxes for 'Is Active' (checked) and 'Is Automatic' (unchecked). Below this, the 'Link' dropdown is set to 'Includes Link to Customer Registration Form'. The 'Subject' dropdown is set to 'Reservation Request'. The 'Text' area contains the following template text:

Hi [[FirstName]] [[LastName]],

Thank you for contacting [[CompanyName]]. We received your reservation request. Attached is our Reservation Form. If you agree to the terms, please sign and email the form back to us.

Also, by visiting the link below and completing the online Registration Form, you can help us to expedite your trip preparations.

If there is anything we can help you with or on any questions you have do not hesitate.

Thanks!

[[CompanyName]]  
[[Address\_Addr1]]  
[[Address\_City]] [[Address\_State]], [[Address\_PostalCode]]  
Work: [[Phone]]  
Fax: [[Fax]]  
EWR:R[[RCID]]

At the bottom of the window, there are buttons for 'Find', 'Delete', 'Copy', 'Cancel', 'Save', and 'Save/Close'.

## 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.

The screenshot shows the 'Rental Form' window. At the top, it displays 'From: Universal RV Main Location' and 'To: Universal RV Main Location'. The 'Book Date' is set to '10/25/19'. The customer information includes 'Gorsica, Bob', 'Daze Off', and 'Coachman C 26'. The reservation ID is '2105', and the dates are 'Monday, October 28, 2019' (Leave On) and 'Tuesday, October 29, 2019' (Return On). The status is 'On Line'. There are buttons for 'Calendar', 'Estimate Details', 'Final Details', 'Notes', and 'Rates'. The 'Estimate Details' tab is active, showing a table with columns for 'by?', 'Nights', and 'Rates'. The table contains one row: 'Night' (1), 'Average Nightly Rate' (\$231.00), 'Base Rental Cost' (\$231.00), '(Credit) or Increase Total' (\$0.00), 'Base Rental Sub Total' (\$231.00), 'Cleaning Fee' (\$50.00), 'Prep Fee' (\$175.00), 'Estimated Miles Cost' (0.00, 0.00, 0.00 = \$0.00), 'Optional Equipment Total' (\$0.00), 'Collision Damage Waiver' (\$0.00), and 'Extras Total' (\$0.00). On the left, there are tabs for 'Email', 'Email Log', 'Veh. Info', 'Mi. Rates', 'Veh. Rates', 'Owner', 'Cancel', and 'Drivers'. The 'Email' tab is selected, showing a 'Type' dropdown set to 'Reservation Request' and a 'Generate e-Mail' button. The 'Subject' field contains 'Completing your reservation with [[CompanyName]]'. The 'Link' dropdown is set to 'Include Link to Customer Registration Form'. The message body starts with 'Hi [[First]] Do NOT Include Link to Customer Registration Form' and 'Include Link to Customer Registration Form'. There is a 'Contract Rec.' checkbox. At the bottom, there are 'Agent' and 'Lead ?' dropdowns.

## 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.

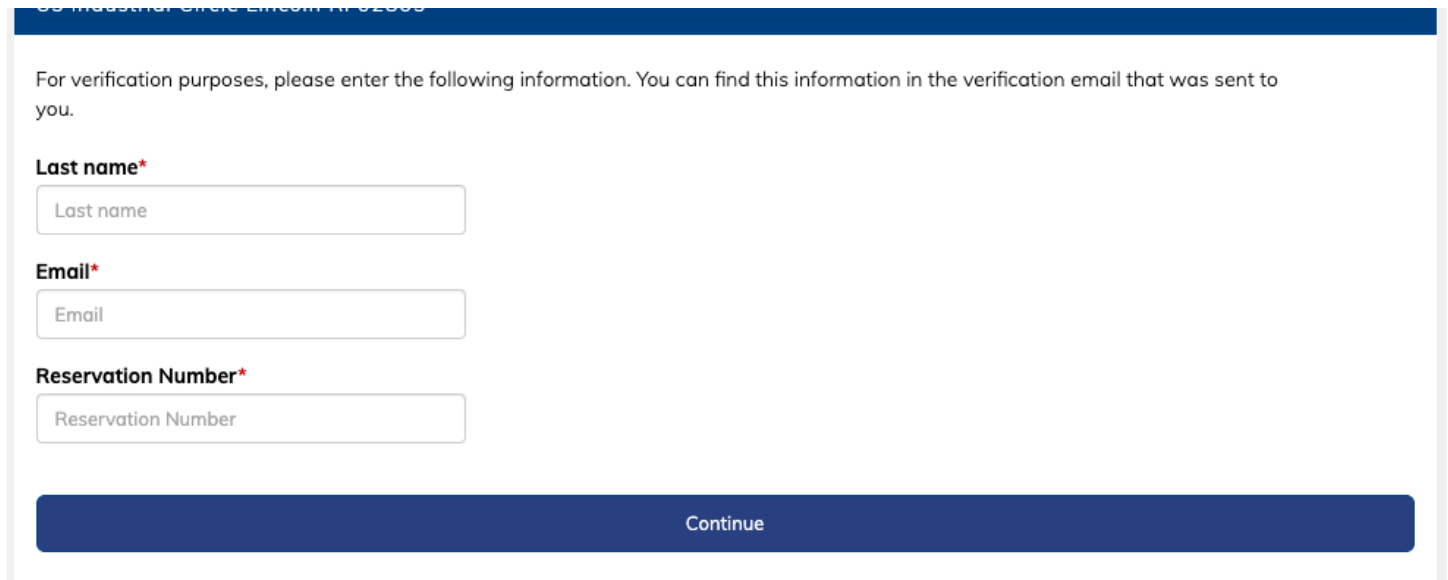
The screenshot shows the 'Send an Email' dialog box. It has fields for 'Name' (Bob Gorsica), 'Email' (Bob@Gorsica.com), 'CC:', and 'BCC:'. There is a 'Send Email' button. The 'Subject' field contains 'Completing your reservation with Dealership Software LLC test [EWR:R2105;M645]'. The 'Message' field contains the text 'Please follow the link below to UPDATE YOUR PROFILE and expedite the rental process.' followed by a long URL: 'https://online.ewebrenter.com/645/UniversalRVDemo/1/rc/50be1621f904140998dc4699c3e81ae504ca5f11a3e636c19a2b783d7d591e72/985a9e9871c68050f61c6c2bbd01df0c59c4b90f9371804ff238761e1f79ae1'. The URL is circled in red. Below the message field is a table titled 'DOCUMENTS to ATTACH:' with columns for 'DOCUMENTS to ATTACH:' and 'Document Date'. The table has the following rows:

DOCUMENTS to ATTACH:	Document Date
<input checked="" type="checkbox"/> Reservation Request	
<input type="checkbox"/> Actual Charges	
<input type="checkbox"/> Damage	
<input type="checkbox"/> Extra Charges	
<input type="checkbox"/> Payment	
<input type="checkbox"/> Quotation	
<input type="checkbox"/> Rental Contract	
<input checked="" type="checkbox"/> C:\Users\bobbyg\Documents\CONTRACTS\Reservation Form.pdf	9/25/2019
<input type="checkbox"/> C:\Users\bobbyg\Documents\CONTRACTS\Cancellation Policy.pdf	9/25/2019

There is a 'Close' button at the bottom right.

## 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:



For verification purposes, please enter the following information. You can find this information in the verification email that was sent to you.

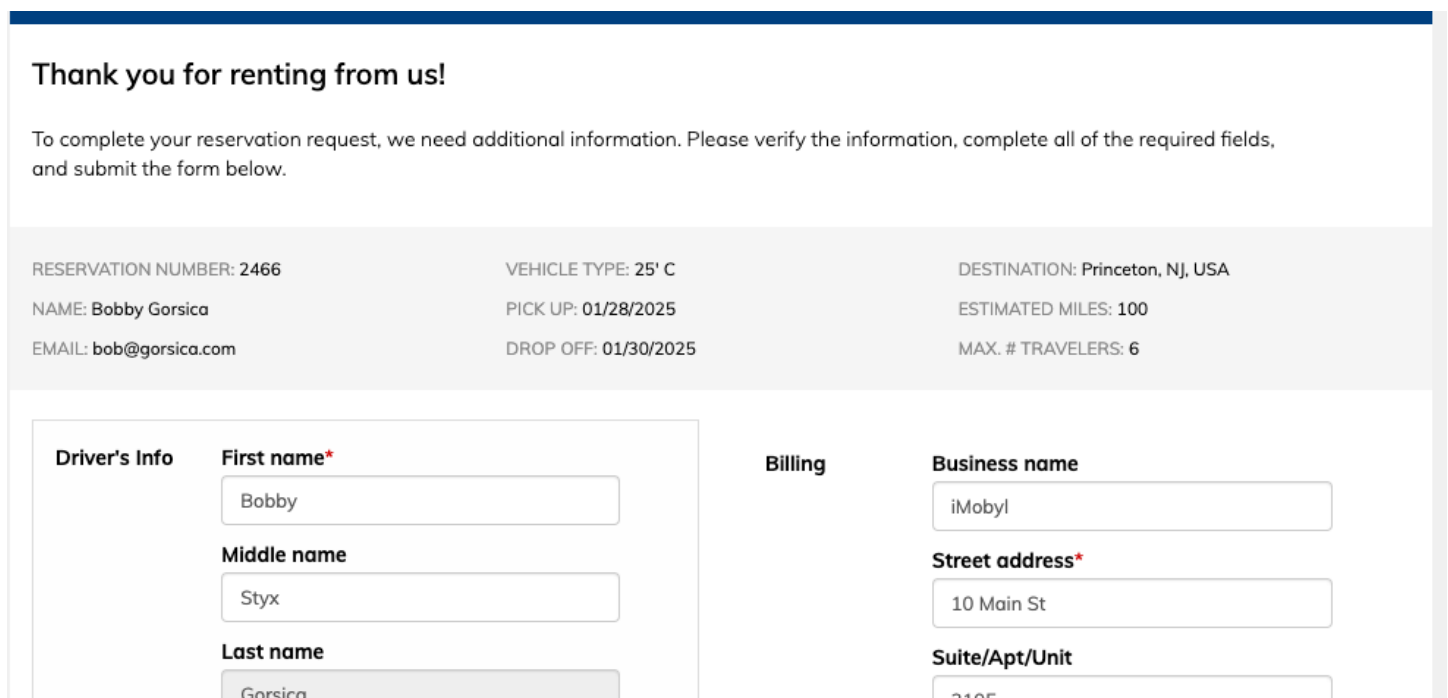
**Last name\***

**Email\***

**Reservation Number\***

**Continue**

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



**Thank you for renting from us!**

To complete your reservation request, we need additional information. Please verify the information, complete all of the required fields, and submit the form below.

RESERVATION NUMBER: 2466	VEHICLE TYPE: 25' C	DESTINATION: Princeton, NJ, USA
NAME: Bobby Gorsica	PICK UP: 01/28/2025	ESTIMATED MILES: 100
EMAIL: bob@gorsica.com	DROP OFF: 01/30/2025	MAX. # TRAVELERS: 6

**Driver's Info**

**First name\***

**Middle name**

**Last name**

**Billing**

**Business name**

**Street address\***

**Suite/Apt/Unit**

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.