



**eWebRenter**

**Release Notes**

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# Introduction

This document contains the release notes for the latest versions of Dealership Software's [EWebRenter](#) application.

There is a separate [set of documents related specifically to the Booking Portal feature](#) of EWebRenter, available in the [Online Basic and Online Pro versions of EWebRenter](#), which allows you to rent your vehicles 24/7 via an online Booking Portal.

# Version 10.56

## New Features

### ADDITIONAL PAYMENT OPTIONS

Home -> Rental Look-Up (select) -> Paymnt Tab -> Check/Credit Dropdown

Added the following payment choices:

- Venmo
- Wire Payment
- Zelle

The screenshot displays the 'Ultimate RV Rentals' software interface. At the top, it shows 'Ultimate RV Rentals' and 'TO: Ultimate RV Rentals'. Below this, there are fields for 'ca, Bobby', 'Online Res. ID: 2532', 'Wait List', and 'Delivery'. Further down, it shows 'rCharger' and 'rolet SuperCharged' with 'Est. Leave On: Tuesday, April 8, 2025 9:0' and 'Est. Return On: Wednesday, April 9, 2025 3:0'. A 'Change Vehicle >' button is visible, along with 'Last status update: 4/2/2025 Booked'. The interface includes several tabs: 'Email Log', 'Vehicle Info', 'Mileage Rates', 'Vehicle Rates', 'Owner', 'Cancel', and 'Drivers'. A 'Generate e-Mail' button is also present. Below these, there are fields for 'Lead:' and 'Lead:'. The 'Paymnt' tab is highlighted with a yellow circle. A dropdown menu is open under the 'Check/Credit' column, listing options: 'Rollover', 'PayPal', 'Credit', 'Refund', 'Outdoorsy Pay', 'RVshare Pay', 'Venmo', 'Wire Payment', and 'Zelle'. The 'Paymnt' tab and the dropdown menu are also circled in yellow. At the bottom, there are buttons for 'Fax Cover', 'Check Out Form', 'Print Cancel Policy', and 'Print Q'.

## EXPAND VEHICLE DETAILS

Vehicles -> **Vehicle** -> **Find Vehicle (select)** -> **Vehicle Tab**

Added the following optional vehicle details to help keep this information easily found:

**Note:** Using the reference [RV and Vehicle Weight Definitions](#)

- Storage Capacity CuFt: The storage capacity of the vehicle measured in cubic feet.
- Towing Capacity Lbs: The towing capacity of the vehicle, if applicable, in pounds.
- Cargo Carrying Cap. Lbs: The Cargo carrying capacity in pounds.
- Electrical Service Amps: The electrical service capacity in Amperes.
- Fuel Capacity Gal: The fuel tank(s) capacity in gallons.

### Vehicle Information

<b>Vehicle Number</b>	Stan Van	<b>Location</b>	Ultimate RV Rentals	<input checked="" type="checkbox"/> Is Active					
<b>Vehicle</b>	Owner Info	ORP Details	Leasing Revenue	Service	Sell / Remove	Email	Amenities	Booking Portal	Notes
Vehicle Number	Stan Van	Rental Program Member	<input checked="" type="checkbox"/>						
Make	Damon	LP Gal	40	Street Value	\$0.00				
Year	2025	Fresh Water Gal	20	Ext Warranty	\$0.00				
Class ID	PassVan-14	Grey Water Gal	20	Received from Buyer	\$0.00				
Start Date	1/1/2025	Black Water Gal	30	Purchase Date					
Odometer	5	Storage Capacity CuFt	100	Selling Price	\$0.00				
Down Payt. Due	4 Days	Towing Capacity Lbs	1,000	Ins Excrow	\$0.00				
Lic#Plate	StanMan	Cargo Carrying Cap. Lbs	2,000	Loan Pay Off	\$0.00				
Expiration Date	1/31/2030	Electrical Service Amps	200	Fix Up Exp	\$0.00				
Vin #	VN1724453976HG65	Fuel Capacity Gal	50	Commission	\$0.00				
Chassis #	C1029384756	Custom Vehicle Email Tag (up to 255 characters):	The vehicle you are renting can be found at: <a href="https://online2.ewebrenter.com/645/universalrvdemo/1/60">https://online2.ewebrenter.com/645/universalrvdemo/1/60</a>			Choice Catagory	1		
GVWR	8000			Decal#					
Awning	No			Hitch Key #					
Bed	N/A			Website Vehicle ID	0				
Seat Belts	10			Program Vehicle ID	60				
Sleeps	2			Vehicle Class X-Ref					
Height Ft.	9			Monthly Storage Fee	\$50.00				
				Default Free Miles - Rental	0				
				Default Special Miles Rate	\$0.00				
				Quoter	<input type="checkbox"/>				
				Passenger Van	Passenger Van1460				

**Please fill in all applicable fields.**

**Note:** If you have the Booking Portal, then if these values are non-zero, they will appear there as well. This is useful information for customers.

## EXPAND VEHICLE AMENITIES

Vehicles -> **Vehicle** -> **Find Vehicle (select)** -> **Amenities Tab**

Added several modern amenities from which to choose, such as Apple Carplay, Interior LED lighting and Wifi Hotspot. Also, added these amenities for several classes of vehicles that did not previously have them.

Vehicle Number: SuperCharger Location: Ultimate RV Rentals  Is Active

Vehicle Owner Info ORP Details Leasing Revenue Service Sell / Remove Email **Amenities** Booking Portal Notes

Fleet Amenties	Vehicle Amenties
Interior LED Lighting	Android Auto
Inverter	Apple Carplay
King Bed/s	Backup Camera
Kitchen Sink	Bunk Bed/s
Leveling Blocks	Cab-Over Bed
LP Connection	Fire Extinguisher
Microwave	Induction Cooktop
Microwave (Convection)	Interior LED Lighting
Navigation	Navigation
Oven (Electric)	Rear Vision Camera
Queen Bed/s	Solar Charging
Range (Electric)	Tankless Water Heater
Range (Gas)	Tri-Fold Sofa
Rear Vision Camera	USB Charging Port
Refrigerator	Wet Bath
Satellite Dish	Wifi
Satellite Radio	Wifi Hotspot
Satellite Reciever	Wireless Phone Charger
Shower	
SiriusXM Radio	
Slide Out/s	
Sofa Sleeper	
Solar Charging	
Tankless Water Heater	
Television/s	
Toilet	
Tow Hitch	
Tow Hitch for Bike Rack	
Tri-Fold Sofa	
USB Charging Port	
Washer/Dryer	
Water Filter	
Wet Bath	
Wifi	
Wifi Hotspot	
Wireless Phone Charger	

## CUSTOM VEHICLE EMAIL TAG

Vehicles -> **Vehicle** -> **Find Vehicle (select)** -> **Vehicle Tab**

Added a section for a vehicle-specific tag that can be used when generating email in EWebRenter. The content entered in the textbox – up to 256 characters – will be displayed after generating your email when the template tag **[[CustomVehicleEmailTag]]** is used. For example, it can contain a link to that vehicle on your own website, as well as any other vehicle-specific information you may want to convey.

### Vehicle Information

Vehicle Number: Stan Van Location: Ultimate RV Rentals  Is Active

Vehicle Owner Info ORP Details Leasing Revenue Service Sell / Remove Email Amenities Booking Portal Notes

Vehicle Number: Stan Van Rental Program Member

Make	Damon	LP Gal	40	Street Value	\$0.00
Year	2025	Fresh Water Gal	20	Ext Warranty	\$0.00
Class ID	PassVan-14	Grey Water Gal	20	Received from Buyer	\$0.00
Start Date	1/1/2025	Black Water Gal	30	Purchase Date	
Odometer	5	Storage Capacity CuFt	100	Selling Price	\$0.00
Down Payt. Due	4 Days	Towing Capacity Lbs	1,000	Ins Excrow	\$0.00
Lic#Plate	StanMan	Cargo Carrying Cap. Lbs	2,000	Loan Pay Off	\$0.00
Expiration Date	1/31/2030	Electrical Service Amps	200	Fix Up Exp	\$0.00
Vin #	VN1724453976HG65	Fuel Capacity Gal	50	Commission	\$0.00
Chassis #	C1029384756			Choice Category	1
GVWR	8000			Decal#	
Awning	No			Hitch Key #	
Bed	N/A			Website Vehicle ID	0
Seat Belts	10			Program Vehicle ID	60
Sleeps	2			Vehicle Class X-Ref	
Height Ft.	9			Monthly Storage Fee	\$50.00
				Default Free Miles - Rental	0
				Default Special Miles Rate	\$0.00
				Quoter	<input type="checkbox"/>

Custom Vehicle Email Tag (up to 255 characters):

The vehicle you are renting can be found at:  
<https://online2.ewebrenter.com/645/universalrldemo/1/60>

Passenger Van Passenger Van1460

Please fill in all applicable fields.

Adding this tag to your email templates is done via **Admin -> eMail -> Find Templates (select)**, and then adding the tag wherever you want the text to appear – for example:

### Email Message

Link: Does Not Include Link to Customer Registration Form  Is Active  Is Automatic

Subject: [[CompanyName]] - RV Rental Quote Follow Up or what ever Type: Quotation

CC: BCC:

Text:

Hello [[FirstName]],

I hope you are doing well and your trip planning is coming along. I looked over your paperwork and it seems that we have not finished. If there is anything that I can do or answer please let me know; and if you need help picking out a different RV or trailer, we still may have some available for your dates.

I am really looking forward to helping you make this trip as nice and easy as possible.

I am just trying to see if this changes

Staff

[[CompanyName]]  
 [[Address\_Addr1]]  
 [[Address\_City]] [[Address\_State]] [[Address\_PostalCode]]  
 Work: [[Phone]]  
 Fax: [[Fax]]  
 GVWR:K[[RCID]]  
 Vehicle Note: [[CustomVehicleEmailTag]]

Find Delete Copy Cancel Save Save/Close

Then on the Rental Form, once you select the template and generate the email, the text will be displayed:

The screenshot shows the 'Rental Form' interface. At the top, it displays 'FROM: Ultimate RV Rentals' and 'TO: Ultimate RV Rentals'. The 'Book Date' is set to a date in a yellow box, with a 'Book It' button. Below this, the user 'Gordon, Bob' is listed with 'Res. ID: 2529'. The vehicle is identified as 'Stan Van' and 'Damon PassVan-14'. The estimated leave and return dates are 'Tuesday, April 1, 2025' and 'Thursday, April 3, 2025' respectively. A 'Change Vehicle' button is visible. The 'Message' field contains the following text: 'Lincoln RI, 02865', 'Work: 401-305-3740', 'Fax: 401-305-3746', 'EWR:R2529', and 'Vehicle Note: The vehicle you are renting can be found at: <https://online2.ewebrenter.com/645/universalrvdemo/1/60>'. This entire message block is circled in yellow. The interface also includes a 'Send an Email' section with fields for Name (Bob Gordon), Email (bob\_elena@gorsica.com), and a 'Generate e-Mail' button.

### SUPPORT RV CLASS TYPE: PASSENGER VAN

Vehicles -> Class / Pricing -> Add Class (select) -> Class Details Tab

Support has been added for an RV Class of "Passenger Van". This is an additional popular RV Class that can be used to distinguish this type of vehicle from, say, a Class B vehicle. For Booking Portal users, the Passenger Van will be a separately selectable vehicle type.

The screenshot shows the 'Vehicle Class Information' form with the 'Class Details' tab selected. The 'Class' dropdown menu is set to 'Passenger Van' and is circled in yellow. Other fields include 'Rental Contract' (set to a yellow box), 'Vehicle Category' (set to a yellow box), '(Friendly) Class ID' (empty), 'Length (in feet)' (empty), 'Prep Fee' (\$175.00), 'Cleaning Fee' (\$50.00), 'Security Deposit' (\$800.00), 'Website Deposit' (0), 'Cancellation Charge' (\$0.00), 'QuickBook Item' (empty), 'Program Class Length' (Passenger Van), and 'Program Class ID' (0). The 'Sales Tax' section includes 'Tax Method' (empty), 'Sales Tax' (0.07), 'Sales Tax (Level 2)' (5), 'Tax Level 2 Effective Above' (\$0.00), and 'Use Tax' (\$0.00).

## BOOKING PORTAL: DISPLAY MILEAGE AS A LINE ITEM

Admin -> **Company** -> **Customer Portal / Booking Portal** -> **Booking Portal Tab**

By default, the Booking Portal will display all pricing with any mileage included in the price the cost of mileage was hidden from customers. (The intent was to also hide pricing from other dealerships.). Some dealerships, however, may want to display the mileage as a separate line item from the daily rental rate. By selecting this preference, the mileage cost is displayed separately but still included in the total price.

The screenshot shows a web application window titled "Customer Portal / Booking Portal" with a close button in the top right corner. The interface has a tabbed menu at the top with four tabs: "Online Basics", "Customer Portal: Basic", "Booking Portal", and "BP: Check Out Form". The "Booking Portal" tab is currently selected. Below the tabs, there are several configuration sections:

- Booking Portal / Coppermine Credentials:** Includes fields for "Company Portal ID" (645), "Company Full Name" (UniversalRVDemo), "Coppermine User Name" (URVD1), and "Temporary Coppermine Password" (Changeme1234). A note indicates the password is the default for initial log-on.
- Portal Banners:** Includes fields for "Company Banner Header" (Welcome to Universal RV!), "and Subheader Text" (Select your location), "Location Banner Header" (Select your dates and RV), and "and Subheader Text" (More text here). It also has dropdown menus for "Banner Text Position" (Bottom) and "Banner Overlay Position" (Left).
- Heartland Credit Card Keys:** Includes fields for "Public Key" and "Secret Key", both containing asterisks.
- Google Analytics:** Includes a "Tracking Code" field with the value "UA-139725727-1".
- Preferences:** This section is circled in yellow and contains a checkbox labeled "Display Mileage As Line Item" which is checked.

At the bottom right of the window, there is a "Save / Close" button.

# General Improvements/Fixes

## RENTAL FORM: SPECIALS TAB CALCULATIONS

Home -> Rental Look-Up (select) -> Specials Tab

General re-organization of this tab was done to enhance usability.

When there were certain specials selected/modified, such as the “Special Prep” fee, and the Vehicle was changed, the selection/modification was still shown, but the Estimate details did not include the special fees, and it wasn’t clear what to do. In this release, when the vehicle is changed, the Special selection/modification remains, and is applied to the newly selected vehicle.

In addition, it was unclear what “0.00” meant for some fields – was it “use the value configured for the class” or “Override the configured value and use \$0.00”. In this release, a checkbox and graying are used to make it more clear which value is to be used.

FROM: Ultimate RV Rentals TO: Ultimate RV Rentals Book Date:

Gorczyca, Robert Res. ID: 2550 Wait List  Delivery  Calendar

Daze Off Est. Leave On: Wednesday, May 14, 2025 9:00 AM

Coachman C 26 Est. Return On: Friday, May 16, 2025 3:00 PM

< Change Vehicle > Last status update: 04/27/2025 Return on date changed...

Email Email Log Vehicle Info Mileage Rates Vehicle Rates Owner Cancel Drivers Contract Recv'd

Type:  Generate e-Mail Customer Info

Subject:  Chg. Customer

Link:  Res. Req.

Agent:  Lead:  New Quote

Cancelled

Destination	Equipment	Insurance	Paymnt	Credits	Special	OUT	IN	Extras/Taxed	Extras/No Tax	Expense	Refund
Single Select					Special Daily Rate:	\$0.00		Rental Days:	0		
Owner's Personal Use:	<input type="checkbox"/>				Spec. Base Rental Total	\$0.00		Free Miles - Per Rental:	0		
Owner/Owner Rental:	<input type="checkbox"/>				Special Cleaning	<input checked="" type="checkbox"/> \$0.00		Free Miles - Per Day:	0		
No Charge Rental:	<input type="checkbox"/>				Special Prep	<input checked="" type="checkbox"/> \$50.00		Special Miles Rate	<input type="checkbox"/> \$0.00		
RV Service / Sold:	<input type="checkbox"/>				Spec. Security Deposit:	<input type="checkbox"/> \$0.00		Spec. X Miles:	<input checked="" type="checkbox"/> \$0.00		
					Spec. Generator Fee:	<input type="checkbox"/> \$0.00		Charge for Unused Estimated Miles:	<input type="checkbox"/>		
Tax Exempt:	<input type="checkbox"/>				Free Day?	<input type="checkbox"/>		Special Rental Total:	\$0.00	<input type="button" value="X"/>	
Exemption #:	<input type="text"/>										

Estimated Miles Cost

70.00	150.00	300.00	=	\$520.00
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Optional Equipment Total: \$0.00

Collision Damage Waiver: \$0.00

Extras Total: \$0.00

Rental Total: \$1,128.00

Sales Tax: \$70.50

Rental Total w Tax: \$1,198.50

Security Deposit: \$800.00

Rental Total w Deposit: \$1,998.50

Payments Total: \$0.00

BALANCE: \$1,998.50

Revenue Per Mile: \$1.41

Days Until: 17

## LOCATION-BASED HEARTLAND PAYMENT SYSTEM API KEYS

Prior to this version, a single, company-wide Heartland Payment Systems payment processing account was supported. This feature allows a separate account on a per-location basis, which may be helpful for companies with multiple locations. A location can now have its own account or use the default company account. Contact Dealership Software for more information.

# Version 10.52

## New Features

### RENTAL FORM IMPROVEMENTS

Home -> **Rental Look-Up (Select)**

A number of improvements was made to the Rental Form, including many pixel-pushing changes to better align fields/buttons/boxes and improve consistency among the sub-forms. Some button actions now display more explanatory text. A few of the changes are given below as an example:

The screenshot shows the Rental Form interface with several key areas highlighted by numbered callouts (1-5):

- 1:** A button labeled "< Change Vehicle >" is highlighted.
- 2:** A text field labeled "Last status update: 04/25/2023 Quote Created" is highlighted.
- 3:** The "Est. Leave On:" field, showing "Monday, May 1, 2023 2:00 PM", is highlighted.
- 4:** The "Estimated Miles Cost" table is highlighted.
- 5:** The "Estimate Details" panel on the right side of the form is highlighted.

Destination ID	Destination	Est. Miles	Adults	Children	Pets
Add		0	0	0	0

Estimate Details	Final Details	Notes	Rates
by Night	Nights:	4	
Average Nightly Rate:		\$660.00	
Base Rental Cost:		\$2,640.00	
(Credit) or Increase Total:		\$0.00	
Base Rental Sub Total:		\$2,640.00	
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	
Extras Total:		\$0.00	
<b>Rental Total:</b>		<b>\$2,865.00</b>	
Sales Tax:		\$200.55	
<b>Rental Total w Tax:</b>		<b>\$3,065.55</b>	
Security Deposit:		\$2,500.00	
Rental Total w Deposit:		\$5,565.55	
Payments Total:		\$0.00	
<b>BALANCE:</b>		<b>\$5,565.55</b>	
Revenue Per Mile		\$0.00	
Days Until:		6	

1. The "Select New Vehicle" button was reduced in size and re-labelled "Change Vehicle".
2. A new "status update" field is displayed which shows the most recent status change. The status is linked directly to the entries in the Notes tab on the right side of the form. A small number of common status updates is automatic, such as when the "Book It" button is pressed.
3. The time, as well as the date, is displayed in this area.
4. The dollar values are all right-aligned, making it easier to account for each amount. Also, the 'Estimate Details' and "Final Details" panels are more in-sync with their values throughout the rental process.
5. Fields which are editable are more consistently displayed with a white background, while read-only fields are in light gray and are not clickable.

## CHECK AVAILABILITY FORM IMPROVEMENTS

Home -> **Check Availability**

Once dates are selected the Check Availability form now automatically updates the search results as you select vehicle classes, select locations, change dates, etc.

Availability
✕

Select Dates:   Select Location:

Select Class:

Estimated Mileage:   Optional

Vehicles NOT Available:

Price Inc. Tax:

Class	Stock #	Year	Make/Model	Awning	Bed	Sleeps	Seat Belts	Weeks	Odometer	In/Out	Price Inc. Tax *
<input type="button" value="Select"/> C	Portia	2012	Shasta C 31		-1 Queen	6	8	74.43	39000		\$2,100.56
<input type="button" value="Select"/> C	Fun Times	2012	Fleetwood C 31		-1 Queen	6	8	32.86	9502		\$2,100.56
<input type="button" value="Select"/> C	Double Daze	2012	Coachman C 31		-1 Queen	6	8	25.86	11500		\$2,100.56
<input type="button" value="Select"/> C	In A Daze	2012	Coachman C 31		-1 Queen	8	8	25.29	21160		\$2,100.56
<input type="button" value="Select"/> C	Daze Off	2012	Coachman C 26		-1 Queen	6	8	41.43	24452		\$1,858.31

Price Includes Insurance

## LOCATION CALENDAR IMPROVEMENTS

Admin -> Locations/Contracts -> Find Location -> **Calendar**

The Calendar tab, formerly only for Booking Portal users, is now available on the Location panel. This is where you define a particular location's Open/Close schedule, Holidays, etc. The Admin -> Preferences -> Defaults -> Holidays option has been removed.

Location Information

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

Monday:  Open  Closed  Closed/Available for Drop Off  
Tuesday:  Open  Closed  Closed/Available for Drop Off  
Wednesday:  Open  Closed  Closed/Available for Drop Off  
Thursday:  Open  Closed  Closed/Available for Drop Off  
Friday:  Open  Closed  Closed/Available for Drop Off  
Saturday:  Open  Closed  Closed/Available for Drop Off  
Sunday:  Open  Closed  Closed/Available for Drop Off

Early Return Fee

Exceptions to "Closed/Available for Drop Off" on above list:

Date Closed / Not Available for Drop Off	
Sunday, February 12, 2023	<input type="checkbox"/>
Sunday, April 16, 2023	<input type="checkbox"/>
*	<input type="checkbox"/>

Holidays	Return Policy	Fee
5/30/2022	No Return	
11/24/2022	No Return	
12/25/2022	No Return	
1/1/2023	Accept Returns	
1/2/2023	Accept Returns	
1/3/2023	No Return	
2/20/2023	Accept Returns	\$20.00
5/29/2023	No Return	
7/4/2023	No Return	
10/9/2023	No Return	
11/10/2023	Accept Returns	
11/23/2023	No Return	
12/25/2023	No Return	
1/1/2024	No Return	
1/2/2024	No Return	
*		

Record: 1 of 15 No Filter Search

**Copy Holidays to Another Location**

To Location(s): All Locations

Include Policy/Fee:

Record: 1 of 2 No Filter Search

Ultimate RV Rentals

For multi-location users, there is a new "Copy Holidays to Another Location" widget, which allows you to also include any Policies/Fees. For example, you can create all the holidays for a year at one location, copy them to all other locations, then go to a specific location to add/edit/delete as necessary. Also, holidays older than ~1.5 years are automatically removed.

**Note:** If a holiday date already exists at the other location, then copying that entry will have no effect UNLESS you select "Include Policy/Fee", in which case it WILL over-ride the existing entry.

**Hint:** To Delete a holiday, select the date of interest, delete the date, then Save.

## LINK TO RELEASE NOTES

### Dashboard

To quickly open these Release Notes, you can at any time click on the “Version #, Date” underlined link at the bottom of the Dashboard. The online Release Notes should then appear in your default browser.

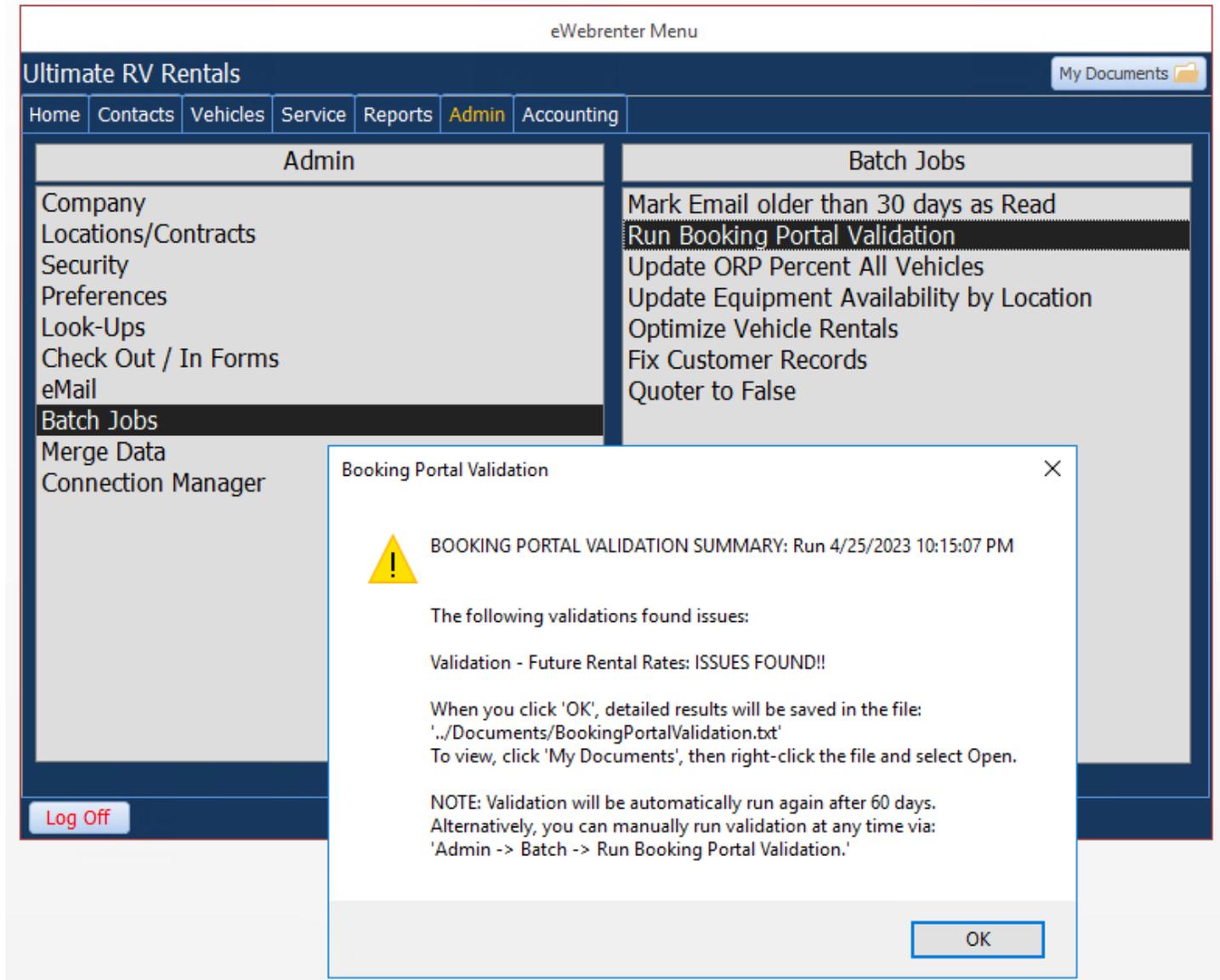
The screenshot displays the eWebrenter Dashboard interface. At the top, it says "eWebrenter Menu" and "Ultimate RV Rentals". A navigation bar includes links for Home, Contacts, Vehicles, Service, Reports, Admin, and Accounting. The main dashboard area features ten icons for different functions: Check Availability, Rental Calendar, Make A Reservation, Rental Look-Up, Customers, Quotes (with a '3' notification), Assigned, Un-Assigned, In-Out Reports, and Set-Up. Below the icons is an "Open Res#:" input field. At the bottom left is a "Log Off" button. At the bottom center, the text "Version 10.52 4/29/2023" is underlined and highlighted with a yellow circle. To its right, it says "User: bobbyg". A refresh icon is located in the bottom right corner.

## BOOKING PORTAL VALIDATION (REQUIRES THE BOOKING PORTAL PACKAGE)

Admin -> Batch Jobs -> **Run Booking Portal Validation**

A set of validation methods for Booking Portal users has been developed. The intent is to help you determine if there are any common configuration issues, missing information, etc. You can manually run the validation suite whenever you like. It is especially helpful as you're initially configuring the Portal.

In addition, the suite is run in the background every ~60 days, and will display a message if any issues are found. For example, one of the most common issues is that Rental Rates for a Class are not configured for up to a year out. One of the validation methods will issue a warning if Rental Rates are not configured for at least 14 months ahead of time, giving you ample time to address the issue.



The screenshot displays the eWebrenter Menu interface. The main menu is titled "Ultimate RV Rentals" and includes a "My Documents" icon. The "Admin" tab is selected, and the "Batch Jobs" sub-menu is open, showing the "Run Booking Portal Validation" option highlighted. A dialog box titled "Booking Portal Validation" is overlaid on the screen, containing a yellow warning icon and the following text:

**BOOKING PORTAL VALIDATION SUMMARY: Run 4/25/2023 10:15:07 PM**

The following validations found issues:

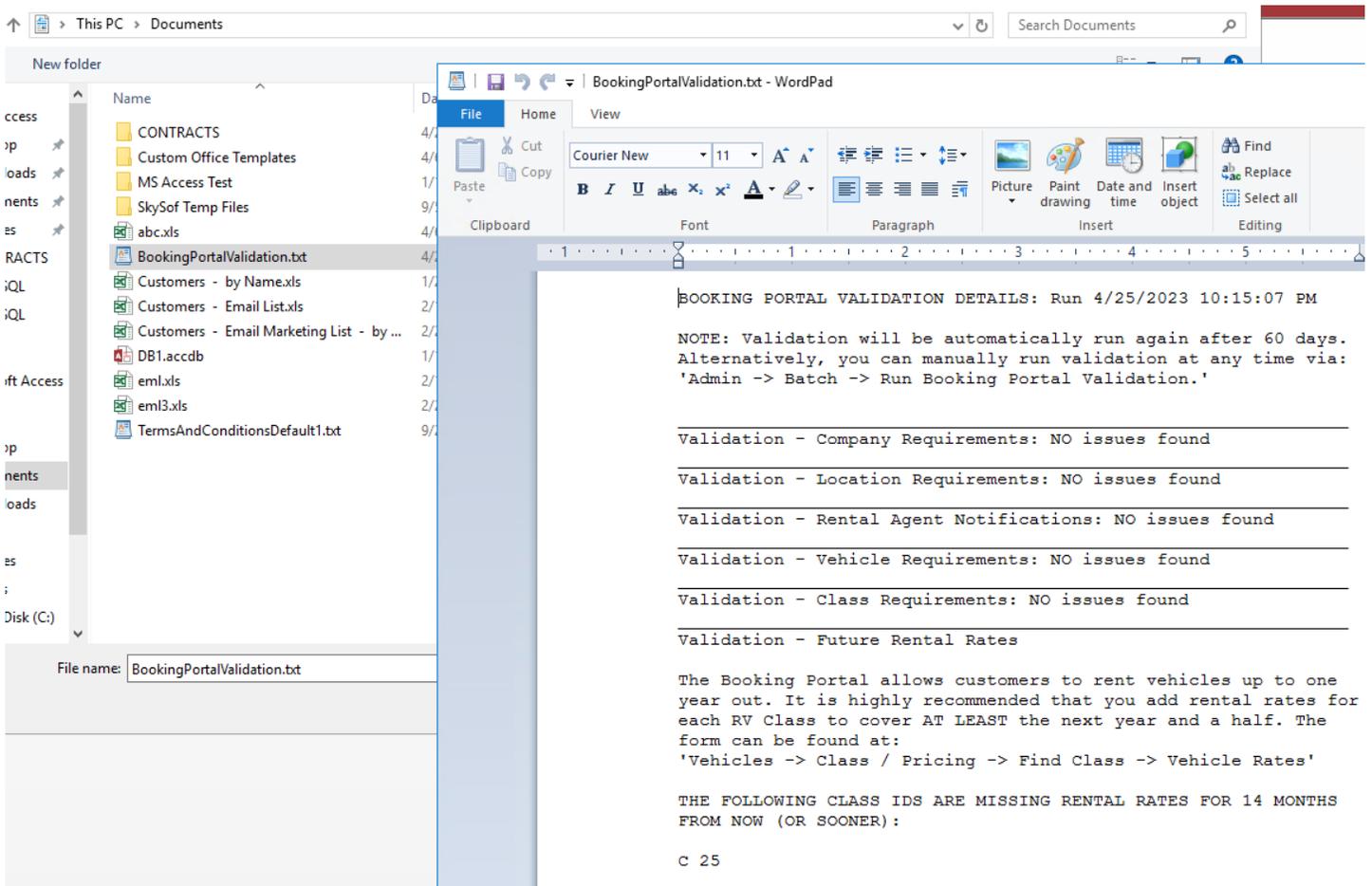
Validation - Future Rental Rates: ISSUES FOUND!!

When you click 'OK', detailed results will be saved in the file:  
'../Documents/BookingPortalValidation.txt'  
To view, click 'My Documents', then right-click the file and select Open.

NOTE: Validation will be automatically run again after 60 days.  
Alternatively, you can manually run validation at any time via:  
'Admin -> Batch -> Run Booking Portal Validation.'

An "OK" button is located at the bottom right of the dialog box.

Above is an example of the message that appears when the validation is run manually. In this case, the "Future Rental Rates" validation found an issue. Only a summary of issues is displayed here. A detailed report is saved in your Documents folder, in a file named "BookingPortalValidtion.txt", which you can access as per the above message. The document is replaced every time validation is run.

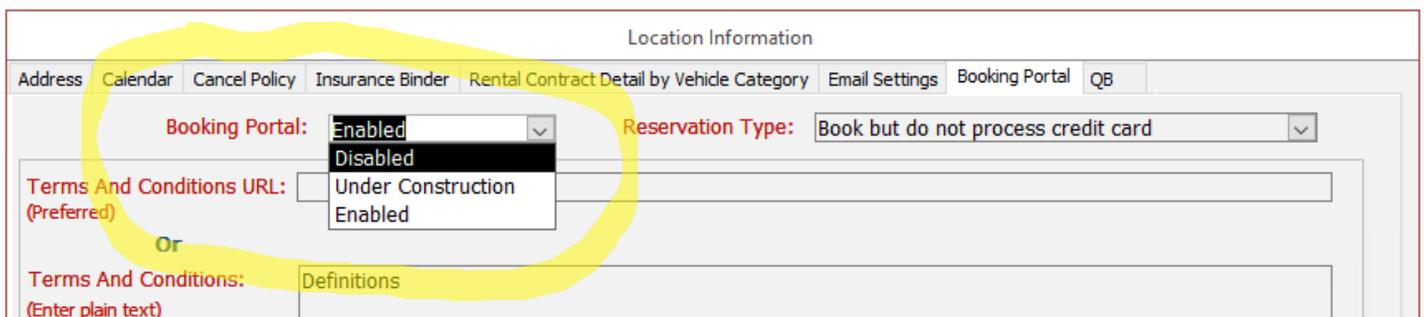


In the above example of the detailed text document, a number of validations were performed to cover the most frequent/serious issues. In this case, the Future Rental Rates validation displays that the vehicle class “C 25” is missing rental rates for 14 months from now (perhaps even sooner), as well as a note on how to access the pertinent form to correct the issue.

### BOOKING PORTAL STATUS (REQUIRES THE BOOKING PORTAL PACKAGE)

Admin -> Locations/Contracts -> Find Location -> **Booking Portal**

For each location, you can now change the state of the Booking Portal. This is especially useful if you are doing initial setup, some maintenance, or have multiple locations, but only rent online at a subset of them.



- Enabled: The Booking Portal for the location is visible to online customers
- Under Construction: The Booking Portal for the location displays an “Under Construction” banner
- Disabled: The Booking Portal for the location is not visible

**Note:** Available by TBD

# General Improvements/Fixes

## RENTAL CONTRACT VEHICLE CATEGORIES

Admin -> Look-Ups -> **Rental Contract Vehicle Categories**

**Note:** Formerly “Rental Categories”

Typically, a group of vehicle classes can all be covered under a single rental contract. Depending on your business style, you can make a general rental contract to cover many vehicle classes, or separate, more detailed contracts specific to individual vehicle classes. In either case, a Rental Contract Vehicle Category is what links a vehicle class to a specific rental contract at a location.

The Vehicle Categories for Rental Contracts form outlines the steps you would typically take to associate a vehicle and it’s class with a location and rental contract, by first creating a suitable category with your choice of name and description, such as “ATV” for a rental contract that covers all vehicles in the ATV class. Then follow Steps 1 – 3 to complete the process.

**Note:** A given Location can have only one Rental Contract for a given Vehicle Category. E.g., if you had two dissimilar ATV Classes at a location requiring different contracts, you would create two different Vehicle Categories, one for each ATV class.

**Note:** A given Vehicle Category can be used at multiple locations; at each location you should create a rental contract for that vehicle category, assuming there are appropriate vehicles at the location.

The screenshot shows the eWebrenter Menu interface. The 'Admin' tab is selected, and the 'Look-Ups' sub-menu is open, highlighting 'Rental Contract Vehicle Categories'. A pop-up window titled 'Vehicle Categories for Rental Contracts' is displayed, providing instructions and a table of existing categories.

**Vehicle Categories for Rental Contracts**

**A Vehicle Category links a set of vehicles to a Rental Contract at a given Location. Once a unique Vehicle Category is created, you may then:**

1. Create/Modify one or more Vehicle Classes to use that Vehicle Category
2. Create/Modify one or more Vehicles to use the corresponding Vehicle Class
3. Select a Location/Contract to define the Rental Contract Details for the Vehicle Category at that Location

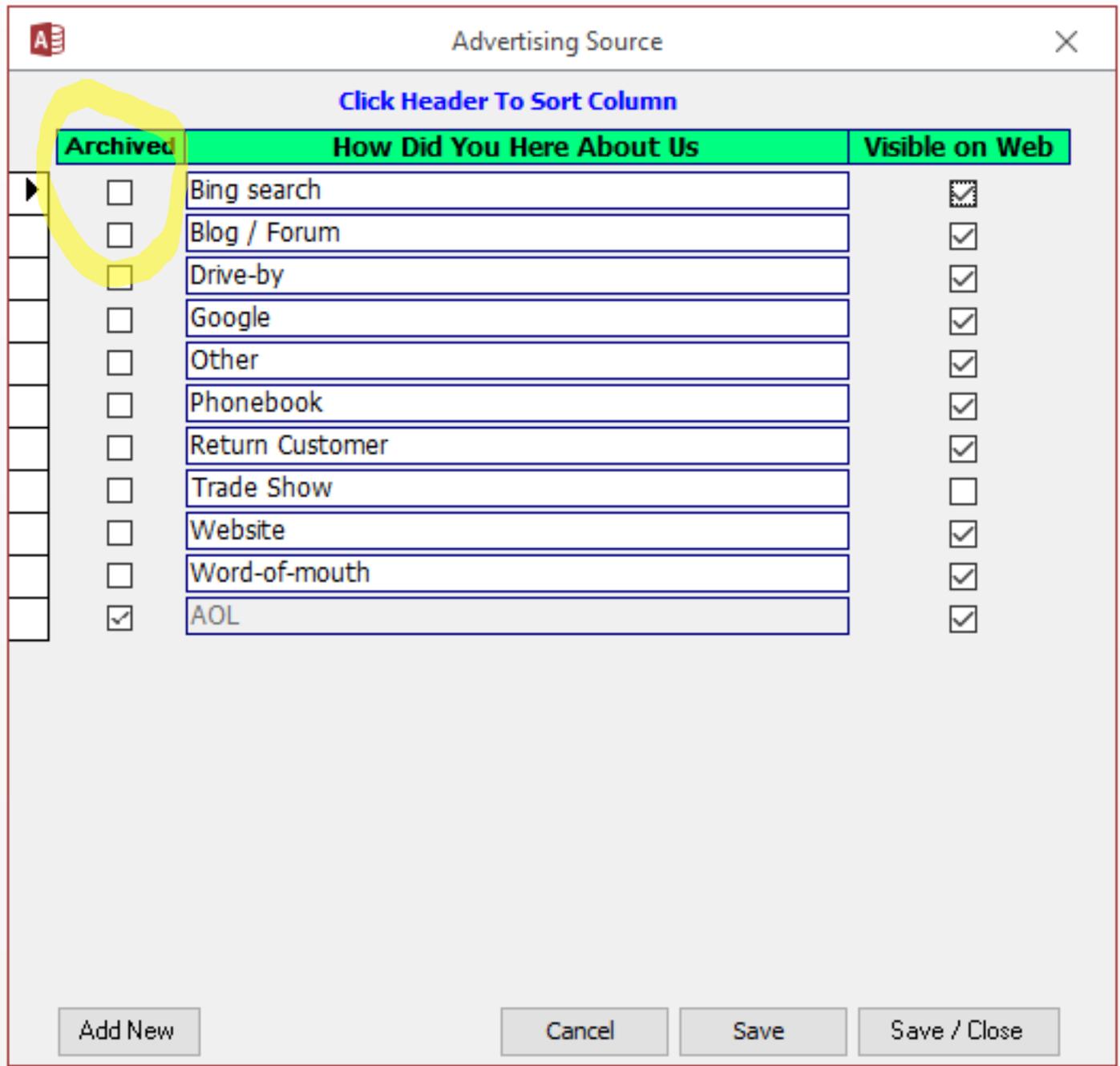
**It is recommended that you do NOT modify existing Vehicle Categories**

Vehicle Category	Description
▶ ATV	All Terrain Vehicle
Bike	Bicycle
Boat	Water Craft
Car	Car Rental

## ADVERTISING SOURCE ARCHIVING

Admin -> Look-Ups -> **Advertising Source**

You can now “archive” an advertising source (rather than deleting it) – it is saved for historical purposes and potential analysis. If it is archived, then it will NOT appear as a selection in EWR or the Booking Portal. You can also unarchive it at any time.



The screenshot shows a window titled "Advertising Source" with a close button (X) in the top right corner. Below the title bar, there is a header area with the text "Click Header To Sort Column". The main content is a table with three columns: "Archived", "How Did You Here About Us", and "Visible on Web". The "Archived" column is highlighted with a yellow circle. The table contains the following data:

Archived	How Did You Here About Us	Visible on Web
<input type="checkbox"/>	Bing search	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Blog / Forum	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Drive-by	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Google	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Other	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Phonebook	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Return Customer	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Trade Show	<input type="checkbox"/>
<input type="checkbox"/>	Website	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Word-of-mouth	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	AOL	<input checked="" type="checkbox"/>

At the bottom of the window, there are four buttons: "Add New", "Cancel", "Save", and "Save / Close".

### **CHANGE OF ADDRESS**

Changing a Location's address did not automatically change its latitude/longitude as used by the Booking Portal. This has been fixed.

### **REPORT TYPOS**

A few reports, such as the Credit Card Authorization report and Extra Items report, has had issues addressed.

### **CUSTOMER SEARCH**

In certain situations, when searching for a customer in a multi-location situation, the customer did not appear. This has been addressed.

## **End of Version 10.52**

# Version 10.51

## New Features

### CUSTOMER EMAIL MARKETING LISTS

Reports -> Contacts -> Customers -> **Customer Email Marketing List**

There are many full-featured email marketing services available (MailChimp, Constant Contact, Zoho Campaigns, etc.). Rather than creating an EWR-specific email marketing program, or integrate with a specific provider, EWR provides an easy way to export to Excel the customer data most often applicable to, and importable into, email marketing programs. Once in Excel, you can do additional data manipulation as necessary (e.g., removing the first row which contains report-related information.)

Follow the above steps to open the *Select Report / Create User Reports* form:

Report Format	Definition Name	Type	
Customer Email List	Customers - Email List - Active	System	Print Preview
Customer Email Marketing List	Customers - Email Marketing List - by Quote Date - Enter Date Range	System	
Customer Email Marketing List	Customers - Email Marketing List - by Return Date - Enter Date Range	System	Print
Customer List	Customers - by Name	System	
Customer Mailing Labels	Customer Mailing Labels - by Quote Date - Enter Date Range	System	Export to Excel
Customer Mailing Labels	Customer Mailing Labels - by Return Date - Enter Date Range	System	
Customer Mailing List	Customers - Mailing List - by Quote Date - Enter Date Range	System	
Customer Mailing List	Customers - Mailing List - by Return Date - Enter Date Range	System	

Edit    Delete    Copy    Rename    Done

There are two Customer Email Marketing List options:

- By Quote Date
- By Return Date

Selecting one will allow you to enter a date range during which a customer was quoted a rental price, or returned their vehicle. For example, suppose you want to create a marketing program for everyone who was quoted a price during the last month. In this case, you would select the *By Quote Date* report, and the appropriate date range. If instead you want to send an offer to everyone who recently rented a vehicle, you would choose the *By Return Date* option. To create a list of all customers that had ever been given a quote, select the *By Quote Date* option, and use an extended date range.

Once you select an option, click the “*Export to Excel*” button. You will be prompted to enter a filename for the Excel file you are about to export, followed by a File Explorer dialog in which you select the folder in which the exported file will be saved, such as *Documents*. Once you select the folder and click the dialog’s *Open* button, a calendar widget will appear. Enter the **start date** of the date range of interest and click “*OK*”. Then do the same for the **end date**. The export should then complete, and you can find your file under the name and folder you chose.

The list of fields related to the customer that are exported are:

***LastName***

***FirstName***

***Company***

***Email***

***Street***

***City***

***State***

***PostalCode***

***Country***

***Mobile***

***BirthDate***

***IsActive***

**Note:** You may, for example, want to use Excel to sort by the *IsActive* field, and remove those customers who are not currently active. Then import/upload the resulting file into your Email Campaign provider’s application.

## **RENTAL CALENDAR/SCHEDULE HEIGHT**

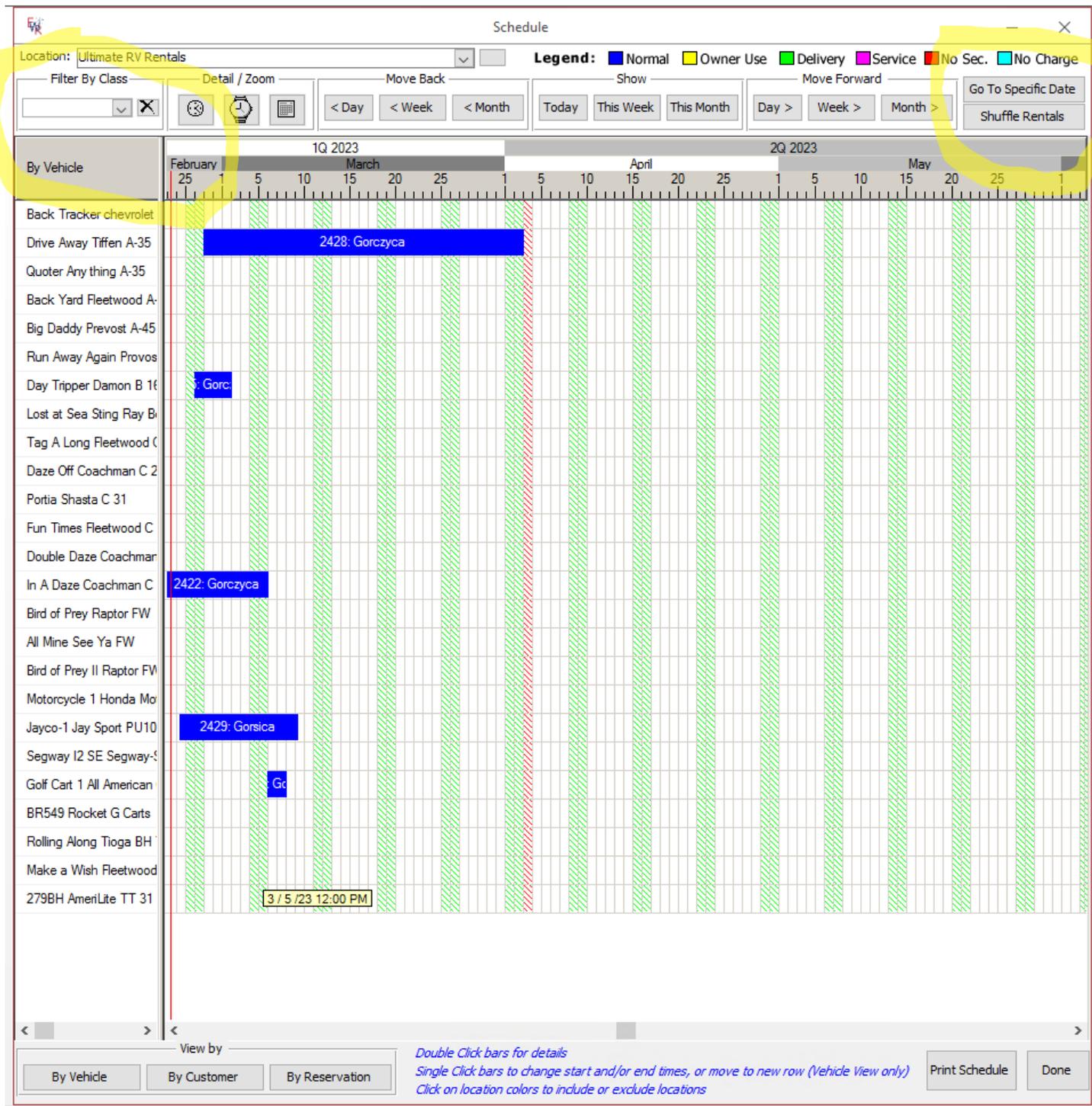
Home -> Rental Calendar

When opening the **Rental Calendar**, such as from the Dashboard, by default the schedule form will now take up the entire height of the MS Access window. (Previously, the schedule form was a fixed height.) Depending on your monitor, etc., this can significantly improve the number of vehicles that can be seen at one time, making it easier or less necessary to scroll if you have many vehicles.

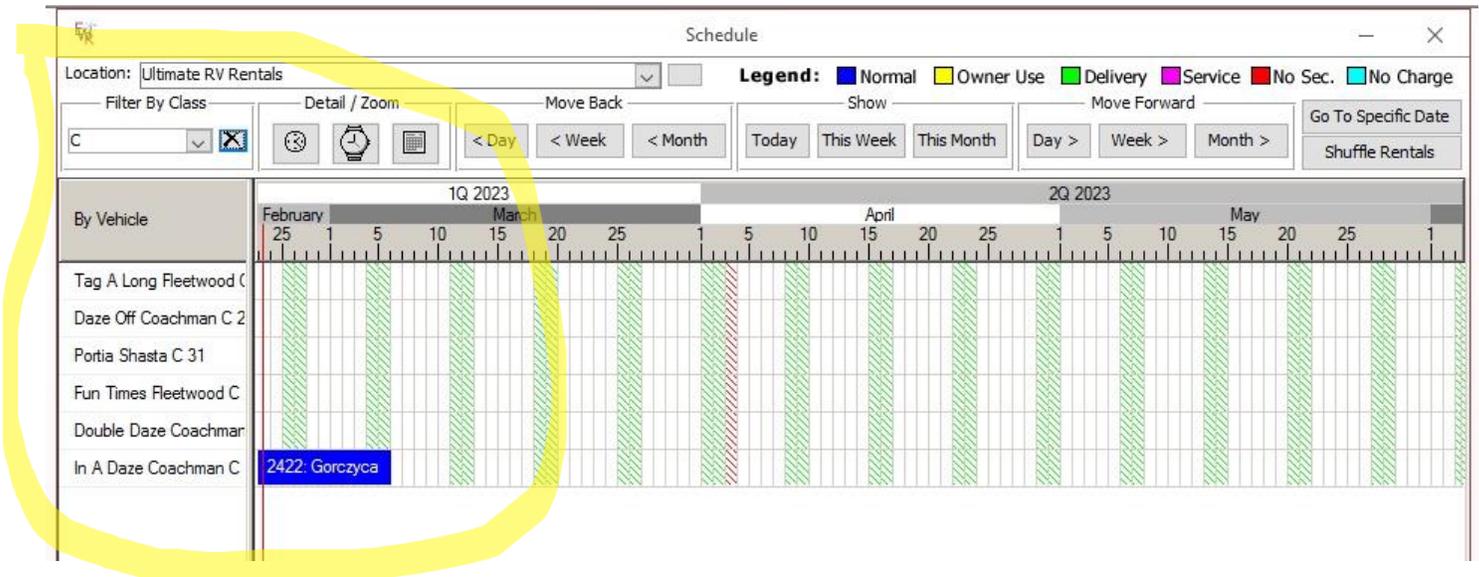
## RENTAL CALENDAR/SCHEDULE “FILTER BY CLASS”

Home -> Rental Calendar

When opening the **Rental Calendar**, the default the View is “By Vehicle”. The “Shuffle Rentals” button has been moved to the right side, and a new “Filter By Class” dropdown has been added on the left side – this can be used for only the “By Vehicle” view.



The dropdown will display classes for all vehicles at the selected location, or if selected, all locations. You can then select one of the available classes (e.g., “C”) and only vehicles of that Class will be displayed in the calendar:



This can be especially helpful if you have many vehicles, but want to see only a subset applicable to a certain rental situation.

## General Improvements/Fixes

### ORP PAYMENTS IMPROVEMENTS

Contacts -> Payments (ORP) -> **Find Payments**

The *Payments to Owner* form has been improved:

- Error checking has been improved
- To edit an existing payment, click the magnifying glass next to the payment. You can no longer edit in-place the payment as this could result in errors.
- Adding a payment now allows you to use a single check to pay for multiple vehicles. Previously, a check could provide payment to only a single vehicle.
- Edits or additions automatically cause a form refresh.
- The most recent payment is now at the top of the list.
- Although you cannot delete a payment, you can set its amount to \$0.00

### ITEMIZED REPORT – FLEET REVENUE

Reports -> Vehicles -> Fleet Equipment -> **Fleet Revenue**

There was an issue when generating the Fleet Revenue report, it would ask you to enter additional information. This has been fixed.

## RENTAL CALENDAR/SCHEDULE: NO SECURITY DEPOSIT COLORATION

Home -> Rental Calendar

When opening the **Rental Calendar**, rentals for which the *Special “No Security Deposit”* checkbox has been ticked now appear as **red**, as per the legend on the calendar. Previously, the “No Security Deposit” setting did not result in an identifying color.

## RENTAL FORM: LEAVE ON / RETURN ON DATE FIELDS IMPROVEMENT

Home -> Rental Look-Up -> Select Rental -> **Rental Form**

Previously, the *Leave On* and *Return On* date fields were too narrow to accommodate the longest dates (e.g., *Wednesday, September 28, 2022*) and would instead display hash marks (###). The fields have been widened.

## ENABLE REMOVING CC/BCC FIELDS FROM EMAIL TEMPLATES

Admin -> eMail -> Find Templates -> Select Template

Previously, if one entered an email address into the CC or BCC field, it persisted, even if you emptied the field and saved the form. You are now able to delete the content of these fields permanently.

## BOOKING PORTAL: ENABLE REMOVING THE TERMS AND CONDITIONS URL

Admin -> Locations/Contracts -> Find Locations/Contracts -> Select Location -> **Booking Portal**

Previously, if one entered a URL in the Terms And Conditions URL field, it persisted, even if you emptied the field and saved the form. You are now able to delete the content of this field permanently.

## End of Version 10.51



# Version 10.50

## New Features

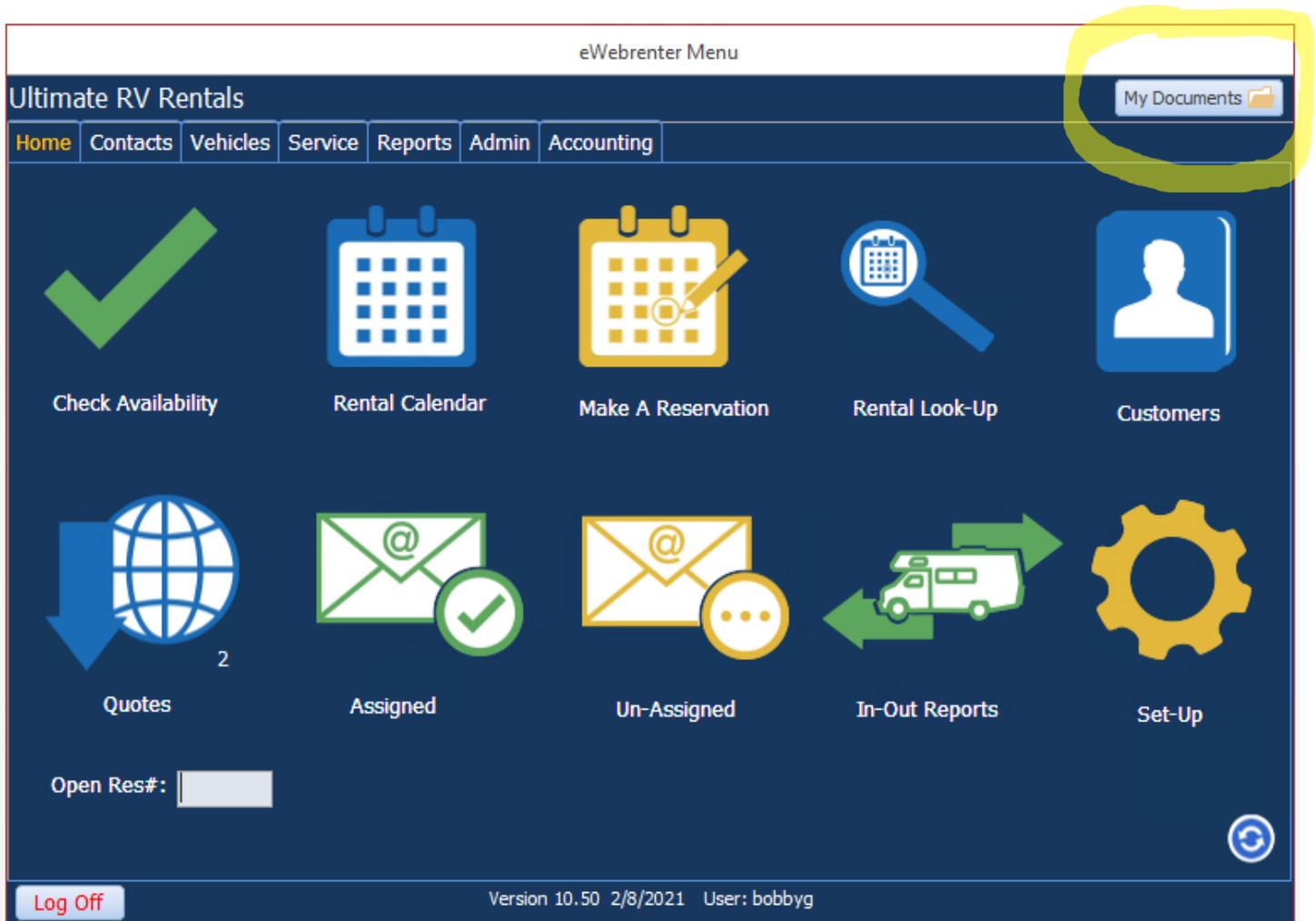
### DEFAULT YEAR

Admin -> Preferences -> Defaults (System) -> **Default Year**

The dropdown selection now supports years through 2030.

### DOCUMENTS FOLDER QUICK ACCESS

A “My Documents” button has been added to the header (upper right) of the main menu. This will open a file explorer window to allow you to navigate within your folders, allowing quicker access for when you need to cut/paste items to interface between your PC and EWebRenter.



This feature doesn't do anything with any file you might select, but simply serves to give you quicker access to your files.

## UPLOAD/VIEW CUSTOMER DRIVERS LICENSE IMAGES

Contacts -> Customers -> Find Customer, Select Customer -> Driver Info

You can now upload and view images of the front and back of a customer's drivers license.

The screenshot shows a web application window titled "Customer Information Form" with a close button (X) in the top right corner. The "Customer Name" field contains "Bobby Gorsica". To the right of the name field are two checkboxes: "Is Problem" (unchecked) and "Is Active" (checked), followed by the number "371". Below the name field is a horizontal menu with tabs: "Address", "More Info", "Spouse/Partner", "Driver Info" (selected), "Drivers", "Email", "Rentals", "Notes", and "QB".

The "Driver License Information" section contains the following fields:

- Name: Bobby Gorsica
- Birth Date: 10/1/1983 (with a calendar icon)
- Age: 38
- License #: P9999999991
- Expiration Date: 12/3/2022 (with a calendar icon)
- State: MA

To the right of these fields is a "Copy Customer Name" button.

The "Driver License Images" section is highlighted with a yellow border and contains:

- Two buttons: "View License Front" and "View License Back".
- A link: "Upload license images (2MB max size)".
- Two rows of upload controls:
  - Front: "Browse to select" text box, "Browse" button, "Clear" button.
  - Back: "Browse to select" text box, "Browse" button, "Clear" button.

At the bottom of the form are several buttons: "CC / Info", "View Credit Card Info", "Print Credit Card Info", "Print Customer Info", "Cancel", "Save" (highlighted with a dashed border), and "Save/Close".

When no image is present, the "View License \*" will be disabled. If an image is available, the corresponding button will be enabled.

### Upload a drivers license image

To upload an image, use the Browse button to select an image. This will open a "Select" window to your EWR Documents folder. Copy and paste the drivers license image(s) from your local PC to the EWR Documents folder. Make sure you then select the correct front/back image. **There is a maximum size of 2MB per image, so be sure when you scan or photograph the image, the output is of a reasonable size.** After you select the images, you will then see something like the following:

Driver License Images

View License Front View License Back

Upload license images (2MB max size)

Front: C:\Users\bobbyg\Desktop\BobLic\_Front.jpg Browse Clear

Back: C:\Users\bobbyg\Desktop\BobLic\_Back.jpg Browse Clear

Click the “Save” or “Save/Close” button to save. If you get a “Path/Access” error, then there is likely already an image of the same name stored, and you do not have permission to overwrite it. Change the filename and try again.

Once the images are successfully uploaded, you will see the “View” buttons enabled, and just the filename in the text boxes:

Driver License Images

View License Front View License Back

Upload license images (2MB max size)

Front: BobLic\_Front.jpg Browse Clear

Back: BobLic\_Back.jpg Browse Clear

Once you Close the form and re-open it, you will instead see default filenames for the images if they exist:

Driver License Images

View License Front View License Back

Upload license images (2MB max size)

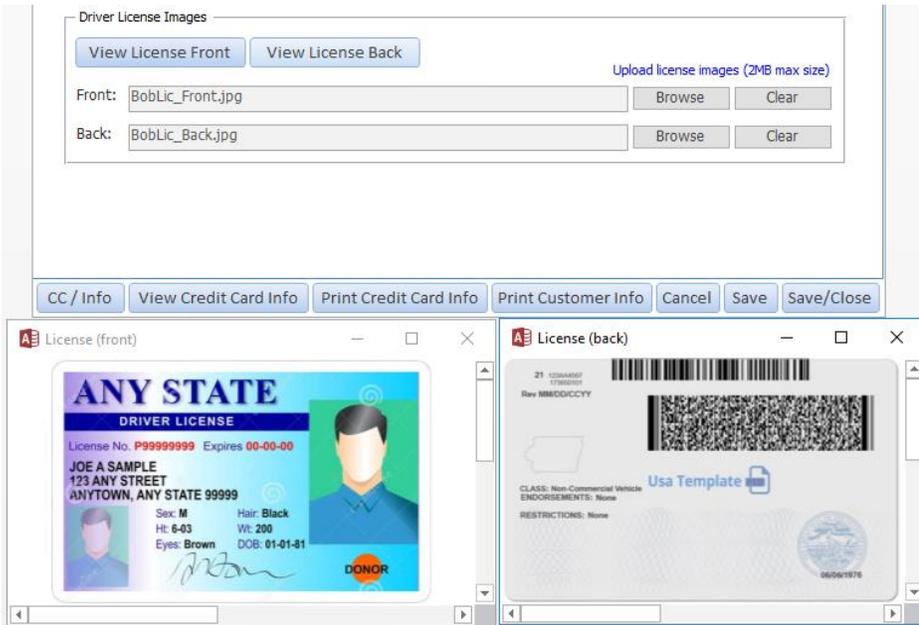
Front: customer\_drivers\_lic\_image1.jpg Browse Clear

Back: customer\_drivers\_lic\_image2.jpg Browse Clear

You can upload new images as necessary.

## Viewing a drivers license image

You can then use the “View” buttons to verify the upload. The views can be moved/re-sized as needed.



## BOOKING PORTAL

Other changes in this release are related to the online Booking Portal (see related documentation [here](#)) and include a few often-requested features:

- Delay Online Rental Hours: You can customize the delay between “now” and the time a vehicle is available to be rented online. You can now rent vehicles the same day, or perhaps not rent vehicles until three days from now – your choice.
- Prep Time: You can customize the delay between when a vehicle is returned and when it is available to go out again. For example, you might rent an ATV that has a turn-around time of one hour; or maybe a Class A vehicle needs 8 hours’ time. This value is included in the availability calculation.
- A fourth “reservation mode” which allows a customer to request a booking, including prices and availability, while creating a reservation in EWebRenter, but NOT booking the reservation.
- A customer can now filter on Awning, Towing, Pets, and Smoking. That is, if a customer selects “Pets”, for example, only those vehicles/classes that have “Pets allowed” selected will be displayed for rental.

## End of Version 10.50



# Version 10.49

## GENERAL

Changed the “Refresh the screen” icon from a red exclamation point to a blue refresh icon: 

Various bug fixes and continued cleanup of deprecated items.

## EMAIL: EMAIL SERVER

A major change was made in the way email sending/receiving is handled. Dealership Software will be deprecating the functionality of sending/receiving email directly from Dealership Software email servers. This means that each company will need to configure eWebRenter to use an email server of their choice, as well as designating a “reply-to” address. This configuration is done for each location, on the Location Information form under the Email Settings tab. 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 accessible to **all** agents so that they have access to all responses.

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

**Note:** The Outgoing SMTP server usually begins with “smtp.”, e.g. *smtp.my\_email\_server.com*

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.

By default, when you initially update to eWebRenter v10.49, and while you transition to your new email server, the “*Temporarily use legacy email server*” checkbox is ticked, which will cause email to be sent via Dealership Software’s email server. However, you will be prompted to configure your own email server every time an email is sent. Once you have configured and successfully tested your email server, make sure to untick this box.

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)

Test Settings

Clear

Temporarily use legacy email server

Cancel

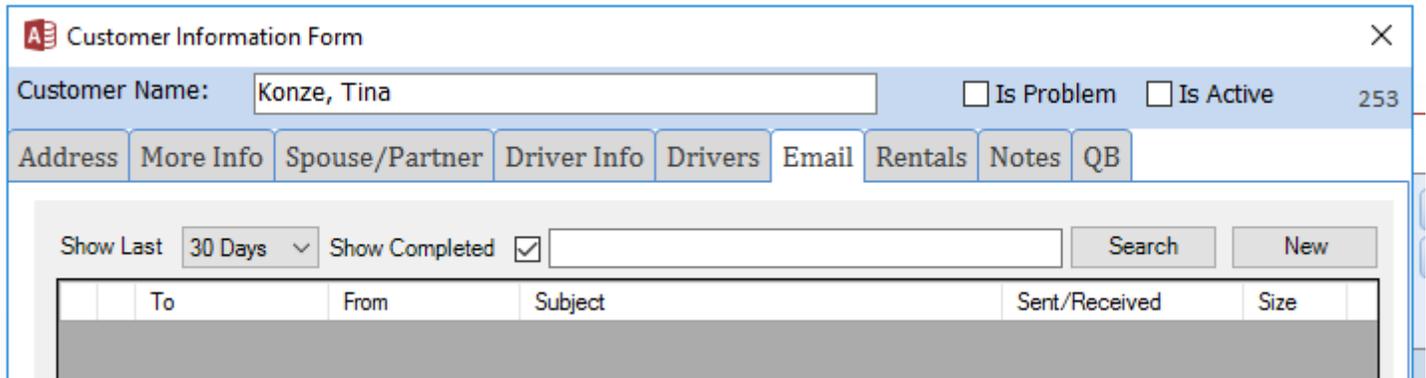
Save

Save / Close

## EMAIL: GENERIC FORM

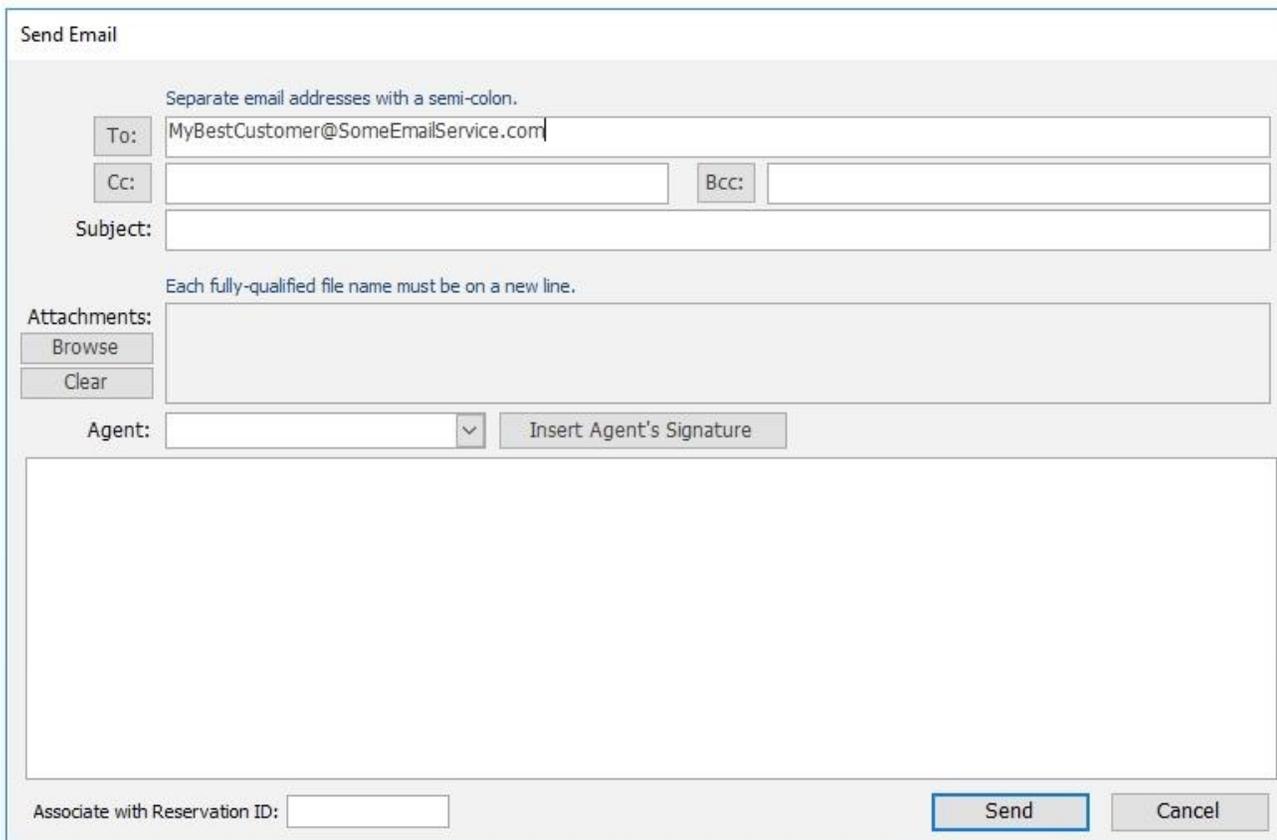
**Note:** This section does NOT apply to the eMail templates under Admin -> eMail.

You can create an email for Customers, Employees, or Owners. For example, on the Customer Information Form, under the Email tab, you can click the “New” button to compose an email:



The screenshot shows a window titled "Customer Information Form" with a close button (X) in the top right corner. The "Customer Name" field contains "Konze, Tina". To the right of the name field are two checkboxes: "Is Problem" and "Is Active", both of which are unchecked. A number "253" is displayed in the top right corner. Below the name field is a horizontal menu with several tabs: "Address", "More Info", "Spouse/Partner", "Driver Info", "Drivers", "Email", "Rentals", "Notes", and "QB". The "Email" tab is currently selected. Below the menu is a search area with "Show Last" set to "30 Days", a "Show Completed" checkbox which is checked, a search input field, and "Search" and "New" buttons. At the bottom of the search area is a table with columns: "To", "From", "Subject", "Sent/Received", and "Size". The table is currently empty.

When you do, a more generic email form is used:



The screenshot shows a "Send Email" form. At the top, it says "Separate email addresses with a semi-colon." Below this are three input fields: "To:" containing "MyBestCustomer@SomeEmailService.com", "Cc:", and "Bcc:". Below these is a "Subject:" field. A section for "Attachments:" includes "Browse" and "Clear" buttons and a large text area. Below the attachments is an "Agent:" dropdown menu and an "Insert Agent's Signature" button. At the bottom of the form is an "Associate with Reservation ID:" field, a "Send" button, and a "Cancel" button.

*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 web application window titled "Customer Information Form" with a close button (X) in the top right corner. The window displays customer information for "Gorsica, Bob" with a customer ID of 371. The "Address" tab is selected, and the "Email" sub-tab is active. The form contains the following fields:

Customer Name:	Gorsica, Bob		<input type="checkbox"/> Is Problem	<input checked="" type="checkbox"/> Is Active	371
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

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 this section is a "Customer Discount" field set to 0.00%.

At the bottom of the window are several buttons: "CC / Info", "View Credit Card Info", "Print Credit Card Info", "Print Customer Info", "Cancel", "Save", and "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 "mooz42@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 text input field for "To:" with the instruction "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 text area with the instruction "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 text input field for "Associate with Reservation ID:" and "Send" and "Cancel" buttons.

# CUSTOMER PORTAL

- A basic “Customer Portal” has been added which allows the customer to update relevant profile and rental information online rather than filling out paper forms. In conjunction with the Check Out form, you can configure which information to gather from the customer either at the time of check out or afterwards when an agent emails the customer a link to their user portal.
- The user portal is accessible via a URL link which is created via the EWR Rental page when a customer email is generated. The agent selects whether or not to include the link in the email.
- When creating an email template, the template designer can choose whether or not the email includes a link to the Customer Portal by default.
- You decide which fields (e.g., license, social security number, etc.) are hidden, optional, or required on the Customer Portal form.
- For security purposes, when a customer clicks on the email link, they are first brought to a page where they enter more information (last name, email address, and Rental ID).
- After entering the correct information, the customer’s portal is displayed; they can add/update the information that is displayed to them as was previously configured by you.
- You configure for how long the link is active; specifically, the company can invalidate the link any number of hours prior to the rental departure, i.e., to prevent the customer from making last second changes.
- If you are not currently using the Booking Portal, then via the eWebRenter “Online Basics” tab, you can select some aspects of the user portal’s theme to better match your company website, as well as upload your company logo. Booking Portal users configure their theme/logo via the Coppermine application.

## 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.

## CUSTOMER PORTAL: 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' dialog box with the following fields and content:

- Link:** Includes Link to Customer Registration Form (dropdown menu)
- Is Active:**  Is Active
- Is Automatic:**  Is Automatic
- Subject:** Does Not Include Link to Customer Registration Form (dropdown menu)
- CC:** (empty field)
- BCC:** (empty field)
- 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]]

Buttons at the bottom: Find, Delete, Copy, Cancel, Save, Save/Close

## CUSTOMER PORTAL: 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.

Rental Form
✕

---

From: Universal RV Main Location
To: Universal RV Main Location
Book Date: **10/25/19** Un-Book

Gorsica, Bob  
Daze Off  
Coachman C 26

**10/25/2019**

Res. ID: 2105    Wait List     Delivery

Leave On: Monday, October 28, 2019

**On Line**    Return On: Tuesday, October 29, 2019

Calendar

[< Select Another Vehicle >](#)

Email    Email Log    Veh. Info    Mi. Rates    Veh. Rates    Owner    Cancel    Drivers

Contract Rec.

Type: Reservation Request Generate e-Mail

Subject: Completing your reservation with [[CompanyName]]

Link: **Include Link to Customer Registration Form**

Hi [[First]] Do NOT Include Link to Customer Registration Form

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.

Agent:     Lead ?

Customer Info

Chg. Customer

Res. Req.

New Quote

Cancelled

Estimate Details				Final Details	Notes	Rates
by?	Night	Nights:				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
Extras Total:						\$0.00

## CUSTOMER PORTAL: 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.

Send an Email

<b>Name:</b> <input type="text" value="Bob Gorsica"/>	<b>Email:</b> <input type="text" value="Bob@Gorsica.com"/>	<b>Send Email</b>
<b>CC:</b> <input type="text"/>	<b>BCC:</b> <input type="text"/>	

**Subject:**

**Message:** https://online.ewebrenter.com/645/UniversalRVDemo/1/rc/50be1621f904140998dc4699c3e81ae504ca5f11a3e636c19a2b783d7d591e72/985a9e9871c68050f61c6c2bbd01df0c59c4b90f9371804ff238761e1f79ae16"/>

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

## CUSTOMER PORTAL: ONLINE BASICS

**PATH:** Admin/Company/Customer Portal / Booking Portal

The **Online Basics** fields are used for both the Customer and Booking portals. These values influence what the customer sees when they visit their user portal, and give you an opportunity to maintain your company's branding within the user portal.

Customer Portal / Booking Portal

Online Basics Customer Portal: Basic Booking Portal BP: Check Out Form

Links to Company Website

Home/Rental Page URL:  Include http:// or https://

Contact Page URL:

Customer / Booking Portal Theme Options

Primary Color:  Select

Secondary Color:  Select

Background Color:  Select

Company Logo:  Browse Clear

Save / Close

**“Links to Company Website”** contains required fields for URLs to your website which are used to navigate the user from a Portal back to your site.

- Ensure the *Home Page URL* field contains the URL to your main company website's home page. This is also used as a link behind your logo in the Booking Portal. Please include the http:// or https:// part as well.
- Ensure the *Contact Page URL* field contains the URL to your main company website's "Contact" page. Please include the http:// or https:// part as well.

**Note:** Modern browsers rank secure sites (e.g., https) higher than non-secure sites and are recommended.

**"Theme Options"** contains several fields related to the appearance of the Portals and are meant to help convey branding consistent with your Company's brand. You will find several fields: Primary Color, Secondary Color, Background Color, and Company Logo:

**Primary Color** is used for button background colors, border colors, etc., and is typically the darker color most associated with your brand.

- MUST be a darker color
- Should not be black

**Secondary Color** is used for hyperlinks and other highlighted information.

- Must NOT be black (which is used for general text) or white (which is typically used for the background)
- MUST be a medium or dark color that displays well against a white background
- Typically use the same color as is used on your main website for anchors/links when they are displayed against a white background

**Company Logo** is an image displayed in the **Customer** Portal's navigation area. It will be displayed with a maximum height of 80px. As a small logo, the image should be no larger than 100KB; acceptable formats are jpg/jpeg/png/gif.

**Note:** The logo image displayed for the **Booking** Portal is still the image uploaded to the Coppermine gallery. You may use the same image for both.

## CUSTOMER PORTAL CONFIGURATION

**PATH:** Admin/Company/*Customer Portal / Booking Portal*

The **Customer Portal: Basic** fields are used to control which fields are displayed to the customer when they visit their user portal, allowing them to enter/edit their information online.

Customer Portal / Booking Portal

Online Basics Customer Portal: Basic Booking Portal BP: Check Out Form

The online Customer Portal form enables your customer to enter/modify basic profile information to expedite the rental process. When you generate a customer email via the Rental form, you can choose to include a link to this portal. Below, you can choose to hide, or display as optional or required, the portal's form fields depending on how much information you want the customer to provide. Note: A choice made here may be overridden if the field is required by the software.

Hours prior to departure to lock form:

Field Description	Hide	Optional	Required
First name of customer	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Middle name of customer	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Last name of customer	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Billing address street and number	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Billing address apt or suite	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Billing address city	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Billing address state	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Billing address postal code	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Billing address country	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Phone number of customer	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Mobile number of customer	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Email address of customer	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Social Security Number of customer	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Name of business for billing	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Number of adults	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Number of children	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Number of pets	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Preferred contact method	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Preferred contact time of day	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Drivers license number	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

Save / Close

When you send an email to a customer via the EWR Rental form, you can choose to include a link to the Customer Portal. (When creating an email template, you may choose to add this link by default, though you may also over-ride the default option when generating the email.) When the customer clicks on the link in the email they receive, they will be taken to an online form where they have an option to review, add or edit information about themselves, such as their current address, Social Security Number, etc.. They will **not** be able to alter their **last name** or **email address** via their portal.

If you are also using the Booking Portal, there is a similar set of options for the *Checkout form* the customer sees when renting a vehicle. Using these two forms, you can decide how much information to capture when the customer initially requests a rental, versus after the request is reviewed by you. For example, you may

want to ask the customer to enter minimal information in the Booking Portal, then when you have reviewed their request, ask them to enter detailed information via the Customer Portal.

Using the remaining **Customer Portal radio buttons**, you decide which information you want the customer to submit via the Customer Portal. Information that the customer had previously submitted and was stored in your database will be displayed so that the customer does not have to re-enter information, although they may do so to update their data.

Simply tick the radio buttons for each field so that the form meets your needs. There are three choices:

- **Hide:** The field will not be displayed
- **Optional:** The field is displayed, but the user is not required to enter information into the field
- **Required:** The field is displayed, and the user must enter information into the field before proceeding

**“Hours prior to departure to lock form”** defaults to 72 (three days). You may not want your customer to be able to make online changes when it is close to their departure time, but rather have them call you directly. This feature allows you to set the number of hours prior to their departure time that any customer will be able to make online changes.

## Dashboard: Quotes

*Request Details tab:* Reorganized and added a field for Pets; Added a field displaying the number of travelers (seatbelts) requested. Please ensure that the number of passengers (Adults + Children) and seatbelts match, or contact the customer to confirm.

*Optional Equipment Requested tab:* Now displays equipment requested via the Booking Portal

*Additional Notes tab:* Now scrollable

*Developer tab:* Visible only to those in the Developer Security group

Original Rental Request Information

Request Details | Optional Equipment Requested | Additional Notes | Developer

Call Date Time: Fri 10/25/19 11:28 AM

Entered By:

Assigned To: Reservation Taker

Depart from: Universal RV Main Location

First Name: Bob

Last Name: Gorsica

Street Address: 85 Industrial Cr.

City: Lincoln

State: RI

Zip: 02865

Phone:

Cell Phone:

Email: Bob@Gorsica.com

How did you hear about Us: Website

Departure Date: 10/28/2019

Return Date: 10/29/2019

Vehicle Class: C 26

Vehicle:

Selected Destination:

Alternate Destination: Cambridge  Mi: 55

Adults: 2  Travelers (Seatbelts) Requested: 2

Children: 0

Pets: 0

# Rental Form

In addition to Adults and Children, a dropdown for Pets is now included.

Rental Form
✕

From: Universal RV Main Location
To: Universal RV Main Location
Book Date: **10/25/19** Un-Book

Gorsica, Bob      Res. ID: 2105      Wait List  Delivery

Daze Off      Leave On: Monday, October 28, 2019

Coachman C 26      **On Line** Return On: Tuesday, October 29, 2019

**10/25/2019**

Calendar

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< Select Another Vehicle >

Email   Email Log   Veh. Info   Mi. Rates   Veh. Rates   Owner   Cancel   Drivers

Type:  Generate e-Mail

Subject:

Link:

Agent: Reservation Taker   Lead ?

Contract Rec.

Customer Info

Chg. Customer

Res. Req.

New Quote

Cancelled

Destination   Equip.   Insur.   Paymts   Credits   Special   Out   IN   Extras/Taxed   Extras No/Tax   Exp.   Refund

Destination ID	Destination	Est. Miles	Adults	Children	Pets
<input type="text"/>	Cambridge	55	2	0	0

No Smoking of any thing Allowed. Or a \$250. deoderizing charge. UNIT MUST BE RETURNED IN SAME CONDITION AS PICKED UP. Fuel full, Holding tanks dumped.

Estimated Miles Cost

0.00	0.00	0.00	=	\$0.00
------	------	------	---	--------

Optional Equipment Total: \$0.00

Collision Damage Waiver: \$0.00

Extras Total: \$0.00

**Rental Total: \$456.00**

Sales Tax: \$28.50

**Rental Total w Tax: \$484.50**

Security Deposit: \$800.00

Rental Total w Deposit: \$1,284.50

Revenue Per Mile: \$8.29

Payments Total: \$0.00

Balance: **\$1,284.50**

Days Until: 0

Fax Cover   Custom Fax   Check Out Form   Print Cancel Policy

Delete   Check In Form   Print Extra Changes

Print Quotation   Print Rental Contract   Print All

Print Credits   Print Actual Charges   Close

## End of Version 10.49