

2. Booking and Reservation User Guides

Thank you for purchasing our extension. If you have any question that is beyond the scope of this document, do not hesitate to leave us an email.

By:Magenest| Support Portal: <http://servicedesk.izysync.com/servicedesk/customer/portal/3>

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Introduction

Magento 2 Booking and Reservation not only make it easy for your customers to schedule but also help you manage booking orders, customers, staffs and products on both larger screens and mobile devices.



Features For Admins

- A new, separate product type for Booking & Reservation.
- Define booking time by hours or days.
- Define a specific time range for Booking products, with multiple exclusion filters.
- Allow limiting Booking Orders with offline payment methods
- Declare and Display Terms & Conditions for your Booking Products.
- Display notification when there're cancellation requests for Booking Product, allows admin to decline or approve the request.

Features For Customers

- Responsive User Interface
- View all booking orders placed on the customer's account, easily accessible in the menu bar.
- Request cancellations for placed orders, with the ability to specify the amount and message to the store owner.

System Requirements

Your store should be running on Magento Community Edition version 2.3.x and 2.4.x

Configuration

Create a Booking Product

+ On the admin sidebar, choose **Catalog > Products >Add Product >Booking & Reservation**

The screenshot displays the Magento 2 admin interface. On the left is a sidebar with navigation icons for Dashboard, Sales, Catalog, Customers, Marketing, Content, Booking & Reservation, Reports, and Stores. The main area is titled 'Products'. At the top right, there are search and user icons. Below the title, there's a search bar and a table of products. A dropdown menu is open from the 'Add Product' button, showing options like Simple Product, Configurable Product, Grouped Product, Virtual Product, Bundle Product, Downloadable Product, and Booking & Reservation (which is highlighted with a red box). The product table has columns: ID, Thumbnail, Name, Type, Attribute Set, SKU, Price, Quantity, Salable Quantity, Visibility, Status, and Actions. It lists three products: Joust Duffle Bag, Strive Shoulder Pack, and Crown Summit Backpack.

ID	Thumbnail	Name	Type	Attribute Set	SKU	Price	Quantity	Salable Quantity	Visibility	Status	Actions
1		Joust Duffle Bag	Simple Product	Bag	24-MB01	\$34.00	100.0000	Default Stock: 100	Catalog, Search	Enabled	
2		Strive Shoulder Pack	Simple Product	Bag	24-MB04	\$32.00	100.0000	Default Stock: 100	Catalog, Search	Enabled	Main Website Edit
3		Crown Summit Backpack	Simple Product	Bag	24-MB03	\$38.00	100.0000	Default Stock: 100	Catalog, Search	Enabled	Main Website Edit

- Booking Products are virtual products, which have no weight and shipping costs.
- All new Booking products will be added to Booking Category by default. After installation, our module will generate the “Booking And Reservation” category and set this as the Booking Category. You can remove this selection and choose the Categories you want, or set a different Booking Category in module configuration.
- **Hold Quantity:** By default, booking products can be ordered with all payment methods (including free) and no restrictions. Hold Quantity allows limiting the concurrent number of Booking orders that can be placed with an offline payment method, like free or cash.
- After a booking slot reached its Hold Quantity limitation, that slot (along with other products in the cart) can only be purchased with an online payment method. The Hold Quantity will be refilled once offline orders of that slot are considered “Paid”.

Check/Uncheck Enable Unpaid Order to utilize this feature.

Choose the available Hold Quantity in the input below. If zero (0) is chosen, the module will use the Hold Quantity in module configuration instead.

- **Booking Available:** Choose the date range in which booking slots will be generated. Only the “From” date is required, the “To” date is optional.
- **Excluded Dates:** Specify multiple Date Ranges in which you want to prevent booking orders. Booking Slots won't be generated for dates in these ranges.
- **Booking Type:** Choose a booking type to decide how Booking Slots going to be generated:

Booking by Hours: Choose multiple time slots for each available booking date. Specify the time range and quantity for each slot.

Booking by Days: Choose available quantities for each weekday that can be booked. The time range for each weekday can be specified by toggle “**Enable Time Range**”

DASHBOARD

SALES

CATALOG

CUSTOMERS

MARKETING

CONTENT

BOOKING & RESERVATION

REPORTS

STORES

SYSTEM

FIND PARTNERS & EXTENSIONS

New Product

← Back

Add Attribute

Save

▼

Enable Product

[website]

Yes

Attribute Set

Default

▼

Product Name *

[store view]

SKU *

[global]

Price *

[global]

\$

Advanced Pricing

Visibility

[store view]

Catalog, Search

▼

Categories

[global]

Booking Test x

▼

New Category

Set Product as New From

[website]

To

Booking Type *

[global]

Book by Hours

▼

Hold Quantity

☐ Enable Unpaid Order

Leave as 0 to use module's hold configuration

Booking Available From *

[global]

To

Excluded Dates

From *

To *

Add

Booking Slots

From *	To *	Quantity *	
Add			

Enable Time Range
[global]

☒ Yes

Booking Slots

Event	Quantity *	From *	To *
Sunday	1	12:00	12:00
Monday	2	11:47	6:37
Tuesday	3	7:44	17:18
Wednesday	4	17:51	7:12
Thursday	5	9:00	6:43
Friday	6	9:33	7:30
Saturday	7	19:49	23:54

Choose Time

Time23:54

Hour

Minute

NowDone

Edit an available Booking Product

 You can also edit available Booking products.

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- MARKETING
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- BOOKING & RESERVATION
- REPORTS
- STORES
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- FIND PARTNERS & EXTENSIONS

Products

4 records found
20 per page
1 of 1

ID	Thumbnail	Name	Type	Attribute Set	SKU	Price	Quantity	Salable Quantity	Visibility	Status	Websites	Action
1		Test	Booking & Reservation	Default	Test	\$26.35	0.0000	No manage stock	Catalog, Search	Enabled	Main Website	Edit
2		product booking	Booking & Reservation	Default	product booking	\$90.00	0.0000	No manage stock	Catalog, Search	Enabled	Main Website	Edit
3		booking by hour	Booking & Reservation	Default	booking by hour	\$20.00	0.0000	No manage stock	Catalog, Search	Enabled	Main Website	Edit
4		booking days	Booking & Reservation	Default	booking days	\$20.00	0.0000	No manage stock	Catalog, Search	Enabled	Main Website	Edit

+ Magento's Product Grid allows filtering Product by **Type**, and you can also save filters as custom views for easy access.

⚠ **Note:** Attribute specified for Booking products can not be modified once created.

- DASHBOARD
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Products

Active filters: **Type: Booking & Reservation**

ID

from

Price

from

Quantity

from

Store View

All Store Views

to

to

to

Asset

Select...

Name

Type

Booking & Reservation

Attribute Set

SKU

Visibility

Status

1 records found
20 per page
1 of 1

ID	Thumbnail	Name	Type	Attribute Set	SKU	Price	Quantity	Salable Quantity	Visibility	Status	Websites	Action
2047		Test	Booking & Reservation	Default	Test	\$12.00	0.0000	No manage stock	Catalog, Search	Enabled	Main Website	Edit

Configuration

On the admin sidebar, choose **Booking & Reservation > Configurations:**

+ General

- **Enable Module:** Allow customers to access booking features. When disable, customers won't be able to place orders on Booking Products. The chosen Booking category will also be hidden and can be view until the module is re-enabled.
- **Booking Category:** Define the Booking Category, including:

Default category for new booking products.

Insert direct links to **"My Booking Orders"** in the menu bar entry of that category

Toggle category visibility on Frontend when enable/disable the module.

- **Hold Quantity:** The global Hold Quantity settings. Will be used when Hold Quantity for a product is enabled and set as 0.

Tip: Enable a product's Hold Quantity and setting its + global hold quantity to 0 will prevent placing orders with any offline payment methods.

- **Paid State:** If an order with offline payment methods reached this state, the amount of Hold Quantity it has taken from the booking slot will be replenished.

An order might skip the state defined in this configuration. In that case, that order will be considered "Paid" once it has been invoiced.

General

Enable Module
[store view]

Yes

Warning: Menu tab of the Booking Category selected below will be hidden after disabling module.
Changing both of "Enable Module" and "Booking Category" at the same time may lead to undesired visibility toggle for menu tab on Frontend.

Booking Category
[store view]

Booking And Reservation

This category will be used to insert link to "My Booking Orders" on Menu bar, as well as setting default category for "Booking & Reservation" product type.
Only include Categories that are visible on FE.
"Booking And Reservation" category is created automatically on module's installation.

Hold Quantity
[store view]

5

Maximum unpaid quantity. Changing this number will only affect products created after, since Booking Product data can't be changed once it's created.

Paid State
[store view]

Complete

Hold quantity will be replenish when the order reach this state.

+ Booking Settings

All timing calculations are done in the UTC timezone.

- **Allow customers to cancel orders before:** Customer won't be able to request cancellation if the amount of time left before Booked Date is below this value. Only calculate by Booking Date, not the Time Range (if specified) of that slot.
- **Maximum Booked Items:** Limit the number of unpaid orders a customer can have, which include:

Placed Orders that haven't reached "Paid" status.

Booking Products in customer's cart.

Leave as 0 to disable orders limit.

- **Minimum Booking Time:** A slot can only be booked if the amount of time before its date is above this value. Only calculate by date, not the Time Range (if specified) of that slot.
- **Days Off:** A global limit applied to all Booking Products. Prevent customers from booking the chosen weekdays, even if there're slots available on that date.
- **Terms & Conditions:** Enter unique Terms & Conditions for Booking Products. If available, the Terms & Conditions will be displayed as a tab in Booking Product pages, as well as a viewable popup when selecting Booking Slots.
- **Confirmation Required:** Require customers to agree to your Terms & Conditions before adding Booking products to the cart.
- **Confirmation Message:** Display on Product Booking Select popup, if Confirmation Required is enabled.
- **Error Message:** Display as a popup, if confirmation tickbox has not been checked.

Booking Settings

Allow customers to cancel orders before

[store view]

72

Unit: Hours

☒ Use system value

Maximum Booked Items

[store view]

0

Minimum Booking Time

[store view]

0

The customer have to book before x hours.

Days Off

[store view]

Sunday

Monday

Tuesday

Wednesday

Thursday

Friday

Saturday

Use **Ctrl+Click** to select multiple options.

Terms & Conditions

[store view]

Paragraph

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POWERED BY TINY

Rental policy will be displayed for all rental products. If left empty, policy tab will be hidden.

Confirmation Required

[store view]

Yes

Policy must not be blank if confirmation is required.

Confirmation Message

[store view]

I have read and accept the {{rental policy}}

☒ Use system value

Message will be displayed at policy confirmation check. Text inside double bracket {{ }} will open the **Terms and Conditions popup**.

Error Message

[store view]

Please read and accept our rental policy

☒ Use system value

Message if customer did not confirm policy.

+ Label Settings

- **Color For Full Booking Days:** Customize Full Booking Days (booking days with 0 quantity left) color on Booking Calendar popup in FE.
- **Color For Booking On Sale:** Customize Booking On Sale (booking days with custom pricing thanks to Reservation Rule) color on Booking Calendar popup in FE.

Label Settings

Color For Full Booking Days

#FF3939

Color For Booking On Sale

#333333

+ Email Notifications

- **Email Sender:** Select sender for Booking Orders' emails.
- **Order Confirmation Template:** Select Template sent to the customer after a Booking Order is placed.
- **Cancel Confirmation Template:** Select Template sent to the customer after a Booking Order is canceled.

Note: Custom Email Template can be created in **Marketing >Communications >Email Templates**

Email Notifications

Email Sender

General Contact

Order Confirmation Template

Email Purchase Confirmation Booking (Default)

Cancel Confirmation Template

Email Order Cancellation Booking (Default)

Booking Orders Management:

All Booking orders placed can be viewed in our module's Order Management grid, which can be accessed by clicking on **Booking & Reservation >Order Management**.

Dashboard

Sales

Catalog

Customers

Marketing

Content

Booking & Reservation

Reports

Stores

System

Find Partners & Extensions

Orders Management

Filters

Default View

Columns

Magento Order

from

to

Slots

from

to

Created At

from

to

Customer

Product

Booking Status

Cancel

Apply Filters

3 records found

20 per page

1 of 1

ID	Magento Order	Customer	Product	Slots	Start Time	End Time	Quantity	Hold Quantity	Total Price	Booking Status	Created At	Cancel?
3	000000020	@magenest.com	booking days	2021-05-09			4		\$80.00	Paid	2021-05-06 07:37:12	
2	000000019	@magenest.com	booking by hour	2021-05-08	13:00	18:00	2		\$40.00	Paid	2021-05-06 07:25:54	
1	000000019	@magenest.com	booking by hour	2021-05-07	13:00	18:00	1		\$20.00	Paid	2021-05-06 07:25:54	

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Magento ver. 2.3.6

[Privacy Policy](#)
[Account Activity](#)
[Report an Issue](#)

The Grid allows you to:

- Quickly view all booked slots, or navigate to the slots you need by filtering. You can filter Booking Orders by its Magento Orders, Booked Date, Created Date; as well as the Customer, Product, and current status of that orders.
- Checking out an Order with a special Booking Status system, allowing you to quickly determine the best course of action:

Ordered status is assigned when an order is placed with qty within hold limit but hasn't reached the defined Paid Status, and hasn't been invoiced or only partially invoiced. Only applied for the product with Unpaid Order enabled.

An order is considered Paid if it has reached the defined Paid Status, or it was fully invoiced, or the associated product "Unpaid Order" attribute is disabled, or the order quantity exceeded Hold Quantity.

An order is **Complete** if it has gotten past the **Booked Date** without being **Canceled**.

When Customers request cancellation, **Cancellation Requested** status will be assigned to the order.

An order is considered **Canceled** if its **Ordered Quantity = Canceled Quantity + Refunded Quantity**.

- Quickly respond to a cancellation request:

Review the request's message and quantity

The screenshot shows the 'Orders Management' interface. At the top, a yellow banner indicates 'There's currently 2 booking cancellation request(s). [Review Now.](#)'. Below this, the 'Orders Management' title is displayed. A table lists 13 records found, with columns for ID, Magento Order, Customer, Product, Slots, Start Time, End Time, Quantity, and Hold Quantity. Two records are visible: ID 13 (Magento Order 000000005, Customer [redacted]@magenest.com, Product Test 2, Slots 2021-06-25, Quantity 1, Hold Quantity 1) and ID 12 (Magento Order 000000004, Customer [redacted]@magenest.com, Product Test 2, Slots 2021-06-02, Quantity 1, Hold Quantity 1). On the right, a sidebar shows 'Booking Order #7' with details: Customer (hugh@n), Magento Order (00000000), Product (Test), Order Status (Processing), Request Message (Cancel Te), and Request Quantity (4). An 'Approve' button is visible at the top right of the sidebar.

- Quickly cancel the order if possible, otherwise redirect you to the order's credit memo page:

★ **NOTE:**

- **Every booking order is available as an Order Item for a Magento's Order:**
- Canceling a Magento Order will result in **all order items (include all booking orders) for that order being canceled**. If you need to cancel specific items in an order, please **invoice all other items first before proceeding with cancellation**.
- You'll be notified of all Booking Orders will be canceled, when using our Orders grid to review cancellation requests (See the picture below).
- To cancel a specific quantity for a Booking Order, the admin can invoice the remaining amount, before canceling the order.
- **Example:** If user requests canceling 3 out of 5 slots for an order, invoice 2 slots, then canceling the order.

- DASHBOARD
- SALES
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- REPORTS
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- SYSTEM
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There's currently 2 booking cancellation request(s). [Review Now.](#)

Orders Managemen

13 records found

ID	Magento Order	Customer
13	000000005	hungh@ma
12	000000004	hungh@ma
11	000000004	hungh@ma
10	000000003	hungh@ma
9	000000003	hungh@ma
8	000000003	hungh@ma
7	000000003	hungh@ma
6	000000003	hungh@mag

Close

Confirmation

Are you sure about canceling this Magento Order?

The following Booking Orders will be canceled:

Product Name	Booked Slot	Quantity to Cancel
Test	Tuesday, Jun 01, 2021, from 8:00 to 19:00	3
Test	Wednesday, Jun 02, 2021, from 8:00 to 19:00	5
Test	Thursday, Jun 03, 2021, from 8:00 to 19:00	2
Test	Friday, Jun 04, 2021, from 8:00 to 19:00	6
Test	Saturday, Jun 05, 2021, from 8:00 to 19:00	7
Test	Sunday, Jun 06, 2021, from 8:00 to 19:00	3
Test	Monday, Jun 07, 2021, from 8:00 to 19:00	6
Test	Tuesday, Jun 08, 2021, from 8:00 to 19:00	9
Test	Thursday, Jun 10, 2021, from 8:00 to 19:00	4

Cancel

OK

Approve

Booking Order #7

Customer: [hungh@n](#)

Magento Order: [00000000](#)

Product: [Test](#)

Order Status: Processing

Request Message: Cancel Te

Request Quantity: 4

Storefront

Product Page

★ NOTE:

- Booking Products can only be ordered by registered customers. **Guest checkout is not supported at the moment.**
- Booking Products can't be mixed with other products type in the cart. **Do not add other types to the cart when ordering Booking Products.**
- Multishpping checkout is not available for Booking Product at the moment.
- Booking Products require custom options and can't be added to the cart directly from the product listing page. **Customers will be redirected to the Product Page when trying to add the Booking product from the listing page.** Options selection for Booking Product in the listing page is not available at the moment.
- Terms & Conditions: Viewable as Product tab and Popup.

LOREM
CONSECTETUR
QUI
SED
LABORE
SIT
DOLOR
ADIPISCING
AMET
MA

Test

[Be the first to review this product](#)

\$12.00

[Book Now](#)[♥ ADD TO WISH LIST](#)[📊 ADD TO COMPARE](#)[More Information](#)[Reviews](#)[Terms & Conditions](#)

Lorem Ipsum

"Neque porro quisquam est qui dolorem ipsum quia dolor sit amet, consectetur, adipisci velit..."

"There is no one who loves pain itself, who seeks after it and wants to have it, simply because it is pain..."

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nam pretium felis nisi, ac bibendum nibh sodales at. Maecenas ultricies cursus cursus. Nullam tempus tincidunt pharetra ipsum vestibulum et. Integer ultrices, sem vitae porta maximus, sem ligula efficitur dui, sed aliquet arcu est vitae augue. Donec justo urna, tristique ac libero et fermentum purus. Duis tincidunt commodo congue. Maecenas laoreet rhoncus mauris. Curabitur hendrerit posuere consequat. Vestibulum blandit tristique erat a eleme Interdum et malesuada fames ac ante ipsum primis in faucibus.

Terms & Conditions

Lorem Ipsum

"Neque porro quisquam est qui dolorem ipsum quia dolor sit amet, consectetur, adipisci velit..."

"There is no one who loves pain itself, who seeks after it and wants to have it, simply because it is pain..."

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nam pretium felis nisi, ac bibendum nibh sodales at. Maecenas ultricies cursus cursus. Nullam tempus tincidunt neque, a pharetra ipsum vestibulum et. Integer ultrices, sem vitae porta maximus, sem ligula efficitur dui, sed aliquet arcu est vitae augue. Donec justo urna, tristique ac libero eu, varius fermentum purus. Duis tincidunt congue. Maecenas laoreet rhoncus mauris. Curabitur hendrerit posuere consequat. Vestibulum blandit tristique erat a elementum. Interdum et malesuada fames ac ante ipsum primis in faucibu

To: 19:00			
ID: 43 Day: 2021-06-18 From: 8:00 To: 19:00	10	0	\$12.00
TOTAL		0	\$0.00

☐ I have read and accept the [rental policy](#)

[Add To Cart](#)

[Click here to check the Terms and Conditions](#)

- **Select Booking Date:**

Color for Full Booking Days: #7ad0f5

Color for Booking On Sale: #3beb31

Welcome, Hung Huynh!

Search entire store here

What's New
Women
Men
Gear
Training
Sale
Booking And Reservation

Home > Booking

Booking calendar

June 2021

MON	TUE	WED	THU	FRI	SAT	SUN
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

Note :
On Sale
Full Booking

Next step

ADD TO WISH LIST
ADD TO COMPARE

More Information

Reviews

Terms & Conditions

- **Select Booking Slots:**

The price and quantity are binding and will adjust accordingly to each other.

What's New

Women

Home > Booking And Reservation

Booking Selection

No.	Availability	Quantity	Price
ID: 41 Day: 2021-06-16 From: 8:00 To: 19:00	10	1	\$12.00
ID: 42 Day: 2021-06-17 From: 8:00 To: 19:00	10	2	\$24.00
ID: 43 Day: 2021-06-18 From: 8:00 To: 19:00	10	3	\$36.00
TOTAL		6	\$72.00

☐ I have read and accept the [rental policy](#)

Add To Cart

My Booking Orders

- Customers can view details about orders they've placed, the amount of time left to cancel, and request/review cancellation requests.
- A request that hasn't been responded to can be edited, both the message and quantity.



My Account
My Orders
My Downloadable Products
My Wish List

Address Book
Account Information
Stored Payment Methods

My Product Reviews
Newsletter Subscriptions

My Booking Orders

Compare Products

You have no items to compare.

Recently Ordered

- ☐ Test
- ☐ Test
- ☐ Test

Add to Cart View All

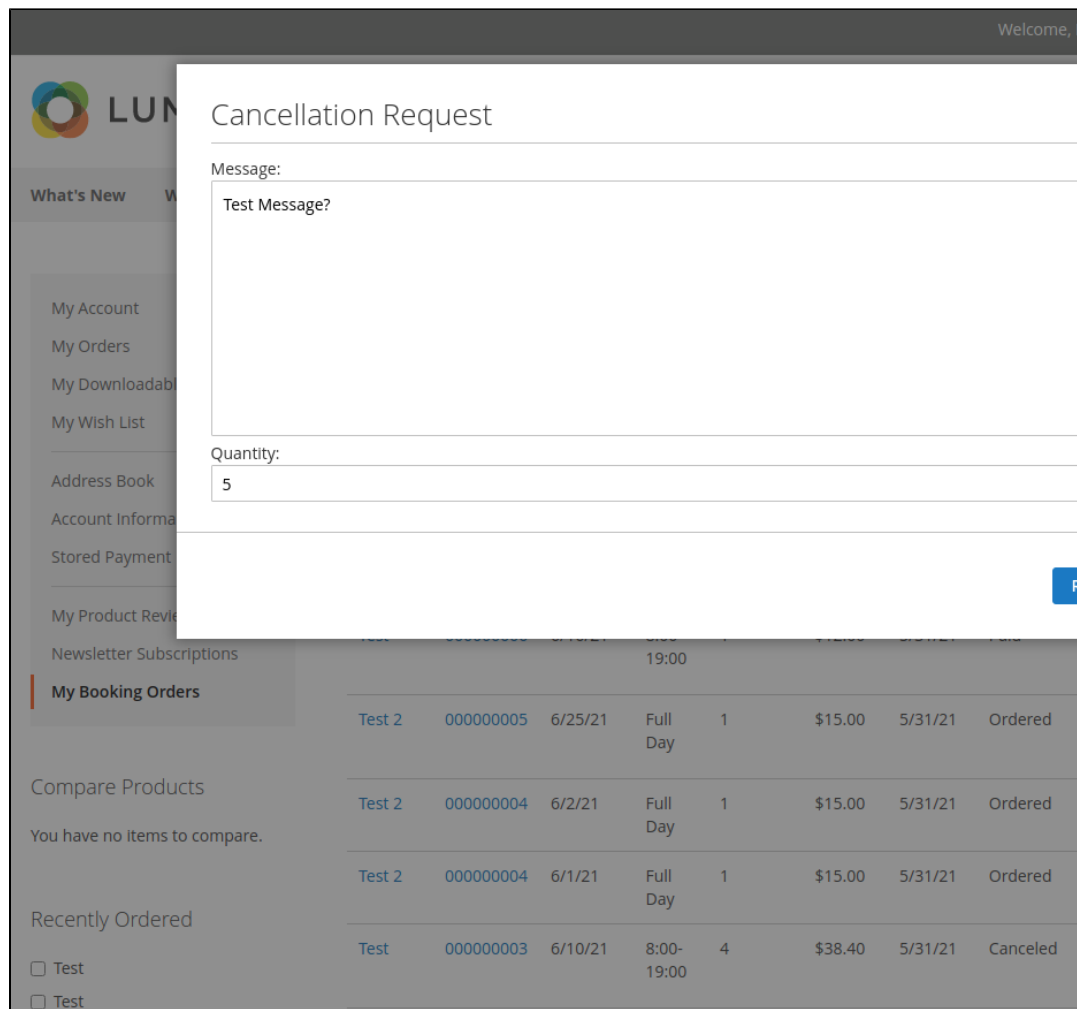
My Wish List

You have no items in your wish list.

My Booking Orders

Product	Order #	Booked Date	Time	Quantity	Order Total	Order Date	Status
Test	000000006	6/18/21	8:00-19:00	3	\$36.00	5/31/21	Cancellation Requested
Test	000000006	6/17/21	8:00-19:00	2	\$24.00	5/31/21	Paid
Test	000000006	6/16/21	8:00-19:00	1	\$12.00	5/31/21	Paid
Test 2	000000005	6/25/21	Full Day	1	\$15.00	5/31/21	Ordered
Test 2	000000004	6/2/21	Full Day	1	\$15.00	5/31/21	Ordered
Test 2	000000004	6/1/21	Full Day	1	\$15.00	5/31/21	Ordered
Test	000000003	6/10/21	8:00-19:00	4	\$38.40	5/31/21	Canceled
Test	000000003	6/9/21	8:00-19:00	8	\$76.80	5/31/21	Canceled
Test	000000003	6/8/21	8:00-19:00	9	\$86.40	5/31/21	Canceled
Test	000000003	6/7/21	8:00-19:00	6	\$57.60	5/31/21	Canceled

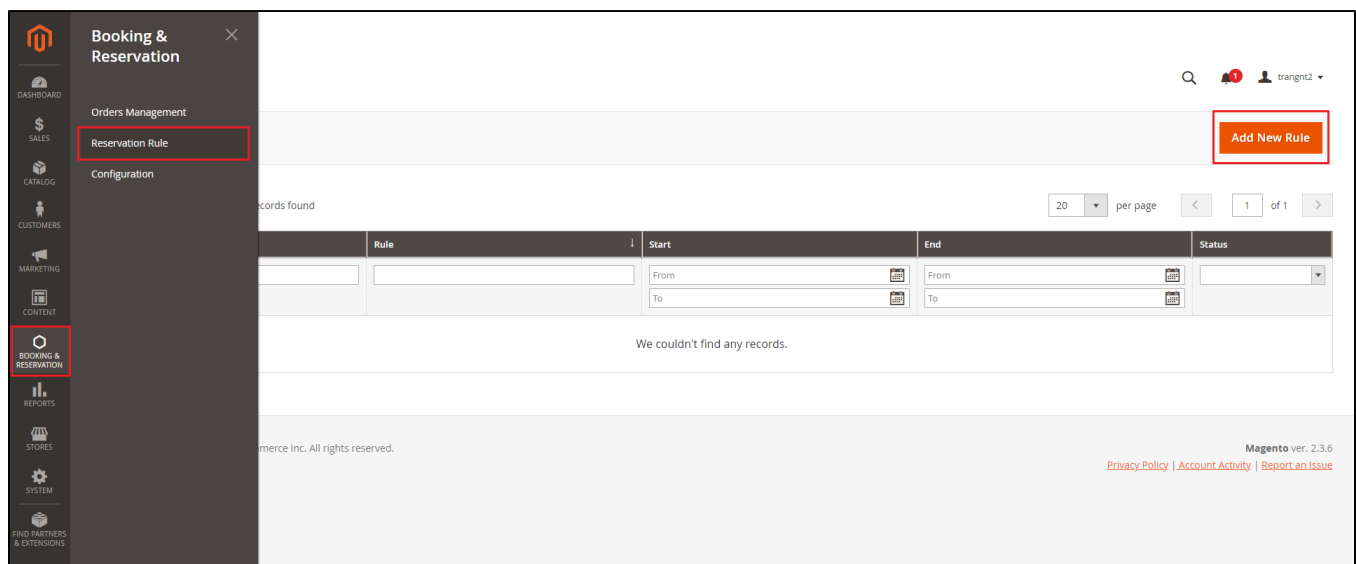
Items 1 to 10 of 16 total



Create Reservation Rule

Reservation rules will be used to create promotion programs for Booking products. To create a new Reservation rule, follow these steps:

+ Step 1: On the Admin sidebar, go to **Booking & Reservation > Reservation Rule > Add New Rule**



	Priority Enter a number to establish the Priority of this rule in relation to other rules. The Priority setting is important when the same catalog product meets the conditions set for more than one price rule. The rule with the highest priority setting (1 being the highest) will become active for the product.
--	---

+ Step 3: Setup Rule Options

All options in this section will be applied in the above period of time (*). With this setting, you can set a recurring time to apply the rule such as Every day, Every week, Every month, and Every Year.

Section	Filed name	Content
Rule Option All options in this section will be applied in the above period of time (*)	Rule option	You can set Recurring time: Every Day, Every Week, Every Month, Every Year
	Rule Day From ... Rule Day To	Days of the week or month that will apply the rule
	Rule Date From ... Rule Date To	Days of the year that will apply the rule
	Rule Time From ... Rule Time To	Period times of a day which will apply the rule

+ Step 4: Define the Conditions

Reservation rules support 2 conditions, that is, apply to all booking products in a specific category or SKU product

This section works like the Conditions section of Catalog Price Rule, please navigate [here](#) to know how to define conditions.

+ Step 5: Define the Actions

This section is similar to the configuration in Catalog Price Rule, please navigate here to check [the instruction](#)

Update

- When a bug fix or new feature is released, we will provide you with the extension's new package.
- All you need to do is repeating the above installing steps and uploading the package onto your store. The code will automatically override.
- Flush the config cache. Your store and newly installed extension should be working as expected.

Support

- We will reply to support requests after **2 business days**.
- We will offer **lifetime free update and 6 months free support for all of our paid products**. Support includes answering questions related to our products, bug/error fixing to make sure our products fit well in your site exactly like our demo.
- Support **DOES NOT** include other series such as customizing our products, installation and uninstallation service.

Once again, thank you for purchasing our extension. If you have any questions relating to this extension, please do not hesitate to contact us for support.