# **Rental System User Guide**

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 via s upport@magenest.com

Updated: 11th May, 2021 | By:Magenest | Support Portal: http://servicedesk.izysync.com/servicedesk/customer/portal/54

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# Introduction

Rental System for Magento 2 is an effective tool to turn your eCommerce website into a comprehensive rental system. This business model helps merchants increase the revenue significantly by gaining multiple sales orders from one single product.

## **Feature**

### **Features for Admin**

- Easily create a rental product with a new product type Rental product.
- Set rental period for products: hour(s), day(s).
- Set the rental price for fixed rental period and additional rental time.
- 2 delivery types: shipping or store pickup.
- Set the address for store pickup and lead time for shipping.
- Additional options for rental products with fixed price or based on rental hours.
- Set advanced reservation period and maximum rent duration for rental products.
- Set store's days off and available hours for renting.
- Set holidays.
- Add the rented quantity on the product detail page.
- · Add store's rental policy.
- Create and assign email templates for rental receipt with unique identification code.
- Track stock qty, available qty and times rented of rental products.
- View and change status of rental orders.
- Change the calendar's locale settings.
- Hold rented product: This feature changes how unpaid orders can affect the available quantity of rental products.
- View rental orders and products reports.



### **Features for Customers**

- · Choose flexible rental duration and multiple additional options.
- View local pickup locations with integrated google maps
- View personal rentals order on order grid or calendar.
- Two-way shipping to receive and return the rental items.

## **System Requirements**

You store must be running on:

- Magento Community Edition version 2.2.x, 2.3.x.
- Magento Enterprise Edition version 2.2.x, 2.3.x.

# Configuration

- On Magento 2 back end, go to Stores > Configuration.
- 1 On the Configuration page, expand the Magenest section then select Rental System to set general configuration for the extension.

## **General Settings**

- Pattern To Generate Code: This is the setting for the rental receipt code format. [A2] is to generate 2 random alphabet characters,
   [N4] is to generate 4 random numbers while "Magenest" is the hard code.
- Google API Keys: Fill in your Google API Keys to integrate Google map. This map will be displayed on the product page. To learn more about the way to get API Key, please visit here.

## **Rental Settings**

• Hold: Set the maximum reserved and waiting for payment quantity.

This feature changes how unpaid orders can affect the available quantity of rental products. If you don't want unpaid orders to affect the rentable quantity of other customers, set hold to 0. If you want unpaid orders to fully affect the rentable quantity of other customers, set hold equal to the total quantity of the rental product.

Example: A rental product has qty = 10, hold =5. A customer placed an order for the duration X to Y with qty = 10, but haven't paid. Hold qty for the product in duration X to Y will be whichever number is smaller between unpaid qty and hold qty, or min(unpaid, hold) = min(10, 5) = 5.

Another customer looking to rent in this duration can rent maximum (stock qty - qty in hold - paid qty) = (10 - 5 - 0) = 5 products. However if the first customer pays for their order, then hold becomes 0 but paid qty becomes 10, so other customers can rent maximum (stock qty - qty in hold - paid qty) = (10 - 0 - 10) = 0 product. as in product will be out of stock in this duration.

- Enable Qty Rented: Choose Yes to display the rented quantity on the rental product detail page.
- Advance Reservation Period(days): Set a maximum period from now can a rent start. This prevents selecting renting time too far
  in the future. The default unit for this field is "day".
- o Enable Calendar: Choose Yes to enable the rental calendar on My Account page.
- · Pas Rents color, Ongoing Rents color and Future Rents color: set color of rents on My Rents calendar page
- Maximum rent duration: Set the maximum length of time for rent.

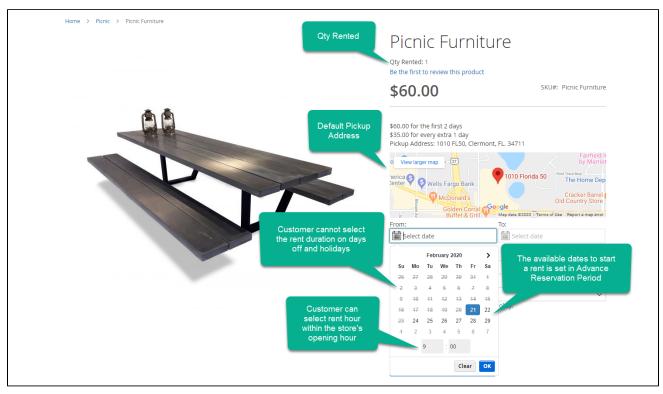
<u>Note</u>: Admin can set the maximum rent duration for each rental product on the product setting page.

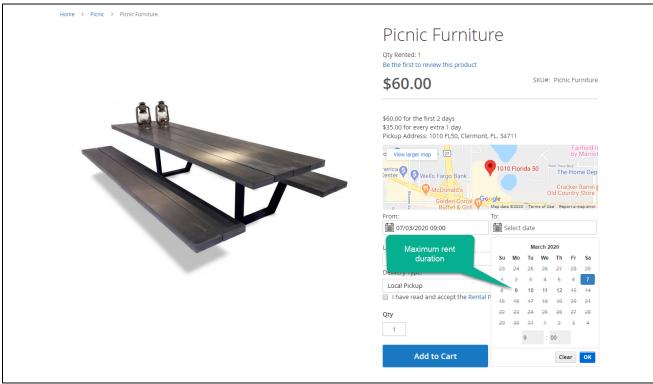
- Days off: Select one or more days off for the store. On the selected day(s), customers can't choose as start/end date of rent duration.
- Holiday: Add store holidays. Enter the day and month of holiday in number form.
- . Opening Hours: Set the store opening time. This is also the available time that customers can select in the hour field.
- Default Pickup Address: Set the default address for local pickup products.

A Note: Each product can have its own pickup address on the product setting page.

Rental Settings		
Hold [store view]	5 Maximum unpaid. Default 5	<b>☑</b> Use system value
Enable Qty Rented [store view]	Yes ▼  Enable/Disable Qty Rented	Use system value
Advance Reservation Period(days) [store wew]	1000  Maximum period from now can a rent start.	
Maximum Rent Duration(days) [store view]	365 Default maximum duration setting. Products can override this setting.	
Days Off [store view]	Monday Tuesday Wednesday Thursday	
	Friday Saturday Sunday No day off	
	Use CTRL+click to select multiple days.	
Holidays [store view]	Date (format YYYY/MM/DD) Action  Add Date	
Opening Hours [store view]	Days Off and Holidays cannot be set as the start or end date of rent duration  9 a.m.   11 p.m.   Customers can only set start/end rent durations within opening hours.	
Default Pickup Address [store view]	1010 FL50, Clermont, FL. 34711	
Enable Calendar [global]	Yes Enable/Disable calendar in Customer's Rental Orders	☑ Use system value
Past Rents color [store view]	3a87ad	■ Use system value
Ongoing Rents color [store view]	3a87ad	✓ Use system value
Future Rents color [store view]	3a87ad	✓ Use system value

Display of the configures on store front





# **Calendar Settings**

This section allows setting the time format on the storefront.

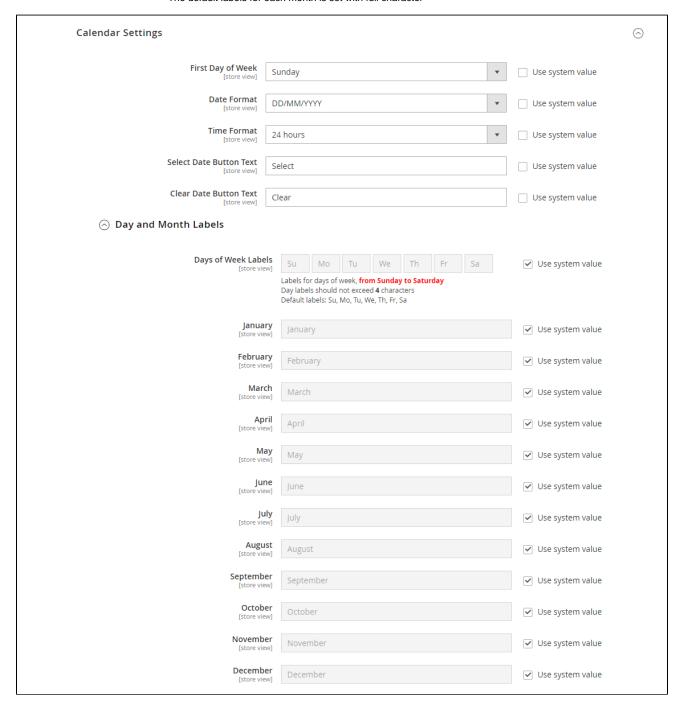
- First day of week: Select the first day of a week that suitable for the schedule of each store.
   If you tick on the box Use System Value, the default first day of a week will be set as Sunday.
- Date format: Choose the date format that will display on the date box after customers select dates for their rental period. If you tick
  on Use system value, the default format will be set as MM/DD.
- Select date button text: Enter the text for the select button that customer will click on to set their rental date. The default text is Select.

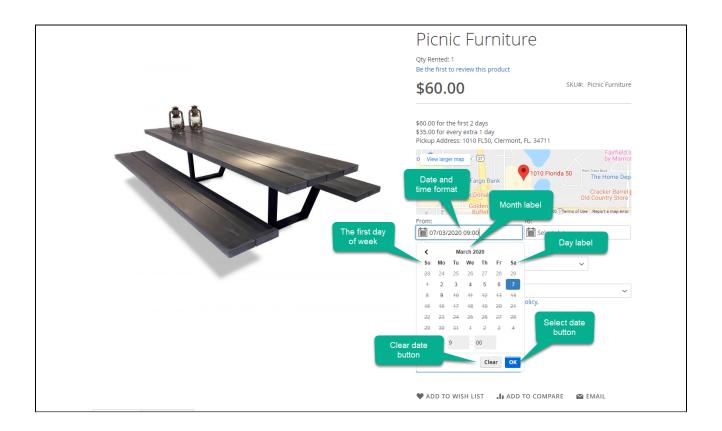
Clear date button text: Enter the text for the button which is used to reset the rental period. The default text is Clear.

### **Day and Month Label**

In this section, admin can set the label for date and month that will display on the Date Picker box when the customer sets their rental period.

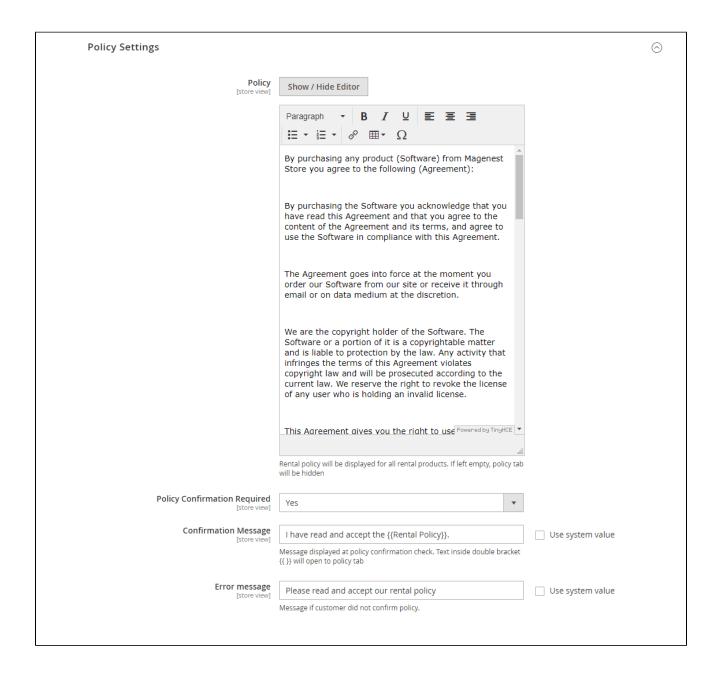
- Day of Week Labels: Enter the label for each day of a week on each small box. A week is set from Sunday to Saturday.
  - ⚠ <u>Note</u>: The Day labels should not exceed 4 characters. If you choose **Use system value**, the default labels will be set with 2 characters as *Su, Mo, Tu, We, Th, Fr, Sa*.
- Then enter the labels for each month. You can tick on the boxes Use system value to set the labels as default.
   The default labels for each month is set with full character



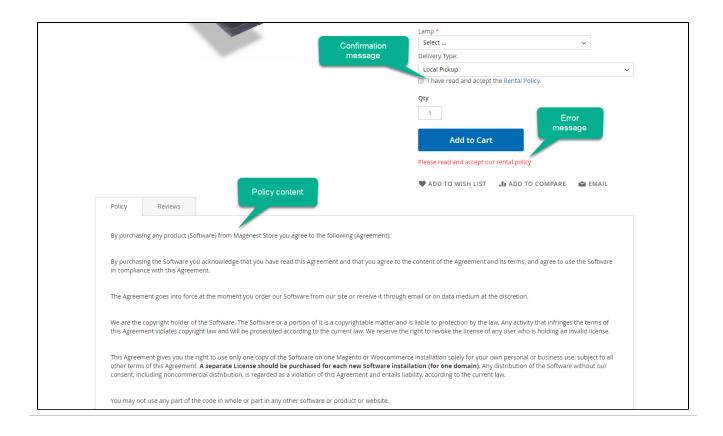


# **Policy Setting**

- Click on the button Show/Hide Editor to edit the policy. You can insert the illustrated image for the policy. Then enter the rental policy.
- Note that rental policy will be display for all rental products. If the text is left empty, the policy tap will be hidden.
- Policy Confirmation Required: If choose Yes, customers will be required to tick on the confirmation box before renting any product.
- Confirmation Message: Enter the message that will be displayed at the policy confirmation checkbox. The text inside the double bracket will redirect to the policy tab. The default message on this section is "I have read and accept the {{rental policy}}".
- Error message: Enter the message that will show up in case the customer does not confirm the policy. The default message in this
  section is "Please read and accept our rental policy".

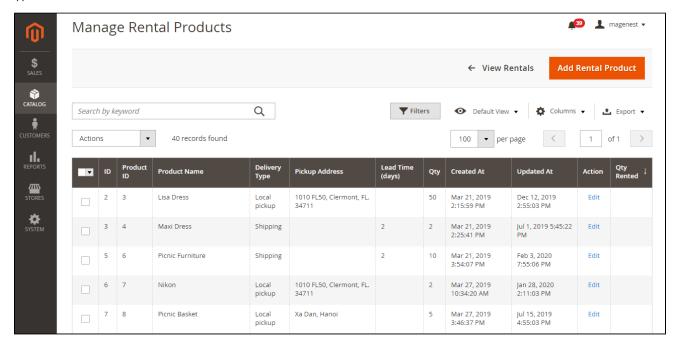


Display of the configures on store front



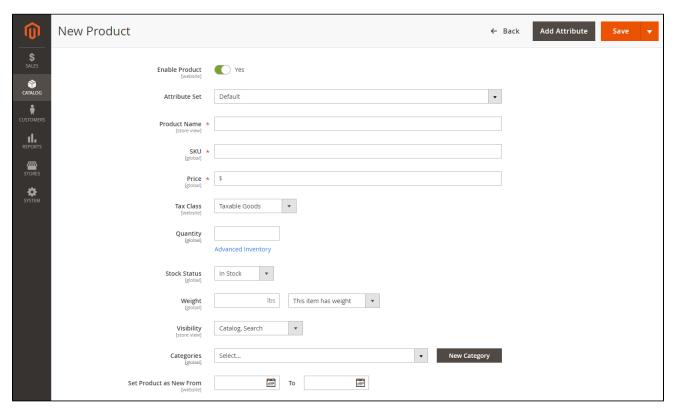
# Add a new rental product

- On the admin sidebar, go to Catalog > Magenest Rental Management > Rental Products.
- On the Manage Rental Products page, admin can edit or delete available rental products on list gird. Export using CSV and Excel XML are supported.



To add a new rental product, click on Add Rental Product button, go to New Product page.

Set the basic configuration for the new product such as name, quantity, category, image.



♣ Expand the Renal section to set the rent functions for the product.

## **Rental Price**

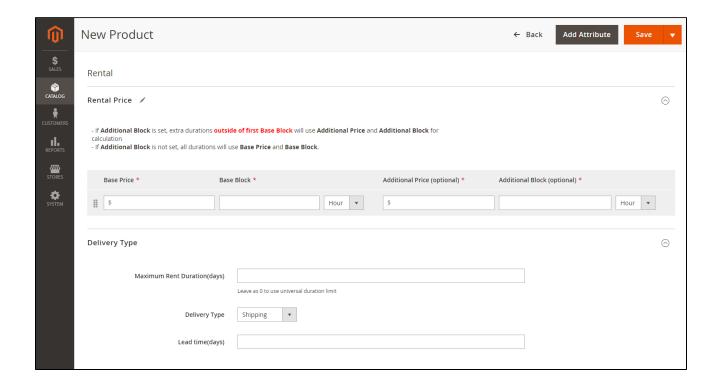
- Base price and Base block (required): Set the rental price for each rental period/duration (odd duration are treated as extra block /period). The base rental price will override the product's base price value.
- · Additional price and additional block (optional): Set a different price for an additional duration which exceeds the base block.

For example, the base price for Lady Dress is \$10 for 5 days. From the 6th day, the additional charge for the Lady Dress is \$5 per day.

- Rental price calculation:
  - O Without additional block: (duration/base block) rounded up, then multiply by base price.
  - O With additional block:
    - If the duration is smaller or equals base block: base price
    - If the duration is longer than base block: Base price + [(duration base block)/(additional block) rounded up, then multiply by additional price]

## **Delivery type**

- Maximum rent duration (days): If empty, products will use default maximum rent duration value from Store Configuration.
- Delivery Type: select a delivery type for rental products. There are 3 options: Shipping, Local Pickup and Both.
  - If choose Shipping, set the lead time. Customer cannot start renting during the lead time period. Lead time is displayed on the product page.
  - If choose Local Pickup, enter an address that customer can get the rental products. The address will be displayed on the product page on Google map.
  - Select Both to enable two delivery types.



## **Email Setting**

Select a template for receipt email. Admin can choose between default template or another customized template (created from Marketing -> Email Templates). Default email template is as follows:

#### Default email template

{{template config\_path="design/email/header\_template"}} {{trans "Your rental order from %store\_name." store\_name=\$store.getFrontendName()}} <strong>{{trans "Product: "}}</strong> <em> {{var title}}</m> <strong>{{trans "Order: "}}</strong> {{var order\_id}} <strong> {{trans "Customer: "}}</strong> {{var customer\_name}} <strong> {{trans "Code: "}}</strong> {{var rental\_code}} <strong> {{trans "Rent From: "}}</strong> {{var start\_time}} <strong> {{var qty}} <strong> {{trans "Rent From: "}}</strong> {{trans "Qty: "}}</strong> {{var qty}} <strong> {{trans "Delivery type: "}}</strong> {{var rent\_type} <strong> {{trans "Additional Option: "}}</strong> {{var additional\_options}}

#### Hold

 $^{\circ}\,$  Hold: Set the maximum reserved and waiting for payment quantity.

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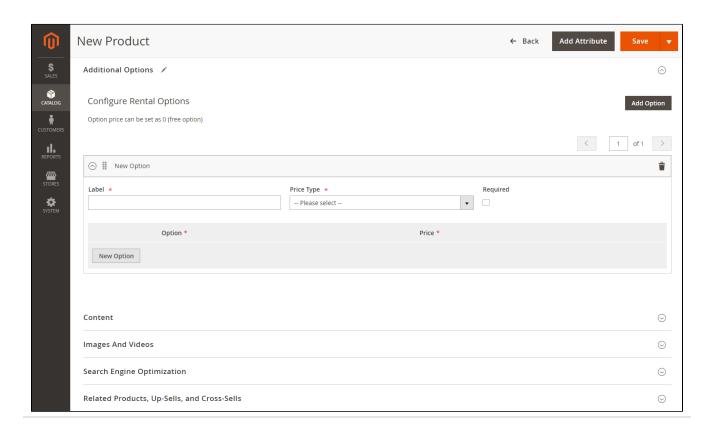
Another customer looking to rent in this duration can rent maximum (stock qty - qty in hold - paid qty) = (10 - 5 - 0) = 5 products. However if the first customer pays for their order, then hold becomes 0 but paid qty becomes 10, so other customers can rent maximum (stock qty - qty in hold - paid qty) = (10 - 0.00) = 0 product. as in product will be out of stock in this duration.

⚠ Note: the Hold setting here will override the same setting on the configuration page.



# **Additional Options**

- O Admin can add unlimited additional items that customers can rent with the main product.
- The option price can fixed, or calculated per day/per hour.

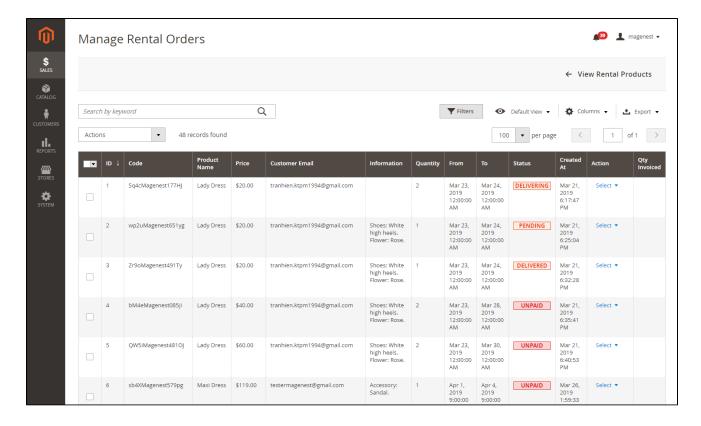


# **Manage Rental Orders**

• On the admin sidebar, go to Sales > Rental Orders. On Manage Rental Orders page, admin can view orders, send receipt and change rental order status manually.

- There are some default status of rental orders:
  - Pending: Customers place a rental order successfully.
  - Delivering: Rented items are being shipped to billing address.
  - Delivered: Customers receive the rented items.
  - Returning: Rented items are in the way back to store.
  - Complete: When items already back in store.
  - Cancel: When the rental order is canceled while being pending.

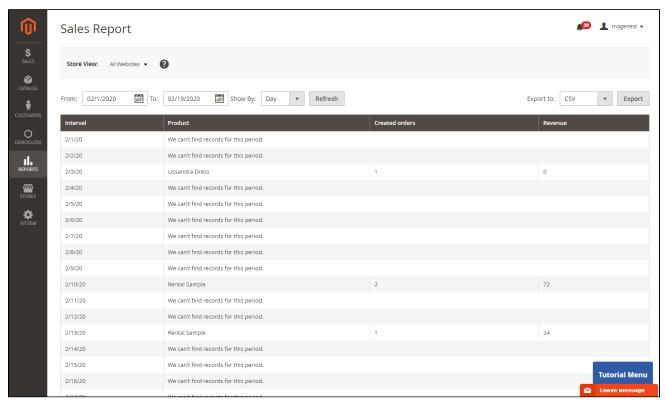
A Note: When an invoiced rental order is canceled, it remains in the recent status.



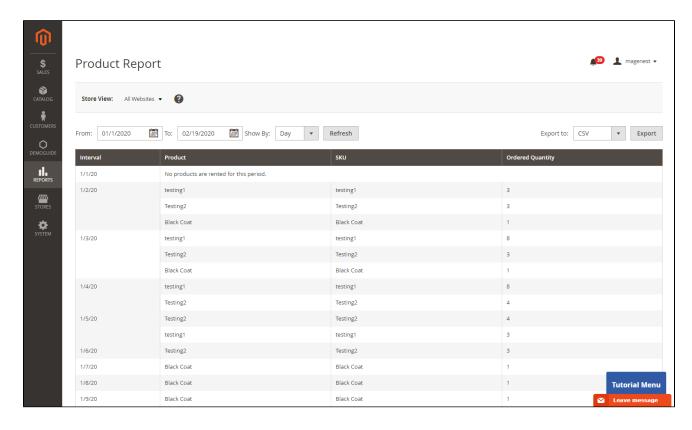
### View rental reports

There are two available rental reports: sales report and products report.

• On the admin sidebar, go to Reports > Magenest Rental Report > Sales Report to view the sales reports of rents. On Sales Report page, select the time of report then click on Refresh button, the report will display.



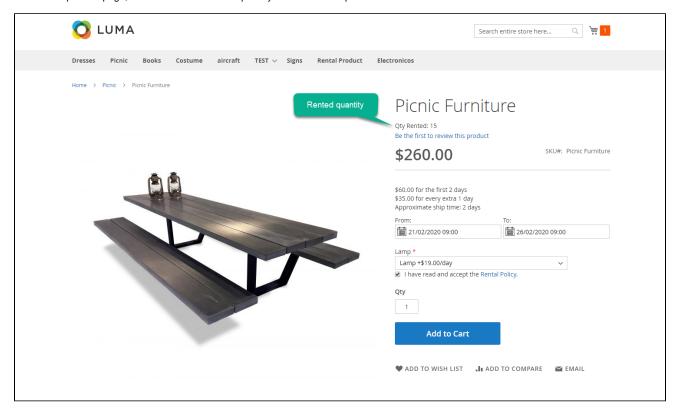
• To view the rental products report, on the admin sidebar, go to Reports > Magenest Rental Report > Products Report. On Products Report page, select the time of report then click on Refresh button, the report will display.



# Store front function

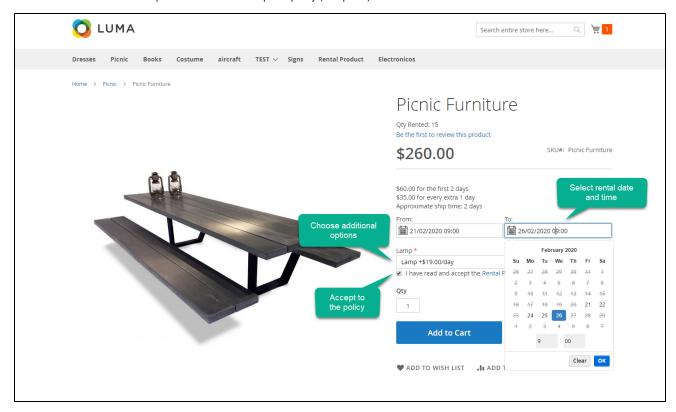
View rented quantity on product detail page

On the rental product page, customers can view the quantity of rents on that product.



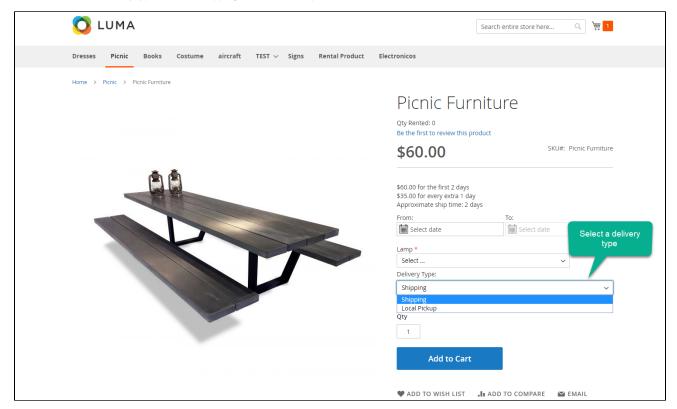
Select rental options and checkout

Customers can select additional options for rent then accept the policy (if required) to create a rental order.



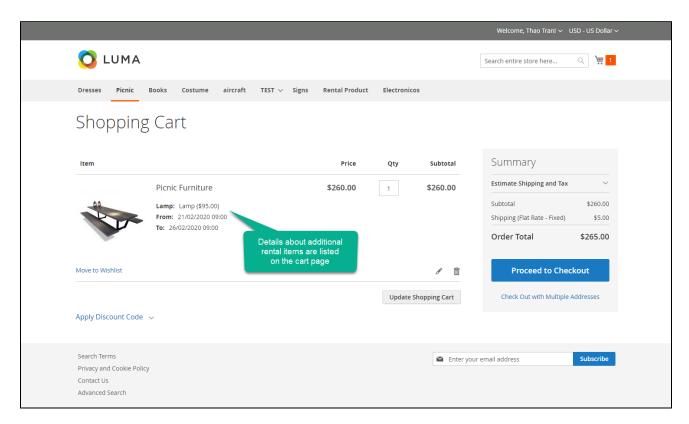
## Select delivery type

Customer can select delivery type between Shipping and Local Pickup.



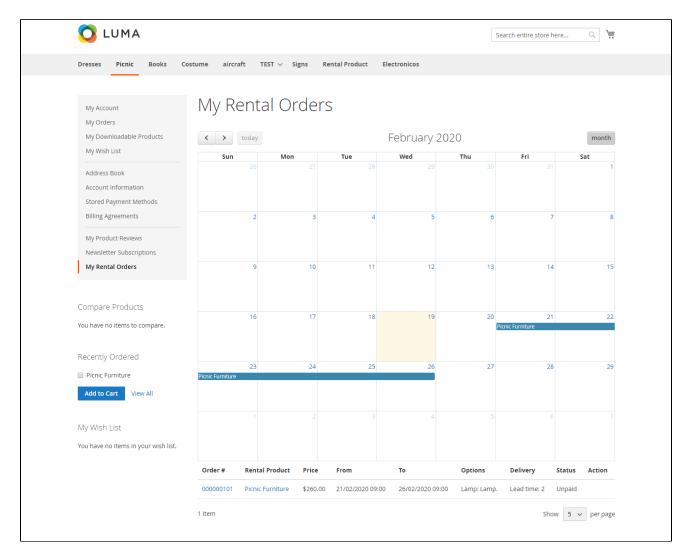
## View rent details

On the cart page, customers can view the rental order with details about the additional options and time period.



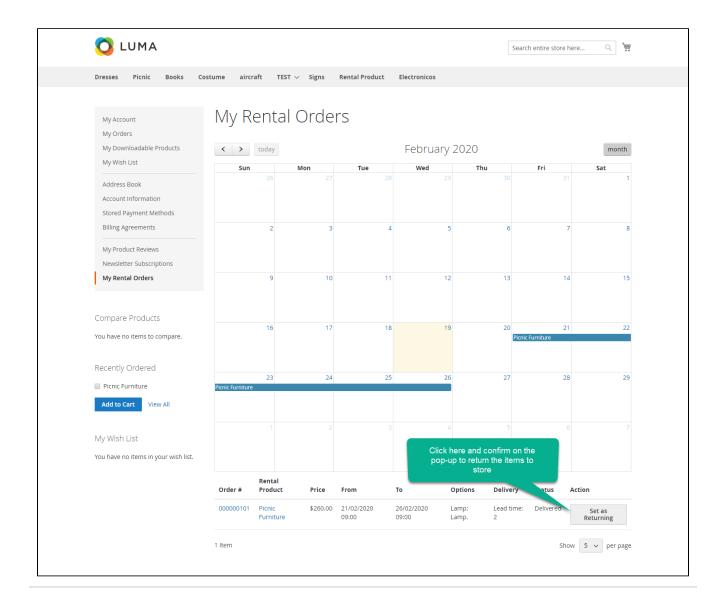
# View personal rented orders on grid or calendar

On My Account page, customers can view their own rented order on the grid or calendar depending on the back-end settings. Customer can track the rental order status.



# Two-way shipping for the rental items

After a rent duration, customers click on Set as Returning button to return the rental items. When the items back in the store, admin will confirm the return from the back-end by setting the order status to Complete.



# **Import & Export**

🚖 Rental products can be imported using default product import functionality of Magento (System > Import > Products).

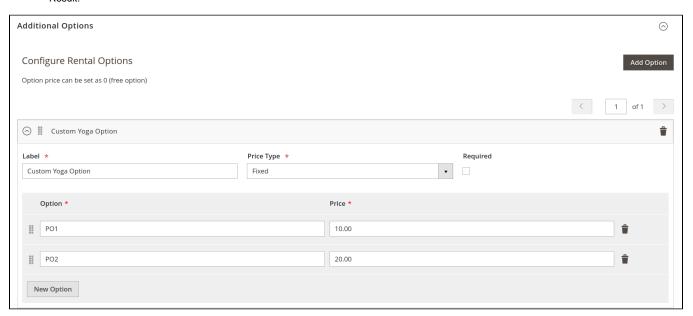
The following columns can be added to import CSV

- email\_template: string, code of email template. Default: rental\_email\_template
- delivery\_type: integer, one of:
  - 0 : shipping
  - o 1 : local pickup
  - o 2: both delivery methods
- lead\_time: integer, number of lead time days
- max\_duration: integer, maximum rent duration. Use 0 to use global configuration
- pickup\_address: string, local pickup address
- hold: int, hold qty
- base\_price: float, base rental price. Required field.
- base\_period: text, base rental block. Uses number+time\_unit format e.g. 2d for 2 days, 10h for 10 hours. Required field.
- additional\_price: float, additional block rental price.
- additional\_period: float, additional block. Uses number+time\_unit format.
- rental\_options: rental additional options, separated by "|" character. Each option includes 5 values:
  - Option title: text
  - Option type: per\_hour, per\_day or fixed
  - o Is Required: integer, 0 or 1
  - O Title: text, name of option
  - Price: float, price of option

Example: "Custom Yoga Option,per\_hour,0,PO1,10.00"

All options with the same option title, type and is required values form a rental option. Example:

- Import data: "Custom Yoga Option,fixed,0,PO1,10.00|Custom Yoga Option,fixed,0,PO2,20.00"
- Result:



Please refer to [module directory]/Sample/catalog\_product\_import.csv for sample import file.

Rental products can be exported from System > Export > Products. Exported CSV can be reused to import products.

# **Translation**

Translation for frontend phrases is supported. Please follow Magento's guide on the site below to translate to your own language https://devdocs.magento.com/guides/v2.3/frontend-dev-guide/translations/xlate.html
 Note that default US English i18n is provided under /i18n/en\_US.csv

# **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 within 2 business days.
- We will offer lifetime free update and 6-month 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 services 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.