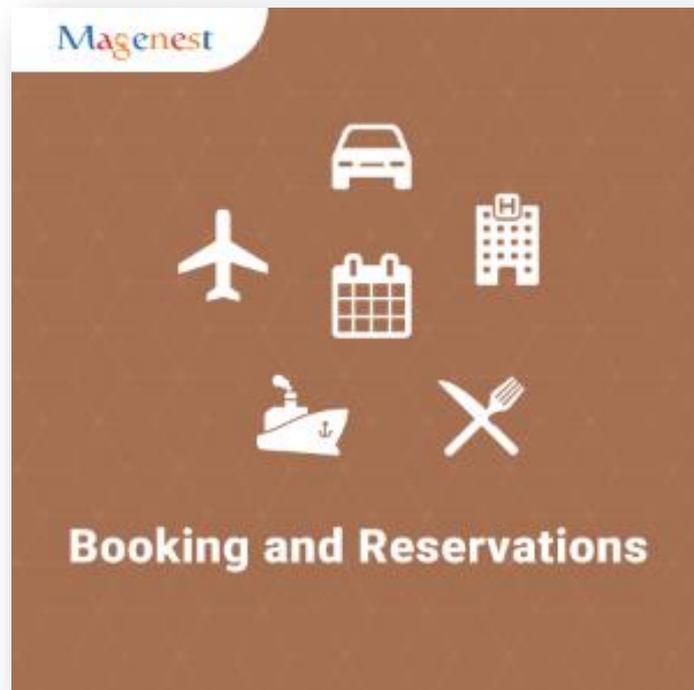


User Guide



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.

Created: 28/07/2016 | By:Magenest| Email: support@magenest.com

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1. Introduction

Booking and Reservations extension by Magenest simplifies things for your Magento 2 stores and clients. This extension not only make it easy for your customers to schedule or cancel request but also help you manage bookings, customers, staffs and products on both larger screens and mobile devices.

For more information, please visit: [Booking and Reservation](#)

1.1. Features For Admins

- A time slot cannot be placed by 2 or more different customers.
- Beautiful frontend.
- Responsive mobile.
- Allow admins to convert any products or new products to a reservation product.
- Create product schedule automatically related to staff user.
- Allow admins to choose one of four options (need staff or not, some hours in 1 day or full day) for a reservation product.
- Create staff rules, special date price rules, rush hour rules, early order rules in details (add/ sub amount/ percentage of money).
- Allow admins to manage all reservation orders, cancel request from customer list.
- Send an email to staff when customers make a reservation order.
- Admin can define default reservation status for newly ordered products.

1.2. Features For Customers

- Customers can review all reservation orders.
- Customers can send a cancel request to their reservation orders within a click.
- Customers can now add many staffs in many time intervals in frontend.
- Customers can steal reservation product from the other customer cart (who place order first will take that)

1.3. System Requirements

Your store should be running on Magento Community Edition version 2.1.

1.4. Document Online

- <http://www.confluence.izysync.com/display/DOC/2.+Booking+and+Reservation+Use+r+Guides>

1.5. Our Policies

- Privacy Policy: <http://store.magenest.com/privacy-policy>
- Customer Service: <http://store.magenest.com/customer-service>

2. Configuration

2.1. General Configuration

In order to get your extension up and running properly, we highly recommend that you make some configurations right from the beginning

Firstly, go to **Backend of Magento 2 stores > Stores > Configuration > Marketing > Email Templates**, to set email template for your Magento 2 stores.

Then navigate to **Stores > Configuration** this is the place where you define the email template and sender identification of the email sent each time the reservation status of a reservation order is changed.

- **Default Order Status:** specify the default status of newly placed reservation orders.
- **Email Sender:** specify the identification of the sender. You can define this in tab **General > Store Email Addresses**.

The screenshot shows the Magenest configuration interface. The 'Configuration' menu is circled in green. The 'MAGENEST' menu item is highlighted with a red box, and its sub-item 'Booking And Reservation Configuration' is also highlighted. The 'Order Configuration' section is circled in green. The 'Cancel Request Configuration' section shows a field for 'The maximum number of days customer can cancel order' set to 4.

- **Template Configuration:** these are email templates for each reservation status of an order.
- **Here are some template variables that you can embed in your template:**

+ *Staff:*

CustomerEmail: customer email

CustomerName: customer name

Store: store name

ItemName: name of the ordered item

ReservationStatus: reservation status of the item

Event: will be available if there is any special date, time activities (rush hour, pre-order)

Date: reservation date

Start: start time

End: end time

+ *Customer:*

CustomerEmail: customer email

CustomerName: customer name

Store: store name

ItemName: name of the ordered item

ReservationStatus: new booking status of the item

Event: will be available if there is any special date, time activities (rush hour, pre-order)

Date: reservation date

Start: start time

End: end time

StaffName: staff name

Template Configuration

Send Email To Staff Automatically [global] No
 Enable or disable send email to staff when order status change

Confirmed [global] New Order
 Select email template for confirmed orders

Unconfirmed [global] New Order
 Select email template for unconfirmed orders

Cancelled [global] New Order
 Select email template for cancelled orders

Send Email To Customer Automatically [global] No
 Enable or disable send email to customer when order status change

Confirmed [global] New Order
 Select email template for confirmed orders

Unconfirmed [global] New Order
 Select email template for unconfirmed orders

Cancelled [global] New Order
 Select email template for cancelled orders

- **Cancel Request Configuration:** admins can set the maximum number of days customer can cancel the order or not. This is not mandatory.

Cancel Request Configuration

The maximum number of days customer can cancel order [global]

Define the maximum number of days customer can cancel order

The number of days customer can cancel

2.2. Price Rules

We have implemented 3 kinds of price rules: **Staff Price Rules**, **Special Date Price Rules** and **Reservation Price Rules**. These rules will add some versatility to the effort of the better-evaluating price of the reservation. With Staff Price Rules, go to **Staff Price Rules** tab in **Reservation** menu.

Staff Price Rules

Add New Staff Rule

✓ Rule has been saved.

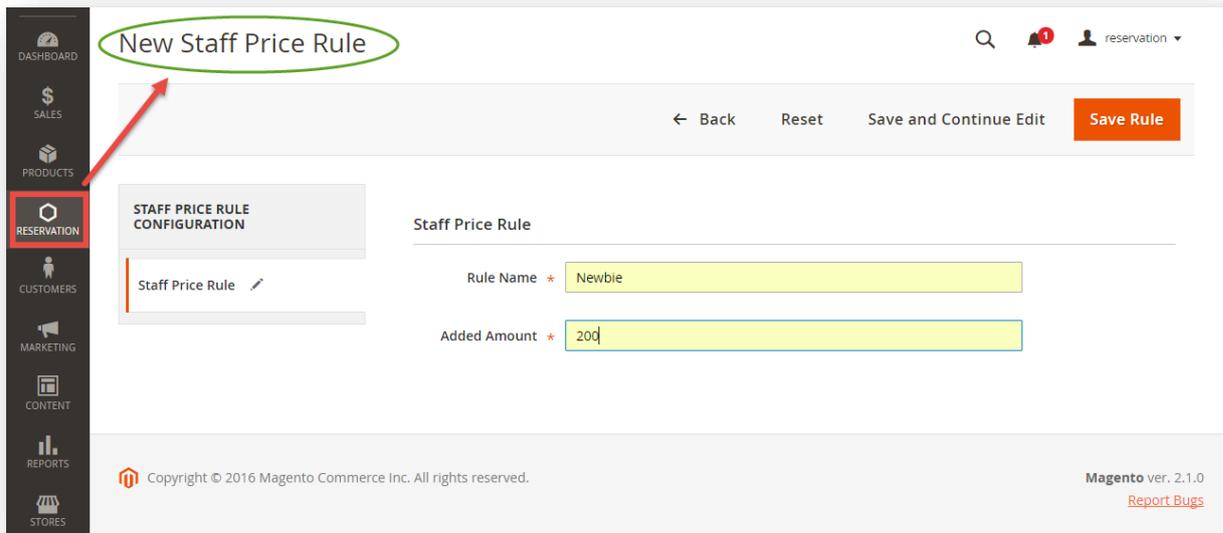
Search by keyword

Filters Default View Columns Export

20 per page 1 of 1

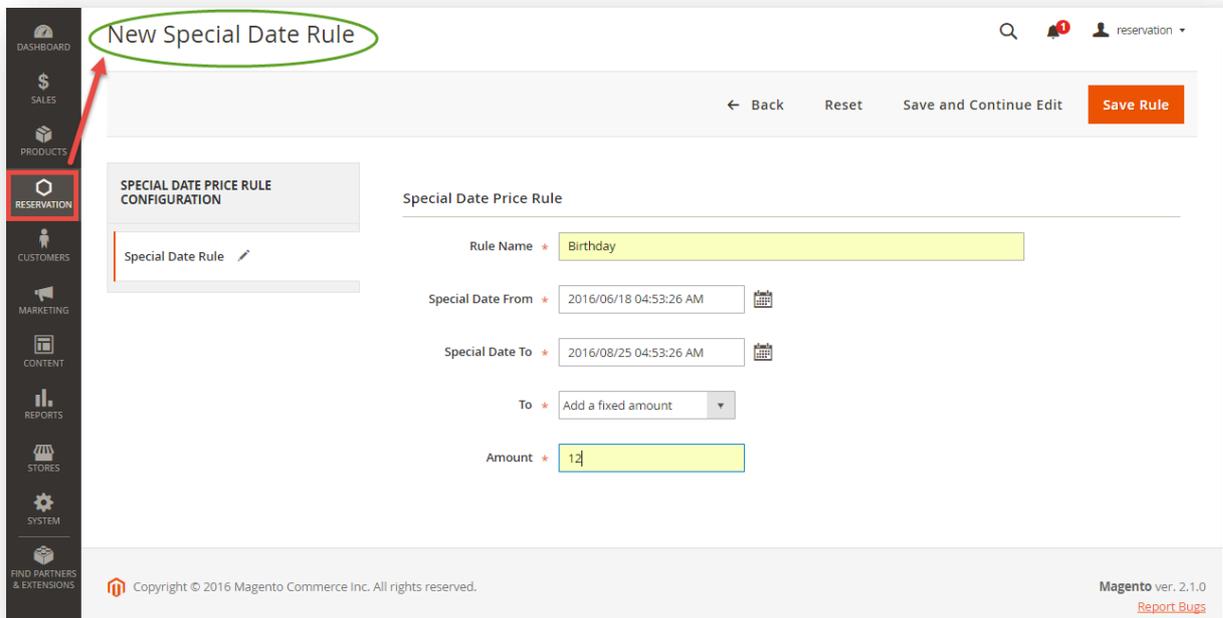
	Staff Price Rule Name	Staff Rule Amount	Action
<input type="checkbox"/>	Newbie	20.00	Edit
<input type="checkbox"/>	Professor	500.00	Edit

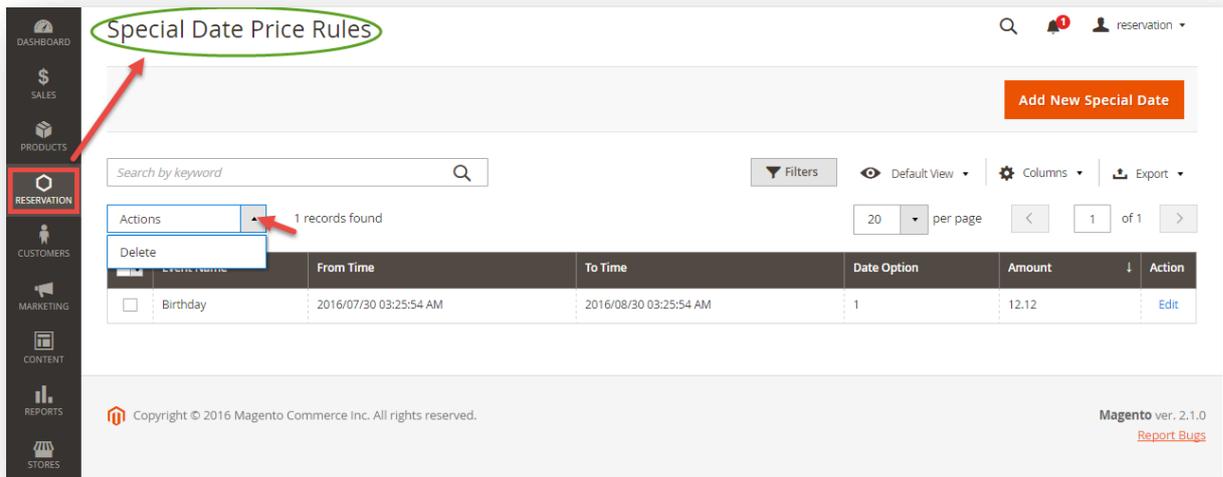
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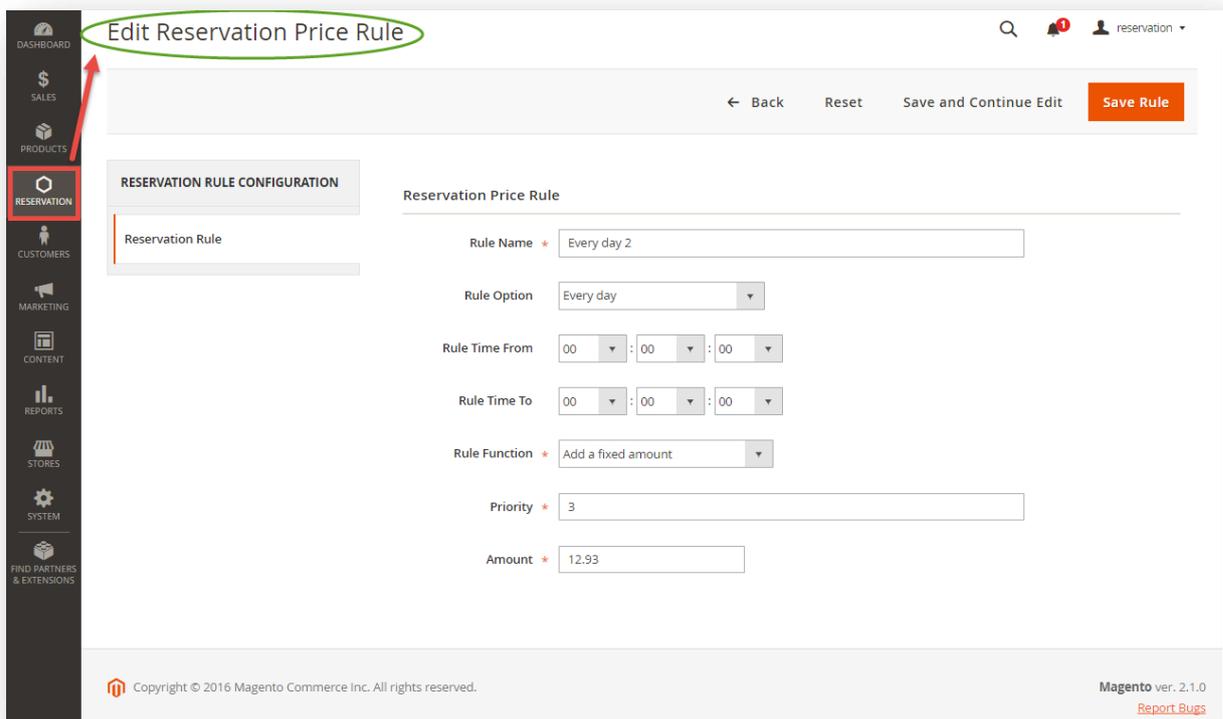
Then we have **Special Date Amount**, which will add or subtract a certain amount of money when a certain date is selected.

Rule Amount is defined so that if a staff of one type is selected on frontend by the customer, a corresponding amount will be added to the total.

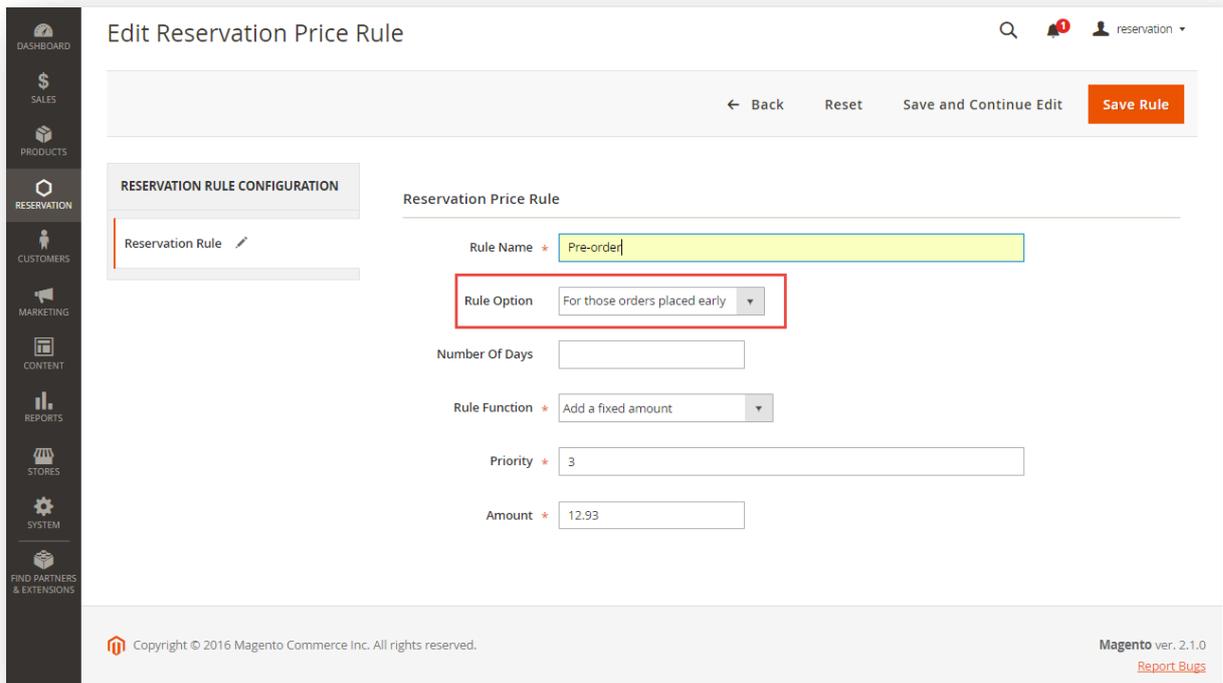




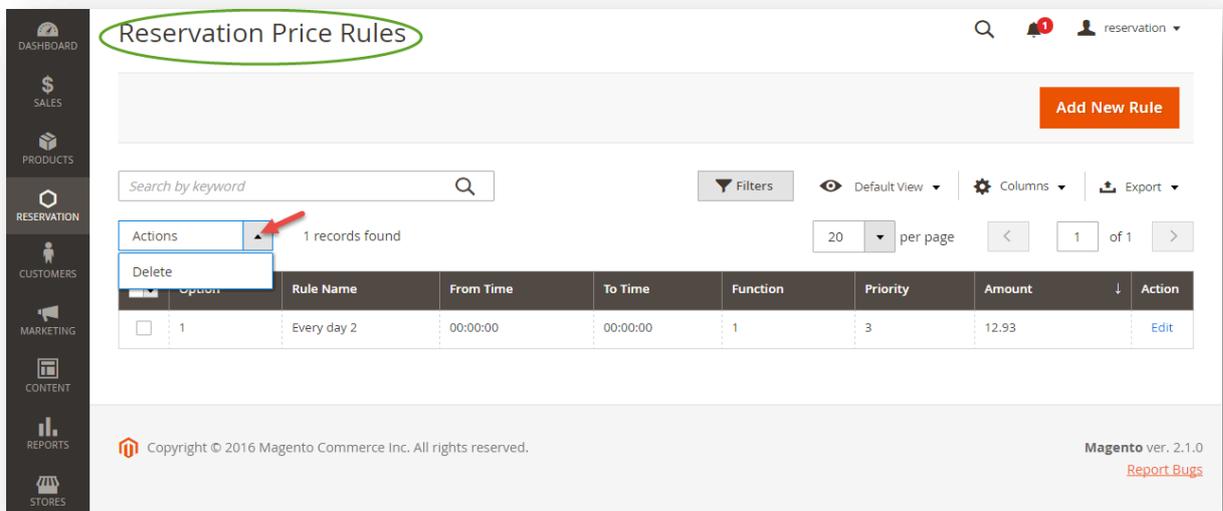
Another price rules - **Reservation Price Rules** allows admins to create reservation price rules for Time Activity such as every day, every week, every month, every year.



Especially, admins can set pre-order for Reservation Price Rule.



Admins can view or delete **Reservation Price Rules**.



3. Main Features

3.1. Define Staff Information

Go to **Backend of Magento 2 store > System > All Users > Add New User** button to add staff into stores.

The screenshot shows the 'Add New User' form in the Magento 2 Admin Backend. The user being added is 'Scarlett Honor'. The form is divided into two main sections: 'Account Information' and 'Current User Identity Verification'. The 'Account Information' section includes fields for 'User Name', 'First Name', 'Last Name', 'Email', 'New Password', and 'Password Confirmation'. The 'Current User Identity Verification' section includes a 'Your Password' field. The 'SYSTEM' menu item in the left sidebar is highlighted with a red box. The 'USER INFORMATION' tab in the top navigation is also highlighted with a green circle. A red box highlights the 'User Info' option in the left sidebar. A callout bubble points to the 'New Password' field with the text 'Reconfirm password when you make any changes'. The 'Save User' button is located in the top right corner.

Scarlett Honor

← Back Delete User Reset Force Sign-In Save User

USER INFORMATION

Work Schedule

Staff Information

Staff Orders

User Info

User Role

Account Information

User Name * Scarlett

First Name * Scarlett

Last Name * Honor

Email * scarlettbk1212@gmail.com

New Password

Password Confirmation

Interface Locale English (United States) / English (United States)

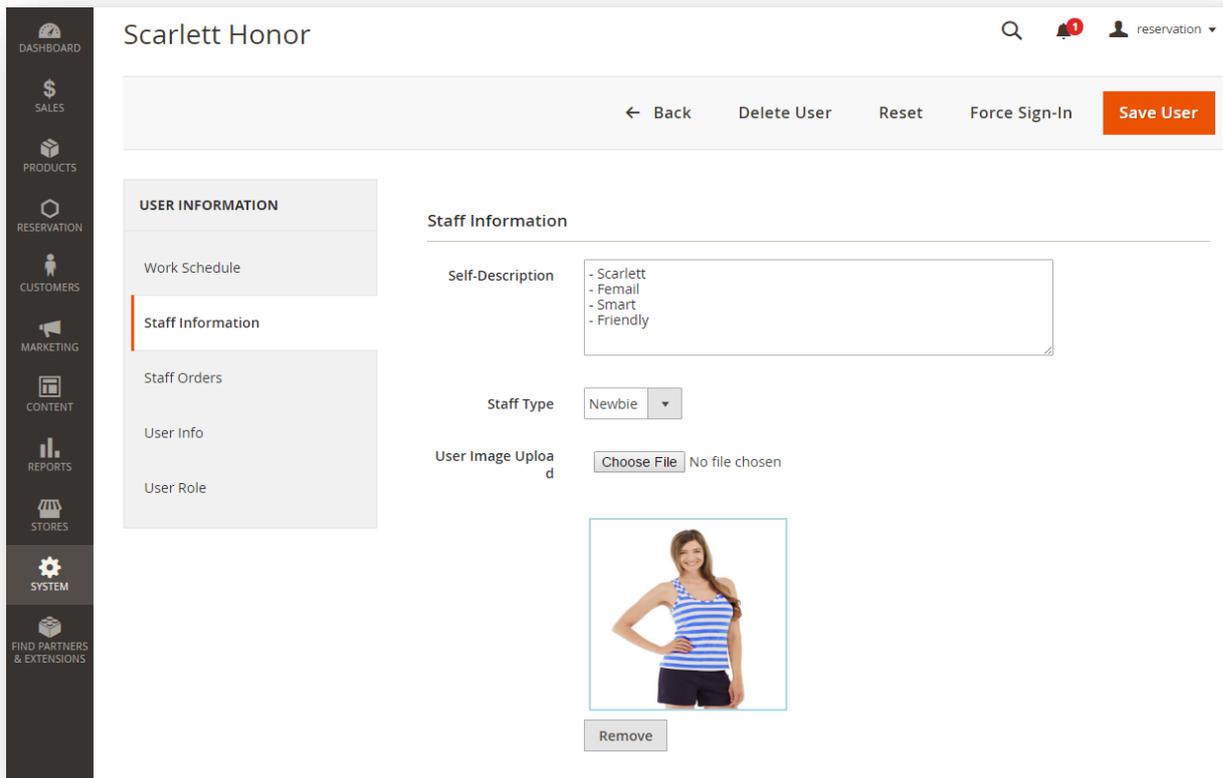
This account is Active

Current User Identity Verification

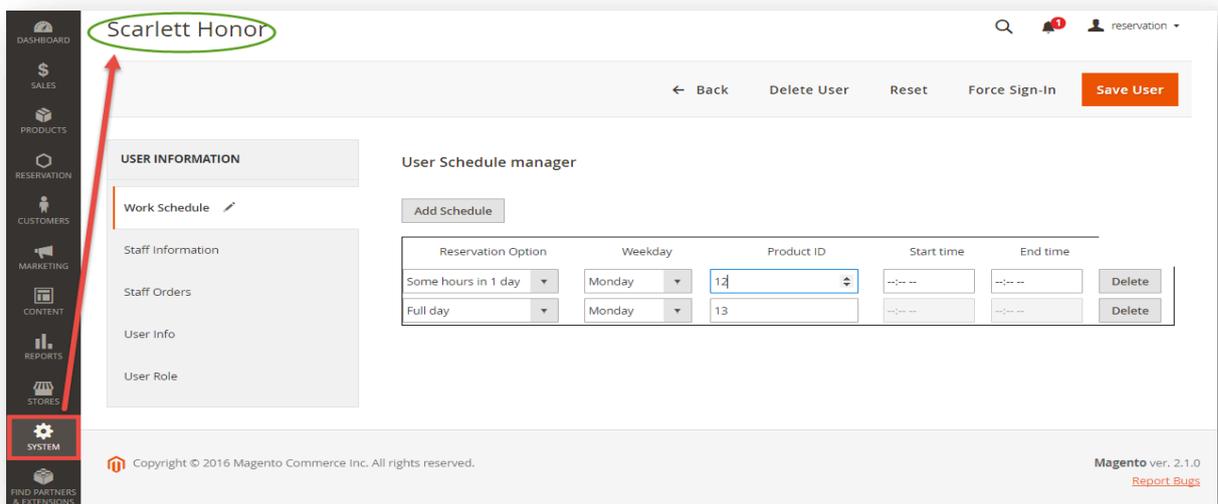
Your Password *

Reconfirm password when you make any changes

At **Staff Management** tab, you will be taken to the users list. From now on, you will be able to make an admin user a staff. In detail, you can add some information of the staff as below.



You can also add **Work Schedule** for the staff. This is nearly identical to the discussed product schedule.



Lastly, the user can view booked orders in which the staff has been chosen.

Scarlett Honor

← Back Delete User Reset Force Sign-In Save User

Search by keyword Filters Default View Columns Export

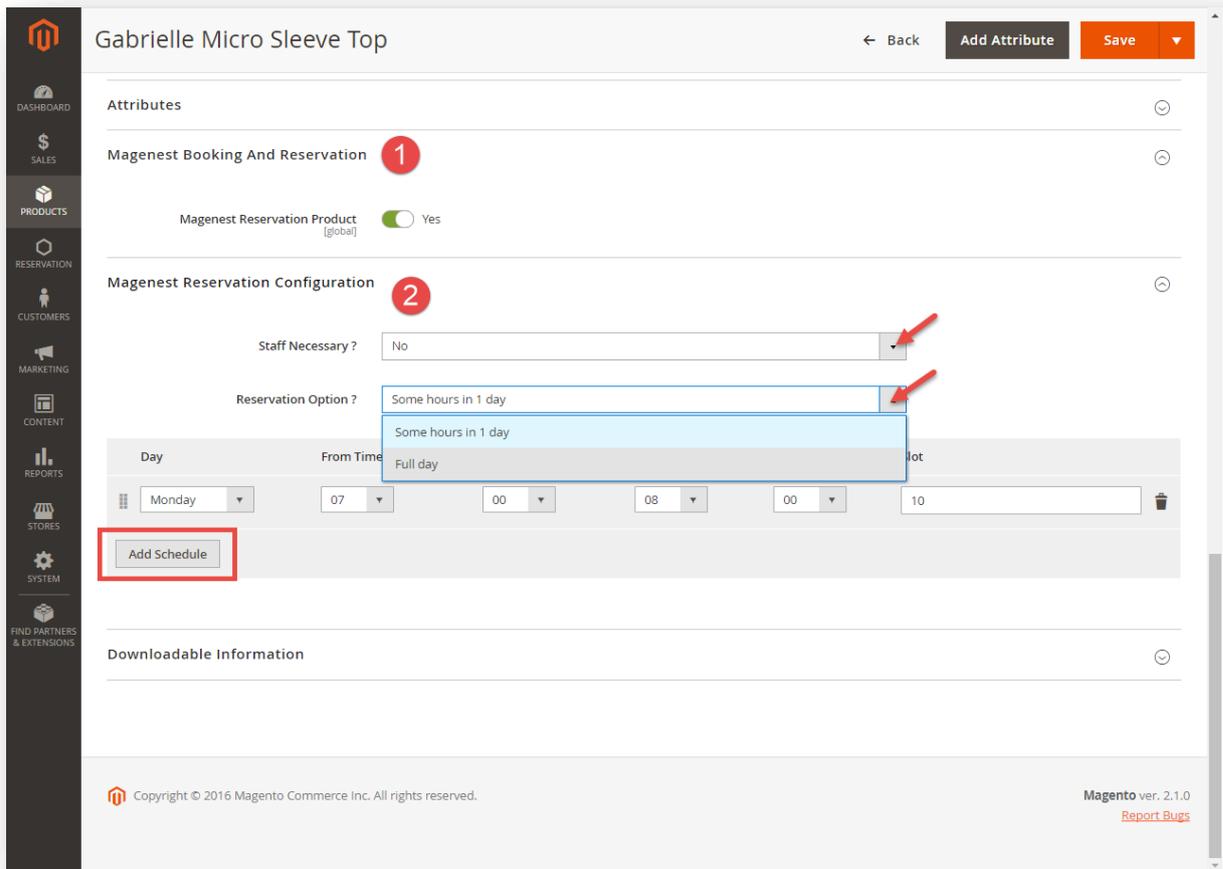
1 records found 20 per page 1 of 1

Order Id	Product Name	Customer Name	Status	Reservation Date	Event	From Time	To Time	Slots	Staff Name ↓	Action
9	Atomic Endurance Running Tee (Crew-Neck)	Scarlett Honor	pending	2016/08/22	Birthday	00:00	23:59	1	Scarlett Honor	View

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3.2. Usage Procedure

With our Booking and Reservation extension, admins have the ability of setting reservation products for any products including existed products. To create a reservation product, admins just choose yes or no in Magenest **Booking And Reservation** tab. Then click on Magenest **Reservation Configuration** tab to confix reservation products if choose yes.



When a customer is on a frontend detail page of a product of type Booking and Reservation, he will be able to select a date with a date picker input field as shown.

The screenshot shows the LUMA website interface. At the top left is the LUMA logo. A navigation menu contains 'Sale', 'Training', 'Women', and 'Booking and Reservation'. A search bar is located at the top right. The breadcrumb trail reads 'Home > Gabrielle Micro Sleeve Top'. The product image shows a woman wearing a green V-neck top and black shorts. To the right of the image, the product title 'Gabrielle Micro Sleeve Top' is displayed, along with the price '\$12.00' and the status 'IN STOCK'. Below the product information, there is a date selection widget with a calendar for July 2016. The calendar table is as follows:

WK	SUN	MON	TUE	WED	THU	FRI	SAT
25						1	2
26	3	4	5	6	7	8	9
27	10	11	12	13	14	15	16
28	17	18	19	20	21	22	23
29	24	25	26	27	28	29	30
30	31						

Below the calendar, there are 'Go Today' and 'Close' buttons. To the right of the calendar, there is a 'SHARE' button and an 'EMAIL' button with an envelope icon.

When a day is selected, the system will check if there are any product schedules available that day and display them. It will also check if the selected day is within a special date range as formerly specified. Then if a schedule is selected, the system will now check the staff with the corresponding schedule. Some information about the staff will also be displayed.

Mon, 25 Jul 2016

Some hours in 1 days

Have staff in this products

1

2

3

Product Schedule

- From 07:00 To 08:00
- From 08:00 To 09:00
- From 09:00 To 10:00**
- From 10:00 To 11:00
- From 11:00 To 12:00
- From 13:00 To 14:00
- From 14:00 To 15:00
- From 15:00 To 16:00

Staff List

Staff Introduction
3 years experiment

This Service Price
\$31.88

Add To Cart

Your Cart

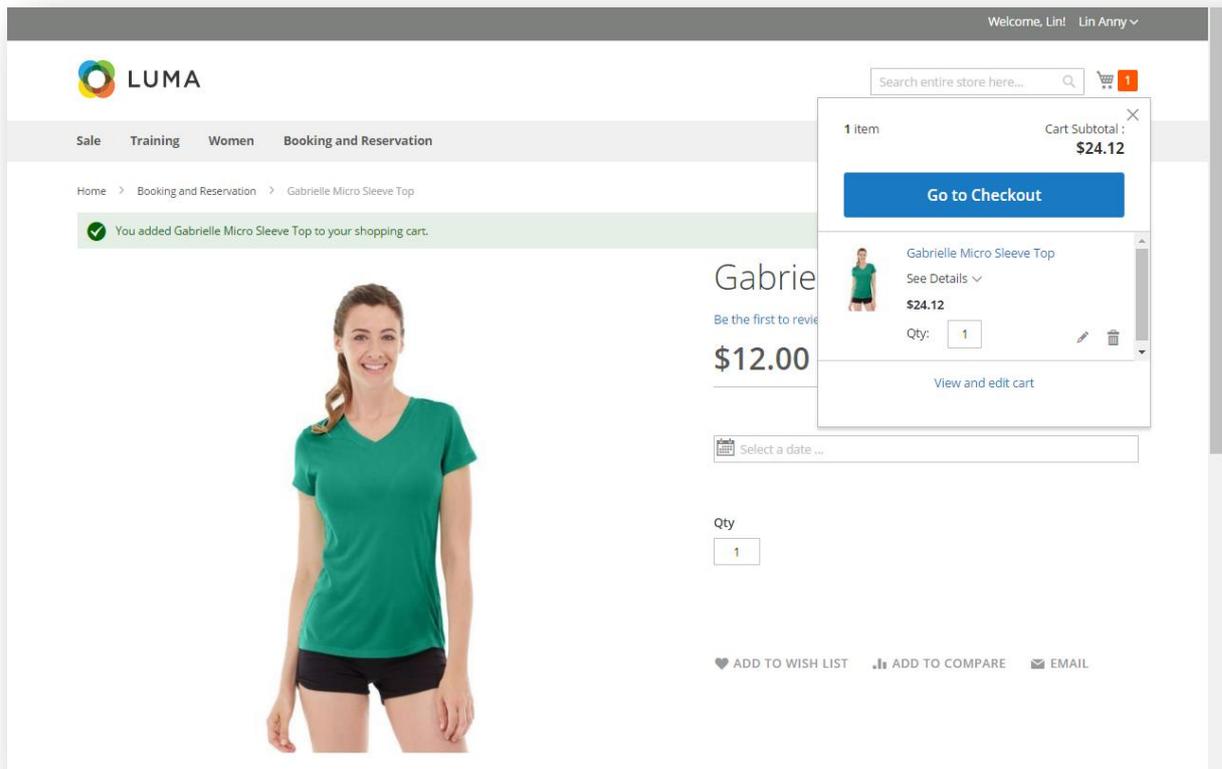
- From 07:00 To 08:00
staff1 staff1 - \$31.88
- From 08:00 To 09:00
staff2 staff2 - \$31.88
- From 09:00 To 10:00
staff1 staff1 - \$31.88

Cancel Save Selection

If the products do not include staff, customers need to choose only schedule then click on **Add To Cart** button > **Save Selection**.

The screenshot displays the 'Reservation' interface. On the left, a calendar for August 2016 is shown with a 'Full day' callout pointing to the 30th. A red circle '1' is next to the calendar. In the center, event details for '30/8/2016' are shown, including 'Event: gold week, Early order', 'Maximum Number Of Slots: 13', and 'Service Price: USD123.14'. A red circle '2' is next to the service price. An orange callout box says 'Have no staff in this products' pointing to the event details. Below the price is an 'Add To Cart' button. On the right, a 'Your Cart' section lists two items: '10/8/2016' (3 slots - USD369.42) and '30/8/2016' (4 slots - USD492.56). A red circle '3' is at the bottom right of the main reservation area. At the bottom of the window are 'Cancel' and 'Save Selection' buttons.

Then when the customer adds the product to cart, he will be able to view the product.



When the order is successfully placed, this is what it will look like on **My Orders** page in customer's **My Account**.

Welcome, Scarlett! Scarlett Honor

LUMA Search entire store here...

Sale Training Women **Booking and Reservation**

My Booking And Reservation
 Account Dashboard
 Account Information
 Address Book
 My Downloadable Products
My Orders
 Newsletter Subscriptions
 My Credit Cards
 My Product Reviews
 Billing Agreements
 My Wish List

Order # 000000017 PENDING

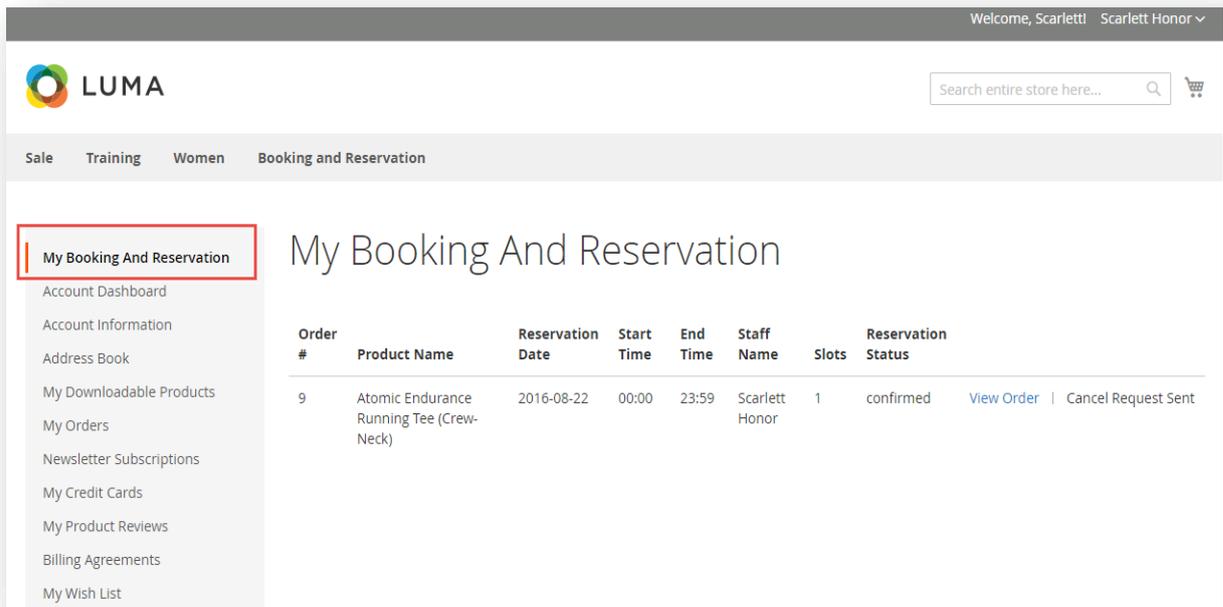
July 28, 2016

Reorder Print Order

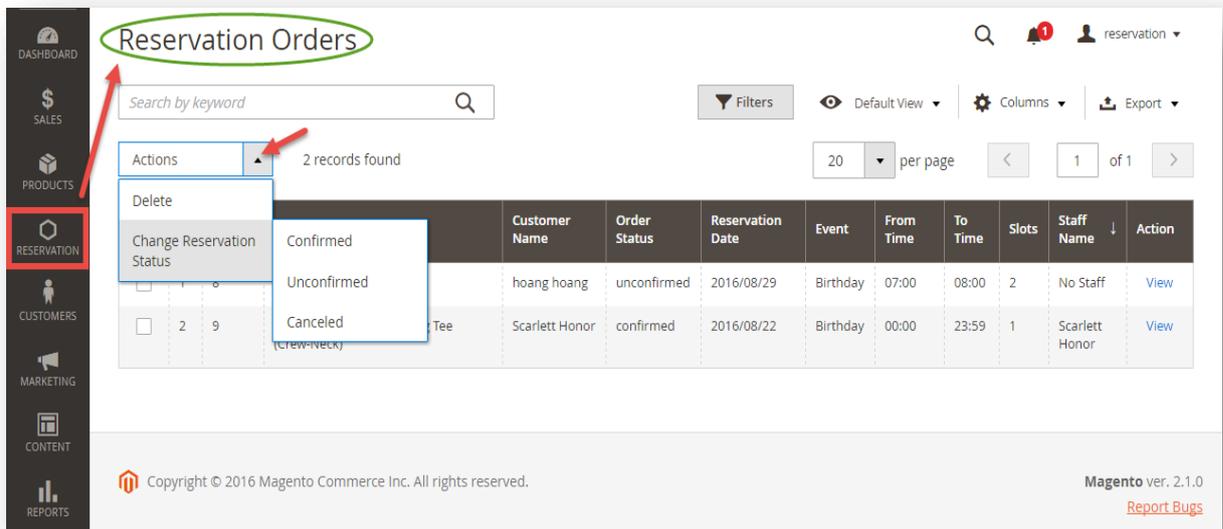
Product Name	SKU	Price	Qty	Subtotal
Atomic Endurance Running Tee (Crew-Neck)	Atomic Endurance Running Tee (Crew-Neck)	\$33.12	Ordered: 1	\$33.12
Reservation Option Full day with staff				
2016/08/22 Birthday 4 Scarlett Honor USD33.12				
			Subtotal	\$33.12
			Shipping & Handling	\$5.00
			Grand Total	\$38.12

Compare Products
 You have no items to compare.

For easier management overbooked reservation, the customer can also check the **My Booking and Reservation** tab.

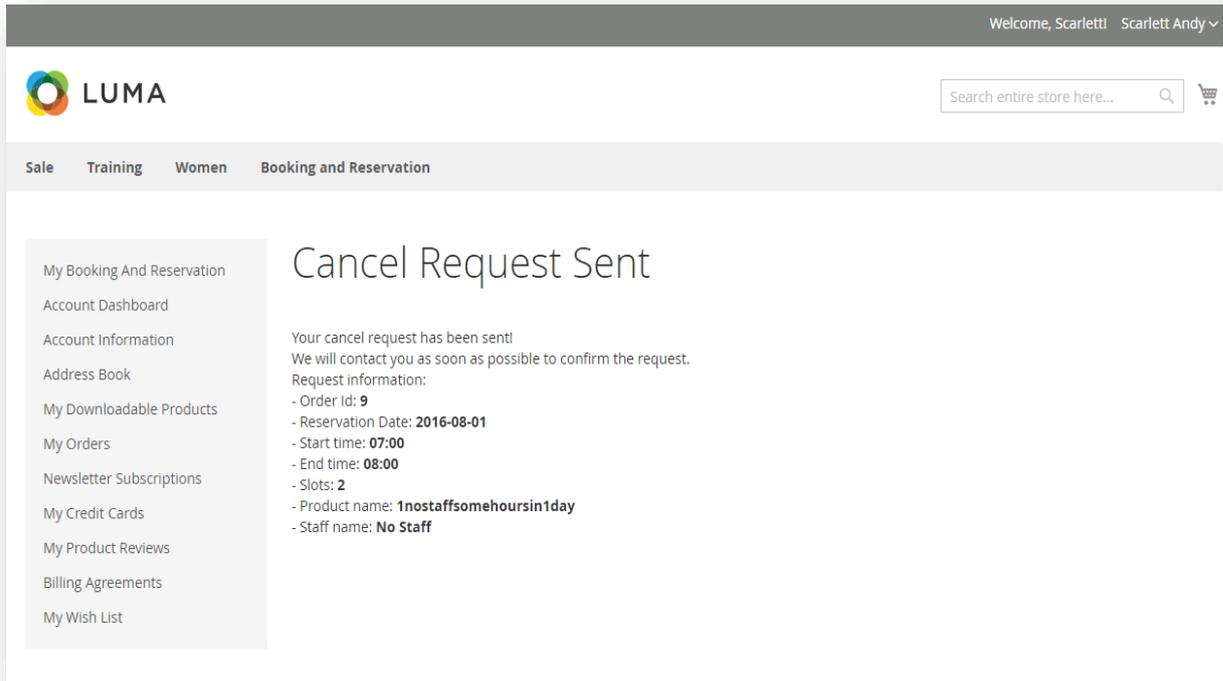


From admin's perspective, he can view all booked reservation in **Reservation Orders**.



3.3. Cancel Requests

Once the reservation has been booked but the customer changed his mind, he can send a cancel request to the admin. He needs to go to **My Booking and Reservation** tab in **My Account**. Besides **View** and **Reorder** button, there will be **Request Cancel** buttons that once clicked, a request will be sent to the admin and an email will be sent to customers immediately.



Welcome, Scarlett! Scarlett Andy

LUMA

Sale Training Women Booking and Reservation

My Booking And Reservation

- Account Dashboard
- Account Information
- Address Book
- My Downloadable Products
- My Orders
- Newsletter Subscriptions
- My Credit Cards
- My Product Reviews
- Billing Agreements
- My Wish List

Order #	Product Name	Reservation Date	Start Time	End Time	Staff Name	Slots	Reservation Status	
8	4needstafffullday	2016-07-27	00:00	23:59	staff2 staff2	1	canceled	View Order Request Cancel
9	1nostaffsomehoursin1day	2016-08-01	07:00	08:00	No Staff	2	confirmed	View Order Cancel Request Sent
8	3needstaffsomehoursin1day	2016-08-01	09:00	10:00	staff2 staff2	1	canceled	View Order Request Cancel
8	3needstaffsomehoursin1day	2016-08-01	08:00	09:00	staff1 staff1	1	canceled	View Order Request Cancel

On backend side, go to **Cancel Requests** tab, the admin can see the cancel requests.

Cancel Requests

Search by keyword

Filters Default View Columns Export

20 per page 1 of 1

	Product Name	Customer Name	Order Status	Reservation Date	From Time	To Time	Slots	Staff Name	Action
<input type="checkbox"/>	Atomic Endurance Running Tee (Crew-Neck)	Scarlett Honor	pending	2016/08/22	00:00	23:59	1	Scarlett Honor	View

Actions: Delete, Cancel Schedule

Delete only 1 cancel request

Cancel all of cancel request

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4. 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.

5. 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.

[Magenest](#)

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