

# Erez2

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**AUTO RENTAL SYSTEMS**



# Erez2 Version 4.0 Setup Guide

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## Overview

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This document describes the process of setting up Erez2 version 4.0. This version ships with RentWorks Version 4. The setup instructions are based on an installation where Bluebird Auto Rental Systems is hosting the Erez2 web site.

The first part covers installation and configuration of the WebSpeed Transaction Server. The second part details the settings in RentWorks that affect Erez2, and finally reports and alerts are covered.

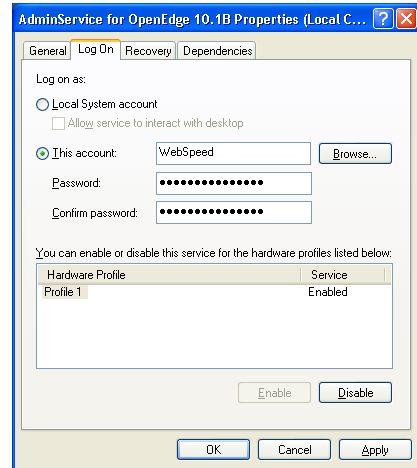
## Setting Up WebSpeed

Erez2 requires Progress 10.1B service pack 3 or higher with the OpenEdge Application Server and Query Results licenses installed.

### Configure the Progress AdminServer

Go into *Control Panel – Services* and double-click ‘AdminService for OpenEdge 10.1B’.

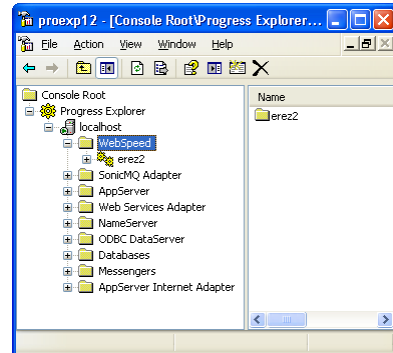
The Startup Type should be Automatic, and the Log On Account should be set to something other than the System Account. The best thing to do is to create a new account just for the Admin Server. If the WebSpeed transaction agents should happen to lock up, you can use this login to kill off the tasks. But if the AdminService is set to the System Account, you will have to reboot. The ‘standard’ account is “WebSpeed” with the password “killagent”.



Now start the service.

### Configure the WebSpeed Broker

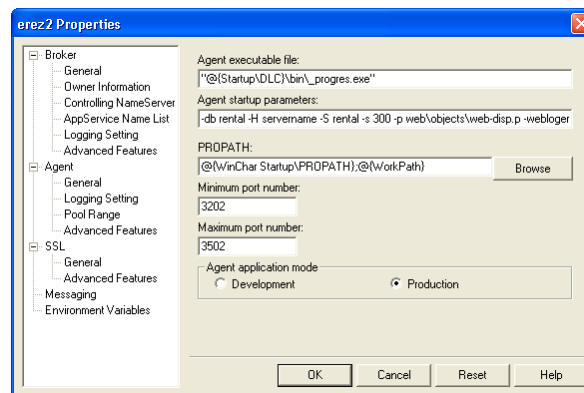
Go into the Progress Explorer. If a server doesn’t already exist, create one. Under the WebSpeed folder, create a new service named ‘erez2’. The default directory should be the RentWorks directory.



On the Broker General page, set the Working Directory to the RentWorks directory.

The Agent Startup Parameters should have the `-db`, `-H`, and `-S` parameters before the `-p`. You don’t have to include the `-N` parameter. The stack (`-s`) parameter needs to be 300.

Under Logging Settings, change the Broker and Agent log filenames to `\RentWorks\logs\erez2broker.log` and `\RentWorks\logs\erez2server.log`. If a ‘logs’ directory doesn’t exist in the RentWorks directory, create it before saving your settings.



Now start the Erez2 Broker. Either click on the toolbar’s Start icon or right-click on the service and choose “Start”.

## Erez2 Program File Setup

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### Update the Progress Include Files

Several Progress files are needed when compiling Erez2 programs. Unfortunately these files are unencrypted source code that cannot be used on a run-time license. To work around this situation, unzip the `erez2srcweb101B.zip` file into `dlc\src\web\method`. The files contained in the zip file are encrypted versions of the Progress files.

### Compile the RentWorks Programs

Go into the Application Compiler and compile all of the programs in `server\web`. Also, compile the Erez2 report files: `server\rpt\rpterez*.p`. Some of these may not have compiled originally because of the raw source Progress files described above.

## Web Server Setup

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The web server is the machine that will handle incoming web page requests from the Internet. If Bluebird is hosting the pages, this is the NetRent2 machine. Otherwise, the customer must have a machine with WebSpeed Messenger installed on it.

### Create an Images Directory

The Erez2 images are located on the host server in a directory called “erezimg”. This can be created in the *inetpub\wwwroot* directory, or a virtual directory can be created to point to the image directory located somewhere else on the system:

Go into Microsoft Internet Information Server. Create a virtual directory under the website called ‘erezimg’ that points to the ‘images’ directory. The permissions should be set to allow read access and script access.

**NOTE:** Since there are multiple image directories on the NetRent2 host server (one for each customer), the directory names must all be different. The Erez2 web pages must be changed to reflect the actual directory name. Use Notepad to change all occurrences of “/erezimg/” to the actual directory name that is used. If the customer has a dedicated web server, this is not necessary.

### Unzip the Images

Unzip the ‘erez2img.zip’ file into the images directory created above. The button and sample vehicle images, as well as some other files will be put in the directory.

### Create an Connection Script

When an Internet user connects to the Erez2 host server, a script is used to point WebSpeed Messenger to the proper RentWorks2 database server. In the *inetpub\scripts* directory are several .wsc files for each customer using Erez2. Copy and rename one of these files. Open the new file in NotePad. Most of the text in it will be comments. The last line is the only thing that needs to be changed. It consists of the database server’s IP address followed by the Transaction Server port (usually 3050, but it can be changed in the WebSpeed Erez2 service on the database server).

## Web Server Setup *(continued)*

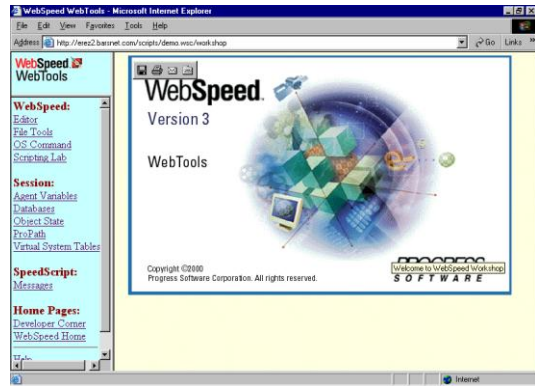
### Compile the Web Pages

Go to this URL, replacing *script.wsc* with the name of the customer's connection script:

<http://erez2.barsnet.com/scripts/script.wsc/workshop>

If everything is set up properly, the WebSpeed Workshop page should appear.

On the left side of the page, under "WebSpeed", click on "File Tools". You should see a listing of the RentWorks directory. Click on the Web subfolder and the Erez2 HTML pages should appear in the list. Choose all of the files and click on the Compile button. The programs should compile with no errors.

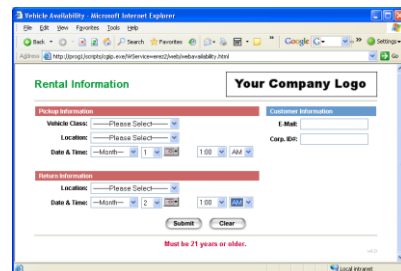


### Try Out Erez2

Go to this URL, replacing *script.wsc* with the name of the customer's connection script:

<http://erez2.barsnet.com/scripts/script.wsc/web/webavailability.html>

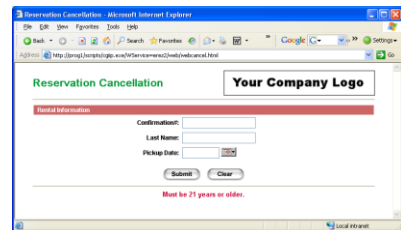
The main Erez2 page should appear.



Use this URL for the reservation cancellation page:

<http://erez2.barsnet.com/scripts/script.wsc/web/webcancel.html>

The customer can add this link to their web site if they want to allow Internet users to cancel reservations.



If either of these pages is not displayed properly, refer to the "Troubleshooting Erez2" document.

## Configuring RentWorks for Erez2

### Feature Code

Obtain a feature code for Erez2 and add it into RentWorks by choosing **Settings – Security – Security Feature Codes**. Re-spawn License Manager to validate the feature code. Without a validated feature code, most of the Erez2 settings will be disabled.

### Erez2 Settings

Go into Settings – Erez2 Settings.

The **General** page has the following settings:

**ID:** A unique identifier for use with multiple Erez2 page sets (via unique wsc files). If you are not using multiple Erez2 sites, leave this blank.

**Locations/Classes:** The selected locations and classes will be shown in the combo boxes on the Erez2 site. If you are not using multiple Erez2 sites, this field has no effect.

**Time Increments:** The Time combo boxes on the first web page can be set to list times by the hour, half-hour, or quarter-hour.

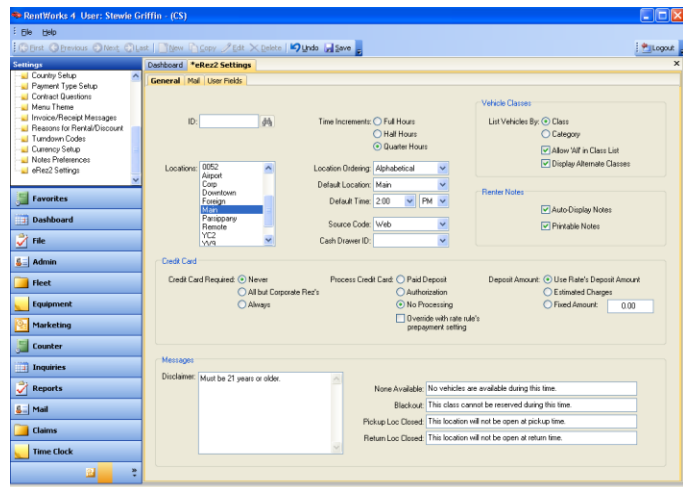
**Location Ordering:** The combo boxes on the Erez2 screens will have the locations ordered according to this setting, such as in alphabetical order, grouped by state, etc.

**Default Location:** The Location combo box can be set to show a specific location when first starting Erez2. If this field is left blank, “---Please Select---“ will be shown.

**Default Time:** A default time can be selected to show in the time fields when first starting Erez2.

**Source Code:** The source code that is used on each reservation that is created by Erez2.

**Cash Drawer ID:** When a payment is created, it will be assigned to the cash drawer specified here.



## **Configuring RentWorks for Erez2** *(continued)*

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### **“Vehicles” Section**

*List Vehicles By:* The Class combo box can be set to list classes or categories. If categories are listed, availability will be checked for all classes in the chosen category.

*Allow “All” in Class List:* Includes an ‘All’ option in the Class combo box. Since the availability check is a large calculation, turning this option off may improve system performance.

*Display Alternate Classes:* When vehicles are listed by class and the user selects a specific class (not “All” in the class combo box), the alternate classes will be shown as upgrades below the selected class. If any of the alternate classes are unavailable, they will not be shown.

### **“Renter Notes” Section**

These settings refer to the Notes box in Erez2. When the user enters text in the field, a renter note is attached to the reservation.

*Auto-Display Notes:* The note will automatically pop-up when the reservation is viewed.

*Printable Notes:* The note will be printed on reports and receipts.

### **“Credit Card” Section**

*Credit Card Required:* Credit card validation can be set to check every reservation, never check, or just check non-corporate reservations. If a valid A/R number has been entered in the Corp ID field, it is considered a corporate reservation.

*Process Credit Card:* If you are using CCPro, the Internet user’s credit card can be processed. You can get a paid deposit from the card, an authorization from the card, or skip processing. Choosing “Override with rate rule’s prepayment setting” will use the prepayment setting on the T&M rate’s rule.

*Deposit Amount:* When processing credit cards, the amount applied to the card can be the rate’s required deposit amount, the total estimated charges for the reservation, or a fixed amount.

## Configuring RentWorks for Erez2 *(continued)*

### “Messages” Section

*Disclaimer:* Text that is displayed on the main Erez2 page.

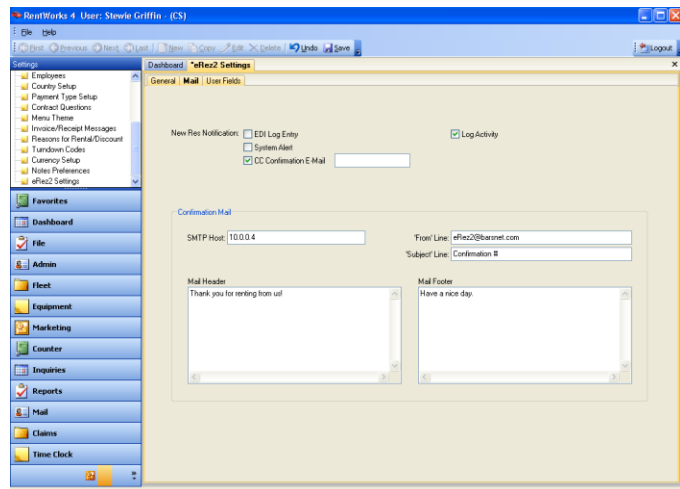
*Messages:* The messages that Erez2 displays can be customized. Change the text for each message in these fields.

### Mail Tab

The **Mail** screen has settings to control the confirmation e-mail delivery:

*New Res Notification:* When a new reservation is created, you can be alerted in three ways: with an EDI log entry, a system alert, or an e-mail to an external mail account. Check off the boxes for the notifications you wish to receive.

*Log Activity:* If this box is checked, Erez2 will log certain actions such as starting Erez2, checking availability, etc. Running the Erez2 Activity Report will analyze this log.



*SMTP Host:* The IP address or name of the server that the e-mails will be sent through.

**NOTE:** This value overrides the server address in the *cfg/netmail.ini* file.

*‘From’ Line:* Address that this e-mail will be sent from.

**NOTE:** This value overrides the sender address in the *cfg/netmail.ini* file.

*‘Subject’ Line:* Text to include in the subject line. The confirmation number will be appended to this text.

*Mail Header/Footer:* The confirmation e-mail contains a pre-defined message, which includes the information that was entered into the Erez2 screens. The header and footer fields specify the text that is added before and after the pre-defined text.

## Configuring RentWorks for Erez2 *(continued)*

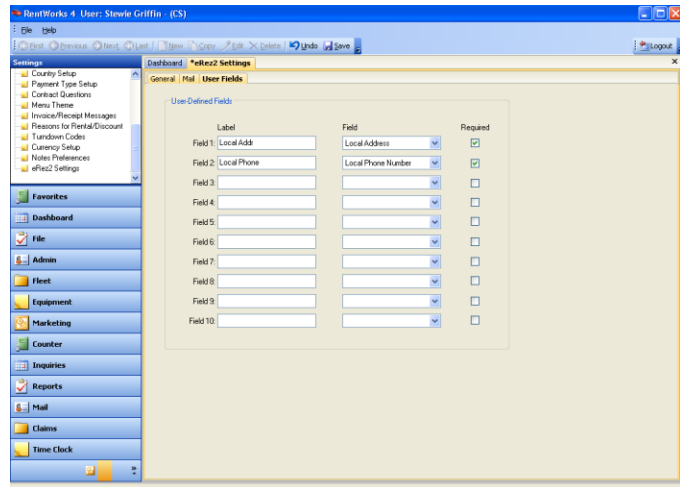
### User Fields Tab

The **User Fields** screen has settings for up to 10 custom fields. Custom fields appear between the credit card expiration fields and the notes field:

*Label:* The text that appears next to the label.

*Field:* The RentWorks field that will hold the data that the Internet user types into the field. Use the combo box to choose a data field.

*Required:* If this box is checked, then the Internet user must enter something in the field before they are allowed to continue.



## Configuring RentWorks for Erez2 *(continued)*

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### Location Settings

*Description:* The Description field is used in the Location combo boxes. The description must be unique for all locations.

*Reporting Level:* This defines how the system calculates availability. For example, if “District” is chosen, the system will find the pickup location’s city, then that city’s district. From there, all cities under that district are found, then all locations under those cities are found. That list of locations is used when calculating availability.

*Disclaimer:* The Disclaimer field is text that is printed in the Rental Information column after the user has chosen a pickup location and has clicked on ‘Submit’.

### Vehicle Class Settings

*Description:* The Description field is used in the Class combo box. The description must be unique for all Classes.

*Disclaimer:* The Disclaimer field is text that is printed next to the selected class after the user has clicked on ‘Submit’.

*Image File:* The Image File field specifies the picture that is used by Erez2. The system will always look in the ‘images’ directory for this file. The images should be 150 pixels wide by 100 pixels high. The filename should not include the whole path. And if the web server is UNIX or Linux, the filename is case-sensitive (NetRent2 is Windows; *not* case-sensitive). Please use .jpg or gif files (not bmp).

*Check Availability:* The Check Availability toggle box tells Erez2 whether or not to check availability for this class. Turning this option off allows for overbooking.

### Rates Settings

The Rates table has a field called Web. It is a toggle box to specify whether or not this rate should be used by Erez2. If the toggle box is not checked off, Erez2 will ignore the rate when doing its calculations. The rate does not have to be on sale to be used in Erez2.

The Disclosure field in Rate Rules is also used by Erez2. It is displayed along with the selected rate, next to the vehicle image.

## **Configuring RentWorks for Erez2** *(continued)*

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### **Special Events Settings**

To create a special event for use in Erez2, check off the Web checkbox. Note that this special event will apply only to Erez2; if it needs to apply to the RentWorks counter too you will need to create another special event with the Web box unchecked.

### **Miscellaneous Charges**

The Miscellaneous Charges and Fees & Taxes programs have a field called Web. It is a toggle box to specify whether or not this charge should be used by Erez2. If the toggle box is checked off, Erez2 will display the charge after the user has selected a class. The Internet user can add those charges to his reservation if desired. If the charge is a tax or fee, the Internet user will not have the option to add it; the charge will automatically be added to the reservation and will be shown before the Internet user confirms the reservation.

The Description field is used in Erez2 to show what the charge is when it is displayed in the Coverages/Additional Options section.

### **Local Companies**

If a value is entered in the 'Corp ID' field, Erez2 will attempt to match it against the local companies' A/R Customer field. If a match is found, that company's rate will be used. The credit card validation check is also affected depending on the 'Credit Card Required' setting in System Settings.

### **Transaction Numbers**

A different set of transaction numbers is used for Erez2 reservations. Go into Transaction Numbers. For each location, set up a transaction number series of type "Erez2".

## Multiple Web Page Sets

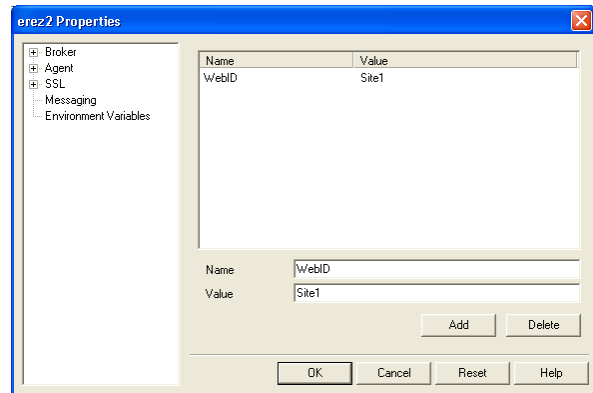
Multiple sets of Erez2 web pages can be run off a single database. Each page set can be customized for different looks, and each set has a separate control record.

Copy the set of Erez2 HTML pages in the `\web` directory to another, such as `\web2`. Create another WebSpeed service for this new Erez2 site. See the “Setting up WebSpeed” section for more information. Be sure that the working directory is set to the one you just created.

### WebSpeed Settings

In the WebSpeed Service properties is an item called “Environment Variables”. Enter “WebID” as the variable name and give it some value. This value must match the ID field in the Erez2 Settings record.

Each Erez2 WebSpeed service needs to have a unique, non-blank WebID value. Go into the properties of the original WebSpeed service and enter a unique WebID value for that site too. Restart it for the change to take effect.



Normally each WebSpeed service for the multiple page sets will be exactly the same except for the WebID and Working Directory values. It is suggested you also change the log file names to keep them separate. You can change any other settings such as the minimum/maximum agents, but it is not necessary.

### RentWorks Settings

On the General tab in Erez2 Settings, a field called “ID” matches the control record with the proper web page set. The location list is used to specify which locations will appear on the Erez2 site. Only owned locations with a description will appear in this list.

All other fields can be set according to how the Erez2 pages should work. If you are using only one Erez2 page set, leave the ID field blank. But for multiple page sets, each service with a WebID must have a corresponding control record where the ID field matches the WebID value.

## Reporting

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There are two reports specifically for Erez2.

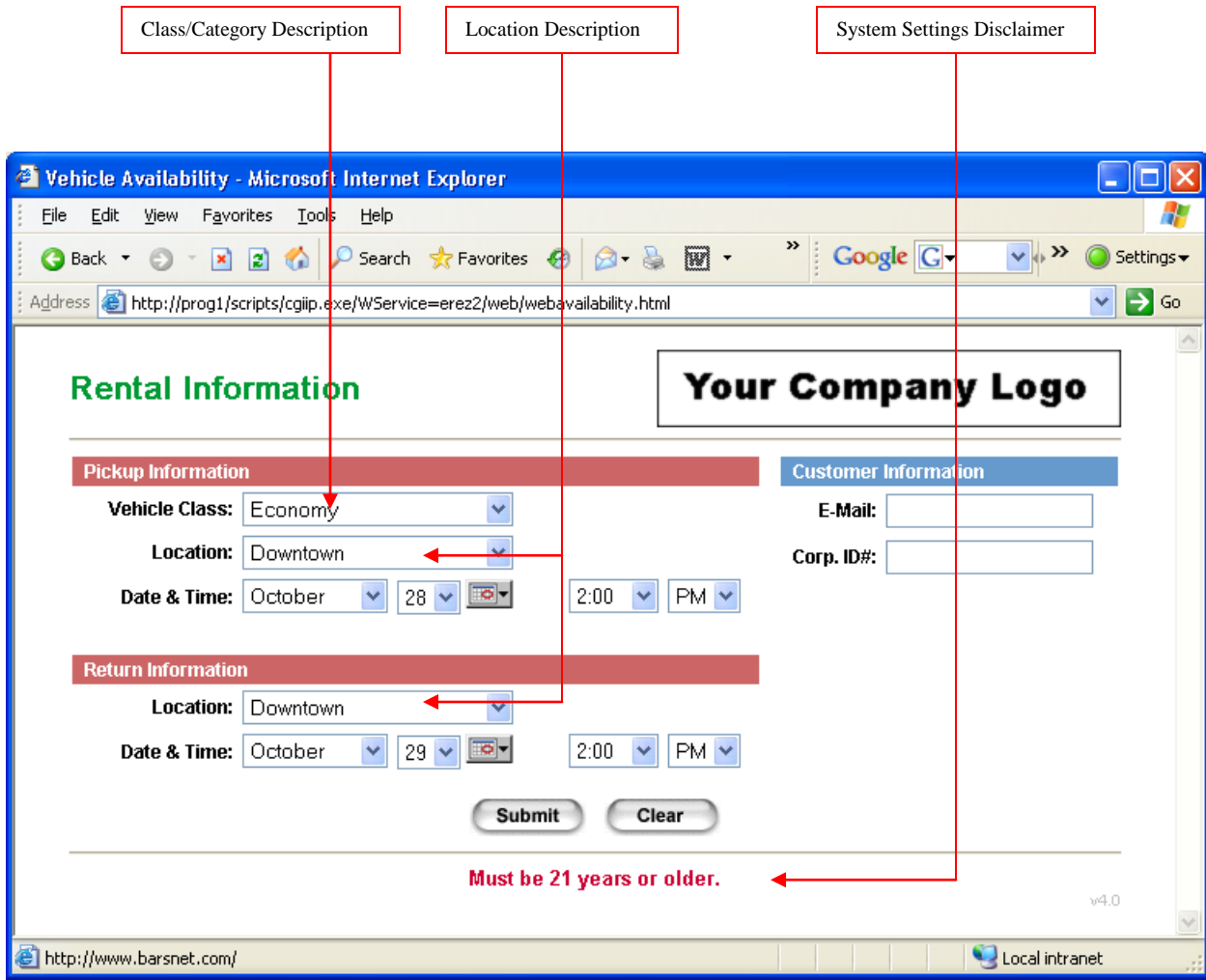
### **Erez2 Reservation Report**

For a given date range, it will list all reservations that were created through Erez2. After that, all contracts that were opened from Erez2 reservations are listed. The report also contains an option to print a summary for use with billing.

### **Erez2 Activity Report**

This report reads data from a log file which is updated whenever the Erez2 web pages are accessed. The log file keeps track of events such as whenever the main Erez2 web page is accessed, whenever a rate quote is requested, and whenever a reservation is created. The report summarizes the activity information for a given date range.

## Description/Disclaimer Positions



## Description/Disclaimer Positions *(continued)*

The screenshot shows a Microsoft Internet Explorer window titled "Vehicle Availability - Microsoft Internet Explorer". The address bar contains the URL: `http://prog1/scripts/cgiip.exe/WService=erez2/web/webavailability.html`. The page content includes a header with "Rental Vehicle Options" and "Your Company Logo". Below the header, there is a "Sport" section featuring a yellow sports car and a "Make A Reservation" link. To the right of the car is a table of rental details:

<b>Rate:</b>	\$25.00 per day
<b>Free Miles:</b>	Unlimited
<b>Excess Miles:</b>	\$0.00
Vehicles have manual transmissions.	
Rate valid only when booking through the Internet.	
Maximum 30 day rental.	

Below the table is a "Back" button. To the right of the table is a "Rental Information" box containing:

**Pickup:**  
Bluebird Headquarters  
10/28/08 - 2:00PM

**Return:**  
Bluebird Headquarters  
10/29/08 - 2:00PM

**Office Hours: M-F 8 am to 7 pm  
Sat 9 am to 3 pm Sun Closed**

Three red arrows point from callout boxes below to specific text on the page:

- "Class Disclaimer" points to the "Sport" header.
- "Rate Rule Disclaimer" points to the text "Rate valid only when booking through the Internet."
- "Pickup Location Disclaimer" points to the "Pickup:" section of the Rental Information box.

## Description/Disclaimer Positions *(continued)*

The screenshot shows a Microsoft Internet Explorer browser window displaying a vehicle reservation page. The page is titled "Coverages & Options" and features a "Your Company Logo" placeholder. The main content is organized into three sections: "Coverage Options", "Additional Options", and "Taxes & Fees".

- Coverage Options:** Includes checkboxes for "Collision Damage Waiver" (\$ 10.00 per day), "Personal Accident Ins." (\$ 3.95 per day), and "Suppl. Liability Ins." (\$ 3.95 per day).
- Additional Options:** Includes a dropdown for "Car Phone" (0 units, \$ 15.00 per unit) and a checkbox for "Prep" (\$ 5.00).
- Taxes & Fees:** Includes "NJ Sales Tax" at 6.0%.

At the bottom of the options section are "Submit" and "Back" buttons. To the right, a "Rental Information" sidebar displays a yellow sports car and states: "Vehicles have manual transmissions." Below this, it lists: "Rate: \$25.00 per day", "Free Miles: Unlimited", "Excess Miles: \$0.00", and "Rate valid only when booking through the Internet. Maximum 30 day rental." Pickup and return details are provided: "Pickup: Bluebird Headquarters 10/28/08 - 2:00PM" and "Return: Bluebird Headquarters 10/29/08 - 2:00PM". A red box at the bottom of the sidebar contains "Office Hours: M-F 8 am to 7 pm Sat 9 am to 3 pm Sun Closed".

Four red callout boxes with arrows point to specific elements:

- Misc. Charge Description:** Points to the checkboxes in the "Coverage Options" section.
- Class Disclaimer:** Points to the "Vehicles have manual transmissions." text.
- Rate Rule Disclaimer:** Points to the "Rate valid only when booking through the Internet. Maximum 30 day rental." text.
- Pickup Location Disclaimer:** Points to the "Office Hours: M-F 8 am to 7 pm Sat 9 am to 3 pm Sun Closed" text.

## Description/Disclaimer Positions *(continued)*

The screenshot shows a web browser window titled "Renter Information - Microsoft Internet Explorer". The address bar shows the URL: `https://prog1/scripts/cgip.exe/WService=erez2/web/webrenterinfo.html`. The page content is divided into two main sections: "Personal Information" and "Rental Information".

**Personal Information:** This section contains several input fields: First Name (Art), Last Name (Vandelay), Address (135 West 35th St.), City (New York), State (NY), Zip (10101), Phone# (212 555 5486), E-mail (art@vandelayindustries.com), Card Type (Visa), CC# (4012000033330026), Exp Date (June 2010), Local Addr (Hilton), and Local Phone (2125551234). There is also a "Notes" text area and "Submit" and "Back" buttons.

**Rental Information:** This section features a "Sport" category with a yellow sports car image. Below the image, it states "Vehicles have manual transmissions." and lists the following details: Rate (\$25.00 per day), Free Miles (Unlimited), Excess Miles (\$0.00), and a disclaimer: "Rate valid only when booking through the Internet. Maximum 30 day rental." It also specifies Pickup and Return locations and times at Bluebird Headquarters, and Office Hours: M-F 8 am to 7 pm, Sat 9 am to 3 pm, Sun Closed.

Red arrows point from labels to specific elements: "Class Disclaimer" points to the top right of the browser window; "Custom Fields" points to the "Local Addr" and "Local Phone" fields; "Payment Type Description" points to the "Card Type" dropdown; "Rate Rule Disclaimer" points to the "Rate valid only when booking through the Internet..." text; and "Pickup Location Disclaimer" points to the "Pickup" location and time information.

## Alert Messages

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If Erez2 experiences a problem while making a reservation, it will alert you in one of two ways: with an EDI log entry for minor problems, and with a System Alert for more serious problems. The following list shows where errors are logged.

### EDI Log

- A rate could not be found for the selected class
- Invalid (or nonexistent) feature code for Erez2
- The rate could not be added to the reservation
- Could not obtain a Renter ID for a new renter record
- Could not obtain a Confirmation Number for the reservation

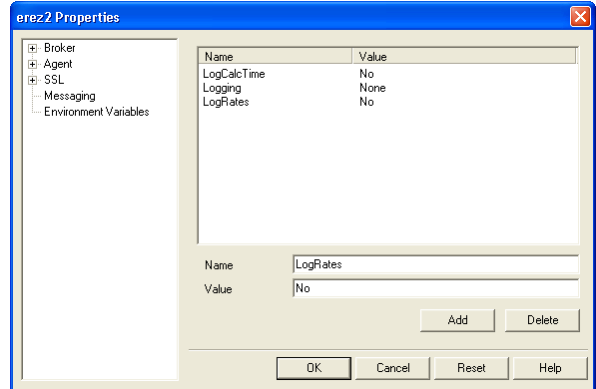
### System Alert

- Invalid (or nonexistent) feature code for Erez2
- Could not obtain a Renter ID for a new renter record
- Could not obtain a Confirmation Number for the reservation

## Logging

There are several logging options available in Erez2 for troubleshooting. Aside from the WebSpeed log, the other logs are activated through the Environment Variables section of the WebSpeed service properties. The WebSpeed service will need to be stopped and restarted for changes to take effect.

Refer to the Erez2 Troubleshooting Guide for more information on what to look for in the logs.



### Erez2 Log

To log the progression of the Erez2 back-end programs, turn on the Erez2 log file. Create an environment variable named “LogCalcTime”. The log entries will appear in the WebSpeed server log. There are four settings: None, Basic, Extended and Verbose. The amount of log entries increases with the logging level.

### Calculation Time Log

To see how long the Erez2 availability calculations are taking, turn on the calculation time log. Create an environment variable named “LogCalcTime” and set the value to “True” or “Yes”. A file called “CalcTimes.log” will be created in the *Rentworks/logs* directory. The log will show key points in the calculation along with a running time total and time difference from the previous point.

### Rate Qualification Log

To see how the rates were selected by Erez2, turn on the rate qualification log. Create an environment variable named “LogRates” and set the value to “True” or “Yes”. A file called “RateQualify.log” will be created in the *Rentworks/logs* directory. It shows the rates that were found, along with any reason why they did not qualify.

## Setup Checklist

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Here is a brief summary of the steps involved in setting up Erez2:

- Install Progress WebSpeed Transaction Server.
- Configure & start the “AdminService” service.
- Create & configure the ‘Erez2’ WebSpeed broker.
- Unzip the ‘erez2srcweb.zip’ files.
- Compile the server/web\* and server/rpt/rpterez\* programs.
- Create an ‘images’ directory on the web server, unzip ‘erez2img.zip’ into it.
- Create a .wsc connection script in the Scripts directory.
- Configure the Erez2 fields in RentWorks.