



**Rental Car Manager™**  
SERIOUSLY SIMPLE SOFTWARE

# Getting Started with Rental Car Manager

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## Getting Started with Rental Car Manager

Setting up your new Rental Car Manager (RCM) system and entering the information about vehicles and rates/fees so that you are able to start using RCM to record bookings may seem a bit daunting.

This article will walk you through this process with the aim of ensuring that you have an understanding about how to best set up all of the settings within RCM to allow RCM to support the way that your company works.

There are several different areas that will be focused on:

- Accessing RCM
- System Settings
- Vehicles
- Rates/Fees

### Accessing RCM

When your new RCM area has been setup, you will have been sent an email which contains the URL to use to access the RCM login page. This email will also contain a username and password.



Sign in to Rental Car Manager

If you are unable to log in using these details, firstly ensure that are definitely using the URL that was sent to you. If you are logging in from different PCs or tablets, you are best to send the URL to each as you cannot find it using a “search. Then check that you have typed the username and password in correctly, remembering that it is case sensitive.

If you are still unable to log in, please contact RCM Support [support@rentalcarmanager.com](mailto:support@rentalcarmanager.com).

Before you start setting up your new RCM system, in particular creating new users, we recommend that you take the time to read the following Knowledge Base article. It describes how the security within RCM works, [Security with RCM](#).




## **System Settings**

The following information needs to be setup before you can start using RCM.

- Company
- Locations
- Users
- Templates
- System Parameters

### ***Company***

Within RCM you can setup information about your company. This information is used when producing any documents within RCM, i.e. Rental Agreements, Confirmations, Quotes etc. You can see the type of information that is entered in the image below. For instance, if you want the ABN Number to appear on your Rental Agreement, then you need to enter this information here.

 Reservations
 Reports
 Vehicle Maintenance

Company Info
Company Key

Update Company (\* field is required)

<p>Company * : <input type="text"/></p> <p>Currency: <input type="text" value="Au"/></p> <p>Address: <input type="text"/></p> <p>City: <input type="text"/></p> <p>PostCode: <input type="text"/></p> <p>Phone: <input type="text"/></p> <p>Fax: <input type="text"/></p> <p>Free Phone : <input type="text"/></p> <p>Mobile : <input type="text"/></p> <p>Account Payment Details : <input type="text"/></p> <p>Infringement Email : <input type="text"/></p> <p>Terms &amp; Conditions URL : <input type="text"/></p> <p>Trading Name <input type="text"/></p>	<p>ABN No : <input type="text"/></p> <p>Licence No.: <input type="text"/></p> <p>Suburb/Town: <input type="text"/></p> <p>State/Province: <input type="text"/></p> <p>Country: <input type="text" value="Australia"/></p> <p>* Email * : <input type="text"/></p> <p>Web Site : <input type="text"/></p> <p>Slogan <input type="text"/></p> <p>CC Email : <input type="text"/></p> <p>Map URL <input type="text"/></p> <p>Privacy URL : <input type="text"/></p> <p>Banner Image Name <input type="text"/></p> <p>Email and Web module background colour: <input type="text" value="#0070C0"/> <span style="color: red; font-weight: bold;">(Use dark colors for better readability.)</span></p>
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Please Note : Please enter the Web Site field in the format : [www.yourwebsite.com](#)  
When entering the Terms and Conditions URL please use the following format.  
[www.yourwebsite.com](#) (do not include the http://)  
The Banner is used for your online booking steps, email quotation and confirmation, etc.  
If no Banner image is entered here, your standard logo will be used.  
The Banner image name must not include spaces.(image size approximately 700 x 100 pixels.)  
[Click here](#) to upload the Banner image.

When you first log into RCM you will see that a default Company record has already been setup. You are not able to delete this record; however you are able to edit it. We would recommend checking the information against this company record to make sure that the details are correct.

The Company screen can be found by navigating to the System Setup menu and choosing the Company Info option.

The following getting started video shows the basics of editing/ adding a company; [Adding/ Editing a Company](#).

The following Knowledge Base article describes the Company Information screen in more detail including a description of each of the fields, [Company Information Screen](#).

### **Locations**

Your Branches and/or Depots are called Locations within RCM.

When you first log into RCM you will see a default Location which will have been setup. You will not be able to delete this record; however you will be able to edit it.

Locations are an important part of the overall RCM functionality; therefore we recommend that you take the time to make sure that you have them all entered into RCM with the correct information.

Reservations
 Reports
 Vehicle Maintenance

Locations
Location Hours
Regions
Region Locations

**Update Location (\* field is required)**

Location * : <input style="width: 90%;" type="text"/>	Code * : <input style="width: 80%;" type="text"/> (Maximum 5 Characters)
Renting Location : <input checked="" type="radio"/> Yes <input type="radio"/> No	Location Prefix : <input style="width: 80%;" type="text"/> (Maximum 3 Characters)
Company Name : <input style="width: 95%;" type="text"/>	Master Location : <input type="text"/> Select (Optional) ▼
Address : <input style="width: 95%;" type="text"/>	Suburb/Town : <input style="width: 95%;" type="text"/>
City : <input style="width: 95%;" type="text"/>	State/Province : <input type="text"/> Australia NT ▼
Post Code : <input style="width: 95%;" type="text"/>	Country : <input style="width: 95%;" type="text"/>
Phone : <input style="width: 95%;" type="text"/>	Fax : <input style="width: 95%;" type="text"/>
Free Phone : <input style="width: 95%;" type="text"/>	Mobile : <input style="width: 95%;" type="text"/>
Email : <input style="width: 95%;" type="text"/>	Time Difference to GMT * : <input style="width: 50px;" type="text"/> 0 <a href="#">View Country GMT list</a>
ABN # : <input style="width: 95%;" type="text"/>	Airport Code : <input type="text"/> Select (Optional) ▼
Licence No. : <input style="width: 95%;" type="text"/>	Location Currency : <input style="width: 50px;" type="text"/>
Infringement Email : <input style="width: 95%;" type="text"/>	Currency Symbol : <input style="width: 50px;" type="text"/>
Account Payment Details : <input style="width: 95%;" type="text"/>	IP Address : <input style="width: 95%;" type="text"/>

Note: 1. The Location Prefix may be used to prefix a printable document .. ie RA, Confirmation, Invoice .. etc.  
 2. Setting a 'Master Location' makes this a Sub-Location and allows viewing by Operators who belong to the Master Location.  
 3. Ensure the state is selected correctly as this affects local tax calculations  
 4. The email address is used to 'CC' any email confirmations sent.  
 5. 'Time Difference to GMT' is used to ensure local booking times for this location are recorded correctly.  
 6. IP Address - Allow user login access by locations IP Address

The Locations screen can be found by navigating to the System Setup menu and choosing the Locations option.

The following getting started video shows the basics of editing/ adding a location; [Adding/ Editing a Location](#).

The following Knowledge Base article describes the Locations screen in more detail including a description of each of the fields, [Location Screen](#)

### Users

If you are going to have multiple people accessing RCM, we would recommend creating a user for each person. There is no limit to the number of users you can setup within your RCM system and there is no additional cost for having extra Users.

Creating a user for each person will allow you to set the access level for each user.

It also allows you to track who is logging in and making changes.

The User Maintenance screen can be found by Navigating to the System Setup menu and choosing the Users option.

The following getting started video shows the basics of editing/ adding a user; [Adding/ Editing a User](#).

The following Knowledge Base article describes the User Maintenance screen in more detail. This includes a description of all of the fields as well as information about the 4 different levels of access and how to control the menu items individual users do or do not have access to, [User Maintenance Screen](#)

The following Knowledge Base article talks about the extra security around accessing the User Maintenance screen, [Security within RCM to Access User Maintenance Screen](#).

If you are unable to access the User Maintenance screen, please contact RCM Support [support@rentalcarmanager.com](mailto:support@rentalcarmanager.com).

### ***Templates***

RCM allows you to customise the documents that are sent out from within RCM. You are able to do this by updating the various templates that exist within your RCM system.

It is important to note that when location specific templates are discussed below, the location is determined by the pickup location of the booking in question.

When your RCM system is created, each of the templates mentioned below, with the exception of any location specific templates, are populated with standard information. Therefore this is something that can be done after you have the other information setup.

The available templates are:

- Rental Agreement Template
- Confirmation Template
- Quotation Template
- Invoice Template

### ***Rental Agreement Template***

A Rental Agreement can be produced for each booking within RCM. This agreement can either be printed or emailed to a customer. There is also a function within RCM which allows you to obtain signatures on the Rental Agreement electronically.

There are 2 parts to the Rental Agreement. The top half is all of the information which is unique to the booking.

When you are given your RCM system, you are supplied with the standard Rental Agreement. If you wish to change how the top half of the Rental Agreement looks, simply get in touch with RCM Support [support@rentalcarmanager.com](mailto:support@rentalcarmanager.com).

The second half of the Rental Agreement is referred to as the Terms and Conditions section. This section is controlled by the Rental Agreement Template. Whatever you have setup here is what will appear on the Rental Agreement in this section.

The following getting started video shows the basics of editing your Rental Agreement; [Editing Your Rental Agreement](#).

The following Knowledge Base article describes how to edit the Rental Agreement Template in more detail, [Rental Agreement Template Screen](#).

### **Confirmation Template**

The Confirmation Template allows you to personalise the confirmation email that is sent out to your customers from within RCM.

There are two parts to the Confirmation Template, the Letter section and the Terms and Conditions section.

When a confirmation email is sent out it is built up in the following manner, first of all the Letter section from the confirmation template is displayed. There is then a standard section which contains all of the booking information. Then lastly the Terms and Condition section from the Confirmation Template.

There are also 6 different confirmation templates:

- Standard Confirmation Template – this is the template that is used to send out confirmation emails from within RCM. There are two sections to this template as discussed above.

The following getting started video shows the basics of editing your Standard Confirmation Template; [Editing Your Standard Confirmation Template](#).

- Location Confirmation Template – within RCM you are able setup different confirmation templates for each of your locations.  
If you need to have different information in either the letter or Terms and Conditions sections for different locations, then you would create a Location Specific Confirmation template.  
It is not necessary to setup a template for each location, if there is not a location specific template than the Standard Confirmation template will be used.
- Decline Template – when you decline a booking RCM sends a decline email using this template. The email simply consists of whatever you have setup in this template.
- Cancellation Template – after you cancel a booking you have the option of sending a cancellation email to the customer. If you choose to do this, RCM sends an email using this Cancellation template. The email simply consists of whatever you have setup in this template.
- Agent Confirmation Template – this template will be used when sending confirmation emails for any Agent bookings.  
You are able to setup both an Agent Standard Confirmation template and also location specific Agent Confirmation templates.
- Brand Confirmation Template – Within RCM you are able to have more than one Brand running. The following Knowledge Base article describes Branding within RCM in more detail, [Brands within RCM](#).



If you have Branding turned on in your system you are able to create Brand specific confirmation Templates.

The Following Knowledge Base article describes each of the templates and how to edit them in more detail, [Confirmation Template Screen](#)

### ***Quotation Template***

The Quotation template allows you to personalise the email that is sent out an email for a Quotation.

Just like the Confirmation template, there are two parts to the Quotation template as well, the Letter and the Terms and Conditions sections.

When a quotation email is sent out it is built up in the following manner, first of all the Letter section from the quotation template is displayed. There is then a standard section which contains all of the booking information. Then lastly the Terms and Condition section from the quotation Template.

There are 5 different quotation templates:

- Standard Quotation Template – this template is used when sending out quotation emails within RCM. There are two sections to the template as describes above.
- Location Quotation Template – just like the Confirmation template, you are able to create Location specific Quotation templates.  
This allows you to have different information if needed for locations.  
If there is no location specific template, then the Standard Quotation template will be used.
- Quotation Decline Template – if you decline a quotation within RCM this template is used to send an email out to the customer. The email simply consists of whatever you have entered into this template.
- Quotation Acceptance Template – when you accept a quote within RCM, i.e., convert it to a booking, this template is used to send an email out to the customer.
- Brand Quotation Template – if you have Branding turned on within your RCM system you are able to create Brand specific Quotation templates.  
For more information about branding please see the following Knowledge Base article, [Brands within RCM](#).

The following Knowledge Base article describes each of these templates and how to edit them in more detail, [Quotation Template Screen](#).

### ***Invoice Template***

The Invoice Template allows you to personalise the invoice that is sent out.

The top part of the invoice contains the booking information. The information entered into the template appears at the bottom of the invoice.

There are 2 different types of Invoice templates:

- Standard Invoice Template – The information entered into this template appears at the bottom of the invoice.
- Location Invoice Template – You also able to create location specific invoice templates. If there is no location specific template, then the standard invoice template is used.

The following Knowledge base article describes each of these templates and how to edit them in more detail, [Invoice Template Screen](#).

### **System Parameters**

Within RCM there are many system parameters that you are able to change. These system parameters can change the way that the functionality within RCM works.

While it is not important to look at these system parameters while setting up your RCM system, it is recommended that you have a look at them before you start using RCM as your live system.

The following getting started video shows the basics of editing system parameters; [Editing System Parameters](#).

The following Knowledge Base article describes these system parameters in more detail, [System Parameters within RCM](#).

### **Vehicles**

Before you start entering vehicles into RCM, you will need to set up some information with regard to certain fields that are used to classify vehicles within RCM.

The three areas that need to be setup before you can enter vehicles are:

- Category type
- Vehicle Categories
- Vehicle Makes, Models and Types

The following Knowledge Base article describes how to start adding vehicles into RCM once you have these areas setup, [Vehicle Update Screen](#).

#### **Category Type**

The Category Type is a high-level distinction for your Vehicle Categories. Your RCM system will come with a Category of Type which you will be unable to delete.

Some other examples of Category types are Bike, Camper, Truck, or Trailer.

When you setup a Category Type you are able to set both the Rate Type and the ordering.

The Rate Type can be one of 3 options:

- 24 Hour - If rate type is set to **24 hours**, the daily rate is applied every 24 hours of the booking period. i.e., A booking from 3/May/2017 10:00 – 6/May/2017 10:00 will be a 3 day hire.

- **12 Hour** - If rate type is set to **12 hours**, the daily rate is applied to every calendar day occurring during the booking period, this is normally used for campervans. i.e., A booking from 3/May/2017 10:00 – 6/May/2017 10:00 will be a 4 day hire.
- **Per Night** - If rate type is set to **Per Night**, the daily rate is applied to every calendar day occurring during the booking period, this is normally used for campervans. i.e., A booking from 3/May/2017 10:00 – 6/May/2017 10:00 will be a 4 day hire.  
Also any drop offs after 10 am and pickups before 2 pm will incur the "After Hours Fee" for the location. This is can be used for campervans where you are trying to enforce morning drop offs and afternoon pickups.

The following getting started video shows the basics of editing/ adding vehicle category types; [Adding/ Editing Vehicle Category Types](#).

The following Knowledge Base article will explain the Category Types screen in more detail, [Category Types Screen](#)

### ***Vehicle Categories***

We recommend that before you start setting up your Vehicle Categories, you allow some time to decide exactly how you wish to group your vehicles for charging purposes as when you setup rates within RCM, they are assigned to Vehicle Categories.

Taking this time will allow you to have a clearer idea of what your vehicle categories should be.

You assign ordering to each of the Vehicle Categories. This is used when displaying vehicles on both the Reservation Sheet and on the Web Booking module.

You can also choose to add a minimum age of driver to Vehicle Categories, this value defaults to 21.

If you assign an image filename to a Vehicle Category and the corresponding image file is uploaded to the server, this image will appear in any documents created within RCM relating to this Vehicle Category.

You can also assign a friendly description and the number of passengers/bags that can be carried for each Vehicle Category. This information is used by your website if you are using Rental Car Manager's Web Booking Module.

The following getting started video shows the basics of editing/ adding vehicle categories; [Adding/ Editing Vehicle Categories](#).

The following Knowledge Base article describes how to setup a Vehicle Category in more detail, [Setting up Vehicle Categories](#).

### ***Vehicle Makes, Models and Types***

You will need to create the various Vehicle Makes and Models before you can add vehicles to RCM as when you add a new vehicle you need to assign both of these values to the vehicle.

After setting up vehicle makes and models, you can also define vehicle type, e.g. station wagon, sedan, hatch back, among others, to further describe your vehicle. The vehicle type is displayed in pop-up hints when using the Reservation Sheet.

## **Rates/Fees**

Once you have Vehicles setup, the last step before you will be able to enter bookings into RCM is to setup the Rates and Fees.

To be able to enter rates into RCM you will first of all need to setup Seasons and the Rate Structure.

Once you have setup the rates, you can setup any extra fees.

### **Seasons**

A Season refers to a period of time over which a rate will be applied. You are able to create as many seasons as you like. Seasons allow you to setup different rates for different times of the year, i.e., your high and low seasons.

Your RCM system will have a season called Default, you will be unable to edit or delete this season.

Seasons are also location based, this means that you will need to setup the seasons for each of your locations. Each location will have a Default season.

You do not need to set up any seasons to start using RCM, you can use the default season. However if you will be charging different rates for different times of the year, then you will need to setup the relevant seasons.

If a season does not exist for any part of a booking, the Default season will apply for those days. ie, if you have a season called July that goes from 1/Jul/2017 – 1/Aug/2017 and your booking is 29/Jun/2017 – 10/Jul/2017, the days in July will be charged at the July season rate, and the days in June will be charged at the Default rate.

The following getting started video shows the basics of editing/ adding seasons; [Adding/ Editing Seasons](#).

The following Knowledge Base article describes creating the seasons in more detail, [Setting up Seasons](#).

### **Rate Structures**

You will need to define your Rate Structures before you can start assigning rates to Vehicle Categories. Rate structures allow you to setup different rates based upon the length of the hire.

Before defining your rate structures, you should already have an idea about the rates you will charge on a daily basis.

You can see in the image below that you assign a number of days to each rate structure. This enables you to charge a different daily rate depending upon how long the hire is.

Reservations		Reports		
<u>Rate Structure</u>		Hourly Rate Structure		
+ <a href="#">Add a record</a>				
No.	Rate Description	From Day	To Day	Delete
1	<u>1- 6 Days</u>	1	6	x
2	<u>7 - 10 Days</u>	7	10	x
3	<u>11-29 days</u>	11	29	x
4	<u>30 + days</u>	30	and more	x

The following getting started video shows the basics of editing/ adding rate structures; [Adding/ Editing Rate Structures](#).

The following Knowledge Base article describes how to create and maintain your Rate Structures in more detail, [Setting up Rate Structures](#).

### **Hourly/Part Date Rates**

Rate structures are normally defined for the number of days a vehicle may be rented. If you also charge hourly rates for your hires where the hire is less than 1 day, you need to define hourly rate structures as well.

You are also able to setup Part Day Rates which will enable you to charge for part of a day if the booking does not encompass an entire day., charge 3.5 days instead of 4.

Setting up Hourly and Part Day Rates is not necessary and if you do not have any Hourly or Part Day Rates setup, then the daily rates will be used.

The following Knowledge Base articles describe setting up both of these in more detail.

[Hourly Rate Structures](#)

[Part Day Rate Structures](#)

### **Rates**

Once you have the Seasons and Rate Structures setup you can create your rates. The Rental Rates are defined by Location, Season and Vehicle Category.

The image below shows the screen where you setup the rates. You can see that are able to assign a different daily rate to each of the Rate Structure that you have setup. You can also see in the highlighted section that you are able to implement Weekend Rates. If you have weekend rates setup here and the necessary System Flag is set, any bookings where the entire booking period falls between Midday Friday and Midday Monday will have the Weekend Rates applied.

System Setup **Rates By Season** Rates By Year Part Day Rate Rate Utilization

Select Brisbane Airport Active Season(s) Default This is where you can apply a rate to each of the structures that you have setup. View

+ Add a Rate

Default	Weekend	1- 6 Days	7 - 10 Days	11-29 days	30 + days	Update	Copy	Delete	Default
Copy seasonal rates	Update seasonal rates								
Small Auto	\$0.00	\$45.00	\$40.00	\$35.00	\$30.00	✓	⇨	✗	SMALL 'CAR , - ;--Auto
Medium Car	\$59.00	\$40.00	\$38.00	\$37.00	\$35.00	✓	⇨	✗	MEDIUM CAR
Family Sedan	\$60.00	\$60.00	\$55.00	\$50.00	\$45.00	✓	⇨	✗	FAMILY SEDAN
8 Seater Van	\$100.00	\$90.00	\$80.00	\$70.00	\$60.00	✓	⇨	✗	8 SEATER VAN
Family SUV	\$100.00	\$100.00	\$90.00	\$80.00	\$70.00	✓	⇨	✗	FAMILY SUV
Campers 2	\$0.00	\$100.00	\$90.00	\$80.00	\$70.00	✓	⇨	✗	Campers 2
Vehicle Category	Weekend	1- 6 Days	7 - 10 Days	11-29 days	30 + days	Update	Copy	Delete	Vehicle Category

Seasonal Weekend rates only apply to bookings that are 3 days or less with pickups and dropoffs between Friday midday (12:00) and Monday midday (12:00)

The following Knowledge Base article describes setting up the rates in more detail, [Setting up Rates](#)

**Extra Fees/Insurance**

You are able to setup various types of extra fees that can be added to bookings. The following Knowledge Base article explains this in more detail, [Extra Fees within RCM](#).