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# Introduction

This documentation provides descriptions of website usage, settings set up managements in detailed version for project supervisor and client. As the development team we will go through each page, function, permissions, roles and settings in Haukainga HomeWinds website. Addition to that this documentation has brief explanation of every plugin used in project and its purpose. However, many features can be added or upgraded by premium versions of certain plugins and this documentation will guide the client throughout the project and understand the functionality of website.

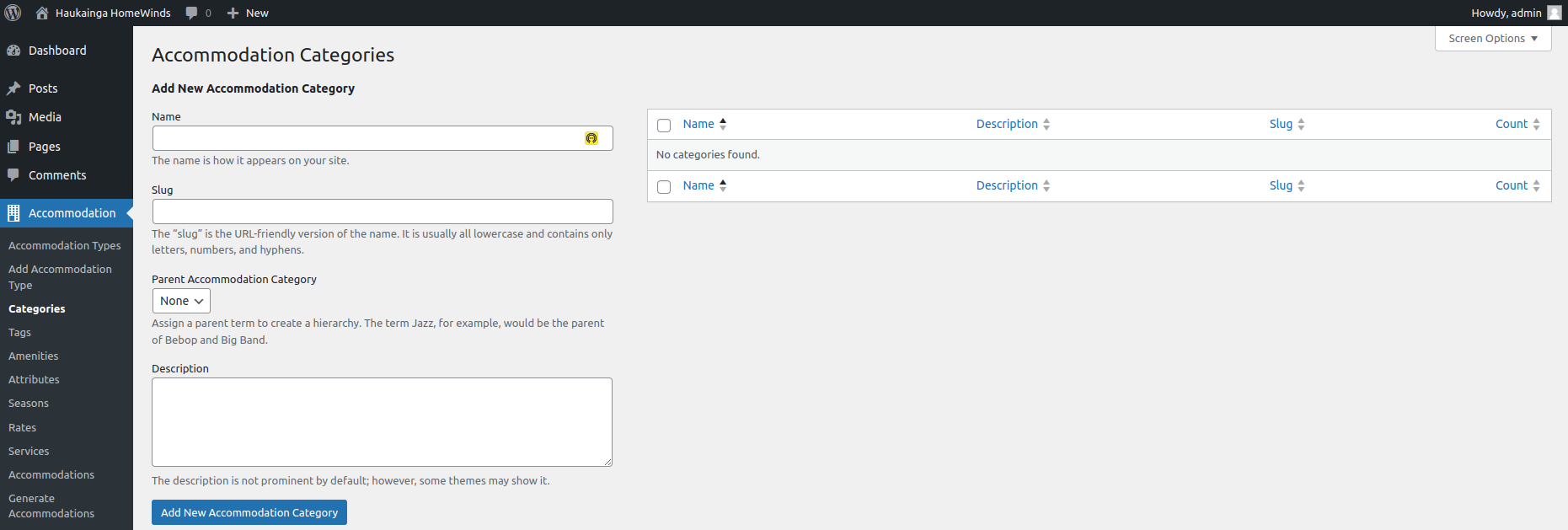
# Property Management

Property Management consists of various tasks. In this section, we will set up the necessary elements to add a new property to the website.

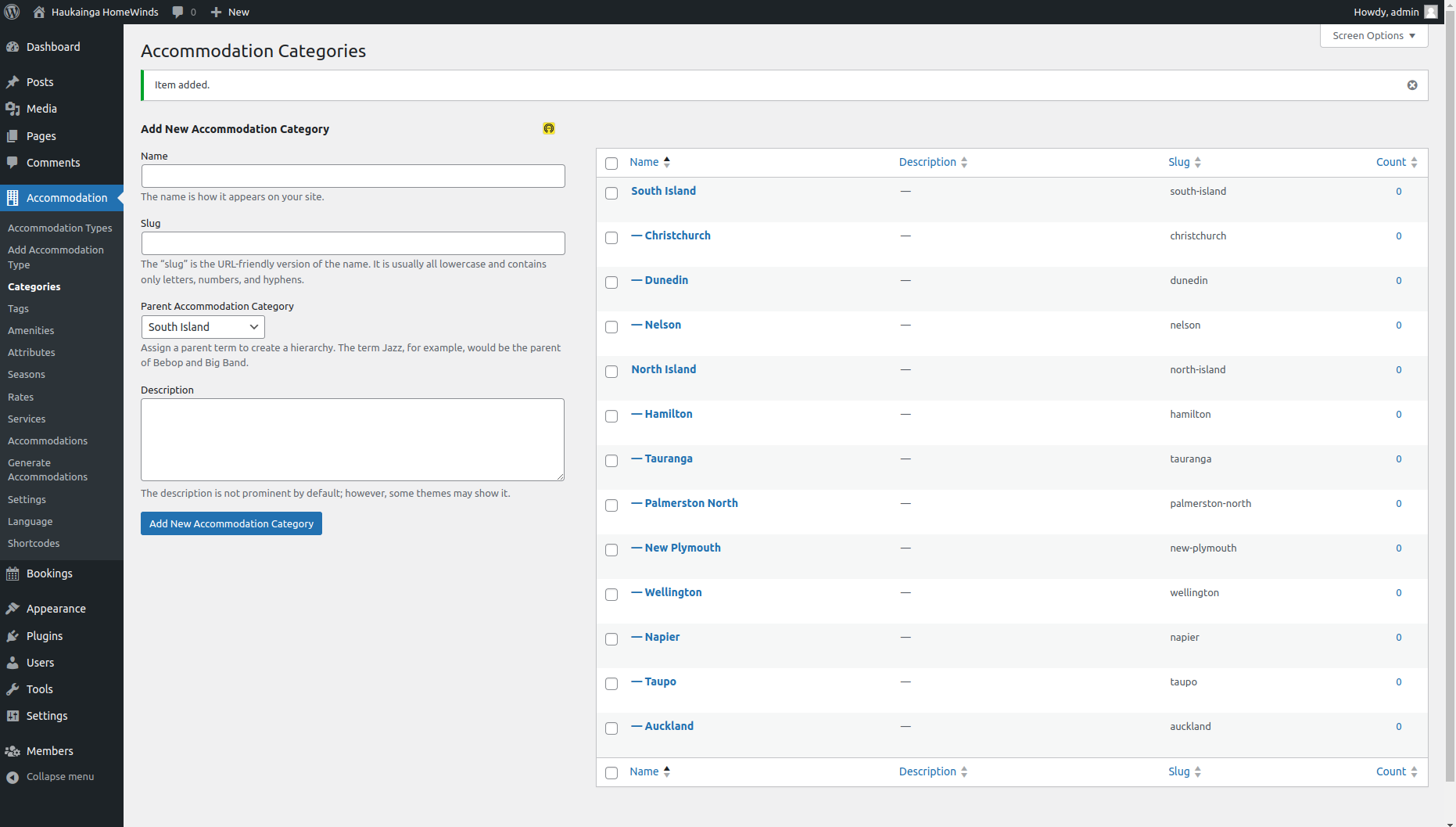
## Setting up

### Categories

Navigate to Accommodation/Categories (Figure ). New Categories can be added to give the customer more information about the property. We decided to add location information into the categories but it is not limited to it (Figure ). Categories will be available for selection in the creation of a new property. Categories can be added by administrators as well as property owners.



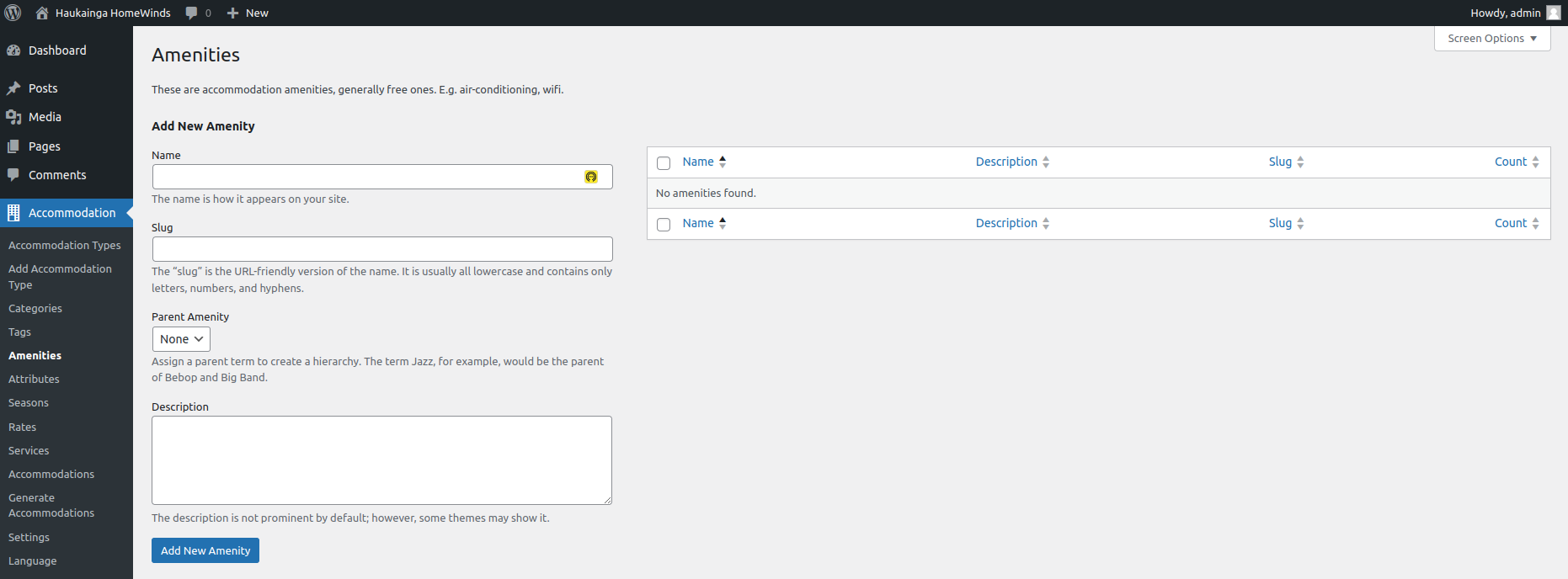
*Figure - Add new Categories*



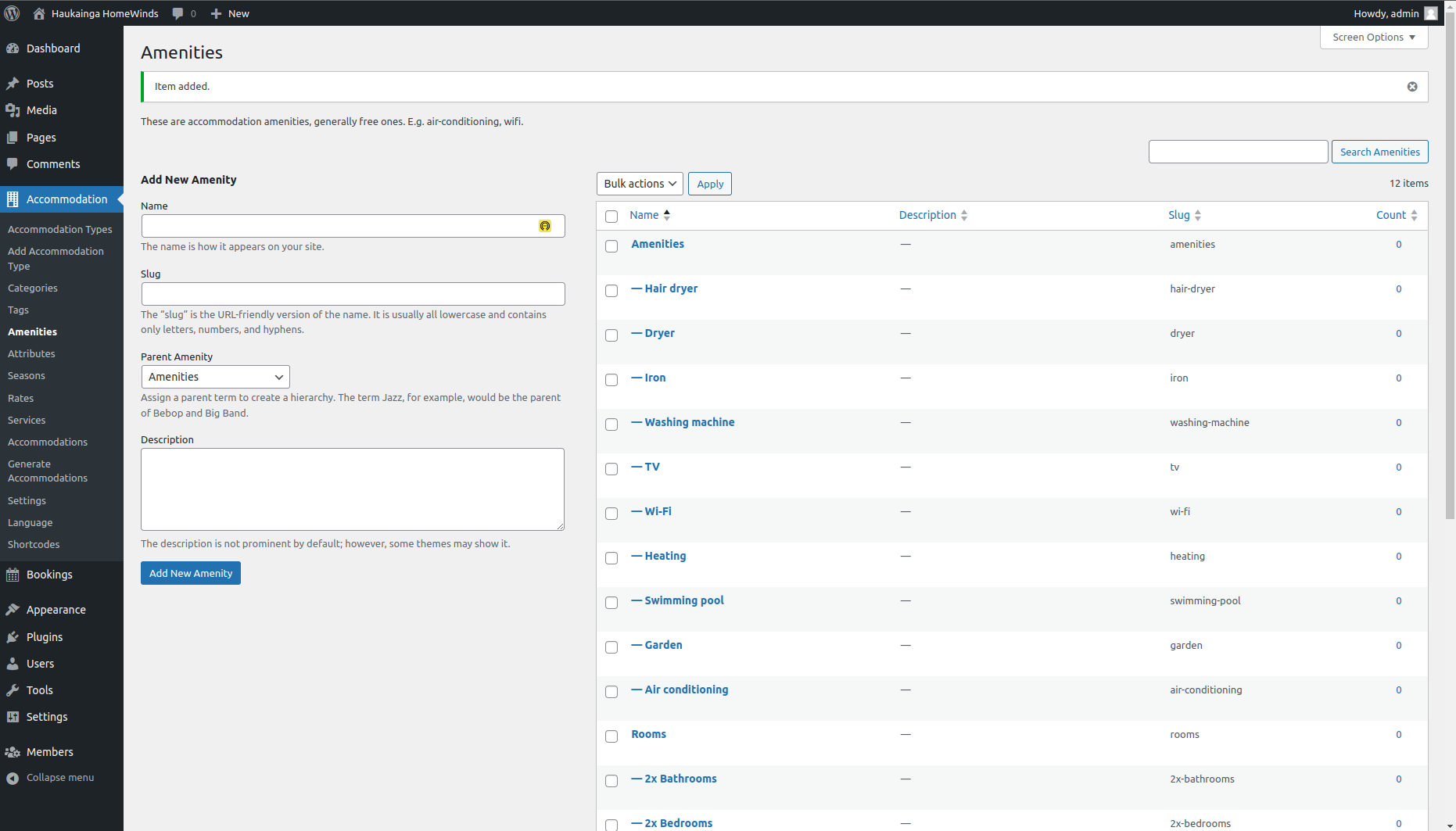
*Figure - Locations added*

### Amenities

Navigate to Accommodation/Amenities (Figure ). In this part, we will add amenities and possible features that can be selected during the creation of a new property. We decided to add information about the rooms as well as general amenities that could be of value to customers (Figure ). Amenities can be added by administrators and property owners.



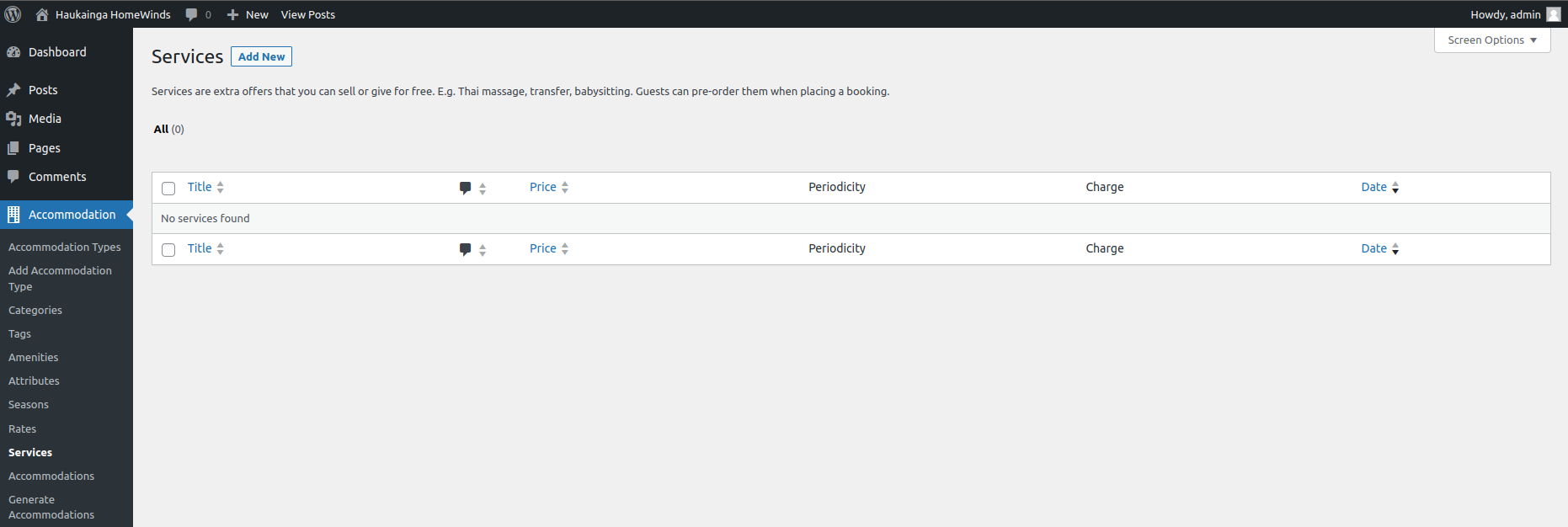
*Figure - Adding Amenities*



*Figure - Amenities added*

### Services

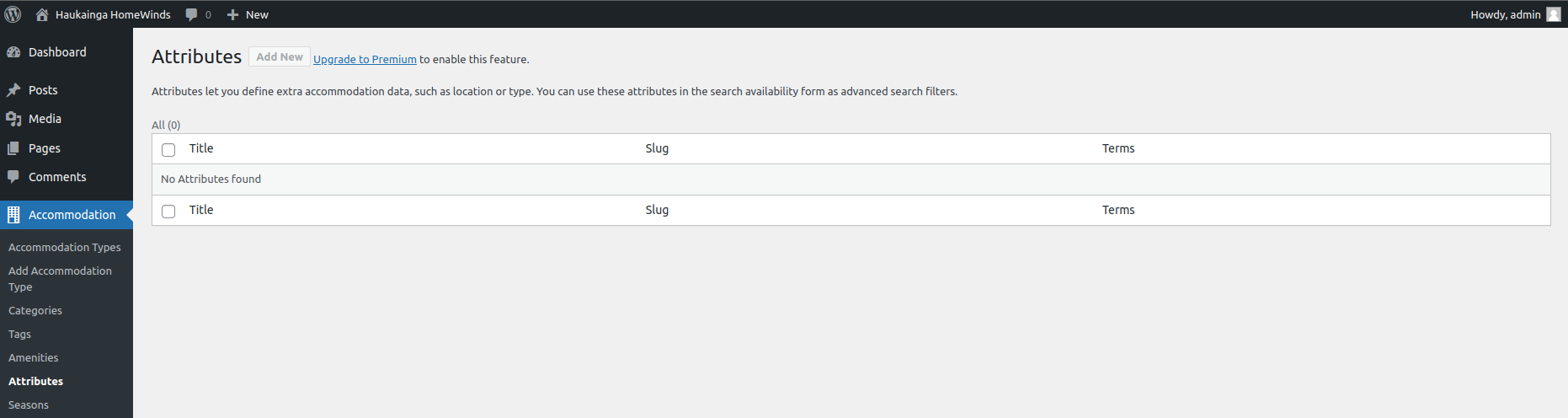
Navigate to Accommodation/Services (Figure ). The client stated that there might be collaborations with other businesses and service providers in the future. Services allow the property owners to add these third-party features, and adjust pricing and rates. Because this feature is not in use at the current stage, we did not include services during development. Services can be selected during the creation of a property. Services also include a page with additional information that can be customized by using “Elementor” or the WordPress page editor.



*Figure - Adding Services*

### Attributes

Navigate to Accommodation/Attributes (Figure ). This is a “Pro” feature of the Hotel Booking Plugin. We encourage the client to invest in these features. Attributes allow more detail than categories. Search functionalities also get extended and will be beneficial for the user experience.



*Figure - Adding new Attributes*

### Bed Types

Navigate to Accommodations/Settings/General => Misc # (Figure ). Here we can add different types of beds that will be available to add to a property.

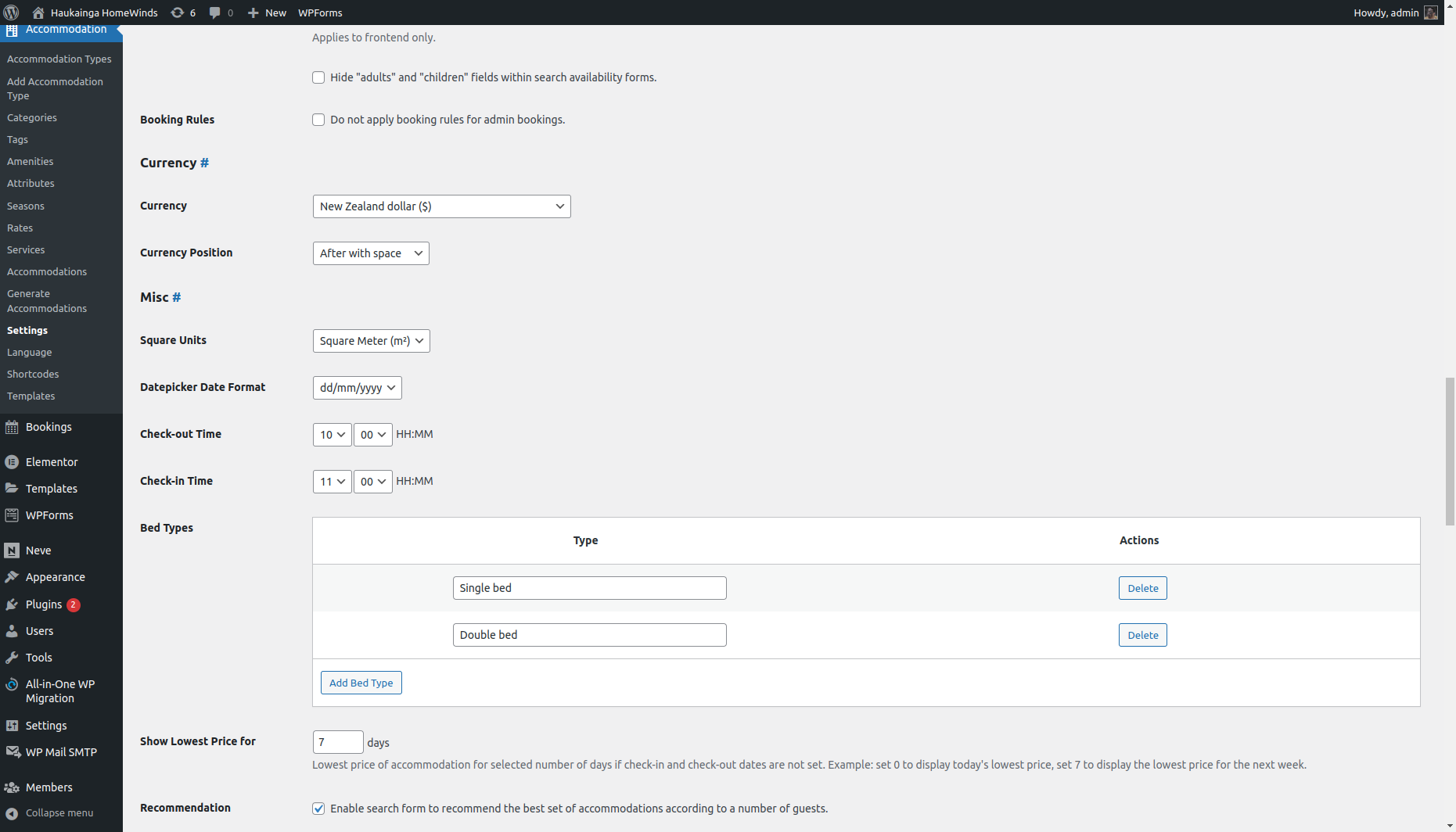
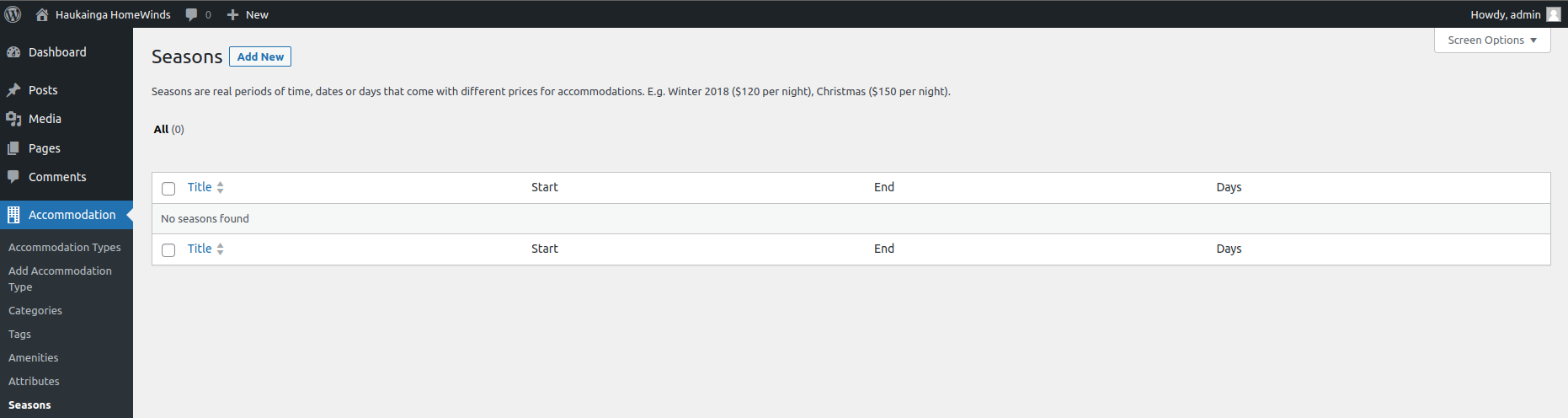


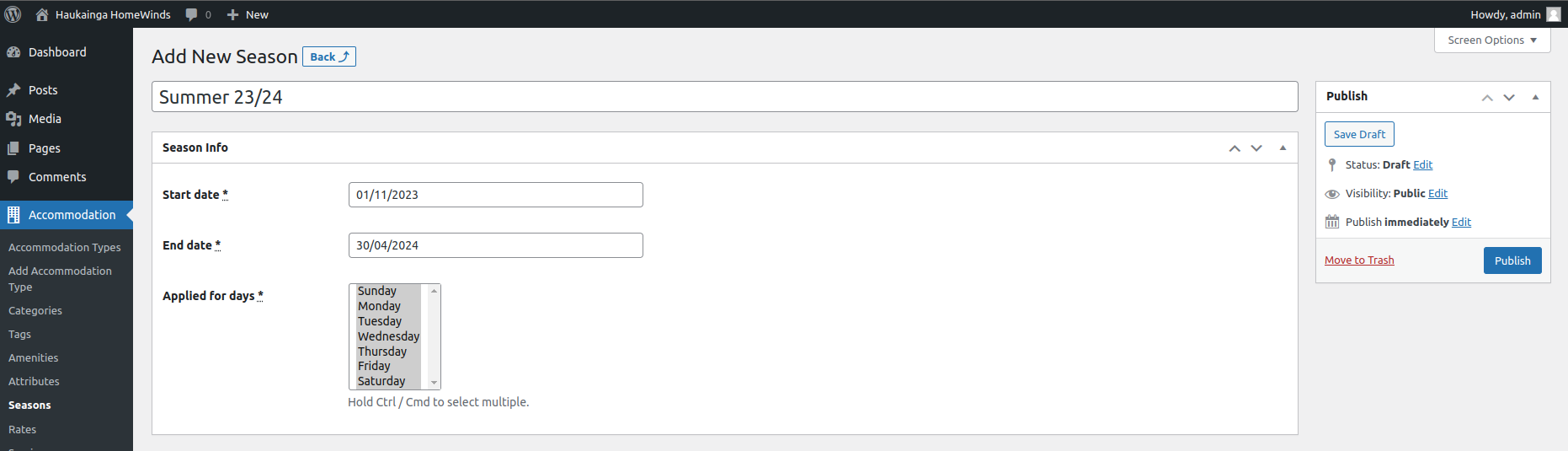
Figure - Adding Bed Types

### Seasons

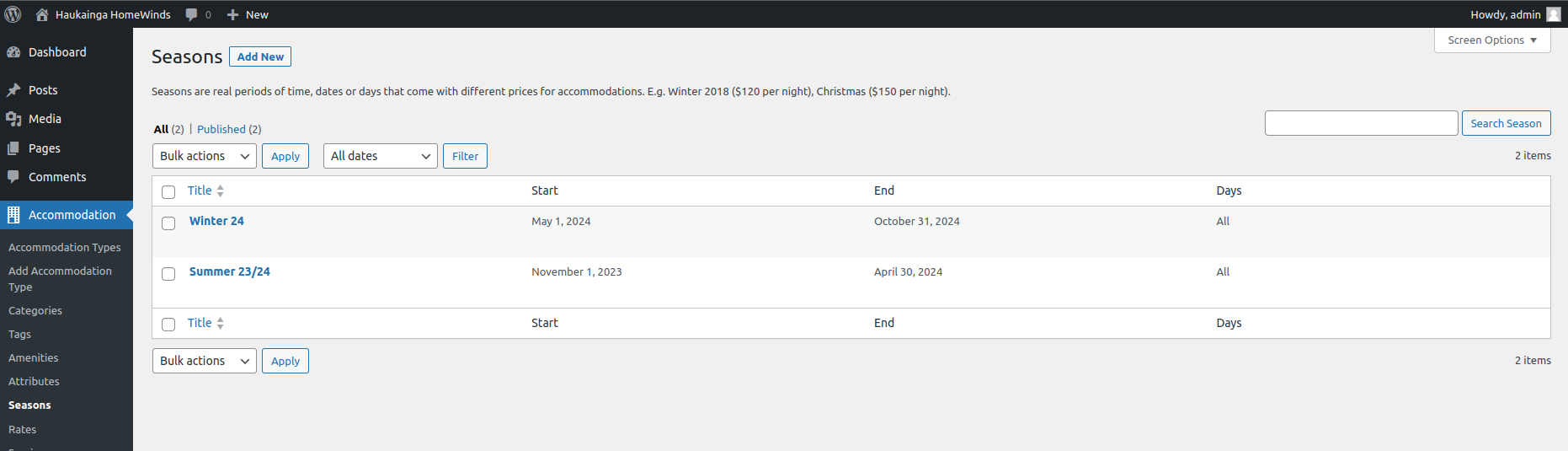
Navigate to Accommodation/Seasons (Figure ). As stated by the client, the website should include features for seasonal pricing. New seasons can be added by selecting start and end dates as well as applying seasonal prices only for specified days (Figure ). This could also be used to implement special prices for public holidays. Seasons will be available to set the prices for the properties (Figure ).



*Figure - Adding New Seasons*



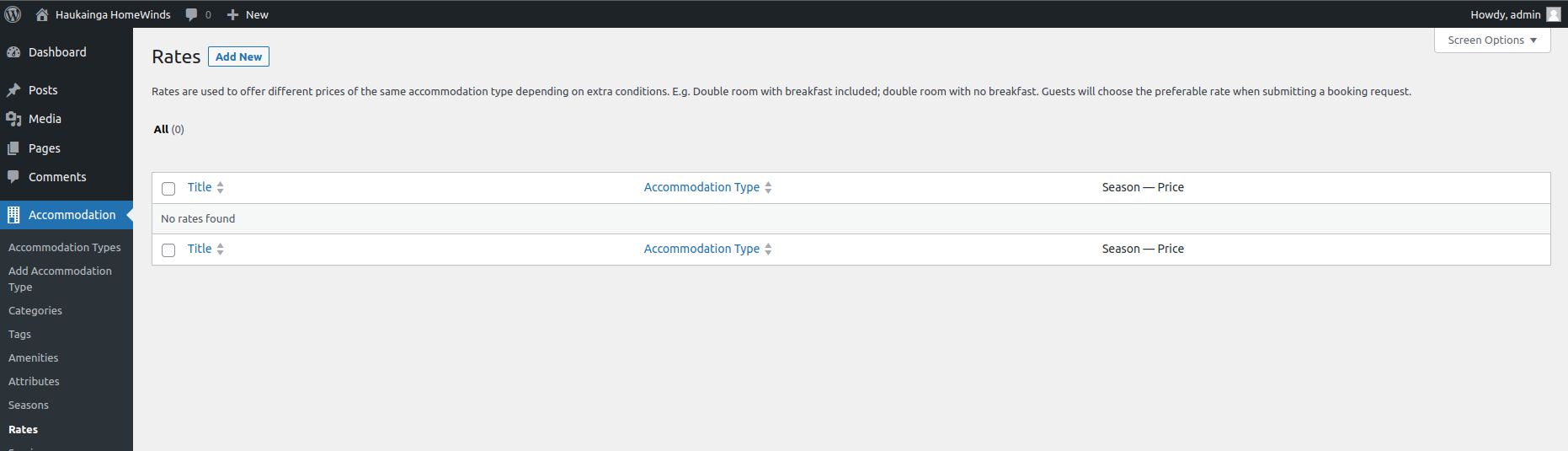
*Figure - Configuring a new Season*



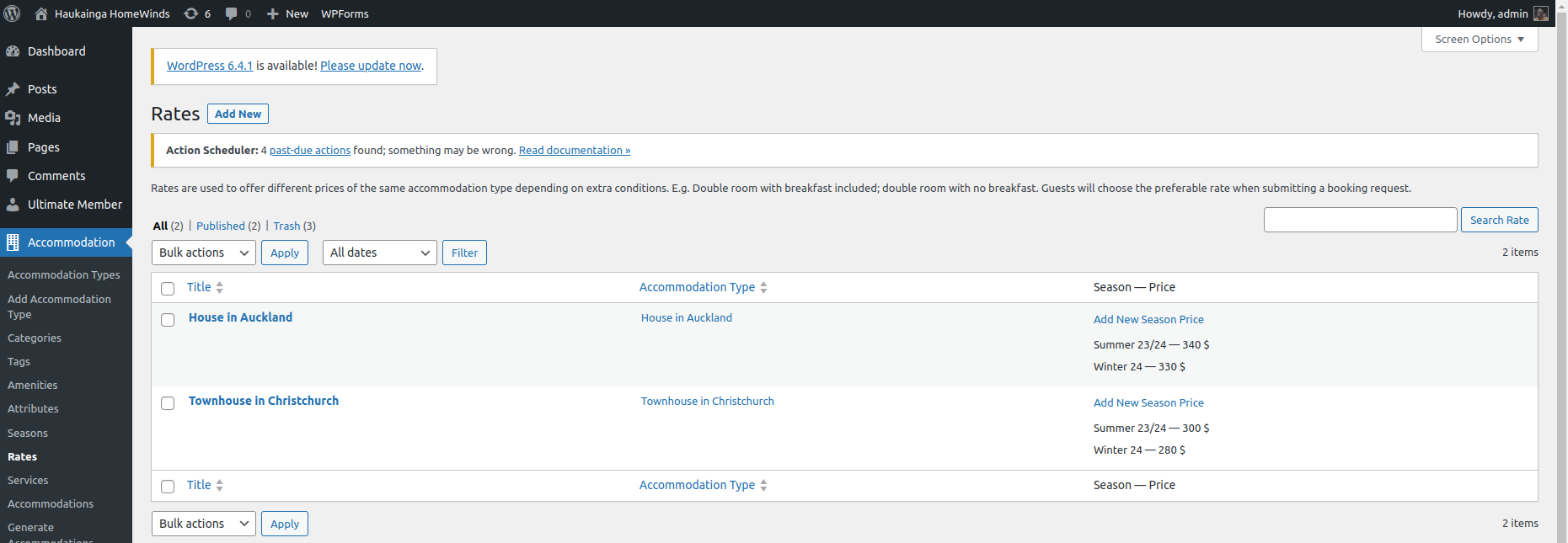
*Figure - Seasons added*

### Rates

Navigate to Accommodation/Rates (Figure ). Rates can be used to add different prices based on the previously created seasons (Figure ). Multiple rates can be added to also include special features or partial renting.



*Figure - Adding Rates*

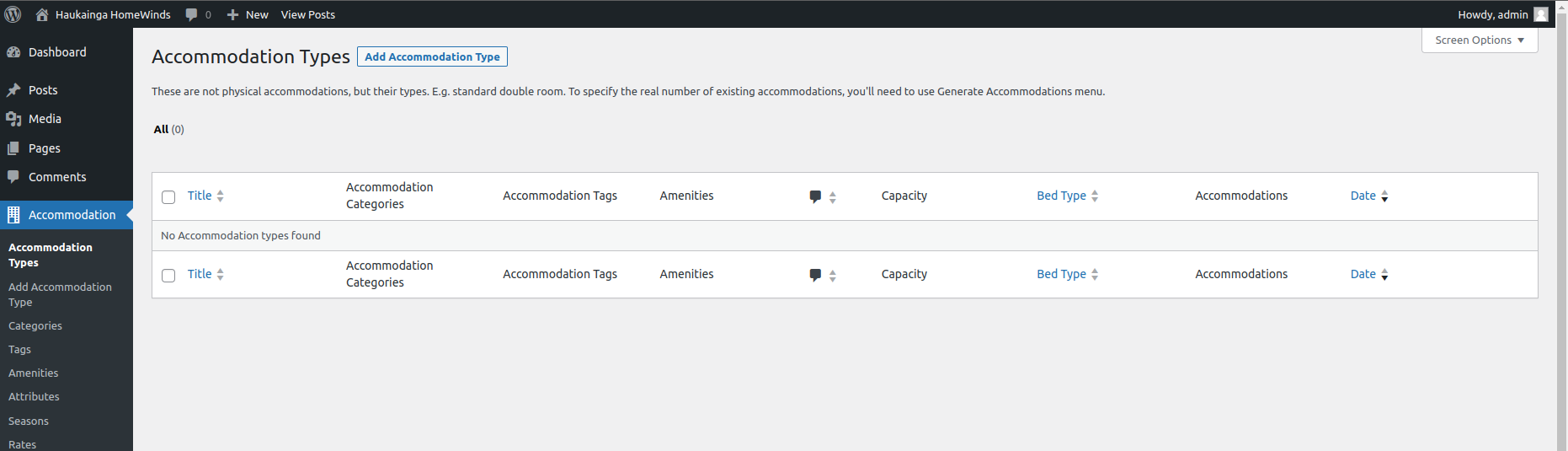


*Figure - Rates added*

## Create a Property

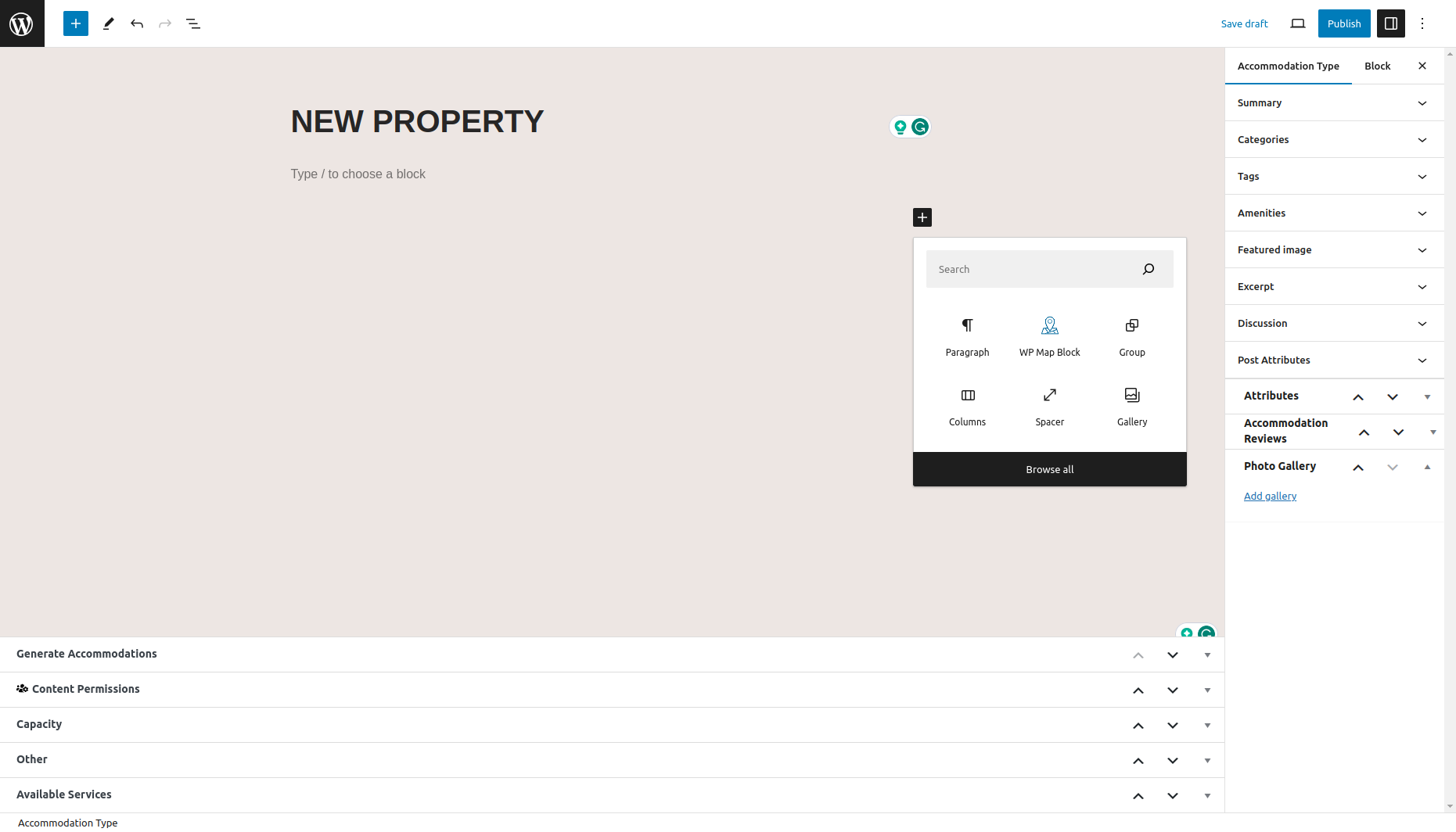
After the setup,￼ we are now able to create a new property entry. Properties can be added, edited, and deleted by administrators or the property owner.

Navigate to Accommodation/Accommodation Types (Figure ).



*Figure - Adding a new Property*

The property owner can use the WordPress editor to customize his property and include various “Blocks” to include media, descriptions, and a map showing the location (Figure ).



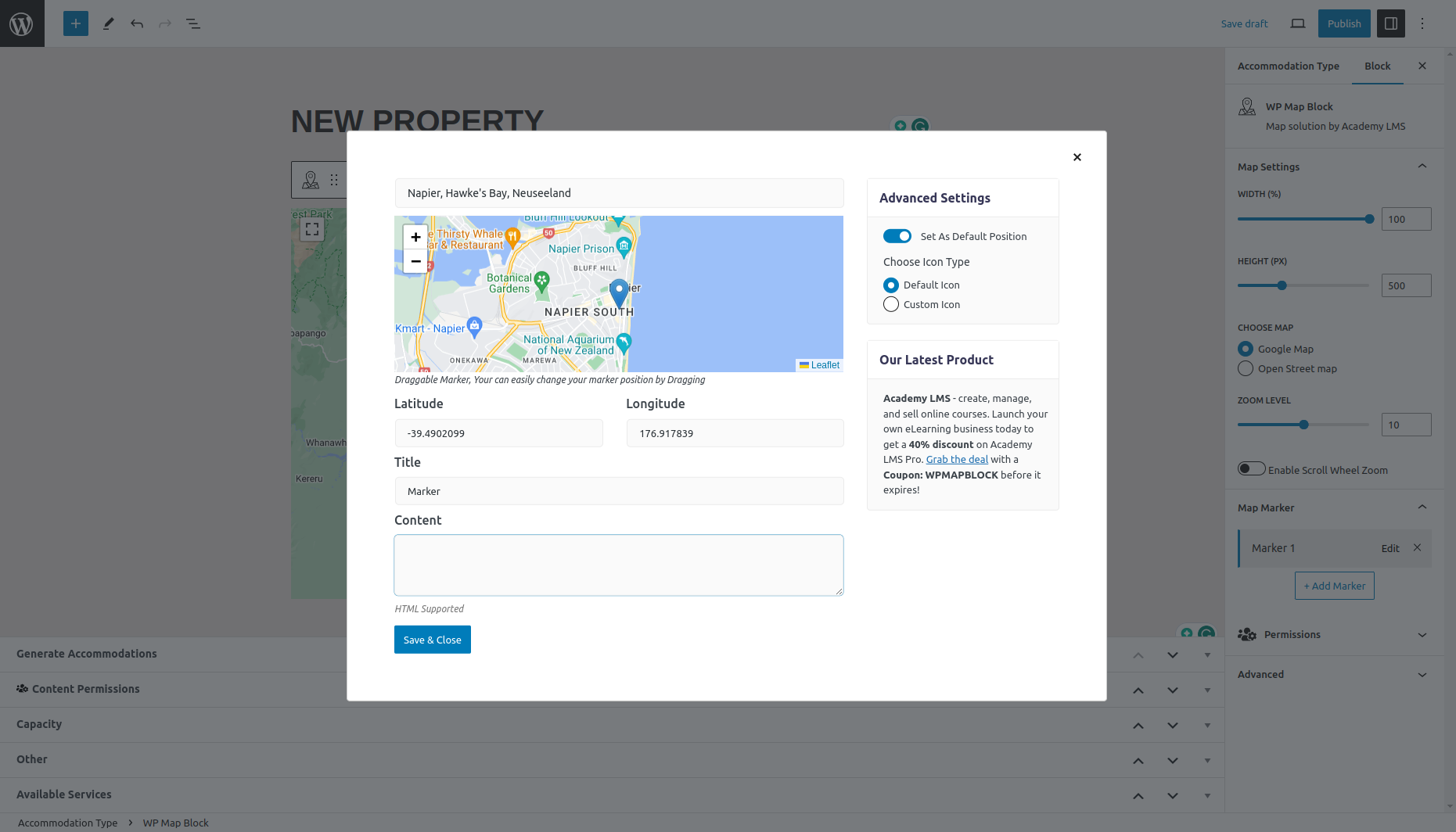
*Figure - Property Editor*

On the menu on the right side of the screen, you can add the previously created Categories, Amenities, and Attributes. A Feature image and excerpt can be added that gets displayed while the user is browsing through the property listings. Comments can be enabled in the Discussion tab. When using the “Pro” version of the Hotel Booking Plugin, the review and rating functionalities can be enabled. A photo gallery can be added to include more images showcasing the property.

The menu on the bottom of the screen allows the property owner to set the capacity of the property, adding “View” tags to give more details about the location. The bed type can be selected. These get added in Accommodation/Settings. Services can be added.

“Generate Accommodations” must be set to 1. A property only exists once, but this functionality can be used for listing rooms or multiple houses with the same specifications.

The client requested a map feature to be available to add to the properties. This can be achieved by adding a WordPress Map Block. Navigating to the Block settings on the right allows the property owner to change the marker location (Figure ). The size and placement of the map can be easily adjusted using the Editor.



*Figure - Adding a map*

To finish the creation of the property we can publish the site at the top right of the screen. The Property is now available at the site. To make it bookable we will continue with the booking management guide.

# Booking Management

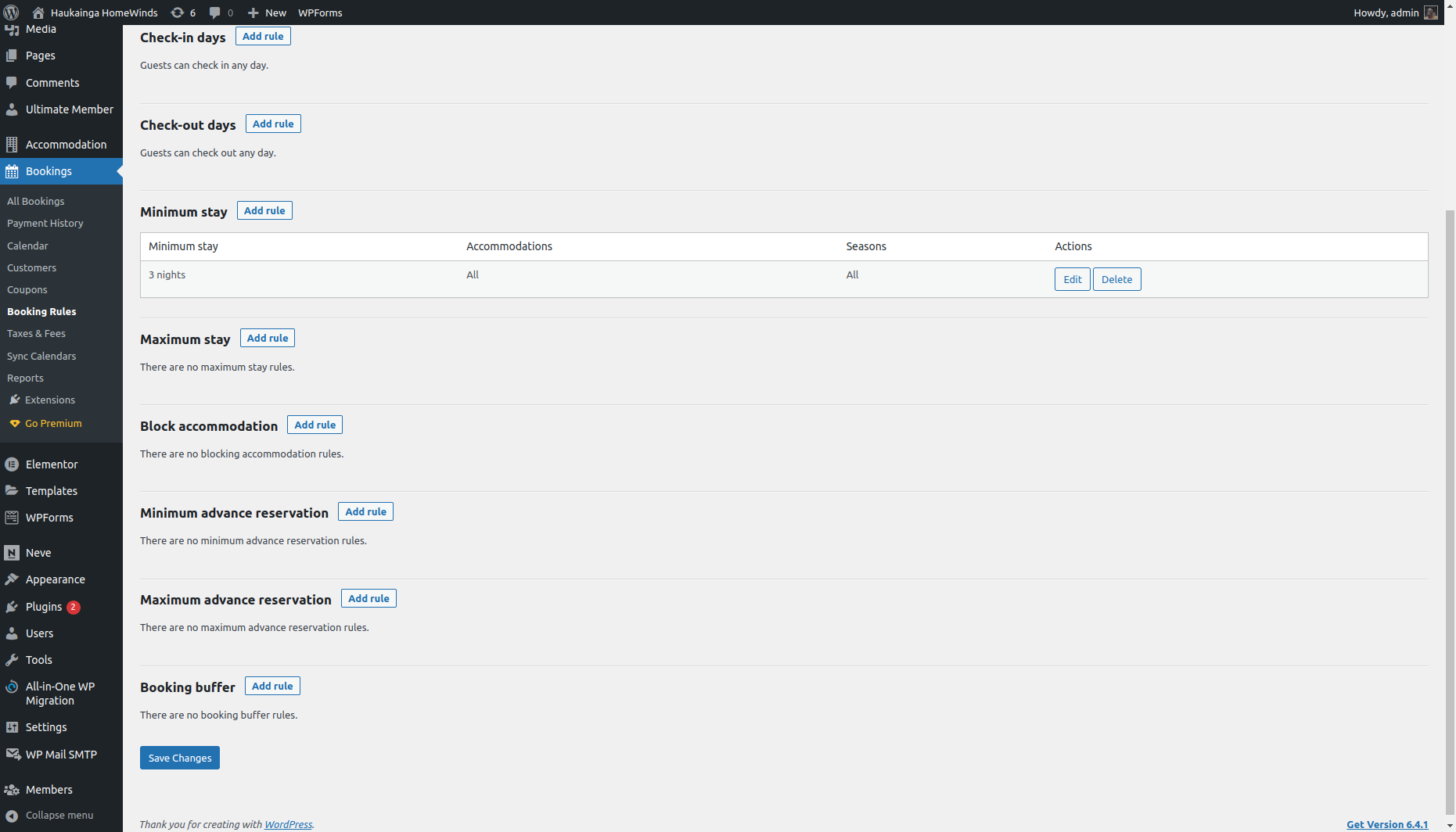
After adding a Property to the website, we can continue managing the bookings.

In this guide, we will look at different settings and options to allow and manage bookings of properties.

## Setting up

### Booking Rules

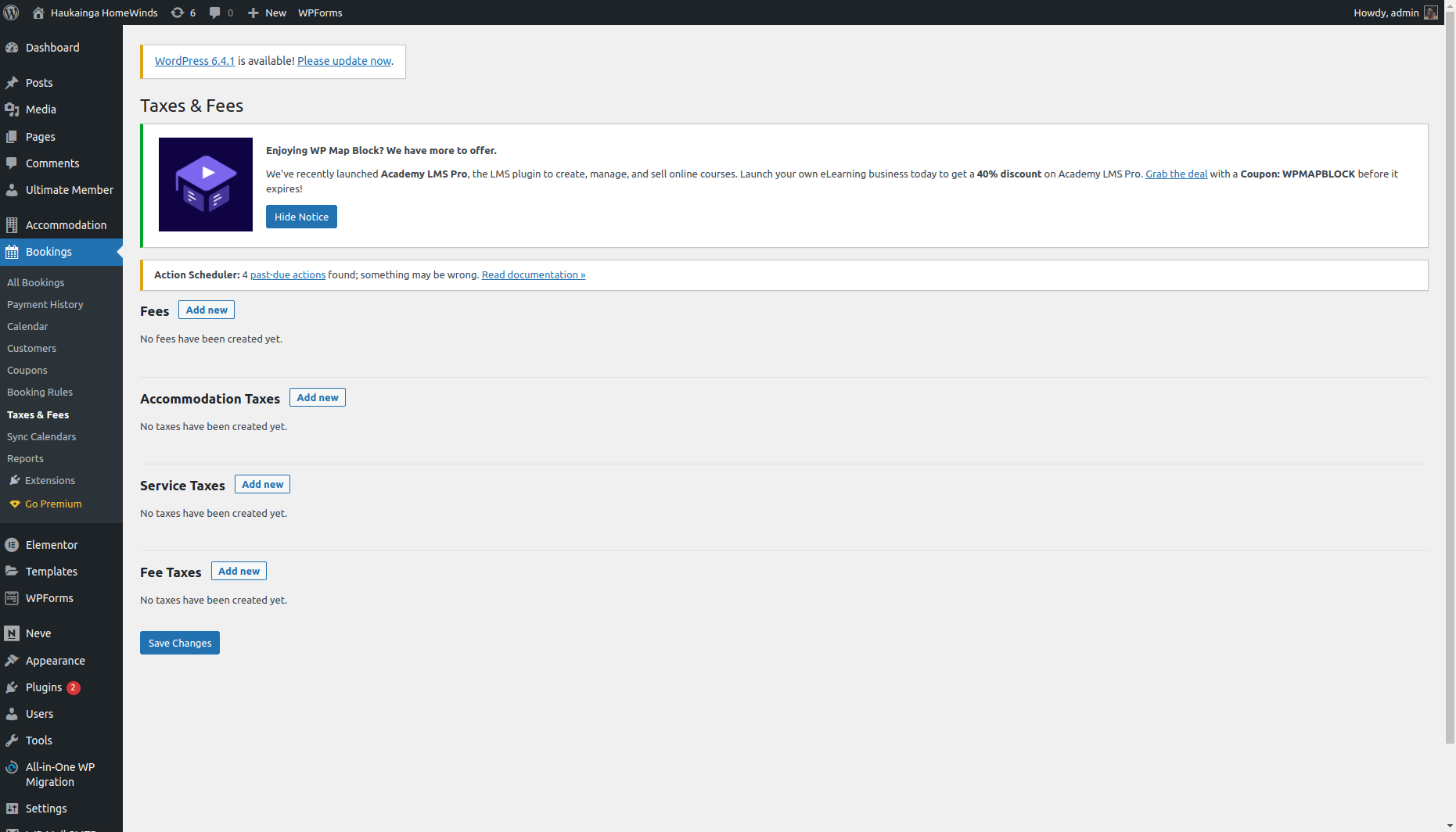
Navigate to Bookings/Booking Rules (Figure ). Here we can add several rules that get applied for booking the properties. The property owner can edit check-in/out times and minimum/maximum stay times. Blocking, buffering, and rules for booking in advance offer extended management options.



*Figure - Adding Booking Rules*

### Taxes and Fees

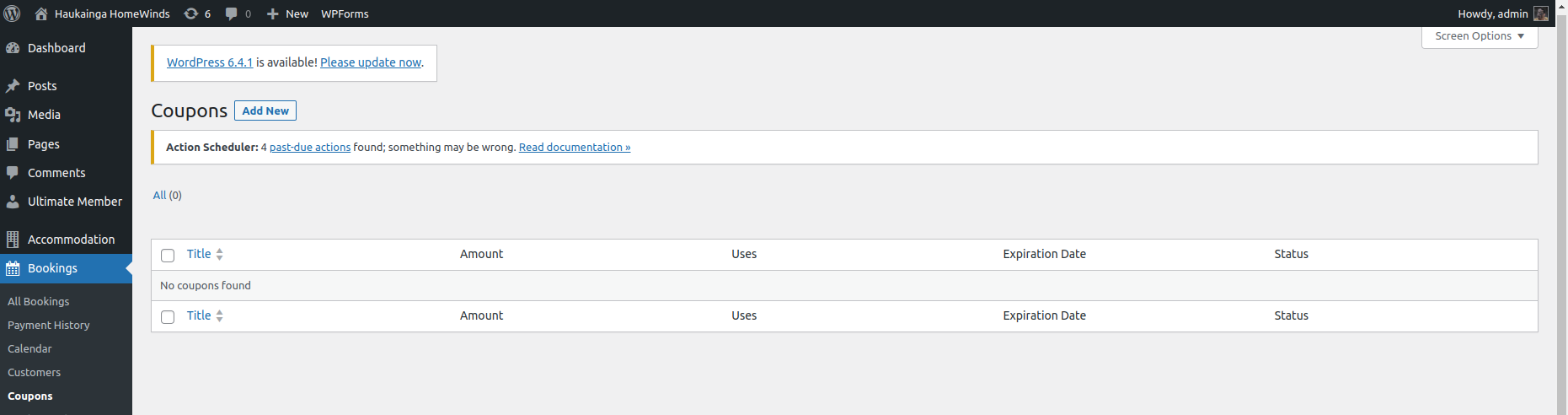
Navigate to Bookings/Taxes and Fees (Figure ). There are multiple options to add additional taxes and fees.



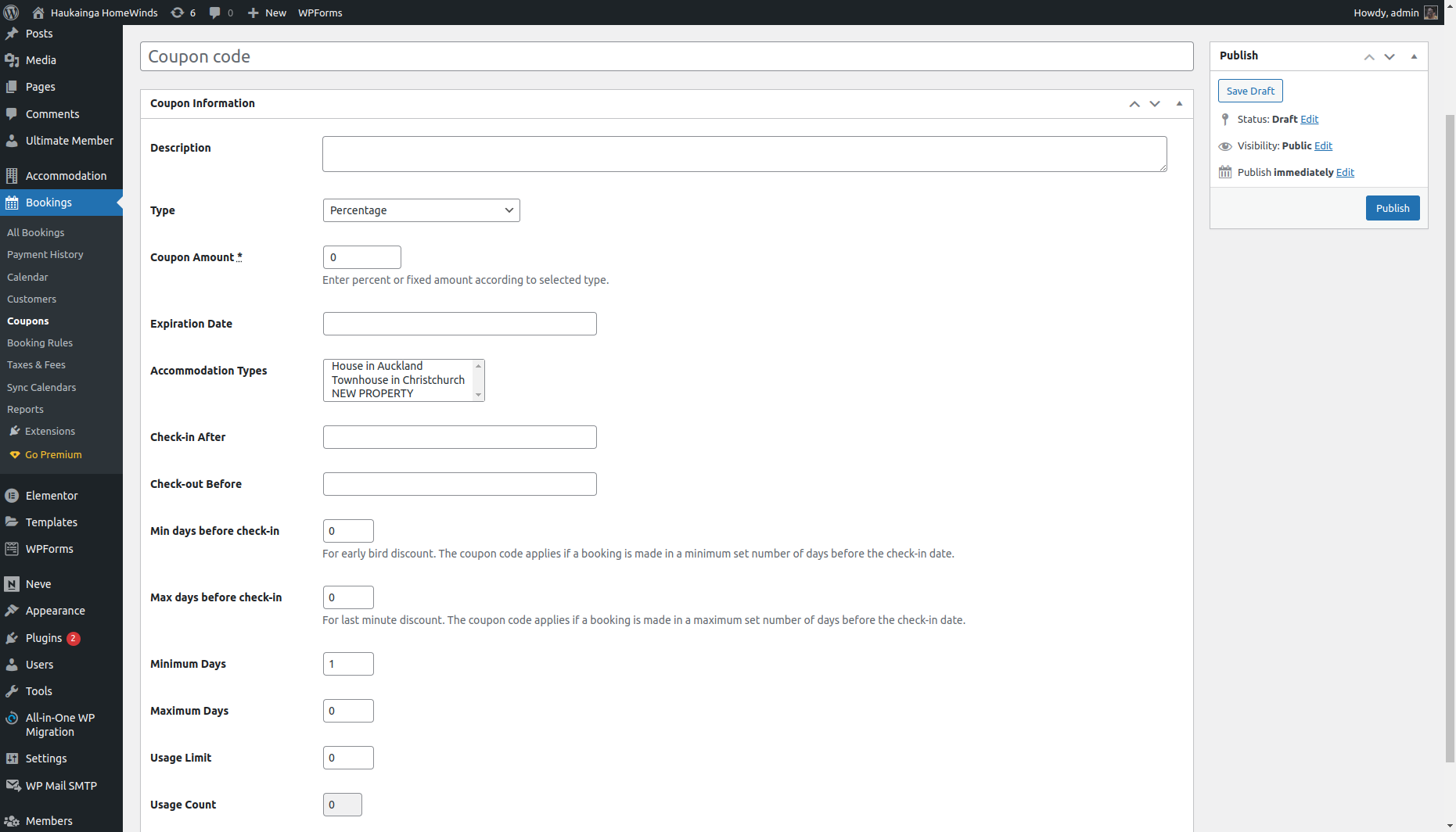
*Figure - Adding Taxes and Fees*

### Coupons

Navigate to Bookings/Coupons (Figure ). Property owners might want to offer special discounts or coupons for advertisement reasons. Coupons can be configured in various ways to match the requirements of the property owner (Figure ).



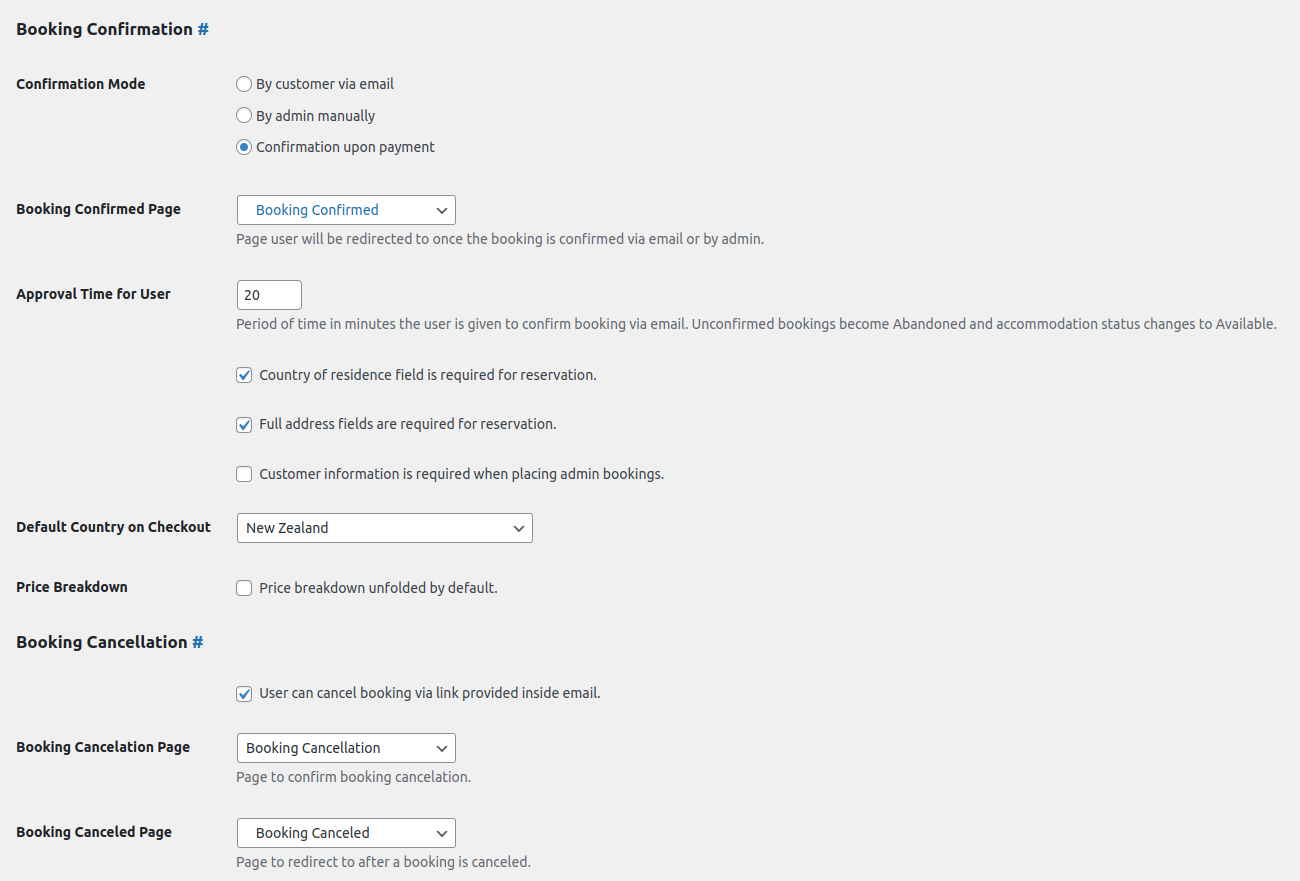
*Figure - Adding Coupons*



*Figure - Creating a Coupon code*

### Booking Settings

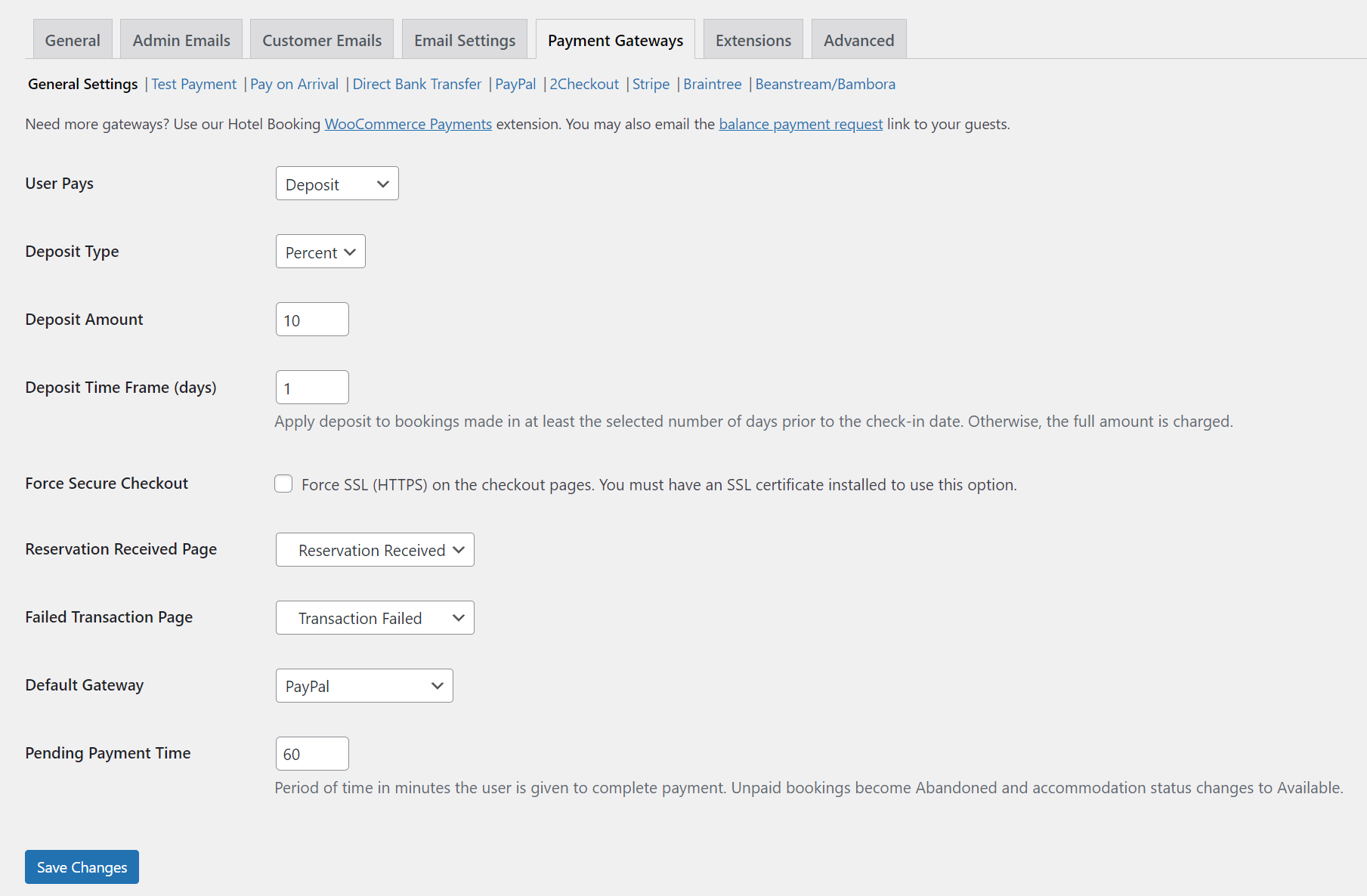
Navigate to Accommodation/Settings/General. Here multiple Booking related settings can be adjusted. Currency, country settings, and redirection pages (Figure ). We adjusted the setting suitable for our development and testing phases. We encourage the client to alter these settings to match the requirements.



*Figure - Booking Settings*

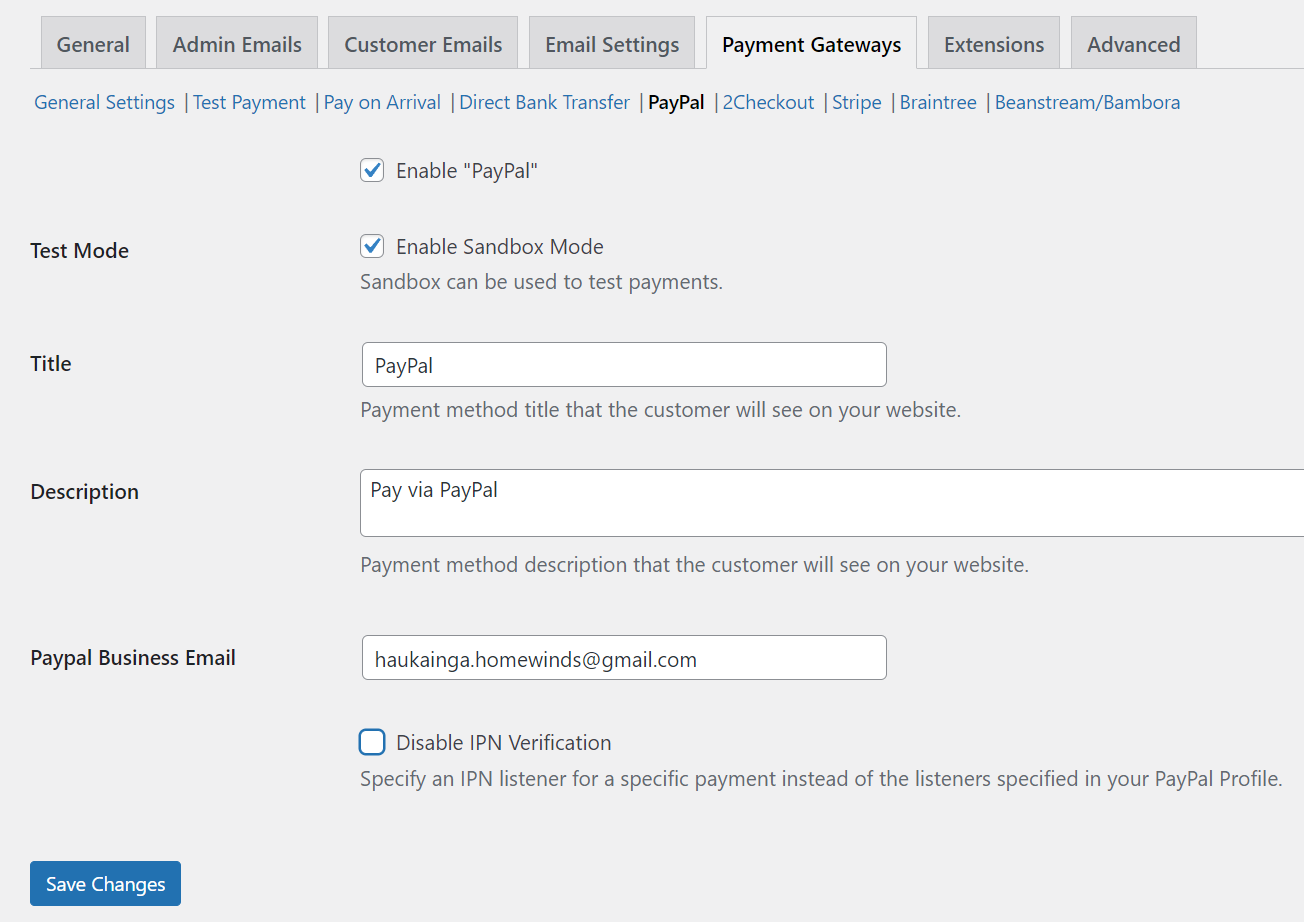
### Payment Gateways

Navigate to Accommodation/Settings/Payment Gateways. Firstly you will be sent to General Settings, where you can adjust some payment parameters such as payment type(Deposit/Fixed), payment time, some payment related pages directions, default gateway and payment pending time. The client can adjust all those settings according to their preferences.



*Figure – Payment Gateways General Settings*

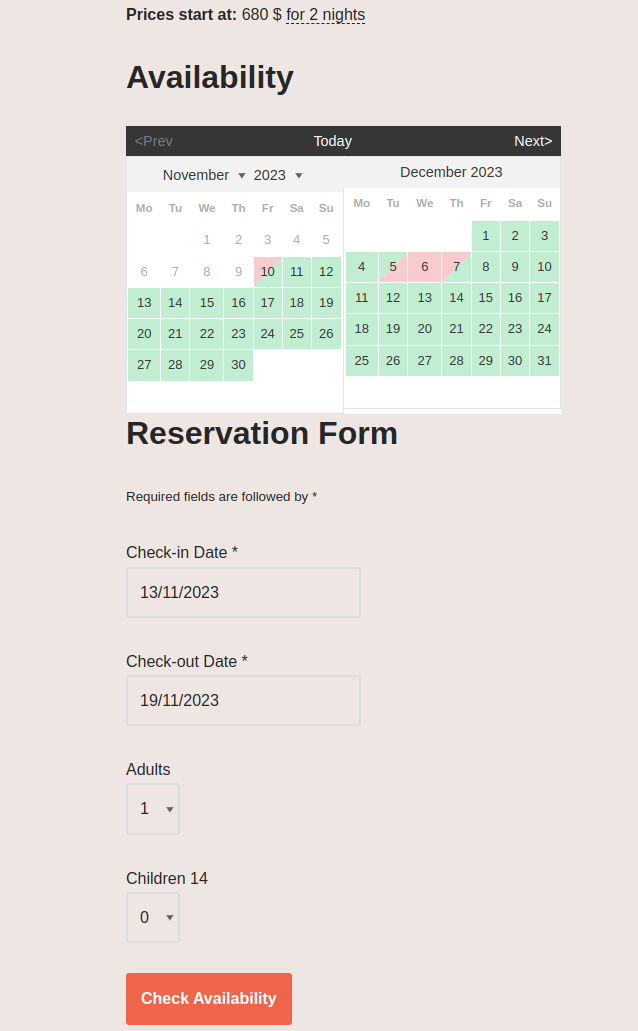
Under the main settings option above you will have sub menu of payment gateways below in blue colour, where you can navigate throw all the payment options and set each individually. For current stage of project, we only set up Pay on Arrival and Direct Bank Transfer only. However, PayPal option could be added as well, but after some research we found that it requires PayPal business account and Refence Payment option enabled through contacting PayPal Support Team. Moreover, there are plenty of other payment options, which can be added by upgrading the Hotel Booking Lite plugin to premium version. As it has been said above, it all be added by client preferences for payment gateways. As example you can see the PayPal gateway setting (Figure), where you will need to add your PayPal business account email address.



*Figure – Paypal Gateway Settings*

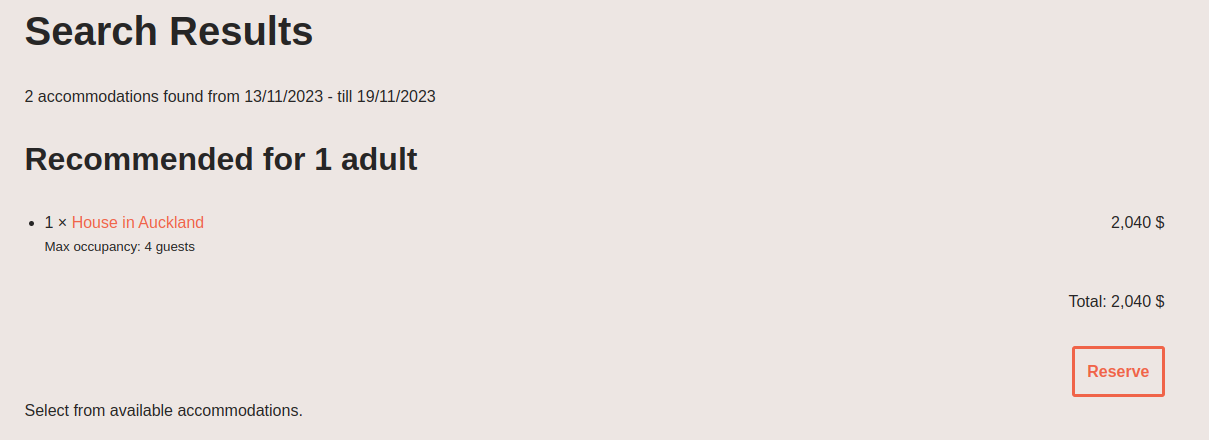
## Placing Bookings

After setting up the property and booking information, we can start placing bookings.



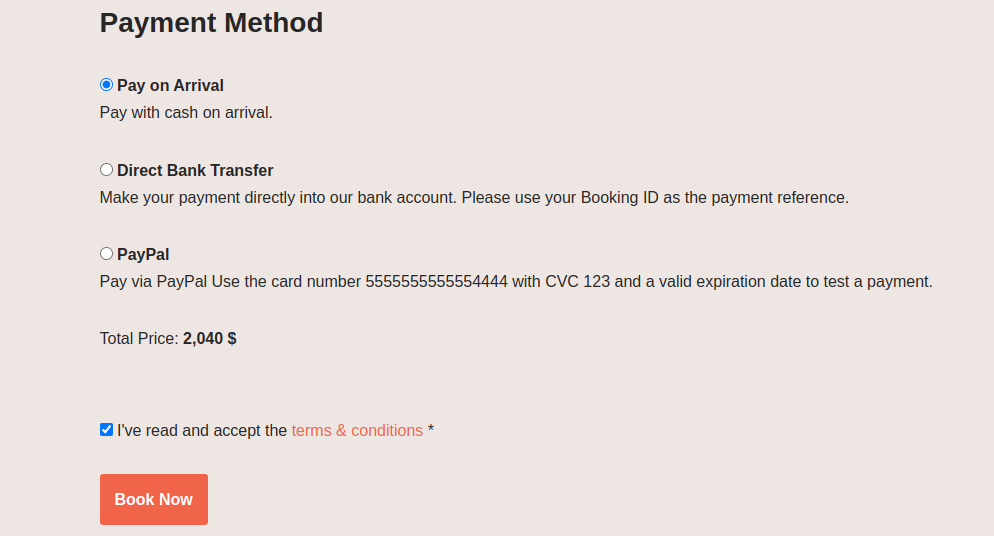
To place a booking we need an account. Please refer to …. to see how to create an account or log into an already existing account.

Navigate to a property to place a booking. At the bottom of the property entry, we find the availability calendar and a reservation form (Figure ). After selecting Check-in/out dates we can place a reservation (Figure ).



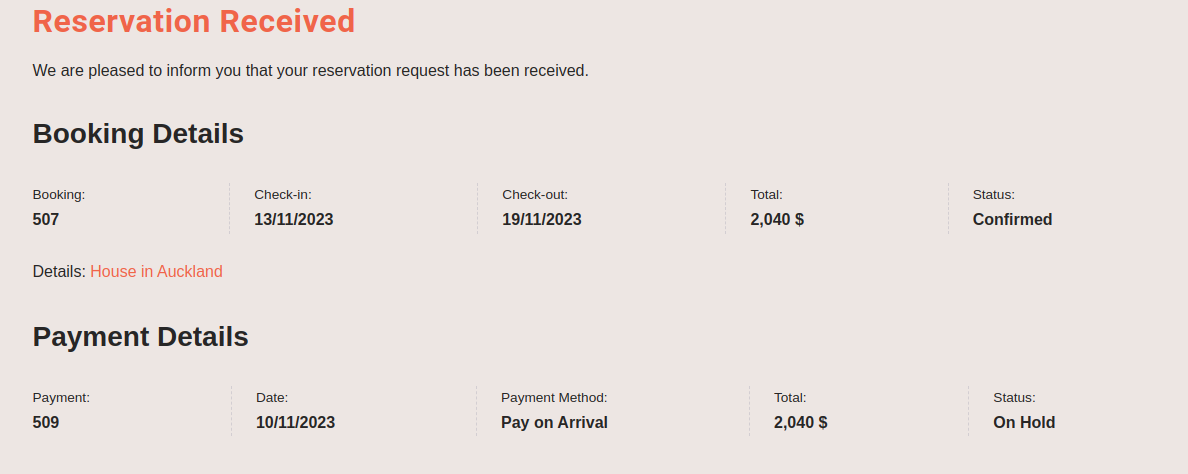
*Figure - Reserve Figure - Check Availability*

You will be asked to enter relevant personal information, select a payment method, and accept the terms & conditions (Figure ). By pressing “Book Now” the booking gets placed and the user gets redirected to the “Reservation Received” page as well as an e-mail notification with relevant booking information.



*Figure - Placing Booking*

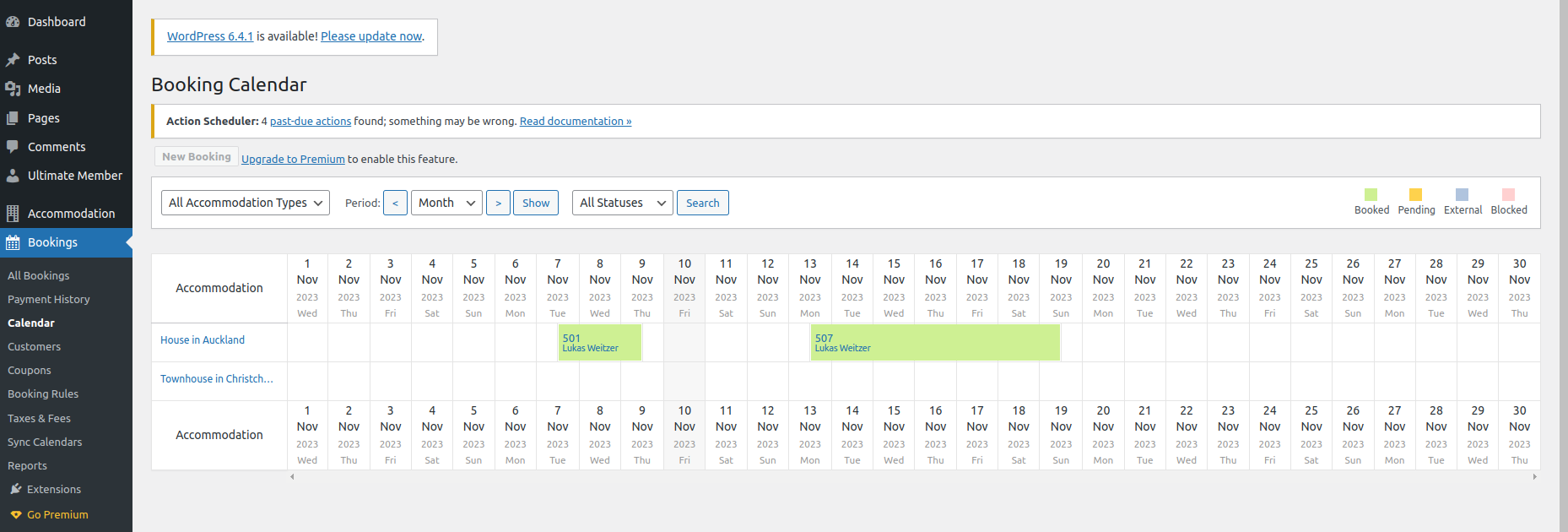
Depending on the previously chosen settings as well as the payment method the status of payment and booking can be confirmed or on hold (Figure ).



*Figure - Reservation Received*

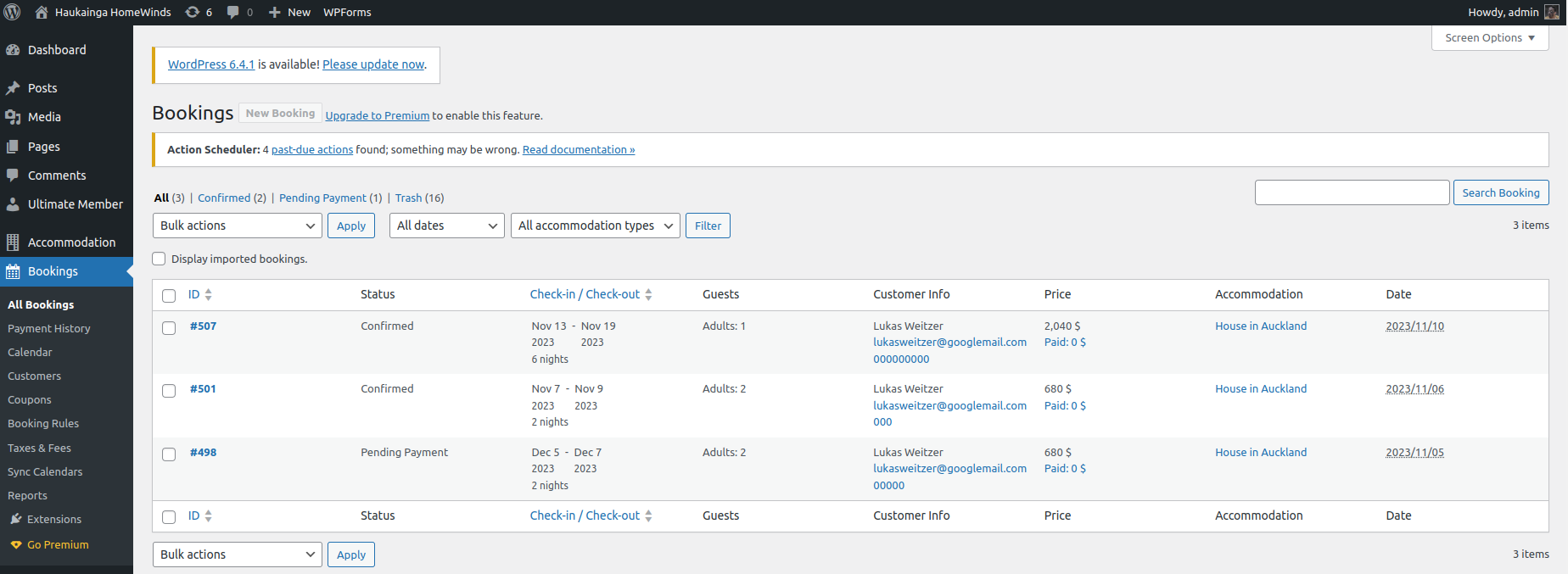
## Manage Bookings

￼Navigate to Bookings/Calendar (Figure ). This overview presents all bookings and their status. Booking details can be viewed and payments added manually (Figure ).



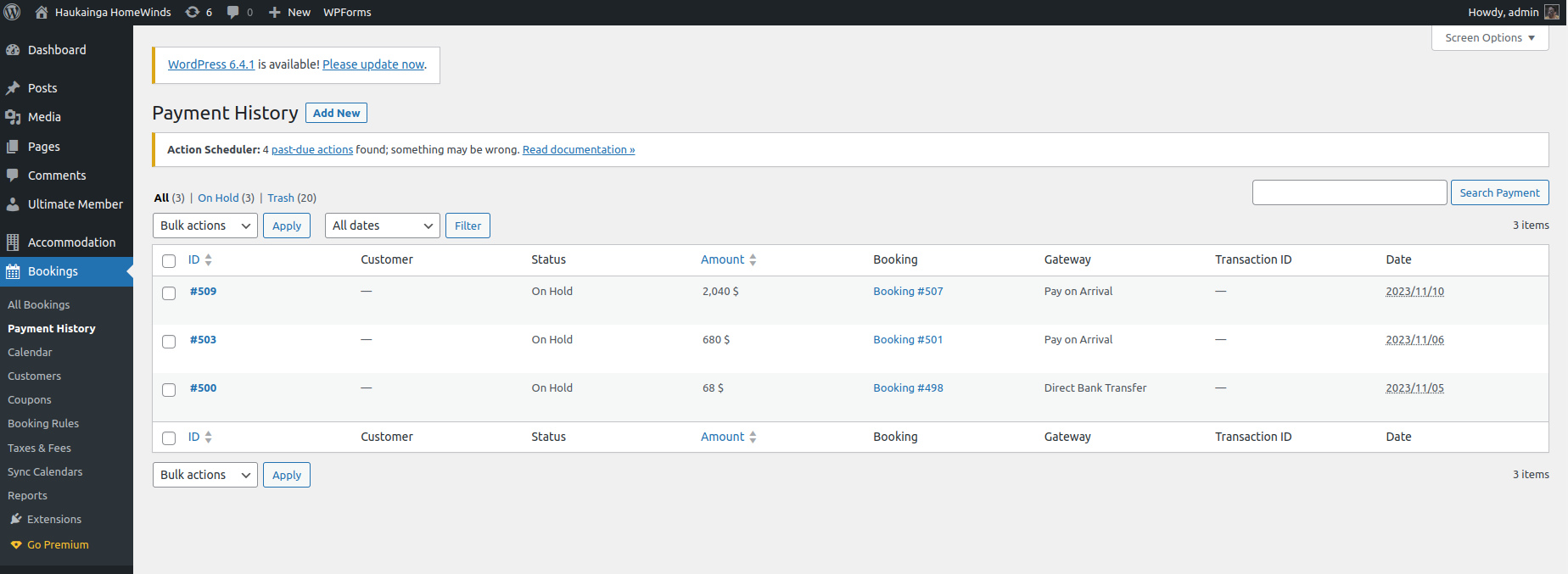
*Figure - Booking Calendar*

Bookings can be viewed, edited, and deleted when navigating to Bookings/All Bookings (Figure ).



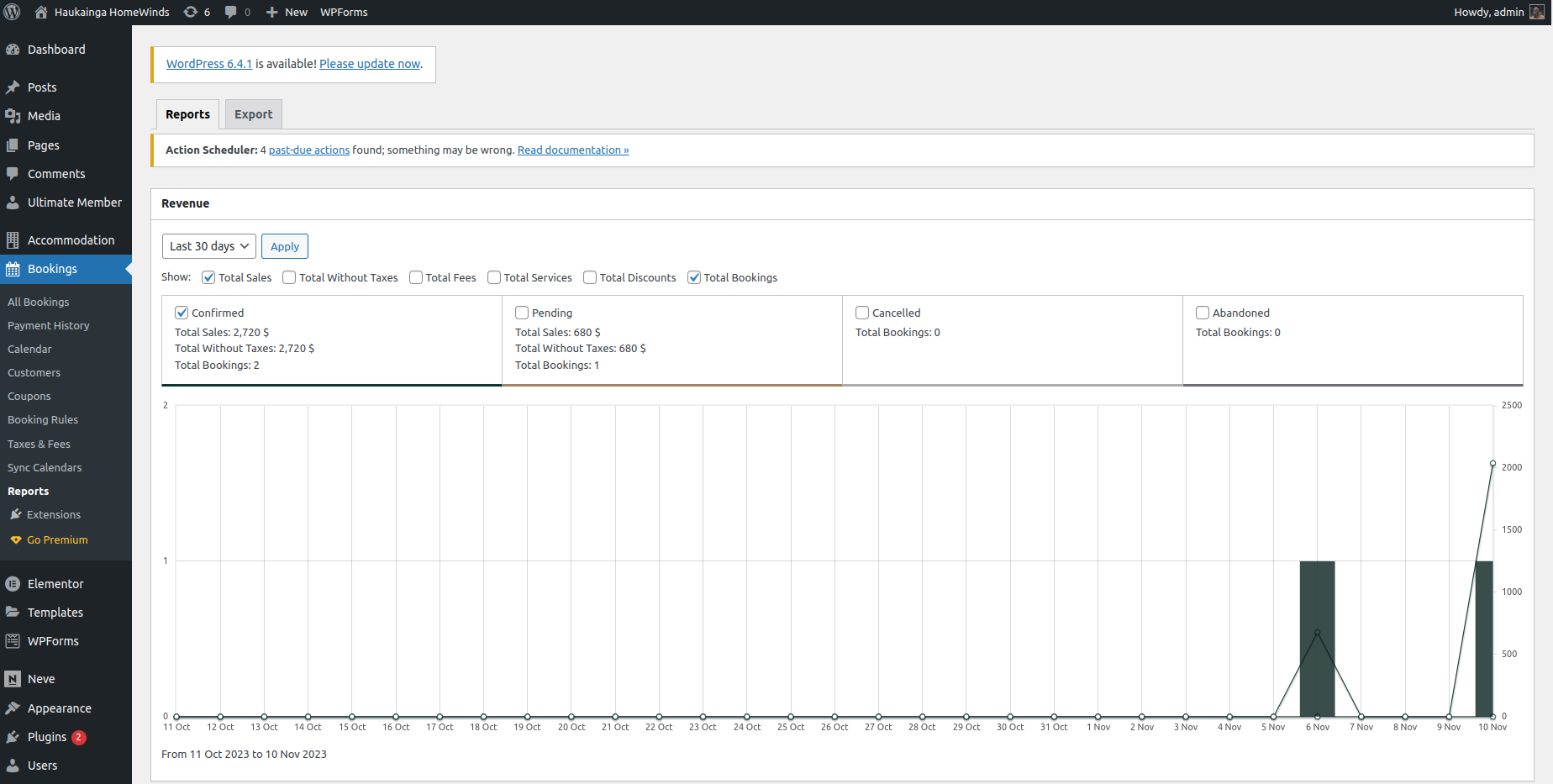
*Figure - All Bookings*

Payments can be viewed, edited, and deleted when navigating to Bookings/Payment History (Figure ).



*Figure - Payment History*

Navigating to Bookings/Reports displays a report of business activities (Figure ). When upgrading the Hotel Booking Plugin these results could be exported as a CSV.



*Figure - Reports*

# User Management

User Management is an essential part of this project because users need an account to make any bookings. There are two options how to gain that permission. Either the user creates a new account or he/she logs into an exisiting account. We have implemented two distinct pages to accomplish these operations.

User Login

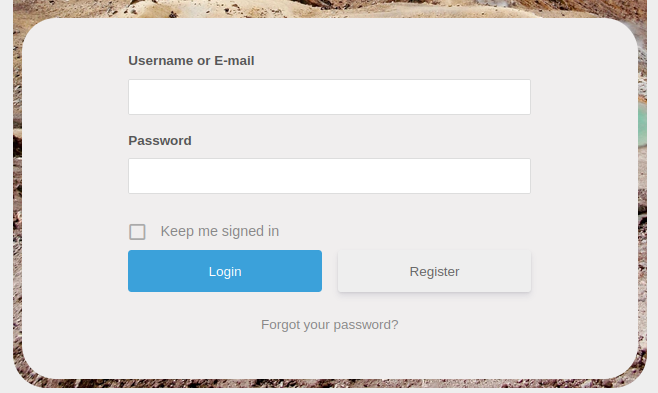


Figure : User Login

Figure X shows the login field, where users with an existing user account can log into their account. Required is the username or email address as well as the password of the account. All these details are determined in the registration process. Users can also reset their passwords in case they forgot it. In this situation, they follow the respective link at the bottom of Figure X, which redirects them to the page of Figure Y.

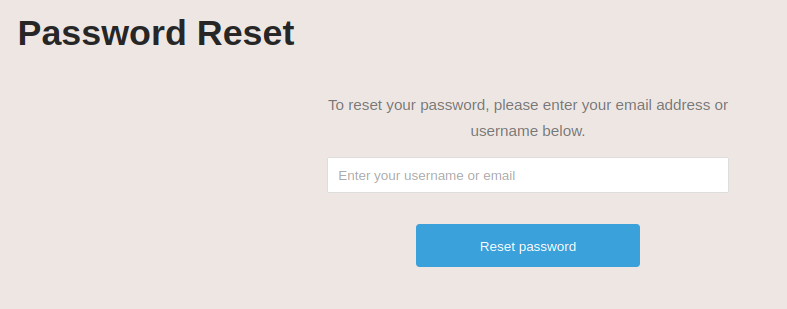
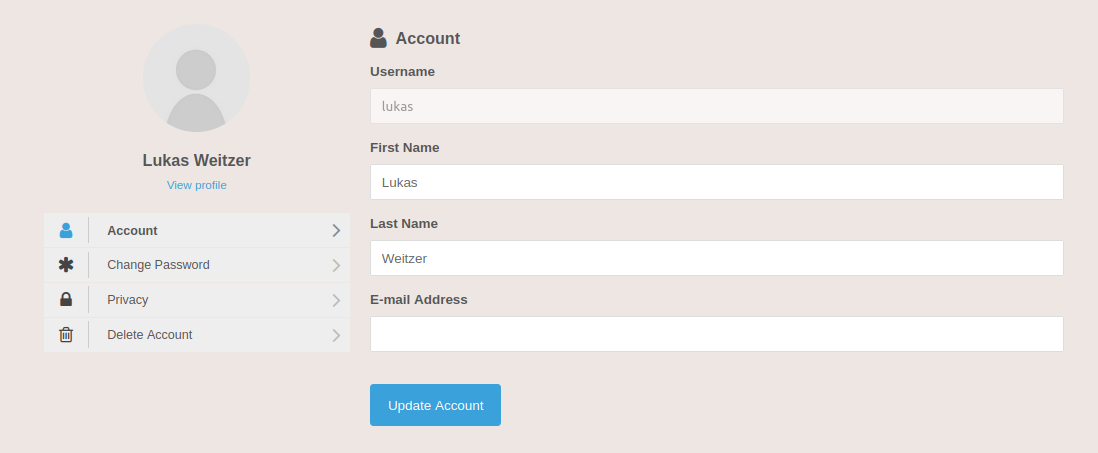


Figure Y: Reset password

After inserting the username or email address, an email with instructions to change the password is sent to the user.

After logging into the account, the user is redirected to the account page, where he/she can view and edit the details of the user. On this page, they can also change the password and delete the entire account. This page can be seen in Figure Z.

Figure Z: User account

Once logged in, the user can start to book properties.

1. User Registration

For the user registration, we created a new page which contains all the fields that are needed to generate a new user account. These fields can be seen in Figure A.

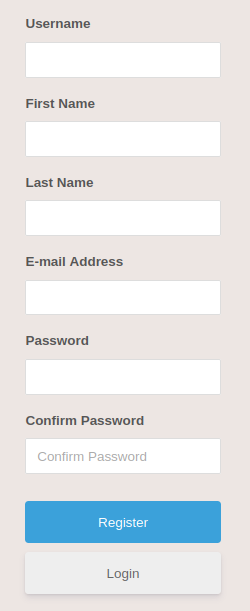
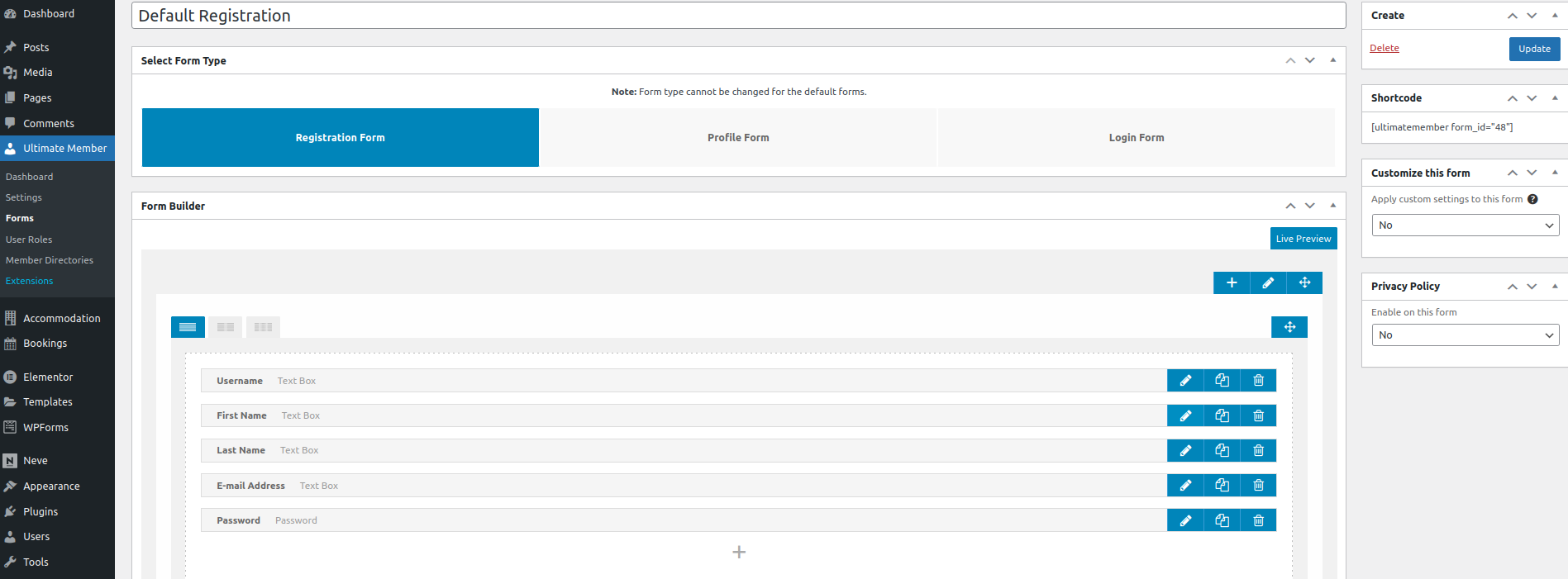


Figure A: User Registration

There are multiple fields that the user has to fill in. There are also some rules in place to ensure that accurate data is entered by the user. For example, the user name must be longer then three characters, the email address needs to have a proper structure and password needs to meet certain standards (at least eight characters with numbers, captical and lower case letters). Only when all these criteria are met, then an account can be generated.

Figure B: Editing these forms

The rules for registration can be edited by the administrator by opening the tab „Ultimate Member“, selecting the wanted form and making changes to it. To edit a single input field, the admin needs to click on the pencil icon of the respective field to make changes to it.

It is important to note, that the default roles of new accounts is „Hotel Customer“. This role has the most basic permission and can only navigate through the webiste and make bookings. To change this default role, the admin can do this in the settings tab of the plugin „Ultimate Member“. This can be seen in Figure C.

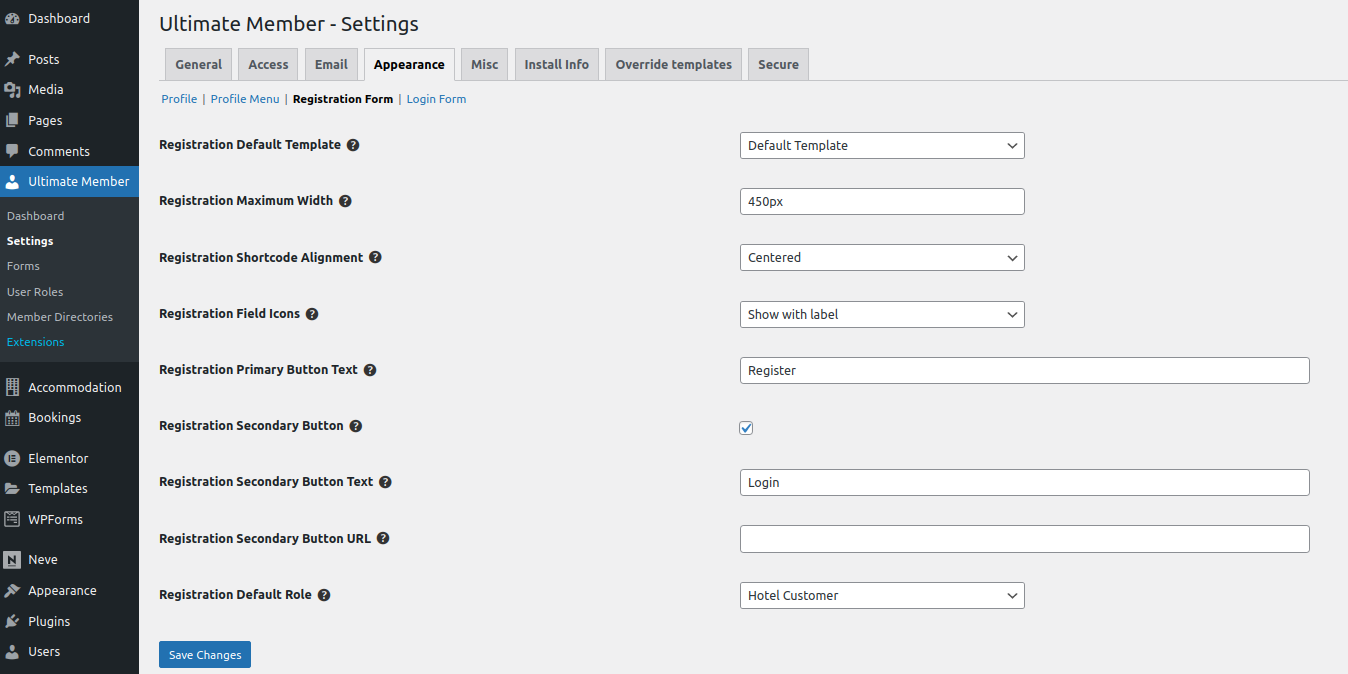


Figure C: Changing the default registration role

1. Property Owner Role

To generate, edit, publish and delete personal accomodations from the website, we created a new user role called „Property Owner“. This role cannot interfere with the settings of the website itself but can use the booking and property managment utilities. Accounts with this role need to be created by the administrator manually. The credentials can then be sent to the home owners.

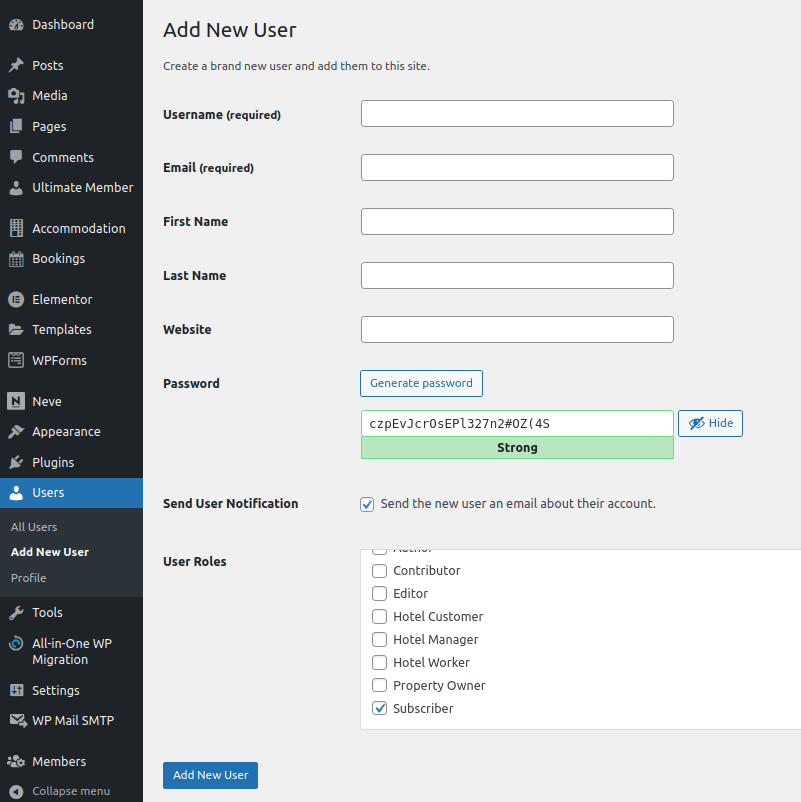
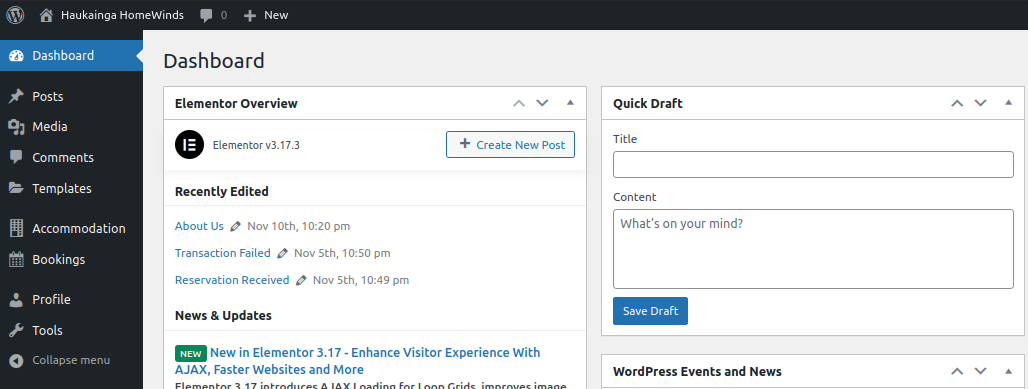


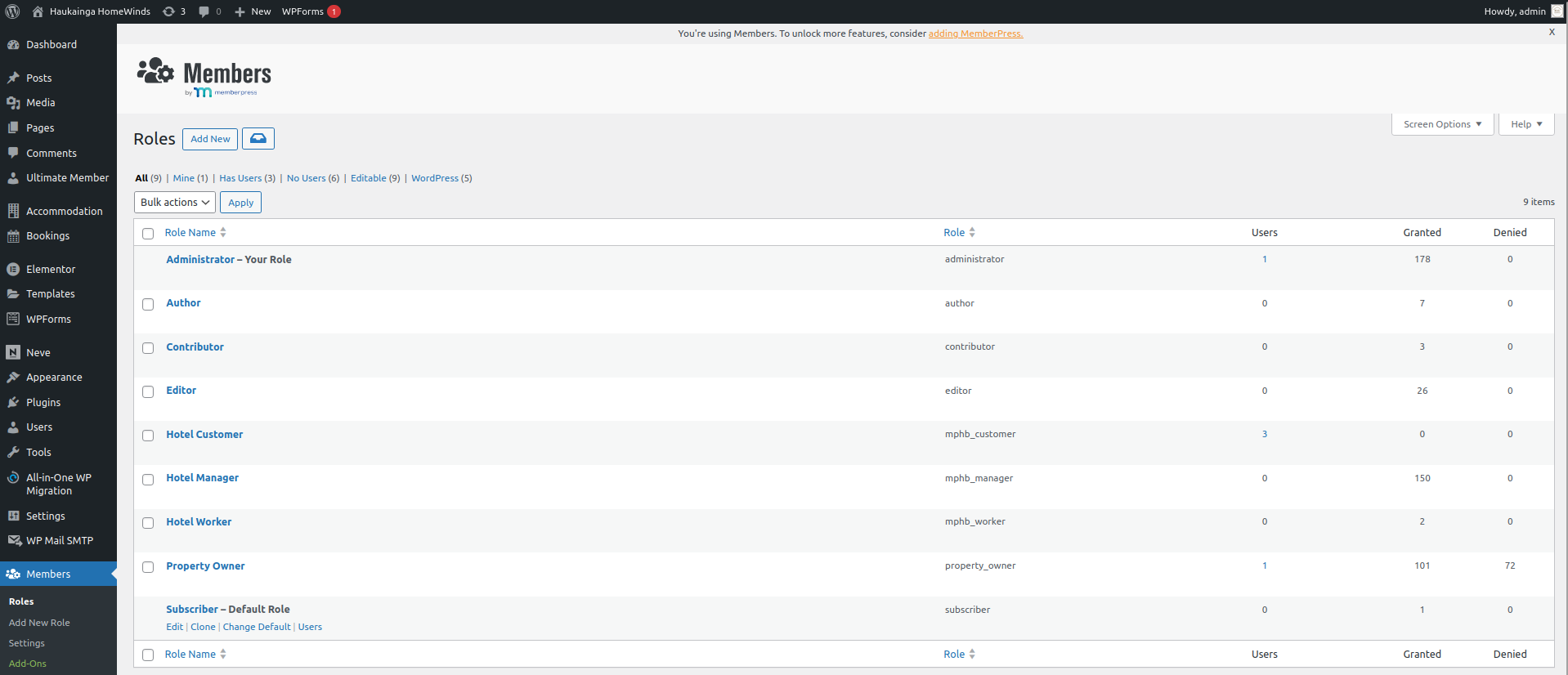
Figure D: Creating a property owner account

To create this account, the administrator needs to navigate to the Users-tab, click on „Add new user“ and fill in the required fields. It is important to set the correct role at the end. This can be seen in Figure D.

Property owners are able to enter the wordpress dashboard, but will have a very limited list of options. As can be seen in Figure E, they and manage their accomodations and bookings, but cannot modify any other parts of the website.

 Figure D: Wordpress dashboard for property owners.

In case the administrator wants to change the capabilities of this (or any) role, this task can be done in the „Members“ tab within wordpress.

Figure U: Changing capabilites of different roles

By clicking on the edit button of any role in Figure U, the selected role can be modified to have certain capabilities.

# Additional Features

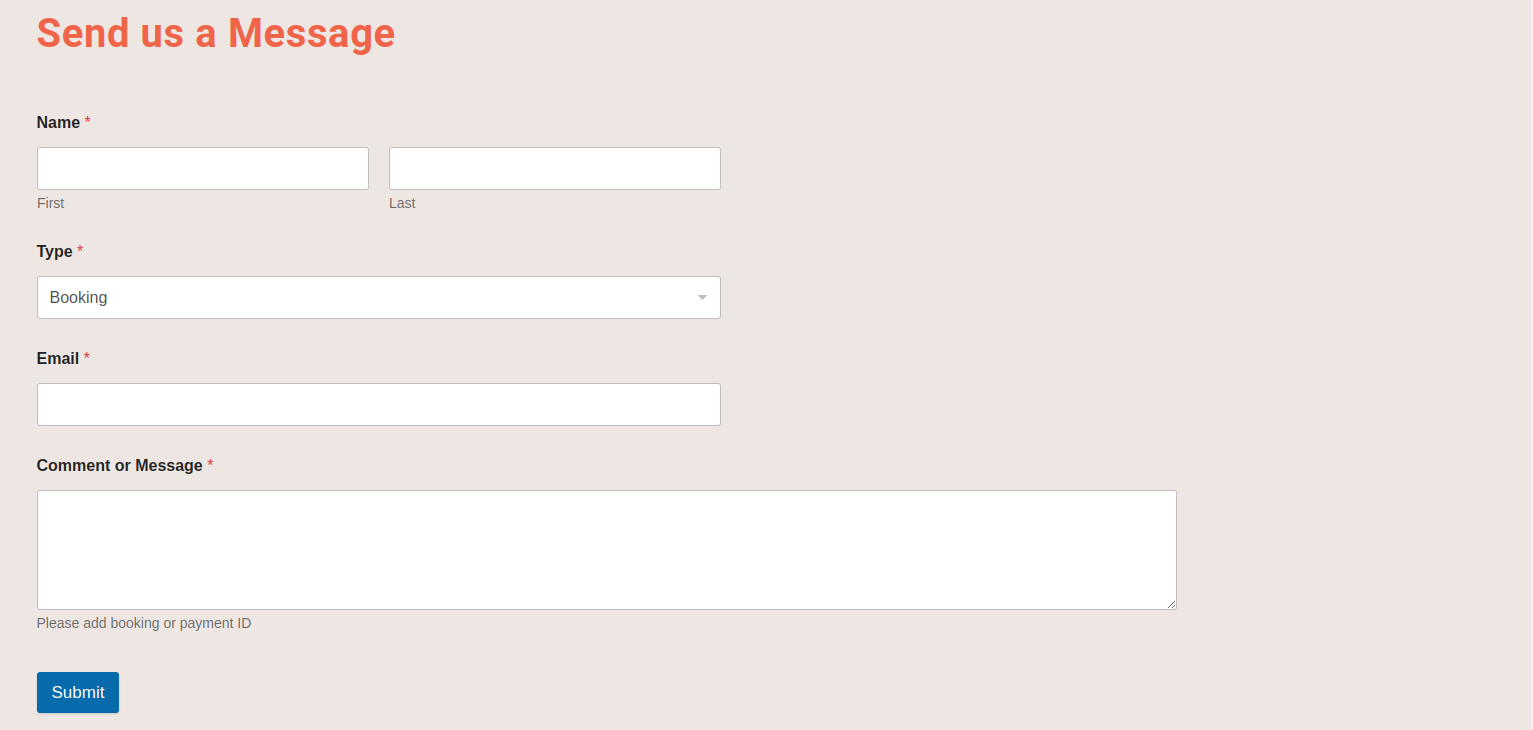
## WP Mail SMTP

Navigate to WP Mail SMTP. To test the e-mail services of the Hotel Booking Plugin we used the WP Mail SMTP Plugin. The Plugin comes with a Setup Wizard and supports various mail service providers. We used a mail account at Google. To set up this feature please refer to the Plugin documentation and follow the instructions provided by the Setup Wizard.

To alter the e-mail notification of the Hotel Booking Plugin navigate to Accommodation/Settings and alter the E-Mail settings.

## WP Forms

Navigate to WP Forms. We are using the WP Forms Plugin to provide users to contact the site administrator (Figure ). New Forms can be created and used as “Blocks” in the WordPress or Elementor Editor. Please refer to the Plugin documentation or hints when creating a new form.



*Figure - Contact Form*

## 

# 

Sending Emails

For Testing porposes we used the plugin “WP Mail SMTP” to connect an external email service provider for sending all business related emails. They offer a wide variety of email providers to choose from. In our Testing scenario we used googlemail. The setup process is fast and easy. Tutorials are provided by the plugin to help during setup.

We would recommend choosing a hosting provider with email capabilities.