

## **Checklist for setting up Automated Emails in Booking Management**

- Emails:** Draft your emails in the Templates section of your Homeowner Center. We provide sample templates, but feel free to edit as you wish and save as a new template.
  - Payments
  - Pre-Arrival
  - Pre-Departure
  
- Attachments:** Create your attachments for the Pre-arrival and Pre-Departure templates as a .pdf on your computer.
  - Create a welcome packet to attach to the Pre-Arrival template.
  - The welcome packet should include information about your home that would be helpful to the guests prior to arriving at your home:
    - Street address of home
    - Owners' contact info
    - Check-in and check-out time
    - Entry info
    - Items provided (linens, beach equipment, etc.)
    - Items *not* provided
    - Info about beaches, restaurants, food stores, etc.
  - Remember to make this generic so it will be appropriate for all of your rental parties.
  - If you'd like an outline of this document, please just ask us.
  - You may also choose to include other attachments in the Pre-Arrival template about
    - Local beaches guide
    - Restaurant guide
    - Rules about pets
  - Create any attachments you might need for the Pre-Departure template
  
- Upload Attachments:** Go to Email Templates and Add Attachments to load them into our system.
  
- Link Attachments:**
  - Go back to your Templates
  - Select Edit on the Template of your choice
  - Scroll to the bottom to "Add Attachments"
  - Select the attachments
  
- Basic Settings:** Configure your basic settings in Booking Management
  - Set payment schedule
  - Add any additional fees
    - Cleaning
    - Linens

- Pet
  - Security Deposit
- Complete other fields that you'd like to configure

- Automated Email Settings:** In Booking Management, configure your Automated Guest Email settings
- Enable the Automated Emails that you'd like to send by checking the boxes on the left.
  - Choose the number of days before the due date to send the email.
  - Choose the template.
  - Preview the template and attachments that will be sent.
- Final Step: Apply Defaults** in any Booking Record that you want Automated emails to be sent.

#### Communications / Tracking

Item	<input checked="" type="checkbox"/>
Rental Rate	