Holiday Rent Pro

Revolutionizing the Rental Management Industry

Setup Guide

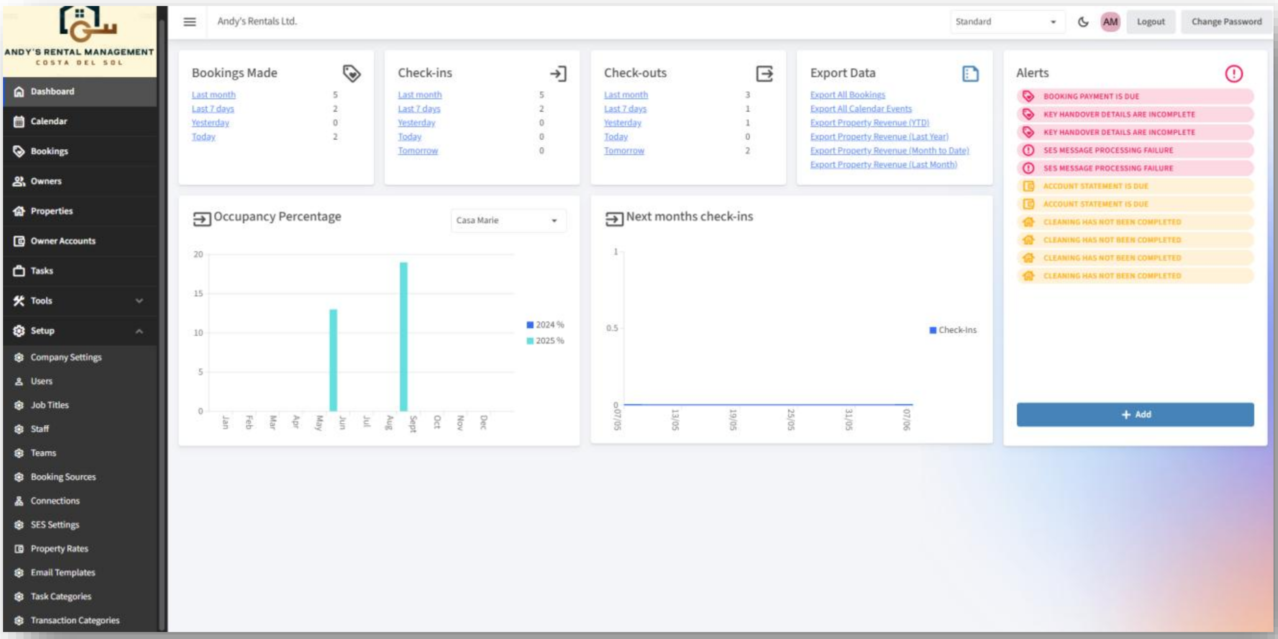
Welcome to Holiday Rent Pro, the software package that takes the strain of holiday rental property management. This guide will show you from start to finish how to set up your system, which should not take too long.

Please follow the steps in this document in the order listed below. Don't forget, if you need help you can contact us on holidayrentpro@marksonline.co.uk

Contents

First Time Login

Access the system using a web browser, go to the URL provided and enter your credentials. You should be able to access your dashboard:



Please make sure you now change your password by clicking the button top right corner as shown above.

You can access all the screens below in the left-hand menu under the “setup” section

Company Settings

This screen allows you to set core parameters which affects how the system will behave. It has several tabs, detailed below.

Main Tab

This tab allows the basic details of your company to be stored, if any details are changed make sure you click save afterwards. A company logo can be uploaded if required, this will appear on your system and the login screens.

Display Tab

The fields on this tab allow you to set some text for display in various places in the system:

- Client Sidebar Text – When logged in as a property owner, this text will appear on the left-hand side where the menu usually sits. Use it to welcome your guests, give them any notices or updates.
- Login Text – This text appears on the login screen for all users

Formatting Tab

The formatting fields allow you to specify the formatting of dates throughout the system, these should only be changed after consulting support to get the required formatting data.

Statements Tab

The statement footer text can be altered here. When a statement is generated for a client, this text is shown at the bottom. You can use it to give information about bank details for transfer, payment terms etc.

Booking Management Tab

The fields on this tab alter the behaviour of the system in relation to bookings.

- Deposit % - For bookings where you manage the payments, this is the amount of deposit required from the guest at the time of booking.
- Balance Required – This number determines when the remainder of the booking payment is due from the guest.
- Adult age from – This specifies the age at which a guest is considered an adult.
- Check in / out times – The time of check in / out for each booking.
- Send Arrival Details – This specifies the number of days before check-in that the system will send an email to the lead guest with details of their arrival, if an arrival template has been set up for the property.

Users

This screen allows you to add / view / edit users to access the system. The fields in this screen are as follows:

- Name – First, last
- Email – The user's email, which will be their login
- Roles, what you want the user to be able to do in the system. Administrator users can manage settings whereas standard users can't.
- A photo can be uploaded of the user if required, or the system will generate an avatar based on the user's initials.

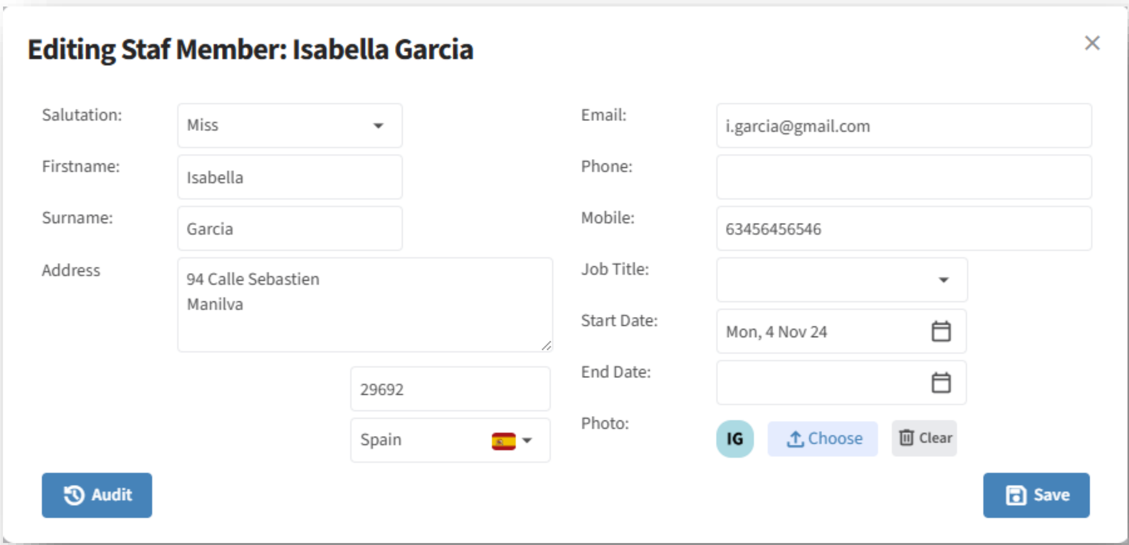
Note this is not for property owner users, these are set up under clients

Job Titles

This screen allows you to set up job titles that can apply to staff members. The system comes with some job titles built in but it's possible to add any if required.

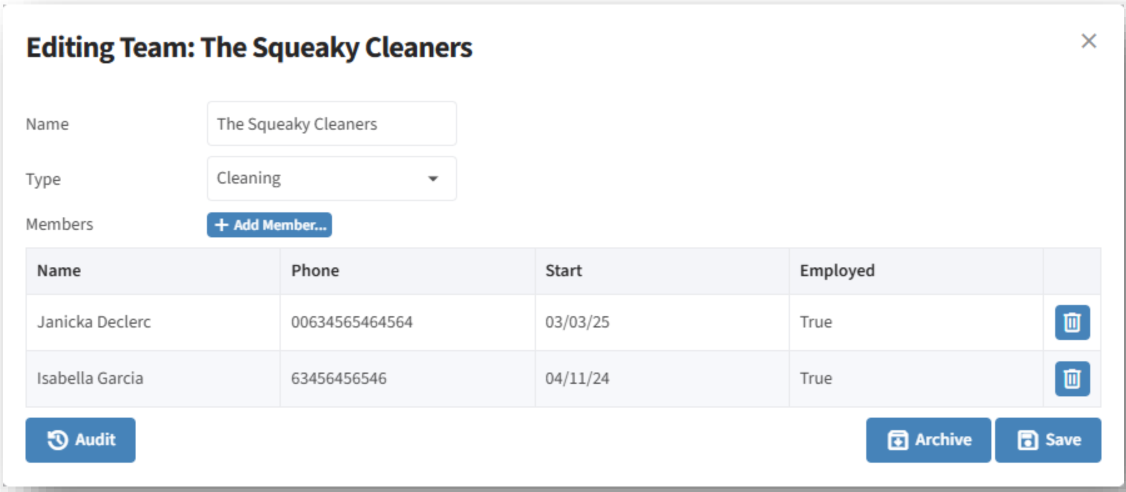
Staff

This screen shows a list of staff members and allows you to edit or add any as required. When editing a staff member, it's also possible to upload a headshot photo to help identify them, if this isn't uploaded then the system will generate an avatar with their initials.



Teams

Teams are groups of staff members. Each team is of a particular type (cleaning / maintenance etc.). This screen allows you to view / add / edit teams. A staff member can appear in any number of teams but can only be added to a team once. If you do not use teams, you may need to set up a team for each staff member as items such as cleaning require a team to be assigned rather than a single staff member.



Booking Sources

A booking source details where a booking came from and changes the behaviour of the system in relation to bookings made under that source. The fields are as follows:

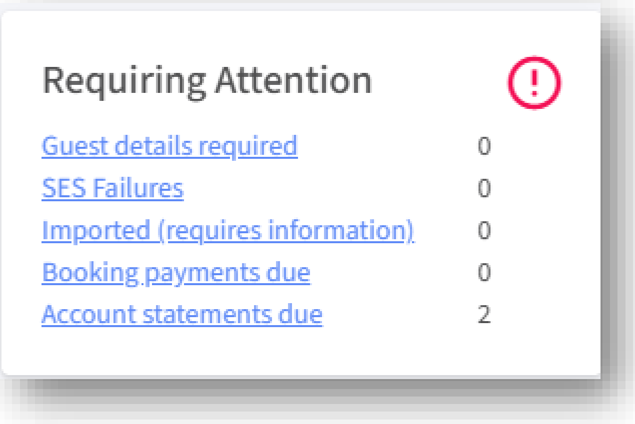
- Name – The name of the source
- Managed Payments – If the source manages payments on your behalf, you do not need to select this. If you deal with collecting payments then select this option, and the system will help you collect payments on time.
- Credit Client / Commission – If you select this and enter a percentage, any bookings that are entered into the system are credited to the clients account (minus commission). For example, if you take a booking on behalf of the client but subtract 15% you would select this and enter 15.
- Auto Booking Ref – This allows the system to generate an automated booking reference for you when the booking is made, though it can still be overwritten in the booking.

Connections

This screen allows you to set up connections to external platforms for a property and booking source.

For example, if you have a booking source "Booking.com", you can link the property to the calendar by entering the iCal URL (available on the "Share Calendar" feature on external platforms).

The system will automatically [nightly] pull bookings down and enter them for you, not only will the dates be retrieved from the platforms, but it will be up to you to enter the full booking information. Bookings pulled down will appear in the "Requiring attention" card on the dashboard.



To add a connection, the following information is required:

- Property
- Booking Source
- iCal [Import] URL – This is the URL provided by the platform to access the calendar
- Export URL – The system will generate an externally available URL for other platforms to access booking dates for this property. If you don't want to have this enabled, un-check the option.

SES Settings

This section is only applicable if you are going to use the system to collect and upload guest data and bookings to the Spanish authorities via the SES Hospedajes system (located here: https://sede.mir.gob.es/opencms/export/sites/default/es/inicio/).

To use this facility, you must have already accessed the SES system using your digital certificate (or other means) and registered the properties and clients as landlords. You must also have set up a user with web service access. The following assumes this has been done.

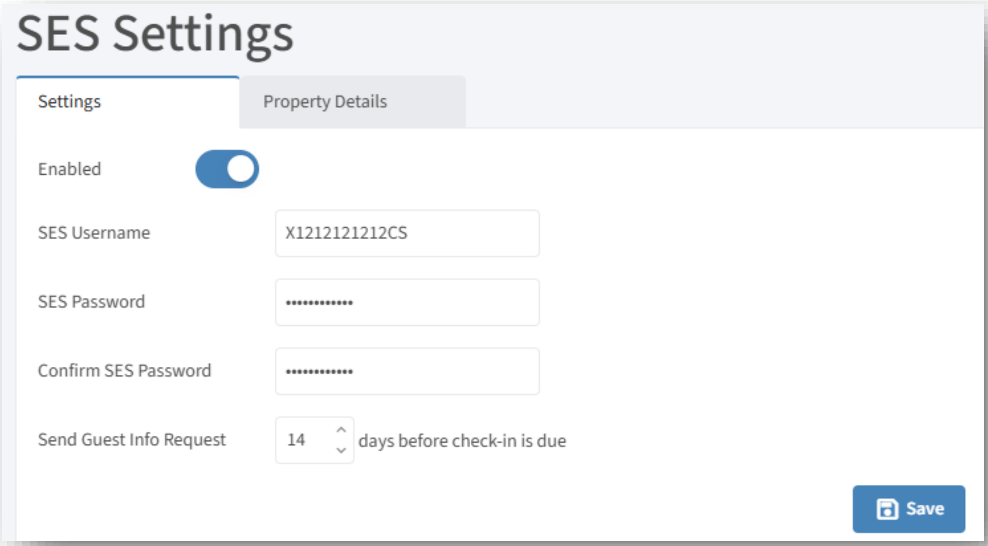
The SES settings screen has two tabs, one for the main settings, the other for the individual property settings.

Settings Tab

This tab contains the information required to connect to the SES system, and contains the following fields:

- Enabled – this allows you to disable the SES integration in its entirety, no messages will be sent to the SES system, and no emails will be sent to guests asking for their details.
- SES username – The username for the SES system
- SES Password – The password for the SES system

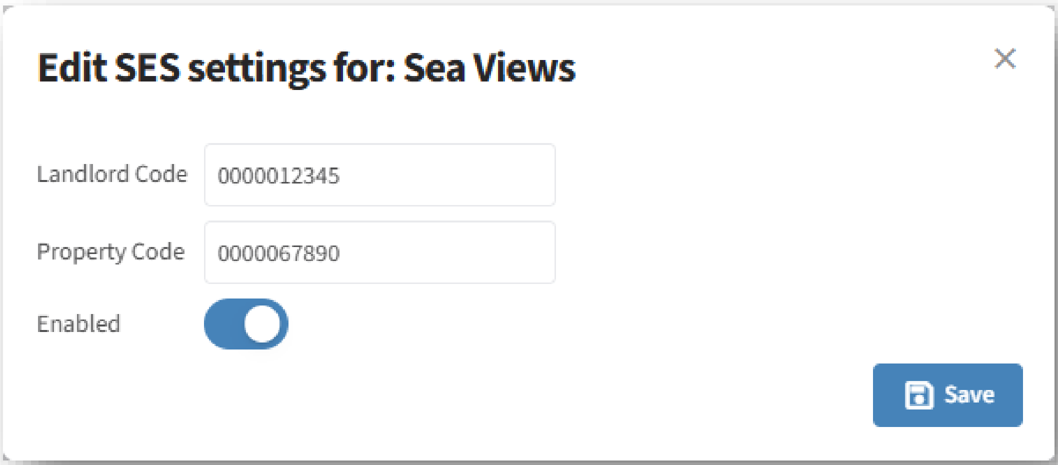
- Send Guest Info – This specifies the number of days before check-in that an email is sent to the lead guest, containing a link for them to enter the details of all guests travelling. The system will also upload details of the booking at this point in time.



Property Details Tab

This tab allows you to configure the Landlord Code and Property Code for each property and include or exclude the property from the upload. The fields are as follows:

- Landlord Code – This is the 10-digit code given by SES when you set up the client as an entity in the SES system.
- Property Code – This is the 10-digit code given by SES when you set up the property in the SES system.
- Enabled – This allows you to include or exclude the property from SES uploads.



Property Rates

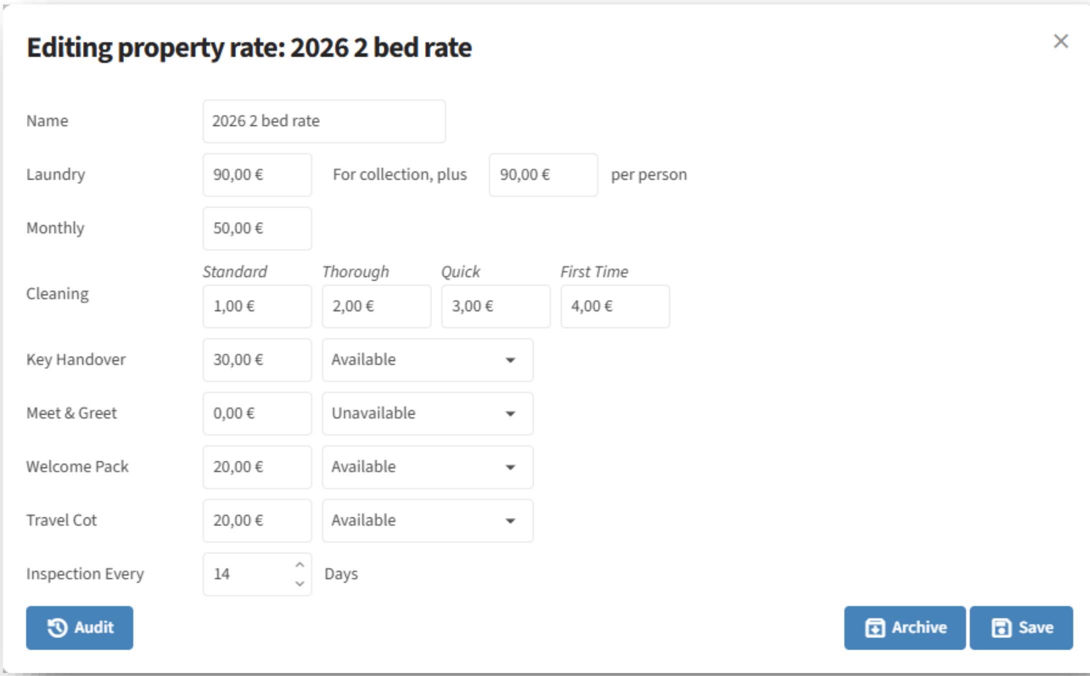
A Property Rate specifies the charges to apply to a client account for the services you apply to their properties. A property is assigned a single property rate, and this can be changed at any time (for example when raising prices at the beginning of the year). It allows a flexible way of applying charging structures without having to remember or duplicating a lot of data.

The property rates screen lists the rates and allows you to add and edit them. Each rate has the following fields:

- Name – The name of the rate
- Laundry fee – Two rates, the first being a collection fee then a rate for each person laundry is carried out for. The system knows this from the booking, but it can be changed if for example the guests use more than expected.
- Monthly – This is the monthly fee, sometimes called the "Property Management Fee". This fee is added to the client's account each month automatically.
- Cleaning – This contains, for each cleaning level, the rate applied for that clean. When a clean is logged in the system you choose the level.

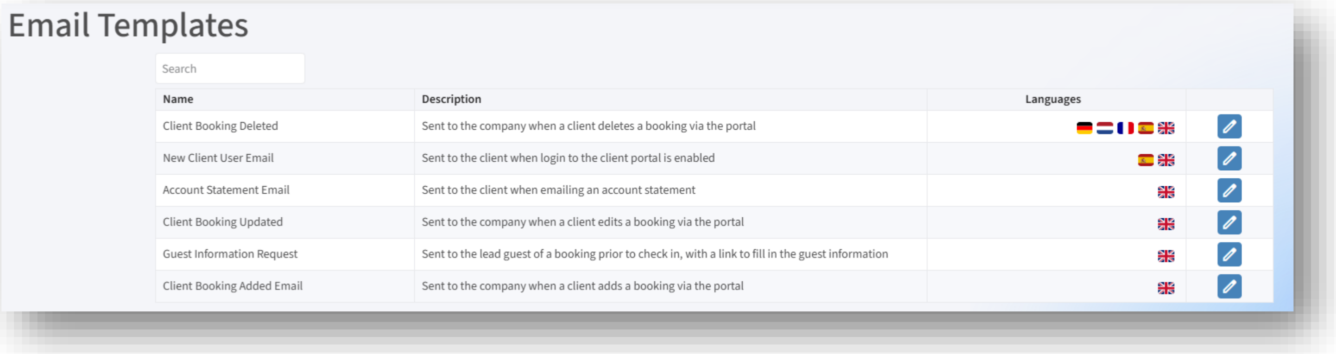
For each of the services below, you can choose to disable this service (if you don't provide it) by choosing "Unavailable" in the drop down. If this is applied by default to all bookings, choose "Automatically apply", otherwise choose "Available".

- Key Handover – This specifies the fee to the client for providing a key collection service (key box etc.). It's a one-off cost where the booking has this specified.
- Meet & Greet – This specifies the fee to the client for providing a meet & greet service. It's a one-off cost where the booking has this specified. Note you can't choose Key Handover and Meet & Greet at the same time.
- Welcome Pack– This specifies the fee to the client for providing a welcome pack. It's a one-off cost where the booking has this specified.
- Travel Cot – This specifies the fee to the client for providing a travel cot. It's a one-off cost where the booking has this specified.
- Inspection Days – This specifies the number of days between inspections of the property.



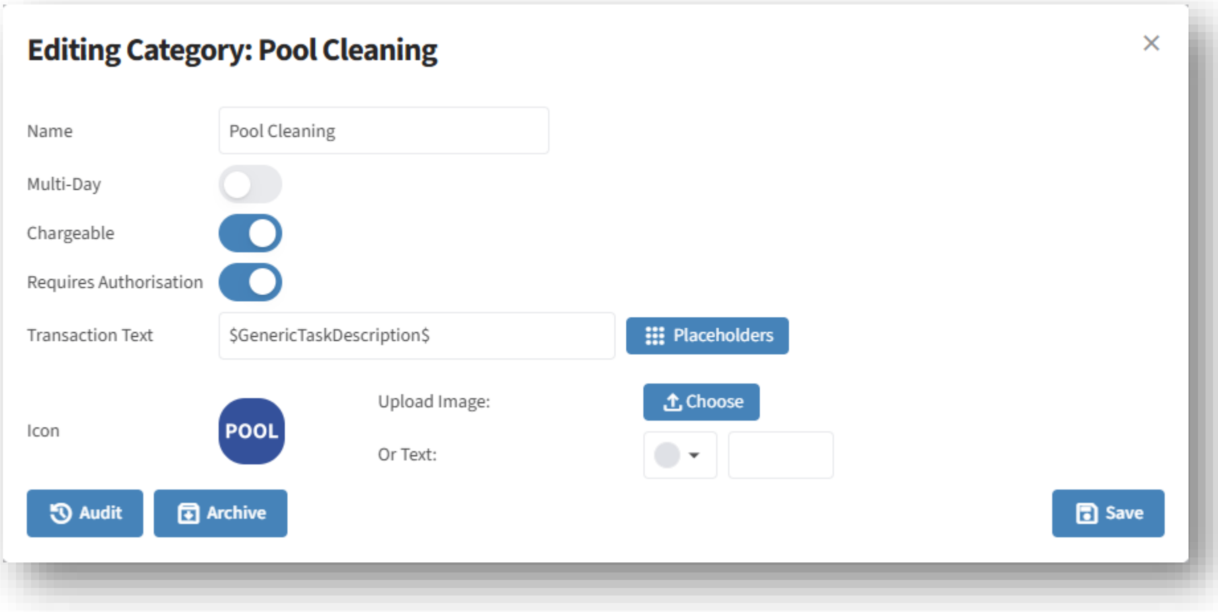
Email Templates

The system has several email templates that are sent from the system because of events that occur. This screen details the templates available and allows you to customise the text for each one, in several languages. The system selects the appropriate language template when sending an email.



Task Categories

When creating a task, you need to assign it a category, which can change the behaviour of that task.



A task can either be for a single day, or can span multiple days, this is changed by the 'multi-Day' option.

If a task is chargeable, the system will prompt for the task to be assigned to a property and a cost to the owner for that task, it will then charge the owner when the task is completed.

Tasks can require the owner to authorise if required, this is simply an authorisation date added to the task. To set this option choose "Requires Authorisation"

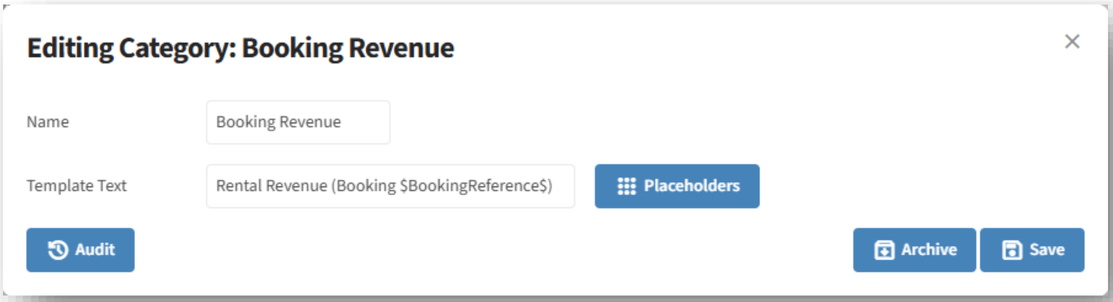
It's possible to change what appears on the owners' statement for a chargeable task by editing the transaction text, this allows placeholders to be used such as the task category, description and other fields.

Transaction Categories

When adding transactions to a client account, each one is tagged with a category, and specifies a type of transaction, either a credit or a debit.

There are several system categories which are used when adding automatic charges such as cleaning, key handover fees etc.

You cannot remove system categories, but you can alter how they appear on the statements by changing the template text field:



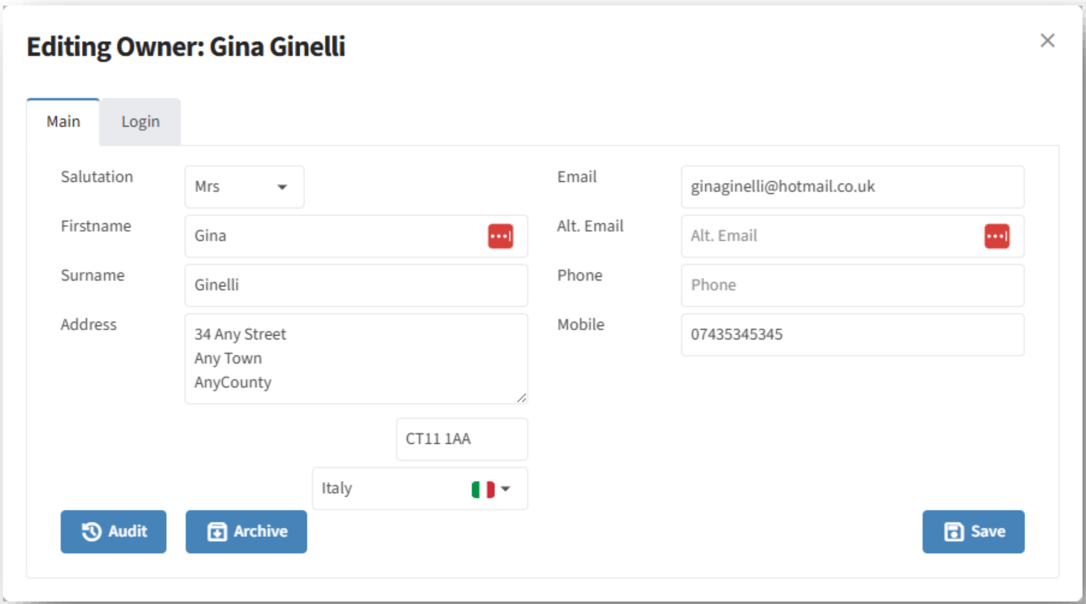
If you wish to add manual transactions (other than client payments) to an account, you need to create a new category for this.

Owners

An owner is someone who owns one or more properties and has an account for each one. The owners screen allows you to add / view /edit owners. The fields required for a new client are self-explanatory.

To allow an owner to log onto the system and access the guest area, access the “Login” tab, enable and set a password. The system will send an email to the owner with their login details. Once they log in, they will be able to carry out the following actions:

- Add / View / Cancel bookings – this will send notifications via email to your company address.
- Block out dates (for example, for their own visits) - this will send notifications via email to your company address.
- View / Download statements
- View occupancy statistics



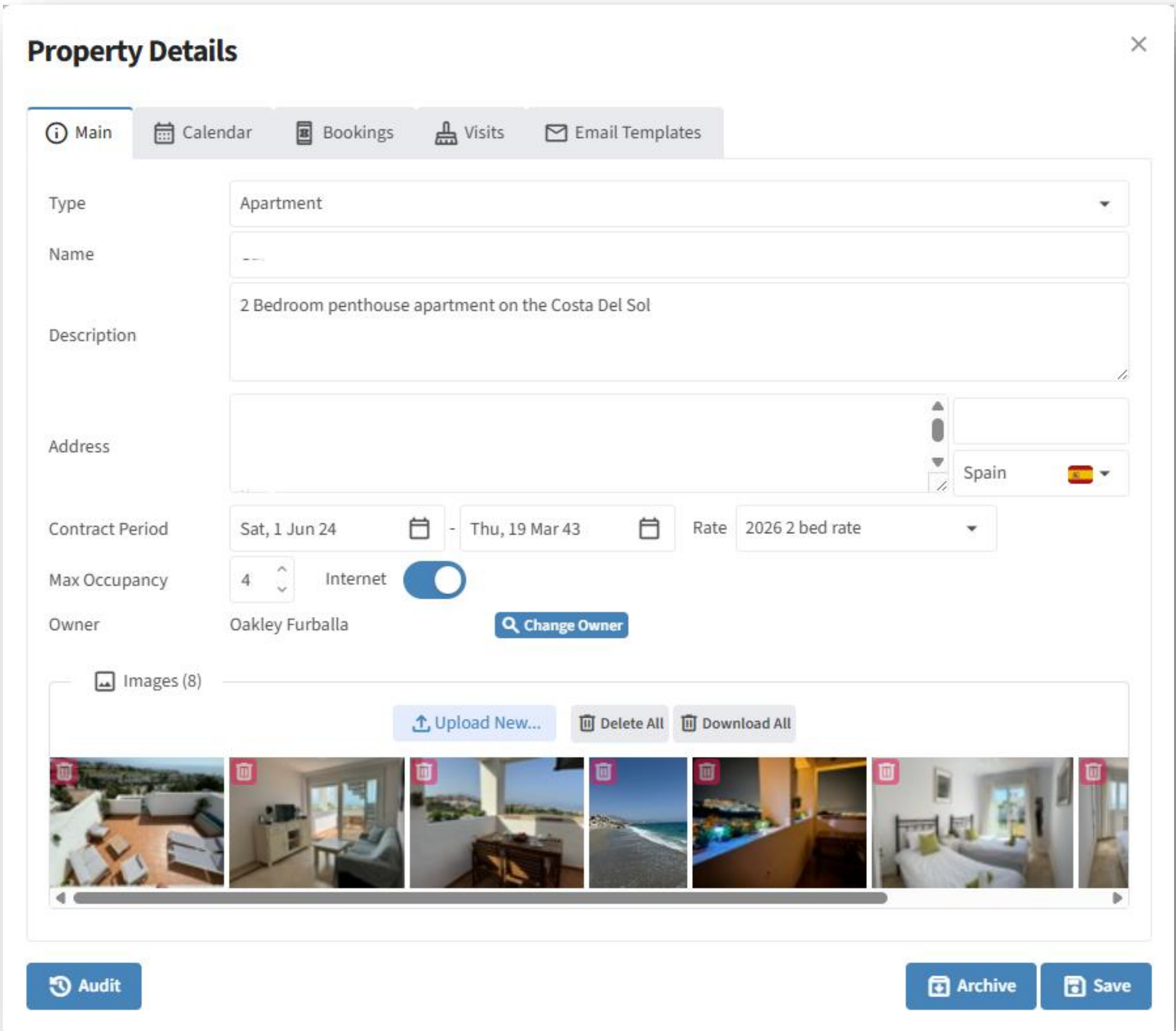
Properties

Each property is set up in the system under the properties screen. This screen contains several tabs:

Main Tab

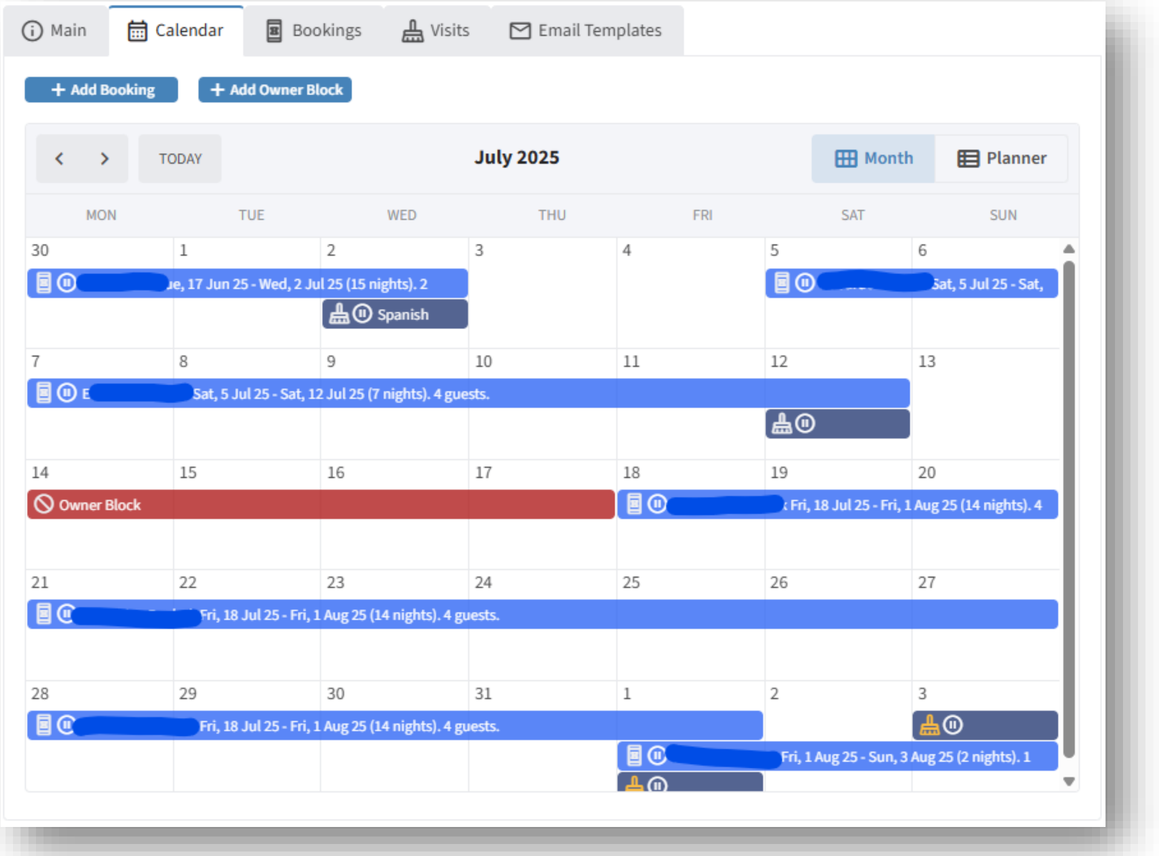
The main details of the property are set up in this tab, the fields being as follows:

- Type – the type of apartment, from a fixed list
- Name – the name of the property
- Description – a description of the property
- Address – the address of the property
- Contract period – details the date range this property is under contract for. You cannot create bookings for a property that is out of contract.
- Rate – the rate to apply to this property, details the fees to the client for various services
- Max occupancy – the maximum number of people the property can accommodate. You cannot overbook a property.
- Internet – specifies if an internet connection is available at this property.
- Owner – the owner of the property. This can be changed over time if required, but each owner will have their own account.
- Images – you can upload images of the property here



Calendar Tab

This tab shows a calendar view for the property.



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Bookings Tab

This tab shows the bookings against the property.

Visits Tab

This tab shows a list of visits (cleaning / inspections) for the property.

Email Templates Tab

This tab shows a list of email templates for the property, such as arrival details. It's possible to alter the templates and set them up in multiple languages.