



# MakeRez On Boarding Guide

Reservations and Relationship Marketing For Vacation Rentals

**A Common Sense Approach**

**10/31/2018**  
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## About MakeRez

**MakeRez** is focused at bringing a set of tools to the vacation rental marketplace. The backbone of MakeRez is a simple to use reservation system that allows your guests to book any time of the day and provides marketing tools to help you keep their "heads in your Beds". But the heart and soul of MakeRez is all about "Relationship Marketing". Building great relationships with your guests to keep them coming back again and again. And through them, reaching out to others in their circle of friends and family.

**Release 2.2 October 2018**

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## About Us

Our journey to the breathtaking mountains of the Carolina's began over a decade ago, and it is a dream come true. It was time to get away from the cold and fast pace of the Mid-West and create our year round Timber Frame home. We live in *RiverDance* full-time and have turned it into an intimate outdoor focused bed and breakfast and have had a wonderful time working with and enjoying our guests.

As we thought about ways to more effectively manage RiverDance, many of the solutions we looked at either were way over priced for a small operation like ours or simply didn't have enough capabilities to make them worthwhile. With almost 40 years in the technology industry and a long background in programming it seemed a natural idea to create a management platform for RiverDance that was easy to use and really made a contribution to keeping us on task with booking more guests. **MakeRez**, was originally conceived just for our private use at RiverDance. But the more we worked with it and used it to help us manage things more effectively we realized that the concept could be valuable for a wide variety of folks in the vacation rental industry. RiverDance has exceeded our wildest dreams and we wouldn't have been able to meet the expectations of our guests without the automation that helped us communicate effectively with them, allowed potential guests to make reservation anytime, anywhere and enabled us to understand where guests were coming from and what motivated them to come to RiverDance.

As MakeRez evolved it became clear that just creating a new reservation system was not enough. The true value was to give us tools to help build outstanding relationships with our guests and through them reach out to others. One example: When I'm on the hunt for something, whether it's looking for a plumber or for a place to stay on our next vacation, I absolutely hate to be ignored. If someone ignores me before they make the sale, how are they going to treat me afterwards? With MakeRez the average time to get back to inquiries with valuable information is less than 5 minutes. A great way to start building a relationship. You can learn a little more about RiverDance at <http://www.riverdancenc.com>.

## Community Guided

One of the central tenets of developing **MakeRez** is to actively gather the ideas of a wide range of folks in the hospitality industry and also folks who are involved in managing other small businesses. As we move forward, we envision an active MakeRez community that takes a central role in guiding its future development. We think there is no better way to ensure that it stays true to its founding principles of making a unique contribution to the hospitality market.

**Disclaimer:** MakeRez is still undergoing development. Part of the rationale for the Beta deployment is to get feedback from folks on what could be added to make it a better solution. As a result, you will occasionally see a stale video or image that has changed a bit. Also since we have been running vacation rentals for almost 15 years, some of the guest we talk about visited us quite a while ago. Thanks ahead of time for your understanding.

**Note:** Also different words are used depending on the type of property to denote a single unit that an individual may rent. It may be a room, suite, apartment, cabin, house,... In this manual when we refer to a room or a unit, we mean the element that pertains to your property.

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## Relationship Marketing



### Don't Just Be Part of the Crowd

Perhaps the most important success factor in most small businesses is the relationships you build with your customers. Small business can thrive when customers come back again and again and even more so when they introduce their family and friends to you. At the same time, small business can suffer greatly when your customers decide to go elsewhere, either because it is more convenient, less expensive or you haven't met their expectations. Even meeting their expectations isn't a guarantee, since those expectations can often be met by many others. So how do you stand out from the crowd of others clamoring for your customers business?

**"Relationship Marketing"** is simply trying to use your most valuable resource, your guests, to help you spread the word. We often say **"if you simply meet a guest's expectations"** then you have lost a golden opportunity. For most folks it is easy to **"Meet Their Expectations"**, whether they are going to a fast food restaurant, the grocery store or choosing where to stay on a trip. The real key is to find a way to **DELIGHT** them so you stand out from the crowd and build the loyalty that is so critical to your success. So you look for the little ways to make their stay special. Sometimes it's the things you provide like offering them a comfy pillow, or providing maps to local attractions. But most often it's in a caring and thoughtful staff who are seriously interested in your guests experience with you both before and after their visit. By setting yourself up as a special place for them, not only are you well on your way to earning their loyalty, but you also have the opportunity to reach through them to others in the circle of friends and family. Even better, by taking that extra step you make it all so much more likely that they will report on their delightful experience by writing a great review.

Sounds like a fine idea, but how do you go about doing it? Most of us don't have people to keep track of and communicate that often with our guests, to find out where they come from, how they found us, and provide business intelligence on how to most effectively reach out to them. For many small businesses one of the biggest challenges is how to effectively market your businesses. What channels should you focus on, which of them is producing best? When is the right time to do your marketing? How can you keep your existing customers and reach through them to gain new ones? The key to doing all this is collecting, organizing and using the information you already have at your fingertips. The **backbone** of MakeRez is a reservation system that offers anytime, anywhere reservations, a wealth of management tools and allows you to manage your business more productively.

But most reservation systems for our business were created in the days where a single computer was installed in your office to enter and keep track of reservations. Even though they have evolved in this age of cloud based, anytime, anywhere computing, the architecture of those systems are often still mired in the past. One of the hallmarks of this new world that your customers have grown to expect are frequent, timely communication about their interests, access to the thoughts and feeling of others who have traveled the same road and the desire to "Pay It Forward" by providing others their thoughts on what worked well, and not so well, with them. This is not just about reservations any more, it is about building relationships (so people come back again and again) and using those relationships to reach out to others.

The **heart and soul** of MakeRez is an email communication system that will allow you to find and build those relationships that are so vital to your success. Let's look at just a couple of ways this could work.

**Handling Inquiries:** You use a variety of advertising services and many of them will send you inquiries from potential guests. Some inquiries have rather complete information while others will provide only a potential guests name and a way to email them. The question is do you see all of them? Do some go into your spam folder? How quickly do you respond? It's a simple rule of thumb that, the quicker you get back to potential guests with interesting information the more likely you are to get a booking. Especially in the vacation rental world where a potential guest may be sending out similar inquires to a host of other properties.

So how does MakeRez help you here? First, a makerez.com based email account is setup that will serve as the initial email destination for all those inquiries. That account, on receiving an email, will immediately forward a copy back to you, so it is also in your inbox and you can handle it in your normal fashion. If that email is an inquiry, it is particularly important that the potential guest hear back as quickly as possible. You may not be able to answer their questions immediately, but you can certainly provide them with compelling information why staying with you is their best choice. That information should be back in your potential guests hand within five minutes of them sending in the original inquiry. That's a timeline that will be hard for others to compete with.

**extendAStay:** We all hate open days on our schedule. One way to fill some of them up is to simply look at which guests have booked that property either immediately before or after the opening. They are automatically sent an **extendAStay** email approximately 10 days before their

arrival asking if they would like to add days their stay. A special offer to entice them to act could also be in order.

So do you want to stand out from the crowd? Dive in and see just how "**Relationship Marketing**" can be part of your answer.



**Use Relationship Management  
To Stand Out from the Crowd**

# On Boarding Guide

## The RiverDance Model

Perhaps the best way to understand how you can customize MakeRez to fit the operation of your business is to first look at how it was setup for RiverDance and then understand how the RiverDance Model is reflected within the MakeRez database.

RiverDance is a small Vacation Rental with two suites, Tree Tops and River Rocks. When explaining RiverDance to our guests we often compare it to an Oreo cookie, with the suites being the top and bottom cookie layers and the middle (filling layer) being the common areas. While we live in and manage RiverDance, we have also had a vacation rental cottage in Southeast Michigan called "Cottage in the Woods".

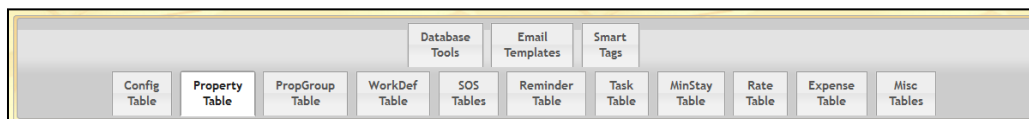
So in the parlance of MakeRez, we have two **property groups**, one called RiverDance that has two cabins (River Rocks and Tree Tops) near Hot Springs NC and the other called Cottage located in Michigan. Within MakeRez the property group is the fundamental marketing object. So all the properties in a property group would;

1. All be managed in the same fashion.
2. Probably all be located in close proximity to each other.
3. Share a single website and advertising used to promote them.
4. Be listed on the same reservation calendar.

Some of the elements that we have to embed into MakeRez;

1. Information about the lodging business that is using MakeRez, how it wants to use MakeRez for that purpose (**config table**).
2. Information on the property group and how it is to be managed (**propGroup table**).
3. Information about the properties and how they are to be managed that comprise the property group (**property table**).
4. Information on the rates that will be charged and how that might vary by day of the week, season, number of people staying or length of stay (**rates table**).
5. Minimum number of days for a reservation and how that might vary by season (**minStay table**).
6. The types of expenses you track (**expenseType table – PREMIUM Tier**).
7. For tracking of marketing programs, how do your customers find you (**sources table**), what causes them to be traveling (**occasions table**) and which of your promotions, if any, are they taking advantage of (**specials table**). These table are pre populated with the sources, occasions and specials we use at RiverDance. You may want to take a quick look at them, but don't have to initially change them unless there are other significant sources, occasions and specials that you would like to track.
8. The type of financial **transactions – PREMIUM Tier** that you track with your customers (credit cards, debit cards, rent, taxes, cleaning,...). This is already pre-populated with what we use at RiverDance and may not have to be changed. Because some of the transaction types are actually woven into the fabric of MakeRez, you can only add transaction types, you can't change the existing ones. (**transType table**).

As we go through each of the tables that need to be customized during your initial setup for MakeRez, you will see data elements from the RiverDance model in the tables to help you understand the purpose of those elements.



All the tables that we will be talking about in the on boarding section are accessed through the tab menu on the Admin Page pictured above.

## The Config Table

The Config Table contains a variety of information that assists **MakeRez** in deciding how to handle inquiries and reservations for your properties. You can customize the config table by going to the Config Tab of the **Admin** page.

Config Table			
<a href="#">Instructions</a> <a href="#">Save Config Info</a>			
Mgr Contact Information			
Company	RiverDance Properties		
Manager First Name	Callie	Manager Last Name	Wellendorf
Manager Email Address		Bcc Email	
Manager Phone Number			
Misc Information			
Inq/Res Switch	Bot	Logging	Y
Allow Deletes	Y	Allow Group Res	N
Maintenance Mode	N	Allow MMS	Y
Future Res (Months)	18	Quick Book Model	3993
Auto Email Information			
Recontact Email (D,D,...)	2,4,6	Thank You Email (Days)	5
Welcome Email (D,D,...)	7,3	ExtendAStay Email (Days)	10
Reminder Email (Months)	6	Inquiry Reminder Email (M,M,...)	2,4,7

## The RiverDance Config Table

### Elements of the Config Table

#### Manager Related

- The name/contact information for the businesses manager. Also the bcc Email address if desired. This will bcc that address on any transactional emails that are cc'd to the businesses manager.
- Bcc Email** - This is a second email address to copy transactional emails to. If it is a valid email address, the bcc is done regardless of what level of manager the email is being cc'd to.



### Misc Information

- **Inq/Res Switch** - Can have values of **Inq** to specify either just inquiries are allowed or **Res** to specify just reservations are allowed. It can also have the value of **Bot** to indicate both inquiries and reservations are allowed through the internet booking widgets.
- **Logging** - When this field is set to Y, **MakeRez** will make a copy of every database request and keep it in a log table for later review. Normally the logging field will be set to N, but if we need some diagnostics to understand how **MakeRez** is operating it may be turned on.
- **Allow Deletes** - Turns on or off the ability to delete a guest on the guest page.
- **Allow Group Res(ervations)** - **Currently disabled.**
- **Maintenance Mode** - Typically used by the MakeRez staff if they are doing some type of maintenance on your site. By default it should be set to N. While maintenance is ongoing, you will not be able to access the site.
- **Allow MMS** - **Currently disabled** but intended to allow not only emails to be sent to guests, but also text messages.
- **Future Res** - This is the number of months in the future you will allow the internet booking engines to make a reservation.
- **Quick Book Model** - Guest id to use in the quick book process. In quick book we duplicate an existing guest, here 3993 and use that as a start for a new booking. This is often used to simply hold a set of dates for a unit and the specifics will be added in later.

### Auto Email Information

- **Recontact Email** - Can either be 0 --> that no recontacts should be done, or be set to a comma separated list of what days to do the recontacts. In the example above three additional recontacts would be done at day 2, 4 and 6.
- **Thank You Email** - Can be 0 --> no automatic Thank You emails should be sent, or to a positive number of days after the guest leaves the Thank You email should be sent.
- **Welcome Email** - - Can be 0 --> no automatic Welcome emails should be sent, or be set to a comma separated list of when to send out the welcomes. In the example above two welcome emails would be sent 7 and 3 days before the guest arrives.
- **Extend A Stay Email** - - Can be 0 --> no automatic extendAStay emails should be sent, or to a positive number of days before the guest arrives the extendAStay should be sent.
- **Reminder Email** - - Can be 0 --> no automatic Reminder emails should be sent, or to a positive number that is the number of months after the guest leaves the Reminder email should be sent.
- **Inquiry Reminder Email** - Can either be 0 --> that no inquiry reminders should be sent, or be set to a comma separated list of what months to do them. In the example above inquiry reminders would be done 2 months, 5 months and 7 months after the guest leaves.

After making changes to the config table you must select the "**Save Config Info**" button to permanently save it to the database. You can also select the "**Instructions**" button to to get some online help in working with the config table.

## The Property Group Table

The Property Group table is an area of your database that details information about the Property Group you are managing. A Property Group is a single group of properties (like the cabins at our farm).

<a href="#">Add a Property Group</a> <a href="#">Delete this Property Group</a> <a href="#">Update this Property Group</a>			
<b>Property Group Information</b>			
Id	-1	Sort	1
Name	RiverDance	Do Email ? (Y/N)	Y
Property Group Zip	28743	Property Group Assoc Info	rd:madisoncountync
<b>Owner Contact Information</b>			
Owner Name	Dave and Callie	Owner Street	
Owner City,State Zip			
<b>Mgr Contact Information</b>			
Mgr Name	Callie Wellendorf	Mgr Phone	
Mgr Email		Bcc Email	
<b>Deposit Information</b>			
Min Dep %	50.00	Min Dep night(s)	1
Dep Cutoff night(s)	7	Dep Method	Guest will provide CC
Dep Login	2BMa6cFw259f	Dep Key	7zL948nK6hYv834K
<b>Payment Information</b>			
First Discount nights,%	5,0.00	Second Discount nights,%	20,0.0
1 Night Surcharge \$	0.00	Commission %	0.00
Xtra Person Surcharge \$	25.00	Last Payment Due Days	14
<b>Email Tags</b>			
Website Link	http://www.riverd	Reviews Link	http://bit.ly/1fda
Availability Link	http://www.riverd	Image Url	http://www.make
<b>Email Tag Editing</b> Welcome   Marketing   TagLine Header   Footer 2000 characters max <div style="border: 1px solid black; height: 100px; width: 100%;"></div> <div>Characters left: 2000</div> <div>Save</div>			

## The RiverDance Property Group Table Entry

Types of information kept in the Property Group table are the name of the property group itself, Owner and manager demographic info (may be the same), information about how to calculate guest deposits, payment surcharge and discount information in addition to the commission rate (if appropriate paid to manage the property). Within the property group are the definitions of a number of email tags that will replace things like the string [[WELCOME]] in email prototypes when they are sent to your guests.



If you hover the mouse over any of the labels in the display, a short description of what that field is will be displayed. This is true with many of the other tables managed by the Admin page.

## Elements of the Property Group Table

### Property Group Information

- **Id** - Used by MakeRez to access the property group record. You do not set this.
- **Sort** - What order you want the property groups displayed in, 1 is first.
- **Name** - The name of the property group, in this example RiverDance.
- **Property Group Zip** – Zip code for the property group. Used to get weather information that is sent to guests.
- **Do Email** – Whether this property group should be able to send custom emails out through the search page.
- **Property Group Assoc Info** – If this property group is linked to an association website and any changes in the calendar needs to be forwarded. More information is in an appendix. Blank if no association.

### Owner Contact Information

- The **name and mailing address** for the property groups owner.

### Mgr Contact Information

- The **name and contact information** for the property groups manager. Also t
- **Bcc Email address** if desired. This will bcc that address on any transactional emails that are cc'd to the property group manager. If this is blank, transactional emails will only be sent to the email listed in the config table responsible for all the properties.

### Deposit Information

- **Min Dep %** - Minimum percent of the rental fee used to calculated the deposit. For example if this is set to 50, then the minimum deposit taken is equal to 50 % of the total rental charge.
- **Min Dep night(s)** - Minimum number of nights rental to charge as a deposit. For example if this number is set to 1, then the minimum deposit taken will be equal to one nights rental. The actual deposit amount will be the maximum of the two deposits calculated using these two values.
- **Dep Cutoff night(s)** - If the arrival date for the reservation is sooner than this number, take the whole rental amount as deposit. For example if this number is set to 7 and the reservation is taken less than 7 days before the guest arrives, the entire rental amount should be taken as a deposit. If this field is set to 0, then the deposit that is determined by **Min Dep %** and **Min Dep night(s)** will be used.
- **Dep Method** -In the Property Group Table you determine how you want to handle getting the deposits paid. The **Dep Method** field directs **MakeRez**, when a potential guest is making a reservation through your website, how to handle taking deposits. **Dep Method** has the following four values:

- **noCcCust** - Used when no credit card is required for the reservation, but the customer will be asked to call with the credit card information for the deposit. If **Dep Method** is set to this value, **makeRez** will tell the customer that they need to contact the property to arrange the deposit.
- **noCcOwn** - Used when no credit card is required for the reservation, but the property will contact the customer to obtain credit card information for the deposit.
- **NoDep** - Used when no deposit is required.
- **aNet** – **This value is not currently supported.** Used when a deposit actually needs to be done to make the reservation. Here **authorize.net** is used to validate a credit card during the online reservation process and to initiate transferring the deposit into the properties bank account. As part of this process there is a authorize.net login and transaction key that are needed to process the credit card transaction. Those fields are entered into the Property Group Table in the **Dep Login** and **Dep Key** fields.
- **Dep Login and Key** - See **aNet** discussion above.

### Payment Information

- **First Discount, nights, %** - If you offer a discount for stays of a certain length (say a week), this is the number of nights needed to get the discount. And what the discount percentage is. Since we don't give discounts at RiverDance based on the length of stay that discount is 0.
- **Second Discount, nights, %** -- If you offer a discount for stays of a certain length and there is a second breakpoint (say a month) this field is used.
- **1 night Surcharge \$** - Amount added onto the standard rental rate if the guests are only staying for one night.
- **Commission %** - The percentage of rental income paid out to the property manager for commission.
- **Xtra Person Surcharge \$** - Amount added for each rental night if more that two adults are in the rental party.
- **Last Payment Due Days** – Number of days before the guests arrival the last payment is due. Set to 0, if the entire payment is taken up front or the final part of the payment will be taken after the guests arrive. Using this setting will cause an alert to happen when the dashboard page is displayed to indicate that it is time to collect additional money from guests.

### Email Tags

- **Website Link** - The absolute url for the property group website, <http://www.riverdancenc.com>
- **Reviews Link** -- The absolute url for the reviews, <http://www.riverdancenc.com/reviews>
- **Availability Link** - The absolute url for the availability page on the property group website, <http://www.riverdancenc.com/availability>
- **Image Url** - The absolute url for image to be used in the outgoing email messages, <http://www.makerez.com/sites/riverdancenc/emailTemplates/images/RiverDance.jpg>



- **Welcome Tag** - Welcome information for folks coming to visit you.
- **Marketing Tag** - Marketing information for folks coming to visit you. Included in various emails.
- **TagLine Tag** - Information to be used as an email signature in all emails.
- **Header Tag** - Information to be put at the top of all emails.
- **Footer Tag** - Information to be put at the bottom of all emails.

**To Add a New Property Group** - Select a property group to use as a template by clicking in its row. Make the desired changes and finally select **Add a Property Group** .

**To Edit an Existing Property Group** - Select the property group you would like to change by clicking in its row. Make the desired changes and finally select **Update this Property Group** .

**To Save Changes Made to the Property Group** - If you have added a new property group or edited existing ones, make sure you select **Save Property Group** to permanently save your changes to the server.

## The Property Table

The **property table** is an area of your database that details what properties and units you are offering for rent. Although you can certainly specify a single unit is a property unto itself, grouping them allows **MakeRez** to report and manage them more intelligently (i.e. look at the revenue generated by the whole Property Group itself, or have a minimum stay table apply to the entire Property Group). It also allows **MakeRez** to allow access to just one Property Group calendar for inclusion into the property website. The Property tab of the **Admin** page is where properties, groups and units can be added, deleted and edited.

<input type="button" value="Add a Property"/> <input type="button" value="Delete this Property"/> <input type="button" value="Update this Property"/>			
<b>Property Information</b>			
Id	-1	Sort	10
Prop Group Name	RiverDance	Prop Unit	Tree Tops
Prop Code	tt	Prop Class	Cabin
<b>Mgr Contact Information</b>			
Mgr Name	Callie Wellendorf	Mgr Phone	
Mgr Email		Bcc Email	
<b>Tax Information</b>			
State Tax %	6.75	County Tax %	0.00
Tax Clean ?	Y		
<b>Misc Information</b>			
Kids ?	Y	Pets ?	Y
Hide ?	N	Max Occ.	6
Cleaning	60.00		
<b>Marketing Description</b>			
2000 characters max			
<div style="border: 1px solid #ccc; padding: 5px;"> <p>Welcome to the Tree Tops Cabin. There you will find both spacious bedrooms, a full bath and a sitting area with a comfy leather couch and TV/DVD combo. The bookcase in the sitting room is stocked with good books to read and a selection of DVD's to enjoy. It also has a small microwave and refrigerator for your enjoyment.</p> <p>The Beech bedroom overlooks the amazing view of the Big Laurel with the Pisgah National Forest behind. Beech has a romantic queen sized sleigh bed where you can snuggle up under a comfy duvet and enjoy a well deserved rest. If your small ones are along for the trip Beech has a full futon waiting for them.</p> <p>The Hickory bedroom has two twin beds which can be converted to a King.</p> </div>			
Characters left: 1208			
<input type="button" value="Save"/>			

## The Tree Tops Property Table Entry

The property table allows you to specify on a property by property basis whether you will allow pets or children in specific properties.



The property table also has a "**Hide**" field. If a property/unit is set to hidden it will not be displayed in the website calendar widget which means potential guests will not see it. It will be displayed on the subscribers view of the calendar. Hidden property/units are also not included in some the **MakeRez** marketing and operation reports, like the occupancy report. Hidden units are typically used for those units that are infrequently rented and only to guests that meet specific criteria. As such, they should not appear in the guests calendar view.

#### Property Information

- **Id** - A system generated key to help search this table. You do not set this.
- **Sort** - What order do you want the properties displayed in, 1 is first.
- **Prop Group Name** - The name of the property group. (**RiverDance**)
- **Prop Unit** - The name of this unit (**Tree Tops**)
- **Prop Code** - A two letter code identifying this unit (**tt**)
- **Prop Class** - Class of this unit (**Cabin**)

#### Mgr Contact Information

- **Mgr Name** - The name, phone #, email address for the properties manager. If the email address is blank, MakeRez goes up to the property group entry for the managers info. Also the bcc Email address if desired. This will bcc that address on any transactional emails that are cc'd to the property manager.

#### Tax Information

- **State Tax %** - State tax rate to use (**6.75**)
- **County Tax %** - County tax rate to use. (**0.00**)
- **Tax Cleaning** - Do we tax cleaning ? (**Y**)

#### Misc Information

- **Kids** - Does this unit allow kids ? (**Y**) At RiverDance we do allow children
- **Pets** - Does this unit allow pets ? (**Y**)
- **Hide** - Hide this unit in the booking widget? (**N**) If it was Y, this unit would only visible to the owner, not to guests.
- **max Occ.** - Maximum number of people in this unit (**8**)
- **Cleaning** - The cleaning charge for this unit (**60.00**)

#### Marketing Description

The marketing description is limited to 1000 characters and should present a attractive description for the Tree Tops Suite. It is displayed along with a image and other important information for the suite when the user requests that information.

**To Add a New Property** - Select a property to use as a template by clicking in its row. Make the desired changes and finally select **Add a Property** .

**To Edit an Existing Property** - Select the property you would like to change by clicking in its row. Make the desired changes and finally select **Update this Property**.

**To Save Changes Made to the Property** - If you have added a new property or edited existing ones, make sure you select **Save Property** to permanently save your changes to the server.



## The Rate Table

The rate table provides flexibility in setting the rates for your property. Rates can vary by season (Winter, Spring, Summer, Xmas) as in the example below, in addition to varying by the day of the week. Rates can also be subject to (if appropriate) a one night surcharge, a surcharge for 3-4, or 5-6 adults in a unit, or a length of stay discount. Rates are also associated with a property class (like Jr Suite) that is kept in the property table for each unit. Let's look at how **MakeRez** would determine what rates to use for a two person, two night stay starting on July 4<sup>th</sup>, 2015 in a unit classified as a Jr Suite. First it would find the part of the rate table that deals with the "Jr Suite" rate class. In this case that is started by the rate table header with Index = 1. Next it would isolate the particular season (or seasons if the stay spanned multiple seasons) corresponding to July 4<sup>th</sup> and 5<sup>th</sup> 2015 which would be the rate entry with Index of 14 and the season called "**Prime 2015**". Since for that rate entry has no day of week variation the base rental rate for two people for those two days are \$115 + \$115 = \$230.

Rates can also be modified by looking at the number of adults that are staying and the number of nights that they are staying. These parameters are all associated with the property group and can be found in its description.

This table has two types of records. The header entries designates the rate classes (Suite, Jr Suite) that the next set of rates (the rate group) are for. Up to six rate classes can be defined in one rate header. If two rate classes have different rate seasons or rates themselves, they must be separated and each have their own rate group and rate header. The first entry in the header is a default rate for the rate classes if no subsequent rate season covers the reservation. The rate group details the rate seasons that are tied to that rate header. So in this case the rate seasons with Index of 3,12,13,4,14,17 make up the rate group. Rate seasons have an id, name, sort order, start and an end date, along with the rate specification on a per day basis through the week. The SortOrder is used to tie the rate seasons in the rate group to the rate header. When the whole table is sorted, the rate seasons in a rate group sit underneath their rate header.

Index	SortOrder	Season	Start Date	End Date	Mo	Tu	We	Th	Fr	Sa	Su
1	5	Rate Class	0000-00-00	0000-00-00	115	Jr Suite	Suite				
3	10	Winter 2014	2014-01-01	2014-02-27	115	115	115	115	135	135	115
12	12	Prime 2014	2014-03-01	2014-11-30	150	150	150	150	175	175	150
13	14	XMas 2014	2014-12-01	2014-12-31	150	150	175	175	175	175	150
4	16	Winter 2015	2015-01-01	2015-02-27	115	115	115	115	115	115	115
14	18	Prime 2015	2015-03-01	2015-11-30	115	115	115	115	115	115	115
17	20	Xmas 2015	2015-12-01	2015-12-31	115	115	115	115	115	115	115
10	100	Rate Class	0000-00-00	0000-00-00	200	Cabin					

## RiverDance Rates Table

**To Add a New rate** - Select a rate to use as a template by clicking in its row. Make the desired changes and finally select **Add a Rate**.

**To Edit an Existing Rate** - Select the rate you would like to change by clicking in its row. Make the desired changes and finally select **Update this Rate**.

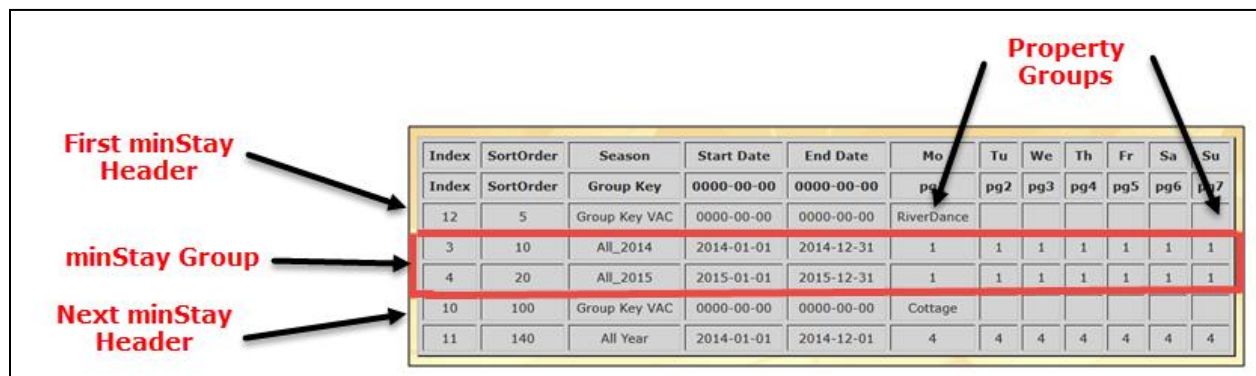
**To Save Changes Made to the Rate** - If you have added a new rate or edited existing ones, make sure you select **Save Rates** to permanently save your changes to the server.

## Minimum Stay Criteria Table

When a guest (using one of the Calendar widgets) makes a reservation, **MakeRez** will validate it against the minimum stay table in the database. That table can contain a variety of date ranges, each with their own minimum stay criteria that can be tied to the arriving day of the week. In the table below the first minStay header is solely for the RiverDance property group. If other property groups you manage also could use this minStay layout, they could also be listed on the minStay header entry. The minStay group associated with that header has one entry for all of 2014 and a second entry for all of 2015. For RiverDance we don't enforce minStay criteria, so all the entries for Mo, Tu,... Su are 1 which indicates a single night stay is fine. If a Property Group is not associated with a minStay header, then it does not have a minimum stay criteria associated with it. In that case any length of stay for that Property Group is OK. Also, if the arrival date specified for a stay does not fall into a date range, then any length of stay is OK. The SortOrder is used to tie the minStay seasons in the minStay group to the minStay header. When the whole table is sorted, the minStay seasons in a minStay group sit underneath their minStay header.

If you have other property groups that need their own minStay criteria, you can add addition minStay header, minStay group sets.

With the structure of the minStay table you can different minimum stay criteria for different days of the week, say a weekend needs to have a two day minimum stay where a single night stay on Su-Th would be OK. Also the minStay group can have multiple entries corresponding to different seasons so you could have one set of minimum stay criteria for your prime time or at holiday and another for non prime time.



The diagram shows a table structure with the following components:

- First minStay Header:** Points to the first row of the table (Index 12).
- minStay Group:** Points to the rows immediately following the header (Index 3 and 4).
- Next minStay Header:** Points to the row after the first group (Index 10).
- Property Groups:** Points to the columns labeled Mo, Tu, We, Th, Fr, Sa, Su.

Index	SortOrder	Season	Start Date	End Date	Mo	Tu	We	Th	Fr	Sa	Su
12	5	Group Key VAC	0000-00-00	0000-00-00	pg1	pg2	pg3	pg4	pg5	pg6	pg7
3	10	All_2014	2014-01-01	2014-12-31	1	1	1	1	1	1	1
4	20	All_2015	2015-01-01	2015-12-31	1	1	1	1	1	1	1
10	100	Group Key VAC	0000-00-00	0000-00-00	Cottage						
11	140	All Year	2014-01-01	2014-12-01	4	4	4	4	4	4	4

### RiverDance minStay Table

If their stay does not meet the minimum stay criteria, potential guests are not told the reason, but are asked to call the reservation phone #. Then you can potentially get them to stay longer or make an exception. If the reservation is made by the subscriber within MakeRez no minimum stay criteria is used.

**To Add a New minStay** - Select a minStay to use as a template by clicking in its row. Make the desired changes and finally select **Add a minStay**.

**To Edit an Existing minStay** - Select the minStay you would like to change by clicking in its row. Make the desired changes and finally select **Update this minStay**.

**To Save Changes Made to the minStay** - If you have added a new minStay or edited existing ones, make sure you select **Save minStay** to permanently save your changes to the server.

## Sources Table

Sources are information about how inquiries/guests are finding your property. So where do those inquiries/guests originate from? Typical sources are things like a Google search, bedandbreakfast.com, FlipKey, HomeAway, ... or referrals from happy guests (the best source of all !). Sources can help you understand where to focus some of your marketing dollars and also can help you track how successful those campaigns are.

With MakeRez there is a table in your database that should contain the sources of inquiries/guests that you consider to be important for your property. When your initial database is setup, MakeRez will pre-populate a number of these sources so you don't have to and you can see how Sources are handled and used in **MakeRez**.

Index	Active	Sort Order	Name
1	Y	0	None
2	Y	10	return
3	Y	20	referral
4	Y	30	tripadvisor
5	Y	40	Google
6	Y	50	Internet

### The RiverDance Sources Table

When you are entering information in for a particular guest, one of the items you can enter is the source of that inquiry/guest. There is a drop down selection box that will list your sources that are currently "active" and you should select the appropriate one. Only "active" sources are presented in the drop down selection box, so if some of the sources are no longer valid, you can simply mark them as "inactive" using the Admin page. There are four fields you need to enter for a new source or change if you want to edit an existing source.

- **Id** - Used to access the source record. You do not set this.
- **Active** - Whether this source should be displayed for new guests.
- **Sort Order** - Dictates what order the sources are actually displayed in the drop down selection box.
- **Name** - Identifying the Source itself.

**To Add a New Source** - Select a source to use as a template by clicking in its row. Make the desired changes and finally select **Add a Source**.

**To Edit an Existing Source** - Select the source you would like to change by clicking in its row. Make the desired changes and finally select **Update this Source**. You cannot delete a source, since there may be guests in the database that you have tagged with coming from that source. If you no longer want a source to appear in the drop down lists within MakeRez, simply mark it as inactive and save your changes.

**To Save Changes Made to the Source Table**- If you have added a new source or edited existing ones, make sure you select **Save Source** to permanently save your changes to the server.

You can use the Report page and go to the Sources/Occasions/Special tab and look at a report that details (for a given time frame) the number of guests that identified that Source as how they found your property. Finally you can use the Search page to look for guests that have a specific source (like HomeAway) included in your guest record.

## Occasions Table

Occasions are information why guests might be coming to your property. Are they coming for a Family Vacation or reunion?, a Wedding or an Anniversary? or a variety of occasions that might even be specific to your property like Hiking, Rafting,... Occasions can help you understand part of the reasons why guests come to visit and can provide information on how to focus some of your marketing dollars. If Family Reunions are popular, perhaps you can directly market to that type of potential guest.

With **MakeRez** there is a table in your database that should contain the Occasions that describe the inquiries/guests that you consider to be important for your property. When your initial database is setup, **MakeRez** will pre-populate a number of these Occasions so you don't have to and you can see how Occasions are handled and used in **MakeRez**.

Index	Active	Sort Order	Name
1	Y	0	None
6	Y	10	Birthday
4	Y	20	Anniversary
3	Y	30	Honeymoon
8	Y	40	Holiday
2	Y	50	Wedding

### The RiverDance Occasions Table

When you are entering information in for a particular guest, one of the items you can enter is the occasion that brings the guest to you. There is a drop down selection box that will list your occasions that are currently "active" and you should select the appropriate one. Only "active" occasions are presented in the drop down selection box, so if some of the occasions are no longer valid, you can simply mark them as "inactive" using the Admin page. There are four fields you need to enter for a new source or change if you want to edit an existing source.

- **Id** - Used to access the occasion record. You do not set this.
- **Active** - Whether this occasion should be displayed for new guests.
- **Sort Order** - Dictates what order the occasions are actually displayed in the drop down selection box.
- **Name** - Identifying the Occasion itself.

**To Add a New Occasion** - Select a occasion to use as a template by clicking in its row. Make the desired changes and finally select **Add a Occasion** .

**To Edit an Existing Occasion** - Select the occasion you would like to change by clicking in its row. Make the desired changes and finally select **Update this Occasion**. You cannot delete a occasion, since there may be guests in the database that you have tagged with coming because of that occasion. If you no longer want a occasion to appear in the drop down lists within MakeRez, simply mark it as inactive and save your changes.

**To Save Changes Made to the Occasion Table** - If you have added a new occasion or edited existing ones, make sure you select **Save Occasions** to permanently save your changes to the server.

You can use the **Report** page and go to the Sources/Occasions/Special tab and look at a report that details (for a given time frame) the number of guests that listed that type of **Occasion** as part of their reason for coming to your property. Finally you can use the Search page to look for guests that have a specific occasion (like a wedding) included in your guest record.

## Specials Table

Specials are promotions you run or local activities that help bring guests to your property. Are they coming because of a **"Guided Trout Fishing"** special or perhaps a **"mid week Winter Getaway"** special? Specials can help you understand part of the reasons why guests come to visit and can provide information on which specials are making a difference in your marketing efforts and which ones perhaps are not? Hopefully understanding the impact of your specials on your marketing efforts can help you understand even better how to appeal to your potential guests and perhaps create additional specials that will resonate well.

With **MakeRez** there is a table in your database that describes the specials that you have used. When your initial database is setup, **MakeRez** will pre-populate a number of these Specials. Since specials tend to be very particular to a specific property we have originally put a sample of specials so you can see how they are handled and used in **MakeRez**.

Index	Active	Sort Order	Name
1	Y	0	None
2	Y	10	Off Season
3	Y	20	Outdoor
5	Y	30	Gourmet

## The RiverDance Specials Table

When you are entering information in for a particular guest, one of the items you can enter is if there is a special tied to that inquiry/guest. There is a drop down selection box that will list your Specials that are currently "active" and you should select the appropriate one. Only "active" Specials are presented in the drop down selection box, so if some of the Specials are no longer valid, you can simply mark them as "inactive" using the **Admin** page. There are three fields you need to enter for a new occasion or change if you want to edit an existing source.

- **Id** - Used to access the occasion record. You do not set this
- **Active** - Whether this occasion should be displayed for new guests.
- **Sort Order** - Dictates what order the occasions are actually displayed in the drop down selection box.
- **Name** - Identifying the Occasion itself.

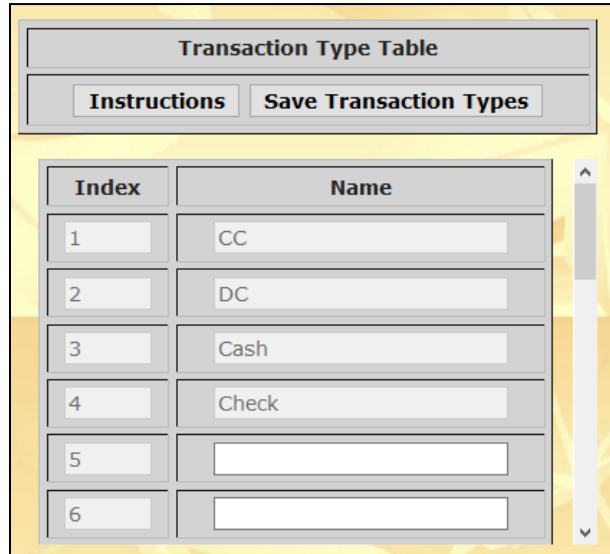
**To Add a New Special** - Select a special to use as a template by clicking in its row. Make the desired changes and finally select **Add a Special**.

**To Edit an Existing Special** - Select the special you would like to change by clicking in its row. Make the desired changes and finally select **Update this Special**. You cannot delete a special, since there may be guests in the database that you have tagged with coming from that special. If you no longer want a special to appear in the drop down lists within MakeRez, simply mark it as inactive and save your changes.

**To Save Changes Made to the Special** - If you have added a new special or edited existing ones, make sure you select **Save Special** to permanently save your changes to the server.

You can use the **Report** page and go to the Sources/Occasions/Special tab and look at a report that details (for a given time frame) the number of guests that listed that type of **Special** as part of their reason for coming to your property. Finally you can use the Search page to look for guests that have a special (like a holiday package) included in your guest record. The Misc Table

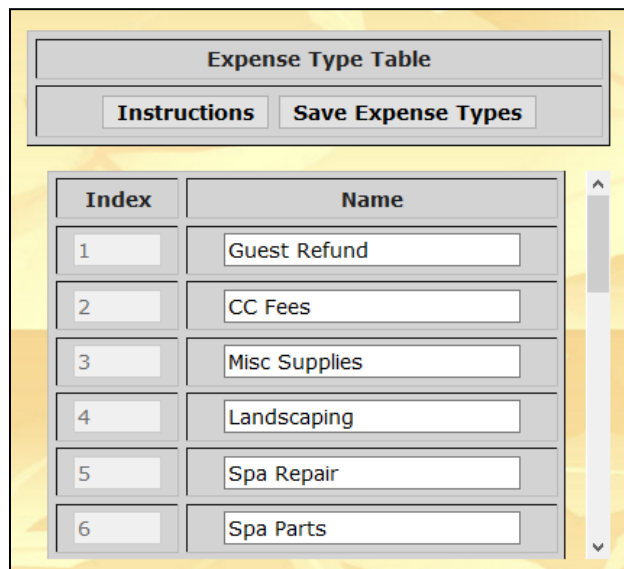
## Set It And Forget It Tables



The Transaction Type Table interface features a title bar 'Transaction Type Table' and two buttons: 'Instructions' and 'Save Transaction Types'. Below is a table with two columns: 'Index' and 'Name'. The first four rows are pre-filled with 'CC', 'DC', 'Cash', and 'Check'. The last two rows (indices 5 and 6) have empty text boxes for custom entry. A vertical scrollbar is on the right.

Index	Name
1	CC
2	DC
3	Cash
4	Check
5	
6	

1. The **Transaction Type** table serves to categorize customer transactions in the Transaction Tab on the Guest page. Several of both the purchase and payment transaction types are fixed and are grayed out as a result, but you are free to add additional custom types of your own. There is a maximum of twenty Transaction Types.



The Expense Type Table interface features a title bar 'Expense Type Table' and two buttons: 'Instructions' and 'Save Expense Types'. Below is a table with two columns: 'Index' and 'Name'. The first six rows are pre-filled with 'Guest Refund', 'CC Fees', 'Misc Supplies', 'Landscaping', 'Spa Repair', and 'Spa Parts'. The last two rows (indices 5 and 6) have empty text boxes for custom entry. A vertical scrollbar is on the right.

Index	Name
1	Guest Refund
2	CC Fees
3	Misc Supplies
4	Landscaping
5	Spa Repair
6	Spa Parts

2. The **Expense Types** table serves to categorize the expenses handled by the expense Tab on the Admin table. There is a maximum of twenty Expense Types. None of the expense types are pre-set so you are free to customize them to match your business. The **Expense** table itself is discussed more in Section X of the manual. The expense table helps to track expenses on a monthly basis and provides that information for the Management Report discussed in Section Y of the manual that presents a picture of your monthly expenses and revenues.

Property Translation Table

Instructions
Save Property Translations

Index	Sort Order	Service	Number	PropGroup
1	10	HomeAway	225111	RiverDance
2	20	FlipKey	212065	RiverDance
3	30			

3. Finally the **Property Translation** table which is currently not used.

## Finishing the Onboarding Process

The last two sets of information needed to finish the onboarding process are to load in the past, present and current reservation and inquiries (phase 1) and to set up the email prototype information that is used for your transaction emails and custom email campaigns through MakeRez (phase 2). All are done from inside the Admin Page.

Below are the columns in the spreadsheet file and examples of the data that goes into the columns. The guestId is also part of the database record created for a guest, but it is calculated on the fly, so it should not be included in the spreadsheet. Both the notes and actions the field should be blank.

Field Names	Example
* <u>initialContact</u>	2016-03-01
* <u>guestName</u>	Dave Wellendorf
* <u>email</u>	
* <u>street</u>	
* <u>city</u>	Marshall
* <u>state</u>	NC
* <u>zip</u>	28753
* <u>cellNum</u>	
<u>cellCarrier</u>	Currently not used
<u>altNum</u>	
<u>ccFee</u>	Optional
* <u>source</u>	1
* <u>numAdults</u>	2
* <u>numKids</u>	0
<u>booked</u>	Y
<u>deposit</u>	200.00
* <u>arrivalDate</u>	2016-05-11
* <u># nights</u>	4
* <u>property</u>	rr
* <u>totalRent</u>	400.00
* <u>cleaning</u>	40.00
* <u>extra</u>	0.00
* <u>occasion</u>	0
* <u>special</u>	0
<u>notes</u>	
<u>actions</u>	

### **guest.csv table layout (\*= required for a reservation)**



By default excel will try to format dates in a mm/dd/yyyy format which does not match the yyyy-mm-dd format required by the database that **MakeRez** uses. During the data import procedure MakeRez does adjust the date format.

## Transferring Your Guest Data

**Manually:** You certainly have the option to start using MakeRez from scratch. Meaning you won't want to load previous, current and future reservations in initially. You can simply take the reservations that you would like to be on the calendar and enter them through the guest page in the normal fashion. The only unusual thing that will happen is, for past guest reservations, the system will detect that the arrival date you have entered is in the past and will ask you if you want to proceed. If you choose to enter prior guest data in this way, make sure that you go to the Admin Page and temporarily blank out the manager email addresses in the config, propGroup and property tables. That will prevent the system from sending out



confirmation messages for a previous stay to those guests. Once you move on to entering in future reservations, you may want to change the manager emails back to their original value so those future guests will get a, somewhat belated, confirmation email.

**Automated:** This process involves building a spreadsheet of all the past, current and future reservations you have and using the tools that MakeRez provides to load them into the database. To start that process download the example [dbInitialLoad.csv](#) file. Take a look at that in your spreadsheet program and you will see the first few lines that look like this.

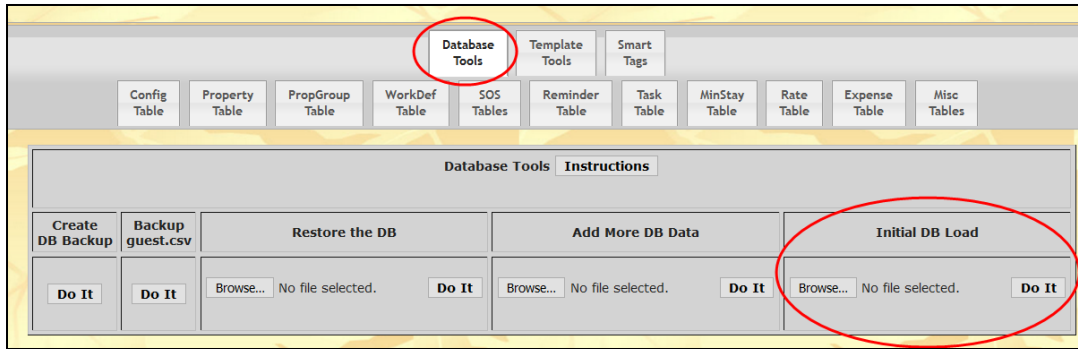
initialContact	guestName	email	street	city	state	zip	cellNum	cellCarrier	altNum	ccfee	source	numAdults	numKids	booked	deposit	arrivalDate	nights	property	totalRent	cleaning	extra	occasion	special	notes	actions
3/4/2010	Debra Stewart	wellendorf_dave@yahoo.com	179 Deer Leap	Marshall	NC	28753	(847) 809-3098			0	1	2	0	Y	100	3/6/2010	1	tt	100	30	0	0	0		
4/2/2010	Danielle Brittin	wellendorf_dave@yahoo.com	179 Deer Leap	Marshall	NC	28753	(847) 809-3098			0	2	3	0	Y	300	4/14/2010	4	tt	600	30	0	0	0		
5/13/2010	Robert Lundquist	wellendorf_dave@yahoo.com	179 Deer Leap	Marshall	NC	28753	(847) 809-3098			0	3	2	0	Y	100	5/14/2010	1	tt	100	30	0	0	0		
5/18/2010	Danese Cooper	wellendorf_dave@yahoo.com	179 Deer Leap	Marshall	NC	28753	(847) 809-3098			0	4	2	0	Y	100	5/28/2010	2	tt	200	30	0	0	0		
5/28/2010	Mike & Barbara Davis	wellendorf_dave@yahoo.com	179 Deer Leap	Marshall	NC	28753	(847) 809-3098			0	5	2	0	N	100	5/29/2010	1	tt	100	30	0	0	0		
3/4/2010	Tim Hammer	wellendorf_dave@yahoo.com	179 Deer Leap	Marshall	NC	28753	(847) 809-3098			0	6	2	0	Y	150	6/2/2010	3	tt	300	30	0	0	0		
5/24/2010	Russell Hoffman	wellendorf_dave@yahoo.com	179 Deer Leap	Marshall	NC	28753	(847) 809-3098			0	7	2	0	Y	100	6/12/2010	2	tt	200	30	0	0	0		
6/5/2010	amy cason	wellendorf_dave@yahoo.com	179 Deer Leap	Marshall	NC	28753	(847) 809-3098			0	8	4	0	Y	300	6/17/2010	4	tt	600	30	0	0	0		
7/6/2010	Joe Hodges	wellendorf_dave@yahoo.com	179 Deer Leap	Marshall	NC	28753	(847) 809-3098			0	9	2	0	Y	100	7/6/2010	1	tt	100	30	0	0	0		
7/5/2010	S. Sterner	wellendorf_dave@yahoo.com	179 Deer Leap	Marshall	NC	28753	(847) 809-3098			0	0	1	0	Y	150	7/26/2010	3	tt	300	30	0	0	0		

You can modify the downloaded file and add in your inquiries and reservations. Hopefully there is an automated process to help build the spreadsheet by transferring information from Google calendar, or other tools where you keep the data. You must not touch the first row since that contains header values that are checked against the database to help make sure the transfer makes sense. If something happens to go wrong with the transfer to the database, don't be concerned. Simply fix the problem and try the transfer again. You might even want to go to MakeRez's blog page for more information.

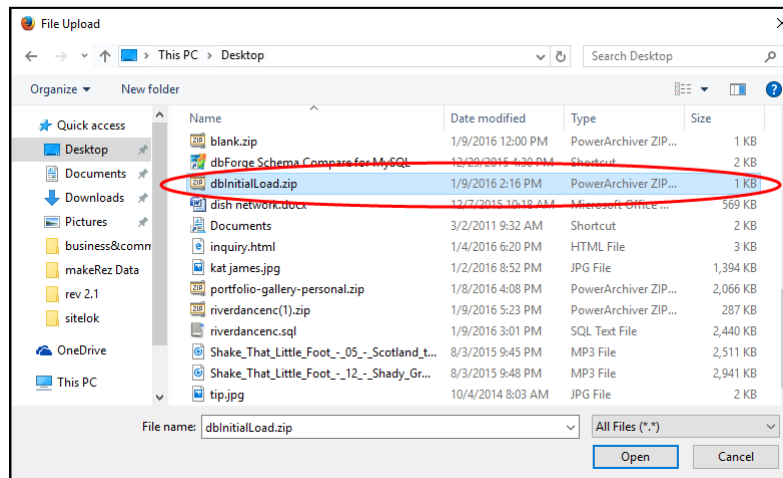
Several things to note:

1. The **initialContact** is the date in mm/dd/yyyy format that the guest first contacted you. If you don't record that information, simply set it to the guests arrival date.
2. **altNum** which is a secondary phone number (after the cell phone number) for the guest should be left blank if it was not recorded.
3. Your best estimate of the number of Adults and Kids should be entered. If you don't have this information, then put in **numAdults** = 2 and **numKids** = 0.
4. Its important to have the **booked** field reflect Y if this was a booking and N if it was just an inquiry that did not turn into a booking.
5. Deposit should be the amount you took as a **deposit** for this guest.
6. Property should be the two digit code assigned to the unit they occupied that comes from the property table. For RiverDance, the Tree Tops suite code is tt and the River Rocks Suite code is rr.
7. **totalRent** and **cleaning** should reflect the guests actual charges. If cleaning is included in the actual unit rate, it should be set to 0.
8. **Extra** charges should be set to 0.
9. The notes, actions and **cellCarrier** field should be left blank.
10. If you haven't collected data on **sources**, **occasions** and **specials** then those fields should be set to 0 which means "unknown".
11. Make sure your data is as accurate as possible since your calendar, and your financial reports will be built using this data.
12. **actions** and **notes** should be blank.

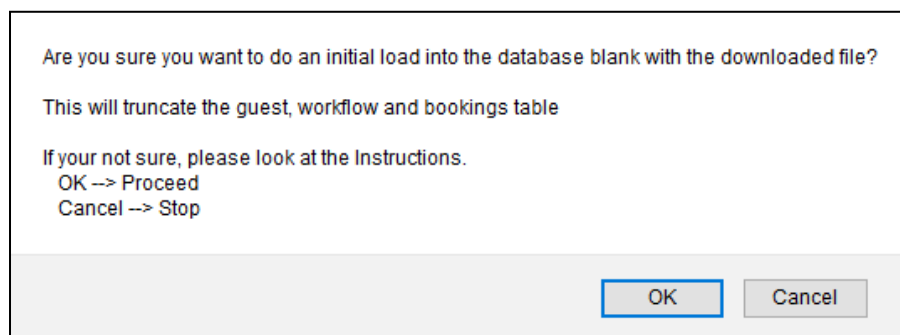
Once you have created the dbInitialLoad.csv file use the systems integrated zip tools to create a zip file with it. Its easiest to store the zip file (dbInitialLoad.zip) on your desktop.



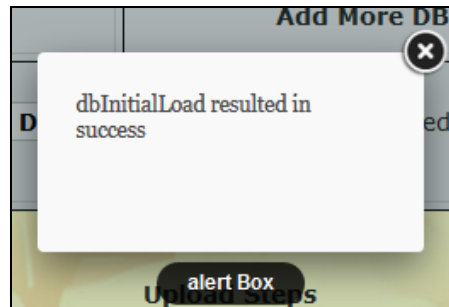
When all your data has been entered into the spreadsheet go to the MakeRez Admin Page. On the Admin Page select Database Tools. You should next use the "**Create DB Backup**" tool to take a snapshot of your current database (all the work you've done in the first part of the on boarding process). That guarantees that if something goes wrong with the processing of the **dbInitialLoad.zip** file, you can always recover to this point. In fact, unless you do a "**Create DB Backup**" immediately before the dbInitialLoad, MakeRez will **NOT** let you proceed. When the database has been backup up go on to the "**Initial DB Load**" section. Next select the "Browse" button



A file browser dialog will appear like the one above and you should select the zip file you just created. If something would happen to go wrong with the dbInitialLoad process, there is a strong likelihood that some of your data may be wrong. One common occurrence is when multiple guests appear to be booked in the same unit on the same day. After choosing "**Open**" in the dialog above to select the zip file you want to do the initial load with, that file name will appear where the "No file selected." string appears in the Initial DB Load section. When you are ready to do the initial load, select "**Do It**". If you haven't backed up your database yet, you will be reminded to and will not be able to proceed until that step is done. After the "Do It" is initiated the following dialog box will appear, warning what will happen. Since you don't currently have any data in the guest, workflow and bookings tables, select "**OK**" to proceed.



When the dbInitialLoad is completed you should see another dialog box like the one below indicating the load was successful.



You also can look at the box below the Database Tools sections for a look at the progress of the dbInitialLoad operation. A sample view of that for the "blank" database is shown below when 10 people were loaded into the system with 9 of them having made bookings and the tenth simply making an inquiry.

```
Name is dbInitialLoad
siteName is blank
New name is ../../sites/blank/dbStuff/fileUpload.zip
File xfer OK

Starting dbInitialLoad unzip
Unzip operation OK to ../../sites/blank/dbStuff/
Starting directory moves
Unlink of ../../sites/blank/dbStuff/fileUpload.zip OK
inside dbInitialLoad
Truncated table guest
Truncated table workflow
Truncated table bookings

field counts OK
added guestId 1
added guestId 2
added guestId 3
added guestId 4
added guestId 5
added guestId 6
added guestId 7
added guestId 8
added guestId 9
added guestId 10
10 records added to the guest/workef table.
9 guests booked.
dbAdd OK
file transfer success
```

## Email Templates

**Email Template Tools** are used to create and maintain the email templates that drive the Relationship Marketing function. While you're in the on boarding process you need to review the standard set of templates that have already been installed when your database was created to modify them to more closely fit how you want to promote your business. The standard set of templates that are already there are the ones we use for RiverDance and in all likelihood may not have to be changed at all. In addition to the email templates you need to decide how to provide images to the email process. If you have all your images on a web server, perhaps the one you use to market your business, then they can stay there. Another choice is to include them along with the email templates that MakeRez stores on its website. The following steps can be used to customize the email templates during the on boarding process. Later on when you only want to change a specific template, the **emailHelper** page (discussed in the manual) should be used.

1. On the Admin Page go to the **Template Tools** section and choose "**Do It**" in the "**Backup Email Templates**" section. This will bundle all the files in your emailTemplates area together and put them into a single zip file that will be transferred to your local computer. After the transfer is complete you will be presented with a dialog box allow you to name the file and to choose where to store it. It is always best to have created an empty directory ahead of time to store the file.
2. Once the zip file is stored in that directory, use your system zip tools to unzip the package in that directory. At that time you should get a number of directories that were created:
  - a. **default** - primary directory for email template files. There are currently 16 different email templates stored there all with a txt file extension. Although all of them have html information embedded in them, they are stored as txt files so your systems standard text editors can view and change them. These files are setup with email tags (see Module 10 of the manual) and you may not have change them at this time. You may want to print a couple out and get a quick understanding of how they are set up.

Also stored in the default directory are contract.pdf (your policies and procedures), inquired.pdf (a mini version of your website in a pdf file) and welcome.pdf (directions on how to get to your lodging and other information about things to do,... before a guest arrives.
  - b. **images** - An image that is typically used at the top of your emails for a specific property group. The filename should match the name of that property group and it should be a .jpg file. For RiverDance this file is RiverDance.jpg Also an image for each room/unit/suite/cabin/.. in your property group that is displayed in the marketing information displayed to a customer when they are deciding which unit to rent. This image should have a name like tt.jpg where tt is the two digit property code for that unit. You can also store other images that you would like to use in your guest emails in this directory if they are not already stored out on the web.
  - c. **custom** - There will be nothing in this directory at this time. Creation of custom email messages will be done in the **emailHelper** page and will be discussed more in that section.
3. After you have made any changes that you desire and added in the needed pdf and jpg files make sure you zip the files from that you have just changed and name the resulting zip file templates.zip. Now you can go back to the **Template Tools** section and use the "**Restore Email Templates**" to select that file and make the changes back at the server.

The **Email Template Tools** allow you to move the entire emailTemplate directory back and forth between your local computer and the makeRez web server. The **emailHelper** application, which is available with the Help Pane, can be used to make individual modifications to a specific emailTemplate. In addition the **File Transfer** section of **emailHelper** can be used to transfer the pdf files for the welcome, contract, inquired functions. Note: These can be created in Microsoft Word and using a free plugin to output directly to a pdf file. emailHelper can also be used to transfer images that you want to use within your emails.

**CONGRATULATIONS !!** Your on boarding is done and you are ready to move on with using MakeRez.