



# Client Onboarding Checklist

Welcome to SuperControl! We are delighted that you have joined the SuperController Community, let's get started.

This Checklist guides you through the basic set-up. It includes step-by-step training that will help you make the most of SuperControl.

You'll be a SuperControl master in no time at all!

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# Admin

Admin > General details: Company details added here display on your guest booking summary. Set up your payment options (to take online card payments you need a payment gateway, contact your Account Manager to discuss), then you can send out payment links to guests via an email straight from your SuperControl account.

Admin > Login users: Add names, email addresses, passwords and access levels for everyone you want to use your SuperControl account. You can see who has made any changes in the booking history of every booking and enquiry.

Admin > Guest login: This enables guests to create a login at the time they place their booking. They can then log in to eg add options and extras and manage their booking(s). Contact your Account Manager to enable this feature.

Admin > Customisation options: Choose calendar colours that match your website and add text to some front-facing pages.

Admin > Terms and conditions: Copy your Ts&Cs here (paste as plain text). Guests cannot submit a booking without accepting them. If you leave this field blank, guests can book anyway leaving you open to potential problems.

Admin > Subscription options: GDPR requires you to allow guests to opt in/out of being contacted by you in the future and to get consent to keep their contact details.

Admin > Integration HTML: This provides the HTML links your web developer needs to add your availability calendar and booking pages to your website. You can use these links to check the guest's booking experience, place a test booking to see how it's looking.

Admin > Housekeepers > Add: Housekeepers can be added so you can keep their details on file and give them a login. They will then be alerted about new/cancelled bookings and be able to view arrivals and departures.

Admin > Agents > Add: Adding an agent allows you to apply an agent's booking commission. You choose how to calculate this.

Admin > Address book: This is a handy place to store all business contacts, for ease of access.

Admin > Logo upload: Your company logo will then display above guest booking summaries and letter templates.

## Properties

Properties > Add: Enter your property details, start days, enable short breaks and more. \*It's important that you contact us when you have completed this if you want design matching\*.

Properties > Property Groups: Group properties together for extra convenience.

Properties > Search Variables: Help guests refine their search by adding search variables eg pet-friendly, sea view, open fire, car parking.

Properties > Edit > Settings > Custom text: When you've added your properties, additional menus appear at the top of the Properties page. You can add your own text above the availability calendar. Great for catching guests' attention before they book.

Properties > Edit > Settings > Price planner: Set your weekly, daily and short break pricing here. You have complete control of pricing and availability throughout the year.

Properties > Edit > Settings > Discounts: You can setup a range of discounts as a booking incentive.

Properties > Edit > Options/Extras: Can guests add flowers, logs or anything else to their booking? Add them here.

Properties > Chart Display: Set how far in advance guests can see availability on your calendars (we recommend you always show at least the next year ahead).

## Bookings

Bookings > Grid view/Availability search/Add bookings: These menus all direct you to the same booking screen – you can work out which suits you best. This is where you manually add bookings that you might take over the phone or in person.

Bookings > Booking sources: Enter all the places guests might have heard about your property. Guests tick the relevant box during the booking process, so you can see where your marketing spend is working best.

Bookings > Customer ratings: This is where you can add guest ratings or even an option to blacklist. This doesn't stop a guest from making a provisional booking but will alert you so you can reject the booking if you want to.

## Enquiries

Enquiries > Add: Turn enquiries into bookings. Record any enquiries you receive, then send a quote enabling them to book direct with you.

Once you have added an enquiry you can edit them too, simply go to *Enquires > View/Edit*

SuperControl has lots of useful features. You can set follow-up reminders which will prompt you to respond to enquiries you have received.

## Emails

Emails/Letters > Add: Creating email templates saves you time when sending out standard emails to your guests. These can then be linked to Auto emails (see below).

Emails/Letters > Automated emails/SMS: You can set criteria so emails and SMS send automatically when these are triggered, you won't even have to click a button.

Emails/Letters > Global documents: You can upload documents from your device, which can then be sent to your guests (eg arrival instructions).

Emails/Letters > Booking summary customisation: Add/amend global information that appears on the booking summary (eg BACS and cheque payment details).

# Integrations

Integrations > Channel manager: Listing your holiday rentals on big booking websites can really help boost your bookings. SuperControl integrates with Booking.com, Airbnb, HomeAway and many more so you can manage your listings in one place – no need to spend time updating them all separately or updating numerous calendars. Get in touch with your Account Manager for more information.

Integrations > UpFront Reviews: This is SuperControl’s free verified review service that you can opt in to. It automatically sends a feedback request to each guest that stays.

Integrations > Admin tools: These include Apple Wallet and Survey Gizmo. There is more information and set-up guides within each page.

Integrations > Online payment gateways: Taking online payments is more important than ever. Find out which payment processors we link with and apply online.

Integrations > Social media: If you have more than 2000 followers on Facebook your SuperControl account can integrate. They enable guests to check availability and book straight from your Facebook page. Please ask your Account Manager to enable this.

Integrations > SuperControl API: If you would like your web developer to create a more customised SuperControl integration for your website, contact your Account Manager to access this (there is an annual fee of £275).

Integrations > Booking Protect: Booking Protect enables your customers to add holiday insurance to their booking. Apply and set this up here.

Integrations > Rental Guardian: Accidental damage protection that provides your guests with cover for any unintentional damage they cause to your property during their stay.

That’s it! When you have completed this checklist you’ll be ready to join us for our online tutorials to discover even more ways to make the most of SuperControl.