The Heart of Hospitality

Effortless Communication: Tools to Enhance Guest and Owner Experiences

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The **Heart** of Hospitality

Today’s Speakers

Cindy Geraghty
Lead Accounting Implementation Consultant

Justin Saunders
Operations Implementation Consultant

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Owner Portal & Owner Communications

- Current owner portal overview
- How to set up Owner Communications
- How to use Owner Communications

Guest Portal and Communication

- Guest Portal overview
- Setting up Guest Requests for communications
- Using custom content to inform guests

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Owner Portal and Owner Communications

How to Enhance Your Owner Experience

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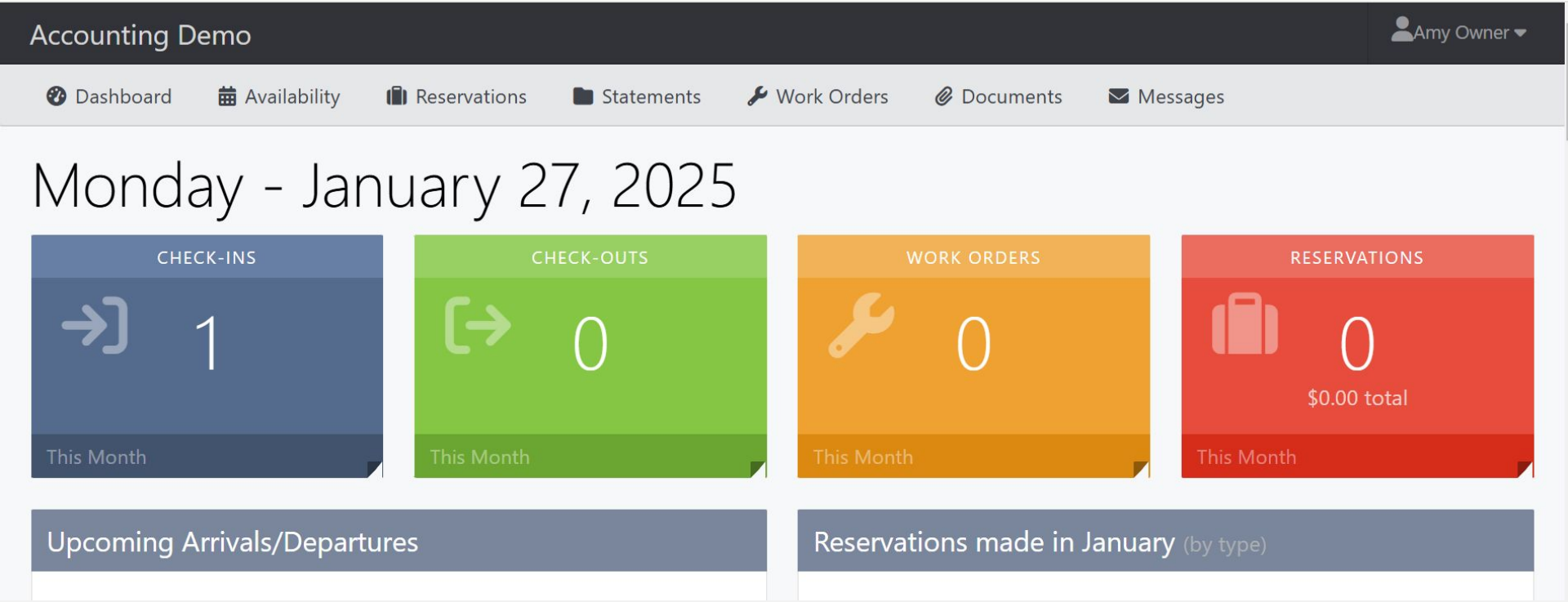
Owner Portal Dashboard



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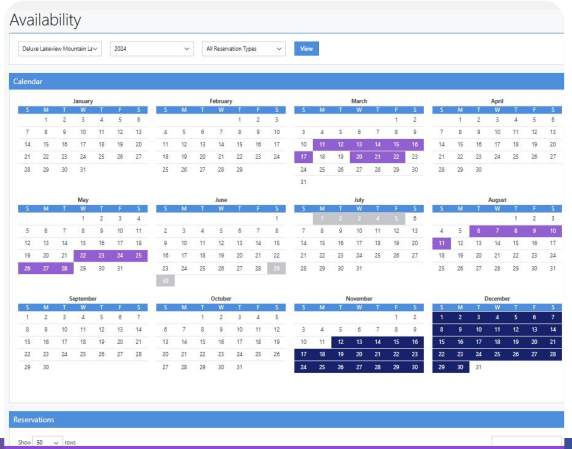
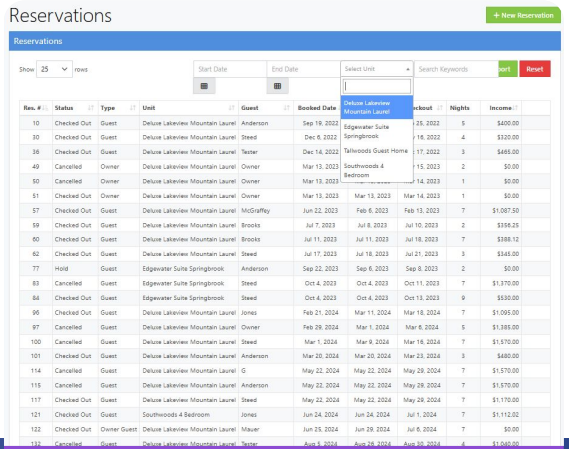
Owner Portal



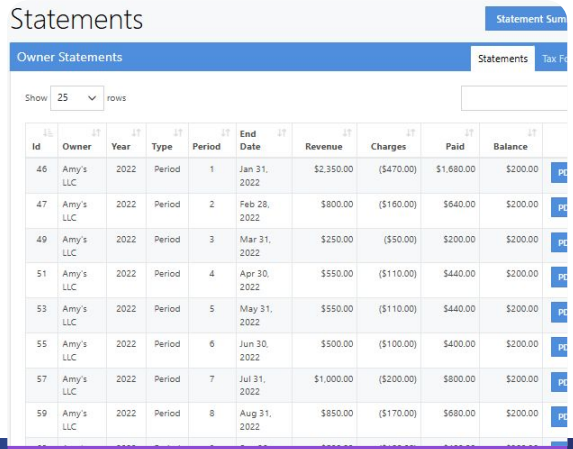
Availability

- You are provided with Reservations (bookings) across your Unit(s) for the current year
- In both a calendar view and list view you can choose which calendar year and what unit from the dropdowns they'd like to view.



Reservations

- You can see all prior, current, and future Reservations in your Unit(s).
- You can also create a new booking in your Unit(s), by clicking the green "+New Reservation" button towards the top-right corner.
- If you allow owners to create their own reservations, they will do so on this tab



Id	Owner	Year	Type	Period	End Date	Revenue	Charges	Paid	Balance
46	Amy's LLC	2022	Period	1	Jan 31, 2022	$2,350.00	($470.00)	$1,680.00	$200.00
47	Amy's LLC	2022	Period	2	Feb 28, 2022	$800.00	($160.00)	$640.00	$200.00
49	Amy's LLC	2022	Period	3	Mar 31, 2022	$250.00	($50.00)	$200.00	$200.00
51	Amy's LLC	2022	Period	4	Apr 30, 2022	$550.00	($110.00)	$440.00	$200.00
53	Amy's LLC	2022	Period	5	May 31, 2022	$550.00	($110.00)	$440.00	$200.00
55	Amy's LLC	2022	Period	6	Jun 30, 2022	$500.00	($100.00)	$400.00	$200.00
57	Amy's LLC	2022	Period	7	Jul 31, 2022	$1,000.00	($200.00)	$800.00	$200.00
59	Amy's LLC	2022	Period	8	Aug 31, 2022	$850.00	($170.00)	$680.00	$200.00

Statements

- This is where all owner statement will publish.
- They will have access to Year End Tax forms and a statement summary report as well

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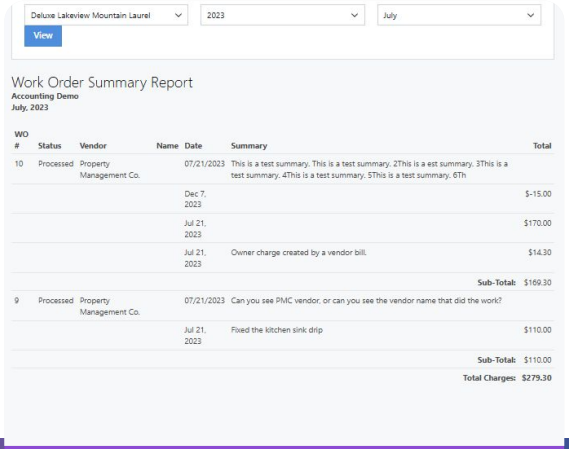
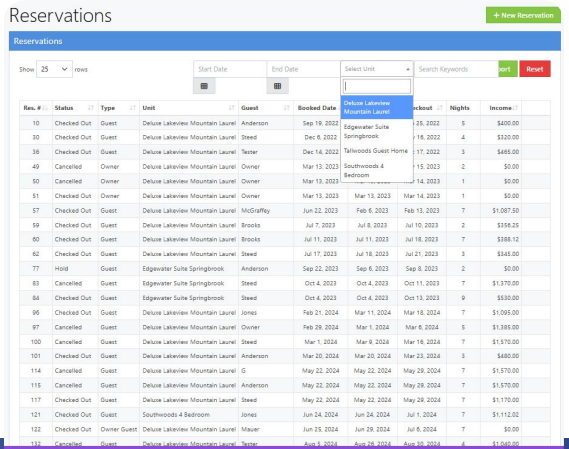
Owner Portal



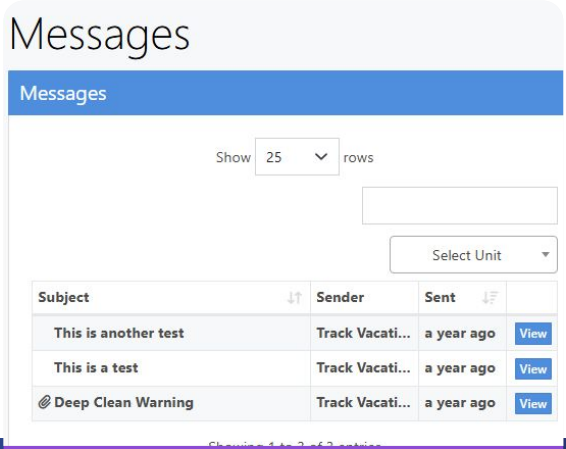
Work Orders

- You will be able to see Work Orders that have been completed in their Unit(s), by month, along with any associated charges that you've incurred from any of those Work Orders



Documents

- Various documents may be shared with the owner.
- To access any Documents you see here, click the applicable line item's View button.



Messages

- This is the owner's message inbox. Any messages sent through owner communication will live in this inbox.

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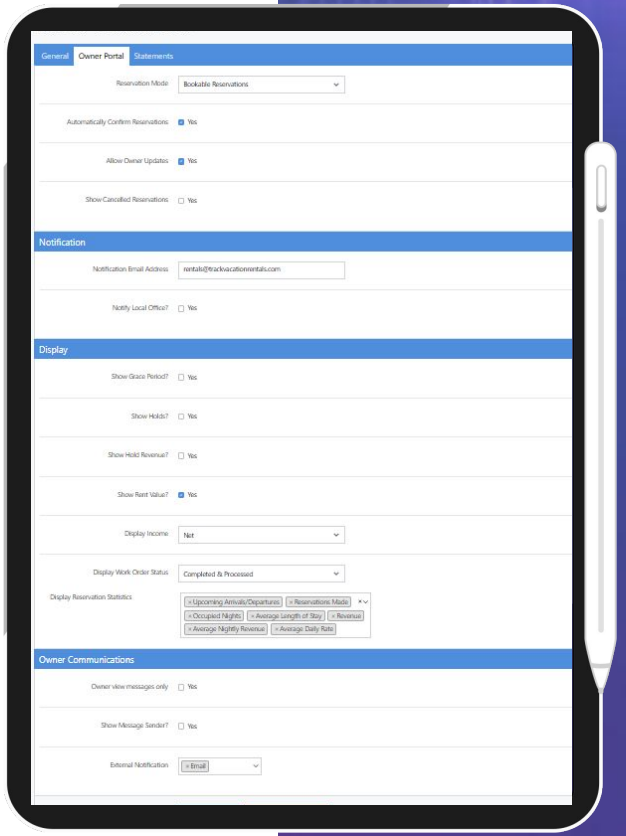
Owner Communication Settings

Configuration>Owners>Preferences

- Should the messages be view only?
- Would you like the owner to see the individual sending the messages or do you want them to see your company as the sender?
- How do you want the owner to be notified?



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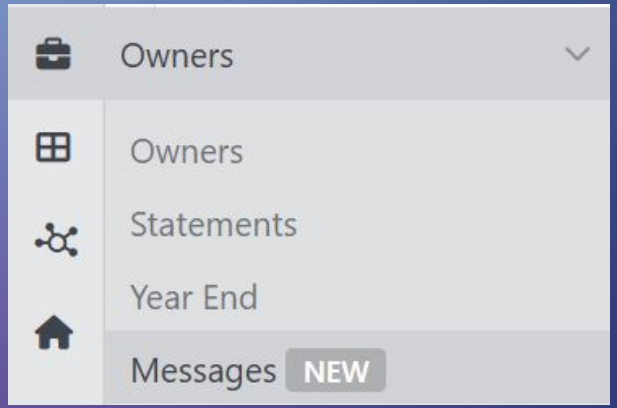
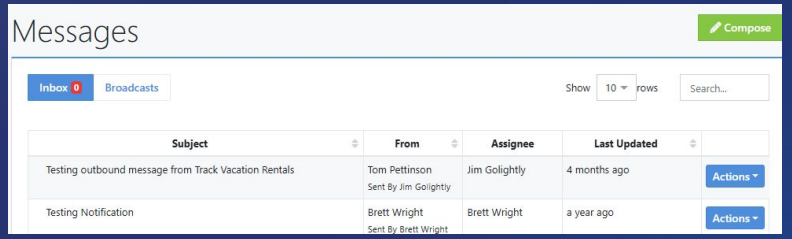
Owner Messages:



Message Home Screen



Your inbox is where you'll see new owner messages and compose new messages.

Personal Message vs. Broadcast

- Single owner communication
- A way to get secure documents through the platform instead of directly through email

- To reach a large audience quickly
- A way to gather secure information from a large group through Track
- Send out a balance due reminder when owners have a negative balance

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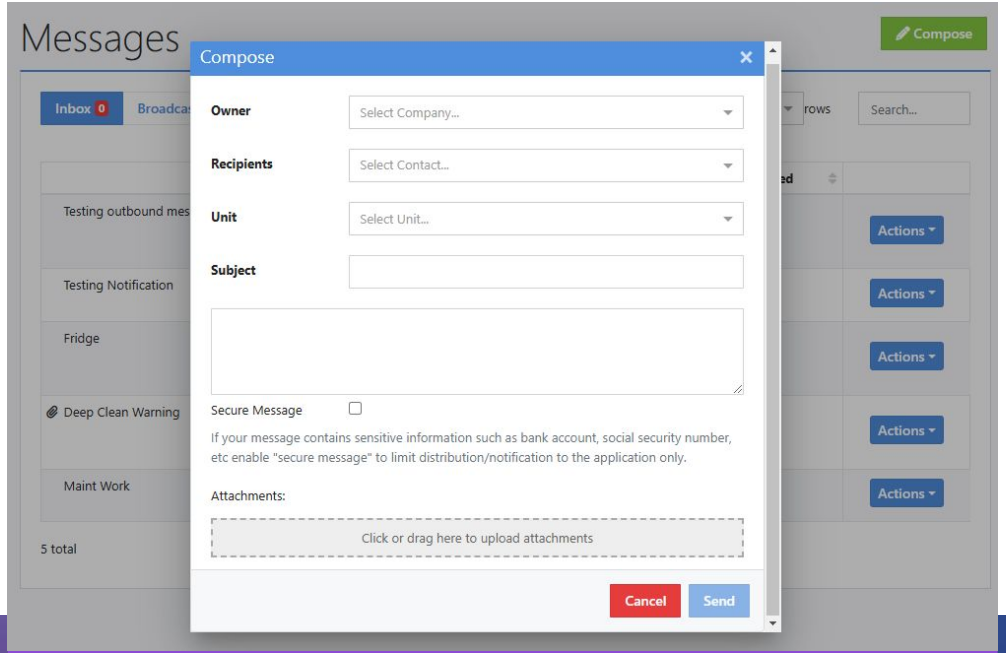

Personal Owner Message

Choose your parameters and send it out quickly!

- Message will send to owner via text/email
- Messages will store in the inbox
- Owners will be able to respond if you allow them to do so
- Sender will be shown based on your configuration settings

- **Owner**: Choose the owner company
- **Recipients**: Will generate based on available contacts under the owner company
- **Unit**- choose unit under the ownership
- **Subject**: what will appear as the subject line
- **Messages** body: context of your message
- **Secure message**: requires owner to log in to read
- **Attachments:** Attach forms, pictures that you'd like to be included in the message

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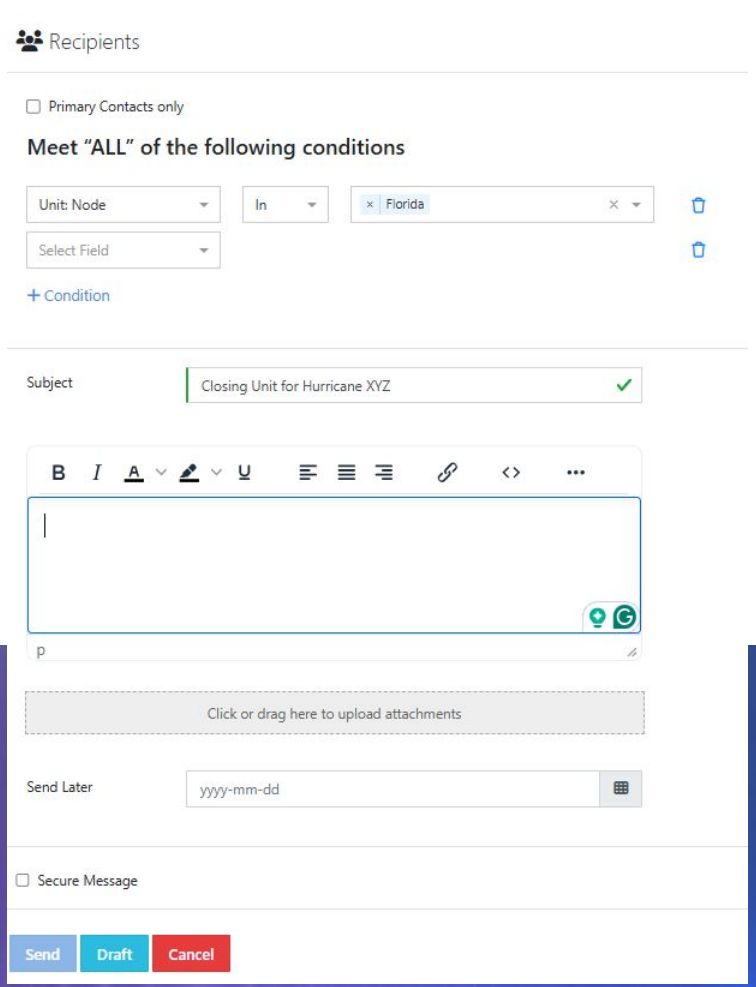

Broadcast Message

Select your conditions of who should review the message

- Set the message up conditions of who should review the messaging
- Conditions are “Meets All”
- Choose to send out now or later
- Broadcasts will show under the broadcast inbox

- **Primary Contact**: Only send to the primary contact on the owner companies that meet the conditions
- **Conditions:** Choose your conditions of who should receive the message
- **Subject**: what will appear as the subject line
- **Messages** body: context of your message
- **Attachments:** Attach forms, pictures that you’d like to be included in the message
- **Send Later:** choose the date you’d like the message to send
- **Secure message**: requires owner to log in to read
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Guest Portal

How to Enhance Your Guest Experience

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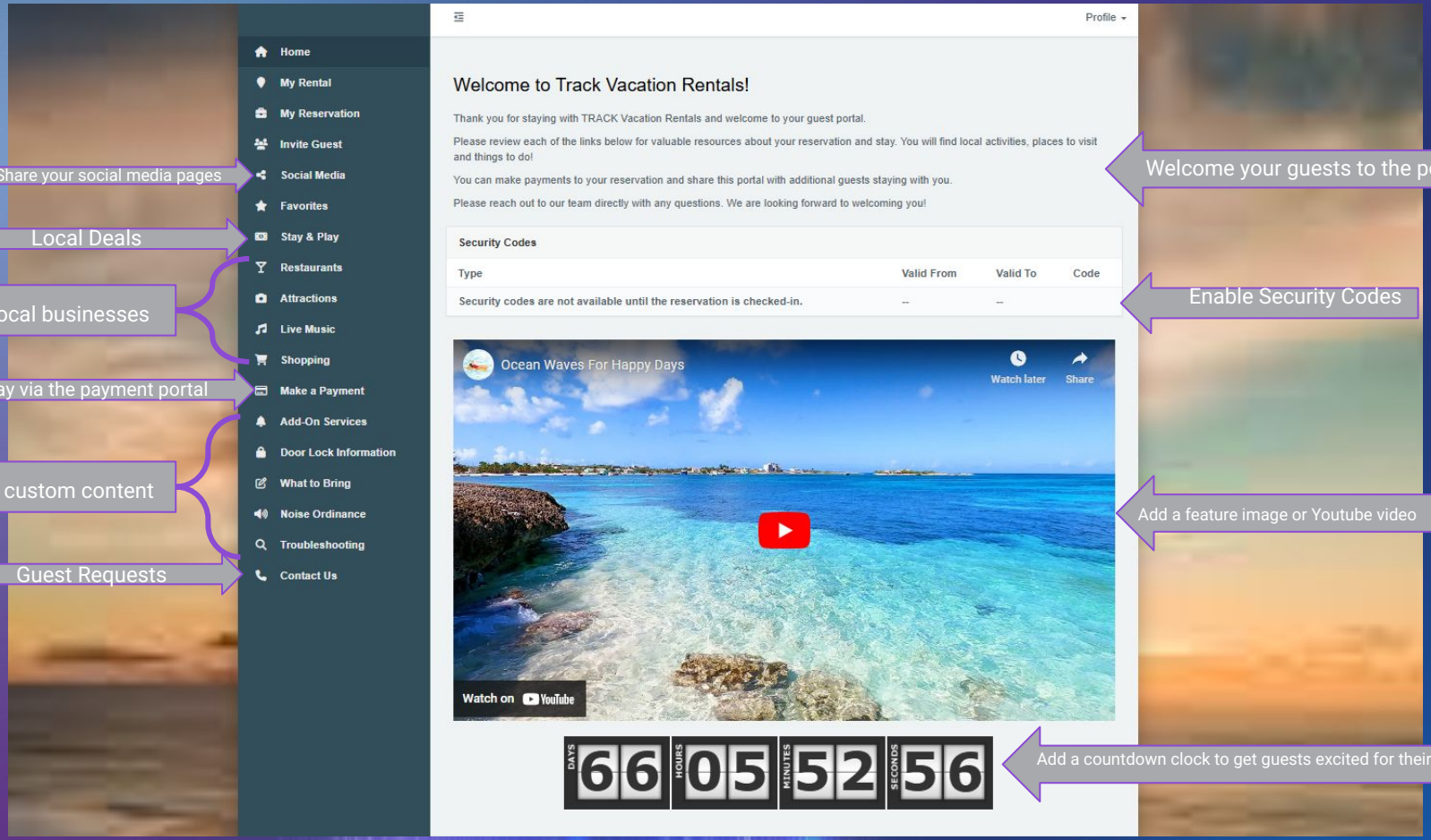
Home
My Rental
My Reservation
Invite Guest
Social Media
Favorites
Stay & Play
Restaurants
Attractions
Live Music
Shopping
Make a Payment
Add-On Services
Door Lock Information
What to Bring
Noise Ordinance
Troubleshooting
Contact Us
Profile
Welcome to Track Vacation Rentals!
Thank you for staying with TRACK Vacation Rentals and welcome to your guest portal.
Please review each of the links below for valuable resources about your reservation and stay. You will find local activities, places to visit and things to do!
You can make payments to your reservation and share this portal with additional guests staying with you.
Please reach out to our team directly with any questions. We are looking forward to welcoming you!
Security Codes
Type
Valid From
Valid To
Code
Security codes are not available until the reservation is checked-in.
Ocean Waves For Happy Days
Watch later
Share
Watch on YouTube
DAYS 66
HOURS 05
MINUTES 52
SECONDS 56
Share your social media pages
Local Deals
Feature local businesses
Pay via the payment portal
Add custom content
Guest Requests
Welcome your guests to the portal
Enable Security Codes
Add a feature image or Youtube video
Add a countdown clock to get guests excited for their stay

My Rental

My Rental

Phoenix Oasis	
Bedrooms	4
Bathrooms	3 Full
Max Occupancy	10 People
Unit Area	1835 sq. ft.
Pets Allowed	Yes (Fee may apply)

Check-in Details

Guest will be sent an email one week prior to arrival with check-in details and arrival information.

Security Codes	Misc	Amenities	Address/Map

WiFi Network Name	Track Vacation Rentals Guest
WiFi Network Password	No password required

My Reservation

Reservation #2323

Reservation Details	
Status	Confirmed
Unit	Phoenix Oasis
Stay	Apr 5, 2025 - Apr 12, 2025 / 7 Nights
Pets	1
Early Check-in	No
Check-in Time	4:00:00 PM
Late Checkout	No
Checkout Time	10:00:00 AM

Guest Breakdown	
Rent	$3,300.80
Cleaning Fee	$400.00
Damage Waiver	$75.00
Pet Fee	$150.00
Golf Cart	$200.00
Subtotal	**$3,805.80**
Taxes	$770.22
Total	**$4,576.02**
Payments	-$2,288.01
Remaining Balance	**$2,288.01**

Date	Description	Type	Amount
Jan 16, 2025	CC visa/1111 Payment received on reservation creation	payment	-$2,288.01
Jan 16, 2025	Reservation Fee posted to Folio #2334	fee	$121.97

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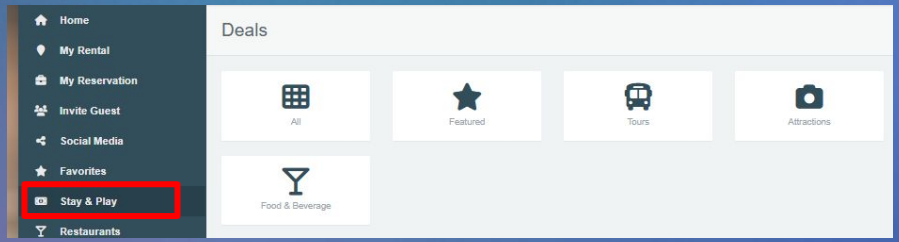
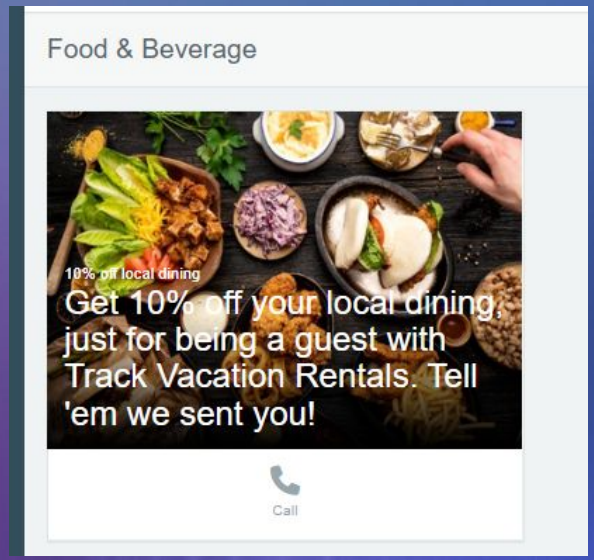
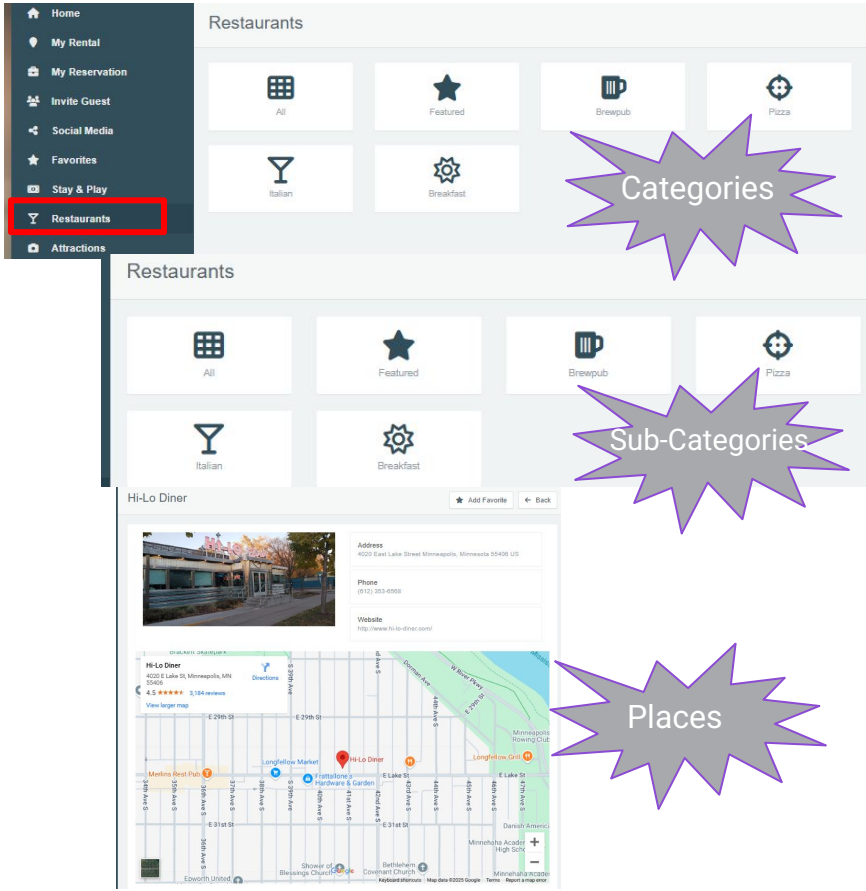
Local Deals





Places



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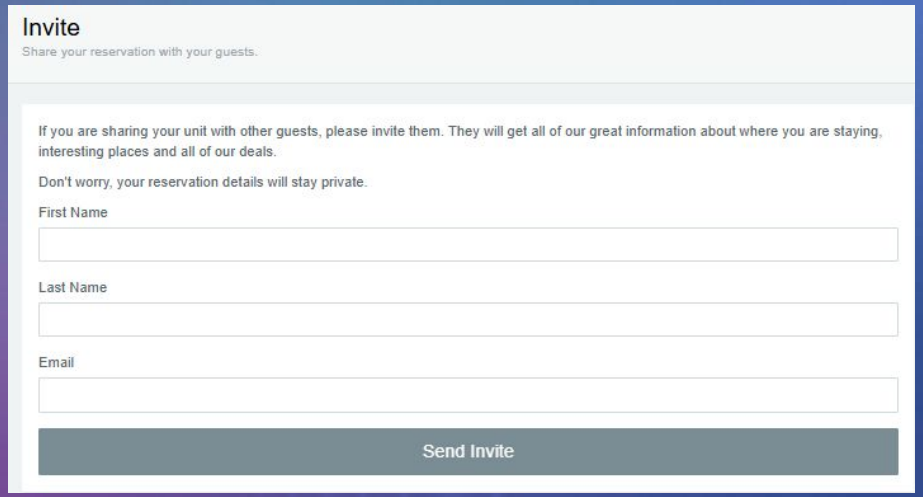
Guest Can Invite Other Guests to the Portal



Share Your Social Media Pages

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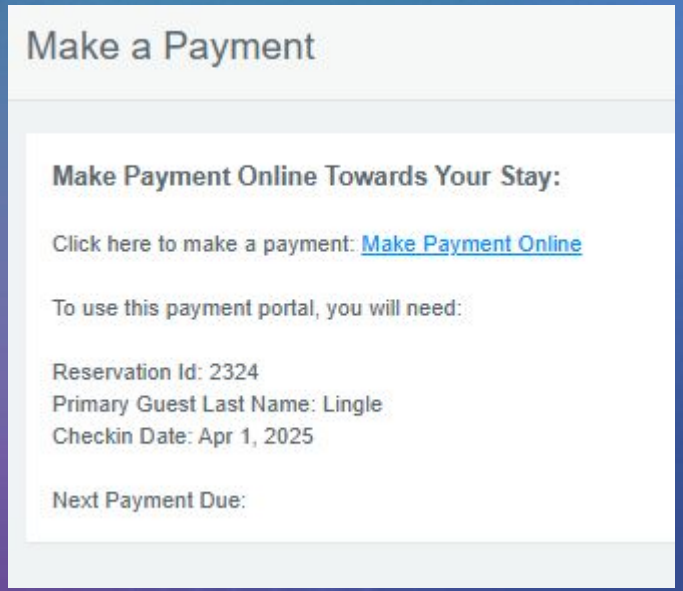
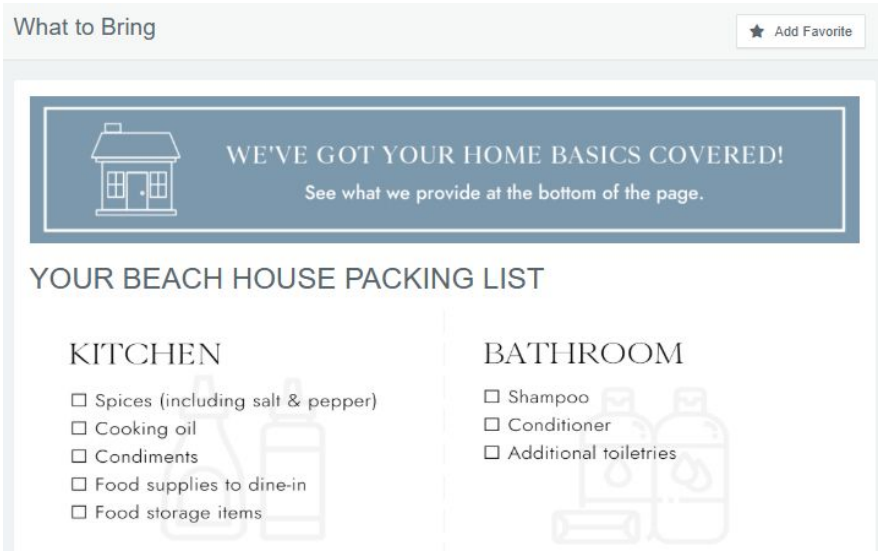
Pay via the Payment Portal



Add Custom Content



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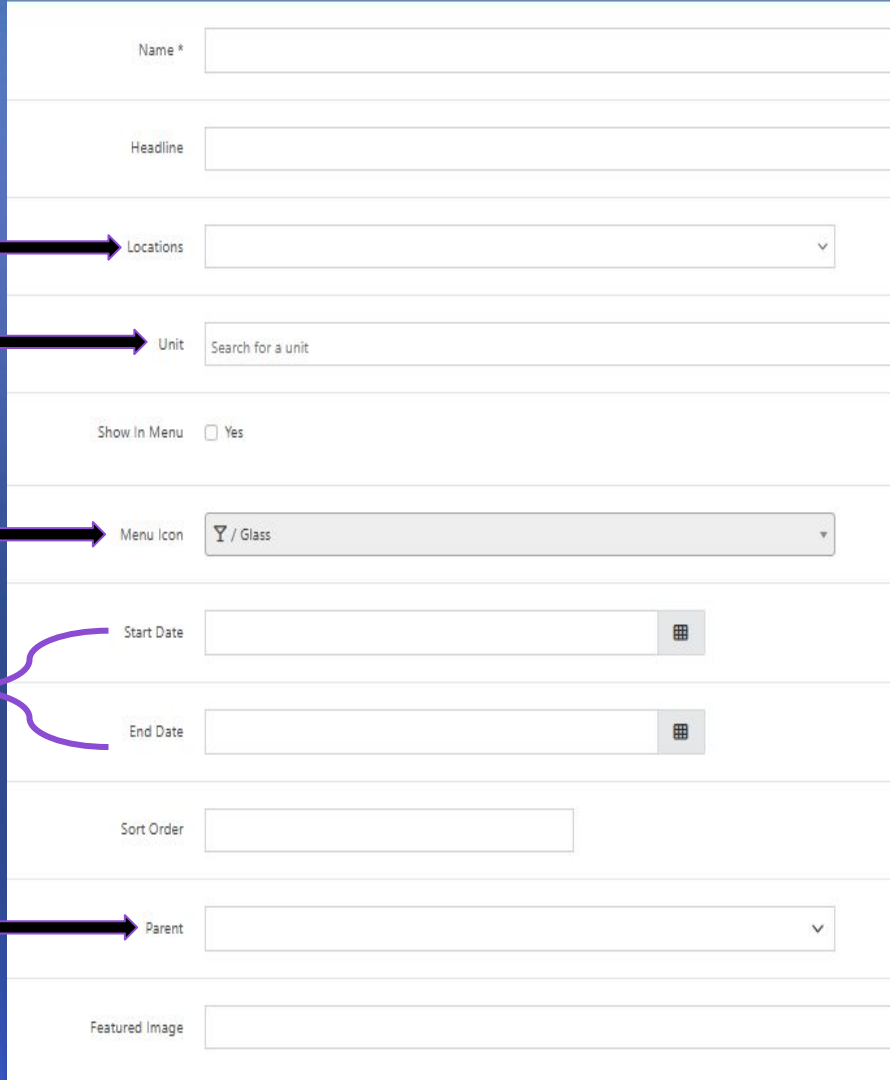
Let's talk about Custom Content

- Control which locations you want the content to appear
  - Choose from the nodes that have been configured
- Control which units where you want the content to appear
- Select the icon that you want to appear in the menu
  - Track has many to choose from, including the Spock Hand! / Spock (Hand)
- Choose a start and end date that you only want the content to appear for
- Do you want the content to appear within another custom content?



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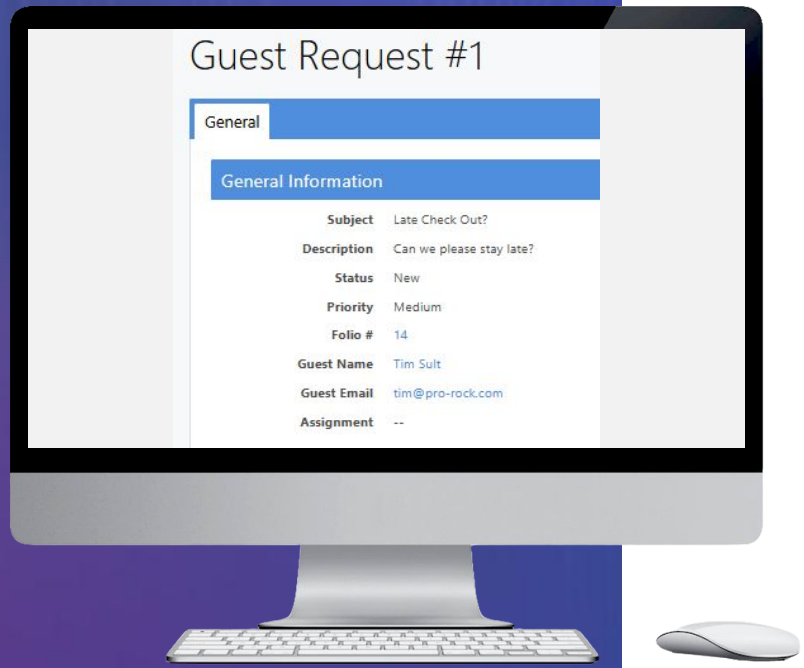
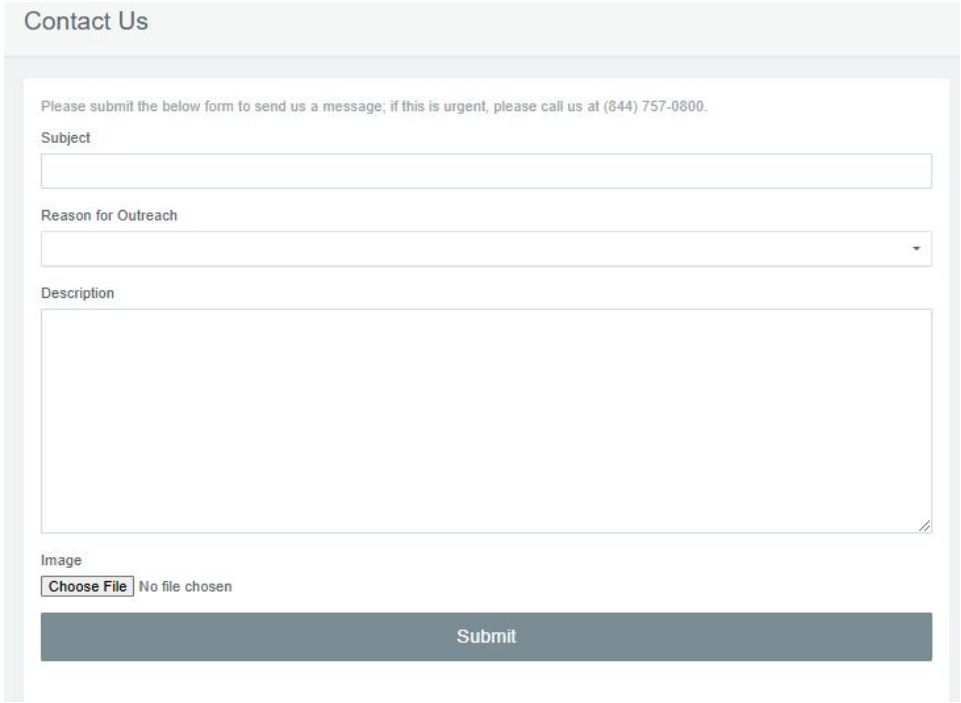
Now let’s talk about Guest Requests

This allows guests to reach out to you directly from the Guest Portal!





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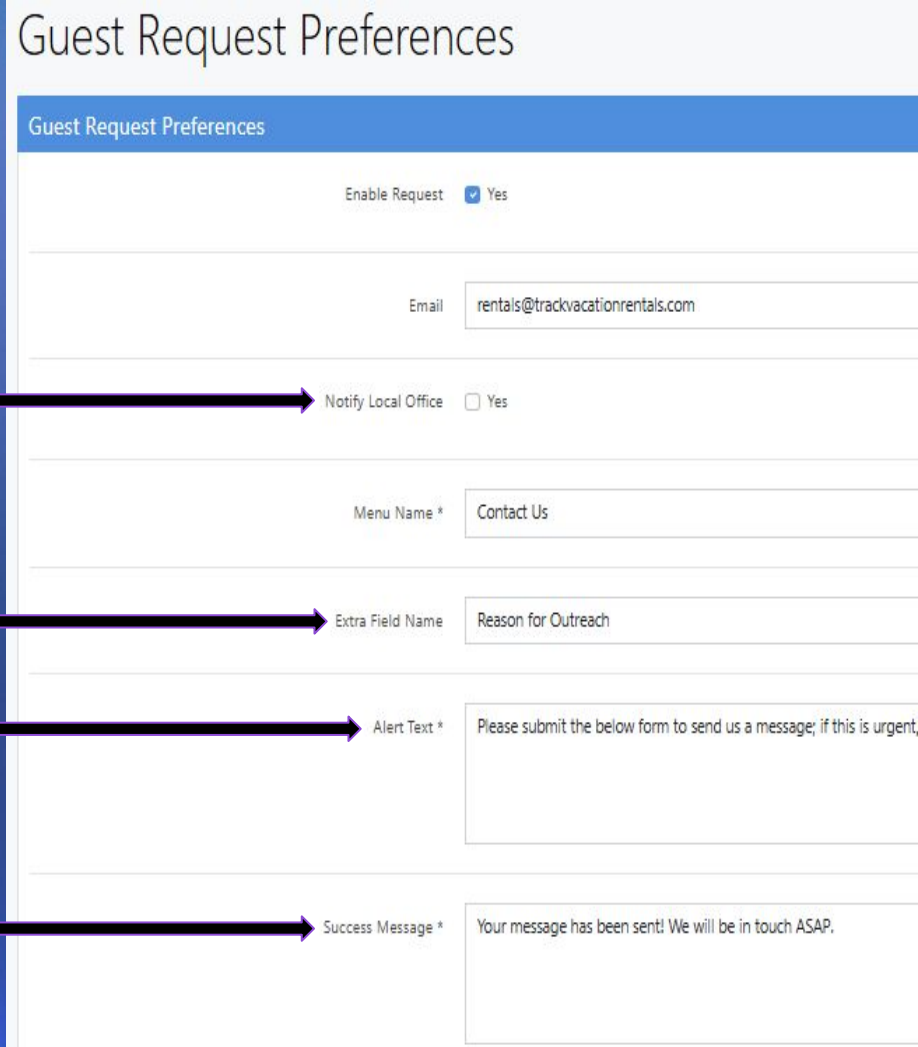
Configuring Guest Requests

- Will use the location tree to determine the office of that unit and send a notification to the email address associated with that office
- An extra field is a select input that you can custom define and will be included in the request
    - Is shown directly above the Guest Request form. Can use verbiage like, “If this is an emergency, call 911”
- The message that is displayed after the Guest Request has been submitted



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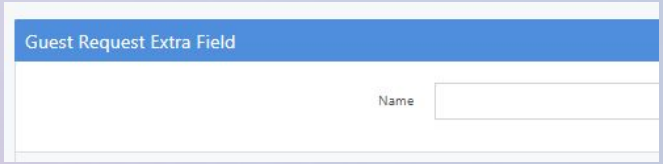
Additional Guest Requests Options…



Configure extra fields related to Guest Portal request entries

- Add-On Request, Book Future Stay, Housekeeping Request, Maintenance Request, Other, etc.

Enter the name of the status to be selected when adding/editing a guest request

- Completed, In-Progress, New, Archived, etc.

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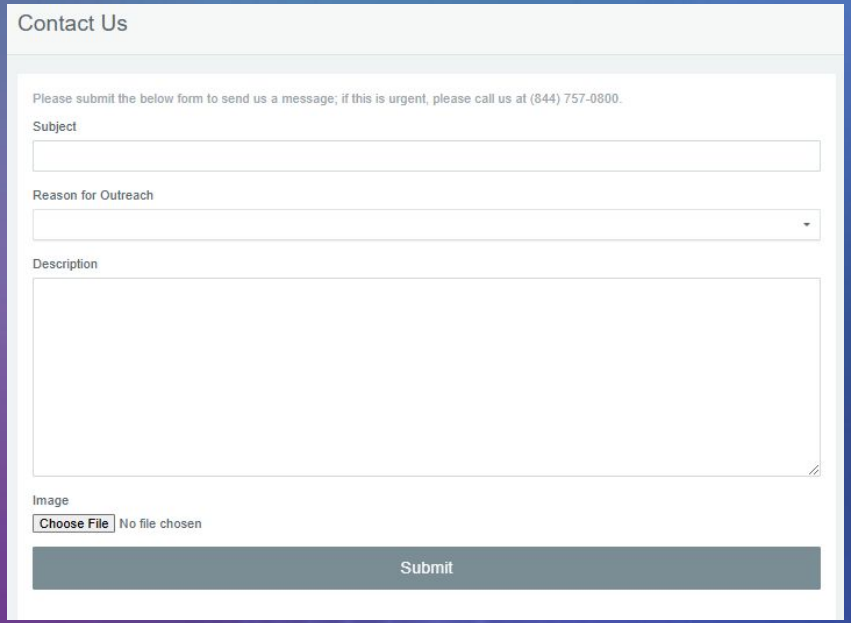
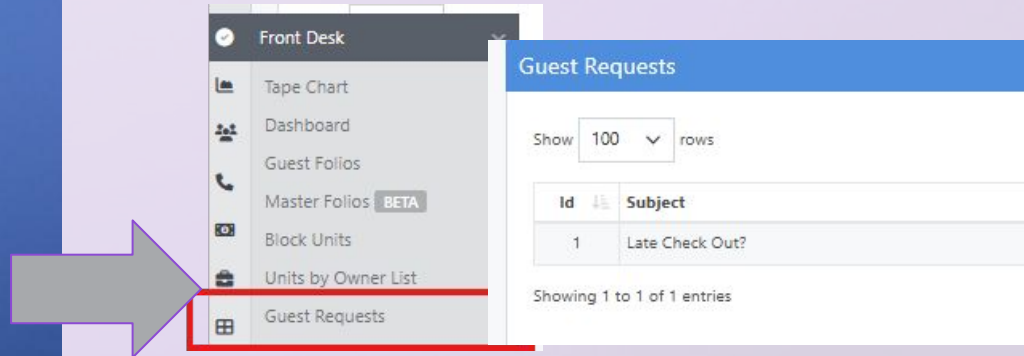
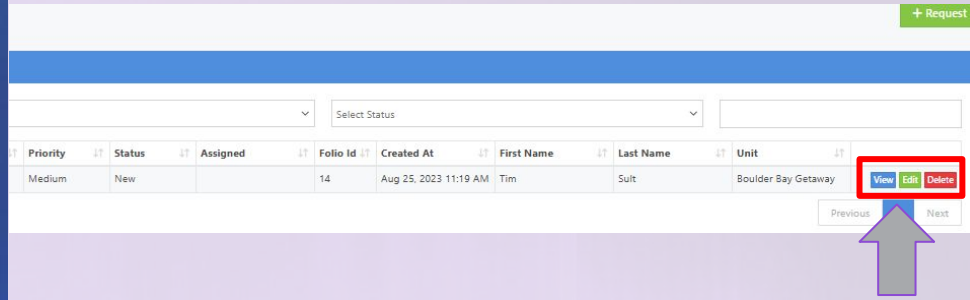
Once this form is submitted, it goes…

Here!







View, edit or delete the Guest Request

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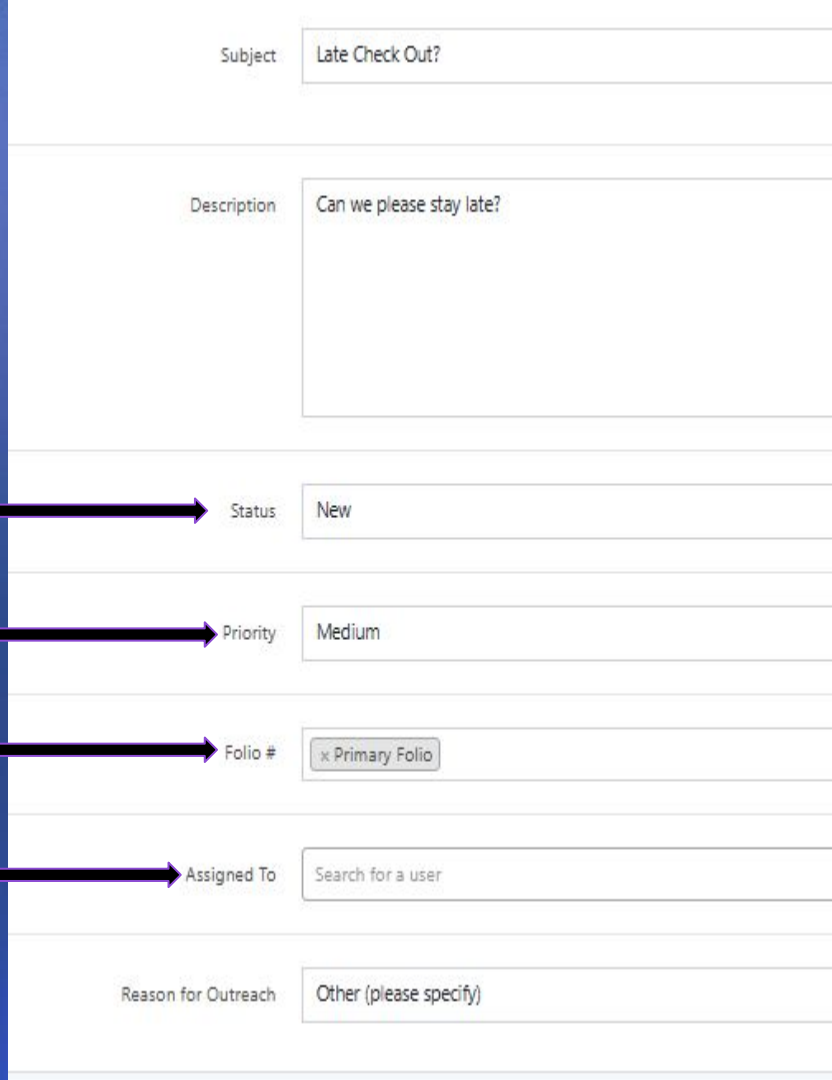
When clicking “View” on the Guest Request

- Manage the current status of the request
- Select the Priority of the Request
- If the request is related to a folio, find and select the folio number
- Select who is assigned to take care of the request



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Questions?

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