The Heart of Hospitality

Reservations Best Practices

Maximizing Reservation Efficiency in Track



The Heart of Hospitality

Today's Speaker



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Step 1 : Maximizing Track's Quote Feature Sending and Saving Quotes to Guests via the Tape Chart

Step 2: Mastering Automations & Triggers in Track Sending Documents, Creating Work Orders

> Step 3: The Benefits of the Guest Portal Get guests excited for their stay with you!

Step 4: Creating Impactful Reservation Documents What message do you want to convey?

Step 5: Improving Your Workflow with Track's Reservation Features Utilize Batch Print Documents, Units by Owner List, Bulk Reservations and Block Units





Maximizing Track's Quote Feature

Quotes

What is a "Quote" in Track?

A "Quote" in Track is an object separate from a reservation. It does not put a hold on a unit or block availability. It is a promise to honor the pricing for the specific unit(s) until the quote's expiration date.







There are 2 Ways to Create a Quote in Track







Benefits of Using Quotes in Track

A Quote can be sent to leads via Content Blocks in the lead form or a combination of Content Blocks and Quote Links

When sending or saving quotes to guests in Track, a first name, last name and email address are required. This will then create the guest as a contact

Quotes can be sent via SMS or Email or both

Promo Codes can be added to Quotes and show the total including the discount added

If your Saleslink is set to sync the lead, it will automatically close the lead and attribute the booking if someone books through the Quotelink



Configure Your Quote

- 1. When do you want your quote to expire?
 - Choose a sufficient amount of days to have the quote expire
- 2. What is the email subject line?
 - Use Merge Field to customize and attract the recipient
- 3. What do you want your email and SMS intro message to be?
 - Thank the recipient for contacting you and express your interest in then staying with you
- 4. Search Alternative Units
 - When the unit to book is unavailable, allow the guest to click on a link to search for another unit they can book
 - Ensure a "Quote Booking Redirect URL" is entered, which will be the link that the guest clicks on to view other units
- 5. View Listing Link URL

NEXT

A "View Listing" button will appear in emailed quotes allowing guest to view more information about the property in the quote

Dear Albrecht,

Thank you for your recent inquiry. Below are some properties that you may have interest in. Please let us know if we can answer any additional questions that you might have.

Quote from Track Vacation Rentals

We look forward to hearing from you as soon as possible; please note that quotes expire after 24 hours.



View Listing

Valid until Jan 24, 2025

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The Guest Receives the Quote

- The featured image for the quote pulls from what is set at the unit profile
- The reservation dates for the quote appears
- The total is revealed, which will include taxes & fees and a promo code discount (if applicable)
- The max occupancy, # of bedrooms and bathrooms displayed is pulled from the unit profile
- Guests can click on Review and Book which will take them to the page where they can finish their booking
- Guests can click on the View Listing button, which will take them to the webpage of the unit. This is configured on the unit profile's Website URL field
- The expiration date of the quote is displayed at the bottom of the quote

Townhome

Mill Dist City Club 103*



Rate for 06/07 - 06/14:

\$3,302.85 Includes taxes & fees

Sleeps 8, 3 Beds, 2 Baths

Review and Book

View Listing

Valid until Jan 24, 2025



But the Guest Wants You to Book their Quote...





About Quotes...

Can you answer these questions?

- 1. What are the 2 ways to create Quotes in Track?
- 2. What fields are required in order to send or save a quote to a guest in Track?
- 3. Sending a quote to a guest will place a hold on the unit and block availability until it is booked by the guest. True or False?
- 4. The guest calls in and wants to book their quote, but doesn't want to do it themselves. Where do you go to look up their quote and book for them?





Mastering Automations in Track through Triggers & **Automations**

Sending Documents, Creating Work Orders



What is the difference between a "Trigger" and an Automation?



If you want an action to occur when another event happens

A reservation has been made and has come into Track. A booking confirmation email will now be sent to the guest



If you want an action to occur on a specific time schedule

A day before the guest arrives, a pre-arrival instructions email is sent to the guest



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When Building a Trigger or Automation...

Determine: What do I want to do and Who do I want to Send This to or Create This For?



Choose Meet "ALL" of the following conditions if you wish to have all of the conditions in your trigger or automation to be met in order for it to send

Meet "ALL" of the following conditions

Choose Meet "ANY" of the following conditions if you have conditions, but do not require all of them to occur for the trigger or automation to send. It will send if one of the conditions is met.

Meet "ANY" of the following conditions



Some Helpful Conditions

What are the Reservation Types I want to include or not include in this Trigger/Automation?

Туре	~	not in	~	Owner ×	Owner Guest $ imes$	Owner Referral X

Do I only want this to go to reservations that have these tags attached?

Tags	✓ in	✓ Firewood	d × Pool Heat ×

Recommend creating a start date so that old recipients do not get the same document (Ex. Booking Confirmation Email)

Booked Date	~	greater than and equal to	~	01/23/2025	▦
-------------	---	---------------------------	---	------------	---

Will this Trigger/Automation be relevant to anyone who does or does not have an outstanding balance?

Remaining Balance	~	less than and equal to	~	1.00
Will	l the reginion	at nood to have been oon	t on E Sig	A groom ont?
VVII	i the recipier	it need to have been sen	it all E-Sigi	r Agreement?



Perform These Actions

Tips on how to choose the correct action



Action: Send Email

Only choose this action if you wish to have the email saved within the trigger/automation. If the trigger/automation is deleted, this will also delete the email

Action: Send Reservation Message

Will send to Airbnb guests. Do not include links, phone numbers or email addresses or sending the message may fail

Action: Send Text Message

Ensure that your SMS inbox has been enabled and that the texting feature is functioning properly before adding this as an action

Action: Create HK Work Order

Can only be selected as an action when "Reservation" is chosen as the Object of the trigger/automation. Can be used separate from HK Preferences (Departure Clean Interval), especially to automate other clean types

Action: Create Maint Work Order

Can only be selected as an action when "Reservation" is chosen as the Object of the trigger/automation. Ensure that Maintenance Work Order Template has been created in order to use in the trigger/automation



About Triggers & Automations...

When to use which one?

- 1. A guest is arriving within the next 7 days but has an outstanding balance.
- 2. The guest signed a Rental Agreement and you want to send an email confirming that it was received and thanking them for signing it.
- 3. A special request was added to a reservation and you want to create a task for a user to complete the special request for the guest
- 4. A unit has been vacant for more than 14 days and you want to create a housekeeping work order to clean the unit
- 5. The guest has departed and you want to create and send a survey to them





The Benefits of the Guest Portal

Get guests excited for their stay with you!



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A Home

- My Rental
- 😑 My Reservation
- 🕌 Invite Guest
- Social Media
- 🛉 Favorites
- 🔯 Stay & Play
- Y Restaurants
- Attractions
- Ja Live Music
- 🐂 Shopping
- Make a Payment
- Add-On Services
- Door Lock Information
- 🖉 What to Bring
- All Noise Ordinance
- Q Troubleshooting
- 💪 Contact Us

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

3....

Туре	Valid From	Valid To	Code
Security codes are not available until the reservation is checked-in.	-	-	





PIOIIIe +

Security Codes

Security Codes	
Display Codes on Check-in	Ves Yes
Display Codes Early (Days)	0
Display Regardless of Balance	🗋 Yes
Balance Threshold (USD)	0.00

Control when you want and who you want to display the security codes to!



Simplify the check-in and out process!

	Check-In		Check-Out		
Enable Check-in	Ves Yes	Enable Check-out	Yes		
Hide Until Check-in Time	Yes	Outstanding Item Check-Out	🕑 Yes		
Hide Until Clean	Yes				
Check-in Message	Welcome to your Track Vacation Rental! Let us know if we can be of any service during your stay.	Check-out Message	Thanks for staying with Track Vacation Rentals! Please come stay with us again soon.		
Guests ca	an self check-in through the Guest Portal		Guests can self check-out through the Guest Portal		
Hide the	self check-in until the reservation check-in	(Guests can also check-out portal items that		

time and/or until the unit status is clean

NEXT

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need to be returned still outstanding

Feature the places that you want the guests to visit during their stay!



Partner with local businesses and create deals for your guests!



Create content that will be beneficial for your guests!

Choose what your message is and who you want it to go to!

What to Bring	🖈 Add Favorite	Add-On Services We offer many additional services, please check them of	out below!	\star Add Favorite
WE'VE GOT YOU	JR HOME BASICS COVERED! rovide at the bottom of the page.	We offer a wide variety of additional services for	your stay; click on any option below to find out m	trouble
YOUR BEACH HOUSE PACK	NG LIST	Filewood	Gibbery Derivery	
KITCHEN	BATHROOM	Bike Rental 🔥	Golf Cart Rental 🛺	shooting
 Spices (including salt & pepper) Cooking oil Condiments Food supplies to dine-in Food storage items 	Shampoo Conditioner Additional toiletries	Demation Instructions on using your home's door lock. door code when your property is ready for check-in; the How to unlock & lock a Schlage B	e video below shows how to use your home's ke DE365 O A A A A A A A A A A A A A A A A A	Internet 1. Unplug the power cord from the back of the modern (don't just turn it off). If there is a separate WiFi routes it will also need to be reset. 2. Wath down and the animate or two bour back on: 3. Allow the device a minute or two bour back on: 4. No make sure you are entering the password correctly. Sometimes it can be CAPS sensitive. (Metwork and Password are located at the bottom of the cover hear of the welcame booklet) Devision 1. Is the TV saying NO SIGNAL? Sometimes the TV may be on the wrong input. Confirm the cable box is and using the TV remote, change the input unal you see the picture. Still no picture? 2. Alska unset that the consection in the back of the table box are secured and not loose. 3. The box will go through a reset function which can take up to 5 minutes to rebood. You should now see a picture. Refrigerator
NEXT		126	5) 0)	let Solutions, LLC PRIVATE AND CONFIDENTIAL

About the Guest Portal....

Can you answer these questions?

- 1. I want to allow guests to check-out and not check-in through the Guest Portal. Can I configure this in Track?
- 2. I want to feature a local business on my guest portal where anyone staying with us gets 10% off. What section do I configure this in?
- 3. Do I need to send invites to the guest portal via a link in Reservation Documents?
- 4. There are events that I want to share with my guests in the Guest Portal that I don't want to share with some of my other guests in a different area or unit. Can I do this in Track?





Creating Impactful Reservation Documents

What message do you want to convey?



What Reservation Documents do customers use?

Initial Booking Confirmation	Final Reservation Confirmation
Reservation Cancellation	Owner Notification - Booking Confirmation
Rental Agreement/Waiver	Owner Notification - Booking Cancellation
Pre-Arrival Instructions	Payment Reminder
Mid-Stay Guest Message	Payment Receipt
Guest Departure Instructions	OTA Rental Agreement/Waiver
Post Departure Email	Reservation Update
Travel Insurance Information	Additional Add-Ons to Guest Stay

What do you use?



Tip: Customize you document with Merge Fields

Confirmation Email

{{contact.first}},

Thank you for booking with Otter Oasis Rentals! Please ensure the below information is accurate:

Reservation ID: {{reservation.id}} Unit Name: {{unit.name}} Guest Name: {{contact.name}} Arrival: {{formatDate reservation.checkin "medium"}} Departure: {{formatDate reservation.checkout "medium"}}

Enable Custom Field for Merge Fields

Is Merge Field

🕑 Yes

Payment Reminder

{{contact.first}},

This is an automated reminder that tomorrow you will be charged for an upcoming reservation with us at {{unit.name}}. See your payment schedule below for more information.

{{#reservation.schedulepayments}}{{formatDate date 'medium'}}: {{formatCurrency amount currency}} {{/reservation.schedulepayments}}

lerge Fields		×
Merge Field	Description	
Agent		
{{reservation.agent.name}}	Agent Name	+
{{reservation.agent.email}}	Agent Email	+
{{reservation.agent.phone}}	Agent Phone	+
contact		
{{contact.id}}	Contact ID	+
{{contact.first}}	First Name	+
{{contact.last}}	Last Name	+



Don't forget about these when creating your documents!

Us hyperlir them t	e the link button to add iks to your document. Invite o the guest portal or to the payment portal	Use the source code button to build out extra details and styling capabilities in your document
Insert an image to your Insert an image to your Insert an image to your Insert an image to your and stand out! attractive and stand out! attractive	Insert/edit image Source Image description Dimensions x Constrain prope	X Fie ortions Cancel

Don't Forget This Step!!!

When you are ready to test and send the documents, make sure that they are saved in your unit profiles section. This is done on the Reservation tab. Most Track users put all of their documents in their company-level node to inherit down to all of their units.

General Amenities	Reservations	Security Ima	ages HK & Mair	tenance Policies	Misc
Documents					
Docum	ents Confirm	ation Email - Email	X Check-Out - Ema	ail ×	
Online Conf. L	etter Inherit				~



Now You're Ready to Send!

Manually: Within the Reservation

Document	Reservation Confirmation * *
То	× Guglielma Nevet: gnevet92@parallels.com (Primary Email)) × ✓ Cc Bc
Subject	Reservation Confirmation from Track Vacation Rentals
File • Edit • Ins	sert ▼ View ▼ Format ▼ Tools ▼
h 🖈 🖬 🖪	3 I ⊻ S <u>I</u> , ×,
reetings, Gugliel	mal
Sreetings, Guglieli Thank you for boo letails are below; Reservation Nun Property: 2Joe's I vrival Date: Tue Peparture Date: f of Nights: 1 vdults: 2 hildren: 0 lets: 0 lets: 0 letservation Tota Payments Bereli	mai king your stay with Track Vacation Rentals - we look forward to hosting you. Your reservation please be sure to visit our <u>Guest Portal</u> for helpful information about your upcoming stay. nber: 1743 Man Cave (address will be provided ahead of arrival) siday. Sep 17, 2024 Wednesday, Sep 18, 2024 i: \$0.00 wed. \$0.00

NEXT

Automatically: Triggers and/or Automations

Perform These Actions		
Action	Send Document	
То	Contact 🗙	
Doc	Reservation Confirmation	
Subject	Reservation Confirmation from Track Vacation Rentals	

Greetings, {{contact.first}}!

Thank you for booking your stay with Track Vacation Rentals - we look forward to hosting you. Your reservation details are below; please be sure to visit our <u>Guest Portal</u> for helpful information about your upcoming stay.

Reservation Number: {{reservation.id}}

After they are sent....Here is where you can see what they see!





About Reservation Documents...

Can you answer these questions?

- 1. There are 3 steps to create and use Reservation Documents in Track. Step 1 is to create the document. Step 3 is to create a Trigger/Automation to send them automatically. What is Step 2?
- 2. What are the two ways to send Reservation Documents in Track?
- 3. What are some examples of documents that you would send to a guest? An owner?
- 4. Where would you go to view a Reservation Document once it has been sent?





Improve Your Workflow with Track's Reservation Features

Batch Print Documents

Do you want to print out a document?





Step #2: In Batch Print Documents, choose the reservation based on check-in, check-out or booking, as well as start date and end date

Add Reservation Document

				Batch Print Document					
Reservation Document				battinn Document					
	Norra#			Based On		Start Date		End Date	
	Name	Print This Document Out		Check-in	~	01/23/2025	#	01/24/2025	#
	Type	latter v	Is Artive	Types		Units		Location	
	17.00		L ACUTE	Select Type	~		~	Select Location	~



Step #3: Choose the document from the dropdown list and click on the Filter button Document



Step #4: Click on one or all of the reservations. Click Print Documents

2149	Whimstay	The Loft House Estate
2159	Channel Manager	Viking Bear Lair Lakeside Condo
2226	Vrbo	Queen of the Desert

Showing 1 to 7 of 7 entries

Print Documents



Batch Print Documents Continued...



Step #5: Once completed, the Recent Document Jobs will be updated with a date and time stamp

Recent Document Jobs (Last 7 Days)							
how	25	×	rows				
ld	47		Created↓↑	Updated	Status		



Step #6: Click on the Download button to retrieve the document



Finished!

You can now download and/or print your document





Why Use Batch Print Documents?

Customers use this feature for...

Guests checking in and/or out at the front desk

Printing out documents to have physical copies for their own records

Sending important documents to guests that are not technically savvy

Having physical copies of documents for guests in case there is a loss of power or there is no ability to send them electronically

Documents to have guests review and look at while in their unit



Bulk Reservations Tool





Step #2: Use additional search options (if needed) to find the reservation(s)

More Search Options





Step #3: Click on the Search button





Step #4: Select 1 or more reservations that you wish to update or change

Reservation #	Check In 🔅	Check Out	Unit 🌩	Guest
2322	Jan 25, 2025	Feb 1, 2025	Mill Dist City Club 201	Color Test
2312	Feb 28, 2025	Mar 4, 2025	Sleek Escape - Summer	Glory Scruton
2311	Mar 2, 2025	Mar 9, 2025	426 N Eden Park Dr	Thom Oldis
2306	Feb 23, 2025	Mar 1, 2025	Canyon Moon	Goddard Brisker
2305	Feb 21, 2025	Feb 24, 2025	Sleek Escape - Summer	Oralia Adney



Bulk Reservations Tool Continued...

Step #5: Choose: Add, Change, Refresh and Remove

Click on the Continue button when finished

d			
ampaign Reserv	ation Agent	Tax Exempt	Travel Agent
ravel Insurance	Tags		
ange			
ampaign Cancel	lation Policy	Guarantee Pol	icy
eservation Agent	Reservation Ty	ype Travel A	gent
eservation Status			
fresh			
ees Rates 1	Taxes		
move			
ampaign Reserv	ation Agent	Tax Exempt	Travel Agent
ravel Insurance	Tags		
	100000000000000000000000000000000000000		

NEXT

Step #6: Fill in the fields for the actions that you wish change for the reservations selected

Click on Update Reservations when finished



Finished!



Why Use Bulk Reservations?

Customers use this feature for...

Save time by updating multiple reservations instead of having to do them individually

Ability to add, change and remove items on reservations with a simple click

Can easily search for reservations by multiple filter options

Can update reservations once prompted automatically with little to no time to wait



Block Units

Unit*	Search for a unit		Reason	Going Off Program	
			This is co	onfigured in Block Unit Reasons	Front Desk Block Unit Reasons
Step 3: Select if there this will create	e is a Clean Type Needed. a Housekeeping Work O	If there is, rder	Step 4: Add not	tes to give more deta	booked. ils about the Bloc
Clean Type	No Clean Needed		Notes		
		Step 5: Select th	ne dates for the Block to start a	and end.	
		Click (on Save Block when finished		
	Block St	tart*		E	



Block Units Continued...

Users can view the block on the Tape Chart

8 PPL	3 BR	2 BA			Checked Out	\$ C
Boulde 6 PPL	r Bay Geta 2 BR	away 2 BA	V D	Sigfrid D Chec	S Kitchen upgrade	
Canvor	Moon		V D	Manager and a state of the state	Californi	



When clicking on the block on the Tape Chart, the information about the block will appear.

Users can click on the block link and it will take them to the block unit page where they can delete, archive or edit the block.

General	Housekeeping	Audit Logs
	ID	10
	Unit	Boulder Bay Getaway
	Block Start	Jul 22, 2024
	Block End	Jul 29, 2024
	Clean Type	Spruce Clean
	Block Notes	Kitchen upgrade
	Created By	2-bwright
	Created At	Jul 24, 2024, 7:45:01 AM
	Archived At	



Why Use Block Units?

Customers use this feature for...

When a unit is going off-program and property managers want to block out dates that they no longer have the ability to sell

When a unit is not able to be sold or occupied

For unplanned or planned maintenance or emergency situations

Housekeeping-related availability block

An owner requested block

A way for property managers to block unit availability without making a reservation



Units by Owner List



Step 1: Search for the owner and unit by utilizing the filters at the top of the page. Click on Run Report when finished

Units by Owner List

Report Parameters					
Unit Select Unit	~	Owner Company Select Owner Company	~	Unit Status Active	~
Run Report Export as Ex	cel				

Step 2: A list of the unit names and owner, as well as the owner contact information will appear

Units by Owner List						
Owner	Email	Home Phone	Mobile Phone			
1908 2nd A - Bill Gibbons						
Billy Gibbons						
426 N Eden Park Dr - Tom Pettinson						
Jim Golightly	jgolightly@tnsinc.com					
Tom Pettinson	tp@tompetty.com					



Units by Owner List Continued...

General Amenities Reservat	ions Security Images HK & Maintenance Policies Misc Channels Rooms				
Name & Description				Bill Gibbons	
Name *	1908 2nd A	When elicking on		Quarterly Maintenance Program	
Unit Type *	3 BD Bronze 🗸	the unit name	When clicking on	General Contacts Un	its Recurring Charges Transactions Statements Work Orders
Short Name	1908A		the owner name	Address	
Unit Code	1908A-SMITH-ABC1	Owner		Name	Bill Gibbons
Lodging Type 🚯	Townhome 🗸	1908 2nd A	Bill Gibbons	Active Account	Yes
				Street Address	
Short Description	LOCATION! LOCATION! LOCATION! This is the perfect vacation rental in Downtown Austin! Nestled back in the hip East Cesar Chavez neighborhood, you can easily rest and recharge in	Billy Gibbons		Extended Address	
	peace during your Austin adventures. Curious about what makes Austin so weirdly wonderful?	only cloberts		Locality	Houston
Long Description	*Discourse to Thomas and Theorem and this property. This listing is far the frank house (1 house)			Region	TX
Long Description	only. The back house (other house) is rented separately to other groups of Guests. The back			Postal	
	house is not included in this rental. The pool and space in between the houses is available to			Country	US
	all Guests in both spaces. There may be interaction with other Guests outside of your private space. We ask all of our Guests to be kind and courteous to all while staving at our Property.			Email & Dhana	
	And move inside after dark. Please shoot us a message if you have interest in renting out the			Email & Phone	
The second s				Phone	
Check-In/Out				Fax	<u></u>
Timezone	Inherit (America/Chicago) 🗸 🗸			Email	
				Website	



Why Use Units by Owner List?

Customers use this feature for...

A quick search for the owner contact information

An organized report that shows owners, their units and their contact information

Can quickly navigate to the owner contact profile and the unit profile with a click of the button

Can export the owner and units into an excel spreadsheet or Google sheet



About Reservations Features...

Can you answer these questions?

- 1. I want to use Batch Print Documents. What Reservation Document type do I have to choose to be able to use this feature?
- 2. Once a block has been created on a unit, can I archive, delete or edit it before the block's end date?
- 3. When navigating to the Units by Owner List, where do the 2 links on the owner list take the user to when clicked?
- 4. When using the Bulk Reservations tool, the user can do the following actions: Add, Change, Refresh and _____?
- 5. What is one of the reasons why a Track user would use the Block Units feature?



Thank You!

Any Questions or Comments?



The Heart of Hospitality

