Booking Secretary

Our unique Booking Secretary is the ideal way to manage your booking from start through to the finish from anyway in the world. Not only does it provide a checklist of requirements but enables you to quickly create all the information your clients will require to ensure you have a successful business.

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Alerts:
This section at the top of the page provides important notifications regarding your bookings. The information provided is: number of new enquiries, number of open enquiries, current name of person staying at your property, number of clients going to your property in the next 4 weeks and number of bookings with payment overdue.

Actions:

This section is the main hub of the Booking Secretary.

Booking Enquiries

View Booking Enquires*:* Selecting this button will take you to a page displaying all your open booking enquiries. **An enquiry only becomes a booking once you have agreed all terms of the booking and the client has confirmed that they wish to proceed and book you property.**
The display shows the enquirers names, requested dates and contact information. The enquiries are ordered by enquiry date with the most recent the highest. You can e-mail the client directly by clicking on the

link.
Once you have spoken to the client and you have agreed terms for the let, you then select the “Convert to Booking” button to convert the enquiry into an actual booking.

Converting an enquiry to a booking*.* If you select “Convert to Booking” on the enquiries page next to an enquiry the system will convert the enquiry into a booking. It will bring up a screen so that you can complete all the information for the booking. If you have already completed the default information, then the additional items required to create the booking will be automatically completed. Please note that you can edit any of the information before confirming the booking at this stage. Note that after confirming the booking it will automatically update your calendar as booked

Add a Direct Booking

You can add any booking to the system, not just those generated by enquiries on worldrentalshop.com. To add a direct booking select “Add a Direct Booking” in the action section. A page will open so that you can complete all the information for the booking. If you have already completed the defaults, then the additional items required to create the booking will be automatically completed. Please note that you can edit any of the information before confirming the booking. Note that after confirming the booking it will automatically update your calendar as booked

Booking Manager

Selecting this button will take you to the individual bookings page.
This page shows every booking you have for the property in date order of arrival.
Bookings are archived after 2 months of the departure date. Archived bookings can be viewed using the link “View archived bookings”
We have created a standard set of e-mails for you to send to clients. Please note that you will have the opportunity to edit ANY of these e-mails before they are sent.
With each booking you get the following sections and actions. Note that we use a red/green traffic light system so you can visually see at what stage the booking is. You can manually override the traffic light at anytime by clicking on it, changing it to the opposite colour.

Booking Information:
In the booking information section you have the following information available.

Booking Ref: This is assigned automatically by our system and enables you to have a quick reference for your booking
Name: Name of client, below this is a link to update any of the clients personal details

Travel Dates: Arrival and departure dates of the booking. These can be edited at any time with the link on the right hand side
Rates: Price charged for the booking, booking deposit required and breakage deposit required. These can be edited at any time with the link on the right hand side
Actions: This is where you can adjust the travel dates, rates, send an e-mail to the client or cancel the booking.

Actions

1) **Booking Confirmation**
   Once you have created a booking you will want to send a confirmation of the booking to the client. Please select the link "Send Booking Confirmation" to send a booking confirmation. Selecting this link will open a 2nd page asking if you would like to attach a copy of your standard terms and conditions to the confirmation e-mail. If this is your first booking and you have not yet created/uploaded your standard terms of conditions you will have the opportunity to do this before sending the confirmation e-mail. Similarly, if you have not created your methods of payment you will also have the opportunity to create these now. Once you have sent the booking confirmation the light will turn from red to green.
2) **Deposit**
   Once you have sent the booking confirmation you will want to receive a deposit from the client. This is the commitment from the client to proceed with the booking. There is 2 parts to the deposit. Firstly is receiving the deposit and secondly is sending an invoice to the client. Once you have received the deposit from the client you manually select the traffic light to change it from red to green as a done action. If the client is taking their time sending the deposit you can send them a reminder e-mail using the link "Send Reminder". After you have received the deposit, select the link "Send invoice" to send an invoice to the client. Once you have sent the invoice to the client the light will turn from red to green.
3) **Final Payment**
   There is 2 parts to the final payment. Firstly is receiving the final payment and breakage deposit and secondly is sending an invoice to the client. It is likely that if there is a fairly large time between the booking and final payment due that you will need to remind them the payment is due. You can do this using the link "Send Reminder" Once you have received the final payment and breakage deposit from the client you manually select the traffic light to change it from red to green as a done action. After you have received the final payment, select the link "Send invoice" to send an invoice to the client. Once you have sent the invoice to the client the light will turn from red to green.
4) **Instructions**
   Now that the client has paid in full for the booking you will want to send instructions to the client. These include the direction on

how to get to the property, how they obtain a key and what they should do in an emergency. Please select the link “Send Instructions” to send the instructions by e-mail. If this is your first booking and you have not yet added the property directions, key holding instructions or emergency instructions you will have the opportunity to do this before sending the e-mail. Once you have sent the booking confirmation the light will turn from red to green.

5) **Departure**
   It is always a good idea to send a short courtesy e-mail before the client departs to the property, wishing them a goodtime. Use the link “Send farewell e-mail” to do this. Once you have sent the booking confirmation the light will turn from red to green.
6) **Return**
   There is 2 parts to the return. Firstly is sending a courtesy e-mail asking if the client had a good time and informing them you will return their breakage deposit in due course, as soon as you have received the inventory report back from the rental management company. Once you have sent the e-mail to the client the light will turn from red to green. When you have returned the breakage deposit to the client you will need to manually click the light to turn it from red to green.

Default Configuration
This section if for creating/editing you’re the default settings. It is advisable to add this information as soon as possible, although you will be prompted for the information when it is required the first time you run through the booking process.

Deposits
This is for entering your default booking deposit and breakage deposit. Enter the values in the fields using numbers only. Do not use any characters of symbols. Please select the currency of you payments.

Payments
This is for entering the information on how your clients can transfer money to you to pay for the deposits and bookings. Please select which currency you prefer to receive your payments in.
You can add up to 3 different options to pay.
3 of the most common payment methods are:

- Cheque. This is the easiest method of payment if you both live in the same country and a method that is very familiar. In the “How to use this option” box remember to include who the cheque is payable to and the full address to send the cheque to.
- Bank Transfer. This payment method can be used if both domestic and international payments and with the rise of internet banking is becoming very popular. In the “How to use this option” box remember to include the name the account is in, account number, sort code and your banks address. If you are receiving international transfers you will also need to include you IBAN

number and SWIFT BIC code. Your bank can provide you with this. Also make sure you add a note saying that the client is responsible for covering all fees and bank charges for the transfer.

- PayPal. PayPal is a popular online system of payment (in fact we use it for taking payment for this site!). You can easily open an account with PayPal to receive payments by any form of credit card or PayPal transfer. It is not a requirement for your guest to have PayPal account. For more information please visit www.paypal.com.

Booking Terms and Conditions (T & C)

Booking terms and conditions are a key part of a rental business and an essential requirement to protect yourself and your client.
You have three options for the booking T & C

1) Create a booking T & C using our template
   Note: before you create a booking T & C it is essential you read the example copy beforehand. This is identical to our template, highlighting the information that you will have to enter yourself. It is essential you read this carefully as if you choose to use our template these will be the terms and conditions you will be sending your clients from yourself.
   If there are any items that you wish to modify beyond the template, we are perfectly happy for you to copy the template to your own document, make your required changes and upload your own version.
   To create a booking T & C select the option "Create Terms and Conditions". A series of fields will be available. All information must be completed to create the T & C.
   a. Deposit: Enter the deposit amount in GBP you require when a booking is made
   b. Breakage Deposit: Enter the breakage deposit amount in GBP you require when a booking is made
   c. Full Payment: the period prior to departure you want to receive full payment
   d. Cancellation: It is normal to charge a cancellation fee in excess of the deposit as the time period to the holiday shortens. You have the option to fill the latest date in which you will charge just the deposit for cancellation and up to 3 additional time periods in which a percentage of the full payment will be charged.
      For example:
      8 weeks before departure - loss of deposit.
      6 weeks before departure **– 25%**
      4 weeks before departure - **50%**
      2 weeks before departure **– 75%**
      No show – **100%**
   e. Arrivals: Enter the earliest time of day that clients can arrive at your property.

f. Departure: Enter the latest time of day that clients can leave your property.
g. General. The last section of the T & C has a “General” title. Anything you enter here will appear in this section. You can enter anything you feel is appropriate into this section.

2) Upload your own version of booking T & C
To upload you own booking T & C please select the option “I am using my own” and then browse to your own booking T & C. You are welcome to look at our own template and use this as the basis of your own version. The file can be in any format, although we recommend using Adobe PDF or MS Word format as these are the most widely supported for your clients to be able to view.
3) Opt-out of using booking T & C (this is highly discouraged). You can select this option if you do not want to provide any booking T & C.

Directions and Key Holding:
This is divided into three sections and provides the information to your clients prior to their departure
Directions. This is the detailed direction to your apartment. Try and be comprehensive as possible and where possible highlight landmarks to give the person travelling to your property confidence they are heading in the right direction.
Key Holding. This is the instructions for your clients to obtain keys. This maybe as simple as sending them through the post or that they will be met by an on site representative.
Emergency. These are the details of who a client should contact in case of an emergency. Often owners give details in two parts. Firstly who to contact if the client has any minor problems with the property and secondly a 24hr contact number only to be used in an emergency.