



# **Vacation Rental Suite Client Curriculum**

## **“Setup”**

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Revised: 6/12/2009

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# Setup

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In the following units you will be provided with step by step directions on how to properly set up your network and browser configurations, as well as how to enter basic information into Vacation Rental Suite (VRS). This will lay the groundwork for everything you do in VRS.

## Setup includes:

- Verifying System Requirements and Settings
- Turning off Pop-Up Blockers
- Setting Internet Explorer to remember Logins & Passwords
- Adjusting Monitor Settings
- Creating an Escapia VRS Desktop Shortcut
- Logging In to VRS
- Using the Home Page
- Entering Business Contact Information
- Entering General Default Reservation Settings
- Adding a New Season
- Deleting a Season
- Editing a Season
- Adding a New Location
- Creating a New Category
- Managing Units
- Adding a New Unit
- Adding a New Contact
- Creating a New Owner Contract
- Creating a New Booking Charge Template
- Creating a New Deposit Policy

**Note:** All information in **bold** is required to move forward in VRS!

# Unit 1: Supported System Specifications and Settings

Before using VRS, it's important to make sure your computer is running the minimum supported system specifications so that VRS can operate as designed. Please download, or add any requirements prior to setting up VRS.

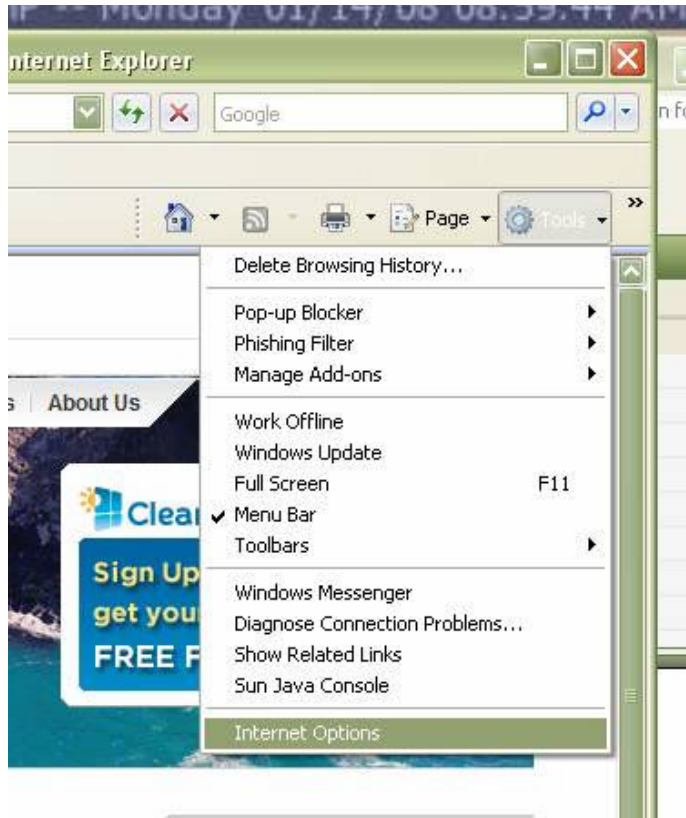
	Minimum	Recommended
<b>Processor</b>	1.2 Ghz Pentium III	3.0 Ghz Pentium 4
<b>Operating System (OS)</b>	Windows XP Home	Windows XP Professional, or Windows Vista
<b>Graphics</b>	16 bit Color	24 bit Color
<b>Resolution</b>	800 x 600	1024 x 768
<b>RAM</b>	512 MB	1GB
<b>Hard Drive</b>	10 GB Free Space	40 GB Free Space
<b>Internet</b>	DSL	Broadband
<b>Web Browser</b>	Internet Explorer 6	Internet Explorer 7, or Internet Explorer 8

**Note:** EscapiaVRS will *only* run in the Internet Explorer web browser. If you have a Mac computer, you will need to load the Windows operating system onto it so that you can download the Internet Explorer web browser.

Now that your system specifications are set, you will establish the correct internet options before logging into VRS. In order for VRS to operate as designed, Pop-Up Blockers need to allow VRS as a trusted site. To do this, you need to turn off pop-up blockers. (See the steps on how to do this on the next page.)

## Instructions for Configuring IE7 & IE8 for use with EscapiaVRS

Tools > Internet Options



Click Security tab

Click Trusted Sites (green check mark) icon

Click Sites button



**Uncheck the “Require server verification box...” check box**

Enter the following in “Add this website to the zone:” :

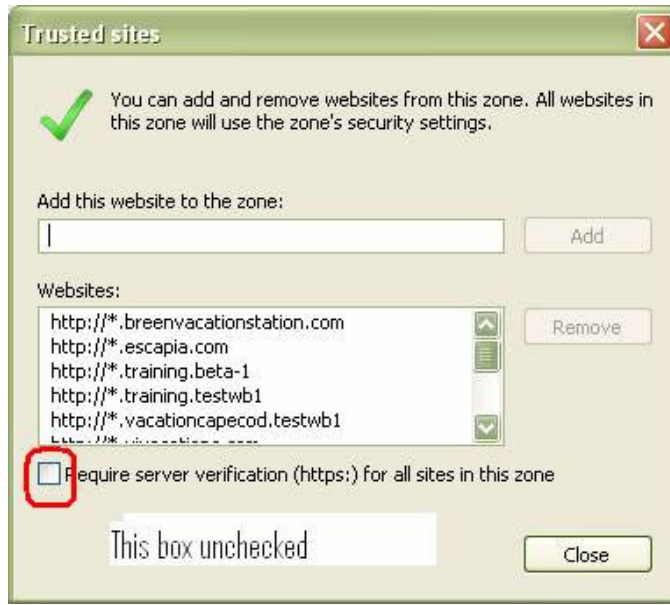
[http://\\*.escapia.com](http://*.escapia.com)

Click Add

Enter the following in “Add this website to the zone:” :

[https://\\*.escapia.com](https://*.escapia.com)

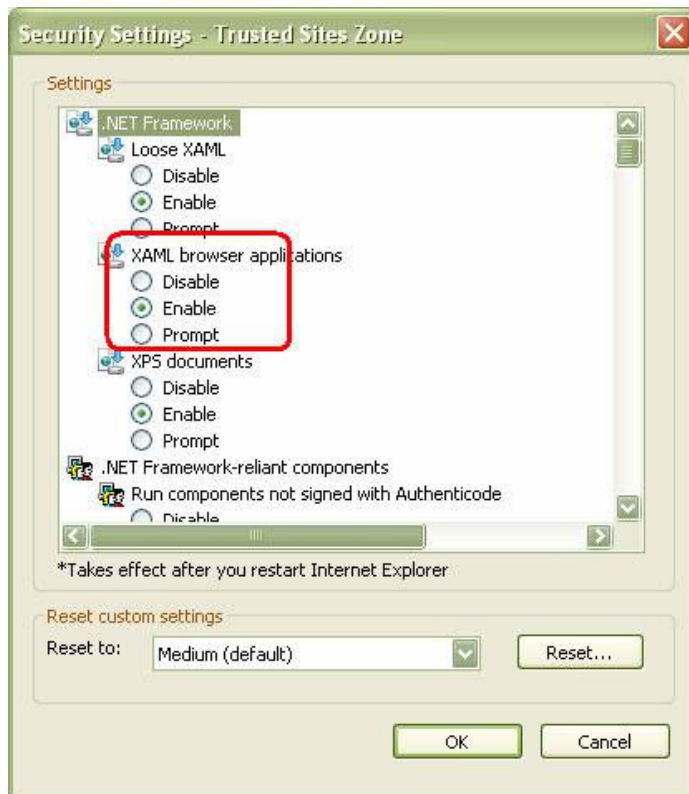
Click Close



Click Custom Level.

Any setting that has the option of Enable or Disable mark it as Enable

If there is no option of Enable then leave it as it is.



Except make Phishing Filter and Pop-up Blocker as Disable





Click on Privacy Tab

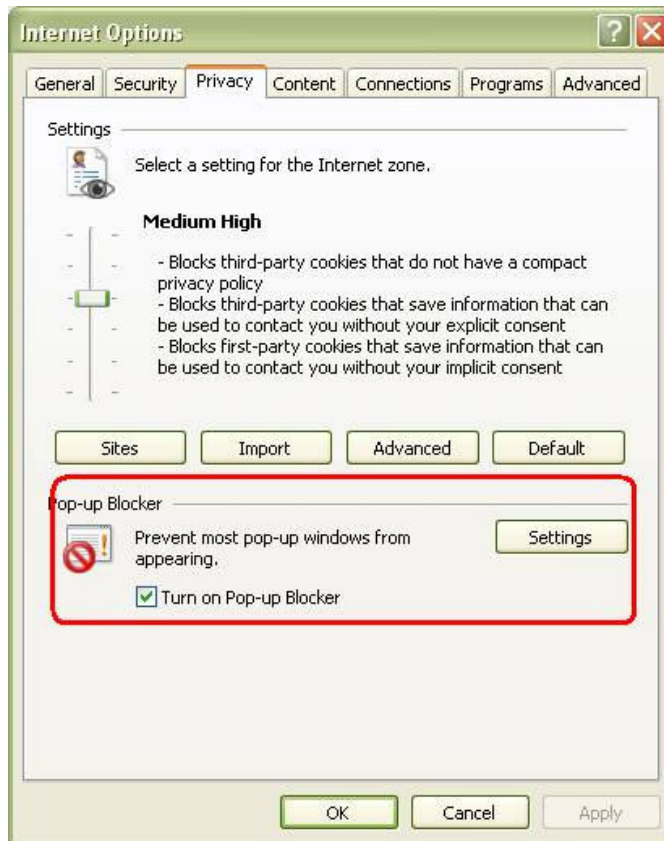
Check the box to turn on Pop-up Blocker

Click Settings

Put the following in the box "Address of website to allow:" :

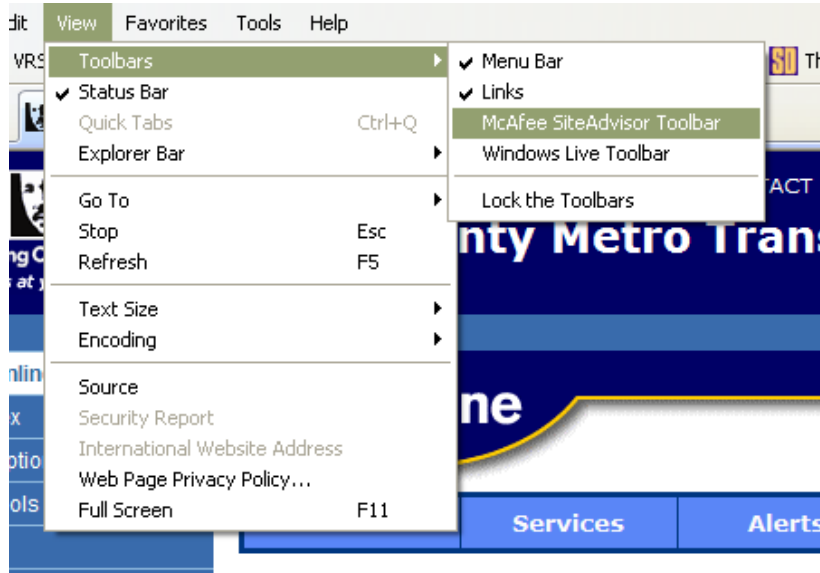
\*.escapia.com

Click Add



Click Close  
Click OK.

Uncheck any third party pop up blockers such as Google, MSN, Yahoo! in View > Toolbars



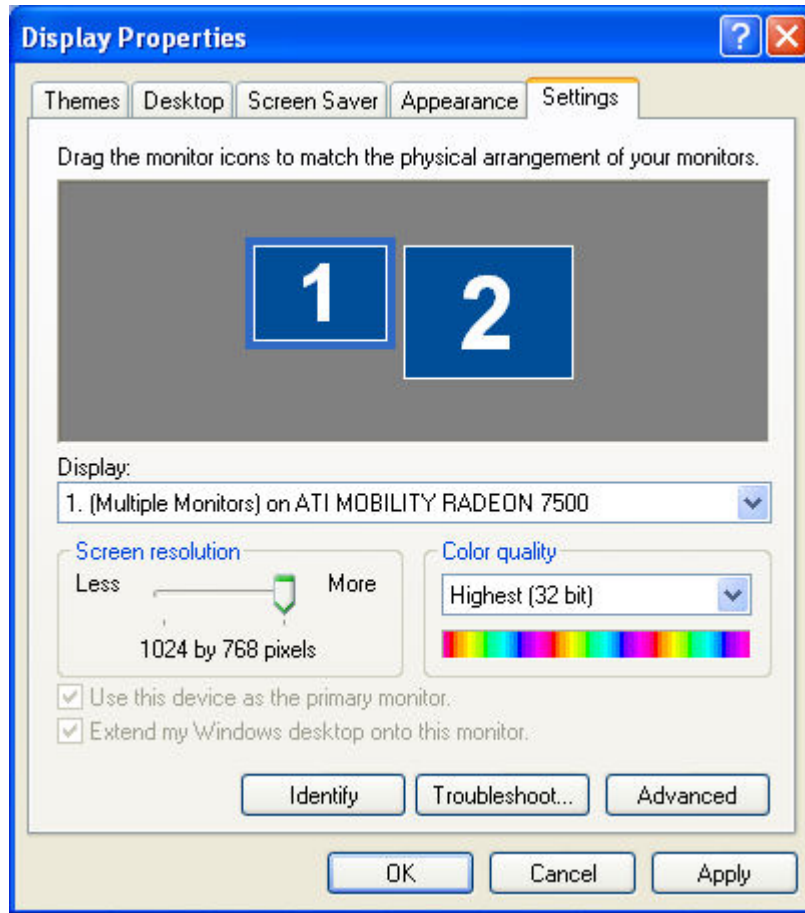
Close all IE windows and open a new one for the settings to take effect.

**Note:** if you have something called MyWebSearch installed in your browser you will need to uninstall this via the Control Panel > Add Remove Programs.

Check with your IT department for regulations on setting Internet Explorer to remember Logins and Passwords. This is not a requirement of VRS, but rather a company preference.

## Adjusting Monitor Settings

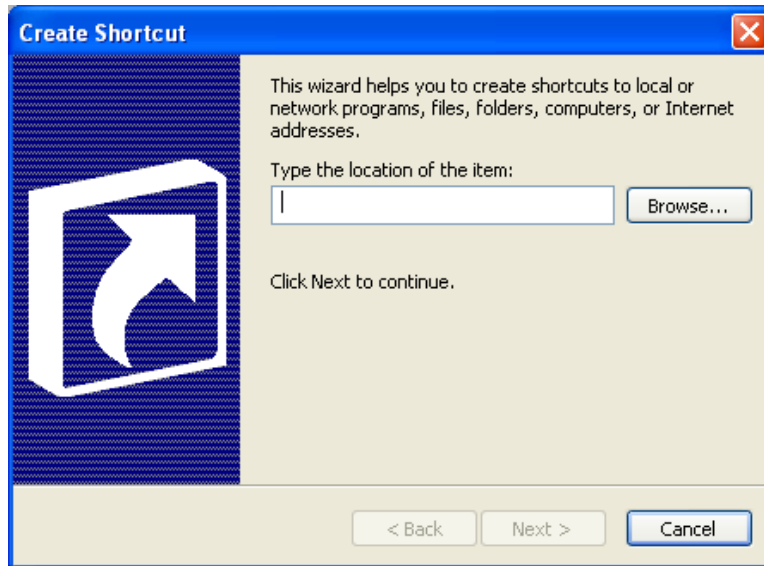
*Right Click Desktop > Properties > Settings*



- Right Click on your “Desktop”
- Go to “Properties”
- Select the “Settings” tab
- Check the screen resolution (suggested setting 1024 X 768)
- Select “Apply”
- Select “Save”

## Creating an Escapia VRS Desktop Shortcut

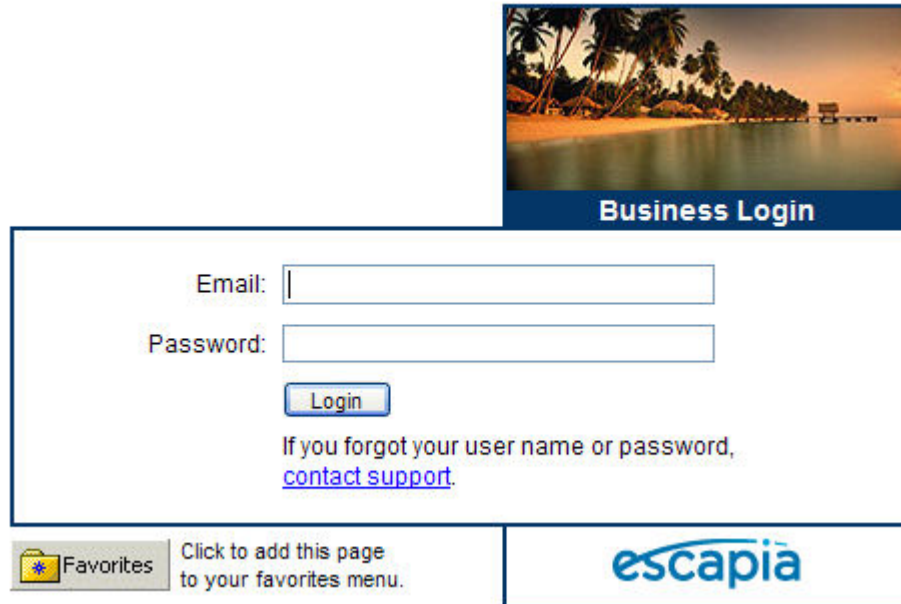
*Desktop > New > Shortcut*



- “Right Click” on your desktop
- Select “New” from the drop down list
- Select “Shortcut” from the drop down list
- Enter your VRS URL in the location window
- Select “Next”
- Name the shortcut “Escapia VRS”
- Click “Finish”

## Logging In to VRS

*Desktop > VRS Shortcut*



The image shows a screenshot of the Escapia Business Login page. At the top right, there is a small image of a tropical beach with palm trees and a sunset, with the text "Business Login" below it. The main form area contains two input fields: "Email:" and "Password:". Below the "Password:" field is a "Login" button. Underneath the button, there is a link: "If you forgot your user name or password, [contact support.](#)". At the bottom left, there is a "Favorites" button with a star icon and the text "Click to add this page to your favorites menu.". At the bottom right, there is the "escapia" logo.

- Double Click on the “Escapia VRS desktop shortcut”
- Enter “Your e-mail address”
- Enter “Your password”
- Click the “Login” button

## Unit 2: Using the VRS Home Page

The Customer Home Page represents the latest updates and news about Escapia and Vacation Rental Suite (VRS). You will navigate through this information by using Icons, Menu Tabs, and Links.



The screenshot shows the Escapia Vacation Rental Suite 7.2 interface in a Windows Internet Explorer browser. The page has a blue header with the 'escapia ONE' logo and navigation tabs for Home, Knowledge Base, Training, and Release Notes. A 'Support Account' section is visible in the top right. The main content area features a 'NEW!' icon and a press release titled 'Press Release: Escapia Names the Top Ten Vacation Rental Satisfaction Superstars' dated 6/9/09. The press release text discusses guest reviews and lists ten winning vacation rental managers. To the right of the press release is an 'EscapiaNET Terms of Use' link and a 'Get Started Today!' button. Below the press release is a 'BookDirect' advertisement and a 'Dynamic Systems checks, envelopes, 1099 forms, and other supplies.' section with an 'Order Now!' button. The footer contains a 'Trusted Site' icon and a 'Visit Blog!' button.

Notice the “Trusted Site” icon located at the bottom right of the home page window.

Using Home Page Icons (Located across the top of your Home Page)



**Reservation Grid:** The Reservation Grid provides you with an overview of the current Bookings, Holds, and Reservations. You will be able to see at a glance which units are available for rent or lease. In Chapter 2 you will learn what types of tasks you can execute from the Reservation Grid, as well as how to look up information.



**Calculator:** Available for your calculating convenience.



**Calendar:** Allows you to view bookings for past, present, and future dates.



**Find Contacts:** After selecting the Find Contacts Icon, you can search for all contacts that are currently stored in VRS, or locate a contact within a specific department. When searching for contacts, returning guests will automatically populate.



**New Contacts:** You can create a contact for a selected department, or search for a current contact that is already in VRS.



## Using Home Page Menu Tabs



There are 6 main Menu Tabs on your Home Page. Below are the main categories within each tab.

<p><b>Reservations</b></p> <ul style="list-style-type: none"> <li>• New Reservation</li> <li>• Reservation Grid</li> <li>• Reservation Grid Search</li> <li>• Find Reservation</li> <li>• Find Hold</li> <li>• Setup</li> <li>• Reports</li> </ul>	<p><b>Units</b></p> <ul style="list-style-type: none"> <li>• Units</li> <li>• Unit Groups</li> <li>• Locations</li> <li>• Pricing Plans</li> <li>• Verify Pricing</li> <li>• Classic Rates</li> <li>• Seasons</li> <li>• Owner Contracts</li> <li>• User Reviews</li> <li>• Reports</li> </ul>
<p><b>Front Desk</b></p> <ul style="list-style-type: none"> <li>• Check In Guest</li> <li>• Check Out Guest</li> <li>• Generate Booking Correspondence</li> <li>• Reports</li> </ul>	<p><b>Service</b></p> <ul style="list-style-type: none"> <li>• Service Orders</li> <li>• New Service Order</li> <li>• Reports</li> <li>• Setup</li> </ul>
<p><b>Contacts</b></p> <ul style="list-style-type: none"> <li>• Find All Contacts</li> <li>• Find Contacts by Role</li> <li>• Create New Contacts</li> <li>• Create New Contacts by Role</li> <li>• Reports</li> </ul>	<p><b>Accounting</b></p> <ul style="list-style-type: none"> <li>• Chart of Accounts</li> <li>• Journal Documents</li> <li>• Processing Booking Revenue</li> <li>• Manage Batches</li> <li>• Accounts Receivable</li> <li>• Accounts Payable</li> <li>• Banking</li> <li>• Statements</li> <li>• Set-Up</li> <li>• Reports</li> </ul>
<p><b>Housekeeping</b></p> <ul style="list-style-type: none"> <li>• Mangle Housekeeping</li> </ul>	<p><b>Administration</b></p> <ul style="list-style-type: none"> <li>• Set-Up</li> </ul>

• Reports	• Reports
-----------	-----------

## Customer Home information and Updates



In the main section of the customer home you will find valuable information about your VRS. Some of the things you will see in this section are:

**Notifications & Updates:** Information regarding new features, upcoming releases, new partner announcements, events, and programs. Be sure to check back here often as the homepage is updated multiple times through the week.

**Knowledge Base:** Search or browse through our knowledge base full of “how to” and troubleshooting articles.

**Training:** View training videos, read through training curriculum and FAQs (Frequently Asked Questions), as well as view the training schedule and log in to training classes.

**Release Notes:** View the features and fixes that were included in past releases.

## Unit 3: VRS Default Information

### Entering Business Contact Information

[Admin](#) > [Setup](#) > [Business](#)

The screenshot shows the 'Business' setup form in the Escapia Vacation Rental Suite 7.2. The form is titled 'Business (Account Code: DemoVR)' and is located in the 'Admin' section of the application. The form contains the following fields and options:

- Company Name:** Hawaii Homes
- Company Slogan:** Unforgettable Vacation Home Rentals
- Primary e-mail:** support@escapia.com
- Secondary e-mail:** emoraleja@escapia.com
- Phone Numbers:** Three phone number fields, each with a dropdown menu set to 'Business' and a checked 'U.S. number' checkbox. The first number is +1 (800) 372-2742, the second is +1 (206) 686-6860, and the third is empty.
- Physical Address:** Address Line 1: 2270 Kalakaua Blvd; Address Line 2: (empty); City: Honolulu; State/Province/Region: HI; ZIP/Postal Code: 96815; Country: United States.
- Mailing Address:** A checked checkbox labeled 'Same as physical address'.
- Time Zone:** (GMT -08:00) Pacific Time; Adjust for Daylight Savings Time: checked.

Buttons for 'Cancel' and 'Save' are located at the bottom of the form.

- Enter your “Company Name”
- Enter your “Company Slogan”
- Enter your “Primary Email” address
- Enter your “Phone Number(s)”
- Enter your “Address”
- Select “Save”

The information in **bold** is required to move forward in VRS. When entering your company email, make sure to use an address that is checked frequently, as your online reservation hold alerts will be sent there.

#### **Please Note:**

This information tied directly to Web Portal Contact Us information. Changes made in this section will appear on the Portal site.

## Entering General Default Reservation Settings

[Reservations > Setup > Reservations](#)

### Bookings:

- Select “Use ‘Advanced’ Pricing Engine (*The ability to select either ‘Classic’ or ‘Advanced’ Pricing is for clients that were implemented prior to the Advanced Rate Engine being available.*)
- Select the “Weekly Rate Divisor”
- Select the “Monthly Rate Divisor”
- Select Weekly & Monthly Thresholds
- Select Step Rate Thresholds if applicable

### Restrictions:

- Select the Cat, Dog, or Smoking restrictions if any

### Front Desk:

- Enter the Default “Check-In Time”
- Enter the Default “Check-Out Time”

### Online Reservations & Availability:

- Select the minimum nights required for a guest to make a reservation on line.
- Select the default sort order that units will be sorted by on your website

### Miscellaneous:

- Put a checkmark in the miscellaneous box if you require your reservationists to take payment information when creating a reservation.

If this is selected, the reservationists will not be able to complete the reservation process without out obtaining the payment information.

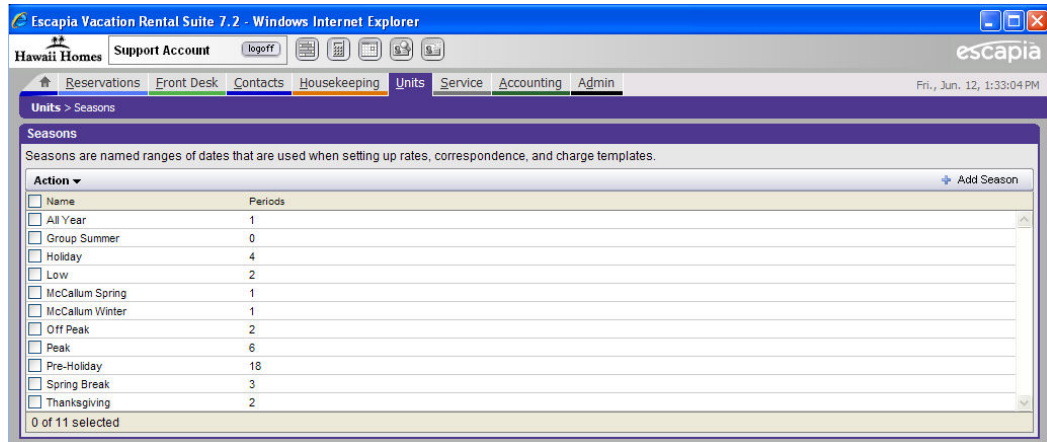
- Select “Save”

The information you’ve enter in the General Reservations Setup window will affect all the units in VRS. You have the option to change the reservation settings for a specific unit in the “Unit Details” screen located at (*Admin > Setup > Unit > Unit Details*).

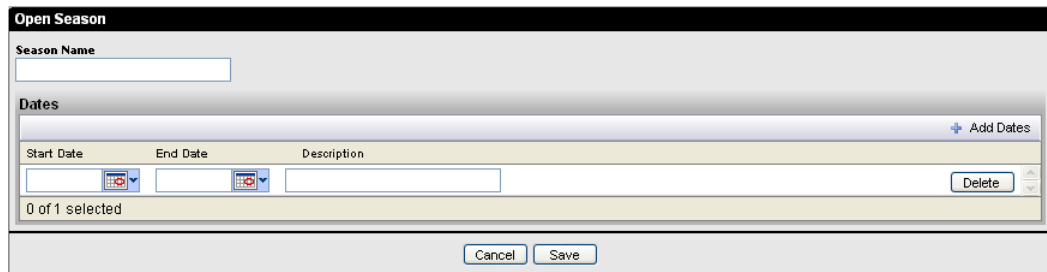
# Unit 4: VRS Tasks

## Adding a New Season

[Admin > Setup > Seasons or Units > Seasons](#)



Setting up “Seasons” is one of the first steps in establishing your rates. Seasons will regulate what rates apply in a specific season. In the seasons window you will see a list of established seasons. To add a new season, select the “Add Season” button on the right side of the window.



From the “Open Season” window you will need to enter the following information.

- Enter the “Season Name”
- Select the “Add Dates” button on the right of the window
- Select the “Start Date”
- Select the “End Date”
- Enter the “Description”
- Select “Save”

## To Delete a Season

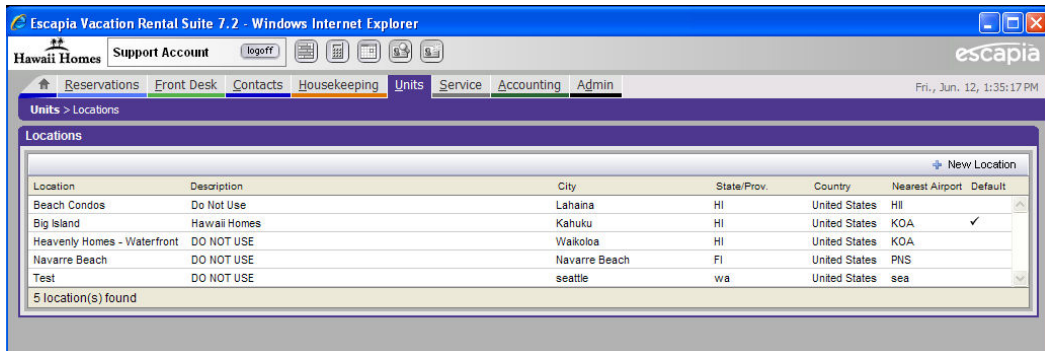
- From the “Seasons” window, put a checkmark in the box next to the desired season
- Click on the **bold** “Action” pull down bar
- Select “Delete”

## To Edit a Season

- Highlight the desired season with your mouse and click
- Make the changes
- Select “Save”

## Adding a New Location

[Admin](#) > [Setup](#) > [Locations or Units](#) > [Locations](#)



A location can be described as the company or agency name. There should be only one location in the “Locations” window above at all times. This is usually established for you by Escapia. For the location (company or agency), you have the option to establish three “Categories” which are searchable by your customers via the internet. Within each of the three categories, you can create as many “Options” as you need to describe each of the categories.

## Creating a New Category

[Admin](#) > [Set-Up](#) > [Locations](#)

From the “Locations” window above, click on the “New Location” button on the right.

**Open Location**

Location Name:  Description:

City:  State/Province/Region:  Country:

Nearest Airport (code):   Default Location

Categories:

Buttons: Move Up, Move Dn, Open, Cancel, Save

For each category you can describe specific characteristics or features of the property or area. All three categories are searchable in the VRS Reservation Grid, in the VRS Manage Unit Screen, and on your Escapia consumer/portal website. The key to creating categories is to keep it simple. The following is an example of how to effectively use categories and options.

Category 1 = Area  
Option: West Beach

Option: North Shore  
Option: East Ridge

Category 2 = View

Option: Water  
Option: Mountains  
Option: City

Category 3 = Hot Tub/Pool

Option: Hot Tub Yes  
Option: Pool Yes  
Option: None

Each category and option that you create will be unique to your business needs.

- Click on the ADMIN tab
- Click on the SETUP menu
- Select the LOCATIONS option
- Click on the DEFAULT LOCATION record to view its settings
- In the OPEN LOCATION screen, on the right side are three CATEGORIES
- Double click on any of them to open the category and change its settings

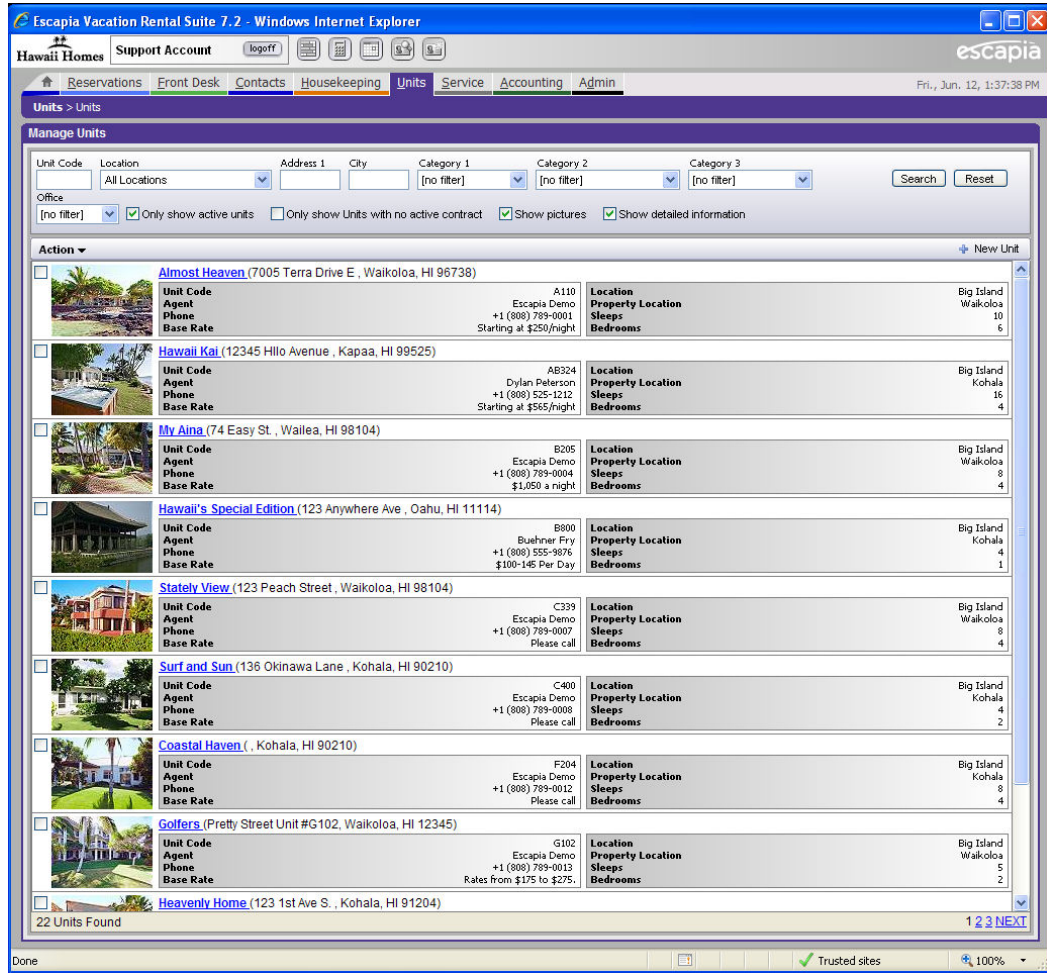
Action	Description
<input type="checkbox"/> Text	
<input type="checkbox"/> Mountain	
<input type="checkbox"/> Beach	
<input type="checkbox"/> Wine Country	

- In the CATEGORY NAME field - Enter a Category Name
- In the DESCRIPTION field – enter a description of the category if needed
  - If the category name is self explanatory and does not need further elaboration – leave the field blank
- Click the SAVE button to save the name information
- Double click on the category again to make option setting changes
- To add an option – click the NEW OPTION button
- In the OPTION TEXT field - Enter an Option
- In the DESCRIPTION field – enter a description of the option if needed
  - If the option text is self explanatory and does not need further elaboration – leave the field blank
- Click the SAVE button to save the Option information
- Click the SAVE button to save the Category Information
- Click the Save button to save the LOCATION changes



# Managing Units

## Units Tab



When adding a New Unit, the first window you will see is the “Manage Units” window. Here you can view unit information at a glance, as well as search for units based on the locations or categories you have selected in the search section at the top of the window. When you move your mouse from one property to the next, you will notice the property will be highlighted and ready for selection. You can go directly to unit information by clicking on the property picture. By clicking on the blue hyperlink to the right of the picture you can view the unit information as it is seen on the website.

If you have multiple property pages, you will see the word “NEXT” located at the bottom right for selection. You can go to a specific page number by clicking on the desired number.

- Click on the ADMIN button
- Click on the SETUP menu
- Click the UNITS option

## Adding a New Unit

There are five (5) steps to adding a new unit. To add a new unit, click on the “New Unit” button on the top right side of the “Manage Units” window. This will open the “New Unit Wizard” – Step 1 of 5.

### Step 1

The screenshot shows the 'New Unit Wizard - Step 1 of 5' interface. The 'Information' section contains the following fields: Unit Code, Friendly Unit Name, Rental Agent (with a dropdown for 'Default Housekeeper'), Account Support (with a dropdown for 'unspecified'), Marketing Headline (less than 77 characters), Short Description (less than 256 characters), Long Description (less than 4096 characters), and Driving Directions. The 'Location' section contains: Location (dropdown), Office (dropdown for 'Main Office'), Tax District (dropdown for 'Hawaii'), Address Line 1, Address Line 2, City, State/Province/Region, ZIP/Postal Code, Country (dropdown for 'United States'), Latitude, Longitude, Unit Phone - Line 1 (with a checked 'U.S. number' checkbox), and Unit Phone - Line 2 (with a checked 'U.S. number' checkbox). At the bottom of the form are 'cancel' and 'next >' buttons.

- Enter the “Unit Code”
- Enter the “Friendly Unit Name” (Seen on customer correspondence)
- Enter the “Marketing Headline” (This will appear on EscapiaNET partner sites if you participate in EscapiaNET. Ex: *Gorgeous beach front home with hot tub and bay windows.*)
- Enter the “Location” of the Unit
- Enter the “Office”
- Enter the “Tax District”
- Enter the “City, State, Zip”
- Enter the “County”
- Enter the “Unit Phone”
- Select “Next”

Like always, the more information you enter into VRS, the better it will be for your correspondence and records. Although the “Short & Long Descriptions” are not in bold, it would benefit you to enter them, as the “Short Description” will be seen in “Unit Information” in the “Location” tab, and the “Long Description” will be seen in the unit description on the website.

## Step 2

In Step 2 you will enter the specific details about the unit such as number of bedrooms, bathrooms, etc.

- Select the number of “Bedrooms”
- Select the number of “Lofts” if applicable
- Select the number of “Bathrooms”
- Enter the “Maximum Occupancy” allowed for the unit
- Select the three appropriate “Categories”
- Select “Next”

The categories that you select in this window were created when you set up “Units & Locations” (*Admin > Setup > Locations or Units > Locations*). You will need to set up the categories before entering units so that they can be selected and you can move forward in VRS. The “Utility Account” fields allow you enter account numbers and contact information. The “Custom Fields” can be used as you like.

### Step 3

New Unit Wizard - Step 3 of 5 (Unit zzzz)

Rates

Display Rate

Policies

Check-In Time: 4:00 PM Inherit from Business

Check-Out Time: 11:00 AM Inherit from Business

Smoking Allowed: No Inherit from Business

Cats Allowed: No Inherit from Business

Dogs Allowed: No Inherit from Business

Display Address to the web: No Inherit From Business

Allow Confirmed Booking from EVRN: No Inherit From Business

Exclude this unit from the Reservation Grid

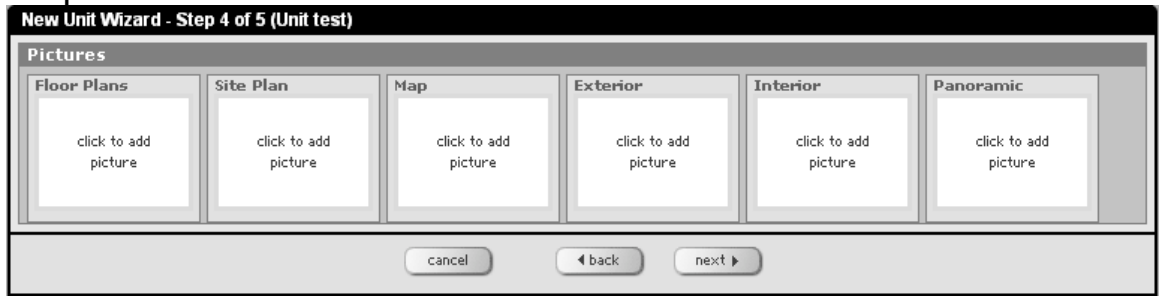
cancel < back next >

- Enter the unit “Display Rate” (Visible to the customer)
- Verify the settings in the “Policy” section

The “Inherit from Business” policies come from the “General Default Reservation Settings” located at (*Reservations > Setup > Reservations*). To change a default policy, do the following:

- Click on the “Inherit from Business” drop down menu
- Select “Use This Entry”
- Change the policy to the desired state
- Click on the “Save” button on the bottom of the window
- Click on the “Next”

## Step 4

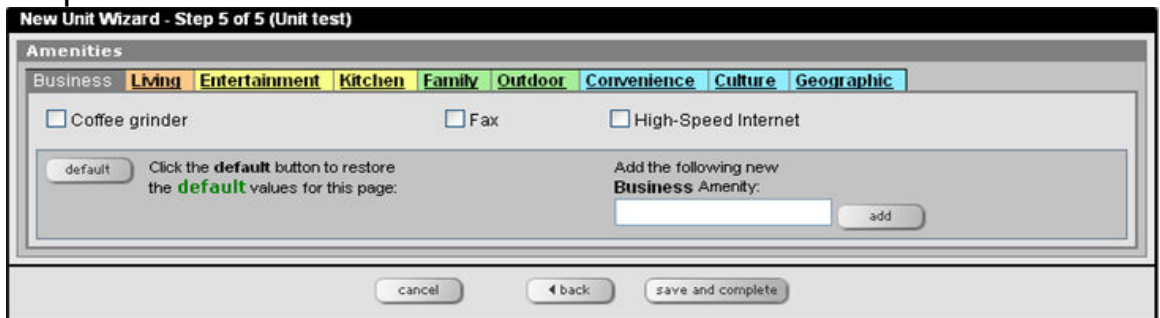


In Step 4 you will see six (6) types of picture box's, such as Floor Plans, Exterior, etc. This does not limit you to having only six (6) pictures. You can upload as many pictures as you'd like, as long as you upload them in the correct box. To upload a picture, do the following:

- Click on the box that correlates to the type of picture you're uploading
- Click on the "Browse" button and located the desired picture
- Click on the "Upload" button
- Type in the "Picture Name" if desired
- Select the picture "Display Order" if you've loaded multiple pictures for one type
- Type a "Picture Description" if desired
- Click on the "Save" button located under the picture description box
- Click on the "Save" button at the bottom of the window

You can select which picture you'd like your customers to see as the primary photo when they select a picture type from the web site. The remaining pictures will remain as thumbnails until they are clicked on, at which time they will become larger for viewing. The "Exterior" picture will be the primary picture used in the "Manage Units" window. When loading pictures, it is recommended that the picture is no larger than 100KB and in JPG form. Avoid saving pictures in bitmap form because they are too large and can provide VRS challenges within your site. To help speed up the process of loading pictures, it's recommended that you have your property pictures pre sized and saved in a folder. Once the pictures have been loaded, you're ready to select the Amenities for the unit.

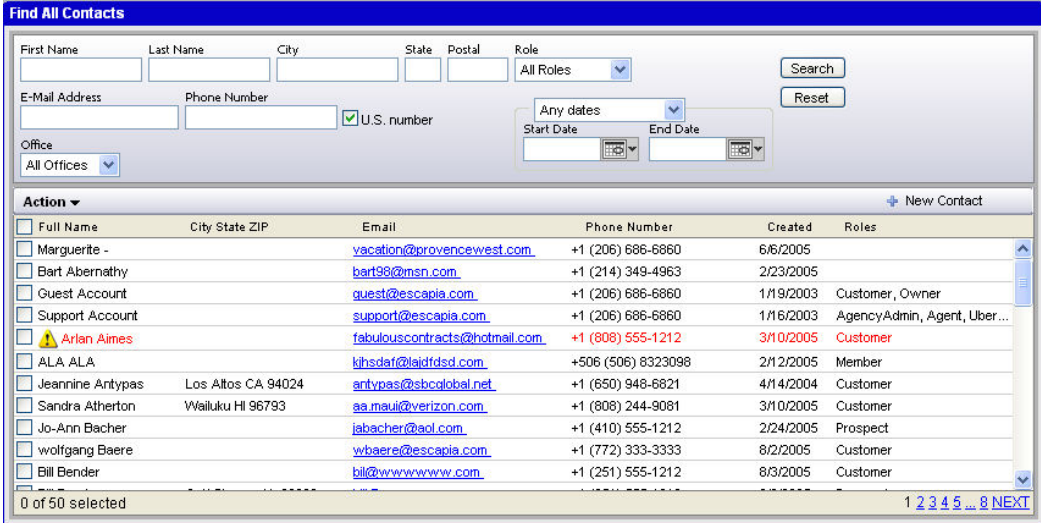
## Step 5



Amenities are for description purposes and are currently not searchable via the web site. Selecting the appropriate amenities for each unit will allow reservationists to search for units based on these selections when making a reservation. The Amenities you select are seen on the units web page, as well as in customer correspondence.

## Adding a New Contact

**Find Contacts ICON > All Contacts** 



Full Name	City State ZIP	Email	Phone Number	Created	Roles
Marguerite -		<a href="mailto:vacation@providencewest.com">vacation@providencewest.com</a>	+1 (206) 686-6860	6/6/2005	
Bart Abernathy		<a href="mailto:bart98@msn.com">bart98@msn.com</a>	+1 (214) 349-4963	2/23/2005	
Guest Account		<a href="mailto:guest@escapia.com">guest@escapia.com</a>	+1 (206) 686-6860	1/19/2003	Customer, Owner
Support Account		<a href="mailto:support@escapia.com">support@escapia.com</a>	+1 (206) 686-6860	1/16/2003	AgencyAdmin, Agent, Uber...
<b>Arlan Aimes</b>		<a href="mailto:fabulouscontracts@hotmail.com">fabulouscontracts@hotmail.com</a>	<b>+1 (808) 555-1212</b>	<b>3/10/2005</b>	<b>Customer</b>
ALA ALA		<a href="mailto:khsdat@laidfrsd.com">khsdat@laidfrsd.com</a>	+506 (506) 8323098	2/12/2005	Member
Jeannine Antypas	Los Altos CA 94024	<a href="mailto:antypas@sbglobal.net">antypas@sbglobal.net</a>	+1 (650) 948-6821	4/14/2004	Customer
Sandra Atherton	Wailuku HI 96793	<a href="mailto:aa_maul@verizon.com">aa_maul@verizon.com</a>	+1 (808) 244-9081	3/10/2005	Customer
Jo-Ann Bacher		<a href="mailto:jabacher@aol.com">jabacher@aol.com</a>	+1 (410) 555-1212	2/24/2005	Prospect
wolfgang Baere		<a href="mailto:wbaere@escapia.com">wbaere@escapia.com</a>	+1 (772) 333-3333	8/2/2005	Customer
Bill Bender		<a href="mailto:bill@wwwwww.com">bill@wwwwww.com</a>	+1 (251) 555-1212	8/3/2005	Customer

When adding a New Contact, you'll want to make sure the contact is not currently in the VRS database. This will eliminate repetition and expedite your processes. From the "Find All Contacts" window do the following:

- Enter "First Name"
- Enter "Last Name"
- Select "Search"

The search filter on the top of the window allows you to search by using filters such as a phone number, date range, role, and etc. If there is more than one page of contacts you will see "NEXT" on the bottom right of the window. If the name submitted has a match, the database will alert you of the possible match. You may also get an alert if your customer has been blacklisted. There are two steps to entering a new contact. The first step is to select the customer in the list below (if they are in the VRS database), or select the "New" button on the bottom right of the screen to move forward.



Contact Name	Type	E-mail	ZIP Code	Phone Number
zzESCAPIA, zzOwner	Owner	<a href="mailto:zowner@escapia.com">zowner@escapia.com</a>		+1 (206) 849-4848

After selecting the “New” button, you will be taken to the screen below where you will enter the customer contact information. The more customer contact information you enter, the richer your customer correspondence can be.

**New Contact Wizard - Step 2 of 2**

**Contact Details**

**Contact Name**

Title First M. Last Suffix

Primary e-mail

Secondary e-mail

**Phone Numbers**

Home  U.S. number

Business  U.S. number

Mobile  U.S. number

Fax  U.S. number

Office

Unspecified

**Contact Mailing Address**

Company

Address Line 1

Address Line 2

City State/Province/Region

ZIP/Postal Code

**Country**

United States

Contact is on our Mailing List

Contact has rented here in the past

Contact is on our Customer Blacklist

Import Code

Notes

cancel back save and complete

- Verify the “Contact Name”
- Enter the customers “Primary e-mail address”
- Enter the customers “Phone Number(s)”
- Enter the customers “Contact Mailing Address”
- Capture any additional information you can
- Select “Save and Complete”

# Creating a New Owner Contract

[Accounting](#) > [Setup](#) > [Owner Contracts or Units](#) > [Owner Contracts](#)

Contract	Type	Contract Dates	Status	Unit(s)	Owner(s)
<input type="radio"/> CNR-00000	STE	1/1/2004 - 2/14/2007	Active	D304	Dan Rather
<input type="radio"/> CNR-00001	STE	1/1/2004 - 4/30/2012	Active	EEE105	Dan Rather , Meg Ryan
<input type="radio"/> CNR-00002	STE	1/1/2004 - 12/31/2010	Active	E201	Robert De Niro
<input type="radio"/> CNR-00003	STE	1/1/2004 - 12/31/2010	Active	ABC , G102	Britney Spears
<input type="radio"/> CNR-00004	STE	1/1/2004 - 12/31/2010	Active	G205	Joe Pesci
<input type="radio"/> CNR-00005	STE	1/1/2004 - 2/8/2007	Active	A229	Julia Roberts
<input type="radio"/> CNR-00006	STE	1/1/2004 - 12/31/2010	Active	K263	Meryl Streep
<input type="radio"/> CNR-00007	STE	1/1/2004 - 12/31/2010	Active	B205	Harrison Ford
<input type="radio"/> CNR-00008	STE	1/1/2004 - 12/31/2010	Active	C339	Jimmy Stewart
<input type="radio"/> CNR-00009	STE	1/1/2004 - 12/31/2010	Active	R119	George Clooney , Harrison Ford
<input type="radio"/> CNR-00010	STE	1/1/2004 - 12/31/2010	Active	L200	Jennifer Lopez
<input type="radio"/> CNR-00011	STE	1/1/2004 - 12/31/2010	Active	M660	Dick Clark
<input type="radio"/> CNR-00012	STE	1/1/2004 - 12/31/2010	Active	H339	Albert Einstein
<input type="radio"/> CNR-00013	STE	1/1/2004 - 12/31/2010	Active	N881	Brad Pitt
<input type="radio"/> CNR-00014	STE	1/1/2004 - 12/31/2010	Active	G663	Mei Gibson
<input type="radio"/> CNR-00015	STE	1/1/2004 - 12/31/2010	Active	M126	Bill Gates
<input type="radio"/> CNR-00016	STE	1/1/2004 - 10/31/2010	Active	C305	Sean Connery
<input type="radio"/> CNR-00017	STE	1/1/2004 - 12/31/2010	Active	C206	Sylvester Stallone
<input type="radio"/> CNR-00018	STE	1/1/2004 - 12/31/2010	Active	B104	Jamie Lee Curtis
<input type="radio"/> CNR-00019	STE	9/1/2005 - 12/31/2010	Active	L220 , ms_001	Homer Simpson
<input type="radio"/> CNR-00020	STE	1/1/2004 - 12/31/2010	Active	T467	Steve Martin
<input type="radio"/> CNR-00021	STE	1/1/2004 - 12/31/2010	Active	K603	Albert Einstein , Jack Nicklaus
<input type="radio"/> CNR-00022	STE	1/1/2004 - 12/31/2010	Active	F204	Ed McMahon
<input type="radio"/> CNR-00023	STE	1/1/2004 - 5/1/2008	Active	M441	Bette Midler
<input type="radio"/> CNR-00024	STE	1/1/2004 - 12/31/2010	Active	C400	John Volta

At the top of the Owner Contracts window above you have the option to search for contracts that are currently in VRS by using filters. If you want to delete a contract, select the appropriate radio button next to the desired contract, click on the **bold** "Action" menu bar and select "Delete". If there is more than one page of contracts you will see "NEXT" at the bottom right of the window. To create a new contract, select the "New Contract" button on the right side of the window. This will take you to the New Contract Wizard – Step 1 of 3.

## Step 1

**New Contract Wizard - Step 1 of 3**

**Contract and rental dates**

**Contract Type**: Short Term Exclusive

**Contract Start Date**: [Date Picker]

**Contract End Date**: [Date Picker]

**Rental Start Date**: [Date Picker]

**Rental End Date**: [Date Picker]

cancel next ▶

- Select the "Contract Type"
- Enter the "Contract Start Date"
- Enter the "Contract End Date"
- Select "Next"



The Rental Start Date and Rental End Date are used when promotional rates are being used for the reservation. This will designate what time frame the promotion was offered and when it can be used.

## Step 2

In Step 2 you will combine the Unit(s) and the Owner(s) in the contract.

- Select the “Add Unit to Contract” button on the right
- Put a checkmark in the box next to the desired “Unit” or Units that you want to connect to the Owner Contract.
- Select the “Add Selected Units” button
- Select the “Add Owner to Contract” button
- Put a checkmark in the box next to the desired “Owner” or Owners that you want to connect to the Owner Contract.
- Select the “Add Selected Owners” button

Unit Code	Location	Address	Status
LT101	Big Island	Kona HI 99999	Inactive
B111	Big Island	202 Liberty Sreet Molokai HI 98110	Inactive

Name	Percentage Ownership	Primary Financial Owner	Hold Payments
George Clooney	50 / 0 / 1 %	<input type="radio"/>	<input type="checkbox"/>
Humphrey Bogart	50 / 0 / 1 %	<input type="radio"/>	<input type="checkbox"/>

Financial Ownership Shared Equally

If you have selected multiple owners, you will not have the option to select the “Percentage of Ownership” for each owner.

- Select “Percentage Ownership” if there is more than one Owner on the contract
- Select the “Next” button

### Step 3

Next you will create the “Charge Templates” for the contract. Charge Templates need to be created before you attempt to create an Owner Contract because you’ll need to select them in Step 3.

- Click on “New Contract Charge Template” button on the right of the window in Step 3 to select the appropriate Charge Template information for the Owner Contract.

- Type in the “Charge Name” (Displayed on the Owner Statement)
- Select the “Customer Type”
- Select the “Cancellation” option
- Enter the “Minimum & Maximum” number of nights
- Enter the “Effective Start Date”
- Enter the “Effective End Date”
- Enter the “Amount”
- Select the “Calculation Method”
- Select the “Journal Document Template”
- Select the “Posting Period”
- Click “Save”
- Click “Save & Complete”

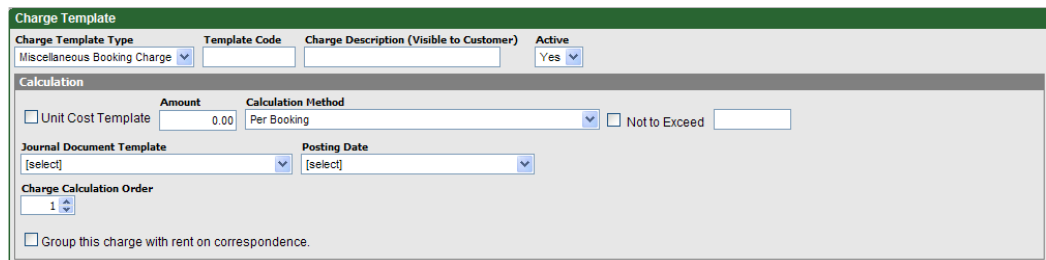
## Creating a New Booking Charge Template

### [Accounting](#) > [Set Up](#) > [Charge Templates](#)

After selecting the “New Charge Template” button on the right side of the Charge Template window you will be able to create a new Booking Charge Template.

- Select the “Charge Template Type”
- Enter the “Template Code”
- Enter the “Charge Description” (Visible to Customer)
- Make sure the Charge Template is set as “Active”

## Calculation



The screenshot shows the 'Charge Template' window with the following fields and options:

- Charge Template Type:** Miscellaneous Booking Charge (dropdown)
- Template Code:** (text input)
- Charge Description (Visible to Customer):** (text input)
- Active:** Yes (dropdown)
- Calculation Section:**
  - Unit Cost Template
  - Amount:** 0.00 (text input)
  - Calculation Method:** Per Booking (dropdown)
  - Not to Exceed (checkbox)
  - Journal Document Template:** [select] (dropdown)
  - Posting Date:** [select] (dropdown)
  - Charge Calculation Order:** 1 (dropdown)
  - Group this charge with rent on correspondence.

- Enter the “Amount”
- Select the “Calculation Method”
- Put a checkmark in the “Not to Exceed” box and enter an amount if needed
- Select the “Journal Document Template”
- Select the “Posting Date”
- Select the “Charge Calculation Order” if desired

When using the Charge Calculation Order, you are selecting the order in which charges will be calculated in a contract. By putting a checkmark in the box next to “Group this charge with rent on correspondence” you can combine (roll up) additional charges into rent for a total on the customer correspondence. In VRS all booking charges will be itemized for you.

## Application

The screenshot shows the 'Application' form with the following details:

- Scope:** Business (dropdown)
- Auto-Apply:** Yes (dropdown)
- Apply to Specific Dates:** (dropdown)
- Effective Start Date:** 01/01/2009 (calendar)
- Effective End Date:** (calendar)
- Quote Start Date:** (calendar)
- Quote End Date:** (calendar)
- Include this charge amount in deposit:** (checkbox)
- Include taxes on this charge in deposit:** (checkbox) (Can also be used to include taxes when this charge is included in deposits via Deposit Template setup)
- Reservation Type:** Renter (dropdown)
- Upon Cancellation:** Keep (dropdown)
- Apply this charge to bookings with a minimum stay of:** (dropdown) day(s) and a maximum stay of (dropdown) days.

- Select business as the “Scope” (if you want the template to be available for all Units)
- Select “Auto Apply” yes if needed (This will default to “No”)
- Select the “Reservation Type”
- Select “Cancellation” policy
- Enter the “Effective Start Date”
- Enter the “Minimum & Maximum” nights if needed
- You can also choose whether or not to include the charge amount in deposit and whether or not to include taxes on the charge in deposit

## Tax

The screenshot shows the 'Taxation' form with the following details:

- This charge is taxable:** (checkbox)
- Buttons:** Cancel, Save

If the Charge Template you’re creating will be taxable, place a checkmark in the box next to “This charge is taxable” and select the appropriate options.

Click “Save”

## Adding a New Rate Rule

To learn how to set up Rate Rules and Pricing Plans, see the Advanced Rate Engine Curriculum on the Training tab of the Homepage.

## Creating a New Deposit Policy

[Accounting](#) > [Set Up](#) > [Deposit Policies](#)

In the Deposit Policy window you will see a list of current policies. You can search for a specific policy by using filters, or delete a policy by putting a checkmark next to the desired policy and select “Delete” from the **bold** “Action” pull down menu. To create a new policy, select the “New Deposit Policy” button on the top right of the window.

**Open Deposit Policy**

**Deposit Policy Name** **Effective Date** **Scope**

Business

**Customer Type(s)** Cancellation Policy

Renter  Owner  Guest of Owner  Owner Referral

Apply this policy to bookings that start from  to  days after entry.

**Deposit Templates**

**Action**

<input type="checkbox"/>	Deposit Name	Type	Amount Due Calculation	Due Date Calculation	Refund Date Calculation
No templates are currently defined for this policy.					

0 of 0 selected

- Enter the “Deposit Name”
- Select the “Effective Date”
- Select the “Scope”
- Choose the “Customer Type (You can choose multiple types by holding down the “Ctrl” key and selecting them)
- Enter your “Cancellation Policy” text if needed
- Enter the policy booking “Start and End Date”
- Click on the “New Deposit Template” button

**Open Deposit Template**

Deposit Name:   
 Deposit Type:   
 Document Template:   
 Cancellation Journal Document Template:   
 Deposit Order:

Amount and Dates | Refund Policies | Nonrefundable Schedule

**Deposit Amount Calculation**

Amount:   
 Calculation Method:

Include Booking Fee(s)  
 Include Booking Credit Card Fee(s)  
 Include Travel Insurance Charge(s)  
 Include Housekeeping Charge(s)

**Deposit Due Date Calculation**

Due Date:   
 Action On Due Date:

- Enter the “Deposit Name”
- Select the “Deposit Type”
- Select the “Document Template”
- Select the “Cancellation Journal Document Template”

After clicking on the “New Deposit Template” button you will be at the Open Deposit Template window where you will enter Amounts, Dates, Refund Policies, and Nonrefundable Schedules for the Template you’re creating.

## Amount and Dates Tab

Amount and Dates | Refund Policies | Nonrefundable Schedule

**Deposit Amount Calculation**

Amount	Calculation Method	<input type="checkbox"/> Include Booking Fee(s)
0.0000	[select]	<input type="checkbox"/> Include Booking Credit Card Fee(s)
		<input type="checkbox"/> Include Travel Insurance Charge(s)
		<input type="checkbox"/> Include Housekeeping Charge(s)

**Deposit Due Date Calculation**

Due Date	Action On Due Date
[select]	No Action

- Enter the “Deposit Name”
- Select the “Deposit Type”
- Select the “Document Template”
- Select the “Cancellation Journal Document Template”
- Enter the “Amount”
- Select the “Calculation Method”
- Enter the “Due Date”
- Select the “ Action On Due Date”
- Click on the “Refund Policies” tab

Amount and Dates | Refund Policies | Nonrefundable Schedule

Refund partial or full amount of this deposit if booking is canceled but unit is later rebooked during booking period.

Cancel booking if this deposit is not paid

Refund Policy

If you put a checkmark in the box next to “Refund partial or full amount of this deposit if booking is canceled but is later rebooked during the booking period”, this will populate additional options for selection. You can designate a percentage of a refund to be returned to the customer if the booking is rebooked. You can also set specific guide lines for refunding deposits when a booking is rebooked for a lesser amount.

## Nonrefundable Schedule Tab

The screenshot shows a software interface with three tabs: "Amount and Dates", "Refund Policies", and "Nonrefundable Schedule". The "Nonrefundable Schedule" tab is active. It contains a table with two columns: "Amount that becomes non-refundable" and "Date this amount becomes non-refundable". To the right of the table is a button labeled "+ Add Nonrefundability Threshold". Below the table, a message states: "No nonrefundability thresholds have been defined in this deposit template. Click 'Add Nonrefundability Threshold' to add a nonrefundability threshold if portions of this deposit become increasingly nonrefundable as the arrival date approaches."

- Click on the “Add Nonrefundable Schedule” button on the right
- Enter the “Dollar or % Amount”
- Enter the “Time Increment” when the action shall be taken
- Select “Save”

This completes the “Setup” curriculum of VRS software. Before you go through the “Reservation” curriculum, it is recommended that you enter the appropriate information into VRS so that the curriculum will make sense, and you will be able to see examples. On the next page is a list of the recommended information.



## Pre-Reservations Information

- Units (minimum of 3)
- Rates (all rates that pertain to the above 3 units)
- Seasons (all seasons that pertain to the above 3 units)
- Owners (all owners that pertain to the above 3 units)
- Correspondence Templates (minimum of 3)
- Contact Names, Addresses, and Phone Numbers (minimum of 3)

If you're having challenges entering the information into VRS, or if there are any questions we can answer for you, please contact Technical Support.

## Escapia Support

### Training Material & Knowledge Base

[Home Page > Training](#)

Here you can view training videos, read training curriculum and FAQs. (Frequently Asked Questions.)

[Home Page > Knowledge Base](#)

In the Knowledge Base you can....

1. Browse articles by topic
2. Search by a specific topic or question.

### Technical Support Contact Info

- 1-800-Escapia (372-2742) x. 3
- [support@escapia.com](mailto:support@escapia.com)

Before contacting customer support, please have the following information on hand so that we may assist you the best way possible:

1. Booking Number, Reservation Number, or other relevant information
2. Detailed description of the issue you are having