

Setting Up Your Account - Setup Checklist

While referencing the full [Setup Checklist](#), use this to mark off your stepping stones:

- ☐ Payment Processor chosen and account request initiated
- ☐ Listing Content (entered into OwnerRez for each property)
 - ☐ If more than 10 properties, contact OR support first
 - ☐ Accommodations
 - ☐ Amenities
 - ☐ Descriptions
 - ☐ Guest Instructions
 - ☐ Health & Safety
 - ☐ Location
 - ☐ Photos
 - ☐ Rooms
- ☐ Property-Level Rules
 - ☐ Property Rules set on all properties
 - ☐ Cancellation Policy
- ☐ Seasons/Holidays and Rates
 - ☐ Seasons
 - ☐ Holidays
 - ☐ Rates
 - ☐ Dynamic Pricing tool?
- ☐ Additional Pricing Settings
 - ☐ Surcharges
 - ☐ Discounts
 - ☐ Taxes
- ☐ Travel Insurance - if using, is it all configured?
- ☐ Damage Protection Insurance - if using, is it all configured?
- ☐ **Listing Quality Analyzer - run for first-time**
- ☐ iCal
 - ☐ Import
 - ☐ Export
- ☐ Airbnb Proxy Email enabled (if using Airbnb)
- ☐ Channel Bridge (install and import bookings, if applicable)
 - ☐ Airbnb

- ☐ Vrbo
- ☐ Import Reviews (via Channel Bridge or Excel, if applicable)
 - ☐ Airbnb
 - ☐ Vrbo
- ☐ Direct Bookings (which route will you go?)
 - ☐ Hosted Website
 - ☐ Widgets
 - ☐ WordPress plugin
 - ☐ None
- ☐ Testing
 - ☐ Sample quote
- ☐ Custom Sources
- ☐ Payment Processing
- ☐ **Listing Quality Analyzer - run for second-time**
- ☐ Connect APIs
 - ☐ Airbnb
 - ☐ Vrbo
 - ☐ Others
- ☐ Verified Email Domains

Great job completing the above steps! Now, there are other steps to finalize, so keep going!

Existing Bookings and Calendar Syncing

- ☐ Sync calendars from [regional and national listing sites](#)
- ☐ [Import calendars](#) from the listing sites
- ☐ [Export OwnerRez calendar](#) to the listing sites
- ☐ Monitor syncing to ensure all sites are staying up to date

Historical Data Import

Have historical data?

- ☐ Import bookings
- ☐ Import payments
- ☐ Import refunds
- ☐ Import inquiries
- ☐ Import reviews

Fine-Tuning

- ☐ Other features to set up:
 - ☐ Messaging [Templates](#) (Email, Airbnb, SMS)
 - ☐ [Triggers](#) (Email, Airbnb, SMS)
 - ☐ [Rental Agreement\(s\)](#)
 - ☐ [Theming](#)
 - ☐ [Automated Locks](#)

Premium Features

- ☐ Turn on necessary OwnerRez premium features and configure:
 - ☐ [Hosted Websites](#) or [WordPress Plugin](#)
 - ☐ [Property Management \(PM\)](#)
 - ☐ [PM Portal Access](#)
 - ☐ [QuickBooks Integration](#)
 - ☐ [SMS Messaging](#) (if adding, make SMS [Templates](#) and [Triggers](#))

Ongoing OwnerRez Support Options

- ☐ Check out the OwnerRez [Support Center](#)
- ☐ Check out OwnerRez [Webinars](#) (past and future)
- ☐ Check out the OwnerRez [Forums](#)
- ☐ Check out the OwnerRez [Blog](#) (and subscribe to it!)
- ☐ Email OwnerRez [Support](#) with any unanswered questions