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
- ☐ [Request Guest Contact Information](#): select one (if using Airbnb or Booking.com)
    - ☐ Airbnb API-connected
    - ☐ Airbnb iCal-connected (non-API)

- ☐ Booking.com API-connected
- ☐ Booking.com iCal-connected (non-API)
- ☐ 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 + Integrated Sites
    - ☐ 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