ParkPilot AI

CUSTOMER DOCUMENTATION

Onboarding Guide

From first planning call to live AI agents:
what happens, when, and what we need from you.

Reduce admin. Improve response times. Stay in control.

Built by Park Operators, For Park Operators

parkpilot.uk · Version 1.0 · October 2026

WELCOME TO PARKPILOT

Getting you up and running

Onboarding with ParkPilot is guided from start to finish. We set your AI agents up alongside the park management system and CRM you already use, configure them around how your park actually works, and stay with you after go-live. There is no rip-and-replace and no disruption to how your team works today.

This guide gives you an overview of the process, so you know what to expect at each stage, who needs to be involved and what to have ready. Your ParkPilot contact will agree the detailed plan and dates with you on your planning call.

3 steps	1–2 weeks	2–4 weeks	2–4 hrs
Connect, configure, go live	Typical go-live for smaller parks	Full PMS + CRM integration, several agents	Setup session time with our team

Who is involved

From your park

- **Park Owner or General Manager**: agrees goals, approval rules and escalation policy.
- **System administrator or provider contact**: arranges secure API access to your park management system and CRM.
- **Reception, sales and aftersales leads**: help shape response templates and handover points.

From ParkPilot

- **Our onboarding team**: connects your systems, configures your agents and runs your setup session.
- **Your account manager**: your ongoing point of contact after go-live, with regular performance reviews. Every ParkPilot customer has a dedicated account manager.

Which agents are you onboarding?

Each agent is configured bespoke to your park. Most parks onboard their agents together; agents can also be added individually to any plan later.

Guest Services Agent

Bookings, availability, pre-arrival information, maintenance requests and post-stay follow-up.

Holiday Home Sales Agent

Qualifies ownership enquiries, books park tours and pushes warm leads into your CRM.

Aftersales & Owner Services Agent

Maintenance bookings, annual services, events and compliance queries for owners.

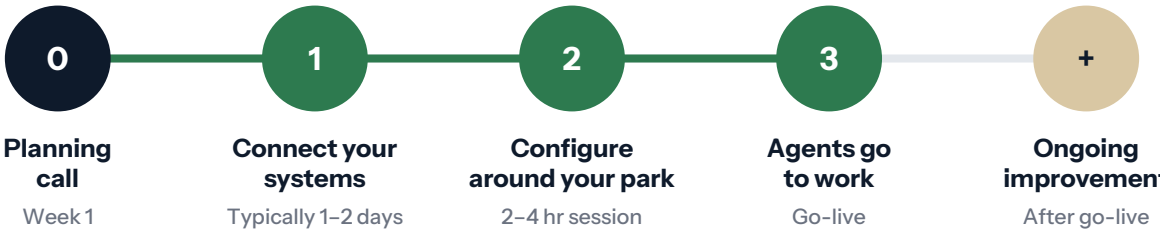
Admin & Compliance Agent

Site fee queries, utility billing, insurance requests and licence-related admin.

THE ONBOARDING JOURNEY

Three steps to go-live

Every onboarding follows the same shape. The time each stage takes depends mainly on your systems, the number of agents and channels, and how quickly park information and access can be gathered.



BEFORE WE START

Planning call

We agree your goals, which agents and channels you are starting with, the systems we will connect to and a target go-live date.

SYSTEMS TYPICALLY CONNECTED IN 1–2 DAYS

Step 1 · Connect

We connect securely to your park management system and CRM through their APIs, with read-only access to guest data by default.

SETUP SESSION: 2–4 HOURS

Step 2 · Configure

Together we set up your agents, approval workflows, response templates, escalation rules, notifications and channels. Your park, your rules.

GO-LIVE AND CONTINUOUS IMPROVEMENT

Step 3 · Go live

Your agents start handling routine enquiries 24/7, capturing ownership leads, creating tasks and sending a daily operations brief, with every action logged.

Typical timescales from planning to live operation

Park profile	Typical timescale
Smaller parks focused on general enquiries	**1–2 weeks**
Larger parks with full PMS and CRM integration across several agents	**2–4 weeks**
Multi-park groups (Enterprise)	**Agreed on your planning call**

Timescales depend on system configuration, API availability and access permissions.

STEP BY STEP

0 Planning call

Before we start

A short call with your ParkPilot contact to agree what success looks like and plan the work. By the end of it you will have an agreed scope, a list of what we need from you and a target go-live date.

What we do

- Confirm which agents and channels you are starting with
- Identify the systems we will connect to and what each allows
- Agree goals, a go-live date and your key contacts

What we need from you

- A decision-maker who can agree scope and rules
- An overview of your enquiry volumes and current pain points
- Names of your system administrator and team leads

1 We connect to your existing systems

Systems typically connected in 1–2 days

ParkPilot works alongside your existing park management system (PMS) and CRM, integrating with industry-standard systems via secure APIs. Your current systems keep managing your bookings and data exactly as they do today; ParkPilot reads from them and, where your system allows, writes confirmed actions back.

What we do

- Set up a secure API integration with your park management system
- Configure access to guest data (read-only by default, configurable)
- Enable real-time synchronisation of bookings and availability
- Connect your CRM for automated lead creation and custom field mapping
- Confirm exactly what can be read and written during onboarding

What we need from you

- API access for your PMS and CRM, arranged through your system administrator or provider
- A named contact for any technical questions
- Agreement on any actions that should stay read-only

No CRM, or one not built for holiday home sales?

We recommend ParkPilot CRM, our own CRM designed for holiday park sales teams. See page 7 for how CRM onboarding works.

2 We configure around your park

Setup session: 2–4 hours with our team

This is where your agents learn how your park works: touring pitches and holiday home plots, seasonal pricing, site fees, facilities and the way your team likes to respond. Nothing goes live until your team is happy with how your agents will behave.

What we do

- Set up each agent bespoke to your park
- Define approval workflows for financial actions
- Customise response templates for common scenarios
- Set escalation rules for complex enquiries
- Configure notification preferences and the channels each agent uses

What we need from you

- Park information: accommodation types, pricing and seasons, facilities, policies and FAQs
- Who should receive escalations, leads and tasks, and when
- Access to the channels you want covered, such as your website, WhatsApp or SMS
- Time from your team leads to review and sign off templates and rules

Channels available: website widget, mobile app widget, SMS, WhatsApp, Facebook Messenger and email, configured per park based on where your guests and owners are most active.

3 Your agents go to work

Go-live and continuous improvement

From go-live, your agents handle routine guest enquiries, capture ownership leads, create maintenance jobs and support owners around the clock. Your team focuses on what needs a human touch.

What we do

- Switch on your agents across the agreed channels
- Route tasks and qualified leads to the right people automatically
- Deliver a daily operations brief each morning
- Monitor early conversations closely and fine-tune responses

What we need from you

- Brief your team on how handovers and escalations will reach them
- Flag any response you would like changed
- Keep us informed of new policies, prices or seasonal changes

AFTER GO-LIVE

Our support continues

Onboarding does not end at go-live. We keep optimising your agents and looking for new opportunities to save your team time.

Continuous improvement

Your agents get more accurate and effective over time, with no extra effort from your team.

Regular check-ins

We review performance with you, identify new automation opportunities and optimise your configuration.

Dedicated support

A named account manager who understands your park and is on hand whenever you need us.

BUILT IN FROM DAY ONE

You stay in control

Your team decides what is automated. These controls are part of every onboarding.

Human approval controls

All financial transactions require explicit staff confirmation. Booking changes go through your park management system with your approval rules.

Full audit log

Timestamped records of every AI action, so you can always see what was done, when and why.

Escalation rules

Complex or sensitive enquiries are handed to the right member of your team, with a summary of the conversation.

UK GDPR aligned

Proper lawful basis, data minimisation and full support for data access, correction and deletion requests.

PARKPILOT CRM

Onboarding ParkPilot CRM

ParkPilot CRM can be used on its own or alongside ParkPilot AI. Onboarding follows the same guided approach, focused on getting your sales office working from one clear pipeline: Enquiry, Appointment, Park Tour, Closed Sale.

1. **Bring your data across**
   We import your leads and owners from spreadsheets, generic CRMs and most park management systems. Data migration is included on the Group plan.
2. **Set up your pipeline and park**
   We configure your pipeline stages, users and, on Professional, your Plot & Stock Map, part-exchange tracking and owner aftercare.
3. **Get your team selling**
   Your advisors start working leads, scheduling viewings with reminders and using the mobile advisor view out on the park.
4. **Connect your agents**
   If you also use ParkPilot AI, the Holiday Home Sales Agent's qualified leads flow straight into your pipeline with the full conversation attached.

Built-in data protection

ParkPilot CRM includes consent tracking, right-to-erasure tools and role-based access, so the right people see the right records from day one.

BEFORE YOUR PLANNING CALL

Your preparation checklist

You do not need everything in place before we start, but having these ready will help you go live sooner. Tick them off as you go.

Systems and access

- [ ] Name of your park management system and CRM
- [ ] Contact details for your system administrator or provider
- [ ] API access arranged, or a request raised with your provider
- [ ] Decision on which actions should stay read-only

Park knowledge

- [ ] Accommodation and pitch types, with seasonal pricing
- [ ] Facilities, opening times and arrival information
- [ ] Policies: bookings, cancellations, pets, site fees
- [ ] Your most common guest and owner questions

People and rules

- [ ] Who signs off approval workflows and escalation rules
- [ ] Who receives ownership leads, tasks and escalations
- [ ] Out-of-hours escalation contacts
- [ ] Team leads available for the 2–4 hour setup session

Channels

- [ ] Website access for the chat widget
- [ ] WhatsApp, SMS and Messenger accounts you want covered
- [ ] Shared inbox for email handling
- [ ] Where you want the daily operations brief delivered

COMMON QUESTIONS

Onboarding FAQs

Do we need to change our park management system or CRM?
No. ParkPilot works alongside the systems you already use. Your current systems continue managing your bookings and data exactly as they do today.

Will onboarding disrupt our team?
Very little. Your main time commitment is the planning call and the 2–4 hour setup session. We handle the technical connection work.

Can we start with one agent and add more later?
Yes. Agents can be added individually to any plan, so you can start where the need is greatest and expand.

What happens if an agent cannot answer a question?
Your escalation rules hand the conversation to the right person on your team, with a summary so nobody has to start again.

Is there a setup fee?
There is no setup fee on the Starter or Professional plans, or on any ParkPilot CRM plan. Enterprise includes a one-time onboarding fee.

How do we see what the agents are doing?
Every AI action is recorded in a full, timestamped audit log, and your daily operations brief summarises arrivals, departures and priority issues each morning.

Need help getting started?

Our team will guide you through every step.

Phone **07907 992403** Email **info@parkpilot.uk** Support **www.parkpilot.uk/support**

Not a customer yet? **Book a demo at www.parkpilot.uk/book-demo**

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