Instant-Quote.co   User Guide

Note

This document is purely aimed at operation of the Administrative interface and should be read in conjunction with the Instant-Quote.co configuration guide as that document contains some key concepts. The document can be found here: https://www.instant-quote.co/documents/IQ_Configuration_Guide.pdf

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Introduction

The Instant-Quote.co system offers a single management system that enables you to run a wedding transport business. As a complete quotation and back-office system it takes some time to become familiar with the interface and where features are located. This guide will help you understand the system and its capabilities even though you may choose not to use all of the functionality for your own business.

Logging in

To use the system you must be logged in. The login lasts for 20 minutes from whenever the last action was taken on the interface that calls the server. For example, loading a page or saving a setting is an interaction with the server. After 20 minutes of inactivity you will be required to log in again.

The web address for the log in screen is https://www.instant-quote.co/software/login.aspx

If you forget your password we can issue a new password to you by email. Just follow the instructions on the log in screen. Once you have received a new password, change it to something more memorable under the 'My Account' tab.

By default the log in screen takes you to the 'Dashboard' page. If you have been logged out due to inactivity you will be returned to the page you were working on before.

Navigation

Navigating the system is straight forward and all of the screens you will require can be accessed within a couple of clicks.

The primary navigation is through the expanding tab control to the left of the screen:
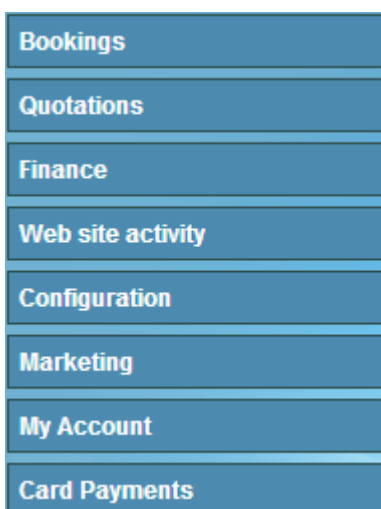
Selecting any of these buttons causes the tab to expand to reveal links to relevant pages for that tab. Any tab that was previously open becomes closed.

The system features four quick link buttons that access frequently used items as follows:

These buttons link to The Dashboard, New Booking, New Quotation and The Calendar.

Dashboard

The dashboard contains important information that you may wish to view on a daily basis. It is arranged into four zones:

1. Notifications area
2. Upcoming events
3. Web site activity
4. Financial information

The data displayed can be filtered by host using the check boxes at the bottom left of the interface. To display information for all of your hosts, each check box should be checked. Unchecking a checkbox removes the results for that host from the display.

Notification Area

The notification area is only displayed if the system has generated alerts for your account. You are alerted if:

a) The system cannot access your Google calendar (if you have given us access to it).
b) A vehicle is due for a statutory test.
c) There have been errors in sending your emails.
d) You have incomplete bookings.

Bookings for the next fourteen days

A table is displayed providing a reminder of events for the next fourteen days in chronological order. The table displays events in rows of up to four bookings and a link is provided to the next four. If the booking is for today, the date will be displayed in red.

For each booking a link is provided to the bookings editor. Selecting View/Edit loads the booking detail into the editor.

Web site activity

Web site activity is divided into three tables:

1. Dates selected by users.
2. Quotations sent out.
3. Bookings received.

Each of these tables displays information for today, 7 Days and 30 Days. The values are cumulative so the 30 day figure is the sum of all quotes sent in the last 30 days. The Quotations sent out are all of the quotes sent including any repeat quotes. (This is NOT the figure used for system billing which only counts one quotation for a customer email address for a given date).

Financial Information

The financial information tables detail the schedule of payments due, any payments that are overdue and the total receipts for the year to date from 1st January.

Figures for 'Payments expected' are NOT cumulative.

Filter

At the base of the navigation pane there is a button market filter. This allows you to filter results according to your hosts. A number of pages use the filter and it persists from page to page. De-selecting hosts using the filter allow you to display fine-grained results for your individual hosts.

Bookings

The bookings tab contains links to booking related web pages. These pages allow you to quickly locate your bookings, view your bookings on a timeline or calendar, display management information or create a new booking.

Creating a New Booking

There are three methods of creating a new booking:

1. The customer can make a booking on line.
2. You can use the New Booking wizard.
3. You can use the Quick booking form.

Customer generated booking

If you provide customers with a link in your quotations (using the template editor), Customers can create their own booking which is applied to the system. Although there are many checks that endeavour to make the booking 'safe', if you are not comfortable with customers making their own booking the link can be omitted from the quotation template.

If you allow customers to make their own booking, the booking wizard takes them through the process and you will be notified by email of any new bookings that are made.

The system will not permit a booking for an asset that is already booked and will not accept a booking from out of the geographic area you have stipulated.

The 'New Booking' wizard

Generally a customer will have had a quote before making a booking, The fastest way to create a booking is to find the quote (either in 'Quotation History' or 'Find Quotation') and select 'Create booking' from the top left of the page. This will load the booking wizard with many of the fields pre-populated.

The 'New Booking Wizard' takes you through all of the information that you are likely to need for a booking and re-calculates the price at the end before making the booking. To progress through the wizard select the Next button, this is located at the bottom right of the form. After 20 minutes of inactivity the form will take you back to the first page of the wizard, however, your changes will have been saved.

Booking wizard page 1

If you load the wizard from a link on a quotation, you cannot change the host the quote booking is assigned to and in all cases the Booking Reference is generated automatically.

Booking wizard page 2 - People

The system insists on at least one contact, email address and a telephone number. If the booking is based on a quotation the email address that the booking was sent to can be found on the right of the screen. This can be copied and pasted into the form.

Booking wizard page 3 - Dates

The ceremony date and the end date are entered on this form. The ceremony date cannot be in the past and the end time cannot be before the ceremony time.

Booking wizard page 4 - Assets

Those assets which are available (i.e. not marked as off road) are displayed and any that were quoted for are pre-selected. Select only the items required for the booking.

Booking wizard page 5 – Journeys

The system calculates prices relating to journeys so the information must be correct. It also places some restrictions on data entry.

1. With the exception of the first journey, <u>every journey must start with the end of the previous journey</u>.
2. To allow passengers to embark and disembark, there must be a minimum of six minutes between journeys.
3. As the journeys are listed in chronological order, for complex combinations of journeys it is sometimes best to clear the table and start again!

Despite these restrictions, the journey information is flexible and can include interim stops and different journeys for each asset involved in the booking.

Be sure to set the departure time from the booking. This can be on the following day but consider that the time calculation is based on the data entered on this form.

You will not be able to book an asset that is already booked for some or all of its intended journeys.

Booking wizard page 6 – Extras

Extras or options can be added to the booking using the Extras form. Apply the options you have previously configured (in the system configuration).

Booking wizard page 7 – Vouchers & lead person

If you generate vouchers using the system, if a voucher has been sent to this email address, the voucher code will automatically appear; alternatively a voucher code sent to an alternate address can be entered and validated at this point. The discount will be applied to the final booking value.

A new lead person for the booking can be entered or an existing person selected from the drop down list. The email that is entered on this form is where the booking confirmation will be sent to.

A discount can also be applied to the booking, or a fixed price applied. If this is less than the calculated amount it is shown as a discount to the customer.

Booking wizard page 8– Booking summary

A summary of the booking is displayed including an overview of the charges.

If the calculation is not the same as the quotation value, this is generally because the time involved in delivering the service is greater than that quoted for.

To adjust the calculated price, either set a fixed price on the earlier screen or adjust the journey times to match the quotation.

Details of how we reached the final price can be found by selecting the question mark at the bottom left of the form.

Booking wizard page 8– Payment Options

Select the payment options that are available. This will prompt you with the relevant information should you need to provide it to the customer over the phone.

Selecting next on this form makes some final checks then places the booking. A confirmation email is sent to the lead person's email address.

Quick Booking

Quick booking facilitates the input of a booking without the use of the New Booking Wizard. It's quicker than the wizard but does not have the facility to input extras and additional journeys.

Quick booking is typically used to input historical bookings taken before you implemented the system.

Quick booking does check availability of an asset but **does not prevent double bookings.**

Bookings taken in the quick booking form can be edited in the same way as other bookings – using the Edit booking page.

Edit Booking

To edit or update a booking select 'Edit Booking' from the Bookings Tab.

The Edit booking page contains all of the information about a booking and is linked to from many of the pages in the bookings tab. If you accept card payments using the system, it allows you to take card payments and assign them to the booking.

The details on the Edit booking page should be confirmed and updated when speaking to the customer.

The page is divided into seven tabs:

1. General
2. People
3. Journeys
4. Extras
5. Money
6. Calculation
7. Invoice

Loading a booking

A booking is loaded using the drop down list at the top of the page. The items in this list are solely future bookings. To access an historical booking, the booking must be loaded by selecting 'view' from 'Past Bookings' or 'Find Bookings' in the Bookings Tab or from a link in the Calendar.

Once the booking is loaded the booking reference and host that the booking is assigned to are displayed at the top of the page. If this is a booking taken by an agency using Instant Quote (Syndicated) will be displayed.

General Tab

- The General Tab provides the following functionality:
- Displays the booking date
- Change the Ceremony time
- Change the booking date
- Staff assignment
- Email booking details to staff
- Update the ceremony address
- Update journey address
- Update reception address
- Update Public notes
- Update Private notes
- Resend booking confirmation
- Update 'Booked by' information
- Cancel Booking
- Erase Booking

Updating addresses

When a booking is taken the address that is stored is that which is understood by the system. Some detail may be lost such as a house or hotel name or may not have been entered. It is normal practice to phone the customer prior to the event and at that time the details of locations should be confirmed / completed.

Entering or updating an address in the address boxes updates the journeys table – the addresses in the journeys table cannot be edited directly as this protects the integrity of the data.

Changing the booking date

Changing the booking date updates the journey information accordingly, however the journey information should be checked after updating.

The system **does not check for double bookings** when a booking date is changed.

Cancelling a booking

Selecting cancel booking makes the assets available for booking again. Bookings that have been cancelled can be restored unless they have been erased.

Cancelled bookings will still appear in the bookings tables under the Bookings Tab but will have a line through the text.

Restoring a booking

Bookings that have been deleted but not erased can be restored. Details of the booking should be checked once it is restored. To restore a booking select 'Restore Booking' on the 'General Tab' on the 'Edit Booking Page'.

Erasing a booking

Before erasing a booking, remove any associated payments you do not wish to keep. Erasing a booking is irreversible. The booking will be deleted from the system in its entirety (except for payments you have assigned to it).

Printing the schedule

The schedule for an event can be printed by using the 'Print Schedule' link. This will display the schedule information in a new page in the browser. Use the browsers print menu to print the schedule.

People Tab

The people tab lets you enter key participants in the event so you have contact details to hand. It is recommended that you collect the telephone number of at least contact for where they will be on the day of the event.

The system is 'keen' on colleting number for each contact. If a number is not provided, entering "000" will allow the record to be saved.

Journeys Tab

The journeys are fundamental to the system. If an asset does not have a journey, it will be removed from the booking and be available for booking again. The system attempts to pre-empt data entry by adjusting the journey departure time and the booking finish time. These can of course be incorrectly calculated and should be checked.

The system imposes a minimum time between journeys on several forms. These limits are not imposed on the this page.

Editing Journeys

As the system calculates prices by time and distance, journey information is critical and every journey must start with the end of the last journey. The very start and end of the booking is hidden but is the asset's storage or garage location.

Editing journeys can be tricky. As with the rest of the system, data is always live and the journeys table is no exception.

Care should be taken when entering journey information as the table displays the data in time order. If it is necessary to adjust the journey times it can be easier to start again rather than adjusting times, however if you are making the schedule later start with the last journey and work upwards. Conversely, if you are making the journeys earlier, start with the first journey and work through the list downwards.

Once you have finished editing the journeys, do not forget to update your Google calendar (if you use this feature).

Adding an asset to a booking

To add an asset to a booking, simply add journeys for the asset. The journeys for that asset will be displayed in an additional table and can be edited independently.

After adjusting the journey information, you may wish to recalculate the booking value. This can be done under the Invoice tab on this page.

Extras Tab

The Extras tab facilitates the assignment of Extras or options to the booking. The extra must be pre-defined in the Extras configuration (Configuration| Extras).

Extras are assigned either per asset or per booking and are displayed accordingly.

Checking the check box in the 'Add to Booking' column adds the item to the booking. Conversely deselecting the item removes the item from the booking. Your selections must be saved by clicking on the "Save booking Extras / Options" button.

After changing the booking extras, you may wish to recalculate the booking value. This can be done under the Invoice tab on this page.

Money Tab

The money tab deals with all financial aspects of the booking. It allows you to view the payment schedule and edit the deposit amount and booking value, record payments for the booking and take card payments. You can also record expenses associated with the booking,

Editing a booking value

The deposit amount and the pre-tax total of the booking can be edited. To do this select edit from the payment schedule.

Editing these figures does not adjust the Invoice. The invoice must also be edited manually.

Updating payment information

When you are paid by a customer we advise you to add the payment to the receipts table.

Keeping this up-to-date updates the system dashboard and financial statement and helps prevent incorrect payment reminders being sent out - if you have configured the system to send these.

(The system's card service automatically updates payment records.)

You can send a preformatted email to the customer as a receipt by selecting the 'Send email / receipt' button. You can use this facility to send any message to a customer by changing the content in the on page editor.

Taking a card payment

If you have configured the system to take cards, the card payment form will be displayed.

Simply enter the card details to take payment. If the payment is successful, the payment records will be updated.

Note: If you make a charge for processing cards you must advise the customer. This information should be included in your booking confirmation. Edit this in Configuration | Documents.

Assigning expenditure

Where you incur expenditure whilst delivering the booking, you can keep track of this by adding data to the Assign Expenditure form on this page. To do this you must have configured expenditure under Finance | Expenditure Categories.

Assigning expenditure causes items to appear in the financial statement.

Calculation Tab

The calculation tab enables you to see how the system calculated the values for the booking and is useful for understanding how the system works and configuring your pricing model.

Invoice Tab

The invoice tab displays a Customer Invoice. It also enables you to recalculate the booking value if you have made changes to the booking,

If you want to amend the invoice for some other reason, you can do this by editing the invoice directly in the editor and saving it.

The format and content of the invoice can be edited in the document template editor – under .Configuration | Documents.

Note: Recalculating the invoice does not update the booking values. If you wish to update the booking values use the Payment Schedule table under the Money tab.

Calendar

The Calendar is a read only page that displays information by date. The calendar can display bookings by Day, Week, Month and Year along with displays covering two days arranged with assets across the top (labelled Assets) and assets down the left side (timeline) . Only 'Bookings' and 'Assets made unavailable' information is displayed in the Calendar for the last previous twelve months and onwards are displayed.

Selecting the calendar icon to the top left of the calendar opens a mini-calendar allowing navigation to a particular day.

Items that span more than one day are displayed at the top of the calendar in day view.

Selecting a calendar item causes the calendar to display a modal dialogue box which contains information about the booking including:

1. The asset selected and a link to edit the booking.
2. The booking details.
3. The time span for when the asset is tied up.

Find Booking

Find booking facilitates a booking search. Search criteria can be entered into any one of the field to the right of the page. When a field loses focus a search is undertaken by the system.

The search looks for items that include the data you have entered and multiple records may be returned for the same booking.

To find past bookings, the 'include past bookings' check box must be selected.

Selecting view from the returned items opens the edit booking page for that booking.

Future Bookings

The Future bookings page displays a list of upcoming bookings.

The final column informs you if there are more assets assigned to the booking than staff.

If a booking has been syndicated to you from an agent, the background colour is gold.

If a booking has a line through it, the booking is cancelled.

If a booking's text is displayed in pink, this is an incomplete booking that has not been placed.

Selecting view from a booking record opens the edit booking page for that booking.

Past Bookings

The Past bookings page displays a list of historical bookings.

If a booking has been syndicated to you from an agent, the background colour is gold.

If a booking has a line through it, the booking is cancelled.

If a booking's text is displayed in pink, this is an incomplete booking that has not been placed.

Selecting view from a booking record opens the edit booking page for that booking.

Recent Bookings

The recent bookings page displays a list of bookings ordered by when the booking was placed and is frequently the fasted way of accessing a booking that has been placed recently.

If a booking has been syndicated to you from an agent, the background colour is gold.

If a booking has a line through it, the booking is cancelled.

If a booking's text is displayed in pink, this is an incomplete booking that has not been placed.

Selecting view from a booking record opens the edit booking page for that booking.

Incomplete Bookings

The Incomplete bookings page displays a list of bookings that have been started but not completed. You can use this to help customers who need assistance in completing an online booking.

To maintain consistency the booking text is Pink.

Selecting view from a booking record opens the edit booking page for that booking.

Selecting Delete erases the booking.

Bookings by Asset

Bookings by asset is a search tool that enables you to go some way to establishing the value of bookings an asset has earned. However, as more than one asset can be assigned to a booking, a definitive answer cannot be established.

The search returns a list based on the booking date (not the service delivery date).

Staff Assignment

Staff assignment displays a list of bookings that a staff member has been assigned to.

To include past bookings check the Include past Bookings check box.

Bookings Charts

Bookings Charts shows a range of graphs relating to bookings.

Quotations

The quotations tab contains all of the web pages relating to quotations including searching for quotations and working with quotations.

Create a quotation

Create a quotation loads the Quotation Wizard.

A quotation can be created or created and emailed. Creating a quotation without sending it is useful for testing your pricing model.

To create a quotation:

1. Select the host you want the quotation to come from.
2. Select the Date of the event – available assets will be displayed
3. Check the check box for each item you wish to quote for,
4. Select Next from the bottom right of the screen.
5. Complete the 'Quotation times and journeys' page.
6. Select Display route to confirm the locations entered are as intended.
7. You will be warned if the journeys exceed your prescribed limits. You can override these by setting the Override mileage limits check box.
8. Complete the Optional Extras page. You can set a fixed price for the quotation should you so wish.
9. Select Next.
10. The quote is displayed and can either be simply saved or saved and sent by email.
11. You can examine how the system reached the quotation value by reviewing the Explanation of price Calculation.

Quotations you have saved can be found using 'Quotations | Find Quotation' or through 'Quotations | Quotation History'.

Find a quotation

Find quotation facilitates a quotation search. Search criteria can be entered into any one of the field to the right of the page. When a field loses focus a search is undertaken by the system.

The search looks for items that include the data you have entered and multiple records may be returned for the same quotation.

Selecting the button from the returned items opens the quotation. A booking can be created by selecting 'Create Booking' from the top of the page. This loads the booking wizard with as much data as possible ready populated.

Trial quotations can be deleted by selecting Delete from the appropriate row in the table. You will be asked for confirmation that you want to delete the quote. Once deleted, the quote will appear with a line through it until the table is updated. Quotations cannot be undeleted.

Quotation History

Quotation History displays a list of quotations in date order with the most recent first.

Each row starts with a button that loads an editor where you can make notes about any conversation you have had with the customer. The popup editor lists all of the quotes the customer has received for that email address.

Each row has a button with the quotation reference. This is used to load the quotation. The block voucher button prevents voucher (i.e. follow-up) emails being sent to the customer. Quotations can be deleted by selecting Delete from the appropriate row in the table. You will be asked for confirmation that you want to delete the quote. Once deleted, the quote will appear with a line through it until the table is updated. Quotations cannot be undeleted.

Selecting the button with the quotation reference on it opens the quotation.

Details entered for the quotation are displayed along with a copy of the email that was sent to the customer.

If there is an error in the email address, select 'Change email address'. You will then be able to update the email address. Select 'Update' to save the changes. The quotation reference button will have to be selected again to reload the quotation. The quote can then be resent by selecting the re-send button.

Selecting the calculations button loads a page that displays how the system reached the quotation value.

A booking can be created by selecting 'Create Booking' from the top of the page. This loads the booking wizard with as much data as possible ready populated.

Selecting close takes you back the Quotation History table.

Quotation Values by Month

Quotation Values by month loads a table so you can examine the value of quotations sent out each month. The table can be sorted by selecting the table header so you can compare months in different years,

Quotation Charts

Quotation Charts shows a range of graphs relating to quotations. Holding your mouse over a graph element shows further detail where available.

Finance

The finance tab contains links to all of the finance specific pages. These tell you what money is due in and when, historical information and record keeping.

Payment Schedule

Payment schedule displays a list of upcoming payments ordered by date. Payments that are overdue are displayed in red.

Selecting the booking reference from the table loads the booking into the booking editor.

Sales

The sales page displays a graph and table of booking values. The figures relate to the date the booking was taken, not the delivery date.

The bookings table can be sorted to enable further inspection.

Receipts

'Receipts' provides a table of payments received. It is loaded with receipts for the last month but can display any time period.

The total value of receipts for the period is displayed at the base of the table. The amount excludes card processing charges.

Add Expenditure

Add Expenditure provides a form to append expenditure to your financial statement.

To use 'Add Expenditure' you must first have created expenditure categories in 'Finance | Expenditure Categories'.

Expenditure is added on a host by host basis. This allows you to maintain profit centres for each of your web sites.

To add expenditure items:

1. Select the host.
2. Select the Category – Sub categories will be displayed.
3. Complete the form and select Add for each item you wish to add.
4. The items will appear in the table below where they can be edited or deleted.

If you find a category is missing, select the Manage Categories link from the top of the page. This loads the Expenditure Categories page where a new category or subcategory can be added.

Financial Statement

Selecting financial statement loads a table that displays all of the financial data held by the system. The table is ordered by date.

The credit table reflects the total received before credit card charges were applied.

The Net Credit column displays the total after both any transaction charge you apply and charges levied by the system and card processor are applied.

Date ranges can be applied to select the data the table displays.

The table can be downloaded as a CSV file. To download the data from the table select the arrow adjacent to the printer icon towards the top of the page.

Expenditure Categories

To enable you to categorise your expenditure the expenditure categories page allows you to create categories and sub categories as you wish.

Each of your hosts can have their own set of categories and sub categories to enable you to manage your hosts as profit centres.

Use the form on the page to add and delete categories and sub categories.

Expenditure categories structure example

- www.myhost.com
  - Service Delivery
    - Parking
    - Refreshments
    - Ribbons
  - Marketing
    - Advertising – Brochures
    - Facebook advertising
    - Google AdWords
    - Web Site hosting
    - Wedding Fairs
    - Yell.com
  - Vehicles
    - Car tax
    - Insurance
    - Parts
- www.myotherhost.com
  - Service Delivery
    - Parking
    - Refreshments
    - Ribbons
  - Marketing
    - Advertising – Brochures
    - Facebook advertising
    - Google AdWords
    - Web Site hosting
    - Wedding Fairs
    - Yell.com
  - Vehicles
    - Car tax
    - Insurance

Etc.

Web site activity

The Web site activity tab displays information relating to activity by users on your quotation calendar - be it the embedded calendar, Facebook quotation page or hosted quotation form on your web site.

It does not provide information about page activity unrelated to the system.

Dates Selected

The dates selected page provides a table of events on your calendar. The following information is provided:

1. When the calendar was clicked.

2. The date selected.
3. The IP address of the visitor.
4. The Day of the week they selected.
5. The number of weeks away the selected date is.
6. The location of the user – where we can ascertain it.

The facility to delete date selections is also provided. This can be useful if you have been testing or have suffered a nuisance site visitor.

To delete records from the table, copy the IP Address from the IP Address column into the field at the base of the table and select 'Delete records with this ip address. The records will be deleted.

Selected Dates Carts

This page displays a charts pertaining to activity on your quotation calendar.

Visitor location map

This page displays a high level map of your part of the world with markers for displaying the approximate location of web site visitors that have selected a date on the calendar.

The map can be set to display data for:

- The last 30 days
- The last 60 days
- The last 90 days

Each date selection from your calendar is represented by a point or filled circle on the map. The more visits from a location, the larger the circle becomes. Where circles overlap, holding the mouse over the circle displays a zoomed view of the area. Holding the mouse pointer over a circle causes the name of the location and number of date selections to be displayed.

The display for this is provided by Google and can take a few moments to populate.

Configuration

The configuration tab contains most of the configurable system settings. Please see the Instant-Quote.co configuration guide when using these pages.

Marketing

The marketing tab contains pages that enable you to:

1. Upload and send promotional emails from purchased databases.
2. Configure follow-up / voucher emails.
3. Measure marketing email response.
4. Download contact details for users receiving a quote.
5. Configuration utility so that emails are sent from your email server.

Upload Sales Leads

This page enables you to upload purchased leads from supported lead suppliers and send personalised emails to each person on the list. The email that is sent is designed by yourself in the Template Editor which can be found under Configuration | Documents.

The system prepares the email you want to send but to use the facility you must provide the details of your own email server. This is most likely the email server of your ISP.

The system supports lists from UK Bride and The Wedding Guide. Others may be supported on request.

You can check the design of the template by sending yourself a test email. A button is provided for this purpose.

The steps for using the facility are as follows:

1. Design your template in the template editor (configuration | Documents).
2. Configure your email settings (Marketing | Your Email Server).
3. Go to Upload Sales Leads (Marketing | Upload Sales Leads).
4. Send a test email.
5. Do not proceed until you have checked the test email.
6. Upload the csv file provided by your lead provider.
7. View or Send as required.

Follow-up / Voucher Emails

After a quotation is sent, a follow-up email can automatically be sent at a later date. We refer to these as 'Voucher Emails'.

The Voucher Email email may include a Discount Voucher of your own design as part of the HTML email. The value of that voucher can be specified and the discount is automatically applied to a customer booking on-line.

You can specify the delay between when this email is sent and the period before the booking. For example: no sooner than 7 days after sending a quote but within 5 months of the event being quoted for. These values can be different for each of your hosts.

The email is designed using the Template Editor in Configuration | Documents.

Sales leads response

Using Sales lead response you can measure how many of the emails you send out cause people to visit the quotation page and get a quote.

To use this this feature, select the start date from the calendar and customers getting a quote that were sent a lead email will be displayed in a table. You can also see if they have unsubscribed to future emails from you.

Quotation contact info.

This page lists people who have had a quote where the event (wedding) date is between two given dates but have not booked.

The table allows you access to potential customers that can be contacted if you don't have a booking for a given day. You should however use some caution as customers frequently use multiple email addresses when obtaining quotes.

Each row starts with a button that loads an editor where you can make notes about any conversation you have had with the customer. The popup editor lists all of the quotes the customer has received for that email address.

Your email server

The system provides access to an email server for emails generated by the system however for some services we may ask you to provide details of your own ISP's server and login details.

You may choose to use your own (your ISP's) email server as it offers significant advantages.

Using your own email server means that:

- Emails come directly from you.
- You are informed of undeliverable emails.
- You will not be penalised if the system gains a poor Spam reputation due to misuse by other users.

Configuration must be undertaken for each of your hosts.

To configure the submission of emails through your own mail server complete the form and select 'Test Your Settings'. The system will display an error if the settings are incorrect. Your settings will not be accepted until successful settings have been established.

Note: To use your ISP's mail server, you may have to enable relaying in your control panel provided by the ISP. If in doubt, speak to your ISP.

My Account

The My Account tab provides access to your billing information for the system and the facility to change your password.

Billing

Billing displays the billing for the current period and access to previous bills.

The billing for the current period is updated daily so you can anticipate upcoming charges.

The amount you are charged is set according to the plan that you are on.

It should be noted that the number of quotes charged for may not reflect the number of quotes in the system Dashboard. This is because in billing we do not count every quote sent out as customers occasionally press the quote button more than once.

For this reason we count quotes per email address for each distinct event date for the billing period.

Where the billing items exceed the quantity prescribed in the plan a supplement is added to the plan charge the following month.

Price List

The price list tab gives you access to your current and historical price lists for use of the system.

Billing Plan / Card Details

It should be noted that WE DO NOT STORE ANY CARD DETAILS ON THE SYSTEM – EVER. In fact we go to great pains to ensure that our program never sees any card details. These are handled by Stripe – our payment partners who provide us with a token that represents your card.

Changing your plan

Once your system trial has expired, if you want to continue to use the system you must be assigned to a plan. The different plans are shown in a table at the top of the page.

You can change plans at any time and the most you are committed to is one month.

You must also have a valid payment card registered with the system. We will apply charges to this card on a monthly basis – if there are any to apply.

To change your plan:

1. Select the plan you would like to use from the table.
2. The plan will be highlighted.
3. If your payment card is not up-to-date then update your card details and select use this card.
4. The page displays your current plan and a message showing which plan you will be on.
5. Select Change My Plan.
6. Your plan will be updated.

Updating your payment card

To update your payment card fill out the form New Card Details and select Use this card. The card will be checked and if the check is successful this card will be the one to which we apply charges.

Cancelling your subscription

If you want to stop using the system, select 'Cancel my subscription'. This takes immediate effect.

Change Password

System passwords are stored in the database in an encrypted format. We cannot tell what your password is by inspecting the database. If you lose your password the password cannot be recovered – use the forgotten password form on the login page to request a new password.

To change your password:

1. Enter your old password.
2. Enter your new password.
3. Repeat your new password.

Card Payments

To configure card processing please download our document 'taking card Payments on-line which can be found here: https://www.instant-quote.co/documents/IQ_card_processing.pdf.

Accept Credit Cards

Accept Credit Cards loads the Enable Card Processing page.

To begin accepting cards:

1. Select the hosts to which you want to add card processing.
2. Select your business type.
3. Select Connect With Stripe.

You will be redirected to the stripe sign-up page.

Once you have completed the details on that page Stripe redirect you back to us where we enable card processing on your account.

Please be aware that after you have accepted your first payment though stripe you will need to provide further proof of identity such as a copy of a page from your passport.

Card processing fees

Processing cards does not come for free so we enable you to make a card processing fee to pass on to the customer.

If you apply a card processing fee the customer must be advised before they begin the payment process. We suggest you modify your Booking Confirmation Email accordingly.

We apply a card booking fee as a percentage of the sale price. The amount to be added is displayed at the time of payment. If the customer is on the phone you must get their agreement to the card processing fee.

To configure the fee you feel appropriate:

1. Locate the host in the table and select Edit.
2. Enter the percentage in the field named 'Card Surcharge %'.
3. Select Update.

When paying by card, customers will now be charged a surcharge of the percentage you have entered.

Note:

Stripe terms and conditions state: 'You will not impose an excessive fee or surcharge on a customer that seeks to use an eligible payment card. If you impose a fee or surcharge it must be limited to reflect your costs for the use of such payment card.'

Quick Card payment

The quick card payment page allows you to take card payments unrelated to bookings.

Do not use this form for payments relating to bookings as they will not be applied appropriately to the customer's account balance or financial statement. To apply a payment to a booking, use the card payment form under 'Money' on the edit booking page.

If you apply a card payment surcharge, the customer must be advised before the payment is processed.

To process a card payment, simply complete the form and select process payment.

You will be advised if the transaction is successful.

Agency

The agency tab is for the purposes of wedding transport agencies to manage their bookings and outbound payments.