

Quote Settings

Overview

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Currency / Tax

Specify currency to display for calculating rates.

Action [Quote Settings > Currency / Tax](#)

Setting the Currency and Symbol

In the **Symbol** box enter the currency symbol associated with the currency for example \$ for the USD

In the **'Name'** box enter the name of the currency for example 'US Dollars'. Check the box if your rates include Tax

Local Tax Settings

Click on the drop down menu to set the tax information for your region.

Property Manager will calculate the taxes when a quote is requested by your potential guests or when you use the built in Quote Calculator in Property Manager.

Add a New Tax Rate Region

You can add custom tax rates and regions. For example add the UK VAT rate at 17.5% as the sales tax. If only one tax is applicable the set the tourist tax to 0.

Press the **'Add'** button then enter the Sales tax and Tourist tax (if applicable) the press **'OK'**

Note: If you have the Enterprise version installed your tax rates can be seen by all your owners. If you have the home owner version installed only you and your Enterprise can see your tax rates.

Short Stays / Cleaning / Other

Specify currency to display for calculating rates.

Action [Quote Settings > Short Stays/Cleaning](#)

Setting Short Stays

The screen sets the minimum number of nights allowed. If you use online bookings then the minimum booking period is set the the 'Minimum Night Stay' when a guest is making an online booking.

Cleaning Fees for short bookings

If a cleaning fee is charged for short bookings then tick the box 'Charge a cleaning fee for short bookings'. You can set the amount and how to calculate the amount.

Pool Heat

Set how pool heat is charged for a booking.

Action [Quote Settings > Pool Heat](#)

Setting Pool Heat

If the pool heat is included in your standard rates then check the box

If the pool heat is not included in your standard rates then you can set if the pool heat is charged weekly or daily and the amount to charge can be set.

Down Payment / Balance

Manage down payments and balance for online bookings

Action [Quote Settings > Down Payment / Balance](#)

Balance Payment

Set the number of weeks prior to the rental before the full balance is due. Set to 0 if full payment is required at all times.

Down Payment Amount

Specify how the down payment should be specified and an online booking

Online Bookings

Manage down payments and balance for online bookings

Action [Quote Settings > Online Bookings](#)

Online Bookings

The allow online bookings features can be enabled or disabled. When enabled the Quote/Book button will be visible on the web site for the selected property. Guests can book online. This should be set per property. Only properties that have the feature set can be booked online.

Terms and Conditions

Select the Terms and Conditions to apply to the selected property from the drop down list. See the next section (how to add Terms and Conditions)

Terms and Conditions

Manage Terms and Conditions. Multiple sets of Terms and Conditions can be added and stored. Terms and conditions can be assigned to a property using the 'Online Bookings' tab.

Action [Quote Settings > Terms and Conditions](#)

Add a new Terms and Conditions

To add a new set of Terms and Conditions press the 'Add' button and new entry will appear in the left menu 'Enter a Name'. Set a name for your new set then enter the text in the right pane.

Note: If you are pasting text from another application:

If you copy text from a rich text editor like Microsoft Word then it will also copy all the formatting which may be incompatible and could produce unwanted results.

It would be advisable to copy the text in to a plain text editor like 'Notepad' first then copy the text from your plain text editor and paste it in to the Terms and Conditions text window.

Quote Manager - Get Quote

Overview

Display a quote for the specified arrival and departure dates.

Action [Quote Manager > Get Quote](#)

Getting a quote

Enter the requested Arrival and departure dates using the date drop down menu, check the Pool heat box if pool heat is required, then press the 'Quote' button. The following information will be displayed:

- Owner - the name of the home owner
- Property - the name of the property
- Beds - the number of bedrooms in the property
- Config - the bedroom configuration of the property
- Baths - the number of bathrooms
- Games - checked if the property contains a games room
- Pool - checked if the property contains a swimming pool
- Spa - checked if a property contains a Spa
- Total for the stay including taxes
- Available - check if the property is available for the specified dates

Total

The total amount for the booking is displayed based on the rates entered when the property was first setup. You can override the total by entering a new amount in the total fields

Creating a booking

To create a booking based on the information shown, enter the name of the guest and press the 'Create Booking' button. You can add edit more booking information from the 'Bookings Manager' screen

Save / Email Quote

The quote can be saved and an email containing the quote can be sent to the guest

To save the quote press the 'Save / Email Quote' and enter the Guest name, Guest email and Guest Telephone then press the 'Save Quote' button

To save and email the quote to the guest, press the 'Save / Email Quote' and enter the Guest name, Guest email and Guest Telephone, check the email box then press the 'Save Quote' button.

When the quote is email to the guest the following information will be sent to the guest:

- The quote for the specified dates
- The property descriptions
- the property images

The quote is also saved to the saved quotes screen

To view a Saved Quote:

[Quotes Manager > View Saved Quotes](#)

Quote Settings - Edit Rate Bands

Overview

Set the rate for each period of each year. You can set the period and the rate charged for that period. The information will be displayed on your web site in a table format. The information will also be used to create an online quote and to create a quote from the Property Manager quoter (located on the main menu bar).

Action [Quote Settings > Edit Rate Bands](#)



The following features are available:

- Add/Edit a Rate Set
- Add/ Edit a Rate Band
- Rename a Rate Set
- Copy a Rate Set
- Assign Rate Sets to Properties

Rate Sets (definition)

A Rate Set is a user definable set of rates that can be assigned to one or more properties. For example, you could define a set of rates for '3 bedroom standard' properties and assign this rate set to all 3 bedroom standard properties. These properties would all share the same date bands and rates. Another example is to assign individual rate sets for each property so each property has its own date bands and rates.

Date Bands (definition)

A Date band is a period of time for which a property rental rate is valid. For example from 11/11/2010 to 12/31/2010 have the rate of \$1000. The amount is the weekly amount for the rental. Short rental for less than one week can be specified from the menu:

Quotes Manager > Quote Settings > Short Stays / Cleaning / Other

Creating a New Rate Set

Quotes Manager > Edit Rates > New Set > Enter a name your New Set (usually the name of the property or if shared something like '3 Bedroom standard')

Adding a Date Band

Quotes Manager > Edit Rates >

1. Press the '**Add Date Band**' button
2. Enter the '**Date From**' by clicking on the date drop down
3. Enter the '**Date To**' by clicking on the date drop down
4. Enter the Weekly rate for the selected period

Repeat steps 1 to 4 until you have assigned at least 18 future months. The system can not quote for a future date if only a s few months have been assigned a value.

Assign a Rate Set to a Property

To assign a set of rates to a property click on the '**Assign Rates to Properties**' (tab). The properties will be listed in the left column. Click on the right column to select the Rate Set that should be assigned to the property.

Rename a Rate Set

Quotes Manager > Edit Rates > Rename Set

Delete a Rate Set

Quotes Manager > Edit Rates > Delete Set

Copy a Rate Set or Date range to another property

You can copy date ranges or entire date sets to other properties. This can save time if you have many properties.

Note: Date range, copies only the date bands.

1. Quotes Manager > Edit Rates > New Set > Enter a Name for the new set
2. Quotes Manager > Edit Rates > Copy Rates > Select the Property that you are copying rates from
3. Select to copy the Dates only or dates and amounts
4. Press the Copy button

If the 'date range only' option was selected in step 3 above, then enter the amounts each date band.

Quote Manager - Cart Settings

Overview

Your Ciirus online booking system has an integrated shopping cart. Your guests can purchase additional items that you make available, directly from your web site. The items can be purchased at the time of booking the property.

Examples of additional items could include: ADI (accidental damage insurance), welcome packs, grocery packs, gas BBQ rental, Spa heat. You can sell (add) unlimited items.

Items can be made available on a per property basis or available for all properties. For example you only make gas BBQ available for selected properties only.

Items can be made mandatory. For example you may want to make ADI insurance a mandatory purchase at the time of booking.

Action [Quote Manager > Cart Settings](#)

To Add a new item

- press the 'Add New' button
- enter a code for your item (example: for electric BBQ you could enter ECBBQ or for accidental damage Insurance enter ADI)
(its good practice to enter your code using Uppercase letters and no special characters)
- enter a description for your item (example 'Accidental Damage Insurance')

Making a purchase Mandatory

In some cases you may want to make an item a mandatory purchase. An example could be to charge accidental damage insurance as a mandatory purchase.

- To make an item a mandatory item, Check the box 'Is this a mandatory item'

Apply to all properties

This will make the item available for all properties.

If you have an item that only applies to limited properties,

1. uncheck the tick box
2. select the property you would like the item to be available
3. press the add button
4. Repeat step 2-3 to add more properties for this item

Charge Flat Fee

To charge a one off fee for the item:

- check the 'Charge Flat Fee' tick box
- enter the amount to charge for the item

Charge Daily Fee

To charge a daily fee for the item:

- check the 'Charge Daily Fee' tick box
- enter the daily amount to charge for the item

- if a minimum fee applies enter the minimum charge for the item.
Enter 0 or blank for no minimum charge

Viewing Booked Options

You can view Booked Options from:

Bookings Manager > (click on the reservation in the list) > Expand the 'Booked Options' section

Adding an item for your guest after time of booking

To manually add an item, press the add item button and select the item from the list

please note as of version 2.625 you will need to manually add the Qty and Price for manual added items. If you have charged for this item you will need to manually update the Total amount too. We will be automating this in a later version.

Deleting an item from the booked options

To delete an item from the booked options list:

- click on the item to delete
- press the delete button
- press Yes to delete the full amount from the booking amount total