How do I manually add, edit and send an enquiry?

How do I add an enquiry via Enquiries > Add?

1. To manually place an enquiry, go to *Enquiries > Add*.

2. On this screen you should add the contact details of the person that is enquiring.

3. Add the dates of interest, number of people, and properties of interest.

4. Notes for the enquiry can be added at the bottom of the page.

We recommend you use *Enquiries > Add* when you have, for example, received a phone message and you want to log the enquiry.

How do I add an enquiry via Bookings > Grid view?

Grid view (*Bookings > Grid view*) can be used to add an enquiry if your guests have dates in mind but have not necessarily specified which property they want to stay in. It shows up all properties that are available on a single screen.

1. Go to *Bookings > Grid view*

2. From Grid view, click on the requested arrival date, and select the number of nights, number of people, then "Place enquiry".

3. On the enquiry screen add the contact details of the person that is enquiring, add the dates of interest, number of people, and properties of interest. Notes for the enquiry can be added at the bottom of the page.

4. Save.

How do I create a quote from Grid view?

1. Once the enquiry has been saved you will notice that a new section called "PDF Quotes" appears. This function allows you to create a quote to send to the guest by email. If you click on the "New Quote" button you will be directed to the availability search.

2. From the availability search you can specify the date, number of people, etc.

3. Click the "Search" button further down the page.

4. This will pull through all properties that are available for those dates and the search criteria. Once the properties display, tick which ones you would like to send in the quote. It's also possible to manually amend the price for a particular property if you wish to offer a reduced rate. If the price is reduced here, it will only show as a reduced price on this quote (i.e. it does not change anywhere on the booking calendars).

5. Once done, tick "Attach to quote" then click the "Attach to quote" link above the list of properties.

6. You will then be re-directed back into the enquiry page.

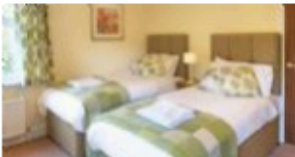**7.** Scroll down to the PDF quotes heading where you will see that there is now a PDF link to show you have generated a quote.

8. Preview what the link looks like by clicking the link. The quote pulls through a property photo, description, the price that you're offering, and a book online link. The "Book online" link allows the guest to book online via this quote.

How do I add an enquiry via Bookings > Availability search?

Another way to take an enquiry is through the Availability search.

1. Go to *Bookings > Availability search*.

2. Here you can use the calendar to search available dates, number of people, number of bedrooms, country, town, etc.

3. The search results will show up which properties are available so that you can let the customer know which properties are available on the requested dates. You need to know the dates that your guest is requesting to do the availability search. The availability search works well if you have a large number of properties (more than 15) and you want to filter availability by, for example, Country, Town or Property group.

Availability search

Please note all of the above options (*Enquiries > Add*, Grid view, or Availability search) will work to check availability, and it is really up to the individual to find their preferred way. It's always important to enter the number of people however, otherwise the low occupancy discount or per person pricing might be applied in error.

How do I create a quote from the availability search?

1. Go to *Bookings > Availability search.*

2. Here you can search for available dates.

3. Press Search.

4. To generate a quote, input a price/value corresponding with the selected property.

5. Tick "Attach to quote".

7. Then "Attach to quote" link (above the list of properties).

8. Your quote will be generated as a PDF.

Your search found 8 properties. (1.286 seconds)
HTML for customer emails   PDF for customer emails   Attach to quote   Add to special offers   ❓

Search results

ID	Property name	Town	Country/Region	Capacity	Bedrooms	Dates	Price	Short breaks allowed	Book link	☐ Attach to quote
414907	Sheneval Cottage		Dumfries and Galloway	6	0	Sat 07 Jan 2017 to Fri 03 Feb 2017	Invalid departure date		Book now	☑ 600
414907	Sheneval Cottage		Dumfries and Galloway	6	0	Sun 08 Jan 2017 to Sat 04 Feb 2017	Bookings must start on Saturday		Book now	☑ 600
414907	Sheneval Cottage		Dumfries and Galloway	6	0	Mon 09 Jan 2017 to Sun 05 Feb 2017	Bookings must start on Saturday		Book now	☐ 600
414907	Sheneval Cottage		Dumfries and Galloway	6	0	Tue 10 Jan 2017 to Mon 06 Feb 2017	Bookings must start on Saturday		Book now	☐ 600
414914	Speyside		Dumfries and Galloway	6	0	Sat 07 Jan 2017 to Fri 03 Feb 2017	Bookings must start on Friday		Book now	☑ 700

How do I edit an enquiry I have previously created?

1. Go to *Enquiries > View/Edit* and enter the date range. The default dates are set to the current month.

Search enquiries   Full Screen

Enquiry dates:	From 2020-03-01 To 2020-03-31	Arrival date requested:	[ ] 📅 Clear date
Default view:	Show the last number of days: Current month	Last name	[ ]
			Status: None
Properties of interest:	Hoose 1 - 540182 / Hoose 3 - 540204 / Hoose 5 - 548324 / Hoose Four - 540205 / Hoose Too - 540200	Custom form field	
		Website:	All
	Hold the control key and click to select multiple properties		☐ Only show unread enquiries
Owners:	Christie, Ursela / McCaig, Sarah	🖨	Filter
	Hold the control key and click to select multiple owners		

2. Select the properties that you wish to search. To select more than one property hold down the Control key. For Mac users use Command to select properties.

3. To view enquiries, based on the arrival date that the guest is interested in, select a date from the Arrival date requested field. This will show you any enquiries from guests interested in arriving on this date. You may have a specific property with availability on this date. It allows you to check if anyone has enquired, and follow up to see if they would like to place a booking.

4. You can also search for an individual enquiry by your choice of: last name, postcode, email address, telephone number, or enquiry ID. Select the relevant option from the drop down box and enter a value in the blank box.

5. It's possible to Filter your enquiries by status if you reliably maintain this information. Select the relevant status from the drop down box.

6. Press "Filter".

How do I send a quote in an enquiry email?

1. Having generated a quote (see How do I add an enquiry?), you will want to send the quote by email to the guest. At the top of the Enquiry page you have a Form letters section. From here you can select the correct letter to generate your enquiry. Make sure that Email is selected, then click the "Generate" button.

2. A preview window will appear, allowing you to preview the email before you send.

3. You have three options to choose from in how to include your quote. The first option is to attach the PDF to your email. You will find this option just above the send button at the bottom of the screen. You must tick the box *"Quote generated"* for the PDF to attach to the email.

The second option allows you to include the quotation details in the body of the email. Simply place the cursor into the email where you would like the quote to display. Click on the "Quote text" link.
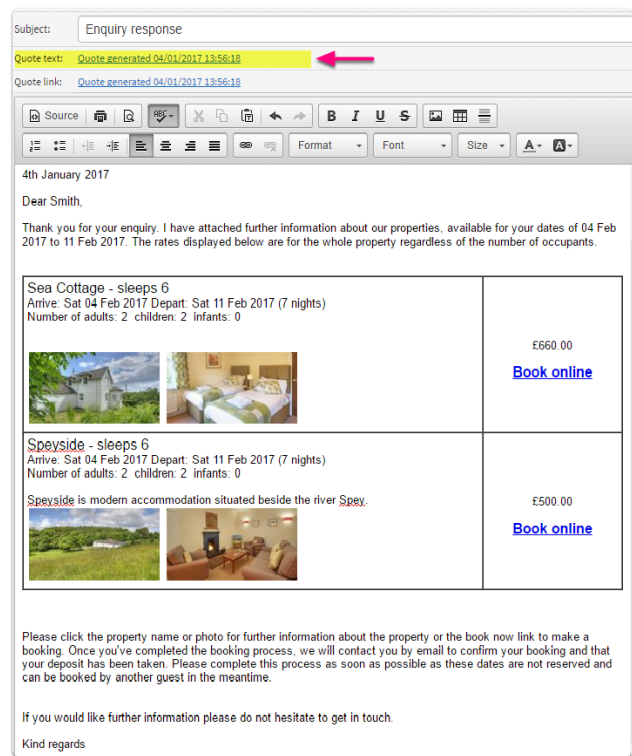
The third option allows you to insert a link into the body of the quotation email. To do this, select where you would like the link to be inserted. Choose the "Quote link" option (see below).
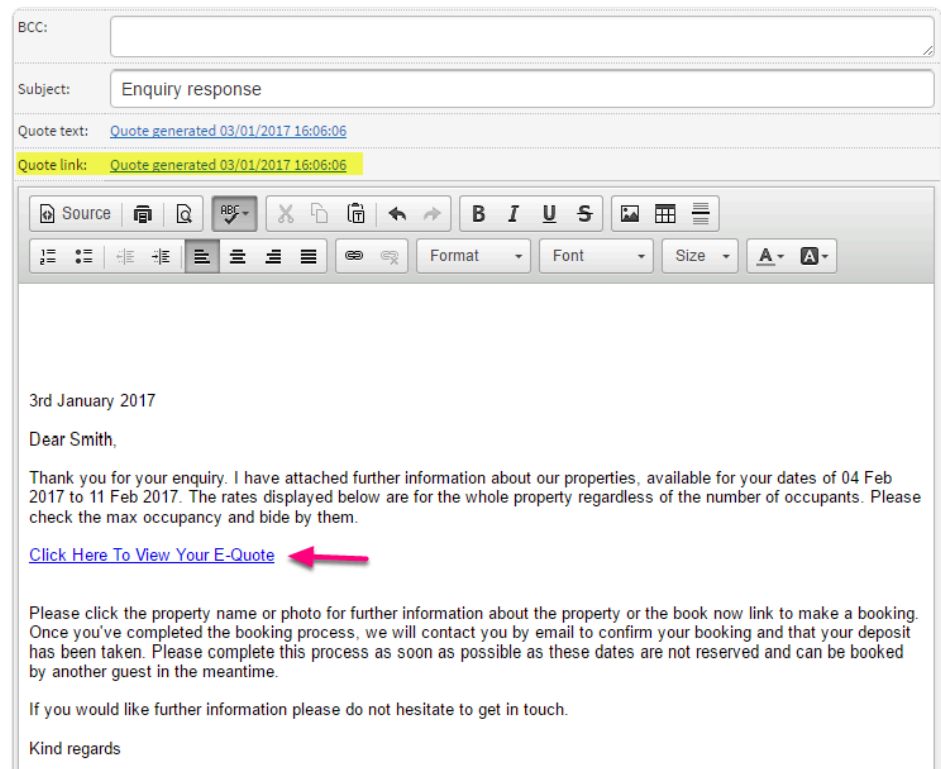
Please note the quote link is recommended as it takes the guest to a design matched page. The quotation link is also better if you are quoting for several properties.

4. Once you have chosen your preferred method, scroll to the bottom of the page and click "Send" to send the email. Any emails sent will display in the Notes section. You can refer back to this if you want to see what emails have been sent.

How do I set enquiry quotes to expire after a certain time period?

1. If you plan on sending quotes to customers you can add a time schedule in *Admin > General details.*
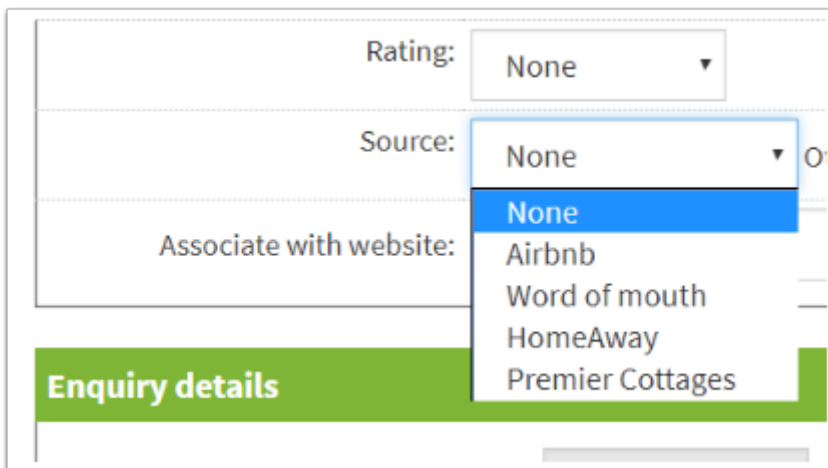
2. Scroll down to Website enquiry form options.

3. Under "PDF quotes expiry date" it shows how long you would like a quote to be left open. Choose between no expiry, one month, one week, two weeks, or one day. This encourages guests to book within the specified time before the quote expires.

4. If you type something into **"PDF quotes expiry text"**, the text will appear only if a guest tries to book after the quote has expired.

5. Click Save.
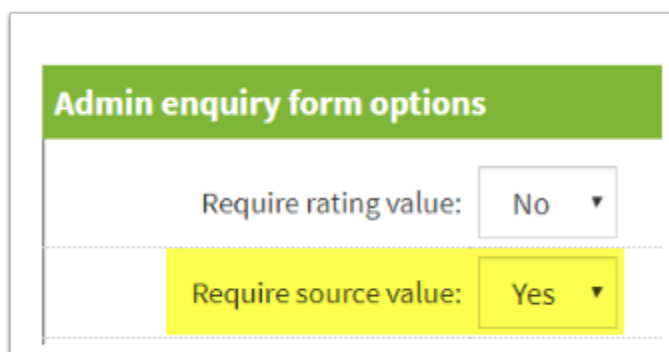
How do I add my enquiry sources?

Enquiry sources show where guests have heard about you, for example, word of mouth or any booking channels you might be advertising with. Enquiry sources are set by you and display during the booking and enquiry process. It is a great tool to make use of in SuperControl to keep track of where your bookings and enquiries come from.

1. Go to *Bookings > Booking sources.*

2. Under "Show in website booking form", select "Yes" if you want the options to show on the booking/enquiry form. If you don't want a list of sources to show on your website forms, select "No".

3. Choose "Yes" for Booking sources to be a compulsory field. If you make your sources a compulsory field on your website, guests will have to say how they found you on the enquiry form before they can book.

4. Use the "Add new" button to add new sources.

5. Whenever you enter an enquiry (Enquiries > Add), you can select your source from a drop down:

To make this field compulsory so it cannot be avoided when adding an admin enquiry go to *Admin > General details*, select the option below to Yes and Save.
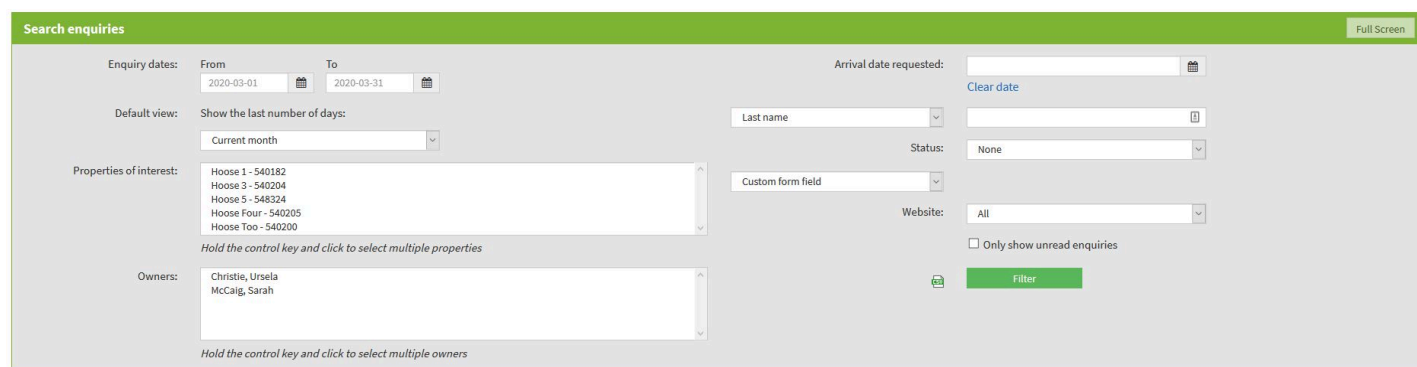
How do I search my enquiries?

1. Go to *Enquiries* > *View/Edit*. Type in a date range which could be today until the end of the month, for example. Select your properties, then press "Filter". This will bring up any enquiries associated with your property.

2. You can use the Arrival date requested calendar to search enquiries by arrival date. If you have had a cancellation, for example, you might want to view the properties that are now available on the requested arrival date.

3. Status: You can filter your enquiries by status if you reliably maintain this information. Select the relevant status from the drop down box and press "Filter". You can also filter by Custom form fields such as "pet friendly"; and it's possible to filter by Website.

0 Comments

How can I view my enquiry statistics?

> There are several reports SuperControl provide in order to track your enquiries:
>
> Enquiry stats

How do I manually add, edit and send an enquiry? **Page 11**

Enquiry stats report

Go to *Enquiries > Enquiry stats*

This gives you a bar graph showing the number of enquiries you have received by month. If you click on a coloured bar, it will give the the number of enquiries for that month.
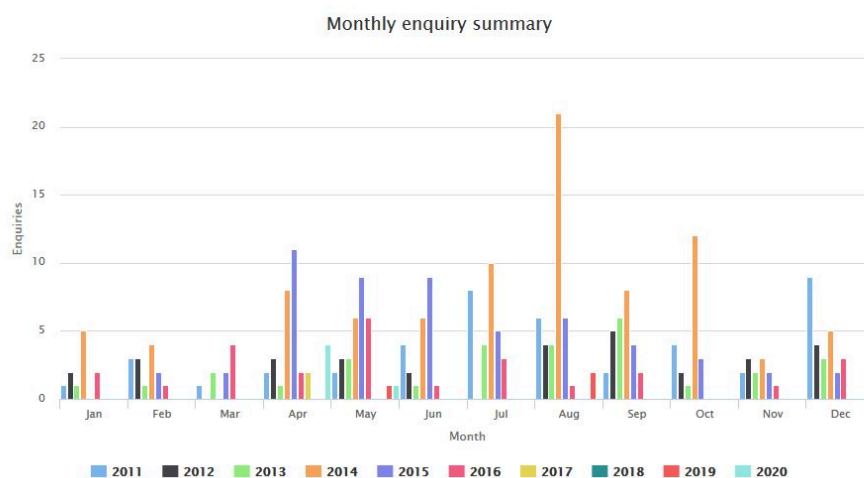
Enquiry date chart

Go to *Enquiries > Enquiry date chart*

This gives you a bar graph showing the number of enquiries you have received by month in a specified date. If you click on a coloured bar, it will give the the number of enquiries for that month.

Number of enquiries for specific dates

2011 ∨ to 2020 ∨ Go

Monthly enquiry summary

Enquiry sources

Go to *Enquiries > Enquiry sources*

This shows you a pie chart of the number of enquiries received by source. You can change the dates by click on the calendar icons at the top right and then clicking filter.

Total enquiry sources for 01 Jan 2020–31 Dec 2020
Clicking pie slice will navigate to detailed results table

Enquiry conversion

Go to *Enquiries > Enquiry conversion*

This report shows the number of enquiries per property. In some instances you will receive one enquiry for multiple properties in which case this report will return higher totals than the enquiry stats report.

You can change the dates by clicking on the calendar icons and then clicking Go.

How do I set myself a follow-up reminder in an enquiry?

1. At the bottom of the *Enquiries > Add* page you can set a follow-up action for yourself or another member of staff. Set the date for when the action has to be done plus any notes that you wish to add.

Set follow-up action ⑦

User:	User email here
Action date:	2017-02-10 📅 ⑦
Notes:	

2. You need to manually check follow-up actions as there are no reminder alerts for this. To manually check your follow-up actions, go to *Enquiries > Follow-up reminders*. Here you can check any enquiries that have been allocated to you.

Enquiry follow up

3. Click on the *Enquiry No* to get to the next screen. This is where you can generate a letter for the enquiry, send a PDF quote, or send a brochure. When you are done with following up on the enquiry, you can set the follow-up action to "Action complete".
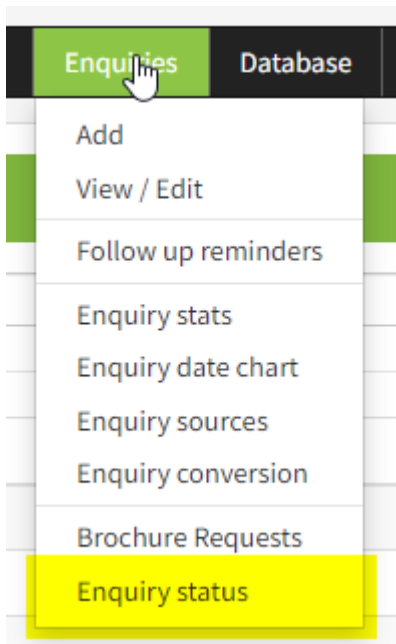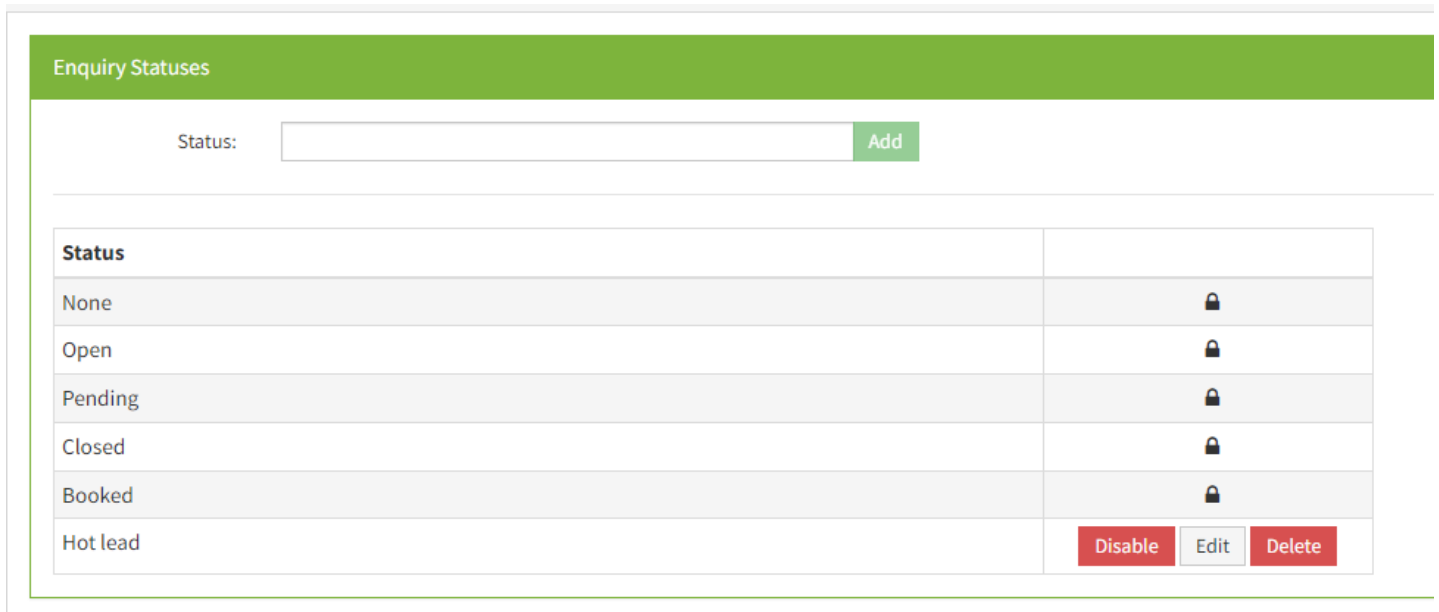

How can I Create different enquiry status options

To create additional enquiry status options go to *Enquiries > Enquiry status*

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2. From this page you will have 5 locked statuses that will be present. However, you can create additional statuses which you can choose to edit, disable or delete at any stage:

3. The locked statuses and any enabled custom statuses will then show in the various status selections for enquiries such as *Enquiries > Add, Enquiries > Edit and Enquiries > Follow up reminders*: