Quick Start Guide

# CREATING A QUOTE



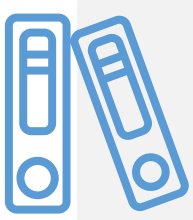

## Reservations Tab

To generate a quote or send an invoice, go to the Reservations tab and choose "Quote".

## Quotes/Invoices

Select the pink + sign in the upper right-hand corner to create a quote or invoice.



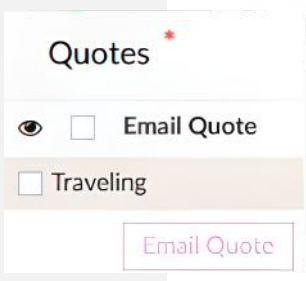


## Booking Information

Complete the basic details like reservation title, passengers, region, and start/end date.

## Email Quote

Once you've created and submitted your quote, the system will allow you to select the email option to send it to your client.




## Adding Additional Info

To edit or add to a quote (flight, cruise, tour, etc.), go to the Reservations tab, select All Reservations, find your quote by title or another identifier, then hover over it and click the ellipsis on the left side.

## Reminder Alert

When you add a payment to a quote, it will automatically convert into an invoice.

