**Rules Configuration in moonstride**

*Easily set up and manage platform-wide rules for ATOL protection, cancellations, deposits, fees, taxes, supplier payments, and promotional offers. Keeping your rules organised helps ensure sales, compliance, and customer satisfaction across your business.*

**Table of Contents**

1. Introduction
2. ATOL Rule
   * Add, Edit, Delete, and Manage ATOL Rules
3. Cancellation Rule
   * Add, Edit, Delete, and Manage Cancellation Rules
4. Deposit Rule
   * Add, Edit, Delete, and Manage Deposit Rules
5. Fees & Taxes
   * Add, Edit, Copy, Delete, Search Fees & Taxes
6. Fee & Tax Type
   * Add, Edit, Delete, and Order Types
7. Supplier Payment Rule
   * Add, Edit, Delete, Filter, and Prioritise Payment Rules
8. Promotional Code
   * Add, Edit, Copy, Delete, Use & Search Promo Codes
9. See Also

**1. Introduction**

Rules in moonstride allow you to automate crucial business processes, ensure consistent application of charges, and streamline compliance—whether for ATOL, deposits, supplier payments, taxes, or special offers. All rules are managed via the Widgets menu, making updates and reviews straightforward.

**2. ATOL Rule**

**ATOL** (Air Travel Organiser’s Licence) protection is required for many UK air package holidays. Define and manage your ATOL rules for bookings, ensuring you comply and charge the correct fees.

**Navigation:** Widgets → Rules → ATOL Rule

**Actions:**

* **Add ATOL Rule:** Click **Add**. Complete the fields (Rule Name, Service Dates, Gross/Net Charges, Priority, Supplier, Status). Save when finished.
* **Edit ATOL Rule:** Click the **Actions** gear icon and choose **Edit**. Adjust rule settings and save.
* **Delete ATOL Rule:** Click **Delete** under Actions. Confirm with OK or Cancel.
* View active, inactive, or all rules by filtering with the Status dropdown.
* **Commission Configuration:** Use the Actions menu’s “Commission Configuration” for detailed set-up.

*Insert screenshot here of ATOL Rule list and add/edit screen*

**3. Cancellation Rule**

Define your standard cancellation policies when not supplied at the service level (e.g. hotel, flight). Specify deadlines, charges, and percentages for cancellations.

**Navigation:** Widgets → Rules → Cancellation Rule

**Actions:**

* **Add Cancellation Rule:** Click **Add**. Fill in Rule Name, Date Range, Cancellation Value (percentage/fixed). Save.
* **Edit/Update:** Choose **Edit** from Actions to change existing rules.
* **Delete:** Use Actions > Delete and confirm the prompt.
* Use the Status filter to display active, inactive, or all rules.

*(Example: "Cancellation within 29 days before travel: 100% of paid amount will be retained.")*

**4. Deposit Rule**

Deposits are often required to secure bookings and can be set as fixed amounts or percentages. These rules ensure deposits are applied correctly, service-by-service or supplier-by-supplier.

**Navigation:** Widgets → Rules → Deposit Rule

**Actions:**

* **Add Deposit Rule:** Click **Add**. Complete all relevant fields: Rule Name, Deposit For, Sell Channel, Calculation Method, Value Type, Days Before Travel, Supplier, Agent, Services Type, Status. Save when ready.
  + For supplier-specific deposits, select supplier/services while setting up.
  + For general booking deposits, leave supplier blank.
* **Edit/Update:** Click Actions > Edit. Make changes as needed.
* **Delete:** Select Actions > Delete and confirm.
* Filter to show only active/inactive rules if desired.

*Insert screenshot here of Deposit Rule add/edit screen*

**5. Fees & Taxes**

Configure any extra charges or taxes for customers here, ensuring pricing is always consistent and compliant.

**Navigation:** Widgets → Rules → Fees & Taxes

**Actions:**

* **Add Fees & Taxes:** Click **Add**. Set Name, Charge Type, Fee/Tax Type, Calculation Type, Applicable On, Supplier/Agent/Location, Components, Tax Type, Sell Channel, Visibility, Value Types, Supplier/Customer Values, Markup/Commission, Date Ranges, and more. Save.
* **Edit/Update:** Select Actions > Edit.
* **Copy Rule:** Use Actions > Copy to quickly duplicate and adjust similar fees/taxes.
* **Delete Rule:** Actions > Delete. Confirm your choice.
* **Search/Filter:** Use the Filter button for advanced searches. Clear Cache using the Action button, if needed.
* Add as service sub line-item or to service amount.
* *Insert screenshot here of Fees & Taxes rule and add/edit screens*

**6. Fee & Tax Type**

Define standard fee and tax types for consistent use in Fees & Taxes rules across your platform.

**Navigation:** Widgets → Rules → Fee & Tax Type

**Actions:**

* **Add Fee & Tax Type:** Click **Add**. Fill in Name, Description, and assign a Code. Save.
* **Edit/Update:** Actions > Edit.
* **Delete:** Actions > Delete. Confirm as required.
* **Search/Filter:** Use Filter to find types quickly.
* **Save Sequence:** Click to reorder how types appear in menus.

**7. Supplier Payment Rule**

Set deadlines for supplier deposits and balance payments, controlling cash flow and compliance with supplier contracts.

**Navigation:** Widgets → Rules → Supplier Payment Rule

**Actions:**

* **Add Payment Rule:** Click **Add**. Enter Rule Name, Sell Channel, Supplier, Services, Booking & Travel Dates, Priorities, Status, Deposit Type/Value, Deposit Payment and Balance Payment Due Dates. Save once complete.
* **Edit/Update:** Actions > Edit.
* **Delete:** Actions > Delete, confirm to proceed.
* Use the **Resequence Column** button to arrange, show, or hide columns in the listing.
  + *Insert screenshot here of Resequence Column and main filter controls*
* **Filter:** Search rules by booking date, travel date, service, supplier, and status.
* **Status:** Toggle rules active/inactive.
* **Clear Cache:** Use Action > Clear Cache to refresh or delete outdated rule data.
* **Save Priority:** Adjust and save rule prioritisation for overlapping rules.

**8. Promotional Code**

Create and manage promotional codes to offer discounts or incentives at the quote or booking stage, with full control over usage limits, parameters, and eligible services/customers.

**Navigation:** Widgets → Rules → Promotional Code

**Actions:**

* **Add Promo Code:** Click **Add** and complete all fields—Code, Display Name, Usage Limit, Description, applicable sell channels/customers/services, validity dates, travel duration, departure/destination airport, airline, passenger range, promotion/discount type, value, account type, and tax rate. Save.
* **Edit/Update:** Actions > Edit to update an existing code.
* **Copy:** Actions > Copy to duplicate and edit.
* **Delete:** Actions > Delete to remove.
* **Search/Filter:** Use criteria for fast retrieval.

Promo codes can be applied at the quote or booking stage, provided all criteria are met.

**9. See Also**

* [Supplier & Contract Configuration](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)
* [Applying Rules to Bookings](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)
* [Fees & Taxes Best Practices](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)
* [Discount & Promotion Campaigns](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)