**CRM Settings**

*Configure every aspect of your moonstride CRM environment, from dashboards and reports to records management, automation, compliance, and workflow controls. This guide explains each setting as it appears, so you can tailor your system to your exact business requirements.*

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**Dashboard**

Navigate to **Administrator > Settings > CRM Setting > Dashboard** to customise how statistics and recent activities display.

**Current Month Statistics**

Decide if the dashboard should show data from only the current month or from all months.

* **Statistic View:** Select "Current month" or "All" for summary figures in the dashboard.
* **Default Count for Top Listing:** Set the default number (X) of Customers, Enquiries, Quotations, Bookings, and Messages to list.
* **Default Last Number of Days:** Set how many recent days (X) to show listings for dashboard modules.

**Sales and Profit Calculations**

Allow dashboard profit and sales stats to be calculated by selected booking status.

* **Sales and Profit to be calculated on:** Choose which booking statuses are counted toward "Total Profit." Click **Save** to apply.

**Recent Customer/Enquiry/Quotation/Booking/Email Dashboard**

Enable or disable which recent record panels (Customers, Enquiries, Quotations, Bookings, Emails, Bookings by Travel Date) appear as rapid-access tabs on your dashboard.

**Dashboard Showing Statistics by Departure Date**

**Enable statistics by Departure Date for quotation and booking:** Show dashboard statistics based on the departure date instead of booking/quotation date.

**Goal Statistics**

**Enable Goal Statistics:** Toggle to display users' goal stats, and filter/customise displays as required in dashboard graphs.

**Statistics (Default- Booking)**

Set the default dashboard statistics tab — usually Booking, but you may set to Enquiry or Quotation as preferred. You may also select if the statistics is visible is related to all users or logged in user only.

**Enquiry Statistics**

Toggle and filter enquiry-related statistics.

* **Enable Enquiry Statistics:** Show/hide this stat module.
* **Enquiry By:** Show only your own, or all team members’ enquiries.
* **View By:** Display by day, week, or month.
* **Select Month:** Display for current or all months.
* **Chart Type:** Select line or bar chart.
* **Enquiry Status:** Choose which statuses to count for stats.

**Quotation Statistics**

Toggle and filter quotation-related statistics.

* **Enable Quotation Statistics**
* **Quotation By**
* **View By**
* **Select Month**
* **Chart Type**
* **Quotation Status**

**Booking Statistics**

Toggle and filter booking-related statistics.

* **Enable Booking Statistics**
* **Booking By**
* **View By**
* **Select Month**
* **Chart Type**
* **Booking Status**

**Default Active Tab for Recent Customer/Enquiry/Quotation/Booking/Email**

Set which recent record tab opens by default on the dashboard.

**Bookings / Travels Departing Soon**

Configure lists for past and future bookings within specified "departed" or "departing in next X days" windows.

* **Bookings Recently Departed / Departing In Next** – Number of days for each.
* **Booking Status** – Only show bookings with selected statuses.

**Booking / Travels Ending Soon**

Set up which bookings and travels ending soon are shown (arrived within or arriving in the next X days).

* **Bookings Recently Arrived/Arriving In Next**
* **Booking Status** – Filter bookings by their status.

**Customer Payment Due**

List all customer payment dues in the dashboard for bookings due/overdue within X days.

* **Customer Payment Overdue**
* **Customer Payment Due in Next**
* **Booking Status**

**Installment Payment Due**

Configure installment payment dues shown for bookings departing in the next X days.

* **Installment Payment Overdue**
* **Installment Payment Due in Next**
* **Booking Status**
* **Installment Status**

**Enquiry Follow Up**

Track enquiry follow-ups based on pipeline stage and status.

* **Enquiry Follow Up Overdue**
* **Enquiry Follow Up in Nextspan**
* **Pipeline stage**
* **Enquiry Status**

**Quotation Recently Expired**

Set how many days to display recently expired or expiring soon quotations; filter by pipeline stage.

* **Quotation Recently Expired**
* **Quotation Expiry in Next**
* **Pipeline Stage**

**Supplier Payment Due**

Configure and filter the view of supplier payments due/overdue and which booking status are to be considered.

**Supplier Deposit Due**

Configure and filter the view of supplier deposit due/overdue and which booking status are to be considered.

**Task List**

Control dashboard appearance and sorting of user task lists.

* Sort/filter by start/end date, priority, status.

**Enable Add Widget**

Allow the dashboard to be edited (add/remove, reorder widgets from “Edit Dashboard”).

**Ticketing Deadline Due**

Configure booking reminders for ticketing deadlines in X days.

**Customer Configuration**

Control how customer details behave by default.

* **Mark as Lead Passenger by Default:** If enabled, newly created quotations or bookings auto-select the customer as the lead passenger.
* **Default Marketing Preferences:** Select your default marketing preferences from Email, SMS and Postal.

**Enquiry Configuration**

Manage the enquiry title format and enable dynamic creation using tags, so titles are generated automatically if not entered manually.

Select which enquiry statuses are to be considered for pipeline view.

**Quotation Configuration**

Control default expiration, automatic status update, visible statuses, and hotel address fields in quotations.

**Booking Configuration**

Set the defaults for booking status, user (created by, assigned to), sales type (CRM/B2C), passenger allocation, payment terms visibility, payment T&C modification, pricing markup logic, and how passenger age is calculated.

**Add New Quotation / Booking Configuration**

Configure which sections and behaviours are available in new quotations/bookings.

* Toggle display of Agent/Customer/Passenger field groups
* Enable “Customer Same as Agent”
* Set default for traveller’s age/DOB fields
* Make departure date field mandatory or optional

**Service Configuration**

For each service (Flight, Transfer, Vehicle Hire, Tour, Insurance, Hotel, Add-Ons, All Service), configure:

* Which details or fields are required (baggage, policy, address, rating, board basis, pick-up/drop-off)
* Default service methods (Manual/Search)
* Whether aspects like time, country, code, additions, images, and calculations are set or optional
* Detail options (text, images, codes)
* Defaults for selections, durations, or utility settings

**Customer Balance Due Date Configuration**

Set defaults for balance due period, supplier-linked updates, and customer message text regarding payment due dates.

**Supplier Payment Due Date Configuration**

Set how many days from booking, which offset rules to apply, notification days, and default messages for supplier payment notifications.

**Voucher Configuration**

Choose which data fields/components to show in vouchers and itinerary documents, including:

* Hotel policies
* ATOL/ABTOT/ABTA messages and defaults
* Images and detail fields
* Customer, invoice, transfer, and supplier information
* T&Cs, display paid amount, cancellation/free cancellation visibility

**Invoice Configuration**

Set up invoice number prefix, branding, auto sales invoice generation, default pricing structure, and payment reference requirements for all invoices.

**Itinerary**

Set whether all or default images appear in the itinerary for hotels/tours.

**Display Canceled Services In Cancellation Invoice**

Configure whether cancelled services (Flights, Hotels, Transfers, Vehicle Hire, Tour/Activity, Add-Ons, Insurance, Cruise, etc.) are shown on cancellation invoices.

**Report**

Select which booking statuses must be present for the Passenger List report display logic.

**Data Visibility**

Control whether details for Customer, Enquiry, Quotation/Booking, and Agent are **Public** (all users) or **Shared** (only shared users and system admin).

**GDPR Configuration**

Cover data privacy settings for:

* Recognising/allowing or whitelisting unknown IPs
* Bulk export of PII (password-enable)
* Data masking toggle and automatic masking period

**Two Factor Authentication**

Enable/disable and set expiry (in days) for two-factor authentication on CRM, Customer Portal, and Supplier Confirmation logins.

**Terms & Conditions And Privacy Policy Configuration**

Fine-tune how T&Cs and Privacy Policy are shared and accepted:

* Enable T&Cs on Bookings, Shared Itinerary, or Email A Quote
* Configure acceptance text for T&C pages
* Require T&C acceptance during customer/passenger registration and show text in the B2C/portal payment page
* Set or update the Privacy Policy display for customer-facing documents and portals

**Manage Tour Configuration**

Enable or disable display of Tour Detail and Tour Booking URL in Manage Tour and Fix Departure screens.

**Manage Exchange Rate**

Set the default currency exchange rate behaviour when converting a Quote to Booking or when updating Booking Details.

**Task**

Enable or disable advance task notifications to users X days before the task’s due date.

**Manage Notes**

Configure which 'Note Types' are selectable and visible to various users, such as homeworkers or staff, during quotation and booking.

* Select defaults for the ‘Manage Notes’ screen as needed

**Quick Quote Configuration**

Enable or disable these search shortcuts:

* **Quick Hotel Search in Existing Quotation / Booking**
* **Quick Flight Search in Existing Quotation / Booking**
* **Quick Package Search in Existing Quotation / Booking**
* **Quick Tour Search in Existing Quotation / Booking**
* Set the default and flight default view (Detail or Compact) for Quick Quote

**Commission Calculation Configuration**

Set whether the system calculates flight commission based on total amount or solely on base fare plus markup.

**Summary**

This CRM Settings guide is designed for ease of reference and direct alignment to your moonstride interface. Follow each setting as listed for seamless platform administration and customisation.