**Configuring Automated Email Notifications in moonstride**

*Automated notifications help you keep customers, agents and contacts up to date—no manual effort needed. With moonstride, set up notifications to send reminders or important messages exactly when they’re needed, such as before balance payments, birthdays or travel dates.*

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**1. Introduction**

The Automated Notification feature in moonstride allows you to set up and manage email messages that are triggered automatically based on events and timing around bookings, payments, or travel milestones. This is ideal for reminding customers (or their agents) to make payments, prepare for travel, or even send special messages before birthdays—helping you deliver a seamless customer experience.

**Note:** This module is specifically for automated customer/agent notifications. For internal user tasks and enquiry follow-up, use the dedicated Task Allocation and Enquiry Follow-up modules.

**2. Accessing the Automated Notification Module**

**Navigation:** Go to **Widgets > Widget > Email & Notification > Automated Notifications** in your main navigation menu.

*Insert screenshot here of the Automated Notification listing screen.*

**3. How Automated Notification Rules Work**

Automated notifications in moonstride are based on clear trigger rules that determine when (before or after a particular date or event) a message should be sent. You can choose from the following rules:

* After Booking Date
* Before or After Balance Due Date
* Before or After Travel Start Date
* After Travel End Date
* Before Birthday
* Before or After Installment Due Date
* Before or After Ticketing Deadline
* Before or After Supplier Balance Payment Due Date
* Before or After Supplier Deposit Payment Due Date
* Before or After Supplier Invoice Payment Due Date

For each rule, you’ll set the notification to go out a certain number of days before or after the event (offset).

*Insert screenshot here showing the Rule selection dropdown as provided above.*

**4. Adding a New Automated Notification**

To configure a new automated notification:

1. Click **Add** on the Automated Notification screen.
2. Complete the fields:
   * **Name:** Enter a descriptive name for your notification.
   * **From:** Choose the sender's email address.
   * **Code:** Assign a unique identifier for this rule.
   * **Rule:** Select from the rules above, and set the offset (how many days before or after the chosen event).
   * **CC / BCC:** Add extra recipients as needed.
   * **Subject:** Craft a subject line; you can use placeholders (tags) for personalisation.
   * **Sell Channel:** Specify the relevant brand or channel if using multi-brand/Sell Channel functionality.
   * **Status:** Set as active or inactive.
   * **Email Content:** Write the body of your email using available tags (like [#LEADPASSENGERNAME#], [#PAYMENTLINK#]). These tags allow dynamic, context-based notifications with full booking details.
3. Click **Save** to enable the notification.

*Insert screenshot here of the Add/Edit Automated Notification form with emphasis on Rule selection and Content fields.*

**5. Editing Automated Notifications**

To update an existing automated notification:

* In the Automated Notification list, click the **Actions** gear icon next to the relevant rule.
* Select **Edit**.
* Adjust the notification details as needed and click **Save**.

**6. Including Payment Links in Notifications**

If you wish to allow customers to pay directly through a notification:

* Use the [#PAYMENTLINK#] tag in your email content.
* This generates a secure, customer-specific payment link (requires your moonstride platform to have an active Payment Gateway integration).
* Example: To send a payment link 7 days before the balance due date, set up a notification using the “Before Balance Due Date” rule with a 7-day offset, and include [#PAYMENTLINK#] in the message.

*Insert screenshot here with [#PAYMENTLINK#] in use in the email content template.*

**7. Deleting Automated Notifications**

To remove a notification:

* In the Automated Notification list, click the **Actions** gear icon and then **Delete**.
* Confirm your choice in the pop-up dialog box (OK/Cancel) to proceed.

**8. Sequencing Notifications**

You can control the order that notifications are checked and sent:

* Enter a sequence number for each notification on the main screen.
* Click **Save Sequence** to confirm.
* Notifications with lower sequence numbers will be triggered first if multiple could go out at the same time.

**Tip:** Use the Status filter to quickly show active, inactive, or all your notifications.

**9. Viewing Notification History**

To review which notifications have been sent:

* Access **Automated Notification History** via the menu.
* See a complete record of all automated notifications issued by your platform for bookings, payments, etc.

*Insert screenshot here of Automated Notification History screen.*

**10. See Also**

* [Payment Gateway Integration](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)
* [Setting Up Email Templates](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)
* [Task Allocation & Internal Assignment](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)
* [User & Team Notifications](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)

**Summary**

Automated notifications in moonstride help you deliver proactive, relevant communication to your customers and agents—before, during, and after every booking. If you need help configuring complex rules or message content, contact our support team for expert guidance.