**Configuring Service Categories and Service Types in moonstride**

*Manage your business’s key service offerings in moonstride by defining categories and service types. Organise and display services clearly for your team and clients throughout the booking journey.*

**Table of Contents**

1. Introduction
2. Categories
   * Viewing and Accessing Categories
   * Adding a Category
   * Editing a Category
3. Service Types
   * Viewing and Accessing Service Types
   * Adding a Service Type
   * Example: Associated Service Types in Use
   * Editing a Service Type
   * Deleting a Service Type
   * Additional Actions and Sorting
4. See Also

**1. Introduction**

In moonstride, service configuration is managed through **Categories** (basic service groupings, like Hotel, Flight, and Transfer) and **Service Types** (additional options linked to these categories). These make the booking process flexible and tailored to your business model.

**2. Categories**

**Viewing and Accessing Categories**

Categories are used to organise your main services, displayed as tabs when adding services to a booking.

**Navigation:** Go to **Widgets → Widget → Category**.

*Insert screenshot here of the Category listing screen*

**Adding a Category**

To add a new category:

1. Click the **Add** button at the top right of the Category screen. *Insert screenshot here highlighting the Add button*
2. On the "Category - Add" screen, complete the following fields:
   * **Name:** Enter the category name (e.g. "Hotel", "Flight").
   * **Description:** Optionally, add a short description.
   * **Status:** Select whether the category is Active or Inactive. *Insert screenshot here of the Category - Add form*
3. Click **Save**.

**Editing a Category**

To update the details of an existing category:

1. In the Category listing, click the **Actions** gear icon for the relevant category and select **Edit**. *Insert screenshot here showing where to find the Edit option*
2. Make your changes and click **Save**.

*Tip: You can display all, only active, or only inactive categories using the status filter at the top of the screen.*

**3. Service Types**

Service Types let you define specific offerings linked to your main service categories (for example, “Service Tax for the Year 2023” linked to “Flight”).

**Viewing and Accessing Service Types**

**Navigation:** Go to **Widgets → Widget → Service Type**.

*Insert screenshot here showing the Service Type listing screen*

You can view, filter by status (Active, Inactive, All), and see details such as code, category, tax details, and sort order.

**Adding a Service Type**

To add a new service type:

1. Click the **Add** button at the top right of the Service Type listing screen. *Insert screenshot here highlighting the Add button*
2. On the "Service Type - Add" screen, fill in:
   * **Service Type Code:** A short code for this type.
   * **Name:** The service type name.
   * **Service:** Select the associated main service category.
   * **Auto Generate Line-Item:** Choose whether this line item should be generated automatically when its parent service is added.
   * **Purchase Setting:** Enter details such as purchase account, purchase tax rate, and purchase description if required.
   * **Sales Setting:** Enter sales account, sales tax rate, and description for sales data. *Insert screenshot here of the Service Type - Add form*
3. Click **Save**.

**Example: Associated Service Types in Use**

When a primary service (such as "Flight") is added, all associated service types (e.g., "Service Tax for the Year 2023") will appear as additional line items.

*Insert screenshot here of Flights service screen showing both main and associated service types listed as line items below*

For example, in the Flights view:

* The main service type "Flight" is listed first.
* Additional service types like "Service Tax for the Year 2023" can be automatically added as further line items.

This ensures no required charges or services are missed during booking.

**Editing a Service Type**

* In the Service Type listing, use the **Actions** gear icon next to a service type and select **Edit**. *Insert screenshot here showing the Edit option within the Service Type listing*
* Update the fields as needed and click **Save**.

**Deleting a Service Type**

* In the Service Type listing, click the **Actions** gear icon and select **Delete**.
* Confirm the deletion in the alert dialog to remove the service type.

**Additional Actions and Sorting**

* **Filter by Status:** Select Active, Inactive, or All service types for easier management.
* **Clear Cache:** Click the **Clear Cache** button (top right) if you need to refresh system data.
* **Sort Order:** Change the order in which service types appear by entering a number in the **Sort Order** column and clicking **Save Sequence** (top right).

*Insert screenshot here showing Save Sequence option and the Sort Order column*

**4. See Also**

* [Supplier and Contract Management](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)
* [Configuring Tax and Pricing Rules](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)
* [Customising Booking Workflows](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)

**Summary**

Defining categories and service types in moonstride ensures your services are always accurately structured—making bookings, tax calculations, and reporting much more straightforward. For more information or advanced setup, consult our full help centre or contact support.