**Creating a New Customer / Passenger in moonstride**

*Add, manage, and maintain complete customer and passenger records for every enquiry, quotation, and booking—ensuring all details are current, accessible, and collaboration-ready throughout your workflow.*

**Table of Contents**

1. Creating a New Customer Overview
2. Add Customer
   * Add Primary Details
   * Visibility Details
   * Add Contact
   * Add Address
   * Add Passengers
   * Documents
   * Notes
   * Manage Account & Tax
   * Credit Balance
3. Search Customer
4. See Also

**1. Creating a New Customer Overview**

A **customer** in moonstride is someone who enquires, requests a quote, or books services offered by your business. Customers are the main point of contact for all communications, documents, and transactions—but not all customers need to be travellers (passengers).

You can add, view, and manage customer records from the **Customer List** or the **Add New Customer** screen.

**Navigation:** CRM → Customer → Customer List

[Insert screenshot here: Customer List screen, Add New Customer button highlighted.]

**2. Add Customer**

Click **Add** in the Customer List or navigate to **CRM → Customer → Add New Customer**.

**Customers can be created in three main ways:**

* Add a new customer using the dedicated Add screen.
* Import customers in bulk from external data files.
* Add a customer while creating a new enquiry, quotation, or booking.

**Duplication is reduced**:

* Every customer profile automatically generates a matching passenger profile.
* Edits to a customer update the linked passenger (and vice versa).
* Any changes are instantly reflected in all bookings linked to those customer/passenger records.
* Customers/passengers can update their details for a specific booking, directly through the customer portal.

**Add Primary Details**

Fill in these fields on the **Primary Details** page:

* **Customer Type:** Select Individual or Corporate
* **Title, First Name (mandatory), Middle Name, Last Name, Chosen Name, Gender:** Capture full personal/profile details
* **Email:** Essential for communication, auto-filled later for emails
* **Currency:** The customer's preferred currency for all transactions

Optional fields include Date of Birth, Anniversary, Marketing Preferences, Preferred Destination, and Blacklisting (if needed).

[Insert screenshot here: Add New Customer, Primary Details tab]

**Visibility Details**

* **Assign To:** Assign the customer to a specific staff user for account management.
* **Visibility:**
  + **Public:** All users can access and see details for this customer.
  + **Shared:** Only the users you specify will have access to this customer’s information.

[Insert screenshot here: Visibility details section]

**Add Contact**

After saving primary details, click "Save and Add Other Info" to add additional contacts:

* **Type:** Define the type of contact (e.g., Main, Emergency, Billing).
* Enter phone, mobile, email, or alternative details as appropriate.

[Insert screenshot here: Add Contact modal or tab listing]

**Add Address**

Go to the **Address** tab to add one or more addresses for the customer.

* Add as many address types as you need (e.g., Home, Work, Billing).
* Edit or delete addresses at any time.

[Insert screenshot here: Address tab, Add Address panel]

**Add Passengers**

Open the **Passengers** tab to add as many linked travellers as necessary.

* By default, every customer is also a passenger.
* Import or add passengers directly; or add new ones later when creating a booking or quotation.

**Personal Details, Passport Details, Preferences, Emergency Contacts**—all can be managed for each passenger.

[Insert screenshot here: Passengers tab, Add Passenger form]

* Edits or deletions are reflected in all bookings tied to that customer/passenger.

**Documents**

Upload, manage, and store unlimited documents for each customer.

* **Document Name:** Label each file clearly
* **Document:** File upload
* **Description:** Optional short note

View, edit, delete, or download documents as required.

[Insert screenshot here: Documents tab, document list]

**Notes**

Add, review, or delete notes relevant to the customer.

* **Note Type:** Pick from existing types (Internal, Supplier, Special Request, etc.)
* **Title:** Short, clear heading
* **Description:** Key details
* **Shown On:** Choose where the note is displayed (Invoice, Voucher, Notification, etc.)

[Insert screenshot here: Notes tab, Add Note form]

**Manage Account & Tax**

Enter accounting and tax details as needed for corporate or regular clients.

[Insert screenshot here: Account & Tax tab or fields]

**Credit Balance**

* Track any credit or debit transactions for the customer.
* Record **Type** (Credit/Debit), **Amount** (matches customer’s currency), and **Notes** (short description).
* View all entries chronologically.

[Insert screenshot here: Credit Balance tab with transaction list]

**3. Search Customer**

Find customers quickly via:

* **Filter:** Click the Filter button at top left of the Customer List and search by name, contact, currency, etc.
* **Alphabetical quick search:** Click any initial letter (A–Z) to show all customers whose name begins with that letter.

[Insert screenshot here: Customer List filter bar and alphabetical search]

**4. See Also**

* [Adding and Managing Passengers](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)
* [Customer Portal Setup and Self-Service](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)
* [Customer Visibility & Assignment Options](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)
* [Reporting and Segmentation](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)

**Summary**

moonstride provides a thorough, streamlined process to create and manage customer and passenger records, tie them to every stage of your workflow, and ensure your data stays current, accurate, and accessible.