**Creating a New Quotation in moonstride**

*Easily generate and manage detailed, professional quotes for flights, hotels, packages, transfers, and more. With multiple ways to add quotations and extensive quoting options, moonstride streamlines your lead-to-booking workflow.*

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**1. Creating a New Quotation**

In moonstride, quotations can be added, viewed, and updated from the **Quotation List**. Services such as flights, accommodation, transfers, and tours may be added to quotes for individual or group customers.

**Ways to create a new quotation:**

* **Convert an Enquiry to Quote:** From the enquiry list (**CRM → Enquiry → Enquiry List**), click the **Actions** button and select **Create New Quote** next to any enquiry.

Alternatively, add a new quotation while adding a new enquiry by using the **Add Quotation** button at the bottom right of the screen.

* **Add New Quotation Directly:** Go to **CRM → Quotation → Add New Quotation** or use **Add** in the Quotation List.
* **Dynamic Package Search & Quote:** Use this tool to build a custom package and quote live, step by step.

**2. Re-sequence Columns in Quotation Details**

Columns in the quotation list can be rearranged for your preferred workflow. Click the column selector in the top right of the table header row to manage which details show and their sequence.

*Insert screenshot here showing the column selector used to re-sequence columns.*

**3. Add New Quotation**

Clicking the **Add** button on the quotation list opens a new quotation form.

**Overview of Primary Details**

The Primary Details section collects key initial information:

* **Enquiry Ref No.:** Link the quote to an existing enquiry (auto-suggests after typing three letters).
* **Title:** Custom title for the quotation.
* **Pipeline Stage:** Assign a sales stage to track progress.
* **Source of Enquiry:** Track the origin of the request.
* **Travel Date / Departure Date:** Enter planned travel and departure dates.
* **No. Of Nights**: Enter number of nights for travel.
* **Purpose of Travel, Category:** Define business or leisure, and packaging type.
* **Currency, Sell Channel, Language:** Set client preferences for currency, brand, and document language.
* **Internal Reference Number:** Track internal reference if needed.
* **Travelers' Count, Age/Date of Birth:** Log the numbers and profile of all passengers.
* **Visibility Details:**
  + **Assign To:** Responsible team member.
  + **Visibility:** Choose Public (all users) or Shared (specified users only).
* **Manage Tags / Notes:** Optionally associate tags and notes for easier management and filtering.

All details entered in Primary Details are carried into quotations, and (if quoting from an enquiry) fields are auto-filled but remain editable.

**Linking to Existing Enquiries**

If you wish to connect your new quotation to an existing enquiry:

* Enter three letters of the enquiry ref no. in Primary Details—system will suggest matches.
* Select a result—details from that enquiry auto-populate into your quotation.
* Edit fields as required.

**Additional Quotation Sections**

* **Agent Details:** Select or edit agents and agent users. Set up communication, price bands, and relevant agency data.
* **Customer Details:** Add/select a customer, fill in contact/address, review activity history, manage portal invitations.
* **Terms & Conditions:** Attach, view, or edit T&Cs for this specific quote.
* **Email Quote:** Quickly generate and send your quote document via email:
  + Choose recipient (customer/agent), branding, template, service order, pricing structure, passenger details, and service descriptions.
  + Edit the cover letter using a rich text editor.
  + Download PDFs or send to clients directly.

*Insert screenshot here showing the Email a Quote Screen..*

**4. Search/Filter Quotations**

Powerful filters let you find quotes by nearly any field:

* Reference No., Booking/Created/Travel/Balance Due Dates, Sell Channel, Tags, Supplier Status, Currency, Customer details, Supplier, Status, Category, PNR No., Agents/Agent Users, Created By, Assigned To, Shared With, Pipeline Stage, Expiry Date, Services, search text (e.g. internal reference), Show Enquiry Title checkbox.

*Insert screenshot here showing the filter/search bar.*

**5. Export To Excel**

Export your full, filtered list of quotations to Excel using the "Export To Excel" button on the top right of the Quotation List screen for reporting, analysis, or offline use.

**6. Convert to Booking**

Quotes can be converted to bookings with a single click:

* Use the **Convert to Booking** option in the quote edit screen.
* Booking and original enquiry reference numbers remain accessible as clickable links.

*Insert screenshot here of the Convert to Booking button and references.*

**7. Reverify & Confirm Price**

The **Reverify & Confirm Price** action let you verify all third-party supplier service confirmations before booking and ensures the latest, accurate prices just before conversion.

* Opens *Supplier Reference* to cross-check service status and prices.
* Use this before converting to stay updated if there’s a time gap between quoting and booking.

**8. Email Quote**

Send the official quotation to agents or clients by clicking the **Email Quote** button on the quotation details screen. Choose document template, branding, structure, cover letter, and included fields.

**9. Group Booking Settings**

Accessed from the Actions button at the top right, *Group Booking Settings* lets you manage access control for invitees/passengers and organisers in the customer portal:

* Grant or restrict quote acceptance/editing, payment, and passenger management.

*Insert screenshot here of the Group Booking Settings.*

**10. Print**

Generate a PDF of your quotation with desired details and formatting for physical records or offline sharing.

*Insert screenshot here of Print options.*

**11. Recalculate Agent Mark-Up / Commission**

Use this feature to ensure mark-ups and commissions stay accurate when:

* **Changing the agent:** Updates the mark-up/commission for a new agent’s settings.
* **Switching price bands:** Applies the latest mark-up/commission from a different price band.
* **Updating agent or supplier after copying a quote:** Ensures all calculations match for the new agent or context.
* **After modifying commission rules:** Reflects the latest policies or changes in your agency’s commission structure.
* **When exchange rates, supplier, or service costs change:** Keeps agent-related amounts current with new costs or rates.

**12. Recalculate Agent Commission Only**

Specifically update the agent commission within the quotation, without changing mark-ups.

**13. Recalculate Supplier Commission**

Refresh supplier commission calculations if post-quote changes have occurred.

**14. Share Itinerary Link**

Send a link for clients to view their itinerary online with a configurable, branded email (feature available in moonstride PRO).

**15. Update Exchange Rate**

If exchange rates change, update them in the quotation and recalculate all totals using this option. All pricing adjusts instantly.

**16. Copy Quote**

Duplicate the current quote quickly (without returning to the list) for identical or similar bookings.

**17. See Also**

* [Managing Quotation](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)
* [Dynamic Package Search & Quote](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)
* [Manage Passengers and Services](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)
* [Email and Branding Templates](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)
* [Quotation Lifecycle Management](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)

**Summary**

moonstride’s quotation tools give your team total flexibility, automation, and control at every step. Create, send, convert, or export quotations in seconds—always with updated commission, mark-up, price, and branding settings. For best results, use the overview and screenshot prompts in every section for clear guidance step-by-step.