**Customer Actions in moonstride**

*Manage, update, communicate with, and organise every customer in your CRM—all with a full suite of actions at your fingertips.*

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**1. Customer Actions Overview**

From the **Customer List** screen, you can take any relevant action for each customer using the gear icon in the Actions column. These actions help keep all customer records, communications, bookings, and interactions up to date and well organised.

**Navigation**: CRM > Customer > Customer List

[Insert screenshot here: Customer List with Actions gear icon shown]

**2. Edit Customer**

* Edit any customer’s details by selecting **Edit** from the Actions menu.
* Make changes as needed to profile information, contact info, addresses, or linked passengers.

[Insert screenshot here: Edit Customer screen]

**3. Update Details in Quotation/Booking**

* If a customer’s information changes and they're linked to existing quotations or bookings, use **Update Details in Quotation/Booking** from the Actions menu.
* A pop-up will list all entries linked to that customer (quotations/bookings); tick which ones to update and click **Save**. All records are synchronised for accuracy.

[Insert screenshot here: Update Details pop-up with linked records shown]

**4. Add Enquiry**

* Start a new sales journey for an existing customer by clicking **Add Enquiry**. The new enquiry form pre-populates with the customer's info.

[Insert screenshot here: Add Enquiry screen with auto-filled customer information]

**5. Create New Quote**

* Generate a new quotation for a customer by clicking **Create New Quote** from the Actions menu.
* The form will automatically include the customer’s details.

[Insert screenshot here: Create New Quote screen]

**6. Email Communication**

* With the Email Centralization add-on, open **Email Communication** to send emails to the customer or see a trail of all previous email history.

[Insert screenshot here: Email Communication view showing email list and compose window]

**7. Notification History**

* View all notifications sent to the customer from the **Notification History** action.
* This displays messages and status updates sent from automated or manual workflows.

[Insert screenshot here: Notification History screen with message log]

**8. Manage Tags**

* Click **Manage Tags** to add, remove, or update tags associated with a customer for easier searching, segmentation, and reporting.

[Insert screenshot here: Manage Tags window—showing tag selection and assignment]

**9. Send Portal Invitation**

* To grant portal access, select **Send Portal Invitation**.
* An email is sent to the customer with a customisable link to set their password and access the Customer Portal, where they can see, update, or manage quotes and bookings.

[Insert screenshot here: Portal Invitation configuration screen]

* Once registered, customers can view all trip information and make self-service updates.

**10. Manage Tasks**

* Click **Task** in the Actions menu to review, add, or edit tasks related to a customer (e.g. calls, meetings, to-dos, emails).

[Insert screenshot here: Tasks panel for customer including add, edit, and delete options]

* In the **Schedule Task** screen, fill out:
  + Type of Task
  + Task Name
  + Start & End Date and Time
  + Priority (High, Medium, Low)
  + Status (Open, Closed, On Hold)
  + Assigned By, Assigned To
  + Linked To (customer reference)
  + Description

[Insert screenshot here: Schedule Task form]

* Alternatively, manage all tasks from **CRM → Task Management → Task List**.

**11. Delete Customer**

* Delete a customer by clicking **Delete** in the Actions menu.
* An alert appears for confirmation. Only customers not already linked to any enquiry, quotation, or booking can be deleted.

[Insert screenshot here: Delete Customer confirmation pop-up]

**12. See Also**

* [Creating a New Customer / Passenger](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)
* [Customer Portal and Self-Service](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)
* [Customer Communication and History](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)
* [Task and Tag Management](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)

**Summary**

moonstride's customer action menu makes it easy to maintain accurate, up-to-date customer records; initiate or update enquiries and quotations; send invitations and notifications; manage emails, tags, and tasks; and keep your CRM fully synchronised and compliant.