**Customer FAQs**

**How can I map the passengers of a specific booking with the customer linked to that booking?** When creating or updating a booking, simply tick the box labelled ‘Create new passenger with same customer details’ to map the passenger profile with the selected customer’s information.

**What is the difference between a Customer and a Passenger?** A *customer* is the point of contact—making the enquiry, requesting a quote, or booking services. All administrative communication and documentation is managed with the customer. A *passenger* is an individual actually travelling and using the services. One customer can be a passenger, but they may also manage bookings for others.

**Is it possible to mark the customer as Lead Passenger?** Yes, when adding a new customer, tick the "mark as Lead Passenger" box. This will save the customer’s info as the lead passenger’s details. In the passenger list, lead passengers are flagged with an ‘L’.

**How can I add a new customer?** You can add a customer in two ways:

* While creating a new enquiry, quotation, or booking (add the customer inline).
* Or directly from CRM → Customer → Add New Customer.

**How can I see what deposits are due for customers and suppliers?** View due deposits using the **Customer Payment Due** and **Supplier Payment Due** widgets on your dashboard. You can also set up notifications for timely alerts.

**What are the different payment methods a customer can use?** Customers can pay by Cash, Card, Cheque, Bank Transfer, or UPI. For card payments, you’ll need to integrate your payment gateway with moonstride.

**Is there a way to send payment reminders to customers?** Yes. Generate automated payment reminders by navigating to Widgets → Email and Notifications → Automated Notification.

**Can I set my business email address for all customer notifications?** Yes, set up your business email in moonstride. All system notifications sent to customers and suppliers will then use this address as the sender.

**Where can I find vouchers and invoices created for a customer?** Go to the Documentation section in the booking module. All vouchers and invoices generated for a customer are stored there.

**How do I blacklist a customer?** Navigate to CRM > Customer > Customer List. Click the Actions gear for your chosen customer and choose **Edit**. In the Customer Details > Other Details section, set ‘Blacklist’ to Yes.

**How can I view all enquiries, quotations, and bookings for a customer?** Go to CRM > Customer > Customer List. You’ll see columns for Total Enquiry, Total Quotation, and Total Booking. Click the numbers in these columns to view the complete list of each.

**How can I add more customer sources?** Go to CRM > Customer > Source of Customer, then click Add. Enter the new source and set status to Active.

**Is there credit note functionality for customers?** Yes. If a booking is cancelled or postponed, raise a credit note for the amount (refundable or adjustable). Refundable notes can be settled against payment; adjustable notes may be used on future bookings. Issue these from CRM > Bookings > Credit Note.

**Can tax configuration be set up for individual customers?** Yes. Go to CRM > Customer List > [Customer] > Manage Account and Tax to set tax rules for each customer.

**Is there a way to mask a customer’s data?** Yes. Use the GDPR configuration to enable data masking for any customer.

**Can I set up multiple email addresses for a single customer?** No. Each customer must have a unique email address in moonstride; only one email address is supported per customer for communication and login.

**How do customers log into the customer portal? Is this an add-on?** Yes—this is an add-on feature. Customers use a portal invitation link sent from the booking or quotation. They set a password, optionally go through two-factor authentication, and then can review bookings, make payments, add/edit passengers, and send messages to staff or other passengers.

**Can customers update passenger details in a booking via the portal?** Yes, customers can edit passenger info by logging into their portal, selecting a booking, and editing the passenger details via the Passengers tab.

**How does the Customer–Passenger relationship work if a customer is created via the Enquiry API?** moonstride will automatically create a matching passenger profile for any customer generated through API integration.

**Will editing a passenger's details update the customer profile?** Yes, any changes made to a passenger’s profile will also update the linked customer’s details.

**Can customers make changes to bookings or quotes via the portal?** No. However, they can use the “Recent Messages” section to send requests to staff. Staff users can then review and make necessary changes.

**If I update customer details, will this affect their quotations and bookings?** Yes—when you edit a customer, moonstride will prompt you to update all linked quotations and bookings. Confirm to update everywhere.

**How can I create a passenger?** You can add a passenger either from CRM > Passenger List > Add or from CRM > Booking > Add Passenger.

**Is there a way for passengers to add their details themselves?** Yes, send a registration link from the Passengers tab in the booking or quotation. Passengers can fill out their details and submit the form, which updates in moonstride.

**If a passenger already exists, can they update their info via registration link?** Yes—use the “Request Passenger Details” feature to send a link where passengers can review, update, and save their details.

**Can a passenger have two email addresses?** No. Each passenger can only have one email address, as this field is used as a unique identifier in moonstride.

**How can I see total bookings or quotes for a passenger?** Go to CRM > Passenger List to view all quotations and bookings linked to a passenger.

**How can I send an itinerary displaying only allocated services to passengers?** From the Passengers tab in the booking, click the Actions gear for a passenger and use “Share Itinerary Link.” This sends the passenger an itinerary displaying their allocated services only.

**Can we make passenger details such as passport info non-mandatory on forms/portals?** Yes—go to Administration > Settings > B2B/B2C Portal settings and configure which fields should be mandatory or optional.

**Can a passenger be marked as Lead passenger?** Yes. In the Passengers tab, click the Actions gear for a passenger and choose “Mark as Lead.”

**How do I quickly add many passengers without manual entry?** Use the Import/Export functionality in the Passengers tab: export the template, fill in bulk details, then import the file back into the booking.