**Enquiry Calendar View in moonstride**

*Efficiently track all lead activity and follow-up schedules in one visual calendar. The Enquiry Calendar View gives you a complete picture of workload, follow-up dates, and current statuses—making it easy to see what’s happening day-by-day, week-by-week, and month-by-month.*

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**1. Enquiry Calendar View Overview**

The Enquiry Calendar View visually displays all activities and follow-ups related to enquiries, helping agents manage their pipeline across different timeframes. You can instantly spot which leads are scheduled for a particular day, week, or month, and drill down into each activity as needed.

**2. Accessing Enquiry Calendar View**

**Navigation:** From the main menu, go to **CRM → Enquiry → Calendar View**.

*Insert screenshot here of the navigation path and the main calendar view screen.*

In Calendar View, each entry shows the current stage of every customer’s lead and provides insight into agent workload by date.

**3. Search and Filter Options**

To quickly find the enquiries or follow-ups you need:

* Click the **Filter** icon at the top right of the Calendar View screen.
  + *Insert screenshot here showing the Filter icon on the Calendar View.*

**Search bar fields include:**

* **Created By:** Filter by the user who created the enquiry.
* **Assign To:** View enquiries assigned to a particular agent.
* **Source Of Enquiry:** Narrow down by enquiry origin (e.g., web, walk-in, referral).
* **Pipeline Stage:** Focus on leads at a specific workflow stage.
* **Follow up Status:** Filter by the status of each scheduled follow-up.
* **Month/Year:** Jump to a particular calendar period.
* **Event:** Search for specific follow-up types or events.

Once the required fields are set, click **Search** to display only relevant calendar entries.

*Insert screenshot here of the search/filter bar and filtered calendar results.*

**Example:** Select *Month: April*, *Year: 2023*, click **Search**—the calendar will show only relevant enquiry and follow-up activity for that period.

**4. Calendar Navigation and Display Modes**

The calendar offers flexible viewing:

* **Month, Week, Day, or List views:** Choose the mode that works best for your planning needs.
  + *Insert screenshot here showing toggles for Month/Week/Day/List view.*
* Use the **"<"** and **">"** navigation controls to move between previous/next month, week, or day.
* View leads and follow-ups for the current day, week, or month with a single click.

*Insert screenshot here with navigation arrows and different calendar view modes.*

**5. Viewing Enquiry and Follow-Up Details**

* Click on any enquiry or follow-up in the calendar to see more details about that task or activity.
  + *Insert screenshot here showing the details pop-up for a specific calendar entry.*
* The detail window gives you quick access to status, agent, customer details, and any special notes.
* Other scheduled to-dos (meetings, calls, emails, etc.) also appear in the calendar alongside standard follow-ups.

You can use these features to get a comprehensive view of all your sales activities in one place.

**6. See Also**

* [Managing Enquiry](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)
* [Set Up Enquiry Follow Up](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)
* [Task Scheduling and Management](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)
* [Pipeline View for Enquiries](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)

**Summary**

The Enquiry Calendar View in moonstride is your at-a-glance workspace for understanding day-to-day and future CRM workloads, scheduled follow-ups, and pipeline status. Apply search filters, toggle your preferred time display, and click into activities for detail—so every enquiry is managed on time and nothing falls through the cracks.