**Enquiry FAQs**

**Can we see the history of each enquiry, quotation, and booking?** You can view the list of all enquiries, quotations, and bookings on their respective screens. However, at present, there is no feature to view the full modification history (audit log) for individual records on the platform.

**If an enquiry is captured from the website via API, does it automatically change the currency type when it enters the system?** If the enquiry submitted through your website specifies a currency, the system will lock and use that currency. If no currency is specified, moonstride will use the platform’s default currency for the enquiry.

**Can we associate an enquiry with an existing customer?** Yes, you can assign an enquiry to an existing customer by selecting the customer from the customer reference section while creating the enquiry.

**Can enquiries be captured automatically from the website?** Yes, once your website is integrated with moonstride using the Enquiry API, all online enquiries will be automatically created in the moonstride platform as soon as a customer submits an enquiry form on your site.

**Is it mandatory to add all passenger details into the enquiry at the time of creation?** No, you can create an enquiry without all passenger details. However, to generate and send a quotation, you must enter the lead passenger’s details to be able to email the quote and related documents.

**Can I export enquiry data to an external file?** Yes, you can download enquiry information as an Excel file from the enquiry list screen. The Excel export can be used for marketing, sales, reporting, and data analysis.

**Is it possible to customise the enquiry title to suit our business needs?** Absolutely. moonstride allows you to configure the rules for enquiry title generation, so the system will automatically create titles based on your preferences, or you can manually enter them as needed.

**What are the benefits of the pipeline view, and how is it different from other systems like Pipedrive?** Pipeline view in moonstride lets you see the exact stage of every lead, from enquiry and quotation through to booking. It gives an easy visual overview of progress and task status. You can fully manage and customise pipeline stages to fit your business process.

**Is it possible to input personalised tags?** Yes, you can set up custom tags for enquiries, quotations, bookings, suppliers, and more. Head to **CRM > Tags > Tag List** to create tag categories, select which widgets or record types they apply to, and add values for each category. These tags can then be assigned to the appropriate records throughout the system.

**Is it possible to remove age for adults, or require child age only? Can we set the age input to ‘none’ by default?** Yes, the system allows you to configure age settings for passengers. By default, this can be set to 'none', so you'll only be prompted for the ages of children and infants.

**With new tag category options (such as type of booking, location, etc.), can I create new tags without going via the administrator? Is it possible to add tags dynamically, like a search term?** Currently, tag categories and tag values must be set up in advance from the Tag List screen. They need to be pre-configured and cannot be created on-the-fly at the point of use.