**Manage Documentation – Quotation in moonstride**

*Easily upload, store, track, download, and share all documents associated with any quotation or booking. Stay organised, maintain compliance, and streamline communications from one central repository.*

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**1. Manage Documentation Overview**

moonstride lets you manage every document (internal or external) related to a quotation or booking within the system. Access documentation by clicking the **Documentation** tab in the "Add Quotation" or "View Primary Details" screen, or through **CRM → Quotation → Quotation List → Actions → Manage Documentation**.

*Insert screenshot here displaying the Documentation tab and how to access it from the Actions menu.*

You can upload, view, download, share, and maintain a complete document history for every quote.

**2. Documentation Repository**

**Add Documents**

* Click **Add** in the Documentation Repository tab to upload a new file.
* **Name & Description**: Enter required name and short description for reference, if required.
* Fill in required details:
  + **Upload Document:** Select the document to be stored.
  + **Internal Document (checkbox):** Tick this box to mark the document as for internal staff only—internal documents will not be shared externally.

*Insert screenshot here of the Add Document form, highlighting the internal/external option.*

* Once saved, documents will appear in the list for quick view and action. You can add multiple documents as needed.
* You can see the name, description, type (internal/external), shared with, action by, uploaded date time information of each document.

**Email Documents**

* Use the **Email Documents** button to send one or more documents to a customer, internal user, or external party.
  + Choose the predefined email template.
  + Fill in sender, recipient, subject, and any editable content as required.
  + Attach the selected documents to the message.

*Insert screenshot here of the Email Documents interface, showing template selection and address fields.*

**Edit or Delete Documents**

* Documents in the repository can be:
  + **Viewed:** Open/download the original file.
  + **Edited:** Update file name or internal/external status.
  + **Deleted:** Remove documents as needed.

*Insert screenshot here showing document list actions (edit, delete, download).*

**3. Documentation History**

* Every document sent by email (via the Email Documents feature) is recorded in the **Documentation History** tab.
* This provides a clear audit trail—showing file name, date sent, recipient, sender, email subject, and document status.

*Insert screenshot here showing the Documentation History list view with all columns.*

You can review full communication history for compliance, follow-up, or reference needs.

**4. See Also**

* [Manage Documentation – Booking](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)
* [Quotation & Booking Notes](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)
* [Email Communication & Templates](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)
* [Compliance & GDPR Settings](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)

**Summary**

Manage Documentation in moonstride brings all your quotation-related files and communication records into one secure, accessible location. Upload, track versions, email, and audit every attachment—streamlining the entire documentation workflow and improving customer and supplier relations.