**Manage Notes in moonstride (Quotations)**

*Attach, manage, and share detailed notes for every quotation—ensuring nothing is missed at any stage of the quoting process. All note actions are just a click away for every user involved.*

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**1. Manage Notes Overview**

All notes related to a specific quotation can be found and managed via the **Manage Notes** option in the Actions menu for each quote.

**Navigation:** CRM → Quotation List → Actions → Manage Notes

*Insert screenshot here showing the Actions menu for a quotation and "Manage Notes" highlighted.*

On the Manage Notes screen, you can add, review, update, or remove notes related to the quotation. Each entry is listed with its type, title, description, and any linked documents.

**2. Add Note**

To add a new note for a quotation:

* Click the **Add** button within the Manage Notes screen.
  + *Insert screenshot here showing the Add button and the blank note input form.*

Fill out the following fields:

* **Note Type:** Select from the dropdown (e.g., Guide Specific, Internal, Special Request, etc. — these are predefined within the system).
  + *Insert screenshot here displaying available Note Type options.*
* **Title:** Enter a short descriptive title for the note.
* **Description:** Add supporting information or context.
* **Shown On:** Indicate where this note should display (Invoice, Booking Voucher, Supplier Notification, etc.).

Once a note is saved, it can be updated or deleted at any time.

*Insert screenshot here of a completed note entry.*

**3. Search Notes**

Filter and search among all notes attached to the quotation:

* Click the **Filter** button to open the search bar.
* Search by note type, title, description, shown on document, or any other available parameter.
  + *Insert screenshot here of the search/filter panel above the notes list.*

This makes it simple to find notes related to specific tasks, instructions, or process steps.

**4. Export To Excel**

Create a backup or analyse notes externally:

* Use the **Export To Excel** option at the top right to download the full list of notes as an Excel file.
  + *Insert screenshot here showing the Export To Excel button and a sample of the resulting spreadsheet.*

**5. Notes Actions**

Once created, notes can be easily managed:

* **Edit:** Click the edit button/icon next to a note to modify its details or update its display options.
* **Delete:** Remove a note that is no longer required.
  + *Insert screenshot here of the Edit and Delete icons beside each note entry.*

**6. See Also**

* [Manage Notes for Enquiries](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)
* [Manage Notes for Bookings](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)
* [Attach Notes to Passengers or Services](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)
* [Quotation Lifecycle and Documentation](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)

**Summary**

Managing Notes in moonstride allows you to keep a detailed audit and communication trail for every quotation. Attach key information at each stage, ensure compliance, and easily review all activity for accuracy and follow-up.