**Manage Passengers in moonstride**

*Easily add, organise, and manage passenger data for each quotation. moonstride allows you to import, edit, and share passenger information, allocate services, and handle payments and communications—all in one place.*

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**1. Manage Passengers Overview**

To access passenger management for a quotation, click the **Passengers** tab in either the “Add Quotation” screen or “View Primary Details” of an existing quotation. This opens the full passenger details and management interface.

*Insert screenshot here of the Passengers tab within a quotation.*

**2. Adding, Importing, and Selecting Passengers**

moonstride offers several ways to quickly add passenger data:

* **Import:** Click the **Import** button to upload passenger data for multiple travellers at once.
  + Download the sample file provided, prepare your data in the specified format, choose your file, and click **Import Data**.
  + *Insert screenshot here of the Import pop-up and sample file instructions.*
* **Select Passenger:** Choose an existing passenger in the system by clicking **Select Passenger**, searching, and selecting from matched results.
  + *Insert screenshot here of the select existing passenger screen.*
* **Add Passenger:** For totally new travellers, click **Add Passenger** to enter new data. Complete personal, passport, frequent flyer, TSA PreCheck, travel preferences, and emergency contact details as needed.
  + *Insert screenshot here of the Add Passenger form.*
* **Delete Passenger:** Delete one or multiple passengers using the checkboxes beside their names. System prevents deletion if the passenger is already allocated to a service.
  + *Insert screenshot here showing how to select and delete passengers.*

After adding or selecting passengers, each entry is shown in the "Passenger Details" tab with columns including name, type, DOB, age, contact, address, and the **Service Count** (number of services allocated per passenger).

* You can set and save the desired display or document order for passengers by updating the **Sort Order** column.
  + *Insert screenshot here of the full passenger list with sort order.*

**Bulk Add Passenger**

Increase passenger count in the booking by auto-creating dummy records for large groups. For example, use **Bulk Add** to quickly create placeholders for all group members before full details are available.

*Insert screenshot here of the Bulk Add Passenger interface.*

**3. Service Allocation**

Allocate or review specific services for each passenger:

* Click **Service Allocation** button for a passenger to open a detailed screen showing all assigned services.
* View, edit, and reassign services; export allocation tables for external use.
  + *Insert screenshot here of the Service Allocation window.*

**4. Export**

* Click the **Export** button to download all passenger details for the current booking or quotation as an Excel file.
  + This includes names, contact, requests, medical/dietary needs, notes, and allocation—ideal for external reference or reporting.
  + *Insert screenshot here showing the Export button and resulting Excel format.*

**5. Share Registration Link**

Simplify data capture by letting passengers enter their own details directly:

* Click **Share Registration Link**, open the configurable email template, and generate a link/URL for passengers to complete their information securely online.
  + *Insert screenshot here of the Share Registration Link settings and email form.*

**6. Configure Deposit/Payment Plan**

Define custom deposit or payment plans for each passenger:

* Click **Deposit/Payment Plan** to set terms such as payment deadlines, instalment stages, and amount criteria.
  + *Insert screenshot here of the Deposit/Payment Plan setup screen.*

**7. Passenger Actions**

For every passenger entry in the list, several actions are available via the Actions menu or direct links:

* **Edit Passenger Detail:** Open the edit screen to view and change details, then save.
  + *Insert screenshot here of Edit Passenger Detail form.*
* **Share Payment Link:** If a payment plan is active, send a payment URL directly to a passenger.
* **Add Note:** Attach a specific note for a passenger, selecting from existing note types and controlling the display (e.g. on documents).
  + *Insert screenshot here showing Add Note pop-up for a passenger.*
* **View Note:** Review past notes for clarity and auditing.
* **Mark as Lead:** Assign the lead passenger role for clear documentation and communication.
* **Send Portal Invitation:** Send login instructions so that the passenger can access their portal to enter/update their own data (limited rights).
  + *Insert screenshot here for the Portal Invitation email/template set up.*
* **View Itinerary:** Open the passenger’s itinerary in a new browser tab, formatted per system template and assigned services.
* **Share Itinerary Link:** Send a customisable email to the passenger with a direct online link to their itinerary, controlling which sections are visible.
  + *Insert screenshot here showing the share itinerary email form.*
* **Request Passenger Details:** Trigger an email with a secure form link for the passenger to self-update every required field, such as personal, passport, preferences, and emergency contacts.
  + Specific form fields can be made mandatory, and form/link usage can be set to expire after a defined time.
  + Some fields become locked after addition or after service is confirmed to ensure pricing and data integrity.
  + *Insert screenshot here showing the Request Passenger Details email template/form.*
* **Delete:** Remove the passenger as long as no services are allocated. If allocated, passengers cannot be deleted directly; changes must be coordinated to avoid affecting service prices and allocations.

**8. See Also**

* [Dynamic Package Search & Quote](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)
* [Passenger Communication & Notes](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)
* [Manage Tags for Bookings & Passengers](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)
* [Group Booking Features](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)

**Summary**

With moonstride’s Manage Passengers tools, you can flexibly add, import, and allocate passengers; delegate data entry with secure links; configure payment and registration; and control every communication and document—ensuring seamless, accurate, and customer-friendly travel management.