**Manage Tags in moonstride (Quotations)**

*Effortlessly organise, categorise, and track your quotations using tags. Tags enable flexible filtering, targeted searches, reporting, and automated workflows to streamline your sales pipeline and empower your team with actionable insights.*

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**1. Manage Tags Overview**

**Tags** in moonstride are flexible, customisable labels that you (and your team) can attach to quotations, bookings, enquiries, suppliers, and more. A tag might represent attributes such as booking type (e.g. group, corporate, honeymoon), destination, enquiry source, urgency (e.g. VIP, high priority), marketing campaign, seasonality, or any other useful business concept.

**Usability in moonstride:**

* **Quick search & filtering:** Tags make it easy to rapidly locate and segment quotations on any screen, using filters or search.
* **Organisation:** Easily group records by tag—for example, all “Wedding”, “Black Friday Sale”, or “Repeat Customer” quotations.
* **Analytics & reporting:** Run reports or analyse data for specific tags to find trends or successes.
* **Automation:** Trigger follow-ups, communications, or next steps based on applied tags.
* **Collaboration:** Use tags to communicate sales status, customer types, or workflow milestones across teams.

*Insert screenshot here showing a quotation’s Actions menu with the "Manage Tags" option prominently visible.*

**2. Adding and Managing Tags**

* To add or manage tags on a quotation, select **Manage Tags** from the quotation’s Actions menu.
  + *Insert screenshot here of the Manage Tags interface with tag categories and tag value selectors.*
* Select existing tags from predefined categories.
* Multiple tags can be attached as needed; click the relevant tag value for each category as appropriate for the quotation.
* To remove a tag, click the remove or delete icon next to the tag.

Tags you apply make it easier to segment quotations for searching, workflow management, and business analysis—directly from the Quotation List or in reports.

**3. Tag Inheritance**

* **From Enquiry:** Quotation tags are automatically inherited if the quotation was created from an enquiry, provided those tag categories exist at the quotation level. These tags are further retained into bookings, maintaining continuity throughout the sales process.
* **From Agent:** Tags attached to the quotation’s agent are pulled into the new quote (as long as those tags aren’t already present). If a different agent is selected, the agent’s tags will update accordingly in the quotation.

*Insert screenshot here showing inherited tags from an enquiry or agent in a new quotation’s tag list.*

**4. See Also**

* [Set Up Tag Categories](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)
* [Manage Tags for Enquiries and Bookings](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)
* [Reporting & Workflow Automation Using Tags](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)

**Summary**

Tags in moonstride are a powerful tool for keeping your quotations highly organised, easy to find, and strategically segmented for marketing, analytics, and workflow. Attach, remove, and inherit tags as your quoting process flows—ensuring your business is always one step ahead in its sales pipeline and reporting.