**Manage Tasks in moonstride (Quotations)**

*Keep every task—calls, meetings, follow-ups—organised and trackable for each quotation. moonstride’s task management ensures your team never misses a deadline and every sales activity is fully coordinated.*

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**1. Manage Tasks Overview**

All actions related to follow-ups or activities on a quotation are managed via the **Manage Tasks** option in the Actions menu.

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

*Insert screenshot here showing the Quotation List Actions menu with Manage Task highlighted.*

The Manage Tasks screen displays all scheduled activities related to the selected quotation—such as to-dos, calls, meetings, and emails. Tasks can be viewed, added, edited, deleted, or tagged from this screen.

**2. Add Task**

To schedule a new task for a quotation:

* Click the **Add** button within the Manage Tasks screen.
  + *Insert screenshot here of the Add button and blank task entry form.*
* You’ll be prompted to fill in:
  + **Type of Task:** Select Call, Meeting, To Do, or Email.
  + **Task Name:** Write a clear, descriptive name (e.g., "Chase Deposit Payment").
  + **Start & End Date and Time:** Schedule when the task should take place.
  + **Priority:** Assign High, Medium, or Low priority.
  + **Status:** Open, Closed, or On Hold.
  + **Assigned By/Assigned To:** Choose who is creating and who is responsible for this task.
  + **Linked To:** Displays the related customer for the quotation.
  + **Description:** Provide additional details or action steps.
* Click **Save** to add the task to the ongoing list.

*Insert screenshot here showing a completed Add Task form.*

**3. Search Task**

Quickly locate any created task by clicking the **Filter** button in the task management screen.

* Search by parameters such as task type, priority, assigned user, status, or date range.
  + *Insert screenshot here showing filter/search panel for tasks.*

This enables fast retrieval and tracking of specific tasks.

**4. Export To Excel**

Export the data for all or selected tasks to Excel:

* Use the **Export To Excel** option (top right) to download the full list of tasks as an Excel file for external analysis, reporting, or sharing with other teams.
  + *Insert screenshot here illustrating the Export To Excel button and exported file format.*

**5. Task Actions**

Each task on the list can be:

* **Edited:** Update any task details by clicking on the edit icon.
* **Deleted:** Remove a task if it's completed or not needed anymore.
  + *Insert screenshot here of Edit and Delete options for tasks.*

**Manage Tags:**

* Attach one or more tags to any task for easier categorisation and filtering (e.g., "Urgent", "Follow-Up", "Callbacks").
  + *Insert screenshot here with the tag categories dropdown visible on a task.*

Tags make it easier to group, report, or follow up on similar types of tasks across all quotations.

**6. See Also**

* [Manage Tasks for Enquiries](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)
* [Quotation Notes and Communications](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)
* [Lead to Booking Workflow](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)
* [Setting Up User Task Notifications](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)

**Summary**

Task management for quotations in moonstride helps sales and operations teams stay organised, accountable, and on top of all necessary actions. Capture, edit, and follow up every task, and don’t forget to use tags and export features for full visibility and tracking.