**Managing Enquiry in moonstride**

*Capture, track, and convert every sales opportunity from the first contact to a qualified lead. moonstride’s comprehensive Enquiry Management module ensures all details are organised, followed up, and ready to transform into bookings.*

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**1. Enquiry Management Overview**

Enquiries are the starting point of the sales journey—gathering information from individuals or organisations via your website, advertising, referrals, and more. moonstride provides a single, centralised platform to manage, follow-up, and nurture enquiries until they are ready to be converted into bookings.

**2. Enquiry List**

**Navigation:** CRM → Enquiry → Enquiry List

View all manually added or captured (e.g., website API) enquiries in a single list with creation date, enquiry ID, quote reference, customer name, source, follow-up date, and more. Actions (edit, follow-up, quote, etc.) are accessible directly from this list.

*Insert screenshot here of the Enquiry List screen.*

All users must have an account to add or create enquiries.

**3. Add New Enquiry**

**Manually**

* Click **Add** in the enquiry list (CRM → Enquiry → Enquiry List → Add), *or*
* Go directly to **CRM → Enquiry → Add New Enquiry**

This opens a blank form to input all essential enquiry details.

**Details you can add:**

* **Primary Details:** Enquiry Title (or auto-generated), Pipeline Stage, Language, Preferred Currency, Source of Enquiry, Description, Sell Channel, Travel Date, Number of Nights, Number of Travellers (adults, children, infants), and Traveller’s Age/DOB Preference.
  + The system automatically populates end dates and service durations based on these inputs.

*Insert screenshot here of the Add New Enquiry or enquiry entry form.*

* **Visibility Details:**
  + Assign To (user/staff member)
  + Visibility (Public = all users; Shared = select users only)
* **Agent Details:** Select or add an agent or agent user, and edit their details.
* **Customer Information:** Search existing or add a new customer, select customer type (individual/corporate), mark as Lead Passenger, contact and address details (optional).
* **Service Details:** Optionally, add requested services (package, flight, hotel, transfer, etc.).
* **Notes:** Add notes by note type, title, description, and select where they’re displayed (Invoice, Voucher, Supplier Notification, etc.).

Click **Save** after entering all required details. Use the **Add Quotation** button to instantly start a new quote using this enquiry, or the **Dynamic Package Search & Quote** button for service-based search and quote creation.

**4. Enquiry Actions**

Once enquiries are created, all related actions are available from the Enquiry List screen via the **Actions** gear icon.

**Edit Enquiry**

* Click **Edit** to amend any detail of the enquiry. If quotations are already created from this enquiry, these will be linked and accessible from this screen.

*Insert screenshot here showing the Edit Enquiry screen and a linked quotations list.*

**Follow-up**

* Schedule a follow-up date and time with notes or requests for each enquiry stage—whether new, in-process, confirmed, or cancelled.

*Insert screenshot here of the follow-up date/time entry field.*

**Create New Quote**

* Use **Create New Quote** to convert the enquiry directly into one or more quotations. *For more, see the “Creating a New Quotation” article.*

**Dynamic Package Search & Quote**

* Click to open a live service search and quotation builder, letting you find relevant services to package into a new quote. *See “Dynamic Package Search & Quote” for full guidance.*

**Email Communication**

* Manage all related email interactions with the customer via a dedicated module—compose, send, search, and view all email history centralised for each enquiry.
* Use predefined email templates for thank yous, follow-ups, and more.

*This feature can be enabled as an Addon. Screenshot here for the Email Communication screen.*

**Notes**

* Add new notes (choose note type, title, description, visibility).
* View or edit previously added notes as needed.

**Manage Tags**

* Add tags to categorise and filter enquiries for easy searching. Attach multiple tags one at a time from available categories.

Tags apply to related quotations and bookings as well, maintaining consistent tracking throughout the customer’s journey.

*Insert screenshot here of tag management with categories.*

**Task**

* Manage enquiry-related to-dos, calls, meetings, and emails.
* See all scheduled tasks for the selected customer and edit or delete as required.

Clicking **Schedule Task** allows specification of: - Task type (Call, Meeting, To Do, Email) - Task name, start/end date and time - Priority (High, Medium, Low) - Status (Open, Closed, On Hold) - Assigned by/to - Linked customer details, and a task description

*Insert screenshot here of the Task scheduling screen.*

**Delete Enquiry**

* Click **Delete** in Actions to permanently remove the enquiry and all associated activities.
* Confirm deletion in the warning prompt that appears.

**5. Search/Filter Enquiry**

Use the **Filter** option at the top right of the enquiry list to search and filter by:

* Enquiry Date (from/to)
* Created By
* Status
* Assign To
* Source of Enquiry
* Tags
* Pipeline Stage
* Agent/Agent Users
* Sell Channel
* Shared With

Click **Search** to list enquiries matching criteria.

Filter by status from the top left of the list for instant sorting (e.g., only new, in process, confirmed, or cancelled).

*Insert screenshot here of the filter/search bar and result list.*

**6. Calendar View**

Switch to **Calendar View** to visually browse enquiries by follow-up date, month, week, day, or list.

**Navigation:** CRM → Enquiry → Calendar View

* Click the calendar icon, select the desired time frame, and use **Search**. All due follow-ups and related tasks for that time period display in calendar format.

*Insert screenshot here showing Calendar View with specified filters.*

**7. Pipeline View**

Filter and review enquiries by sales pipeline stage using **Pipeline View**.

* Click the pipeline icon, enter a date range, fill additional filters as needed, and click **Search** to see which stage all enquiries are at during the selected period.

*Insert screenshot here showing Pipeline View, with enquiry stages represented visually.*

**8. Export to Excel**

Export the full list of enquiries—including all input details, tags, and activity history—by clicking the **Export to Excel** button at the top right of the Enquiry List. Use this file for backup, offline analysis, or external processing.

*Insert screenshot here of the Export to Excel button.*

**Summary**

Managing Enquiry in moonstride provides a complete toolkit to capture, update, track, and convert every sales opportunity. From initial entry to follow-up, tagging, quoting, tasking, and reporting, every stage is structured for ease, automation, and results. Insert platform screenshots wherever directed for user clarity.