**Managing Quotation in moonstride**

*Transform leads into bookings with ease. The Quotation Management module in moonstride gives you full control over creating, tracking, personalising, and converting quotations for each customer enquiry.*

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**1. Quotation Management Overview**

A quotation in moonstride is a formal offer outlining prices and payment terms for travel products or services—sent directly to prospective customers. The quotation module handles details for any combination of products (flights, hotels, tours, transfers, etc.) and gives you the power to manage the entire process from creation to booking.

**2. Quotation List**

**Navigation:** CRM → Quotation → Quotation List

The Quotation List screen displays all quotations created in the system, with key information like date of creation, quotation number, sell channel, customer details, travel dates, and more.

*Insert screenshot here showing the Quotation List page.*

You can take further action on any quote using the **Actions** gear icon.

**3. Search with Status**

Use the status selector at the top right of the Quotation List to filter quotes by their status (e.g., Open, Incomplete, Expired, Converted, Cancelled, All).

*Insert screenshot here of the status selector/filter.*

**4. Import PNR**

Directly import PNRs (Passenger Name Records) for flight services:

* Click **Import PNR** to open the PNR import screen.
* Enter details like provider, currency, locator code, and select what to import.
* Click **Import** to add the flight to the quotation.

*Insert screenshot here of the Import PNR dialogue and result.*

Imported flight services will be marked "Not Confirmed" until further action is taken.

**5. Filter**

Search and filter the Quotation List with powerful options. Available search fields include:

* Reference No.
* Booking Date
* Created Date
* Travel Start/End Date
* Balance Due Date
* Sell Channel
* Tags
* Supplier Status
* Currency
* Customer (name/email)
* Supplier (multiple select)
* Supplier Status (multiple select)
* Category (Package, Flight, Hotel, etc.)
* Travel Agency Consortium
* Agents/Agent Users
* Status (Open, Incomplete, Expired, Converted, Cancelled)
* PNR No.
* Created By
* Assigned To
* Shared With
* Services
* Pipeline Stage
* Quotation Expiry Date
* Custom Search by selected fields (e.g., internal reference number)
* Show Enquiry Title
* Quote Type (FIT or Group Quotes)

*Insert screenshot here of the Filter/Search bar expanded with example fields filled.*

Click **Search** to display results that match all selected criteria.

**6. Creating a New Quotation (Add)**

**You can create a new quote in three main ways:**

**1. Convert an Enquiry to Quotation**

* From **CRM → Enquiry → Enquiry List**, select an enquiry and use the **Create New Quote** button in Actions.

**2. Dynamic Package Search & Quote**

* Use "Dynamic Package Search & Quote" to build a quotation with live service searches and package creation.

**3. Add New Quotation**

* Go to **CRM → Quotation → Add New Quotation** or use **Add** from Quotation List.
* Align your quote with an existing enquiry by adding the Enquiry Reference Number.
  + Start entering 3 letters; system autosuggests matches.
  + Select the relevant enquiry to auto-populate all available details in the new quote.
  + All information can be edited as needed.

**Enter and update for each section:**

* **Primary Details:** Fill in the core information for the quotation, including the quotation title, pipeline stage, sell channel, currency, source of enquiry, language, travel dates, number of nights, number of passengers, and any general description. These foundational fields ensure the quotation is correctly tracked and tailored to the customer's preferences from the outset.
* **Agent Details:** Select or add the relevant agent and agent user, edit details, and manage communication or pricing information specific to the agent.
* **Customer Details:** Add a new customer or select from the existing database, including contact and address info, then review related activity history. **Terms & Conditions:** Link relevant T&Cs to the quote. These can be modified for each quotation if needed.
* **Email Quote:**
  + Use the “Email Quote” action to open the email quote screen.
  + Options include:
    - **Quotation For:** Choose if the quote is for a customer or agent.
    - **Branding:** Select branding for the document (Client, Agent, or Sell Channel).
    - **Document Template:** Choose which template to use.
    - **Sort By:** Select whether to sort listed services by type or date.
    - **Pricing Structure:** Pick what level of pricing to show.
    - **Service Description:** Choose which service details to include.
    - **Show Passenger Details:** Toggle to show/hide passenger info.
    - **Edit Cover Letter:** Open a rich text box to edit the cover letter for quotations.
  + After completing, either send the quotation to the customer/agent or download as a PDF.

*Insert screenshot here of the Email Quote options, template, and PDF generation.*

**7. Manage Quotations**

Once a quotation is created, manage and update each element from the Quotation List’s **Actions** menu:

**Manage Passengers**

* Add or edit every passenger linked to the quote (personal and contact info, allocation, payment assignments).

**Manage Services**

* Add, modify, or remove services (flights, hotels, transfers, tours, etc.) for the quote.

**Manage Itinerary**

* Manage detailed itineraries (daily programme, sequence, integration with services) for each quote.

**Manage Documentation**

* Upload and manage all related documentation.

**Finance Summary**

* View, update, or adjust financial/budgeting details for a quotation and all services.

**Manage Communication**

* Use the “Manage Communication” feature for all supplier & customer related comms:
  + **Supplier Communication:** Send confirmation requests, follow up on quoted services, and review supplier responses.
  + **Customer Communication:** Send reminders, follow-up emails, and keep track of ongoing customer interactions for each quotation.

*Insert screenshot here for each key Manage action screen, especially Communication.*

**8. Quote Lifecycle Actions**

**Cancel Quote**

* Choose “Cancel Quote” to void a quotation. The system asks for confirmation before proceeding.

**Remove Quote**

* Use “Remove Quote” to permanently delete a quotation from your system. This cannot be undone.

**Edit Quote**

* Click on the Quotation Number from the listing or “View Primary Details” in Actions to edit or update any quotation information.

**Convert Quote to Booking**

* Convert any valid, finalised quotation directly into a booking using the “Convert Booking” action from the quote edit screen.

**9. See Also**

* [Dynamic Package Search & Quote](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)
* [Manage Passengers](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)
* [Manage Services](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)
* [Quotation Notes and Tasks](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)
* [Quotation to Booking Workflow](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)

**Summary**

Managing Quotations in moonstride gives you a robust set of tools for quote creation, tracking, personalisation, and conversion. Use flexible filters, import functions, and a complete suite of lifecycle actions to run a seamless, professional quoting process from enquiry to booking.