**Quotation Actions**

[**https://helpdesk.moonstride.com/support/solutions/articles/64000289702-quotation-actions**](https://helpdesk.moonstride.com/support/solutions/articles/64000289702-quotation-actions)

**Table of Contents**

1. Overview
2. Quotation Actions (Quick List)
3. Working with Quotations
   1. Viewing Primary Details
   2. Managing Agent Details and Agent Users
   3. Managing Customer Details
   4. Sending Portal Invites
   5. Terms & Conditions
   6. Summary and Key Dates
4. Passenger, Services, and Itinerary Management
   1. Manage Passengers
   2. Manage Services
   3. Manage Itinerary
5. Document & Reference Management
   1. Manage Documentation
   2. Supplier References
6. Finance and Exchange
   1. Finance Summary
   2. Update Exchange Rate
7. Other Operations
   1. Manage Tasks
   2. Manage Notes
   3. Manage Tags
8. Communicating, Copying, and Cancelling Quotes
   1. Email Quote
   2. Copy Quote
   3. Cancel Quote
   4. Remove Quote
9. Helpful Hints

**Overview**

Once you've created a quotation in moonstride, you'll see all your quotations on the **Quotation List** screen. Each quotation has a range of actions available via the gear icon in the “Actions” column.

*Insert screenshot here of the Quotation List with the Actions menu highlighted.*

**Quotation Actions (Quick List)**

You can perform the following actions on any specific quotation:

* View Primary Details
* Manage Passengers
* Manage Services
* Manage Itinerary
* Manage Documentation
* Supplier References
* Finance Summary
* Manage Tasks
* Manage Notes
* Manage Tags
* Email Quote
* Update Exchange Rate
* Copy Quote
* Cancel Quote
* Remove (Delete) Quote

*Insert screenshot here listing the dropdown or menu with these actions visible.*

**Working with Quotations**

**Viewing Primary Details**

To view the main information for a quotation:

1. Open **Quotation List**.
2. Click the gear icon in the Actions column.
3. Select **View Primary Details**.

*Insert screenshot showing the location of the View Primary Details option and the resulting summary screen.*

You’ll see a summary with customer, agent, services, and booking details. Most info can be modified by clicking the **Edit** option, though some vital system fields are non-editable.

**Managing Agent Details and Agent Users**

If the quote was requested by an agent:

* Click **Select Agent**, and a dialog will appear for searching or selecting your agent by code, company, agent name, email address, or agent user.
* Once an agent is selected, you may also choose a specific ‘Agent User’ within that agency who is linked to the request.
* If you need to add a new agent user, click the **Add New** button next to “Agent User”.

*Insert screenshot showing agent selection, agent user selection, and the search/filter dialog.*

If a new agent is chosen, the system may prompt you whether to recalculate agent markup and commission or only commission.

Should the agent have provided the customer details, fill them in under ‘Customer Details’. If not, tick ‘Customer Same As Agent’. This auto-creates a corporate customer (if not already present). If you’ve specified a particular agent user, a new contact user for the corporate customer is auto-populated in the ‘customer’ section.

All “Additional Info” held against the agent is pulled into view. If agent tags are set, they appear under quotation tags (see Tags section).

*Insert screenshot showing the ‘Customer Same As Agent’ and agent info display.*

**Managing Customer Details**

For a direct customer booking:

* **Select Customer** allows you to link an existing customer record.
* Or click **Add Customer** to make a new one.

*Insert screenshot of customer selection/add screen.*

* **Edit Customer** lets you tweak all customer info.
* The **Pen (Edit)** icon next to a field is for editing just that part (e.g., contact details).

You can **Add Notes** and see them all via **View Notes**.

**Read/Write Message** keeps a log of portal correspondence with the customer.

**Sending Portal Invites**

To invite the customer to edit their booking/quote details directly:

* Use **Send Portal Invitation** (visible via the “More” icon on the customer panel).

This opens a screen to compose an email containing a login URL for the customer.

*Insert screenshot showing the Send Portal Invitation option and email screen.*

**Terms & Conditions**

Link terms and conditions for each quote or booking:

* Use the **Terms & Conditions** option to select, edit, or remove conditions.

*Insert screenshot showing Terms & Conditions panel option.*

**Summary and Key Dates**

* See and, if needed, manually change the recommended or actual deposit, quotation end date, or balance due date on the summary panel.
* Click **Save** to apply changes.

*Insert screenshot showing this section (recommended/actual deposit, end date, and save button).*

**Passenger, Services, and Itinerary Management**

**Manage Passengers**

Easily add, update, or remove passenger details:

* Go to Actions → **Manage Passengers**.

*Insert screenshot showing Manage Passengers screen/list.*

**Manage Services**

Add or revise services (flights, accommodation, transfers, etc.) in the quotation:

* Actions → **Manage Services**

*Insert screenshot showing Manage Services panel or form.*

**Manage Itinerary**

Customise the trip itinerary for your quotation:

* Actions → **Manage Itinerary**

*Insert screenshot of Manage Itinerary screen.*

**Document & Reference Management**

**Manage Documentation**

* Attach important documents relevant to the quotation.
* Access via Actions → **Manage Documentation**

*Insert screenshot showing documents section.*

**Supplier References**

* Record or upload supplier-related info for the quotation.
* Actions → **Supplier References**

*Insert screenshot of Supplier References screen.*

**Finance and Exchange**

**Finance Summary**

* Review and edit overall pricing for the quote and its services.
* Actions → **Finance Summary**

*Insert screenshot of finance summary/pricing dashboard.*

**Update Exchange Rate**

* If exchange rates change after your quote is created, update them here. The system will recalculate all pricing accordingly.
* Actions → **Update Exchange Rate**.

*Insert screenshot of exchange rate update prompt.*

**Other Operations**

**Manage Tasks**

* Organise your workflow with tasks for follow-up or reminders attached to each quotation.
* Actions → **Manage Tasks**
* Add or delete tasks as required.

*Insert screenshot of tasks list with add/delete options.*

**Manage Notes**

* Record supplementary information pertinent to the quotation at any time.
* Actions → **Manage Notes**
* Add or review notes as suitable.

*Insert screenshot of notes section with examples shown.*

**Manage Tags**

* Categorise and organise your quotes with tags. Tags from agents are automatically included and updated if the agent changes.
* Actions → **Manage Tags**
* Add new tags, or remove as needed.

*Insert screenshot of tags management area.*

**Communicating, Copying, and Cancelling Quotes**

**Email Quote**

* Directly send a quotation by email or download as PDF for your customer.
* Select a document template and cover letter as needed.
* Actions → **Email Quote**

*Insert screenshot of email quote screen with relevant fields marked.*

**Copy Quote**

To quickly create a similar quote:

* Actions → **Copy Quote**
* Choose which details (enquiry, customer, passengers) to include.
* Search by customer name or enquiry title to find references.
* Select exchange rate (current or previous), set recalculation options, and update service prices/date as needed.

*Insert screenshot of the copy quote screen with selection options.*

**Cancel Quote**

* To cancel, use Actions → **Cancel Quote**. You’ll be prompted for confirmation.
* Once confirmed, the booking is cancelled.

*Insert screenshot of cancel quote confirmation.*

**Remove Quote**

* To permanently delete, go to Actions → **Remove**.
* Confirm the action to remove the quotation from your records.

*Insert screenshot of remove confirmation.*

**Helpful Hints**

* **Use filters/search** on the Quotation List