**Set Up Customer Documents in moonstride**

*Professional, branded invoices and vouchers show your clients you mean business. In moonstride, you can personalise these documents to look just right for your agency, DMC, tour operator, or travel business before you begin sending quotes and bookings.*

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**1. Introduction**

In moonstride, your **invoices** and **vouchers** are the core documents clients receive, whether it's for a booking, a quote, or specific services. moonstride lets you adjust their layout, text, and branding—from fonts and banners to headers, footers, and colours—so that every document looks polished and ‘on-brand’. It’s essential to review and set these up before you start working with quotes and bookings.

**2. Customising Invoice & Voucher Documents**

**How to Find Document Templates**

1. Go to **Administrator > Settings > Voucher Document** in the moonstride main menu.
2. Use the **Document Type** field to search for a particular template or document style.

*Insert screenshot here of the Voucher Document settings page.*

You’ll see a list of existing **voucher** and **invoice templates**—these can be used for different travel services or customer communications.

**Editing Templates**

For any listed document template:

1. Enter your search criteria using the search bar (choose document type, template code, etc.).
2. Click **Search**.
3. Find the template you wish to modify and click the **Actions** gear icon.
4. Select **Edit** to open and customise the template.

If you prefer, you can send your required updates to our support team, and we’ll set up your templates for you.

*Insert screenshot here showing the template Actions menu.*

**Template Actions**

You can perform the following actions for each template:

* **Add**: Create a new document template from scratch.
* **Delete**: Permanently remove an unwanted template.
* **Copy**: Make a duplicate of an existing template to use as a basis for further customisation.
* **Preview**: See exactly how the template will appear to your clients before sending.
* **Status**: Activate or deactivate templates as required (toggle between Active/Inactive).

*Insert screenshot here showing the Add, Copy, Delete, Preview, and Status options.*

**3. Adding a New Template: Step-by-Step**

**How to Add or Copy a Template**

1. Click the **Add** button to set up a new template.
2. To base a new template on an existing one, use the **Copy** button next to the template you wish to duplicate.
3. When copying, rename your new template as desired and click **Save**.

*Insert screenshot here of the add/copy template screen.*

**Template Fields & Options Explained**

When creating or editing a template, fill in the following details:

**Required Fields:**

* **Document Type**: Select the category/type for this document (e.g., Invoice, Voucher).
* **Description**: Add a brief description for internal use.
* **Name**: Enter a clear template name.
* **Template Type**: Choose from available template styles in the dropdown.
* **File Name**: Specify a file name for the document.
* **Sell Channel**: If you use different sales channels (web, agent, direct), select which this applies to.
* **Mark as Default**: Set as default template for that category if needed.
* **Available Tags**: See which variable tags you can use to auto-personalise your documents (e.g., customer name, dates).

**Header Options**

* **Show Header**: Tick to display a header on the document.
* **Content Type**: Select the type of content (logo, image, text, etc.).
* **Show in First Page**: Show the header on the first page.
* **Show in Other Pages**: Repeat the header on additional pages.
* **Header Height**: Set the desired header height.

**Footer Options**

* **Show Footer**: Tick to display a footer.
* **Content Type**: Select the footer’s content type.
* **Show in First Page**: Show the footer on the first page only.
* **Show in Other Pages**: Repeat the footer.
* **Footer Height**: Adjust as needed.

**Page Content**

* **Content Type**: Indicates whether the template uses the system default or a custom setup.
* **Body Content**: You can edit the main text that will appear on your invoice or voucher email.

*Tip: Remember to click* ***Save*** *after editing or adding your template.*

*Insert screenshot here of the full template edit screen.*

**4. Template Examples**

Here are some standard template names and what they’re used for. You can customise them or send us your updated copies to be loaded into your account:

* **BOVOU-TYPE1** – “Customer Document - Booking Voucher”
* **EMQUG-TYPE1** – Customer Document – “Email A Quotation” – Template 1 (moonstride provides 3 template options)
* **CIVOU-TYPE1** – “Customer Document - Customer Invoice” – Template 1 (moonstride provides 3 template options)

**BOVOU - Booking Voucher Example**

Dear [#LEADNAME#],

Greetings for the day!

Thank you for booking with [#Company Name#].

I am pleased to enclose the travel documents for your upcoming trip.

Yours Sincerely

**CIVOU - Booking - Customer Invoice Example**

Dear [#LEADNAME#],

Greetings for the day!

Thank you for booking with [#Company Name#].

We can confirm receipt of [#CUSTOMERINVOICETOTALPRICE#] towards your trip is being processed. The balance of your trip is currently [#CUSTOMERINVOICEBALANCEAMOUNT#].

Yours Sincerely

**5. Frequently Asked Questions**

**Q: Can I have different templates for each service or channel?** A: Yes, you can create unique templates and set defaults per document type or sales channel.

**Q: What are “tags” in templates?** A: Tags are placeholders (such as [#LEADNAME#]) that are replaced with real customer or booking details automatically when documents are sent.

**Q: Can I edit templates later?** A: Absolutely, you can return to the template list at any time to edit, preview, or copy templates as your needs change.

**6. See Also**

* [Document Branding & Logos](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)
* [Email Communications Setup](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)
* [Go Live Checklist](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)
* [Customer Document Tags & Variables](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)

**Summary & Next Steps**

Setting up your invoice and voucher templates puts your best professional image forward from day one. Be sure to use the preview function to see your new template in action. If you need help, our support team is ready to update or load templates for you.

**Need more guidance?**

View our help articles above or get in touch for hands-on support.