**Set Up Enquiry Follow Up in moonstride**

*Manage your sales workflow proactively with structured follow-ups for every enquiry. Scheduling, tracking, and updating follow-ups ensures timely action and supports better customer service throughout the sales journey.*

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**1. Follow Up Overview**

Follow up functionality allows you to schedule and monitor tasks such as returning calls, replying to emails, sending estimates, and handling customer questions or special requests. Each follow up has a set date and time, includes notes, and is always visible in the Enquiry List for clarity and fast action.

**2. Create Follow Up**

To set a follow up for a specific enquiry:

1. In the **CRM → Enquiry → Enquiry List**, locate the enquiry you wish to follow up.
2. Click the **Actions** gear icon and select **Follow up**.

*Insert screenshot here showing the Actions menu and "Follow up" option.*

1. On the Follow Up screen, fill in the following mandatory fields:
   * **Status:** Choose the relevant follow up status (New, In process, Confirmed, Cancelled). *Insert screenshot here of the Status dropdown.*
   * **Next follow up date:** Select the date and time for your scheduled follow up.
   * **Follow up Notes:** Enter a brief description or details relevant to the enquiry.
   * **Special request:** (Optional) Record any customer-specific request or need.

*Insert screenshot here showing all follow up input fields.*

1. Click **Save**.

Once saved, your next follow up date and its status will display in the Enquiry List for that enquiry.

*Insert screenshot here showing the Enquiry List with Next Follow up column.*

**3. Update Follow Up Status**

When you’ve responded to the customer or want to schedule another follow up step, you can update the status or set a new date:

1. Return to the **Enquiry List** and click **Actions > Follow up** for the relevant enquiry.
2. In the follow up management screen, select **Actions > Edit**.
3. Update any field: new **Next follow up date**, revised **Status**, extra **Follow up Notes**, or add new special requests.

*Insert screenshot here showing the Edit action in the Follow up screen.*

1. Click **Save** to confirm your updates.

**4. Delete Follow Up**

To remove a follow up for an enquiry:

1. In the **Enquiry List**, use **Actions > Follow up** on the chosen enquiry.
2. In the follow up list, click the **Actions** gear icon and then **Delete** for the specific follow up you wish to remove.
3. A warning dialogue will ask "Are you sure?"
4. Click **OK** to permanently delete the follow up.

*Insert screenshot here showing the Delete follow up action with confirmation prompt.*

**5. See Also**

* [Managing Enquiry](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)
* [Enquiry Pipeline Management](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)
* [Task Management for Sales](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)

**Summary**

Consistent, well-tracked follow ups are essential for effective enquiry management. Creating, updating, and deleting follow up tasks is straightforward in moonstride and always accessible through the Enquiry List and Actions menus. Follow the provided screenshot steps for a seamless workflow.