**Set Up Enquiry Notes in moonstride**

*Record, organise, and share important information on each enquiry. Notes provide an easy way to capture details, requests, and internal messages, ensuring nothing is overlooked as enquiries progress to quotations and bookings.*

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**1. Notes Overview**

Enquiry notes let CRM users add extra information linked to an enquiry—whether internal updates, supplier instructions, customer requests, or contractual references. Each note is grouped under a “Note Type” and can be set to show on relevant documents, or kept internal only.

* **Add Notes:** Use to add new notes for a selected enquiry, choosing the note type, visibility, and content.
* **View Notes:** Review all existing notes linked to an enquiry. Notes are visible in the pop-up that shows when clicking "Notes" in the Actions menu.

**2. Add a New Note Type**

If you need to categorise notes differently, you can create new note types in the system.

**Navigation:** Go to **Widgets > Widget > Note type**, then click **Add** to define a new type. You can use any of the system note types already available, or add more as required for your workflow.

**Common Note Types:**

* *Guide Specific*: Notes for the tour guide
* *Internal*: Private notes for your own team, not shared outside
* *Special Request*: Notes for specific customer requests
* *Amendment*: Notes about requested changes
* *Supplier*: Notes directed to suppliers
* *Terms & Condition s*: Legal or policy-related notes
* *Registration*: Customer sign-up info
* *Ground Handler Notes*: Shown to suppliers or ground handlers
* *My Tour Note*: Tour-specific notes

*For more details about adding, editing, or deleting Note Types, see the Manage Notes section.*

**3. Add a Note in Enquiry**

To attach a note to an enquiry:

1. In the **CRM > Enquiry > Enquiry list**, find the enquiry and click **Actions > Notes**.
   * *A pop-up will show all current notes for that enquiry.*
2. Click the **Add** button in the note pop-up window.
3. Complete the following fields:
   * **Note Type:** Choose from the dropdown (options as described above).
   * **Title:** Short heading for your note (e.g., "Special dietary request").
   * **Description:** Full note content or instruction.
   * **Show On:** Select where the note should be visible (Invoice, Booking Voucher, Supplier Notification).
4. Click **Save**.

*All notes saved at enquiry level are automatically carried forward to quotations and bookings as the enquiry progresses. Notes remain editable or removable as needed.*

**4. Edit Note in Enquiry**

To update a note already attached to an enquiry:

* Go to **CRM > Enquiry > Enquiry list**, click **Actions > Notes** for the chosen enquiry.
* In the note pop-up, locate the note you wish to edit and choose **Edit**.
* Update the note type, title, description, or show-on documents as required.
* Click **Save**.

**5. Delete Note in Enquiry**

To remove a note from an enquiry:

* Go to **CRM > Enquiry > Enquiry list**, click **Actions > Notes**.
* Find the note to delete, then use the **Delete** option (bin icon or delete button).
* Confirm in the prompt to remove the note permanently.

*Note: Editing or deleting notes does not disrupt the quotation or booking process, but may remove information from future documentation if so configured.*

**6. See Also**

* [Manage Notes for Quotations and Bookings](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)
* [Setting Up Note Types and Categories](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)
* [Enquiry Management and Best Practices](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)

**Summary**

Enquiry notes in moonstride provide a simple but essential system for recording, categorising, and sharing details from early leads through to completed bookings. Use the Add, Edit, and Delete features to keep communication thorough and clear throughout your team and with external partners.