**Set Up Enquiry Tasks in moonstride**

*Plan and track every call, meeting, email, or to-do connected with your enquiries. The enquiry tasks feature makes it simple to organise your sales activities, assign work to team members, and follow up with customers effectively as you move from lead to booking.*

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**1. Enquiry Tasks Overview**

Enquiry tasks let you record and assign any activity—such as a phone call, meeting, to-do, or email—that’s required to progress a lead or nurture a customer relationship. Tasks can be linked to specific enquiries, assigned to internal staff, have priorities and deadlines set, and will be shown both at enquiry level and in your moonstride dashboard under 'Task List'.

**2. Adding a Task to an Enquiry**

To add a new task related to an enquiry, go to **CRM > Enquiry > Enquiry List**. Find the relevant enquiry and click the **Actions** gear icon, then select **Task**.

A dedicated pop-up will open displaying all current tasks connected to that enquiry. To add a new one, select **Schedule Task**.

You’ll be brought to a form where you can enter all key information:

* **Type of Task:** Choose Call, Meeting, To Do, or Email depending on what action needs to be taken.
* **Task Name:** Enter a clear, descriptive name for the task so it’s easy to identify (e.g., “Call to confirm travel dates”).
* **Start & End Date and Time:** Set the times for when the task should be started and completed.
* **Priority:** Set as High, Medium, or Low, so urgent actions stand out.
* **Status:** Indicate if the task is currently Open, Closed, or On Hold.
* **Assigned By / Assigned To:** Specify who is creating the task and which colleague or staff member it’s assigned to. This ensures team accountability.
* **Linked To:** Displays the customer or enquiry this task is associated with, so all actions are tied to the correct lead.
* **Description:** Add any useful comments or instructions about what needs to be done.

After completing all necessary fields, click **Save**. The task will be logged against the enquiry and will also appear on the main dashboard Task List.

**3. Viewing and Managing Enquiry Tasks**

To view all tasks for a particular enquiry, use the **Task** option in the Actions menu of the enquiry list. Here, you can:

* See all scheduled tasks linked to the enquiry, including their type, status, and due dates.
* Edit any existing task by selecting it and updating the necessary details.
* Remove obsolete or completed tasks if necessary, keeping the list current and actionable.

Tasks scheduled via this section are also displayed on your overall dashboard, helping keep your entire team aligned across leads, to-dos, and deadlines.

**4. See Also**

* [Managing Enquiry](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)
* [Set Up Enquiry Follow Up](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)
* [Set Up Enquiry Notes](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)
* [Manage Tasks for Quotations and Bookings](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)

**Summary**

With moonstride’s Enquiry Tasks feature, you never lose track of what needs to happen next. Assign work, follow up efficiently, and view all activity in one place—so every lead gets the attention it deserves from first contact to conversion.