**Set Up Source of Enquiry in moonstride**

*Identify and manage every channel that brings you new business. Track whether an enquiry began with a campaign, returning customer, newsletter, or other method for better marketing insight and control.*

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**1. Source of Enquiry Overview**

Sources of enquiry tell you how each lead entered your sales pipeline—whether through marketing (e.g., “Black Friday”, “Newsletter Ad”), repeat customers, or direct advertising. Setting this up in moonstride gives you clear, reportable data.

**Navigation:** Go to **CRM → Enquiry → Source of Enquiry**.

*Insert screenshot here showing the full Source of Enquiry screen, as in your reference image.*

The list shows all configured sources, including:

* **Name** (e.g., Black Friday, Newsletter Ad)
* **Description** (e.g., campaign details, referral method)
* **Status** (Active/Inactive)
* **Sort Order** (controls display order in dropdowns)
* **Actions** (Edit, Delete)

**2. Add Source of Enquiry**

To create a new source:

1. Click the **Add** button in the top right.
   * *Screenshot: Blue Add button on Source of Enquiry screen*
2. Fill in the following fields:
   * **Name:** Name of the source, e.g. "Black Friday", "Newsletter Ad".
   * **Description:** Further details about the source (e.g., "Black Friday social media campaign").
   * **Status:** Ensure this is set to **Active** to show in lists.
3. Click **Save**.

Your new source will be listed with Name, Description, and Active status, ready to be mapped to new enquiries.

**3. View Source of Enquiry**

View, filter, and manage all sources on one page:

* **Status:** Top filter bar lets you view only Active, Inactive, or All sources.
* **Table Columns:** Name, Description, Status, Sort Order, Actions.
* **Enquiry Mapping:** Each time you add or edit an enquiry, you can select any of these sources.

*Insert screenshot here showing the Source of Enquiry listing, with actual examples (“Black Friday”, “Has booked previously”, “Newsletter”, “Newspaper Ad”).*

**4. Edit Source of Enquiry**

To change details of any source:

1. Click the **Actions** gear icon next to the source you want to update.
2. Select **Edit** from the dropdown menu.
   * *Screenshot: Actions menu expanded with Edit highlighted*
3. Update the Name, Description, or Status as needed.
4. Click **Save** to confirm your changes.

**5. Delete Source of Enquiry**

To permanently remove a source:

1. Click the **Actions** gear icon beside the source.
2. Select **Delete** from the menu.
   * *Screenshot: Actions menu expanded with Delete highlighted*
3. Confirm in the pop-up dialog to complete the deletion.

**6. Sort and Sequence Source of Enquiry**

* **Sort Order:** Each source has a **Sort Order** box. Change the number to set the dropdown or display order in all selection menus.
* After updating sort numbers for one or more sources, click **Save Sequence** (top right) to lock in your preferred order.

*Screenshot: Sort Order boxes with Save Sequence button highlighted.*

**7. Pagination and Display Controls**

* Use the **Display** dropdown to control how many sources show per screen (e.g., 4 per page).
* Navigation arrows and page selector at the bottom let you browse all source entries if you have many sources.

*Screenshot: Pagination controls with record count, display dropdown, and navigation arrows.*

**8. See Also**

* [Managing Enquiry](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)
* [Tagging and Organising Leads](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)
* [Analytics & Reporting on Source Performance](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)

**Summary**

Setting up sources of enquiry in moonstride gives your team the power to analyse, report, and improve your lead acquisition strategy. Use the Add, Edit, Delete, Sort, and Status controls in the Source of Enquiry page to keep your system accurate and organised. Refer to the screenshots above for guidance at every step.