**Set Up Templates for Email Notifications in moonstride**

*Customise your customer and supplier communications from day one. In moonstride, you can tailor the words, style, and branding of every email sent from your platform—ensuring your messages are always accurate, compliant, and perfectly on-brand.*

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**1. Introduction**

Email templates in moonstride control the look and content of all automated messages sent to your customers and suppliers. By updating these templates, you can:

* Insert your logo and business colours into headers and footers
* Preview, edit, and personalise standard emails (quotes, invoices, vouchers and more)
* Ensure messaging is always professional, up-to-date and matches your brand voice

**Tip:** It’s wise to update or review your key templates before sending your first booking or customer quote.

**2. Managing Email Templates**

**Navigating to Email Templates**

1. Go to the top navigation menu.
2. Click **Administrator > Settings > Email Templates**.

*Insert screenshot here of Administrator > Settings > Email Templates*

**Actions You Can Take**

From the **Email Templates** screen, you can easily manage all your email communications.

* **Add** – Create a new email template from scratch
* **Search** – Find or filter existing templates by name, type or content
* **Edit** – Update the content or settings of an existing template
* **Copy** – Duplicate an email template to create a new version with similar format
* **Delete** – Remove any template you no longer need
* **Status** – Toggle a template between Active/Inactive (to control which are in use)
* **Preview** – View how your email will appear to recipients before sending

*Insert screenshot here showing all template action buttons and their positions*

**3. Adding or Copying an Email Template: Step-by-Step**

**Adding a New Template**

1. Click on the **Add** button.
2. (Alternatively, use **Copy** next to an existing template to duplicate and modify it.)
3. After copying, give your new template a clear name and click **Save** to start editing.

*Insert screenshot here of the “Add” and “Copy” screen*

**Key Fields and Settings Explained**

When creating or editing an email template, complete these fields:

* **Email Category**: Choose the type of email (e.g., Invoice, Itinerary, Voucher, Quote, etc.)
* **Description**: Briefly describe what the email template is for (internal use)
* **Name**: Provide a meaningful template name
* **Template Type**: Pick from available styles in the dropdown
* **Content Type**: Set whether the content is System Default or Custom (user-edited)
* **Mark as Default**: Tick to make this the default for that category
* **Sell Channel**: Specify which sales channel (if you have multiple e.g., web, agency)
* **To, CC, BCC, Reply To**: Enter recipients’ email addresses where applicable
* **Subject**: Add an email subject line. You can use tags such as [#NAME#], [#BOOKINGREF#], etc. for dynamic content
* **Available Tags**: See a list of all variables you can use for personalisation (click to insert)
* **Body Content**: Type or update the main content of your email. Use tags for customer names, booking references, payment amounts, and more.

**Don’t forget to click ‘Save’ after making changes!**

*Insert screenshot here of template edit form showing the key fields and tag options*

**4. Examples of Common Email Templates**

moonstride provides several default templates. Here are examples you’ll want to review, update, or send to our team for loading onto your platform. **Do not change the names or codes of these templates.**

**EMAQU – Email Quote**

Dear [#NAME#],

Thanks for your interest in [#Company Name#], you are one step closer to the tour. Please find your quote [#QUOTREF#] attached.

To book now please call [#Company Phone#] or [#Company Email#] to be connected to our team. In order to confirm the booking, we will need full names, dates of birth and passport information for each passenger.

Please carefully check that all details are correct and if you have any questions about your trip, please feel free to contact us.

**CIVOU – Customer Invoice**

Dear [#NAME#],

We can confirm receipt of [#CUSTOMER INVOICE TOTAL PAID#] as a payment towards your trip.

Your balance of [#CUSTOMER INVOICE BALANCE AMOUNT#] is due by the [#CUSTOMER INVOICE BALANCE DUE DATE#]. Please find your invoice attached for booking reference [#BOOKINGREF#].

If you have any questions about your trip, please feel free to contact us.

**HOVOU – Accommodation Voucher**

Dear [#NAME#],

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

Please find your Accommodation Confirmation [#BOOKINGREF#] attached.

Please carefully check that all details are correct and if you have any questions about your trip, please feel free to contact us.

**BOVOU – Booking Voucher**

Dear [#NAME#],

You're just a few days away from your holiday and we are pleased to provide your travel documents for your upcoming trip & booking reference is [#BOOKINGREF#]. Before you dive into the detail, here are a few things we recommend you do before you leave.

If you have any questions about your trip, please feel free to contact us.

**Check your documents**

Simply click on the link above to view your documents. Please check through your itinerary and if there are any errors, please contact your consultant immediately. Is your passport valid for at least six months? If not, you will need to renew your passport.

**Do you have a special request?**

If you require any special requests such as meals or accessibility requirements, please let your consultant know no later than 7 days before your departure date.

**Arrive at the airport**

Arriving early at the airport can save you a lot of stress. Not only will you arrive as cool as a clam, but you’ll also have plenty of time to top up on sweets for the flight or do a spot of duty-free shopping.

**QSITL – Share Itinerary Link – Quotation**

Dear [#NAME#],

Good day to you!

Thank you for giving us the opportunity to help you with your upcoming travel arrangements; it has been a pleasure for us.

We have been helping travelers create wonderful holiday experiences for years, and we hope you will benefit in the same way. Here's wishing you a beautiful vacation ahead!

We have carefully reviewed your holiday preferences, and specially chosen the below package for you. Please review the information and let us know if you would like to make any further changes to this plan.

**EMTSR – Supplier Mail From Supplier Request Confirmation Page**

Dear [#SUPPLIERNAME#],

We would like to confirm the following quotation under our reference [#QUOTATIONREF#]. Can you please confirm this quotation with us by clicking the link below, selecting the status option, adding your confirmation number and any additional notes for the quotation.

If you have any questions, please do not hesitate to contact us

**5. Frequently Asked Questions**

**Q: Can I edit templates after creating them?** A: Yes! You can update, preview, or copy any template at any time within Administrator > Settings > Email Templates.

**Q: What are tags?** A: Tags (like [#NAME#] or [#BOOKINGREF#]) are placeholders that pull live data into your message, so each customer receives personalised communication.

**Q: Can I have different templates for different sales channels or services?** A: Absolutely. You can create unique templates and set which ones are the default for each channel or service type.

**6. See Also**

* [Set Up Customer Document Templates](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)
* [Document Branding & Logos](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)
* [Comprehensive Go Live Checklist](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)
* [Managing Tags & Variables in Communication](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)
* [Customer Communications Settings](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)

**Summary & Next Steps**

Take a few minutes to ensure your email templates are ready—this helps your brand start strong and assures customers of your professionalism on every booking, quote, or itinerary you send. For further help or to have our team load templates on your behalf, just reach out to our friendly support team.

**Preview every message before activating new templates for peace of mind.**