**Source of Customer in moonstride**

*Track and manage the origin of every customer—whether found via advertising, referral, marketing campaigns, or partnership—so you can report, filter, and optimise your lead acquisition strategies.*

**Table of Contents**

1. Source of Customer Overview
2. Add Source Of Customer
3. Edit Source Of Customer
4. Delete Source Of Customer
5. Search Source Of Customer
6. See Also

**1. Source of Customer Overview**

"Source of Customer" lets you list, edit, and control all the ways customers learn about your business—keeping every customer’s origin point documented for accurate analysis and reporting.

**Navigation:** CRM → Customer → Source Of Customer

[Insert screenshot here: Source Of Customer listing screen showing Add button, filters, edit, delete, and status columns]

**2. Add Source Of Customer**

* Click the **Add** button at the top of the Source Of Customer screen.
* Enter the following fields:
  + **Name:** The source name (e.g. "Referral", "Social Media Campaign")
  + **Description:** Brief details about the source
  + **Status:** Set as Active so it appears in future dropdowns and selection lists
* Click **Save** to add the source.

[Insert screenshot here: Add Source of Customer form]

**3. Edit Source Of Customer**

* In the Source Of Customer list, click the **Sel** column (or Edit icon) for the source you want to change.
* Update the necessary fields (Name, Description, Status).
* Click **Save** to apply changes.

[Insert screenshot here: Edit Source of Customer form or row]

**4. Delete Source Of Customer**

* In the Source Of Customer list, click the **Sel** column (or Delete icon) for the item you wish to remove.
* An alert dialogue will appear; confirm by clicking OK to delete, or Cancel to keep.

[Insert screenshot here: Delete confirmation pop-up/dialog]

**5. Search Source Of Customer**

* Use the **Filter** button at the top to search sources based on name, description, status, or custom criteria.
* Use the **Reset** button to clear filters and show all sources.

[Insert screenshot here: Filter/Search bar above Source of Customer list]

* Change status quickly by clicking the **Active/Inactive** label next to a source.
* Use the **Sort Order** column to set the order in which sources appear in dropdowns or on forms. Enter your preferred order number and click **Save Sequence** at the top right.

[Insert screenshot here: Sort Order input fields and Save Sequence button]

**6. See Also**

* [Source of Enquiry](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)
* [Customer Creation and Import](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)
* [Customer Reporting and Analytics](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)

**Summary**

The Source of Customer module in moonstride helps you catalogue and control where every new client comes from. Edit, search, filter, or deactivate sources as your business evolves, and sort them to guide staff and report with clarity. Use the screenshot placeholders to create a comprehensive visual manual.