Administration

Menu - Administration. All setup related information.

- Classic programs
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- Holidays
- Image categories
- Images
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Classic programs

Menu: Administration ? Administration ? Sales ? Classic program

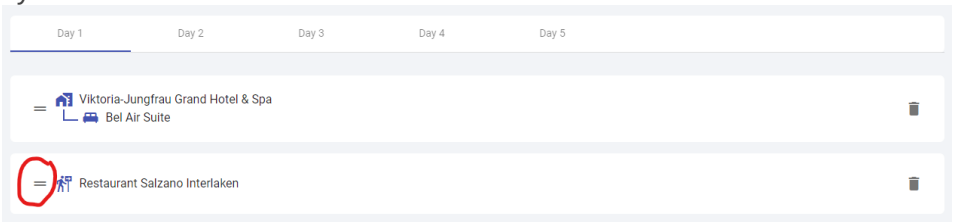
What

The classic program is a fixed program of product templates. It can be added directly to an offer/confirmation as an entire program without having to add individual product templates. The classic program can be defined over several days.

https://www.youtube.com/embed/Zts_EyimrmM?wmode=opaque

Create a classic program

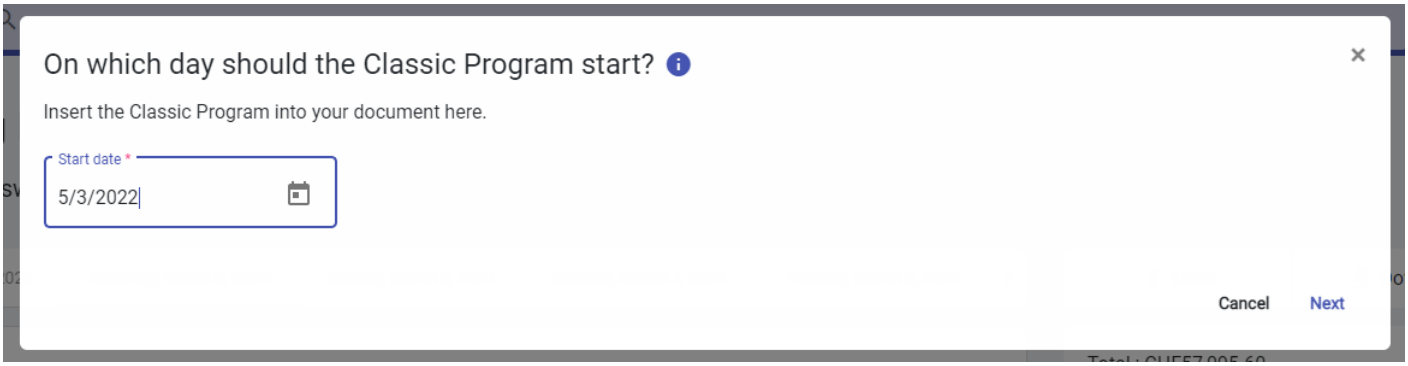
1. Classic programs are created in the admin area under: Administration ? Administration ? Sales ? Classic program
2. Give the classic program a name and define the duration of the program in days.
3. Add product templates. You can also drag the product templates to other days using the drag and drop symbol.



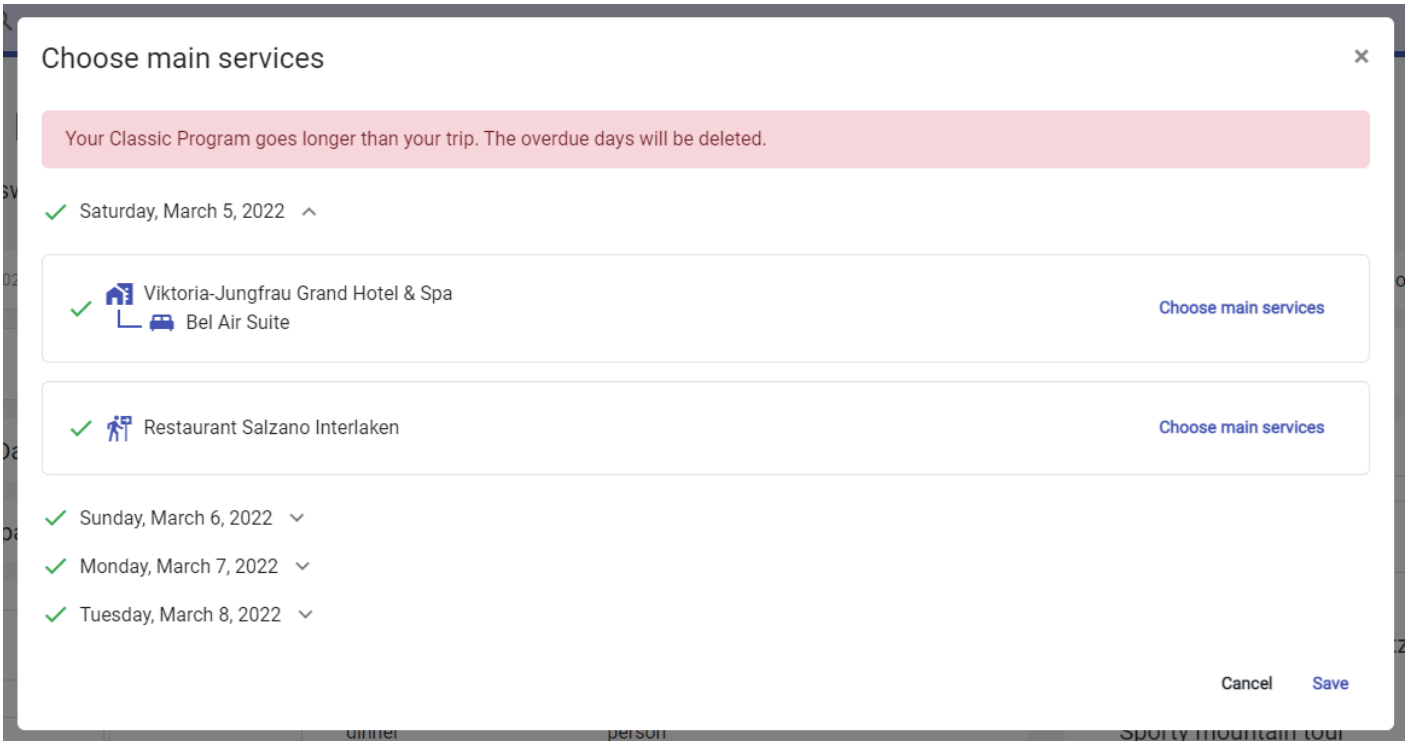
Add a classic program to an offer/confirmation

Select the classic program from the panel on the right.

Add the classic program and select the start date.
If your classic program is longer than your trip, the overdue days will be deleted.



For each product template in the classic program, prices can be defined/services selected when adding to a document.



The prices for the classic program consist of the main services of the product templates in the classic program. Additional services must be added manually at a later step.

If your classic program lasts longer than your trip, the overdue days are deleted.

Company types

Menu: General ? Company types

What

Individual company types can be entered and later assigned when creating new companies (also suppliers).

Company types are helpful for creating reports. You can group your customers for example by "Virtuoso" and see how much turnover, margin, etc. you have generated with these customers.

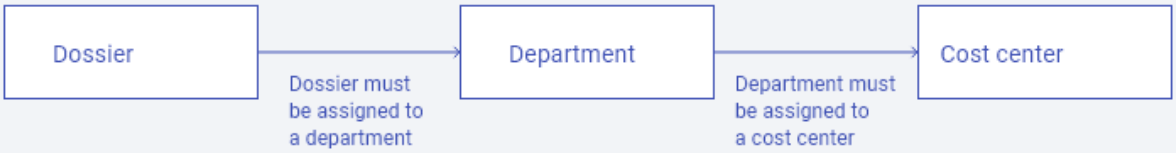
Departments

Menu: General ? Departments

What

If your organization has different departments, they can be defined here. For each department, you have the option of working with cost centre numbers that are linked to the accounting system. This is useful if you have several departments, but they bill differently.

When you create dossiers later, you will find a mandatory field where you have to assign a predefined department.



Document notes

Menu: Exports ? Document notes

What

Document notes are textual contents that can be attached by creating a new document in a dossier, for example bank details on the invoice.

Where to use?

Company ? Location ? Dossier ? Documents

Create a new document with the same type (Offer Incoming and Confirmation Incoming) as the document note and then the note is automatically attached.

Employees

Menu: General ? Employee

What

Here you can register all your employees and assign them their appropriate roles with the corresponding authorizations. You can only create as many users as you have licences.

> You can always contact us, if you need to upgrade your licence quota.
> **Contact us.**

Staff members can be deactivated. Deactivated employees no longer appear in any selection list, their user account is set to inactive, and they are not counted towards the licence quota. If the status of an employee is changed from deactivated to activated, the licence limit must be observed.

Create and edit

After the creation of an employee, they will receive an invitation email to advatra and have to set a password. This email has a validity of 24 hours. Read more here.

To simplify access and setup of the first steps, we recommend giving every employee the role of an administrator. Later, you can always structure the roles the way you need it.

File templates

Menu: Exports ? File templates

What

Templates can be created for itineraries, invoices or vouchers. Each template is assigned to a type: Document, Trip, Receipt, Calculation.

Invoice, Prepayment ? Document
Itinerary ? Travel
Itinerary with offer or confirmation ? Travel
Voucher ? Voucher

> **DOCX Templates**
> To update the templates, we recomment to download our example in the system.
> Learn more about the DOCX templates

We can assist you with creating templates with our advisory packages.

Please contact us for this.

Forms

Menu: Web portal ? Forms

What

A form can be any type of feedback that can be filled out by external people and returned to the form creator. For example, travel feedback.

There are two different types of forms: Dossier forms and surveys.

Surveys are public surveys and can be viewed under the main menu item Web portal. There, a link can be copied and sent to external persons.

Dossier forms are forms that are always attached to a dossier. The responses of a dossier form is visible directly on the dossier view.

Form types

Survey
Are public surveys. These can be sent to external persons with a link under Web portal ? Survey.

Dossier
A form can be attached to a dossier. This can be, for example, a billing reminder for an agency or a guide. DMC creates a form and sends it to the agency or guide as a payment reminder. The form then states that the agency or guide should provide their contact and account details so that DMC can pay.

Form statuses

No status
The admin creates a new form template.

Open
An employee selects the form template with the number of expected responses.

Filled out
All expected persons have responded to the form.

Approved
The employee/dossier manager has confirmed by clicking on the tick that the form has been completed by all and thus confirms the form.

Processed
The accounting department clicks on the tick to confirm that, for example, the commission has been paid in.

Create a from

Administration ? Web portal ? Forms
The administrator creates form templates here, which the employees can use.

Company ? Company ? Location ? Dossier
In the Dossier Forms section, they can select a template from a form created by the administrator. In doing so, he specifies how many responses he expects.
As soon as everyone has filled out the form, the status changes to Filled out. The employee can then approve the form for the accounting department.

Menu ? Administration ? Dossier forms
The accounting department has an overview of all dossiers here.

Menu ? Web portal ? Surveys
Overview over all survey forms and their response.

Holidays

Menu: General ? Holidays

What

The general holidays are entered here. If you work with product templates and subproduct templates, you will be informed that the products are not/only limited available on the holidays you have entered.

> Recurrently refers to all dates that occur on the same date each year. For example, 1 January. Whereas Easter is not recurrently, because Easter is always on a different date.

Image categories

Menu: Sales ? Image categories

What

This is important for the search function for images. Here, individual image categories can be entered and later assigned when uploading new images. This is helpful for the search/filter function for images.

Images

Menu: Sales ? Images

What

> Before adding images to the gallery, you must define categories under **Image Categories** so that the images can be assigned to these categories and can be found more easily when compiling products.

This is your individual image database. You can upload any image of any size, the system will automatically format it. Just give the image a name and select one of your predefined categories and destinations. Image description is optionally possible.

Locations

Menu: General ? Locations

What

Locations are important for the later search function for products and refines the search by geographical characteristics. The Location component is summarized in a tile with 3 different sizes (Small, Medium, Large). However, you are free on the way you want to use these 3 sizes, which restricts the search from large to small.

> It is important that the structure of the three levels is always thought of from the smallest unit.

Large: e.g. Country = USA
Medium: e.g. Federal States = California, Florida, Texas, etc.
Small: e.g. Cities = Los Angeles, Miami, Dallas, etc.

Again, these are just examples, you can use these 3 characteristics the way it's best for your individual needs. Therefore, it's important to think first about how you want to narrow down the product search for your markets.

Create and edit

1. Create large locations
2. Create medium locations and assign them to a large location
3. Create small locations and assign them to a medium location

Microsoft 365 - E-Mail Sync

Menu: Technical ? Microsoft 365

What

Advatra can connect with your Microsoft 365 tenant. With this integration, advatra will automatically collect the E-Mails of your employees and link it to the corresponding dossiers.

You will have to add the dossier number to the subject of your e-mails, and you're done!

Activate

To connect to Microsoft 365:

1. Click on the "**Register**" button
2. Login with your company account of Microsoft 365
3. You will see a prompt to allow advatra access to these properties:
    1. Read mail in all mailboxes
    2. Sign in and read user profile
4. Click on "**Accept**"
5. Now your e-mails are synced with advatra!

Text templates

Menu: Export ? Text templates

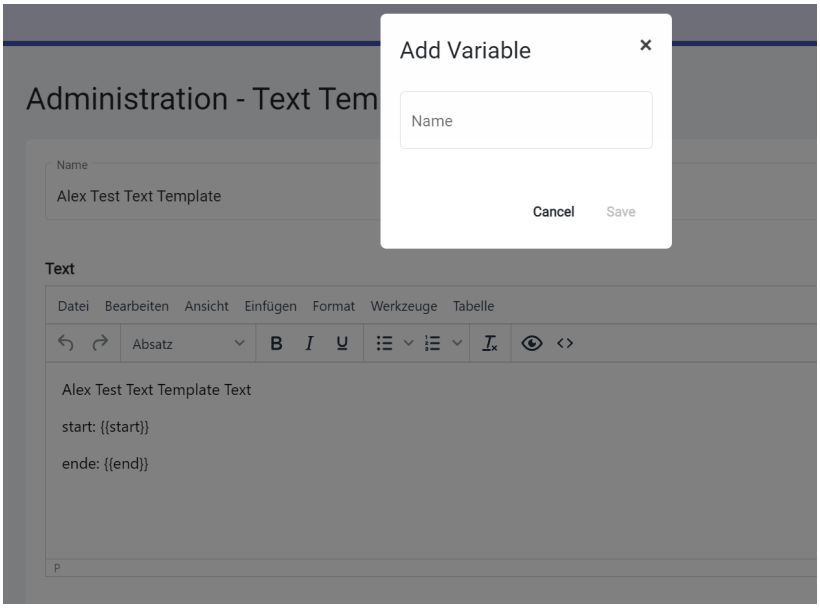
What

Text templates are individually created texts that can then be manually copied into a document as desired. This means that they do not always have to be rewritten.

Create and edit

How to create text templates and where to use them?

Create a text template and add the text you want to reuse. Variables can also be added. You will have to enter the value vor the variables when adding the template to a text editor.



The text templates can be used in any editor in the advatra system:



VAT

Menu: General ? VAT

What

If your organization works with different VAT rates, these can be defined here.

A 0 percent VAT must be set up. This VAT is used for surcharges that are not VAT-relevant.

When you later create products, offers and more or simply manage prices, you will find a mandatory field where you must assign the prices to a predefined VAT.

So the ID is predefined by the accounting system. As we can link advatra to the accounting system, in this case the booking is automated if the ID is entered correctly in the VAT.