Sales

Everything you need during your daily business!

- Availabilities
- AXUS
- Companies
- Contacts
- Documents
- Dossiers
- GDPR requests
- Marketing codes and sales activities
- Suppliers

Availabilities

Menu: CRM ? Availabilities

What

Availability of guides, drivers and tour guides can be entered and checked. Internal employees can enter their availability via a login. Other persons via an external link.

Create and edit

How can I enter availabilities?

Internal employees with login can enter their availability directly in the menu under Availabilities.

Other persons, like **Guides**, can be entered under Administration ? Sales ? Guide. On the overview page of all guides, a link to the calendar with the availabilities can be sent via the email symbol.

AXUS

Menu: CRM ? Company ? Location ? Dossier ? Choose a doument (Offer, Confirmation)

What

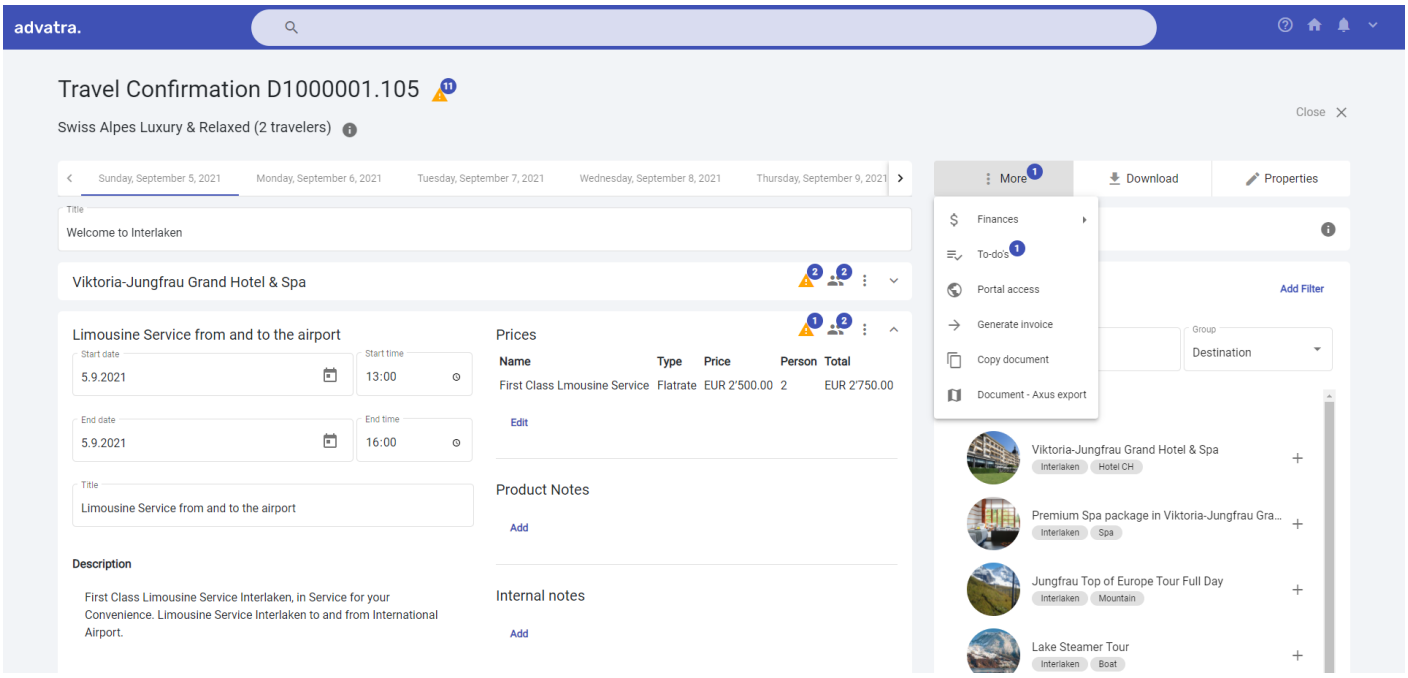
AXUS is a software for travel planners and tour operators to create itineraries from a single source, quickly and with the appropriate CI look. AXUS is integrated with advatra. Please contact us for an AXUS integration.

> Every itinerary sent from advatra to AXUS will count as a "itinerary credit" on AXUS.
> You will see an overview over your credits directly on AXUS.

Create and edit

Itinerary export with AXUS:

1. Select the document (Offer or Confirmation) you want to export.
2. Select "Document - AXUS export" under "More" on the right.



Companies

Menu: CRM ? Companies

What

Companies are all types of companies, except suppliers, mostly B2B customers. All invoices, vouchers, delivery bills and other important documents are linked there.

Note: If you wish, we can also automate the data import if you have many companies that you want to import. Please contact us for this.

> Before you create a new company, the following information must be stored in the system:
> Company type and departments.

Create a company

First Name: If it has an official company name, just leave the first field open and enter the company name in the next field.

Name/Company: If it does not have an official company name, just enter first name in field one and family name in field two.

Create a location

You can create multiple locations for one company and manage it here. When you create dossiers (projects) and documents later, they will be subordinated to the locations.

Create a contact

In the contact widget, you create contacts that belong to this company and location.
The best thing to do first is to create a travel agent with all the contact details.

Contacts

Menu: CRM ? Contacts

What

Here you get an overview about all your contacts (customer and supplier) and the function to edit. Contacts are always attached to a company or supplier location.

Create and edit

> If you wish, we can also automate the data import if you have a large number of companies that you want to import.
>
> **Please contact us for this.**

1. Click on Companies or Suppliers
2. Click on the company that contact belongs to
3. Click on the location that contact belongs to
4. Create a new contact in the menu contacts.

Documents

Menu: Companies ? Company ? Location ? Dossiers ? Documents

What

Documents are all types of information carriers such as offers, invoices, itineraries, etc. All types of documents are stored in a dossier and linked to a customer: Offer, confirmation, invoice, etc.

A dossier is always linked to a travel agent (an external employee of the company).

- Customer sends an inquiry.
  - A dossier is created, assigned to an external travel agent (from Company XY) and attached to a location.
  - A document is created in the dossier.

See also **sales process.**

Create and edit

After you have created a company with a location and a dossier, you can create your first document in a dossier.
Learn how to create your first offer/itinerary here.

Dossiers

Menu: Companies ? Company ? Location ? Dossiers

What

A dossier is always linked to a location, and this location to a company. All types of documents are stored in a dossier: Offer, confirmation, invoice, etc. A dossier is always linked to a travel agent (an external employee of the company).

An automatic follow-up is created when the dossier is created. This is currently 14 days after creation. The duration can be set in days in the Global Settings.

Create a dossier

After you have created a company and a location, a dossier can be created at the location level. The dossier summarizes all the information about a trip.

Opening date
On which day the dossier is opened.

Travel Advisor
Which Travel Advisor is responsible on the client side.

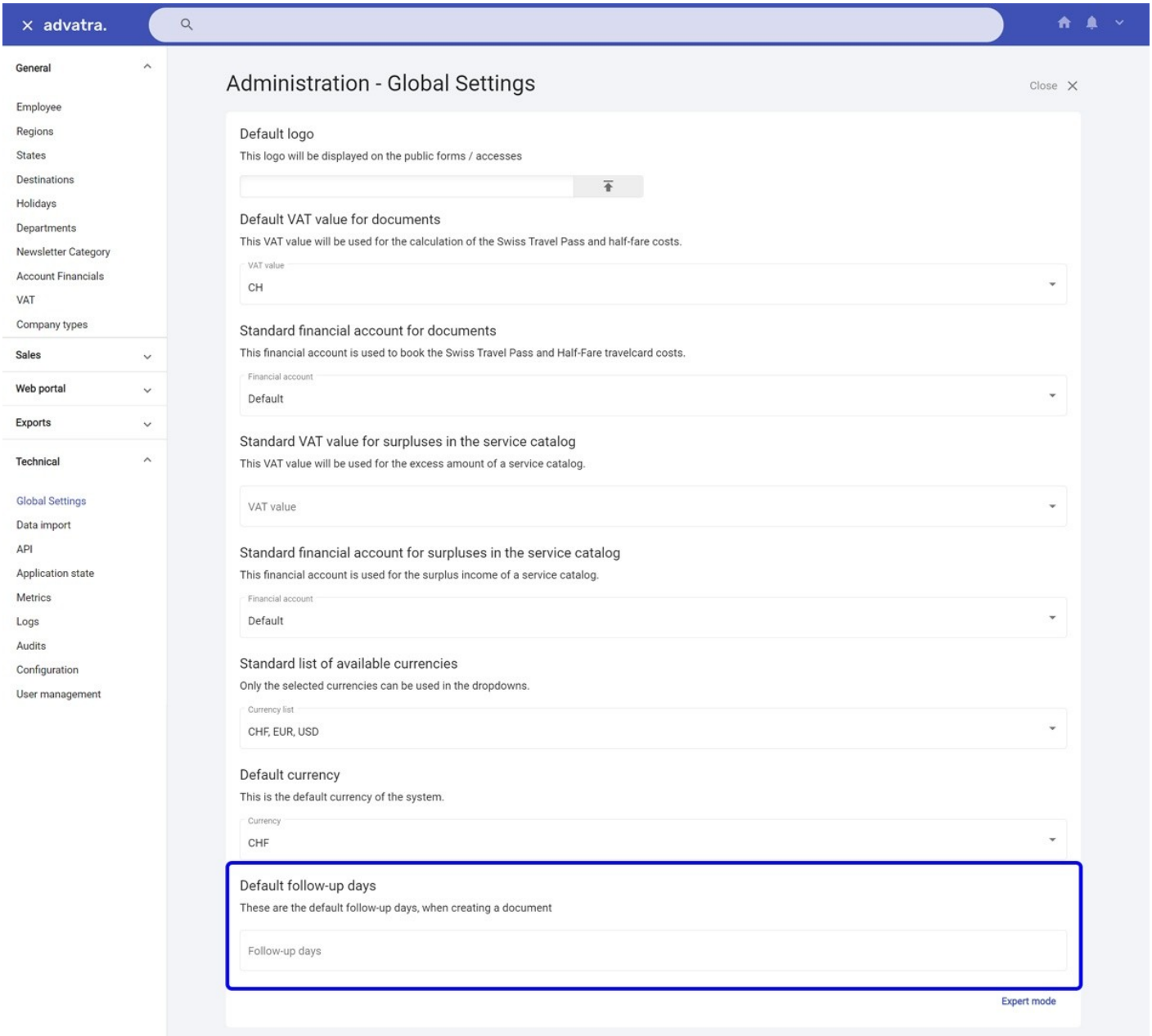
Employee
Which employee is responsible for designing and managing the trip and the dossier in general?

Responsible employee operations
In large companies, the administrative work is distinguished from the work of the travel designer (assembles the trip).

> The employee and the responsible employee can also be the same!

Set automatic follow-up

Menu: Administration ? Administration ? Technical ? Global Settings


advatra.
General
Employee
Regions
States
Destinations
Holidays
Departments
Newsletter Category
Account Financials
VAT
Company types
Sales
Web portal
Exports
Technical
Global Settings
Data import
API
Application state
Metrics
Logs
Audits
Configuration
User management
Administration - Global Settings
Close
Default logo
This logo will be displayed on the public forms / accesses
Default VAT value for documents
This VAT value will be used for the calculation of the Swiss Travel Pass and half-fare costs.
VAT value
CH
Standard financial account for documents
This financial account is used to book the Swiss Travel Pass and Half-Fare travelcard costs.
Financial account
Default
Standard VAT value for surpluses in the service catalog
This VAT value will be used for the excess amount of a service catalog.
VAT value
Standard financial account for surpluses in the service catalog
This financial account is used for the surplus income of a service catalog.
Financial account
Default
Standard list of available currencies
Only the selected currencies can be used in the dropdowns.
Currency list
CHF, EUR, USD
Default currency
This is the default currency of the system.
Currency
CHF
Default follow-up days
These are the default follow-up days, when creating a document
Follow-up days
Expert mode

GDPR requests

Menu: CRM ? GDPR Requests

What

There is a function to black out all personal data. This is important because the EU carries out spot checks to ensure compliance with the GDPR - General Data Protection Regulation.

Create

Create a new GDPR Request and choose between the two types:

Delete
All data of this contact will be deleted.

> This **can not** be undone!

Excerpt
Only an excerpt of all connected data that is linked to this contact in advatra. You can export this excerpt with the "Print as PDF" function.

Marketing codes and sales activities

Menu: CRM ? Marketing codes and sales activities

What

Marketing codes only relate to sales. A marketing code can be entered for any event, product or service. This can be linked to a sales activity. Contacts are attached to the sales activities.

How are sales activities measured?

1. Add contacts to a company or supplier.
2. Create a marketing code for a specific event. (e.g. Las Vegas trade show)
3. Create a sales activity for each contact and link it to the marketing code. (e.g. 10 customers are at the Las Vegas show, each customer can be linked to a Sales Activity and this in turn can be linked to the Marketing Code).

Suppliers

Menu: CRM ? Suppliers

What

Suppliers are service providers for your products. A product (product template and subproduct) can be assigned to only one supplier, but each supplier can be assigned to an unlimited number of products.

Note: when you create product templates:

- If you create a main product with a supplier, this supplier will automatically be used for the subproduct as well.
- If you create a main product without a supplier, you can assign a separate supplier to each subproduct.
- If you delete a supplier on the main product, the deleted supplier will be added to the subproducts (which are not assigned to a supplier).

Create and edit

Fill in the detail information to create a supplier

First name
If it has an official company name, just leave the first field open and enter the company name in the next field.

Name/Company
If it does not have an official company name, just enter first name in field one and family name in field two. Continue and fill in all mandatory fields. Congratulations, now you created a new supplier.

Type
Customer types can be created under Administration ? Administration ? General ? Company Types

Departments
Departments can be created under Administration ? Administration ? General ? Departments.

Locations
You can create multiple locations for one supplier and manage it here. When you create dossiers (projects) and documents later, they will be subordinated to the locations.

Contacts
Here you create contacts that belong to this supplier.