

# Sales

Everything you need during your daily business!

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# 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 document (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.

The screenshot displays the advatra web interface. At the top, there's a navigation bar with the 'advatra.' logo and a search bar. Below this, the main header shows 'Travel Confirmation D1000001.105' with a warning icon. The sub-header reads 'Swiss Alpes Luxury & Relaxed (2 travelers)'. A date range selector at the top indicates the itinerary spans from Sunday, September 5, 2021, to Thursday, September 9, 2021.

The main content area is divided into several sections:

- Title:** 'Welcome to Interlaken'
- Viktoria-Jungfrau Grand Hotel & Spa:** This section includes a 'Limousine Service from and to the airport' with start and end dates (5.9.2021) and times (13:00 and 16:00). It also has a 'Description' field containing the text: 'First Class Limousine Service Interlaken, in Service for your Convenience. Limousine Service Interlaken to and from International Airport.'
- Prices:** A table showing the cost breakdown:

Name	Type	Price	Person	Total
First Class Limousine Service	Flatrate	EUR 2'500.00	2	EUR 2'750.00
- Product Notes:** A section for additional product details.
- Internal notes:** A section for internal communication.

On the right side, there's a 'More' menu with options like 'Finances', 'To-do's', 'Portal access', 'Generate invoice', 'Copy document', and 'Document - Axus export'. Below this menu is a list of itinerary items with icons and labels, such as 'Viktoria-Jungfrau Grand Hotel & Spa', 'Premium Spa package in Viktoria-Jungfrau Gra...', 'Jungfrau Top of Europe Tour Full Day', and 'Lake Steamer Tour'.

# 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.