Your first trip

Putting together a first trip is not difficult at all. Learn how easy it is!

- Intro
- CRM structure
- Create a company
- Create an offer/itinerary

Intro

Putting together a first trip is not difficult at all. After the following steps, you have already created a customer and a suitable trip for them. Your trip can be sent to any contact via PDF, Word or AXUS.

> It is important that you (or your administrator) have already gone through the **CRM** and the **administration** and filled in the most important information in the system.

https://www.youtube.com/embed/es9TC_BUIuk?wmode=opaque

To create your first offer/itinerary, it is important that you understand the following structure: Company ? Location ? Dossier ? Document.

Therefore, we will guide you through the following steps and explain this structure to you:

1. CRM structure
2. Create a company
3. Create an offer/itinerary

CRM structure

Company ? Location ? Dossier ? Documents

- Each customer is recorded in advatra under CRM ? Companies. In most cases, companies are travel agencies.
- A company can have several locations.
- These locations have employees (travel agents) who look after different dossiers (customer trips).
- All important information about a trip can be summarized in the dossiers.

Look at this example for Brownell Travel and how this company would be structured in advatra:

Company (Brownell Travel Company)

Location 1: Brownell Birmingham, Alabama

Dossier 1: One week through Switzerland for the Kennedy family

Document 1: Offer

Document 2: Confirmation

Document 3: Invoice

Location 2: Brownell Atlanta

Dossier 1: One week through Switzerland for the Floyd family

Document 1: Offer

Create a company

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

Create a company

1. Field one "First Name": If it has an official company name, just leave the first field open and enter the company name in the next field.
2. Field two "Name/Company": If it does not have an official company name, just enter first name in field one and family name in field two

Example:

Company (Brownell Travel Company)

Create a location for the company

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.

Example:

Company (Brownell Travel Company)

Location 1: Brownell Birmingham, Alabama

Create a contact for the company

Here you create contacts that belong to this company. The best thing to do first is to create a travel agent with all the contact details.

Example:

Company (Brownell Travel Company)

Location 1: Brownell Birmingham, Alabama

Contact 1: Emily Smith, Travel agent

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 Travel Agency side.
- **Employee**: Which employee is responsible for designing and managing the trip and the dossier in general?
- **Responsible employee operations**: In large DMCs, the administrative work is distinguished from the work of the travel designer (assembles the trip).

Example:

Company (Brownell Travel Company)

Location 1: Brownell Birmingham, Alabama

Dossier 1: One week through Switzerland for the Kennedy family

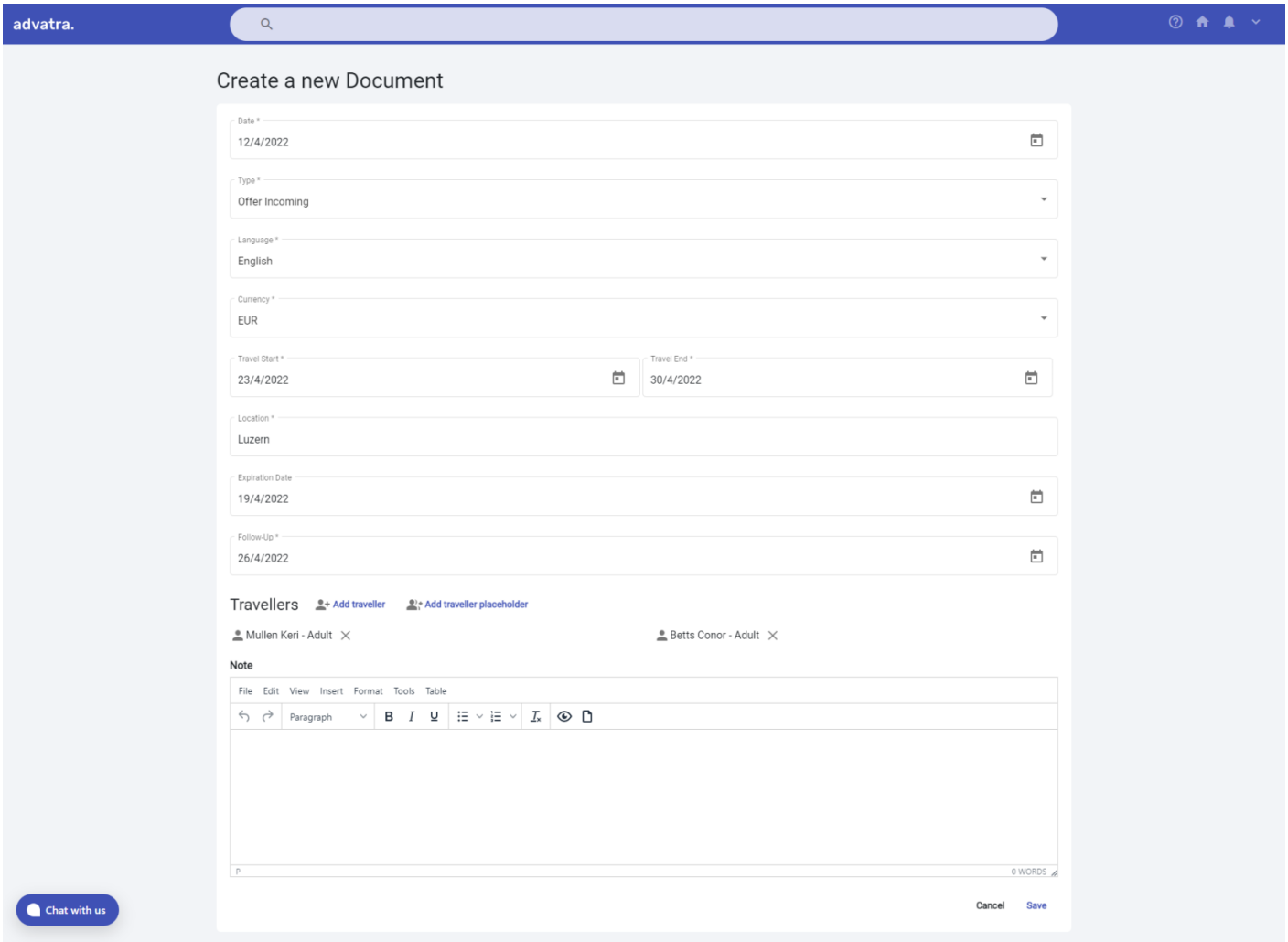
Create an offer/itinerary

After you have created a company with a location and a dossier, you can create your first offer/itinerary in this dossier.

Create an offer

- **Date**
  Creation date of the offer
- **Type**
  Choose your document type
- **Language**
  Choose your document language

  > **Attention**
  > Product notes, vouchers and descriptions are only displayed if they are in the same language as the document.
- **Expiration date**
  Date when the offer expires
- **Follow up**
  On this date, a to-do is automatically created so that the offer is not forgotten. The to-do is assigned to the responsible employee operations. The responsible employee operations can be entered in the dossier entry.
- **Travellers**
  Don't forget to add travellers by clicking on the "Add traveller" button. If you do not know the names of your travellers, just use the function "Add traveller placeholder"



Add a product

You can use the filters in the right panel to search for a specific product, or just to explore your database.

When adding products, you will always be guided through the same dialogue:
Choose a subproduct ? Choose your main services ? Choose your additional services ? Overview

1. **Choose a subroduct**
   If you have stored subpoducts for a product, you can select one of these subproducts here.

2. **Choose your main services**
   Here, you select the main services for the main product as well as for the selected subproduct.

3. **Choose your additional services**
   Here, you select the additional services for the main product as well as for the selected subproduct.

Example: add a hotel

Travel dates: 23/04/2022 - 30/04/2022
Number of travelers: 2 persons

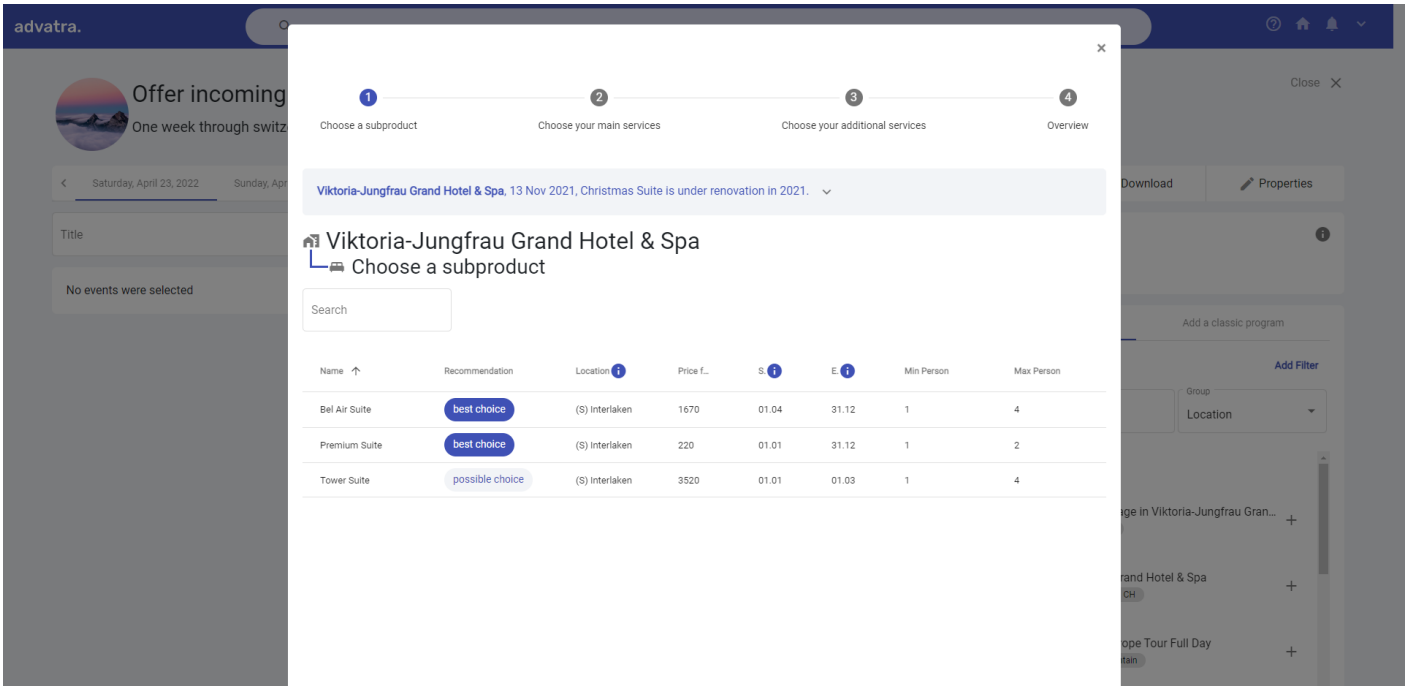
Choose a subproduct

advatra recommends you the best suitable subproduct based on this logic:

Best choice
Start and end dates AND minimum and maximum number of persons matches the travel dates and number of travellers.

Possible choice
Start and end date OR minimum and maximum number of persons matches the travel dates and number of travellers.

Select any of the listed subproducts.

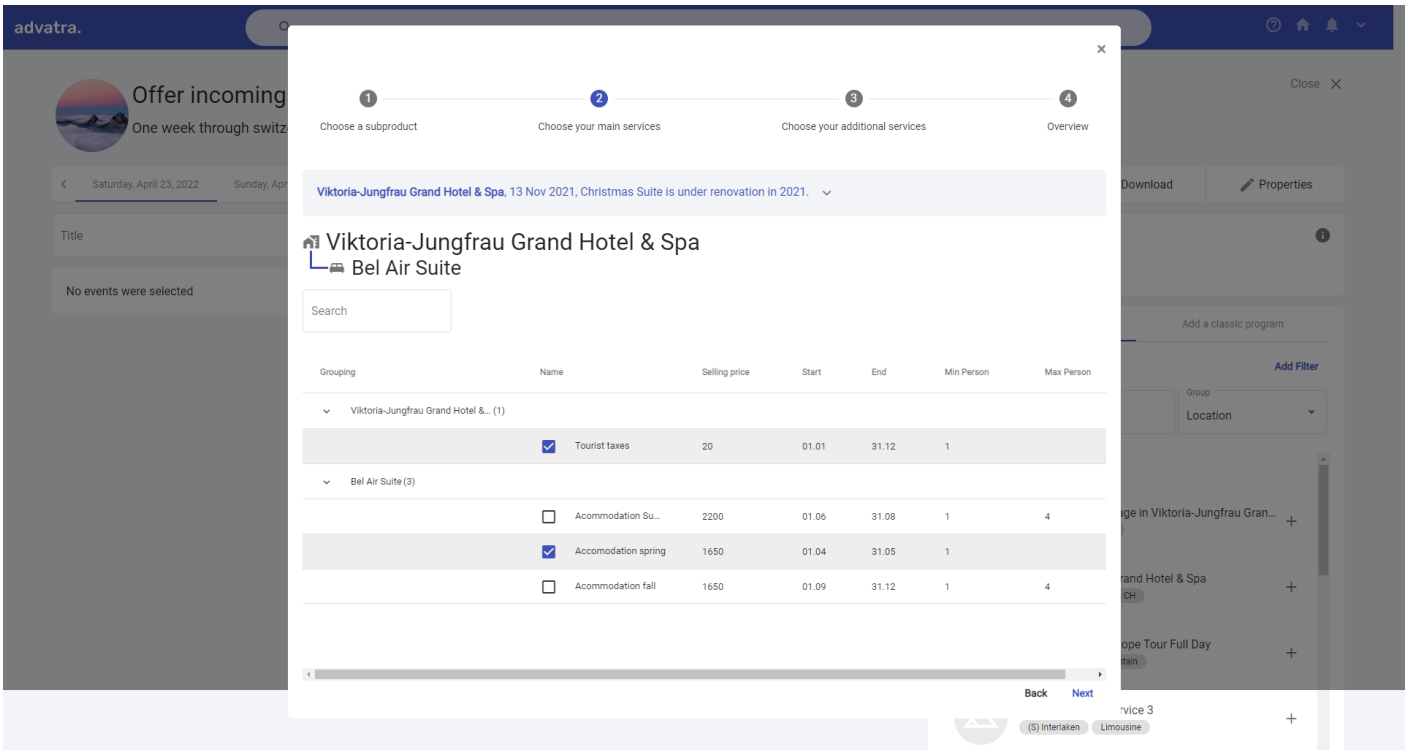


Choose your main services

The services are grouped by the main product and the selected subproduct.

The main services for which the start and end dates as well as the minimum and maximum number of people match are automatically selected.

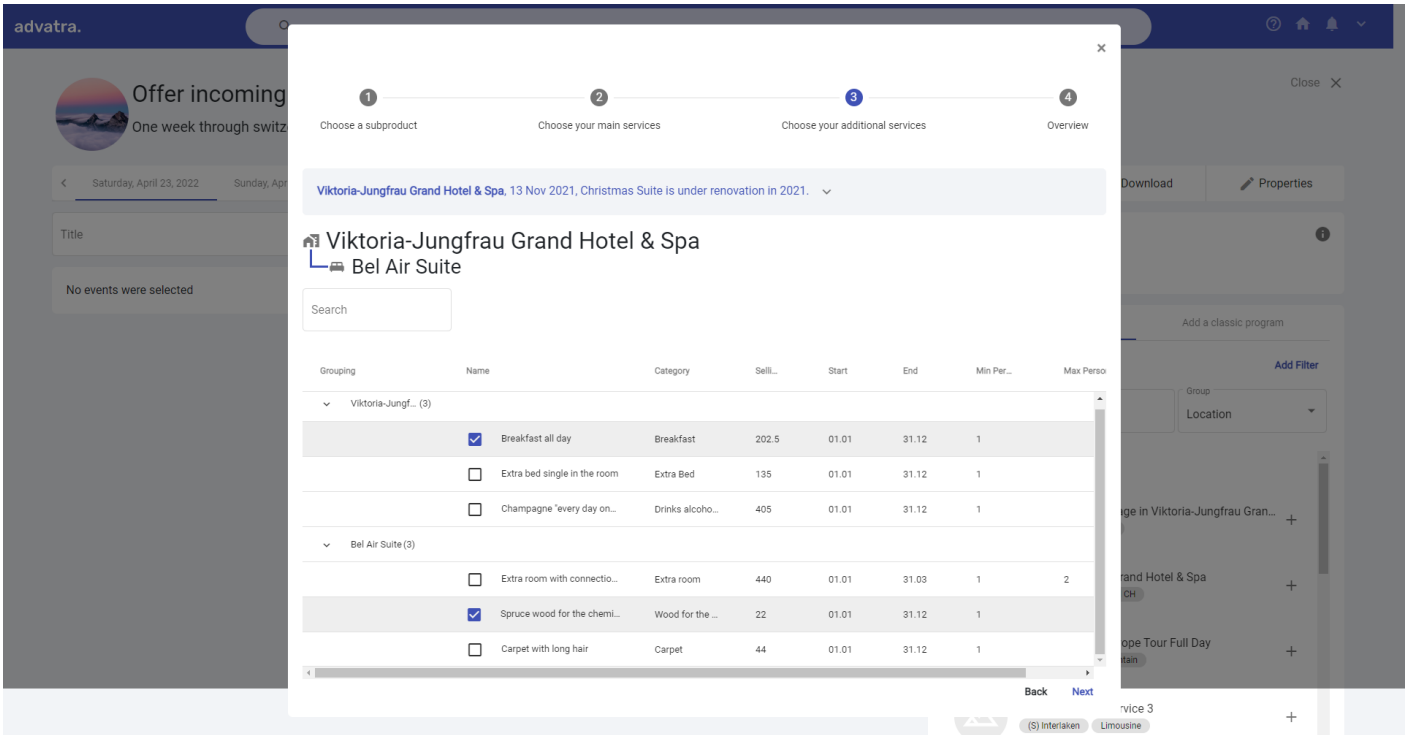
The "price from" that is displayed when you select a subproduct is made up of the main services proposed here:
Product main service: 20€ + subproduct main service: 1650€ = 1670€



Choose your additional services

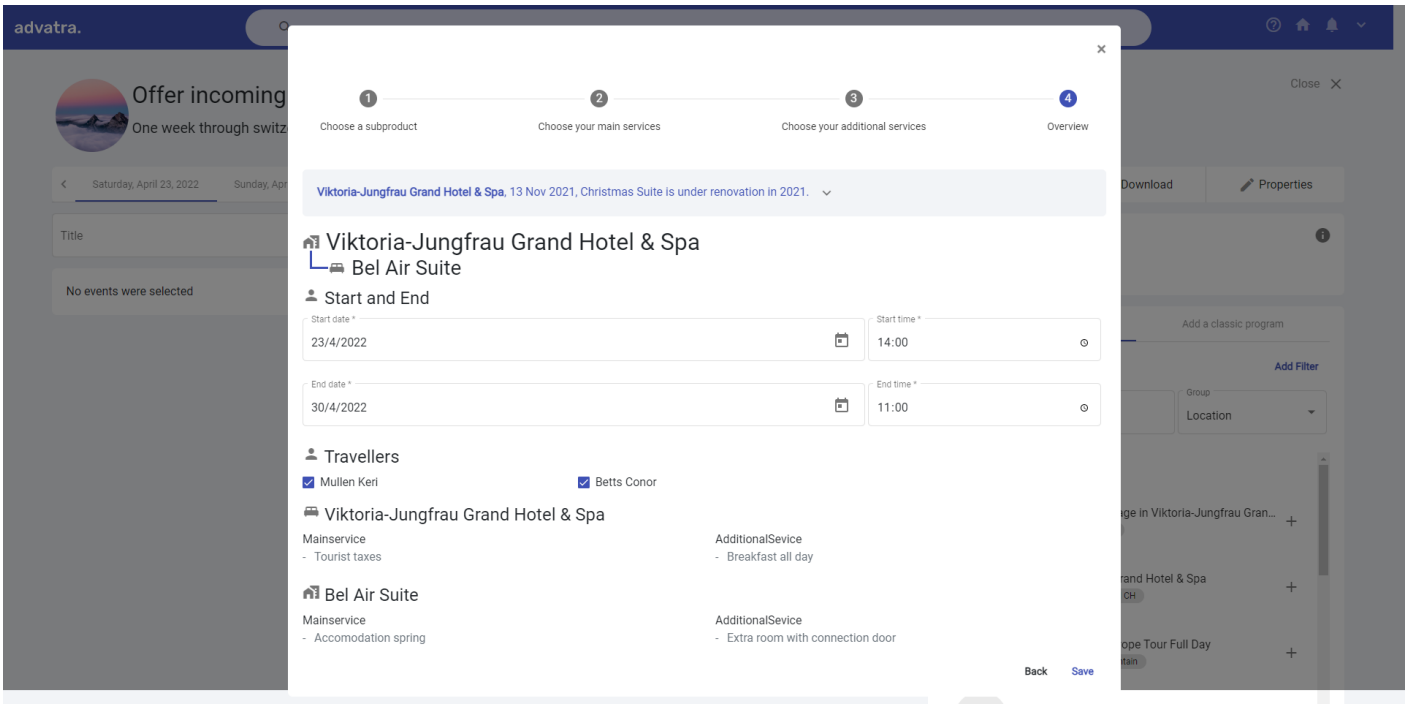
The services are grouped by the main product and the selected subproduct.

Additional services are freely selectable.



Overview

Define the time frame in which the product should take place and select the travellers that will attend.



Create and send itinerary

1. Add as many product templates and classic programs as you need for the trip.
2. After the trip is planned, you can either download it as PDF or Word and send a digital itinerary to the client.
3. Or, the even more advanced way to share your itinerary with your travel agent and client is to export it directly to AXUS.