

# 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"

advatra.

?

Create a new Document

Date \*  
12/4/2022

Type \*  
Offer Incoming

Language \*  
English

Currency \*  
EUR

Travel Start \*  
23/4/2022

Travel End \*  
30/4/2022

Location \*  
Luzern

Expiration Date  
19/4/2022

Follow-Up \*  
26/4/2022

Travellers [Add traveller](#) [Add traveller placeholder](#)

Mullen Keri - Adult × Betts Conor - Adult ×

Note




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Cancel Save

## 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 subproduct

If you have stored subproducts 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.

The screenshot shows the Advatra website interface. A modal window titled 'Choose a subproduct' is open for the 'Viktoria-Jungfrau Grand Hotel & Spa'. The modal has a progress bar at the top with four steps: 1. Choose a subproduct (active), 2. Choose your main services, 3. Choose your additional services, and 4. Overview. Below the progress bar, the hotel name is displayed with a dropdown arrow. A search bar is present. Below the search bar is a table with the following columns: Name, Recommendation, Location, Price f..., S, E, Min Person, and Max Person. The table lists three subproducts: 'Bel Air Suite' (best choice), 'Premium Suite' (best choice), and 'Tower Suite' (possible choice). The background shows a sidebar with 'Offer incoming' and a main area with 'No events were selected'.

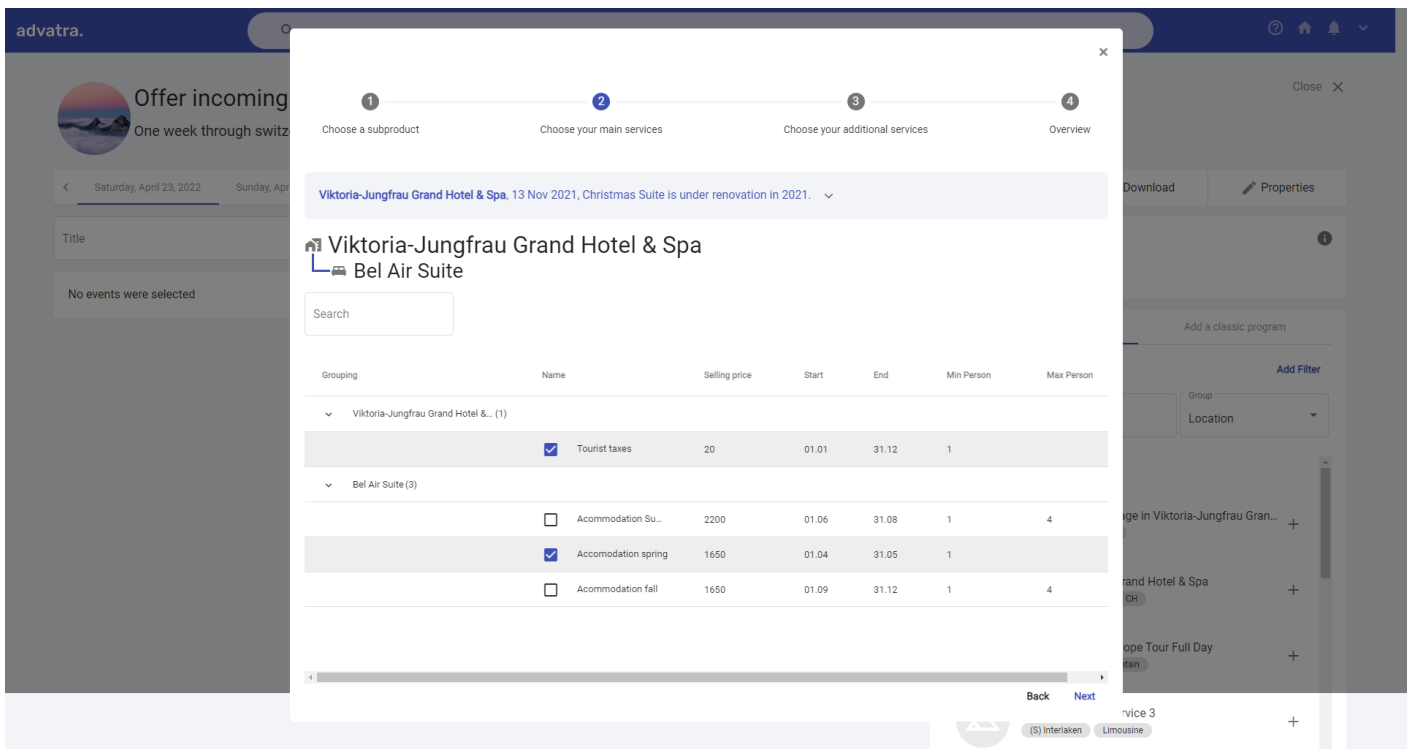
Name	Recommendation	Location	Price f...	S	E	Min Person	Max Person
Bel Air Suite	best choice	(S) Interlaken	1670	01.04	31.12	1	4
Premium Suite	best choice	(S) Interlaken	220	01.01	31.12	1	2
Tower Suite	possible choice	(S) Interlaken	3520	01.01	01.03	1	4

## 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.

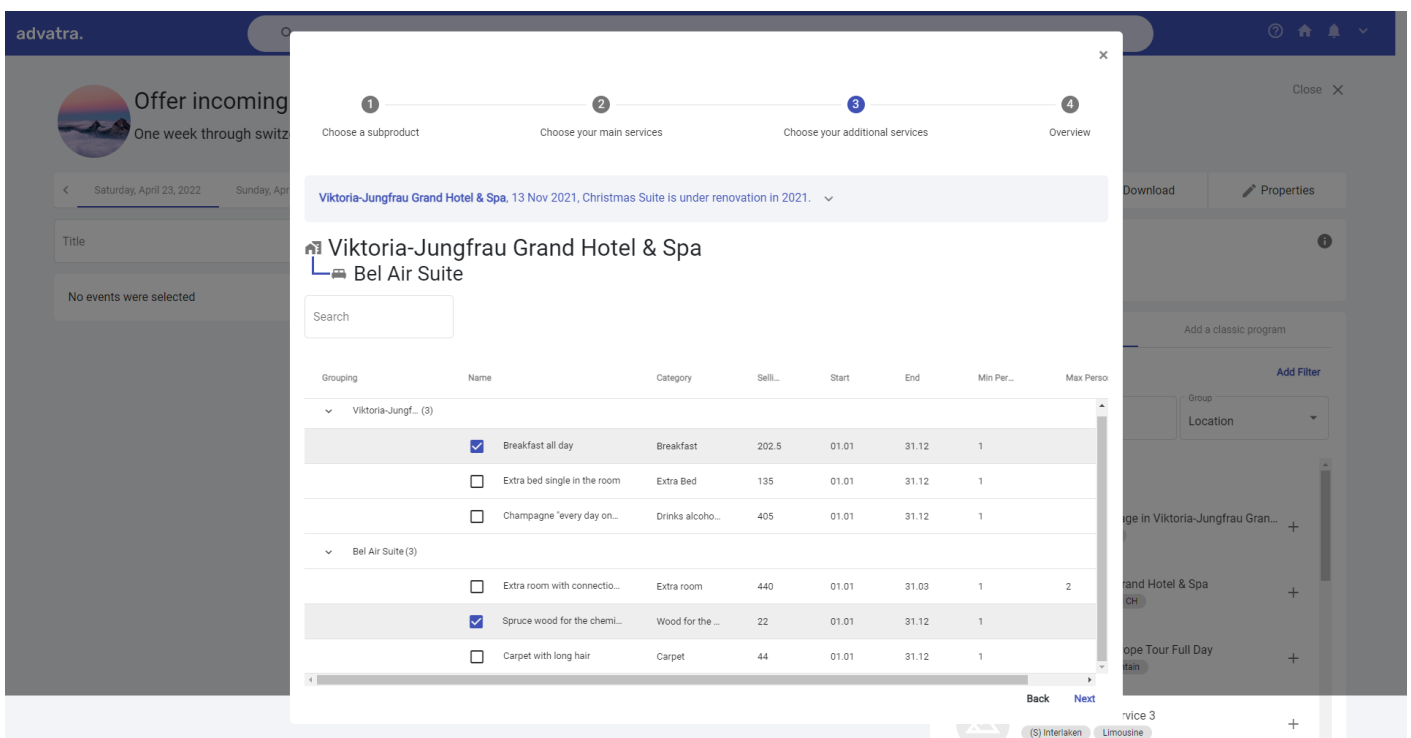
The "price from" that is displayed when you select a subproduct is made up of the main services proposed here:  
Product main service: 20€ + subproduct main service: 1650€ = 1670€



## 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.

The screenshot shows the 'Overview' step (4) of a 4-step wizard in the Advatra system. The wizard steps are: 1. Choose a subproduct, 2. Choose your main services, 3. Choose your additional services, and 4. Overview. The current selection is 'Viktoria-Jungfrau Grand Hotel & Spa, 13 Nov 2021, Christmas Suite is under renovation in 2021.' Below this, the main service is 'Viktoria-Jungfrau Grand Hotel & Spa' with a sub-service 'Bel Air Suite'. The 'Start and End' section shows a start date of 23/4/2022, end date of 30/4/2022, start time of 14:00, and end time of 11:00. The 'Travellers' section lists two travellers: Mullen Keri and Betts Conor, both checked. Below the travellers, the main service 'Viktoria-Jungfrau Grand Hotel & Spa' is listed with 'Mainservice' (Tourist taxes) and 'AdditionalService' (Breakfast all day). The sub-service 'Bel Air Suite' is listed with 'Mainservice' (Accommodation spring) and 'AdditionalService' (Extra room with connection door). At the bottom right, there are 'Back' and 'Save' buttons. The background shows a sidebar with 'Offer incoming' and a calendar view.

## 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](#).