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