

Opportunities

Description

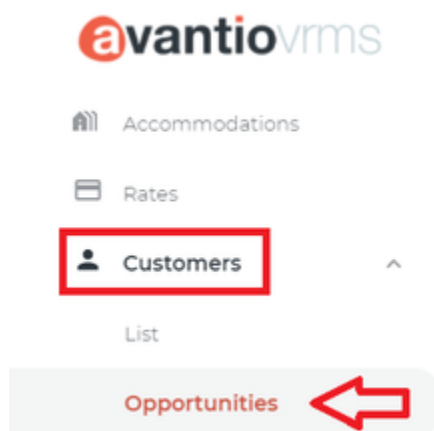
The opportunity module allows you to create proposals and increase direct bookings. Proposals can be created based on the needs of the tourist.

Benefits

The module will allow you to create discounts and send proposals via email. Personalise proposals to the tourists needs.

Configuration

You can find the opportunities module in Customers:



There are two ways to visualise opportunities:

List

You can see all the details of the opportunities created. Click on "actions" to change the status of the proposal.

Opportunities								
FILTERS		NEW		ACTIONS				
SELEC	STAFF/AGENT	OPPORTUNITY NAME	CUSTOMER	CREATION	EXPIRY	PROPOSAL	STATUS	ACTIONS
	Bea	Férias na Espanha	Filip dubrovac	1 hour ago	25/11/2019	500,00 € - 2.000,00 €	Sent	
	Maria Angélica	Férias na Espanha	Filomena Magalhães	Friday	19/04/2020	500,00 € - 8.500,00 €	Created	
	Bea	Weekend Frankfurt	jose vazquez	Thursday	21/11/2019	500,00 € - 2.000,00 €	Created	
	Bea	Vacanze in Spagna	Ambra Meloni	Thursday	21/11/2019	500,00 € - 4.700,00 €	Sent	
	Maria Angélica	Férias	Angel Di Maria	Thursday	21/11/2019	500,00 € - 4.500,00 €	Created	
	Maria Angélica	Férias na Espanha	Filomena Magalhães	Thursday	21/11/2019	500,00 € - 2.000,00 €	Pending	
	Maria Angélica	Férias na Espanha	Filomena Magalhães	Thursday	21/11/2019	500,00 € - 2.000,00 €	Created	

Kanban

Opportunities

FILTERS ?

NEW

Active opportunities
Showing all

In preparation (19)

Férias na Espanha Friday

Filomena Magalhães

500,00 € - 8.500,00 €

Weekend Frankfurt Thursday

jose vazquez

500,00 € - 2.000,00 €

Férias Thursday

Angel Di Maria

500,00 € - 4.500,00 €

Férias na Espanha Thursday

Filomena Magalhães

500,00 € - 2.000,00 €

Férias na Espanha Thursday

Filomena Magalhães

500,00 € - 2.000,00 €

Awaiting response (25)

Férias na Espanha 1 hour ago

Filip dubrovac

500,00 € - 2.000,00 €

Vacanze in Spagn... Thursday

Ambra Meloni

500,00 € - 4.700,00 €

Fallo Auditoria Wednesday

Miguel Miguel

500,00 € - 2.000,00 €

Férias espanhã 20/10/2019

maraia marais

500,00 € - 2.000,00 €

Escapada fin de... 25/10/2019

Juan José Millan

500,00 € - 2.000,00 €

Expired (10)

Férias na Espanha Thursday

Filomena Magalhães

500,00 € - 2.000,00 €

Martin se va de ... 21/10/2019

Miguel Samión

500,00 € - 2.000,00 €

Test oportunidad 21/10/2019

Antonio Diaz-Portales

500,00 € - 2.000,00 €

Vacaciones Invi... 18/10/2019

Angel Di Maria

500,00 € - 4.500,00 €

Partnership Ibiza 15/10/2019

Miguel Miguel

500,00 € - 2.000,00 €

Archived opportunities
Showing the last 7 days

Rejected (6)

Fallas Valencia 23/10/2019

Elena Cubells

500,00 € - 2.000,00 €

prueba test Paco 18/10/2019

paco prueba pascual martin

500,00 € - 7.000,00 €

paco 18/10/2019

paco prueba pascual martin

500,00 € - 2.000,00 €

Vacanze prima... 16/10/2019

Maria Raventos

500,00 € - 4.500,00 €

Andy 11/10/2019

Andy Osborne

500,00 € - 4.750,00 €

Accepted (9)

TEst Avantio Tuesday

jose vazquez

500,00 € - 2.000,00 €

segunda prueb... 24/10/2019

Paco Pascual Martin

500,00 € - 2.000,00 €

Miguel se va de... 21/10/2019

Miguel Samión

3.500,00 € - 4.500,00 €

Proposta fine s... 17/10/2019

Raul Soto

500,00 € - 2.700,00 €

Vacaciones en ... 17/10/2019

Maribel Blanco Vargas

500,00 € - 2.000,00 €

To create an opportunity click on the button "new".

Fill in the information in the fields:


- Opportunities


CANCEL


SAVE


Vacation Summer


Client info

 Isabel Vargas

 -

 test@test.com

 English

 Normal

Client comments

Summer vacation

Internal Notes

Vip

1. CREATE

2. SEARCH

3. PROPOSE


4. SEND

Opportunity name? *

Vacation Summer

Date created *

12/11/2019




Who is this for? *

Isabel Vargas

NEW

Expires *

26/11/2019



Staff/Agent Assigned?

Isabel Vargas

What is the budget?

500 €

2000 €

CANCEL

NEXT

Customer: the system automatically detects if the customer already exists in the system, in case it is a new customer, click on “new” to create a new customer.

The screenshot shows a 'New customer' modal form overlaid on the 'Opportunities' page. The modal has a title 'New customer' and a close button (X). It contains several input fields: 'Name' (with a placeholder 'Write the customer name...'), 'Surname' (with a placeholder 'Last name 1'), 'Second surname' (with a placeholder 'Last name 2'), 'E-mail' (with a placeholder 'Example@Example.com'), 'Phone' (with a placeholder '000 000 000'), 'Customer category' (a dropdown menu with 'Normal' selected), and 'Language' (a dropdown menu with 'English' selected). A red label 'Obligatory fields*' is positioned above the 'Name' field. At the bottom of the modal are two buttons: 'CREATE' (red) and 'CANCEL' (white with a red border). The background shows the 'Opportunities' page with a 'Vacation Summer' header, a progress bar with steps '1. CREATE', '2. SEARCH', '3. PROPOSE', and '4. SEND', and a sidebar with 'Client info', 'Client comments', and 'Internal Notes'.

Make sure the email address of the customer is the correct one, in case it is not, make sure to change it because the proposal will be send by email.

- Associate the agent / the VRMS user who created this opportunity.
- Budget
- Any comments of the customer can be added in the field “clients comments”.
- Fill in any internal communication for you and your colleagues in “internal notes”.

2. Search

In the second step, you can search for opportunities according to what the tourist requested.

The screenshot shows the 'Search' step of the 'Opportunities' process. The progress bar at the top indicates '1. CREATE', '2. SEARCH' (active), '3. PROPOSE', and '4. SEND'. The main form area contains several search criteria: 'Location?' (a dropdown menu with 'Spain' selected), 'What dates?' (two date pickers with dates '12/15/2019' and '12/15/2019'), 'How many people?' (a dropdown menu with '2' selected), 'Property type' (a dropdown menu with '3 selected'), and 'How many bedrooms?' (a dropdown menu with '1' selected). There is also a text input field for 'Add additional amenities?'. At the bottom are two buttons: 'RETURN' (white) and 'NEXT' (teal). The sidebar on the left is the same as in the previous screenshot.

- Fill in the destination - country, region or city.
- Check-in and check-out dates.
- The amount of people travelling.

In additional features, you can indicate what features the accommodation should have, for example a Swimming pool or Playground.

Compatibility of additional features

Only the following features are currently compatible:

'SWIMMING POOL'
'TV'
'SATELLITE'
'AIR CONDITIONER'
'HEATING'
'GARAGE'
'PARKING'
'ADPT. DISABLED '
'ALLOW ANIMALS'
'WASHING MACHINE'
'DISHWASHER'
'MICROWAVE'
'TERRACE'
'BARBECUE'
'INTERNET'
'FENCED PLOT'
'ACCESS WITHOUT STAIRS'
'CHIMNEY'

3. Propose

In the third step, the available accommodations will appear according to the search.

When clicking on the name of the accommodation a new window opens where you can review the characteristics.

Click on the accommodation you want to include in the proposal.

Opportunities

CANCEL SAVE

Vacation Summer

Client info

Isabel Vargas

-

test@test.com

English

Normal

Client comments

Summer vacation

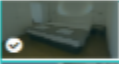
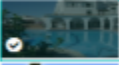

Internal Notes

Vip

1. CREATE 2. SEARCH 3. PROPOSE 4. SEND

Location: Spain Dates: 12/11/2019 19/11/2019 Bedrooms: 1 Adults: 2

6 results 2 selected

	Property name	Price per night	Subtotal	Discount	Total
	La Rosa	167,57 €	1.173,00 €	-2,2%	1.199,25 €
	Marisol	147,57 €	1.033,00 €	-2,5%	1.059,25 €
	Palm beach 2	160,71 €	1.188,00 €	-2,2%	1.214,25 €

Page 1 of 2 (3 of 8) < 1 2 >

RETURN NEXT

4. Send

In the fourth step, you can add a discount and personalise the message.

Opportunities
[CANCEL] [SAVE]

Vacation Summer

Client info
Isabel Vargas
-
test@test.com
English
Normal

Client comments
Summer vacation

Internal Notes
Vip

1. CREATE * 2. SEARCH * 3. PROPOSE * 4. **SEND**

Location	Dates	Bedrooms	Adults
Spain	12/11/2019 18/11/2019	1	2

2 properties ready to be sent

	La Rosa	171,32 €/noche	0.00%	1199.25€
	Marisol	151,32 €/noche	0.00%	1059.25€

[RETURN] [SEND]

Click on "send" and the email (template) with the proposal will appear on your screen.

It is possible to personalise the message on the top of the template, the rest of the template can not be modified.

[SEND] [CANCEL]

Send to:
Cc: Bcc:
☒ Customer: Isabel Vargas Rojas (test@test.com)
☐ Others: (Separate by commas for multiples emails addresses)

From: notifications@avantio.com [Edit] [Add email] Firm: None

Template: Oportunidad de negocio Language: English

Subject: Accommodations proposal

File Edit Insert View Format Table Tools

Hi!
(Write a message)

Search

Once the proposal is sent, make sure to follow up with the customer regarding the proposal (outside the VRMS) and change the status of the proposal manually in the module.

If the tourist accepts the proposal, click on the "convert" button and directly create the booking.

Proposed accommodations



White beach

65€/night

-15%

251,25€

Notes from Agent Beatriz M.:

This accommodation has a swimming pool, and is close to the beach. It can be adjusted to what you are looking for.

CONVERT

By clicking the CONVERT button, a new booking page will open, but until you click save and then edit again, you will not be able to change the amounts nor add extras.

The is the normal function of the system since it is supposed that we want to convert the opportunity the same way in which we offered it to the guest.

Change the status of the proposal.

Once the proposal is sent, the status will automatically change to “waiting for a response”. From this moment on, the status of the opportunities will have to be updated manually, either from the Kanban by moving to the corresponding column, or from the list by editing the opportunity.

Opportunities

FILTERS NEW ACTIONS

Change status

SELEC	STAFF/AGEN	OPPORTUNITY NAME	CUSTOMER	CREATION	EXPIRY	PROPOSAL	STATUS	ACTIONS
	Booking Department	Vac Fami	Oreste Fischetti	16/05/2022	30/05/2022	€0.00 - €1,500.00	*	

Page 1 of 1 (1 of 1)

Opportunities

FILTERS NEW

Active opportunities Showing all

In preparation (1) Awaiting response (0) Expired (0)

Archived opportunities Showing the last 7 days

Rejected (0) Accepted (0)

Vac Fami 16/05/2022
Oreste Fischetti
€0.00 - €1,500.00

Opportunities that have expired will be highlighted in red.

The tourist receives the email.

YourHolidays


¡Hi Bea!

As we spoke on the phone, here is the proposal for your trip. Take a look at the accommodations attached and if it doesn't suit your needs, I'll send you another proposal. We're still in touch!

SEARCH


Destination	Dates	Bedrooms	Occupants	Characteristics
jafn	22 dic. - 30 dic.	1	2	Pets, jacuzzi, chef

PROPOSAL DETAIL



White beach 65€/night -15% **251,25€**

Notes from Agent Beatriz M.:
This accommodation has a swimming pool, and is close to the beach. It can be adjusted to what you are looking for.



Apart. 15 46€/night -10% **207€**

Notes from Agent Beatriz M.:
This accommodation is cheaper quality-price. It does not have a swimming pool but it has one more room. If you are interested in this type of apartment.

Sincerely,
Your Holidays

The tourist will receive an email with the proposed accommodations. By clicking on any of the accommodations in the email, it will take them to your website and property page.

To confirm the booking the tourist should contact the agency by phone or by email.