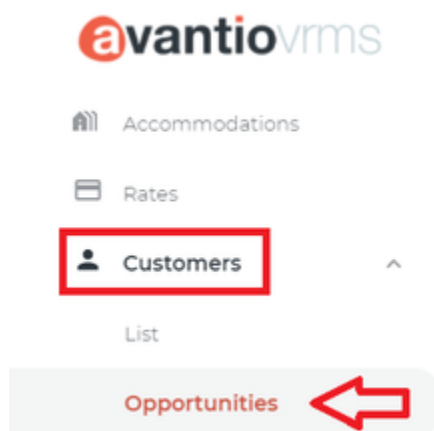# Opportunities

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.

Kanban

See the proposals in a more interactive way. Manually change the status of the proposals by dragging and dropping the tab to the corresponding status column.

Create an opportunity

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

1. Create

Fill in the information in the fields:

- Name of the opportunity.
- Date of creation - today or any date in the past.
- Expiration date - until what date is the proposal valid.

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.

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.

- 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'

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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.
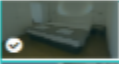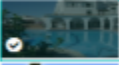
4. Send

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

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.

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

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	●	🗑

FILTERS NEW ACTIONS ▲
Change status

Page 1 of 1 (1 of 1)

Opportunities

FILTERS NEW

Active opportunities			Showing all		Archived opportunities		Showing the last 7 days

In preparation (1) | **Awaiting response (0)** | **Expired (0)** | | **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.

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.