

TRAVIYO

USER MANUAL



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1. Introduction

1.1 Background

This user manual will help you to use the application and give you complete instruction so that you can get to know all aspects of the application easily and quickly. You'll find detailed screenshots, explanations and instructions on how to manage the complete application.

After you've tried it a couple of times, you'll get more familiar with TraviYo and find it easy to use and you may not need this manual any longer, but it is here as a reference.

1.2 About TRAVIYO

TraviYo is travel automation software and end to end ERP for travel agency, Majorly TraviYo have features like Website Development, Travel CRM, Quotation Builder, Supplier Management, Payment Scheduler, Invoicing, MIS reports and Business Promotional activities.

2. TraviYo Operations

2.1 Accessing your website and Backend

You can access your website from:

- 1) What your customer sees, also known as "The Front End":

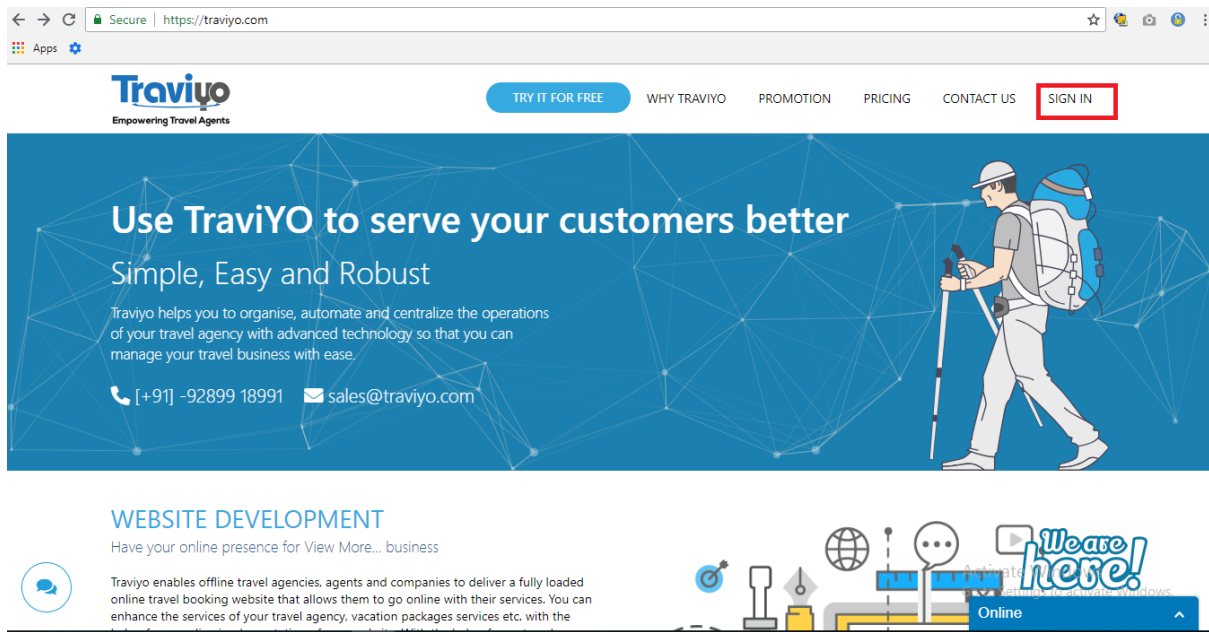
<http://website.traviyo.com/> or <http://yourwebsitename.com>



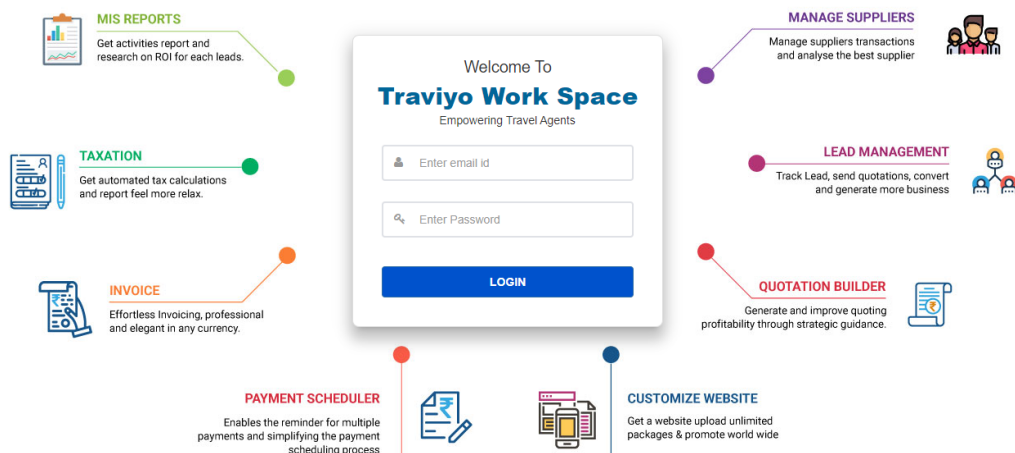
2) The backend panel, where you can manage your website, CRM and other required tools.

<https://traviyo.com>

This will be the TraviYO main website you will find a login button on the right top corner of the website once you click on this login button login button it's redirecting you to the login page where you will submit your credentials and hit the login button to proceed and access the backend panel.

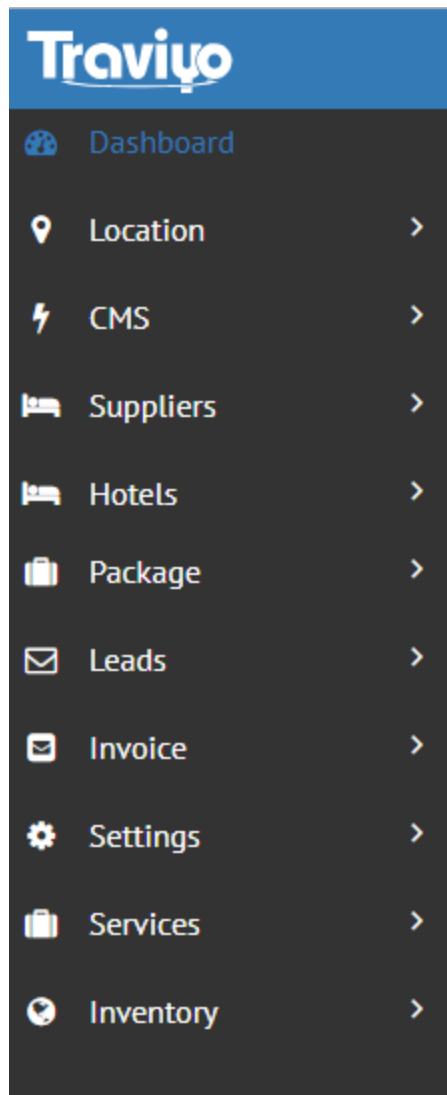


Below is your login screen entering your credentials provided by TraviYO and click on login button, it will redirect you to the dashboard work space area.

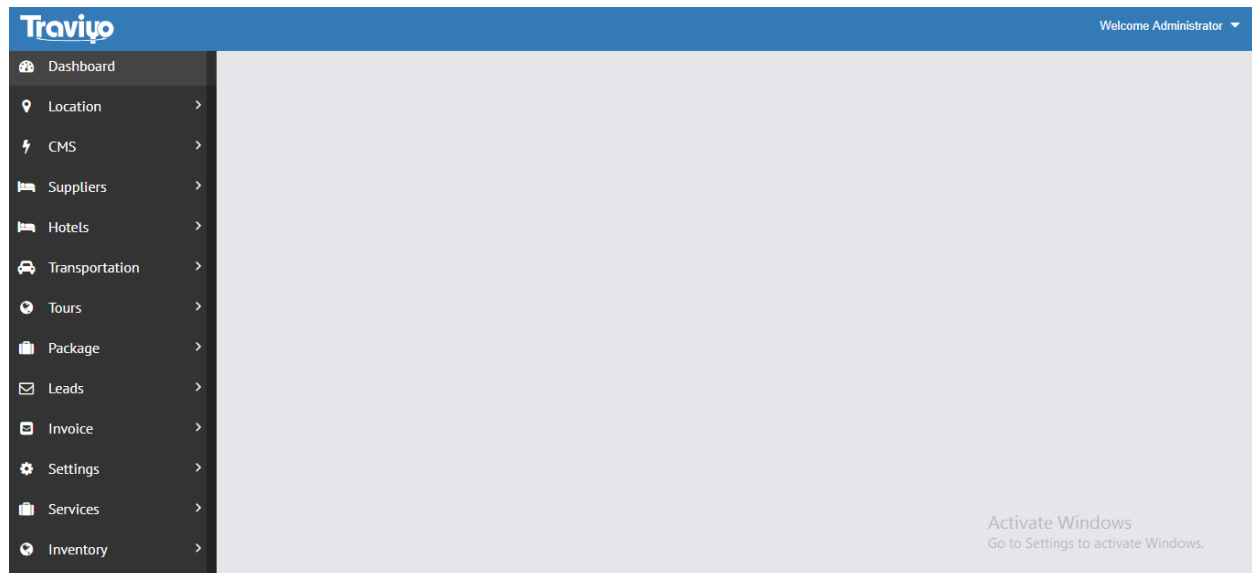


2.2 TraviYo Work Space Areas

Once you have logged in, you will see a list of administrative items on the left side of the screen. You can use these to move around the admin section.



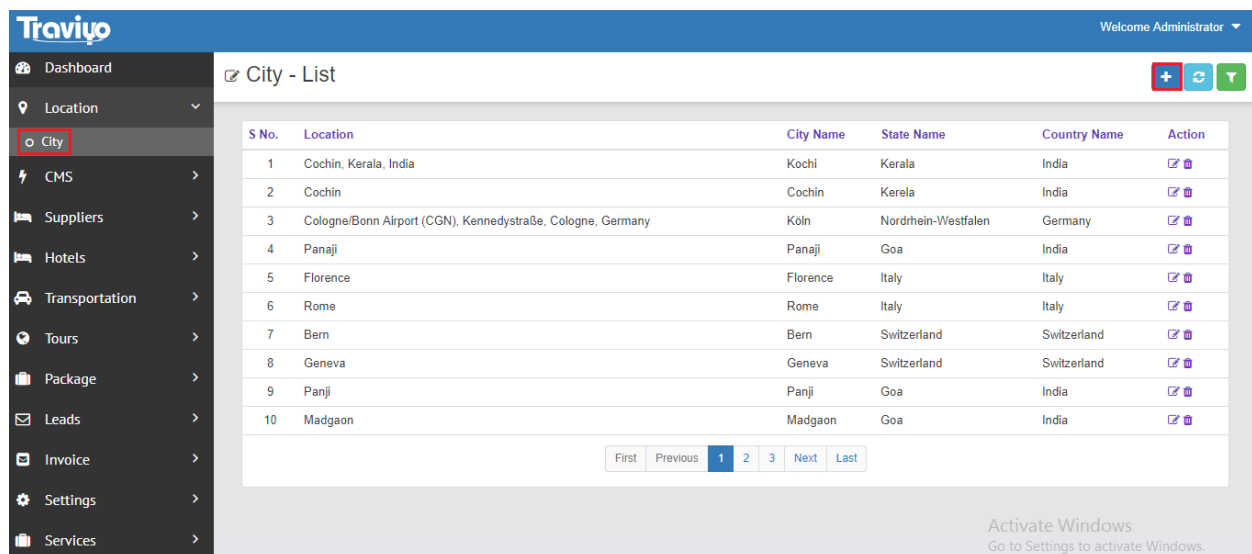
Below is your default dashboard screen which is the start page of your work space after successfully login application will land to this area.



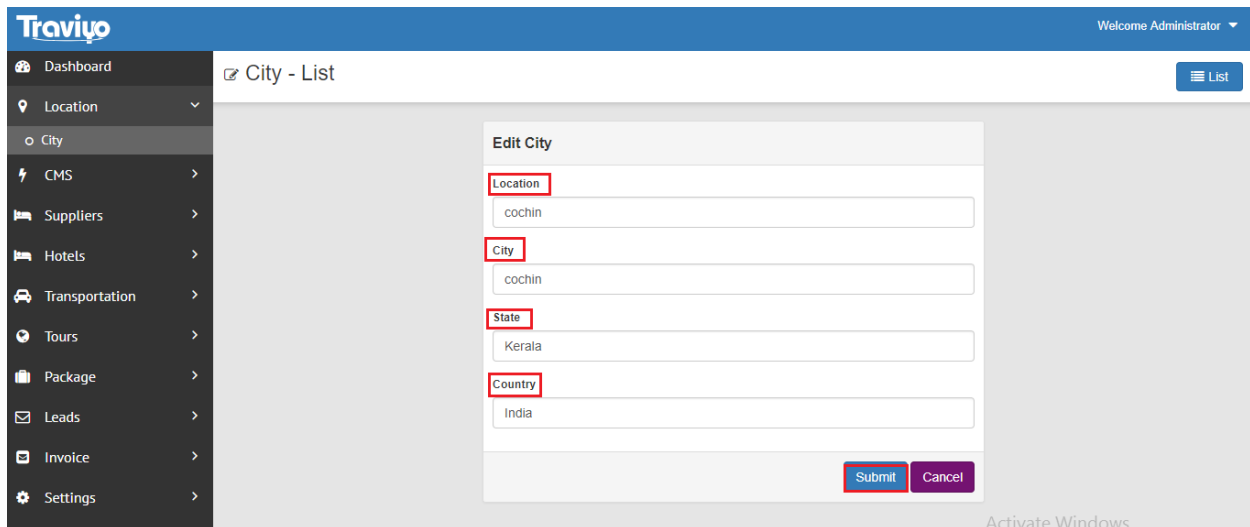
2.2.1. Manage Location

Navigate to **Location=>City** menu option to add cities for what you want to create your packages. For adding cities you will click add button which is highlighted on the below picture. After adding a city it will add to the city list which is appear in below screen.

2.2.1.1. City



Once you will click on add button one form will open with option to add city information, you can add location, city, county and state for what you want to create your packages. But Location is for the conformation of the city. After filling all of the fields click on submit button.

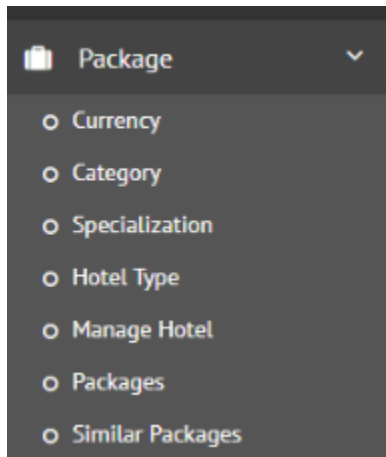


The screenshot displays the Traviyo admin interface. On the left is a dark sidebar with a menu including Dashboard, Location, City, CMS, Suppliers, Hotels, Transportation, Tours, Package, Leads, Invoice, and Settings. The main header is blue with the Traviyo logo and a 'Welcome Administrator' dropdown. The page title is 'City - List'. A 'List' button is in the top right. The central area features an 'Edit City' form with four input fields: 'Location' (containing 'cochin'), 'City' (containing 'cochin'), 'State' (containing 'Kerala'), and 'Country' (containing 'India'). Each field label is highlighted with a red box. At the bottom right of the form are 'Submit' and 'Cancel' buttons. An 'Activate Windows' watermark is visible in the bottom right corner of the page.

2.2.2 Manage Packages for your website and quotation

There are few set up instruction you need to follow before adding any new packages to your website, to manage those basic criteria for packages which is used for each packages we set up them in to a master setting so that you can adding them at once and use every time while you are adding any packages to your system as I defined all those master setting below.

Now click on package module after clicking on package module, sub module will display on the screen. For creating the package there are multiple sub module such as currency, category, specialization, hotel type, manage type, packages and similar packages.

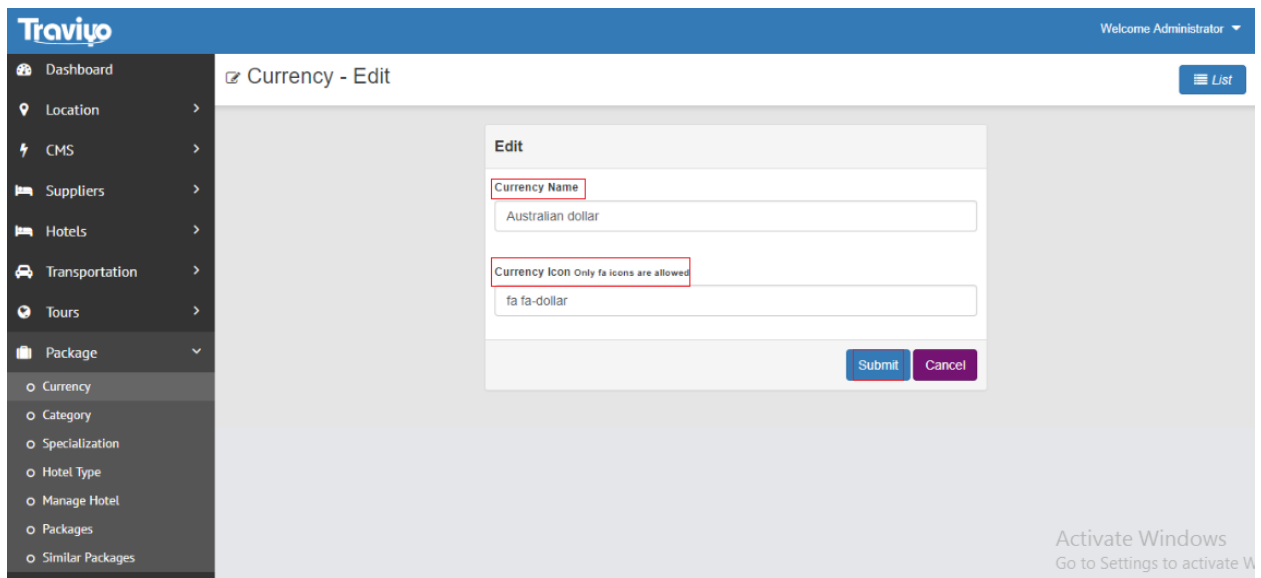


2.2.2.1 Currency

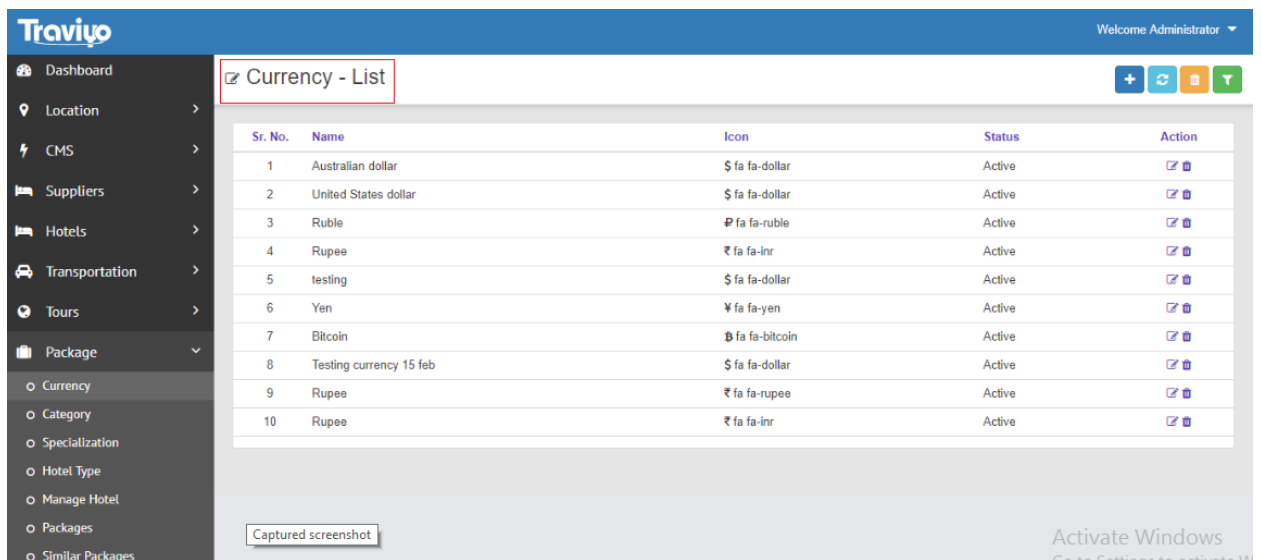
For creating package first click on currency then you will see add option on top right corner as highlighted on the picture below.

Sr. No.	Name	Icon	Status	Action
1	Australian dollar	\$ fa fa-dollar	Active	Edit Delete
2	United States dollar	\$ fa fa-dollar	Active	Edit Delete
3	Ruble	₽ fa fa-ruble	Active	Edit Delete
4	Ruppee	₹ fa fa-inr	Active	Edit Delete
5	testing	\$ fa fa-dollar	Active	Edit Delete
6	Yen	¥ fa fa-yen	Active	Edit Delete
7	Bitcoin	฿ fa fa-bitcoin	Active	Edit Delete
8	Testing currency 15 feb	\$ fa fa-dollar	Active	Edit Delete
9	Ruppee	₹ fa fa-rupee	Active	Edit Delete
10	Ruppee	₹ fa fa-inr	Active	Edit Delete

After clicking on add you can add currency name and currency icon as shown on the picture below. After adding currency name and icon click on submit.



After click on submit currency list will get created as shown on the picture below. The added currency name and icon will display on the screen in currency list.



After adding currency you will need to add second sub module which is category, click on category option you will see the add option on top right corner click on that option. Once you click on add option you will see few field as show on the picture below.

2.2.2.2 Category

Traviyo

Welcome Administrator

Category - Edit

Edit

Category Name

Cochin tour

Header

Cochin tour

URL

Cochin tour

Meta Keyword

Cochin tour

Title

Cochin tour

Og Tag

Cochin tour

Meta Description

This is the best package at the reasonable price.

Choose File

Choose File

Upload Image File

Image (max. 800x, 800px)

Image

Description

File Edit View Format

It is a long established fact that a reader will be distracted by the readable content of a page when looking at its layout. The point of using Lorem Ipsum is that it has a more-or-less normal distribution of letters, as opposed to using 'Content here, content here', making it look like readable English. Many desktop

p > span

Is Featured

Submit Cancel

After filling all the fields you will see an checkbox “IS FEATURED”, this checkbox is optional if you want to display the category on the menus of your website, check that checkbox otherwise leave it unchecked and click on submit button.

Traviyo

Welcome Administrator

Description

File Edit View Format

It is a long established fact that a reader will be distracted by the readable content of a page when looking at its layout. The point of using Lorem Ipsum is that it has a more-or-less normal distribution of letters, as opposed to using 'Content here, content here', making it look like readable English. Many desktop

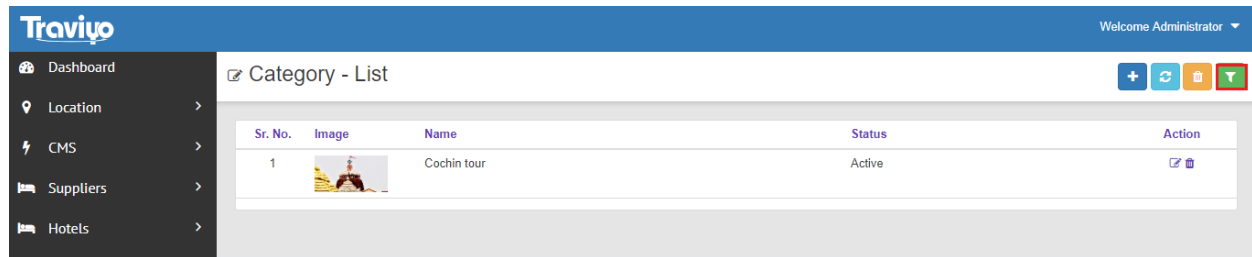
p > span

Is Featured

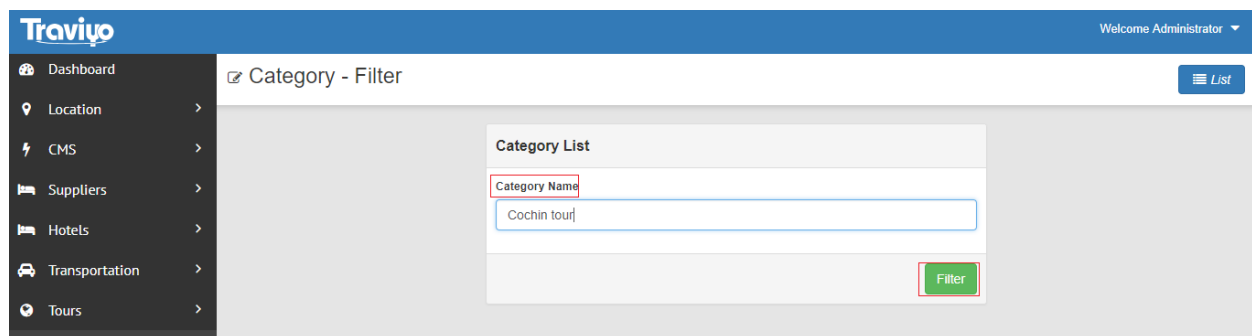
Submit Cancel

Activate Windows

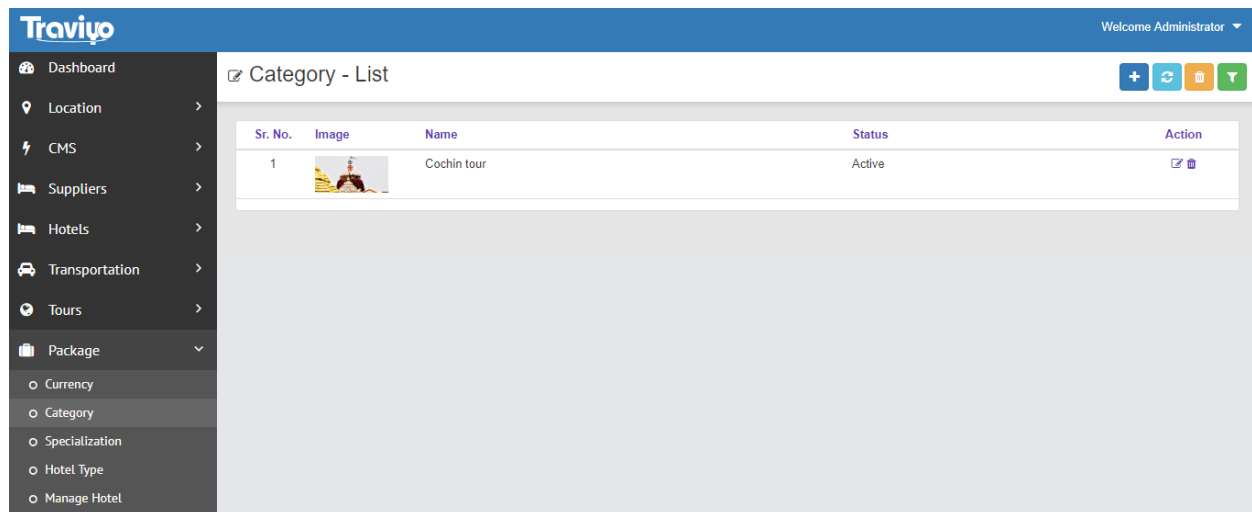
After this if you want to filter any category that you have added click on the top right corner fourth option which is filter option there you can filter your List.



After clicking on filter option below page will open on your screen fill the category name and click on filter.

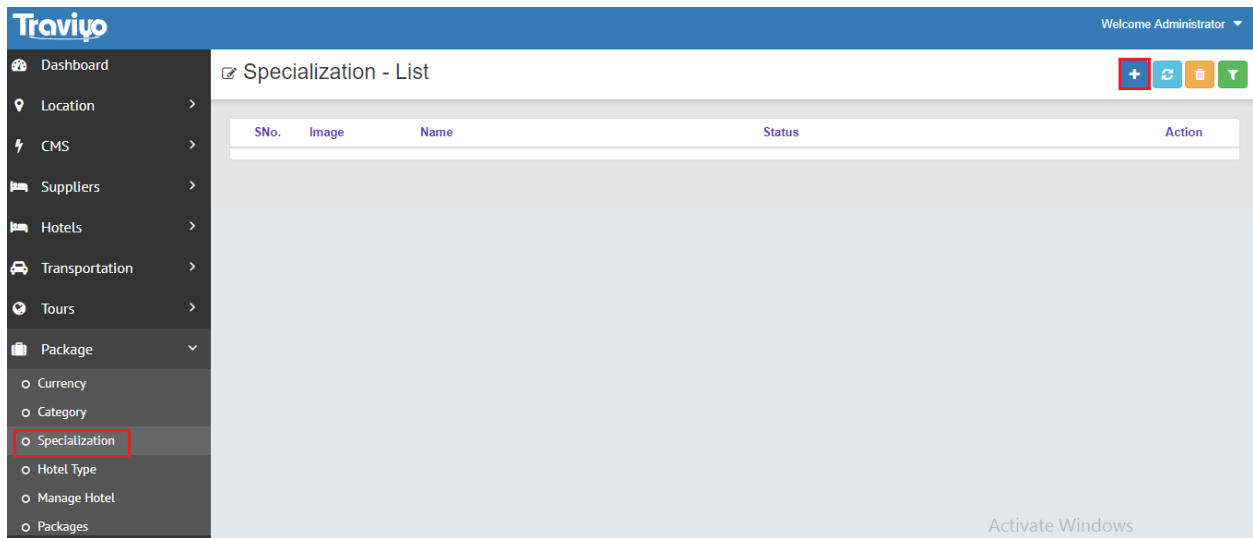


After clicking on filter that particular filtered option will reflect on your screen as shown on the image below.

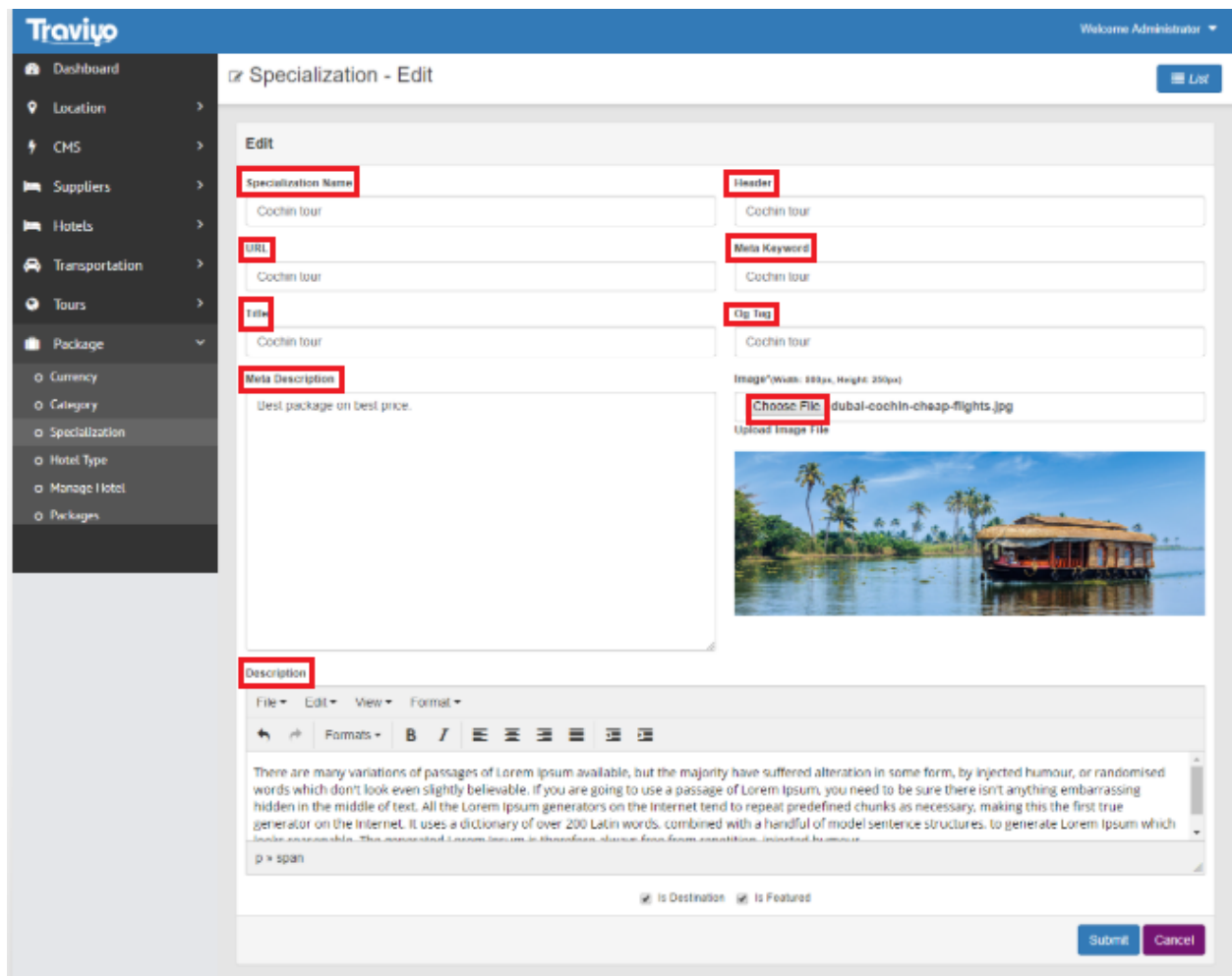


Now after adding category for your package, you need to add specialization sub module, click on specialization you will see add option on the top right corner click on add option.

2.2.2.3 Specialization



After clicking on the add option you will find few field displaying on the screen as shown in the picture below. Fill all of the fields as per your requirements.



After filling all of the fields you will find two checkbox below “IS DESTINATION” and “IS FEATURED” both of the options are optional if you want to display this specialization on the menus of your website check in “IS DESTINATION” checkbox otherwise leave it unchecked similarly if you want to display this specialization on the home page of your website check in “IS FEATURED” checkbox otherwise leave it unchecked and click on submit button.

Traviyo

Welcome Administrator

Dashboard

Location

CMS

Suppliers

Hotels

Transportation

Tours

Package

Currency

Category

Specialization

Hotel Type

Manage Hotel

Packages

Description

File Edit View Format

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Formats

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There are many variations of passages of Lorem Ipsum available, but the majority have suffered alteration in some form, by injected humour, or randomised words which don't look even slightly believable. If you are going to use a passage of Lorem Ipsum, you need to be sure there isn't anything embarrassing hidden in the middle of text. All the Lorem Ipsum generators on the Internet tend to repeat predefined chunks as necessary, making this the first true generator on the Internet. It uses a dictionary of over 200 Latin words, combined with a handful of model sentence structures, to generate Lorem Ipsum which looks reasonable. The generated Lorem Ipsum is therefore always free from repetition, injected humour, or non-prophetic-looking content.

p » span

☒ Is Destination

☒ Is Featured

Activate Windows

Go to Settings to activate Windows.

Once you will click on submit button you will see the specialization list that you have added.

Traviyo

Welcome Administrator

Dashboard

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Specialization

Hotel Type

Manage Hotel

Packages


Specialization - List

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SNo.	Image	Name	Status	Action
1		Cochin tour	Active	✎ 🗑

Activate Windows

Go to Settings to activate Windows.

After this if you want to filter any specialization click on the top right corner fourth option which is **filter** option there you can **filter** your list.

Traviyo

Welcome Administrator

Dashboard

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Package

- Currency
- Category
- Specialization
- Hotel Type
- Manage Hotel
- Packages

Specialization - List

SNo.	Image	Name	Status	Action
1		Cochin tour	Active	Edit Delete

Activate Windows
Go to Settings to activate Windows.

After clicking on filter below page will reflect on your screen, add your specialization name and click on filter.

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Transportation

Tours

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- Currency
- Category
- Specialization
- Hotel Type
- Manage Hotel
- Packages

Specialization - Filter

List

Filter

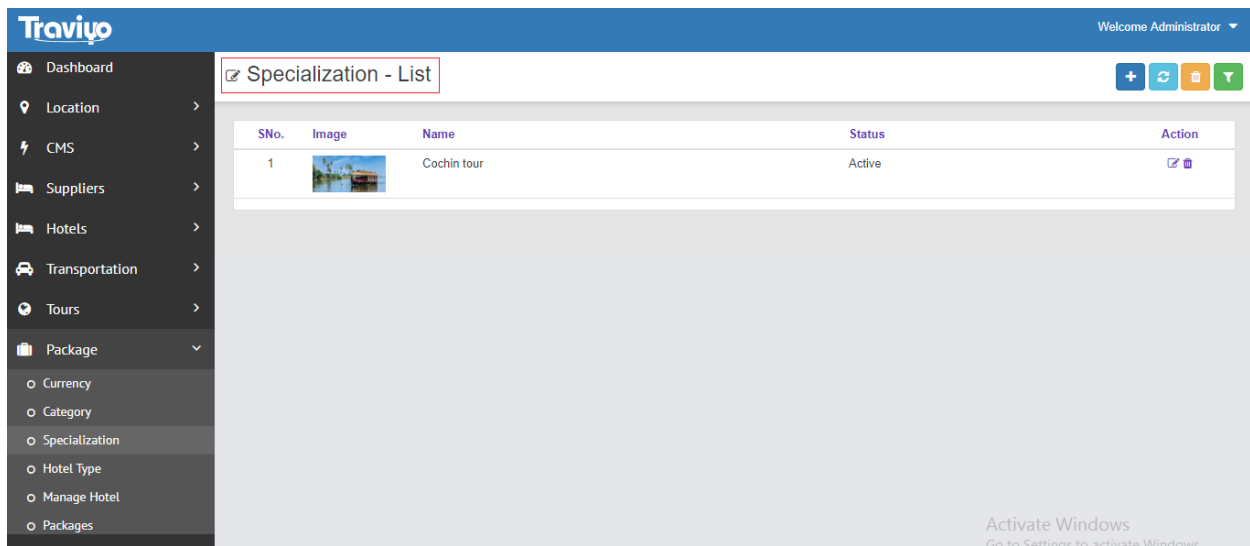
Specialization Name

Cochin tour

Filter

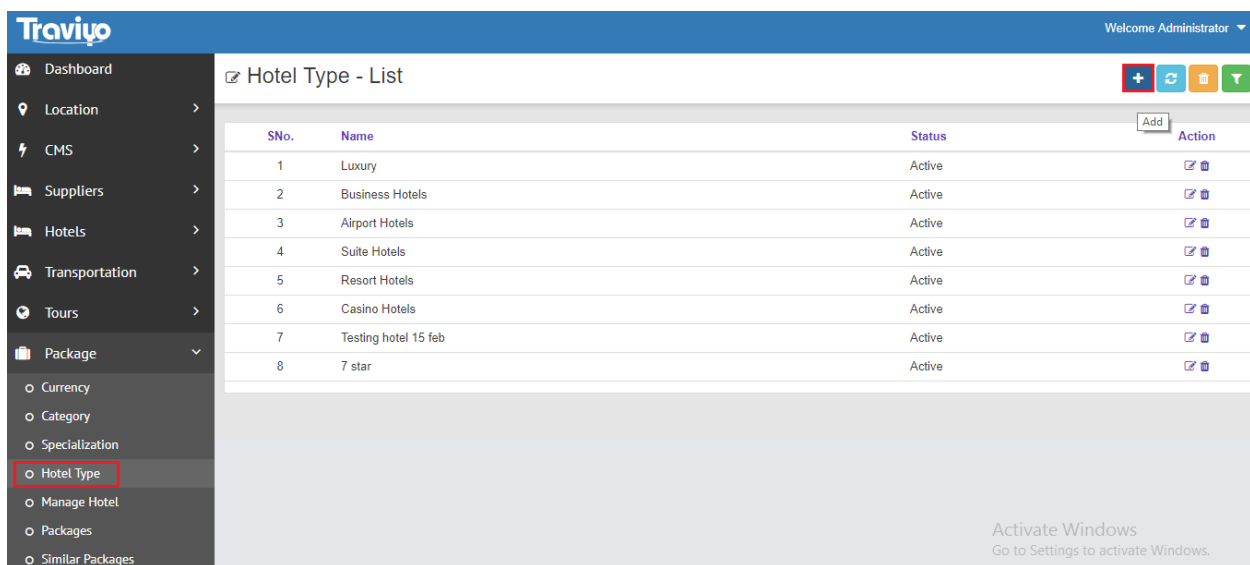
Activate Windows

When you will click on filter option below page will reflect on your screen.



After that you need to add hotel type for creating package. To add hotel click on sub module **“Hotel Type”**, you will see add option on the top right corner click on add option.

2.2.2.4. Hotel Type



After clicking on add option you will see few fields displaying on the screen as shown in the picture given below. User need to fill out those fields and click on submit Button.

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Specialization

Hotel Type

Manage Hotel

Packages

Similar Packages

Hotel Type - Create

List

Hotel Type

Taj

Submit

Cancel

Activate Windows
Go to Settings to activate Windows.

After submitting the form, user can see the added **Hotel type List**. After this if you want to filter any **Hotel Type** click on the top right corner fourth option which is filter option. (Shown on the picture below) .

Traviyo

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Category

Specialization

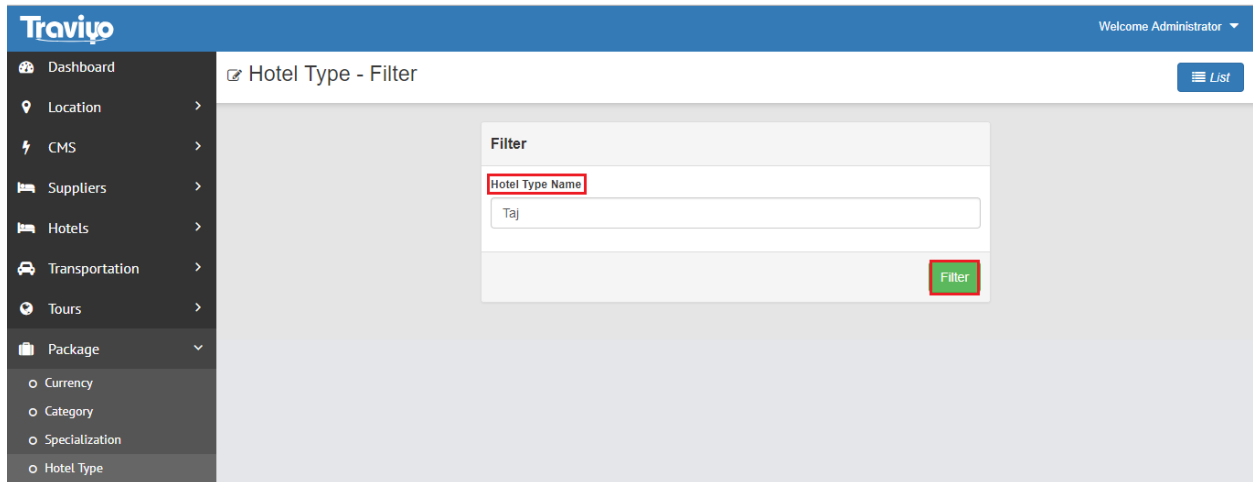
Hotel Type

Hotel Type - List

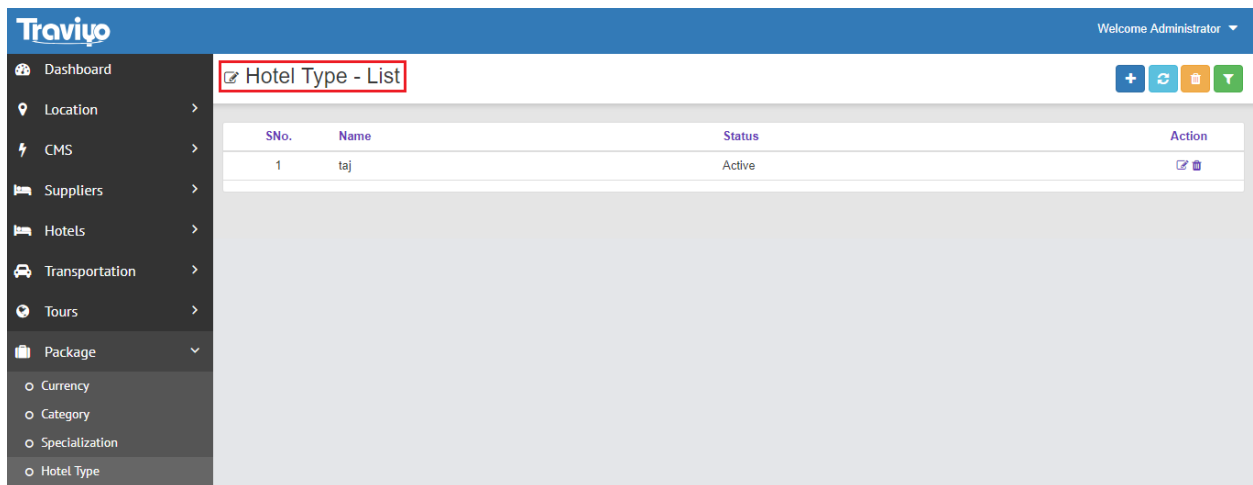
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SNo.	Name	Status	Action
1	Luxury	Active	✎️ 🗑️
2	Business Hotels	Active	✎️ 🗑️
3	Airport Hotels	Active	✎️ 🗑️
4	Suite Hotels	Active	✎️ 🗑️
5	Resort Hotels	Active	✎️ 🗑️
6	Casino Hotels	Active	✎️ 🗑️
7	Testing hotel 15 feb	Active	✎️ 🗑️
8	7 star	Active	✎️ 🗑️
9	taj	Active	✎️ 🗑️

After clicking on filter below page will reflect on your screen, add your hotel name and click on filter.



After clicking on filter your hotel will get filtered as shown in the picture below.



2.2.2.5. Manage Hotel

After that you need to **Manage Hotel** for creating package.

To manage hotel, click on sub module “**Manage hotel**”, you will see add option on the top right corner click on add option.

Traviyo Welcome Administrator

Dashboard Location CMS Suppliers Hotels Transportation Tours Package

- Currency
- Category
- Specialization
- Hotel Type
- Manage Hotel

Hotel - List

SNo.	Name	Hotel Type	Country	State	City	Status	Action
1	Obroi Hotel	Luxury	India	Goa	Panaji	Active	Edit Delete
2	kempenski leela	Suite Hotels	India	Goa	Panaji	Active	Edit Delete
3	Country inn	Airport Hotels	India	Goa	Panaji	Active	Edit Delete
4	Country Inn	Luxury	India	Goa	Panaji	Active	Edit Delete
5	crown plaza	7 star	India	Assam	Lakhimpur	Active	Edit Delete
6	Price testing	Casino Hotels	Switzerland	Switzerland	Bern	Active	Edit Delete
7	Testing manage hotel 15 feb	Testing hotel 15 feb	India	Goa	Madgaon	Active	Edit Delete
8	hotel565	7 star		California	San Francisco	Active	Edit Delete
9	mortel256	Casino Hotels		California	San Francisco	Active	Edit Delete
10	mortel455	Business Hotels		California	Los Angeles	Active	Edit Delete

First Previous 1 2 3 Next Last

After clicking on add option you will find few fields displaying on the screen as shown in the picture below. User need to fill out those fields after filling fields click on submit option.

Traviyo Welcome Administrator

Dashboard Location CMS Suppliers Hotels Transportation Tours Package

- Currency
- Category
- Specialization
- Hotel Type
- Manage Hotel
- Packages
- Similar Packages

Hotel - Create

Edit

Hotel Name: taj Hotel Type: taj

Country: India State: Kerela

City: Cochin Price: 10000

Description: Description

Submit Cancel

Activate Windows Go to Settings to activate Windows.

After submitting the form, User can see the managed hotel list.

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Manage Hotel

Hotel - List

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SNo.	Name	Hotel Type	Country	State	City	Status	Action
1	taj	taj	India	Kerela	Cochin	Active	✎ 🗑️
2	Obroi Hotel	Luxury	India	Goa	Panaji	Active	✎ 🗑️
3	kempenski leela	Suite Hotels	India	Goa	Panaji	Active	✎ 🗑️
4	Country inn	Airport Hotels	India	Goa	Panaji	Active	✎ 🗑️
5	Country Inn	Luxury	India	Goa	Panaji	Active	✎ 🗑️
6	crown plaza	7 star	India	Assam	Lakhimpur	Active	✎ 🗑️
7	Price testing	Casino Hotels	Switzerland	Switzerland	Bern	Active	✎ 🗑️
8	Testing manage hotel 15 feb	Testing hotel 15 feb	India	Goa	Madgaon	Active	✎ 🗑️
9	hotel565	7 star		California	San Francisco	Active	✎ 🗑️
10	mortel256	Casino Hotels		California	San Francisco	Active	✎ 🗑️

First
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After this if you want to filter any managed hotel, click on the top right corner fourth option which is filter option there you can filter your options.

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Hotel Type
Manage Hotel

Hotel - List

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SNo.	Name	Hotel Type	Country	State	City	Status	Action
1	taj	taj	India	Kerela	Cochin	Active	✎ 🗑️
2	Obroi Hotel	Luxury	India	Goa	Panaji	Active	✎ 🗑️
3	kempenski leela	Suite Hotels	India	Goa	Panaji	Active	✎ 🗑️
4	Country inn	Airport Hotels	India	Goa	Panaji	Active	✎ 🗑️
5	Country Inn	Luxury	India	Goa	Panaji	Active	✎ 🗑️
6	crown plaza	7 star	India	Assam	Lakhimpur	Active	✎ 🗑️
7	Price testing	Casino Hotels	Switzerland	Switzerland	Bern	Active	✎ 🗑️
8	Testing manage hotel 15 feb	Testing hotel 15 feb	India	Goa	Madgaon	Active	✎ 🗑️
9	hotel565	7 star		California	San Francisco	Active	✎ 🗑️
10	mortel256	Casino Hotels		California	San Francisco	Active	✎ 🗑️

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After clicking on filter below page will reflect on your screen, add your specialization name and click on filter.

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Manage Hotel

Hotel - Filter

List

Hotel Name

taj

Country

India

City

Cochin

Hotel Type

taj

State

Kerela

Filter

When you will click on filter option you will see filtered list on your screen as shown on the picture below.

Traviyo

Welcome Administrator

Dashboard

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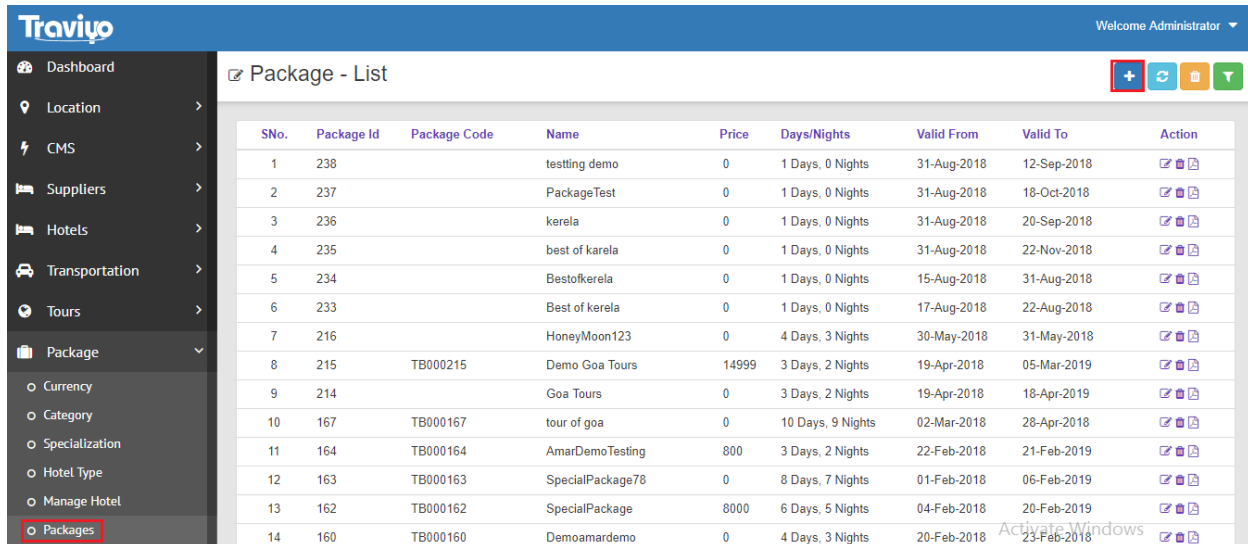
Hotel - List











































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SNo.	Name	Hotel Type	Country	State	City	Status	Action
1	taj	taj	India	Kerela	Cochin	Active	✎ 🗑️

2.2.2.6. Packages

After manage hotel now you will click on sub module **“Packages”**, to add package details, after clicking on Packages you will see add option on the top right corner click on add option.



SNo.	Package Id	Package Code	Name	Price	Days/Nights	Valid From	Valid To	Action
1	238		testing demo	0	1 Days, 0 Nights	31-Aug-2018	12-Sep-2018	  
2	237		PackageTest	0	1 Days, 0 Nights	31-Aug-2018	18-Oct-2018	  
3	236		kerela	0	1 Days, 0 Nights	31-Aug-2018	20-Sep-2018	  
4	235		best of karela	0	1 Days, 0 Nights	31-Aug-2018	22-Nov-2018	  
5	234		Bestofkerela	0	1 Days, 0 Nights	15-Aug-2018	31-Aug-2018	  
6	233		Best of kerela	0	1 Days, 0 Nights	17-Aug-2018	22-Aug-2018	  
7	216		HoneyMoon123	0	4 Days, 3 Nights	30-May-2018	31-May-2018	  
8	215	TB000215	Demo Goa Tours	14999	3 Days, 2 Nights	19-Apr-2018	05-Mar-2019	  
9	214		Goa Tours	0	3 Days, 2 Nights	19-Apr-2018	18-Apr-2019	  
10	167	TB000167	tour of goa	0	10 Days, 9 Nights	02-Mar-2018	28-Apr-2018	  
11	164	TB000164	AmarDemoTesting	800	3 Days, 2 Nights	22-Feb-2018	21-Feb-2019	  
12	163	TB000163	SpecialPackage78	0	8 Days, 7 Nights	01-Feb-2018	06-Feb-2019	  
13	162	TB000162	SpecialPackage	8000	6 Days, 5 Nights	04-Feb-2018	20-Feb-2019	  
14	160	TB000160	Demoamardemo	0	4 Days, 3 Nights	20-Feb-2018	23-Feb-2018	  

After clicking on add first option of packages will reflect on screen which is **“Overview”** option you will see few fields displaying on the screen as shown in the picture given below. User need to fill all the fields as all the options are compulsory to attempt.

Now add **no. of days** after adding no. of days click on select city option which is highlighted on the picture above. Now add city and the no. of days (ki kitane din kon c city mai stay krne vale hai)

For eg.= You added location for Kerala there you are going to visit 2 place i.e. cochin and munnar . now you added no. of days = 4 days, then you cickd on select city option there u selected your city as Cochin and no. of day for tour in cochin you selected 2 days for cochin, then again you will asked to add city and days is that you add your city as munnar and remaining days will be added now that is 2 days.

Now the list of the days will reflect on the screen below as “route Map” now fill remaining field and click on save and continue.

Traviyo Welcome Administrator

Package - Create (Cochin) List

Overview **Hotels** Specializations Itinerary Tour Gallery Transportation Package Policy Pricing

Package Name **Package Code**

Category **Valid From** **Valid To**

URL **Meta Keyword**

Title **Og Tag**

Meta Description

Thumb Image Width: 492px, Height: 405px No file chosen **No of Days(Max 99 Days)**

Route Map

SNo.	City	No of Days
1	Cochin	3
2	Kochi	1

Package Include

☒ Flights ☒ Hotel Stay ☒ Meals ☒ Transfers ☒ Sightseeing ☐ Cruise

After clicking on save and continue next page will automatically open on screen that is **hotels**.

Traviyo Welcome Administrator

Package - Create (Cochin) List

Overview **Hotels** Specializations Itinerary Tour Gallery Transportation Package Policy Pricing

Luxury			
Night	City	Hotel	
1	Cochin		≡
2	Cochin		≡

Business Hotels			
Night	City	Hotel	
1	Cochin		≡
2	Cochin		≡

Now here you can add hotel according to city and the hotel type. For adding hotel and city you will first find that hotel you added earlier on hotel type and click on the side three horizontal lines as highlighted on the picture below.

Tours	
Package	
Currency	
Category	
Specialization	
Hotel Type	
Manage Hotel	

taj		
Night	City	Hotel
1	Cochin	
2	Cochin	
3	Cochin	
4	Kochi	

After clicking on that option you see 2 options “**Edit and Reset**” click on edit to add your hotel and your city, you can see the option highlighted below.

Transportation	
Tours	
Package	
Currency	
Category	
Specialization	
Hotel Type	
Manage Hotel	

taj		
Night	City	Hotel
1	Cochin	
2	Cochin	Edit
3	Cochin	Reset
4	Kochi	

Click on Edit option to add the hotel and city below option will display on your screen, fill all of the options (**City, hotel type and hotel**) and the last option is **Apply to Each Day in Current City** if you want to add same hotel for all days then only check this option otherwise leave it unchecked. And click on **save**.

Hotels

City

Cochin

Hotel Type

taj

Hotel

taj

Apply To Each Day in Current City

☒

Save

Reset

Now click on save and continue option and proceed to next option

Traviyo

Welcome Administrator

Dashboard

Location

CMS

Suppliers

Hotels

Transportation

Tours

Package

Currency

Category

Specialization

Hotel Type

Manage Hotel

Packages

Testing hotel 15 feb

Night	City	Hotel
1	Cochin	
2	Cochin	
3	Cochin	
4	Kochi	

7 star

Night	City	Hotel
1	Cochin	
2	Cochin	
3	Cochin	
4	Kochi	

taj

Night	City	Hotel
1	Cochin	taj
2	Cochin	taj
3	Cochin	taj
4	Kochi	taj

Activate

Skip

Save & Continue

After adding hotel now next option will continue that is specialization now here fill all of the fields as per your requirements and click on **save and continue** option.

Traviyo

Welcome Administrator

Dashboard

Location

CMS

Suppliers

Hotels

Transportation

Tours

Package

Currency

Category

Specialization

Hotel Type

Package - Create (Cochin)

List

OverviewHotelsSpecializationsItineraryTour GalleryTransportationPackage PolicyPricing

Currency

Rupee

Price

10000

Discount (%)

30

Price Type

On Demand

Publish To Public

Publish To Public

SPECIALIZATIONS

Cochin tour

Skip

Save & Continue

After adding specialization fields now next option will continue that is itinerary now here you can add day wise itinerary here. After adding itinerary click on **save and continue** option and proceed. You can see all the options below.

Traviyo

Welcome Administrator

Dashboard

Location

CMS

Suppliers

Hotels

Transportation

Tours

Package

Currency

Category

Specialization

Hotel Type

Manage Hotel

Packages

Similar Packages

Package - Create (Cochin)

List

OverviewHotelsSpecializationsItineraryTour GalleryTransportationPackage PolicyPricing

City : Cochin, Day # 1 Heading & Description

Heading

↶

↷

Formats

12pt

B

I

U

A

<>

p

City : Cochin, Day # 2 Heading & Description

Heading

↶

↷

Formats

12pt

B

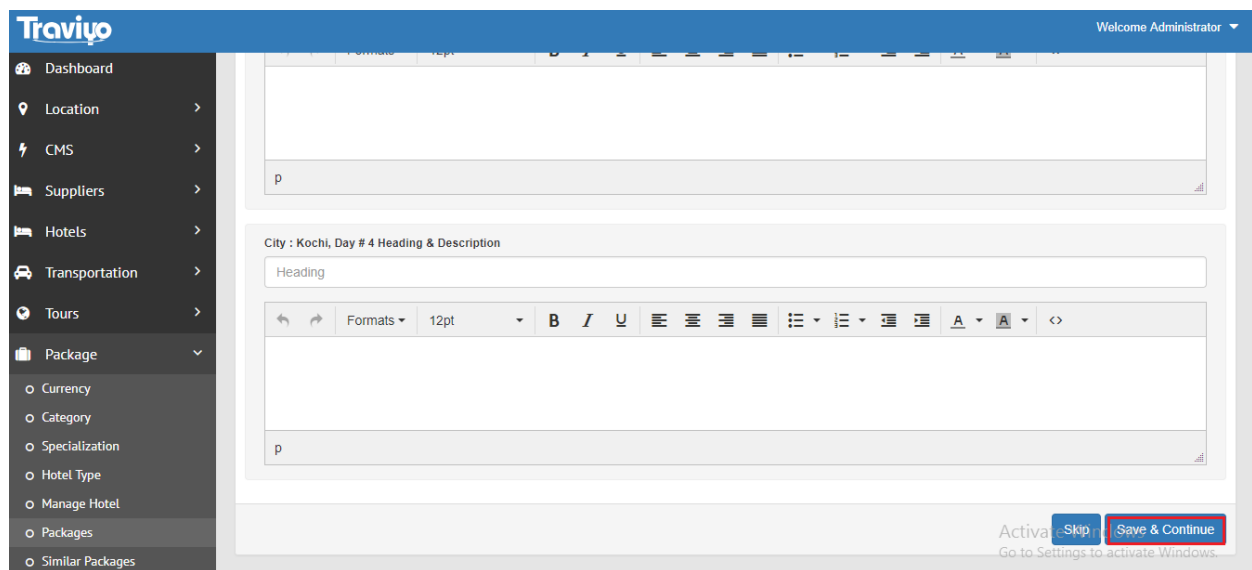
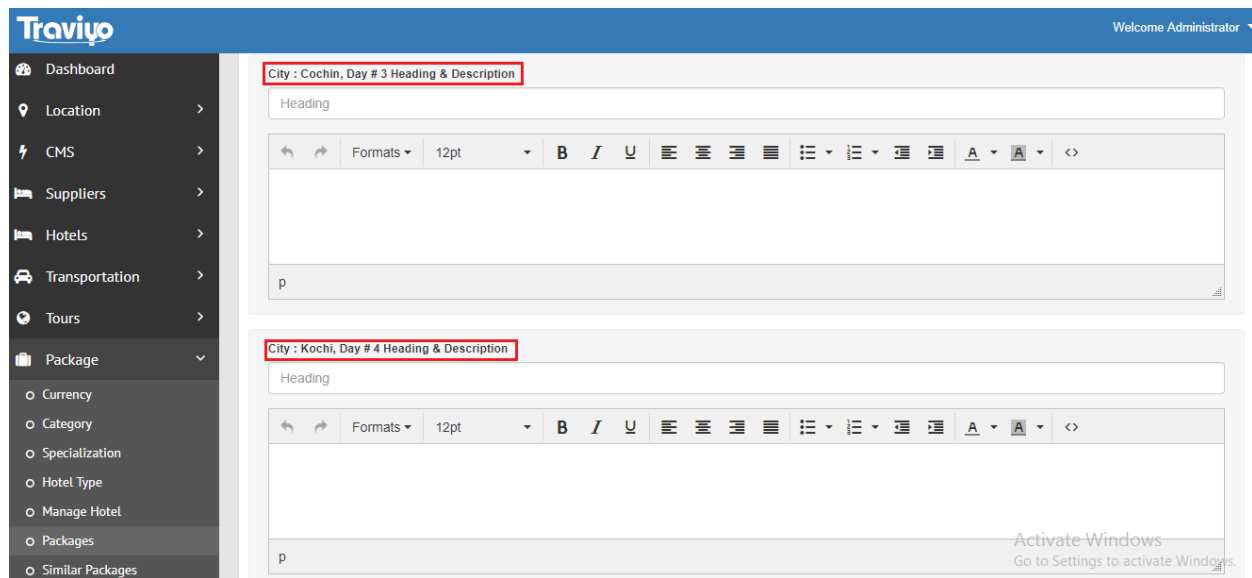
I

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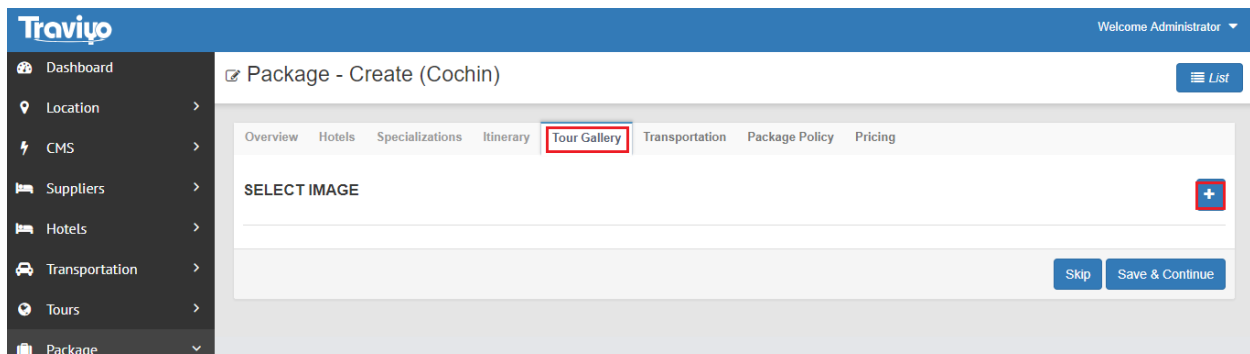
A

<>

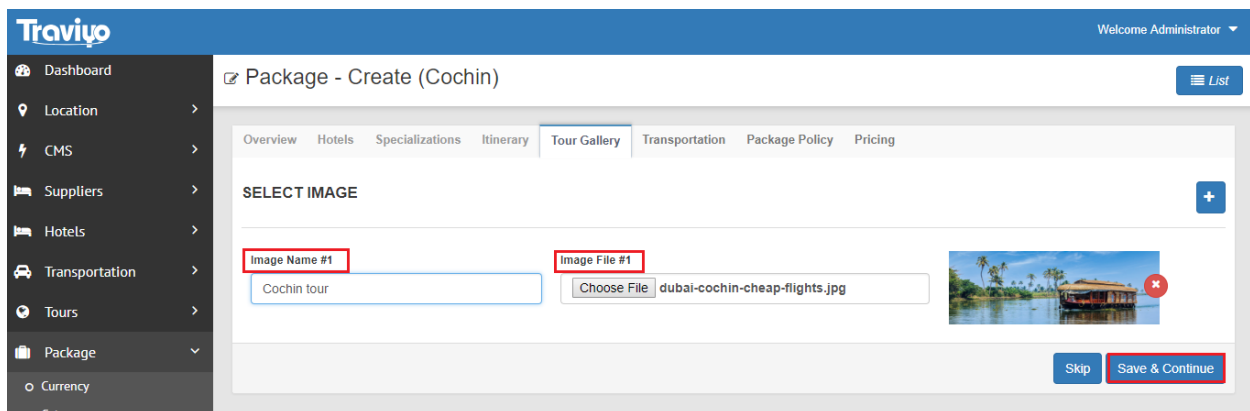
Activate Windows
Go to Settings to activate Windows.



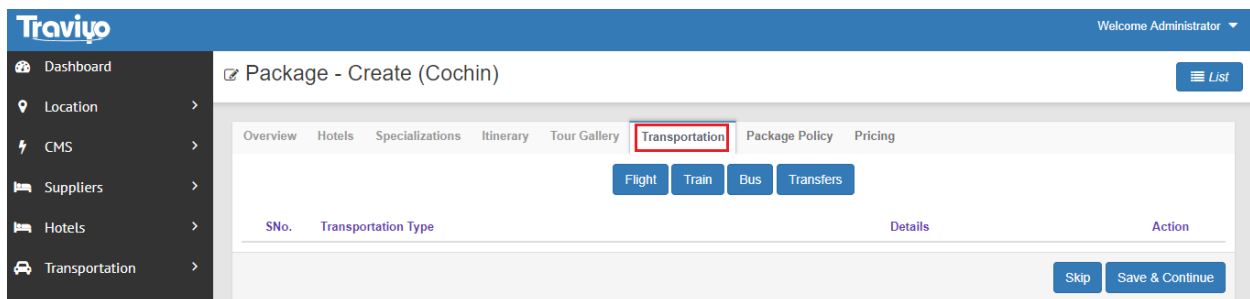
After adding itinerary next option tour gallery will reflect on your screen. Here you will see add option at right corner which is highlighted on the picture below click on that option to add image.



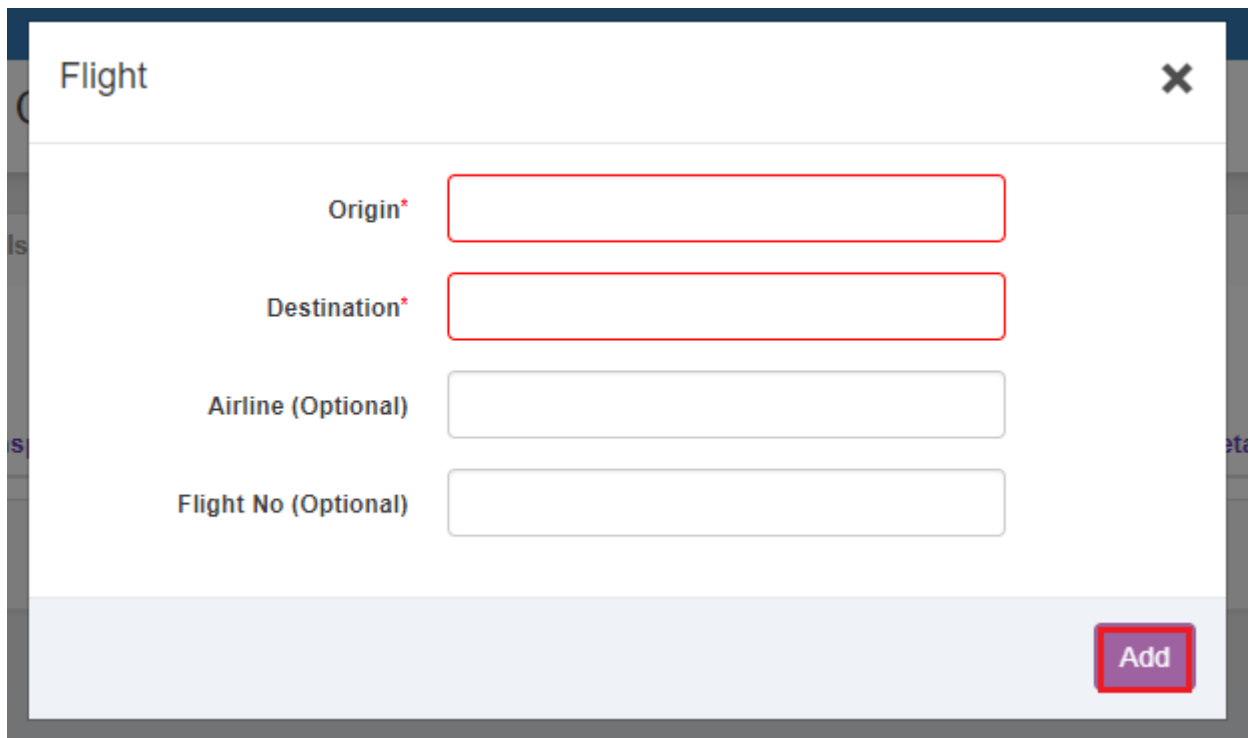
Now for adding image in your package click on **choose image** and select a suitable image for your package, also name the image in **image name** field as shown on the picture below. Now click on save and continue option.



After adding tour gallery next page will continue of your package that is transportation. In this field there are four option flight, train, bus and transfers.



Flight: click on flight some fields will reflect on your screen those are origin, destination, and airline and flight no. Airline and flight no. is optional.

A screenshot of a 'Flight' form dialog box. The dialog has a title bar with the word 'Flight' and a close button (X) in the top right corner. The form contains four input fields: 'Origin*' (required), 'Destination*' (required), 'Airline (Optional)', and 'Flight No (Optional)'. The 'Origin*' and 'Destination*' fields are highlighted with red borders. At the bottom right of the dialog is a red 'Add' button.

Flight

Origin*

Destination*

Airline (Optional)

Flight No (Optional)

Add

Train: Click on train few field will you see on screen as shown on the picture below. The fields are Origin, Destination, Train name, train number and class, but train name and train number is optional.

Train

✕

Origin*

Destination*

Train Name (Optional)

Train Number (Optional)

Class*

None ▾

Add

Bus: click on bus few fields will reflect on your screen that is Origin, destination and bus number in this all of the fields are compulsory to fill.

Bus

Origin*

Destination*

Bus Type*

None

Add

Transfer: click on transfer option in this section you will see options over there those are transfer, transfer by and AC. All of the fields are compulsory to fill.

Transportation

Transfer*

Select Transfer Type

Transfer By*

Select Transfer By Vehicle

AC*

Select Is AC

Add

After filling all the fields in tour gallery one list will form of all the fields as shown in the picture below. And now click on save and continue option for proceeding on next option.

The screenshot shows the 'Package - Create (Cochin)' page in the Traviyo admin interface. The left sidebar contains navigation links: Dashboard, Location, CMS, Suppliers, Hotels, Transportation, Tours, Package (with sub-links for Currency, Category, Specialization, and Hotel Type), and Hotel Type. The main content area has tabs for Overview, Hotels, Specializations, Itinerary, Tour Gallery, Transportation (selected), Package Policy, and Pricing. Under the 'Transportation' tab, there are buttons for Flight, Train, Bus, and Transfers. Below these is a table with columns: SNo., Transportation Type, Details, and Action.

SNo.	Transportation Type	Details	Action
	Flight	From : Karela To : Cochin	
	Train	From : karela To : cochin Class :AC First Class	
	Bus	From : Karela To : cochin Bus Type :Volvo	
	Transfer	Transfer Type : Airport Pickup Transfer By : Private Car (AC)	

At the bottom right of the table, there are two buttons: 'Skip' and 'Save & Continue' (highlighted with a red border).

After adding transportation next page will continue that is **package policy**.

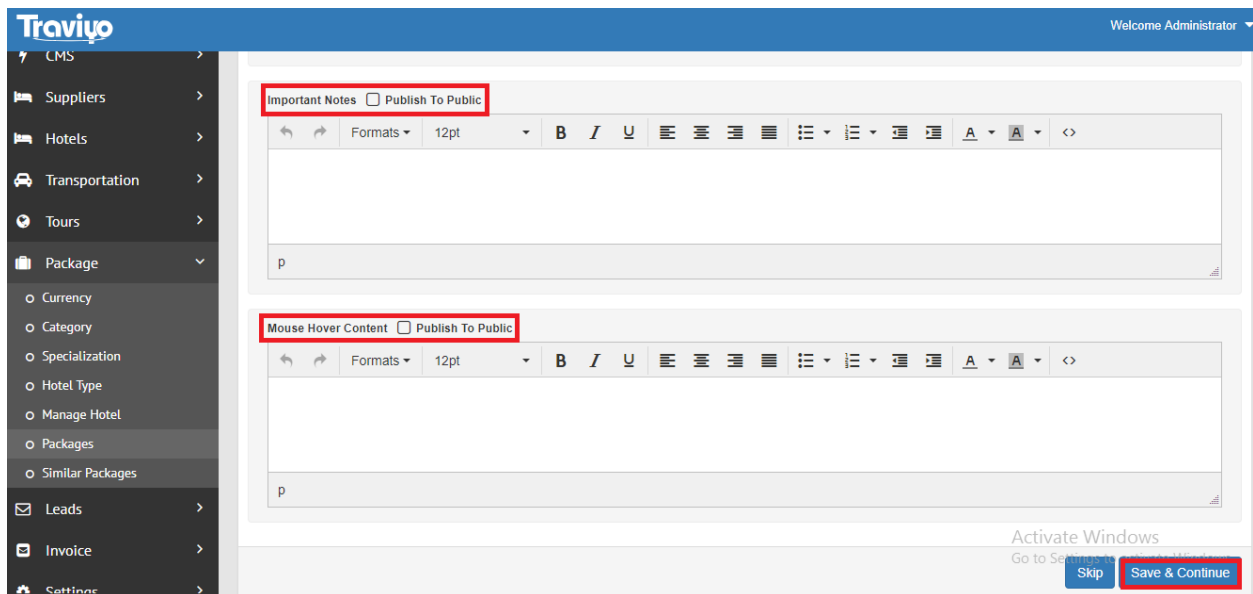
The screenshot shows the 'Package - Create (Cochin)' page with the 'Package Policy' tab selected. The left sidebar is the same as in the previous screenshot. The main content area has tabs for Overview, Hotels, Specializations, Itinerary, Tour Gallery, Transportation, Package Policy (selected), and Pricing. The 'Package Policy' tab contains a 'Short Description' label, a 'Publish To Public' checkbox, and a rich text editor with various formatting options (bold, italic, underline, text color, background color, link, unlink, etc.). The text area is currently empty, with a small 'p' visible at the bottom left.

Here you will describe about your package, you can see all of the options on the picture below. And on top of the box at left corner you will see one option that is Publish to public this option is optional if you will check it, it will display on the website otherwise it will not reflect on website. And now click on save

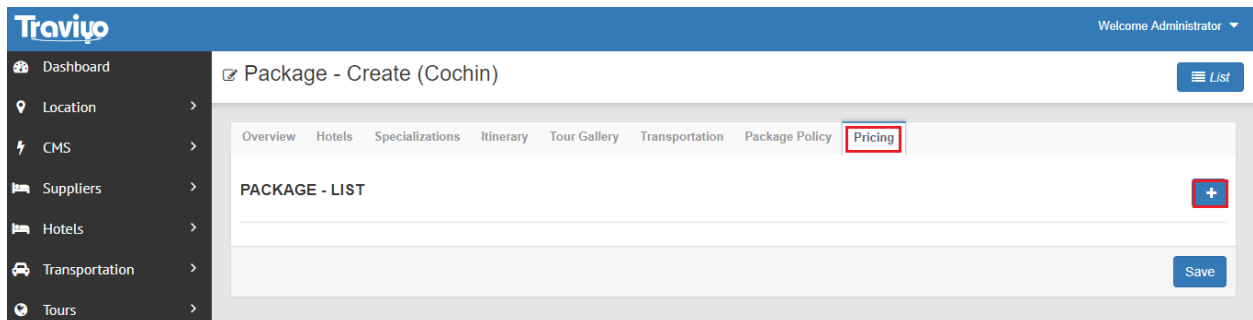
and continue option.

The screenshot shows the Traviyo CMS interface. On the left is a sidebar menu with options: CMS, Suppliers, Hotels, Transportation, Tours, Package (expanded), Currency, Category, Specialization, Hotel Type, Manage Hotel, Packages, Similar Packages, Leads, and Invoice. The main header is blue with the Traviyo logo and 'Welcome Administrator'. The main content area is titled 'Package - List (Cochin)' and has a 'List' button. Below the title is a tabbed interface with tabs: Overview, Hotels, Specializations, Itinerary, Tour Gallery, Transportation, Package Policy (selected), and Pricing. The 'Package Policy' tab contains two text editors. The first is labeled 'Short Description' with a 'Publish To Public' checkbox. The second is labeled 'Full Description' with a 'Publish To Public' checkbox. Both editors have a rich text toolbar and a text area containing the letter 'p'. An 'Activate Windows' watermark is visible in the bottom right corner.

This screenshot shows the same Traviyo CMS interface but with the 'Package Policy' tab expanded to show three sub-sections. The first sub-section is 'Inclusion' with a 'Publish To Public' checkbox. The second is 'Exclusion' with a 'Publish To Public' checkbox. The third is 'Cancellation Policy' with a 'Publish To Public' checkbox. Each sub-section has a rich text editor with a toolbar and a text area containing the letter 'p'. The 'Activate Windows' watermark is also present.



After adding package policy next page will continue that is pricing. Now you will find an add option in right corner click on that for adding price to your package.



Now here you can manage price and the validity of the package according to hotel type and number of passengers, now click on **save** to add this on package.

Price Management

From*

From Date

To*

To Date

Hotel Type	2Pax	4Pax	6Pax	8Pax	Extra Adult	Extra Child	Extra Infant
Luxury							
Business Hotels							
Airport Hotels							
Suite Hotels							
Resort Hotels							
Casino Hotels							
Testing hotel 15 feb							
7 star							
taj							

Save

After clicking on save option one list will form with validity date of all hotel types and its price, now again click on **save** option. You will see the list of package on the screen. Then proceed to next sub module that is **similar packages**.

Traviyo

Welcome Administrator

Dashboard

Location

CMS

Suppliers

Hotels

Transportation

Tours

Package

Currency

Category

Specialization

Hotel Type

Manage Hotel

Packages

Similar Packages

7 star

taj

15-Sep-2018 To 26-Sep-2018

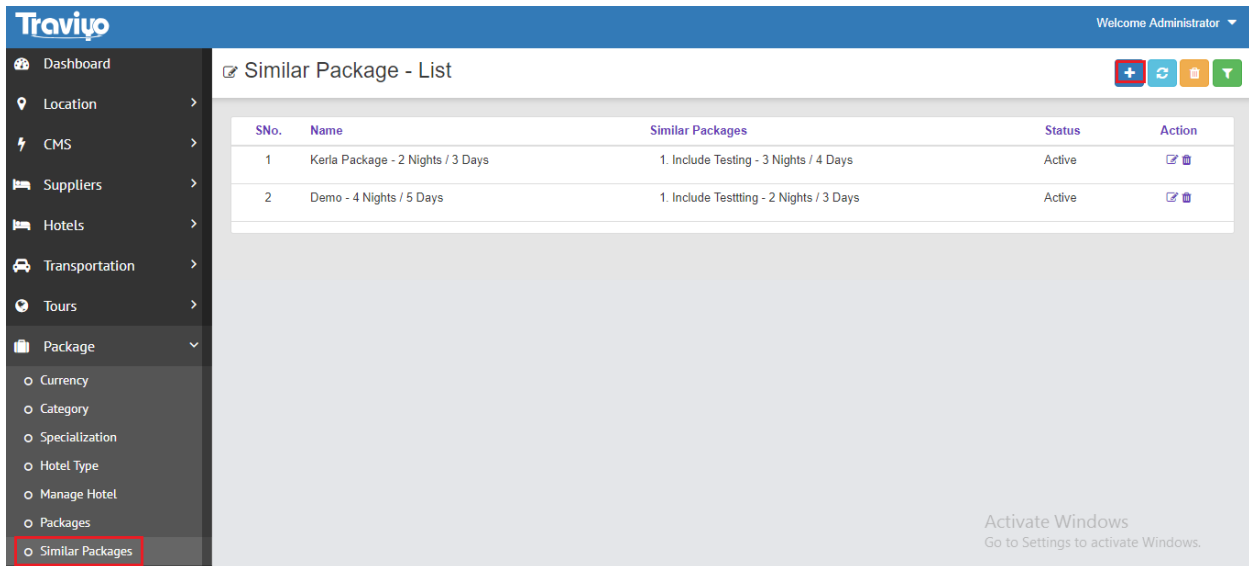
Hotel Type	2Pax	4Pax	6Pax	8Pax	Extra Adult	Extra Child	Extra Infant	Action
Luxury	1000	2000	3000	4000	5000	1000	10000	
Business Hotels								
Airport Hotels								
Suite Hotels								
Resort Hotels								
Casino Hotels								
Testing hotel 15 feb								
7 star								
taj								

Activate Windows

Go to Settings to activate Windows.

Save

Now click on similar packages sub module here on top right corner first option will be of add you can see the same on image below click on that option. After clicking on add option you will see two fields on your screen that is **packages and similar packages** add the fields accordingly and click on submit.

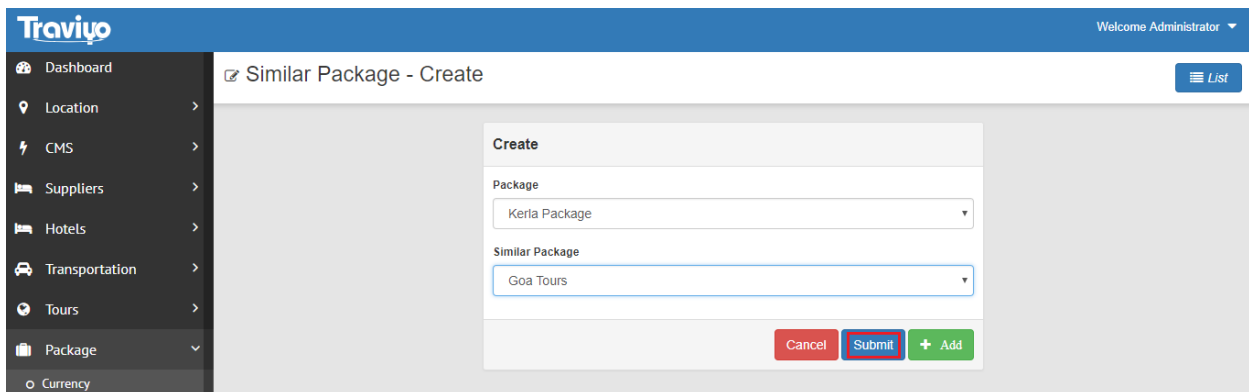


The screenshot shows the Traviyo admin dashboard. The left sidebar contains a menu with 'Similar Packages' highlighted with a red box. The main content area displays the 'Similar Package - List' page with a table of packages.

SNo.	Name	Similar Packages	Status	Action
1	Kerla Package - 2 Nights / 3 Days	1. Include Testing - 3 Nights / 4 Days	Active	Edit Delete
2	Demo - 4 Nights / 5 Days	1. Include Testtting - 2 Nights / 3 Days	Active	Edit Delete

2.2.2.7 Similar Packages

After clicking on add option you will see two fields on your screen that is **packages and similar packages** add the fields accordingly and click on submit.



The screenshot shows the Traviyo admin dashboard. The left sidebar contains a menu with 'Similar Packages' highlighted with a red box. The main content area displays the 'Similar Package - Create' page with a form to create a new similar package.

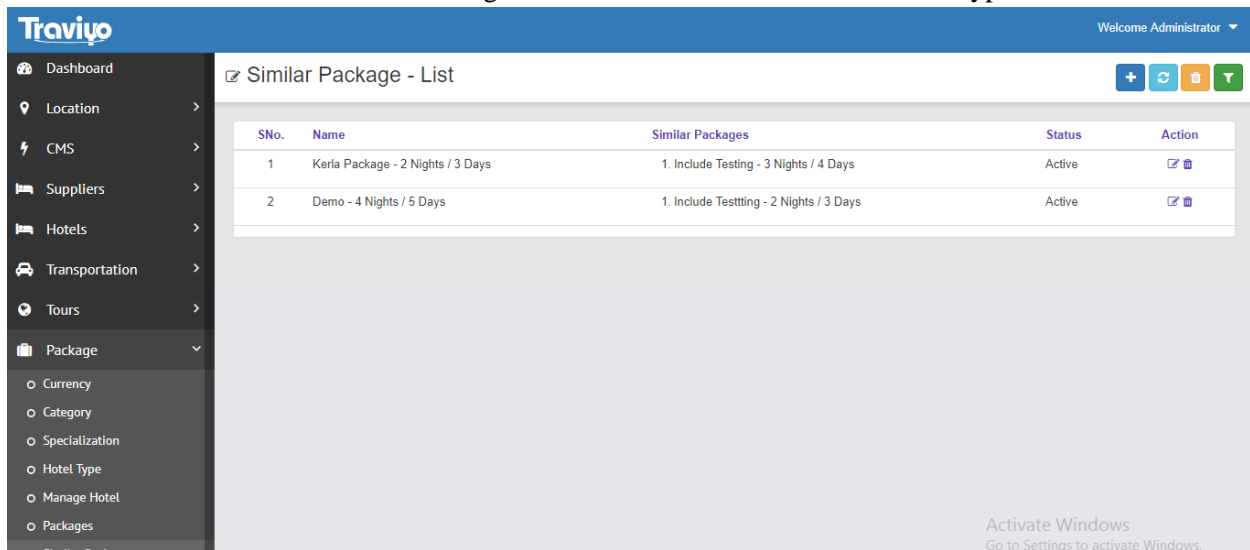
Create

Package: Kerla Package

Similar Package: Goa Tours

Buttons: Cancel, Submit, + Add

Click on submit Button. After submitting the form, User can see the added hotel type in List.

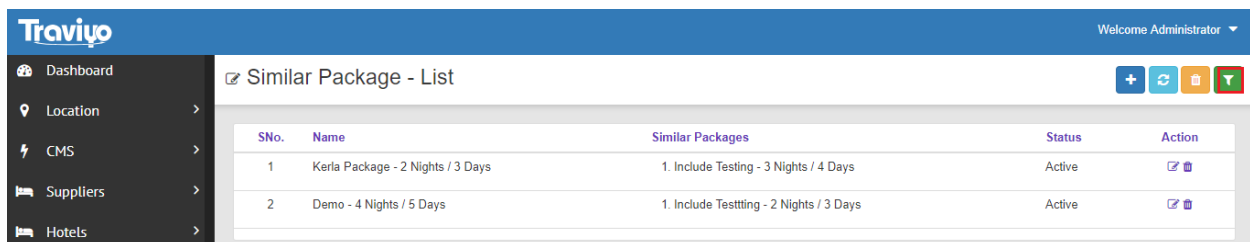


The screenshot shows the Traviyo admin dashboard. The top header is blue with the Traviyo logo on the left and 'Welcome Administrator' on the right. The left sidebar is dark grey with a list of menu items: Dashboard, Location, CMS, Suppliers, Hotels, Transportation, Tours, and Package. The 'Package' item is expanded, showing sub-items: Currency, Category, Specialization, Hotel Type, Manage Hotel, and Packages. The main content area is titled 'Similar Package - List' and contains a table with the following data:

SNo.	Name	Similar Packages	Status	Action
1	Kerla Package - 2 Nights / 3 Days	1. Include Testing - 3 Nights / 4 Days	Active	Edit Delete
2	Demo - 4 Nights / 5 Days	1. Include Testtling - 2 Nights / 3 Days	Active	Edit Delete

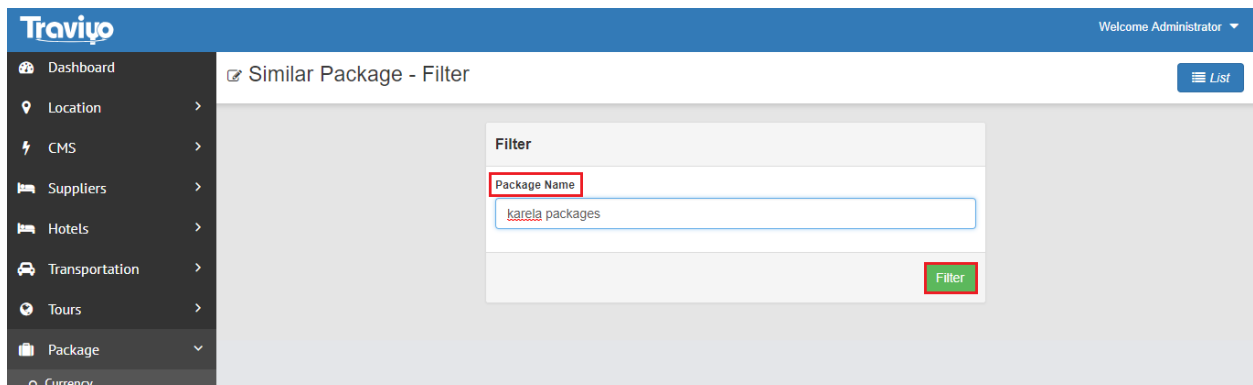
At the bottom right of the page, there is a watermark that says 'Activate Windows Go to Settings to activate Windows.'

After this if you want to filter any similar packages click on the top right corner fourth option which is filter option there you can filter your similar packages.

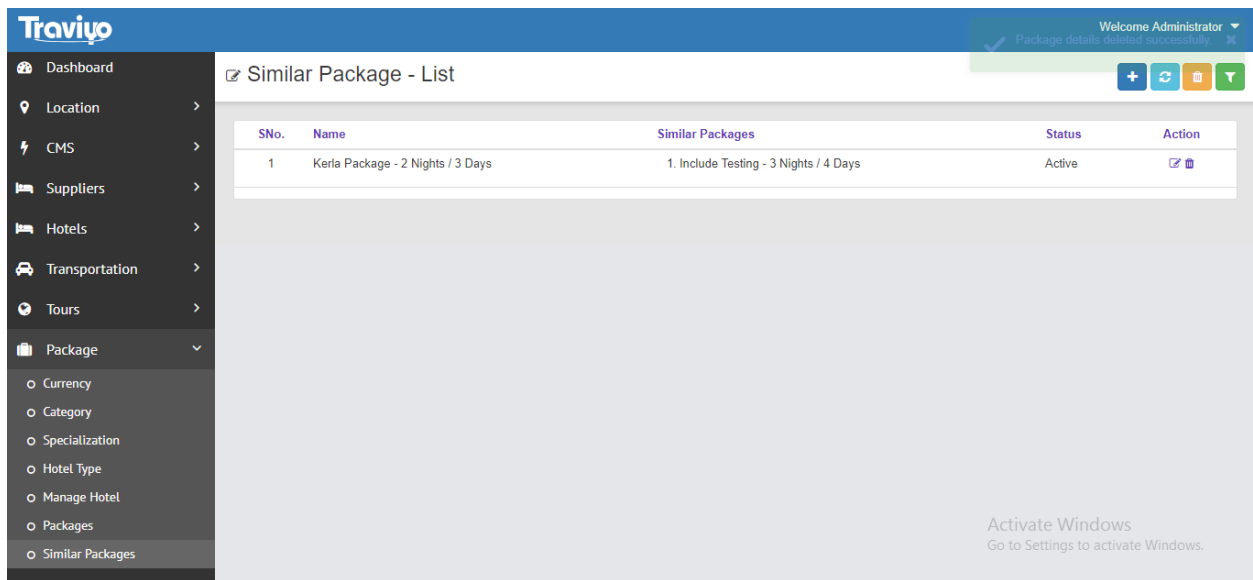


This screenshot is identical to the one above, showing the Traviyo admin dashboard with the 'Similar Package - List' page. The table contains the same two rows of package data.

After clicking on filter option below page will open on your screen fill the category name and click on filter.

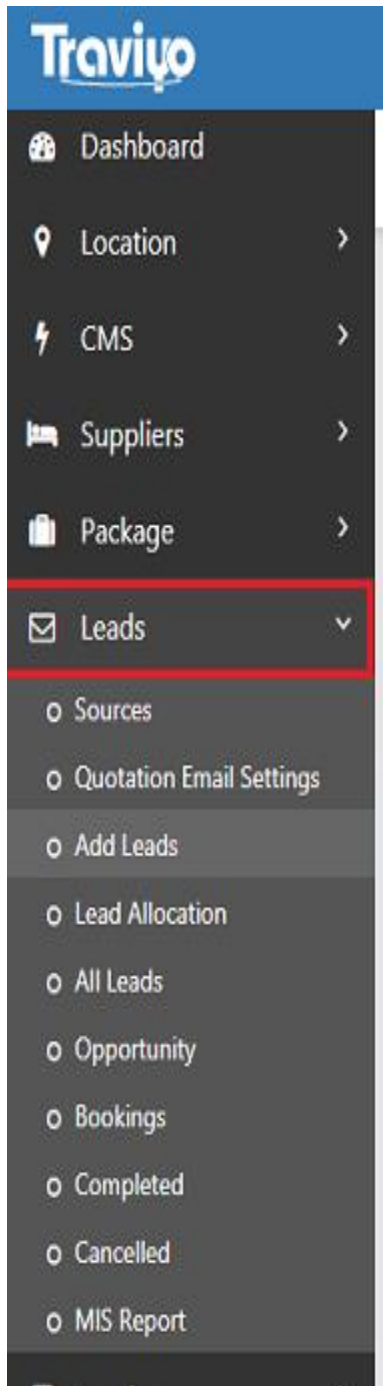


Here you can search your package for what you are looking for, as shown on the picture below.



2.2.3 Lead

From lead module we can manage lead section. It Contains nine sub modules which help in add, edit and manage flow of lead. Explanation of all the sub modules are as under which help in understanding the work of lead module.



Sub module of lead are:-

- a. Source:- From this sub module we can add the source which defines from where the lead came.
- b. Add Lead:- Admin can add lead from backend if require.
- c. Lead allocation:- In Lead allocate admin can allocate lead to the member.
- d. All Lead:- All lead is display on the screen if lead requires any edition it can be performed by this sub module and forward lead to the opportunity list.
- e. Opportunity:- In opportunity section admin can send mail to the customer, Select itinerary, finalize quotation and move lead to the Booking sub module.
- f. Booking:- In booking section admin can manage payment ,calculate profit and loss etc.
- g. Completed:- Lead which is completed will be display in this section.
- h. Cancelled:- Its contain all the record of the cancel list.
- i. MIS report:- Admin can examine the lead by filtering the stage ,status and also in other parameter. Which help in development of business.

Brief explanation of sub module are as follows:-

2.2.3.1 Sources

In source section we can manage (Add , Edit and delete) source where lead belongs. Some of the source list are sulekha, justdial etc.

The screenshot displays the Traviyo admin interface. On the left is a sidebar menu with options: Dashboard, Location, CMS, Suppliers, Hotels, Transportation, Tours, Package, Leads, Sources (highlighted with a red box), Add Leads, Lead Allocation, All Leads, Opportunity, Bookings, Completed, Cancelled, and MIS Report. The main content area is titled 'Source - List' and contains a table with the following data:

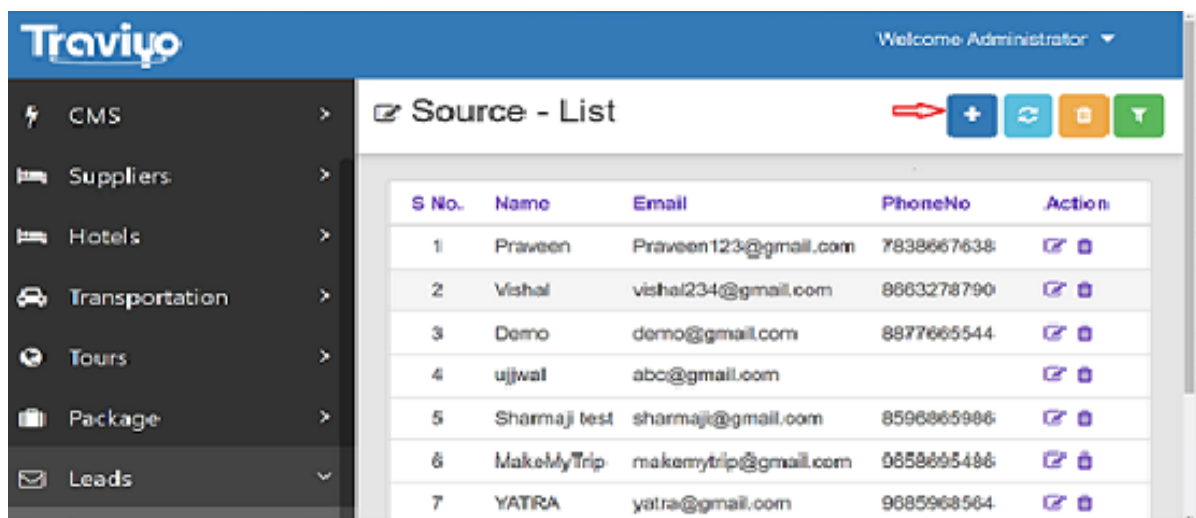
S No.	Name	Email	PhoneNo	Action
1	Praveen	Praveen123@gmail.com	7838007038	Edit Delete
2	Vishal	vishal234@gmail.com	8863278799	Edit Delete
3	Demo	demo@gmail.com	8877965544	Edit Delete
4	ujwal	abc@gmail.com		Edit Delete
5	Sharmaji test	sharmaji@gmail.com	8506065906	Edit Delete
6	MakeMyTrip	makemytrip@gmail.com	9658995486	Edit Delete
7	YATRA	yatra@gmail.com	9685968564	Edit Delete
8	Dehidarshan	dehidarshan@gmail.com	9685968564	Edit Delete
9	Trivago	Trivago@gmail.com	9685968564	Edit Delete

At the bottom of the page, there is a URL: <http://localhost:3000/newLead/Create>.

By click on the source sub module grid is display on the screen which contain source list and title menu. From source list admin can edit and delete source as be requirement. And from title menu of source list admin can add source , reset source list, reload deleted source list and filter source list.

Step for add source:-

1. Click on the Add icon from title menu.



2. After click on the add icon form display on the screen from where admin can add source by filling form.

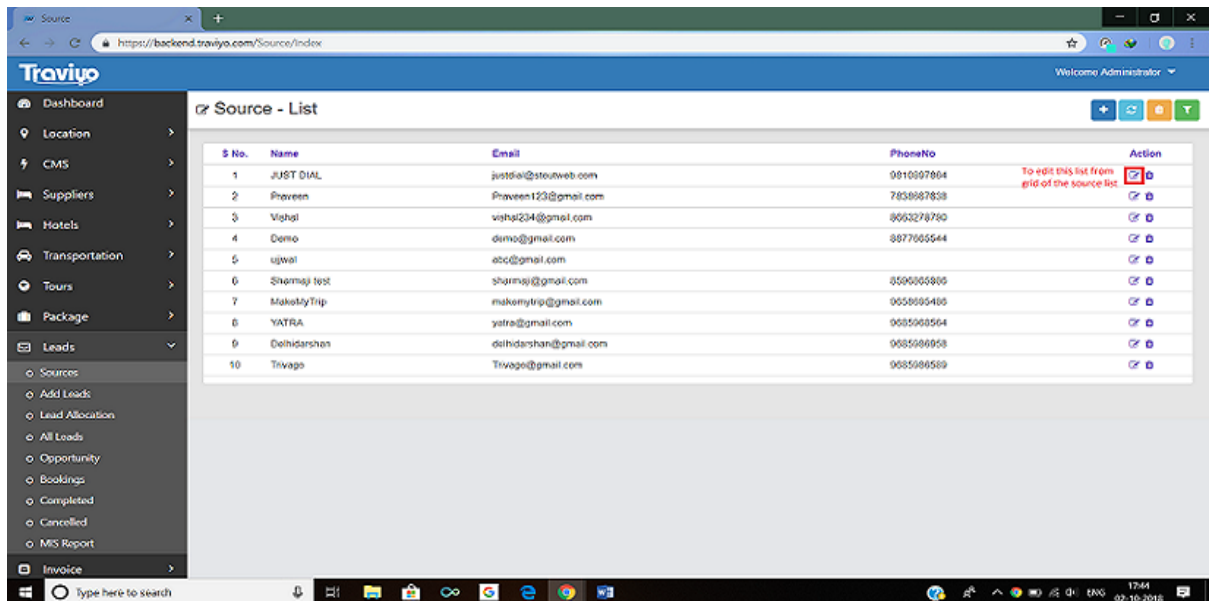
The screenshot shows the same Traviyo interface, but with the 'List Source' form open. The sidebar menu is expanded to show 'Sources' and its sub-items: Add Leads, Lead Allocation, All Leads, and Opportunity. The form has the following fields:

- Name: JUST DIAL
- Email: justdial@stoutweb.com
- Contact No.: 9810897864
- AddressLine1: admin@justdial.com
- AddressLine2: (empty)
- Country: India
- State: Delhi
- City: Delhi
- Pin Code: 110002

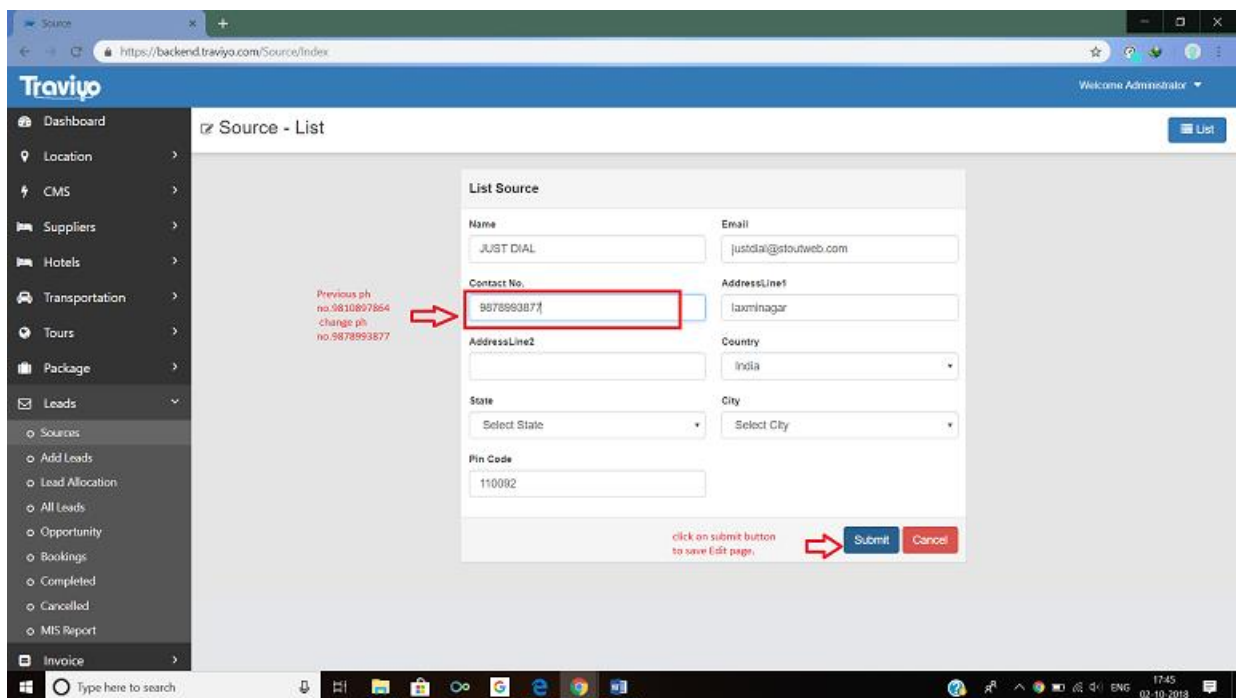
At the bottom right of the form are 'Submit' and 'Cancel' buttons.

Step for Edit source:-

1. Select the Edit option of the Particular list from source list grid .

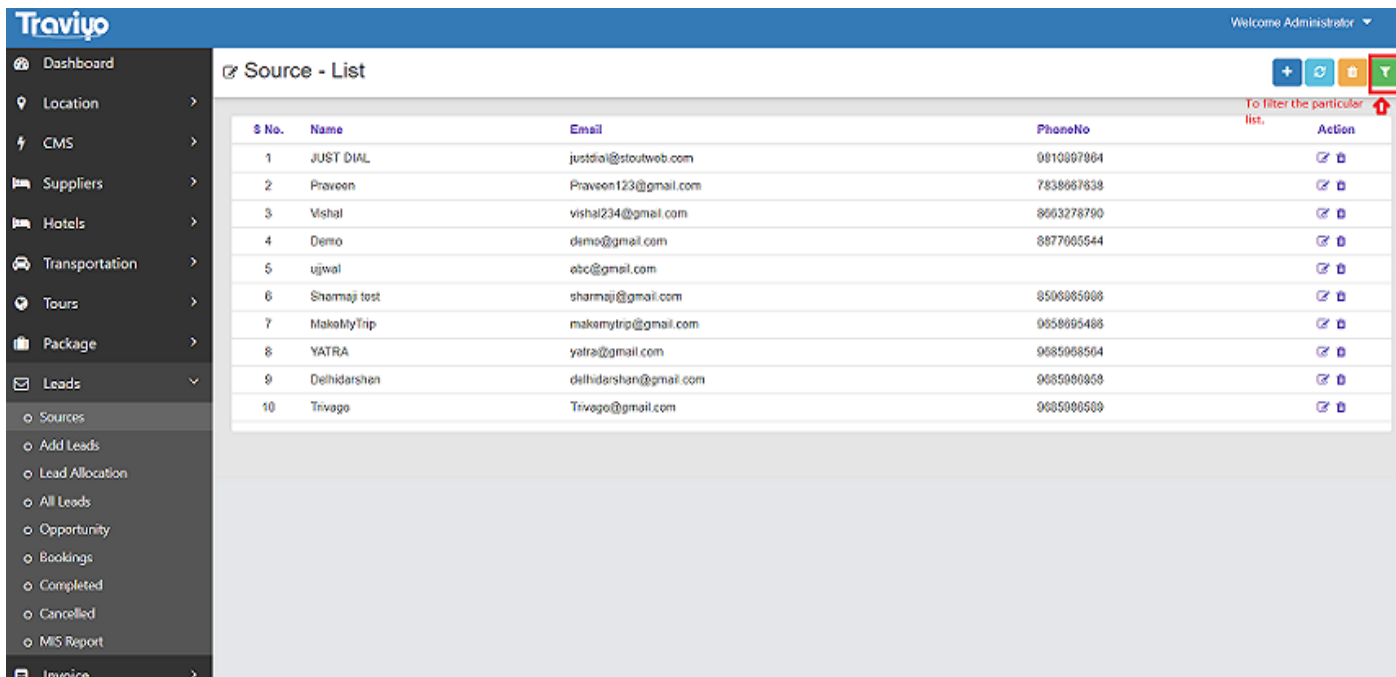


2. After edit the previous data click on the save button to save change list of the source.























Steps for Filter source:-

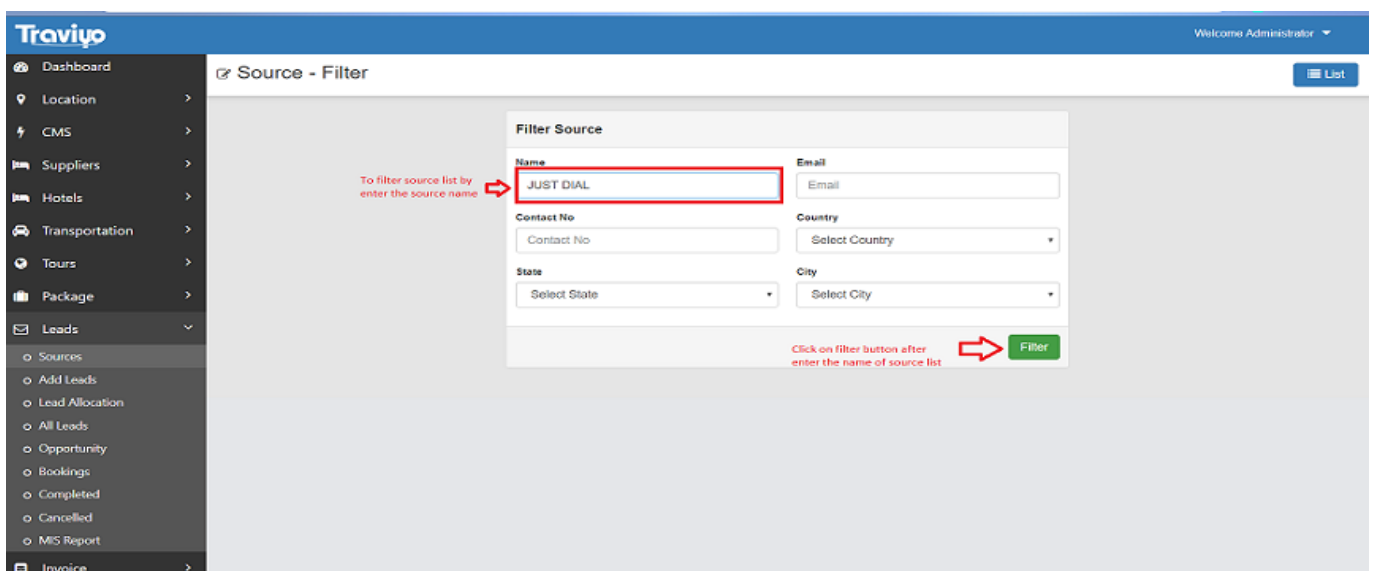
1. To search particular source list from multiple source list of the grid click on filter icon .



The screenshot shows the Traviyo dashboard with the 'Source - List' page. A table lists 10 sources with columns for S No., Name, Email, PhoneNo, and Action. A red box highlights the filter icon (a funnel) in the top right corner of the table. A red arrow points to the filter icon with the text 'To filter the particular list.'.

S No.	Name	Email	PhoneNo	Action
1	JUST DIAL	justdial@stoutweb.com	9810897884	 
2	Praveen	Praveen123@gmail.com	7838667838	 
3	Vishal	vishal234@gmail.com	8663278790	 
4	Demo	demo@gmail.com	8877005544	 
5	ujwal	abc@gmail.com		 
6	Shemaji test	shemaji@gmail.com	850085008	 
7	MakeMyTrip	makemytrip@gmail.com	955885486	 
8	YATRA	yatra@gmail.com	908508504	 
9	Delhidarshan	delhidarshan@gmail.com	908508080	 
10	Trivago	Trivago@gmail.com	908508080	 

2. By enter any of the columns of the filter form and click on filter option in the response of that particular source list will display on the screen.



The screenshot shows the Traviyo dashboard with the 'Source - Filter' page. A filter form is displayed with fields for Name, Email, Contact No, Country, State, and City. A red box highlights the 'Name' field, which contains 'JUST DIAL'. A red arrow points to the 'Name' field with the text 'To filter source list by enter the source name'. Another red arrow points to the 'Filter' button with the text 'Click on filter button after enter the name of source list'.

Filter Source

Name: Email:

Contact No: Country:

State: City:

2.2.3.2 ADD LEAD

From Add Lead sub module admin can add lead from backend. Admin can add lead in backend by two ways:-

- Multiple lead to be add by upload excel sheet.
- Single lead add by insert data in column of the form which is display by click on the add lead sub module from side menu.

Steps for create single list:-

- Enter all the column of the form as per data required.
- After fill all column click on Submit button.

The screenshot shows the 'New Lead - Create' form in the Traviyo backend. The form is titled 'New Lead - Create' and has a 'Submit' button at the top right. The form is divided into several sections:

- CONTACT DETAILS:** Fields for First Name (Vishal), Phone (0878007867), Email (vishal@stoutweb.com), and Budget (10000).
- LEAD SOURCE:** A dropdown menu with 'JUST DIAL' selected.
- NUMBER OF PASSENGERS:** Fields for Adults (2), No. of Children (Between 2-5 Yrs) (0), No. of Children (Between 5-12 Yrs) (0), and Infant (Below 2 YRS) (1).
- REQUIRMENT:** A text area with '5 Star hotel' entered.
- SERVICE:** A dropdown menu with 'HOTEL' selected.

A red arrow points to the 'Submit' button at the bottom right, with a note: 'After filling all required column click on the submit button to create lead.'

Steps for enter multiple lead by upload excel sheet:-

- Click on download option to download sample file of the excel.
- After filling the excel sheet upload that sheet by click on choose file from title menu.

3. After that click on the import lead to save all lead .

The screenshot shows the 'New Lead - Create' form in the Traviyo application. The form is divided into several sections: CONTACT DETAILS, LEAD SOURCE, NUMBER OF PASSENGERS, REQUIREMENT, and SERVICE. Annotations with red arrows and text provide instructions: '1. Download excel sample' points to the 'Download Sample File' button; '2. click on choose file to upload excel sheet' points to the 'Choose File' button; and '3. After upload file click on import lead to save lead' points to the 'Import Lead' button. The form includes input fields for First Name, Phone, Email, Budget, Source, and Service, as well as dropdown menus for Source and Service. The 'NUMBER OF PASSENGERS' section has input fields for Adults, No. of Children (Between 2-5 Yrs), No. of Children (Between 5-12 Yrs), and Infant (Below 2 Yrs). A 'Submit' button is located at the bottom right of the form.

2.2.3.3 Lead allocation

Lead allocation sub module deal with the allocate member to the particular lead .

Steps for to allocate lead are as :-

1. Click on the check box of the lead which have to allocate the member.
2. Select the member from dropdown column in the Allocation Criteria section.
3. Then click on allocate leads button to allocate member.

The screenshot shows the 'New Lead - UnAllocated Leads' page in the Traviyo system. The interface includes a sidebar with navigation options and a main content area. The main content area has a 'Select Search Criteria' section with fields for 'Select Allocated Member', 'Email Id', 'Phone Number', 'Select Service', and 'DD-MMM-YYYY'. Below this is a table of leads with columns: Ref No., First Name, Phone, Email, Allocated, Service, Status, and Action. The first row of the table is highlighted with a red box and a red arrow pointing to the 'Select Member to Allocate' dropdown in the 'Allocation Criteria' section. A red arrow also points to the 'Allocate Leads' button. The table contains 10 rows of lead data.

Ref No.	First Name	Phone	Email	Allocated	Service	Status	Action
TVY21505	Vishal	9870705545	vishal@stoutweb.com		AIR Tickets	Fresh	
TVY11057	Praveen	7638567638	Praveen123@gmail.com		AIR Tickets	Fresh	
TVY11062	Vishal	8653278790	vishal234@gmail.com		HOTEL	Fresh	
TVY11059	Shahid	9856321254	shahid@stoutweb.com		FOOD	Fresh	
TVY11057	Shahid	9856412222	shahid@stoutweb.com		FOOD	Fresh	
TVY11056	vishal	8653278790	vishal234@gmail.com		HOTEL	Fresh	
TVY11055	Vishal	8653278790	vishal234@gmail.com		AIR Tickets	Fresh	
TVY0682	Vaishali	9856312548	vaishali@stoutweb.com		AIR Tickets	Fresh	
TVY0676	Vaishali	9856312548	vaishali@stoutweb.com		AIR Tickets	Fresh	
TVY0548							

2.2.3.4 All Leads

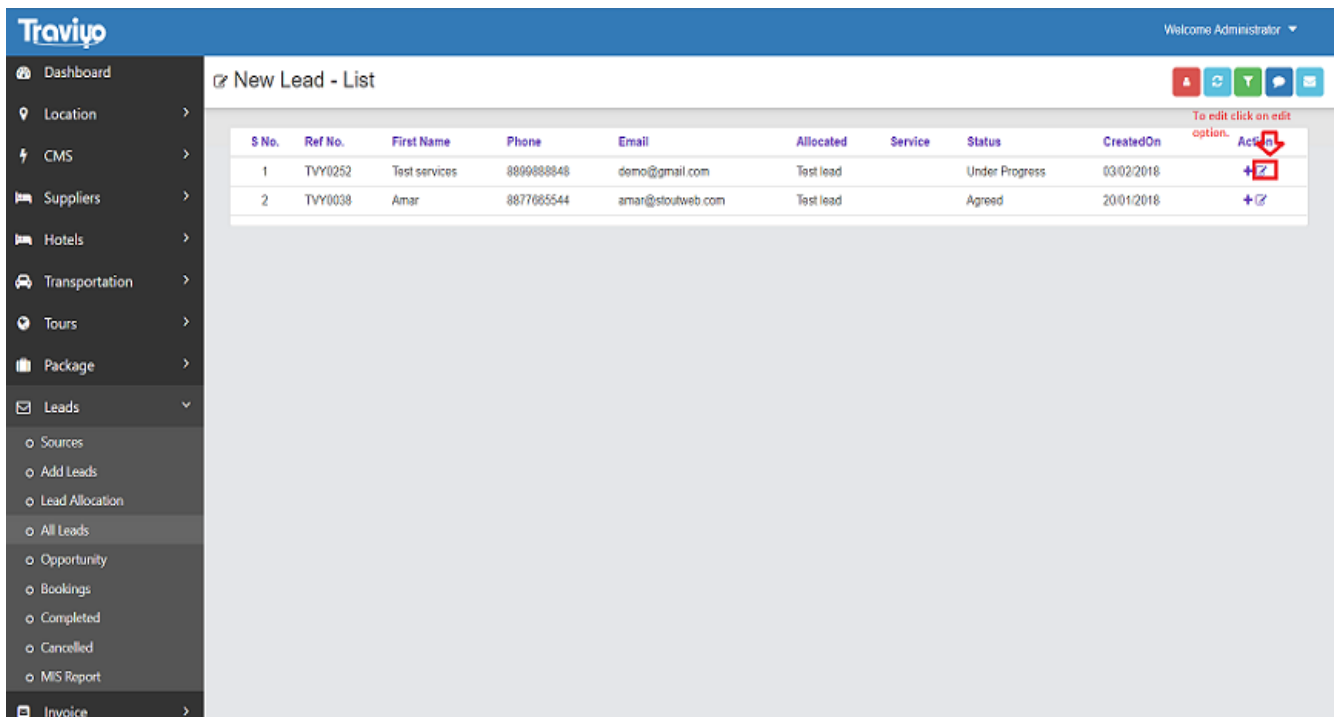
From all lead sub module admin can manage all the function of the lead such as Edit , delete , select quotation and set reminder for customer and lead admin.

Function of all lead sub module are as follow:-

1. Edit lead.
2. To Cancel lead .
3. To Send quotation .
4. To Set reminder for customer and lead admin.
5. convert to the opportunity for process further.
6. Change lead status.

Steps for Edit lead:-

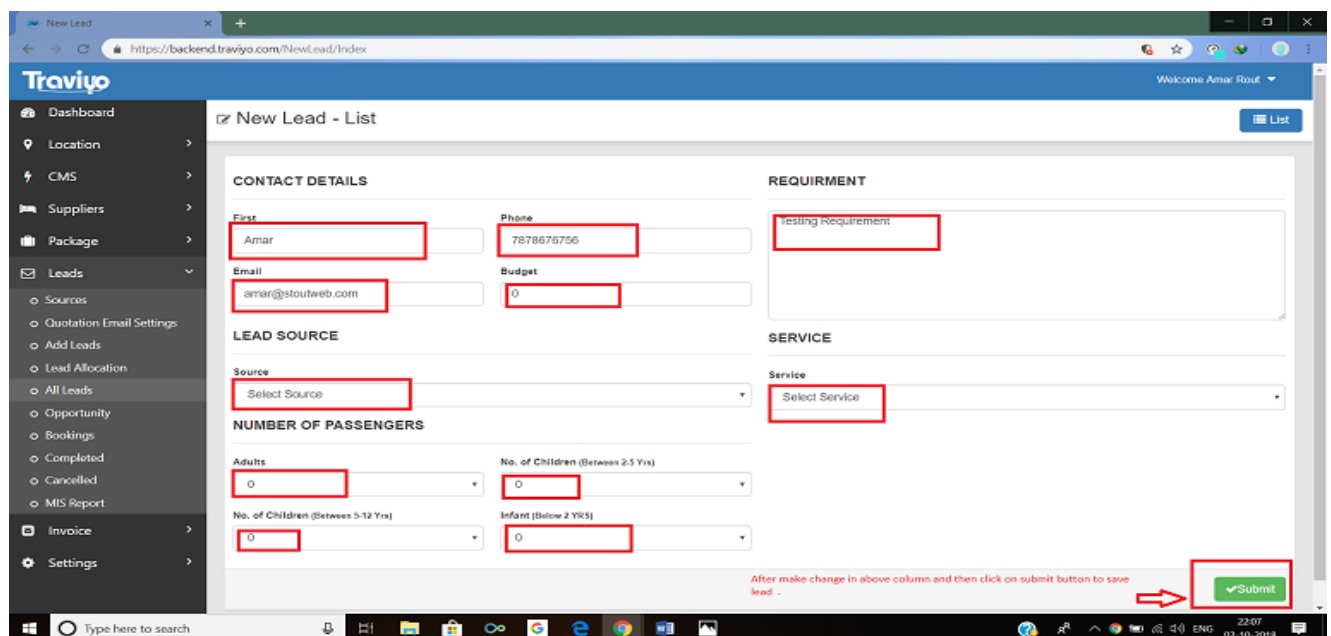
1. Click on the edit option of the particular lead .



The screenshot shows the Traviyo 'New Lead - List' page. On the left is a sidebar menu with options like Dashboard, Location, CMS, Suppliers, Hotels, Transportation, Tours, Package, Leads, and Invoice. The main area displays a table of leads. The table has columns: S No., Ref No., First Name, Phone, Email, Allocated, Service, Status, CreatedOn, and Action. The first lead (S No. 1) has the following details: Ref No. TVY0252, First Name Test services, Phone 8899888848, Email demo@gmail.com, Allocated Test lead, Status Under Progress, and CreatedOn 03/02/2018. The 'Action' column for this lead contains a '+' icon and an edit icon (a pencil inside a square), which is highlighted with a red box and an arrow pointing to it. A red text label 'To edit click on edit option.' is positioned above the edit icon.

S No.	Ref No.	First Name	Phone	Email	Allocated	Service	Status	CreatedOn	Action
1	TVY0252	Test services	8899888848	demo@gmail.com	Test lead		Under Progress	03/02/2018	+ [Edit Icon]
2	TVY0038	Amar	8877665544	aman@stoutweb.com	Test lead		Agreed	20/01/2018	+ [Edit Icon]

2. Make change as per required.



The screenshot shows the Traviyo 'New Lead - List' page with the 'Edit Lead' form. The form is divided into several sections: CONTACT DETAILS, LEAD SOURCE, NUMBER OF PASSENGERS, REQUIREMENT, and SERVICE. The input fields for First Name (Amar), Phone (7878676756), Email (aman@stoutweb.com), Budget (0), Source (Select Source), and Service (Select Service) are highlighted with red boxes. The Submit button is also highlighted with a red box and an arrow pointing to it. A red text label 'After make change in above columns and then click on submit button to save lead -' is positioned above the Submit button.

CONTACT DETAILS

First: Amar, Phone: 7878676756, Email: aman@stoutweb.com, Budget: 0

LEAD SOURCE

Source: Select Source

NUMBER OF PASSENGERS

Adults: 0, No. of Children (Between 2-5 Yrs): 0, No. of Children (Between 5-12 Yrs): 0, Infant (Below 2 YRS): 0

REQUIREMENT

Testing Requirement

SERVICE

Service: Select Service

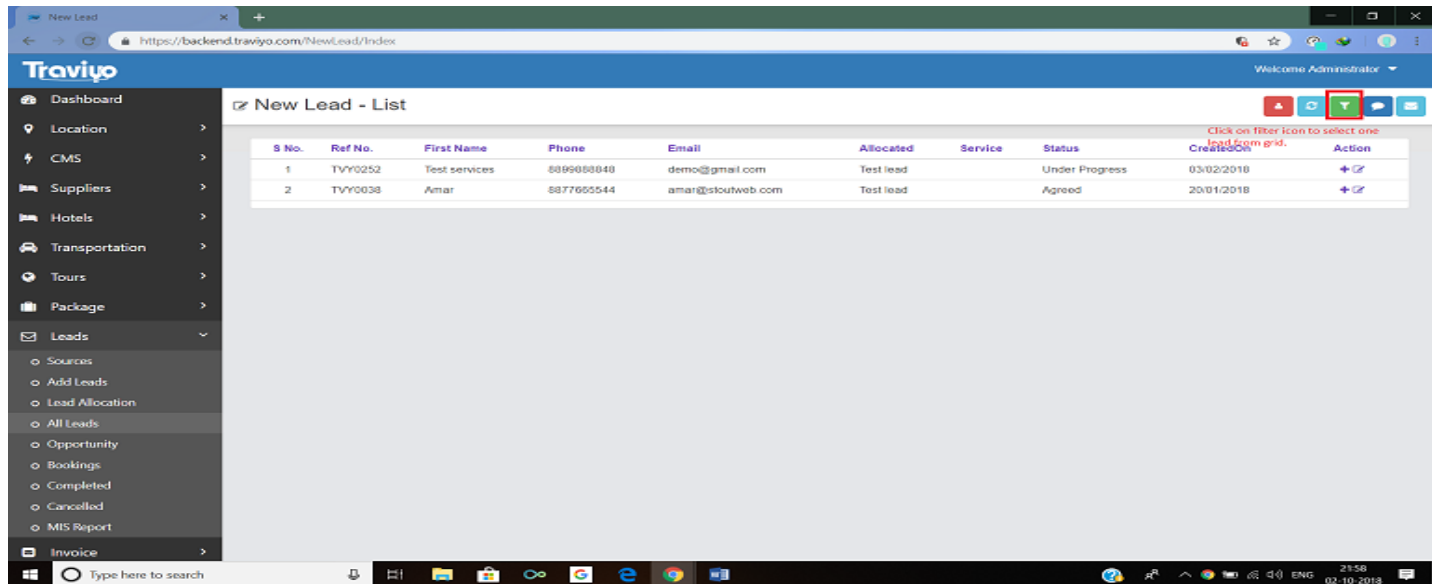
After make change in above columns and then click on submit button to save lead -

Submit

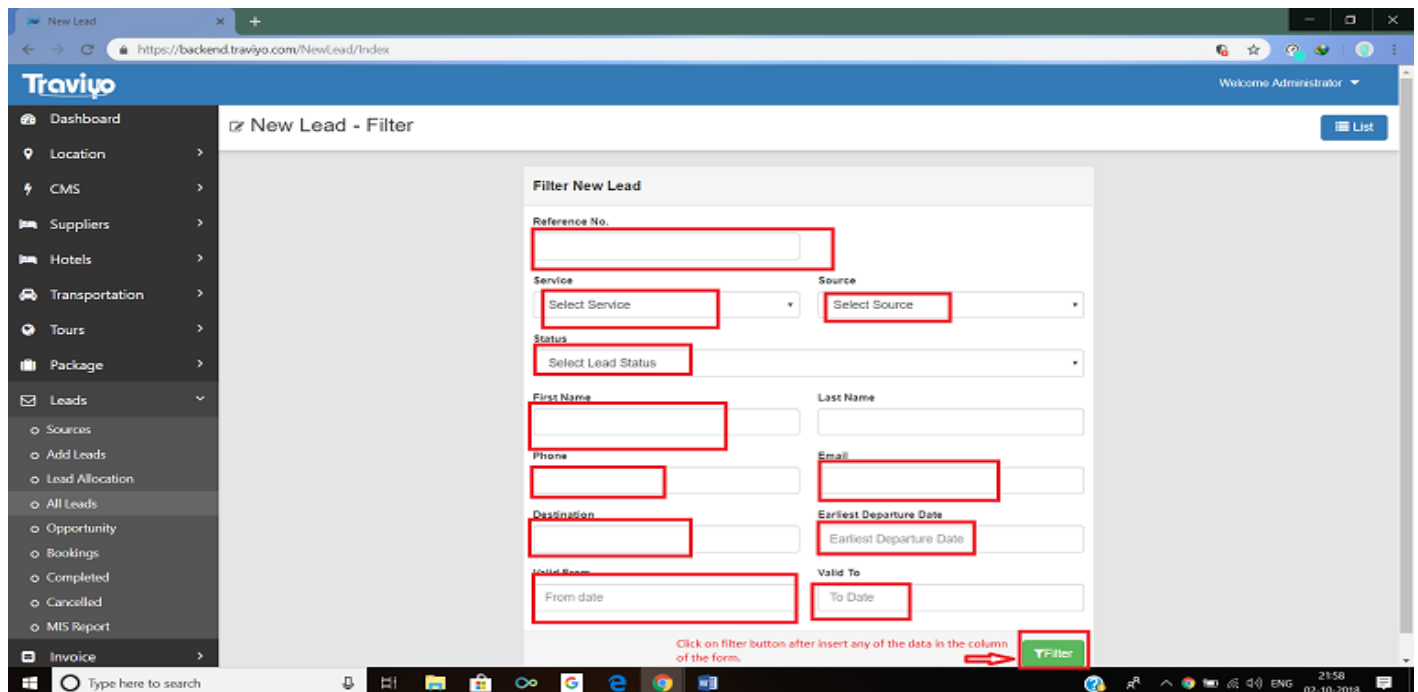
3. Tab to submit to save the changes.

Steps for filter particular lead:-

1. Click on the filter icon from the title menu.



2. Enter any of the column as per choice.









3. Tab to filter button for select the particular lead.

Steps for cancel lead:-

1. Tab to follow up icon of the lead.

New Lead - List

S No.	Ref No.	First Name	Phone	Email	Allocated	Service	Status	Created On	Action
1	TVY21594	Amar	7878676756	amar@stoutweb.com			Under Progress	02/10/2018	
2	TVY21583	prachi	8078654534	prachi@stoutweb.com	Lead Admin Manager	Air Ticket	Fresh	29/09/2018	
3	TVY21582	manish	9878675434	manish@stoutweb.com	Lead Admin Manager		Fresh	29/09/2018	
4	TVY21581	ravi	8898785755	ravi@stoutweb.com	Lead Admin Manager		Fresh	29/09/2018	
5	TVY21579	akash	9678607867	akash@stoutweb.com	Lead Admin Manager		Fresh	29/09/2018	
6	TVY21577	mini	8059785545	mini@stoutweb.com	Lead Admin Manager		Fresh	29/09/2018	

2. Tab to the cancel lead button to cancel lead.

New Lead - Follow-Ups

Lead Details

Ref No.: TVY0252
Name: Test services
Email: demo@gmail.com
Mobile: 8898888848
Requirement:
Budget: 0
Lead Status: Under Progress

Suggested Itinerary

Manage Notes

Select Title
Add a note

Manage Reminder Settings

Reminder Before
When to remind
Hours
Minute
Period
To Whom You Remind
What to Remind
Add a reminder note

Buttons: Convert To Opportunity, Cancel Lead, Suggest Itinerary

Steps for Set reminders:-

1. Tab to follow up icon of the lead.

Traviyo

Dashboard

Location

CMS

Suppliers

Package

Leads

- Sources
- Quotation Email Settings
- Add Leads
- Lead Allocation
- All Leads
- Opportunity
- Bookings
- Completed
- Cancelled
- MIS Report

Invoice

Settings

New Lead - List

S No.	Ref No.	First Name	Phone	Email	Allocated	Service	Status	CreatedOn	Action
1	TVY21594	Amar	7878676756	amar@stoutweb.com	Lead Admin Manager	Air Ticket	Under Progress	02/10/2018	
2	TVY21583	prachi	9078654534	prachi@stoutweb.com	Lead Admin Manager	Air Ticket	Fresh	29/09/2018	
3	TVY21582	manish	9878675434	manish@stoutweb.com	Lead Admin Manager	Air Ticket	Fresh	29/09/2018	
4	TVY21581	ravi	9890786755	ravi@stoutweb.com	Lead Admin Manager	Air Ticket	Fresh	29/09/2018	
5	TVY21579	akash	9878697867	akash@stoutweb.com	Lead Admin Manager	Air Ticket	Fresh	29/09/2018	
6	TVY21577	mini	9089786545	mini@stoutweb.com	Lead Admin Manager	Air Ticket	Fresh	29/09/2018	

To set reminder click on the follow up icon of the lead.

2. Go to reminder section and set reminder for particular date and time.

Traviyo

Dashboard

Location

CMS

Suppliers

Hotels

Transportation

Tours

Package

Leads

- Sources
- Add Leads
- Lead Allocation
- All Leads
- Opportunity
- Bookings
- Completed
- Cancelled
- MIS Report

Invoice

Manage Notes

Select Title

Add a note

Submit

Reset

Activated Internal Reminders

Date	Type	Reminder Note	Status	Action
------	------	---------------	--------	--------

Manage Reminder Settings

Reminder Before

To Whom You Remind

When to remind

What to Remind

Hours

Minute

Period

Add a reminder note

Submit

Cancel

To set reminder enter all column as per the choice and click on submit button to save reminder.

Activated External Reminders

Date	Type	Reminder Note	Status	Action
------	------	---------------	--------	--------

Steps for change lead status:-

1. Go to the follow up option of the particular status.

Traviyo New Lead - List

Click on follow up option to change particular status

S No.	Ref No.	First Name	Phone	Email	Allocated	Service	Status	Created On	Action
1	TVY21594	Amar	7878676756	amar@stoutweb.com			Under Progress	02/10/2018	
2	TVY21583	prachi	9878654534	prachi@stoutweb.com	Lead Admin Manager	Air Ticket	Fresh	29/09/2018	+
3	TVY21582	manish	9878675434	manish@stoutweb.com	Lead Admin Manager		Fresh	29/09/2018	+
4	TVY21581	ravi	9890786755	ravi@stoutweb.com	Lead Admin Manager		Fresh	29/09/2018	+
5	TVY21579	akash	9878097867	akash@stoutweb.com	Lead Admin Manager		Fresh	29/09/2018	+
6	TVY21577	mini	9089786545	mini@stoutweb.com	Lead Admin Manager		Fresh	29/09/2018	+

2. Then change status by select the dropdown column.

Traviyo New Lead - Follow-Ups

Convert to Opportunity Cancel Lead

Lead Details

Ref No.: TVY0252
Name: Test services
Email: demo@gmail.com
Mobile: 8899886848
Requirement:
Budget: 0
Lead Status: Under Progress

Suggested Itinerary

Manage Notes

Manage Reminder Settings

Reminder Before: To Whom You Remind: When to remind: What to Remind: Hours: Minute: Period: Add a reminder note

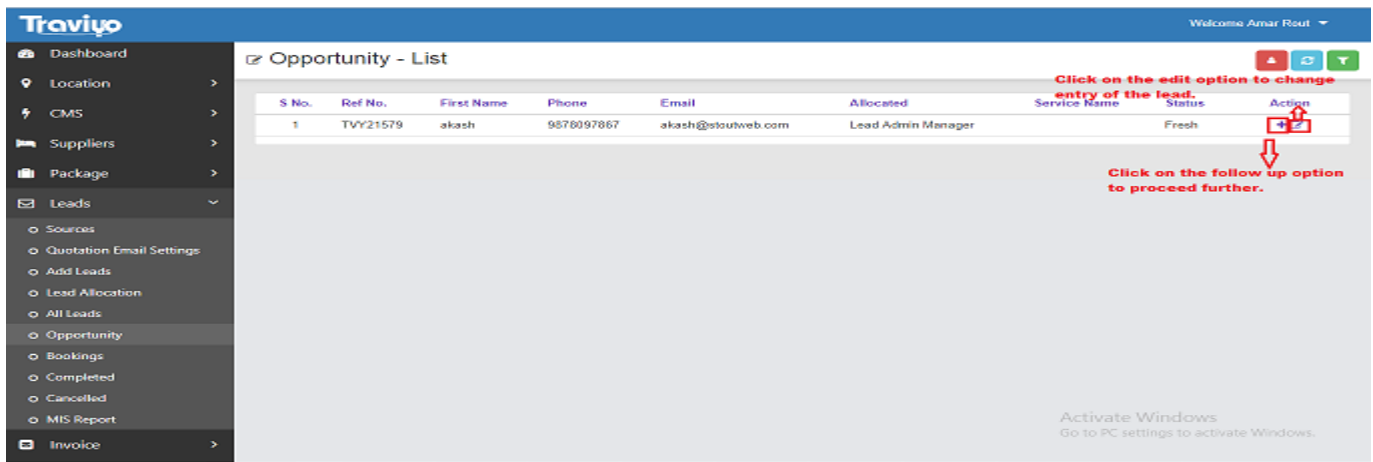
Click on edit option to change the status of lead

2.2.3.5 Opportunity

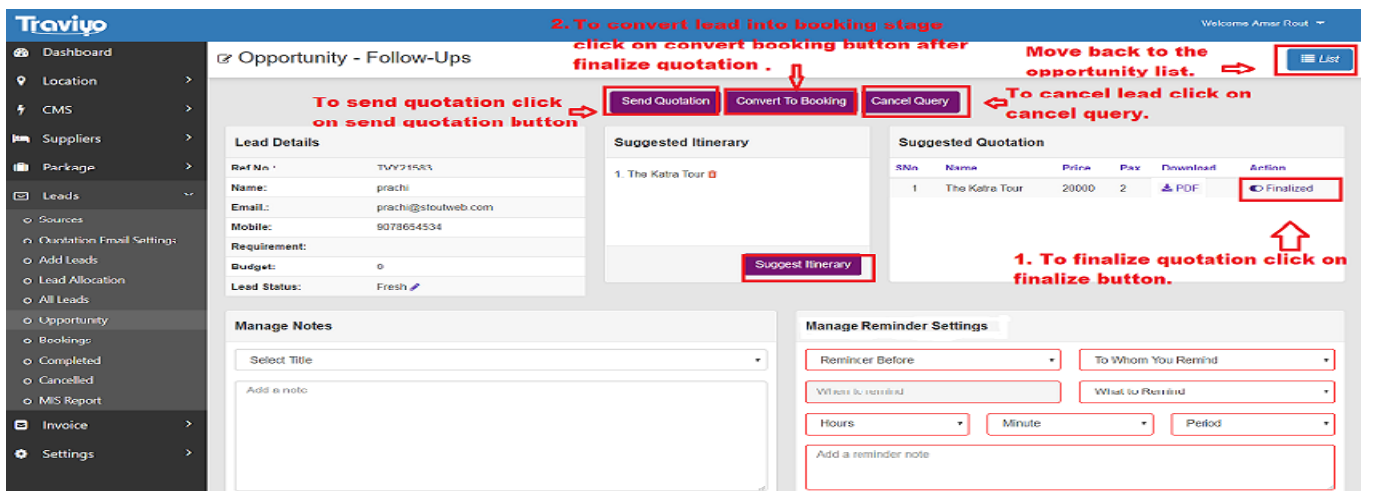
Moving forward to opportunity submodule admin can change lead to the booking after finalize quotation . In this sub module admin can manage note , finalize quotation, cancel query, suggest itinerary , set reminder and edit lead .

Steps for convert lead into booking :-

1. Tab on the follow up option in the grid of opportunity.



2. After click on follow up icon finalize the package in the suggested quotation section.
3. After finalize package tab to the convert into booking button for convert lead into booking status for further process.



2.2.3.6 BOOKING

From booking sub module we can manage scheduled payment, calculate profit and loss, convert into complete after all payment and cancel query.

Function of booking module are as follow:-

1. Manage all payment.
2. Cancel query(lead).
3. Calculate loss and profit of that particular lead.
4. After all payment from customer and after finalize quotation lead move to the complete submodule.

2.2.3.6.1 Manage suppliers and customer Payment

From booking sub module we can manage the payment of the lead and suppliers. We can send payment reminder to the customer and admin. And help to maintain all record of payment.

Steps for schedule payment:-

1. Tab to follow up option from booking lead list.

Traviyo

Booking - List

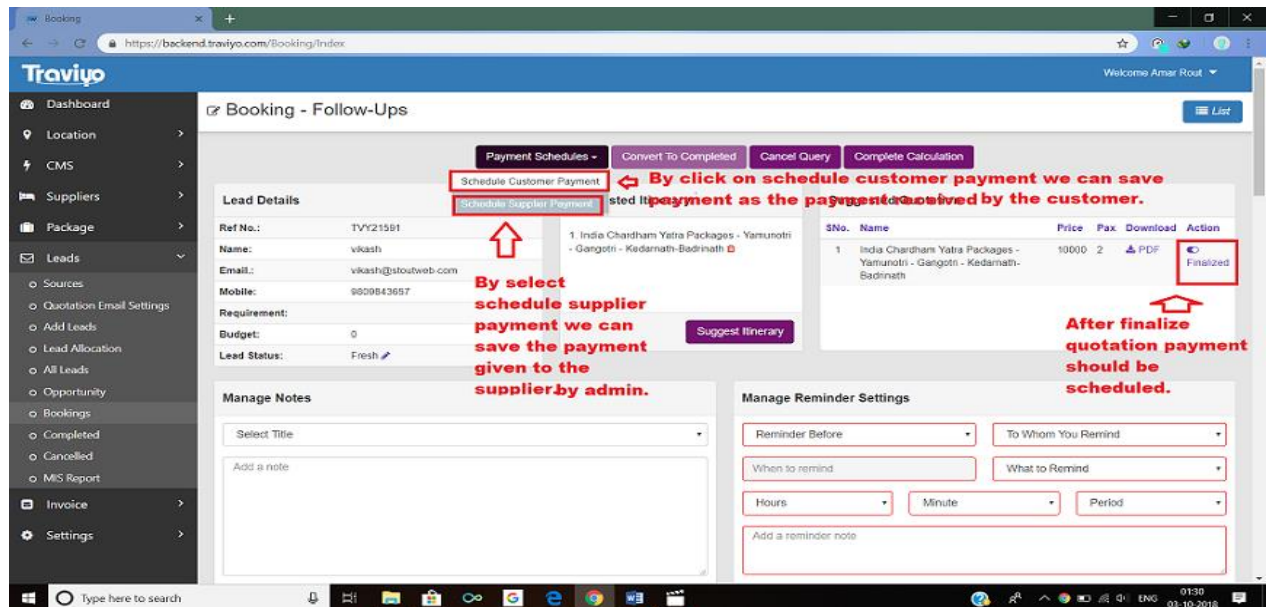
This icon help in filter lead from grid of booking list.

By click on follow up option of the particular lead Booking - Follow Ups page display which contain feature for further operation of lead

S No.	Ref No.	First Name	Phone	Email	Allocated	Package Name	Status	Action
1	TVY0257	Kumar	8765434567	amar@stoutweb.com	member2		Under Progress	+
2	TVY0254	Testing	94959595	demo@gmail.com	Test lead		Fresh	+
3	TVY0253	Testing service	999495959	demo@gmail.com	Test lead		Agreed	+
4	TVY0080	Kumar	8877665544	kumar@stoutweb.com	member2		Fresh	+
5	TVY0079	Vikram	7766554433	vik.sing@ssddee.com	member2		Agreed	+
6	TVY0042	Amar	9988776655	amar@stoutweb.com	member2		Under Progress	+

Activate Windows
Go to PC settings to activate Windows.

2. In the response of that page display on the screen to finalize quotation and scheduled payment for supplier and customer.



2.2.3.6.1.1 Scheduler customer payment

From the payment schedule option, the user can schedule the customer payment. Some of the function is as follows:-

1. Customer will get a reminder as per scheduled date and amount.
2. There should have an option to change the price of the package as per user requirement.
3. The user can update and delete the scheduled price list.

Steps for the add customer payment:-

1. Click on the scheduled customer payment from the drop-down option.
2. Insert the field as per requirement.
3. Check in the box to send a reminder.
4. Tab to the save button to save the customer payment.

Traviyo Welcome Amar Rout

Booking - Customer Payment Scheduler.

Manage Customer Payment Schedule

Package: Amamath Yatra
 Customer Name: ANKUR
 Email: raviranjn2764@gmail.com
 Contact No: 9878675623
 Total Price: 84462
 Balance Amount: 4462

Scheduled Date:
 Amount:
☐ Remind Customer

For change total price click on the here to change price
Click on this column to add date from calendar
Check in the box for send reminder to customer
Click on add button to save scheduled date and amount.

To go back to the follow up page click on the close button of the customer payment scheduler.

To make change click on the edit option of the particular list.
Click on the delete option to delete the list from grid.

S.No.	Scheduled Date	Amount	Remark	Remind Customer	Action
1	11-Oct-2018	80000		No	<input type="edit"/> <input type="delete"/>

Activate Windows
Go to PC settings to activate Windows.

2.2.3.6.1.1 Scheduler Supplier payment

From the payment schedule option, the user can schedule the Supplier payment. Some of the function is as follows:-

1. Suppliers will get a reminder as per scheduled date and amount.
2. There should have an option to change the price of the package as per user requirement.
3. The user can update and delete the scheduled price list.

Steps for the add supplier payment are:-

1. Click on the scheduled supplier payment from the drop-down option.
2. Insert the field as per requirement.
3. Check in the box to send a reminder to the supplier.

4. Tab to the save button to save the customer payment.

Traviyo Booking - Supplier Payment Scheduler.

Manage Supplier Payment Schedule

Package: Amamath Yatra
Total Price: 84462
Balance Amount: 84462

Select Service
Select Supplier
Scheduled Date
Amount

☐ Remind Supplier

Add Cancel

Click on the service drop down column to select service.
In this column user can service as per requirement
Click on this column to get calendar to insert date.
Click on the check box for send reminder to payment for supplier
click on cancel button to clear all field.

Click on add button to add supplier list.

S.No.	Supplier	Scheduled Date	Amount	Remark	Action
Activate Windows Go to PC settings to activate Windows.					

2.2.3.6.2 Cancel query

From booking module admin has a option to cancel lead. And that lead move to the cancelled sub module.

Steps for cancel lead.:-

1. Tab to follow up option from booking lead list.

Traviyo Booking - List

This icon help in filter lead from and of booking list.

By click on follow up option of the particular lead. Booking - Follow Ups page display which contain feature for further operation of lead.

S No.	Ref No.	First Name	Phone	Email	Allocated	Package Name	Status	Action
1	TVY0257	Kumar	8765434567	amar@stoutweb.com	member2		Under Progress	+
2	TVY0254	Testing	94995956	demo@gmail.com	Test lead		Fresh	+
3	TVY0253	Testing service	999495959	demo@gmail.com	Test lead		Agreed	+
4	TVY0090	Kumar	8877665544	kumar@stoutweb.com	member2		Fresh	+
5	TVY0079	Vikram	7766554433	vik.sing@seddee.com	member2		Agreed	+
6	TVY0042	Amar	9988776655	amar@stoutweb.com	member2		Under Progress	+

Activate Windows
Go to PC settings to activate Windows.

2. In the response of that page open which contain cancel query button. From that page admin can cancel that lead.

Traviyo Welcome Amar Rout

2. To convert lead into booking stage
 click on convert booking button after finalize quotation.

To send quotation click on send quotation button → **Send Quotation** → **Convert To Booking** → **Cancel Query** → **To cancel lead click on cancel query.**

Move back to the opportunity list. → **List**

To finalize quotation click on finalize button. → **Finalized**

Lead Details

Ref No: TVY21583
 Name: prachi
 Email: prachi@stoutweb.com
 Mobile: 9078654534
 Requirement:
 Budget: 0
 Lead Status: Fresh

Suggested Itinerary

1. The Katra Tour

Suggested Quotation

SNo	Name	Price	Pax	Download	Action
1	The Katra Tour	20000	2	PDF	Finalized

Manage Notes

Select Title
 Add a note

Manage Reminder Settings

Reminder Before
 To Whom You Remind
 When to remind
 What to Remind
 Hours
 Minute
 Period
 Add a reminder note

2.2.3.6.3 Complete calculation

Calculate the lead profit and loss. From booking module admin has a option to check the calculation of the payment between customer and supplier.

Steps for lead calculation:-

1. Tab to follow up option from booking lead list.

Traviyo This icon help in filter lead from grid of booking list. Welcome Administrator

Booking - List

By click on follow up option of the particular lead. Booking - Follow Ups page display which contain feature for further operation of lead.

S No.	Ref No.	First Name	Phone	Email	Allocated	Package Name	Status	Action
1	TVY0257	Kumar	8765434567	amar@stoutweb.com	member2		Under Progress	+
2	TVY0254	Testing	9499595	demo@gmail.com	Test lead		Fresh	+
3	TVY0253	Testing service	999495959	demo@gmail.com	Test lead		Agreed	+
4	TVY0080	Kumar	8877665544	kumar@stoutweb.com	member2		Fresh	+
5	TVY0079	Vikram	7766554433	vik.sing@ssddee.com	member2		Agreed	+
6	TVY0042	Amar	9988776655	amar@stoutweb.com	member2		Under Progress	+

Activate Windows
 Go to PC settings to activate Windows.

4. In the response of that page open with complete calculation button . From that admin can check the payment calculation perform in that lead.

Booking - Completed Calculation

Completed Calculation

Total amount of the package.

Amount of payment given to supplier.

Amount receive by customer.

This column show the loss amount. If there is any loss.

This amount show the profit amount.

Save

Total Amount	10000	Total Received Amount	8000
Total Released Amount	0	Additional Income	0
Additional Expenses	0	Additional Income Narration	Narration
Additional Expenses Narration	Narration	Loss	0
Profit	8000		

2.2.3.6.4 Convert into completed

After all the process complete lead moves into the completed sub-module. By click on convert into a completed button.

Steps:-

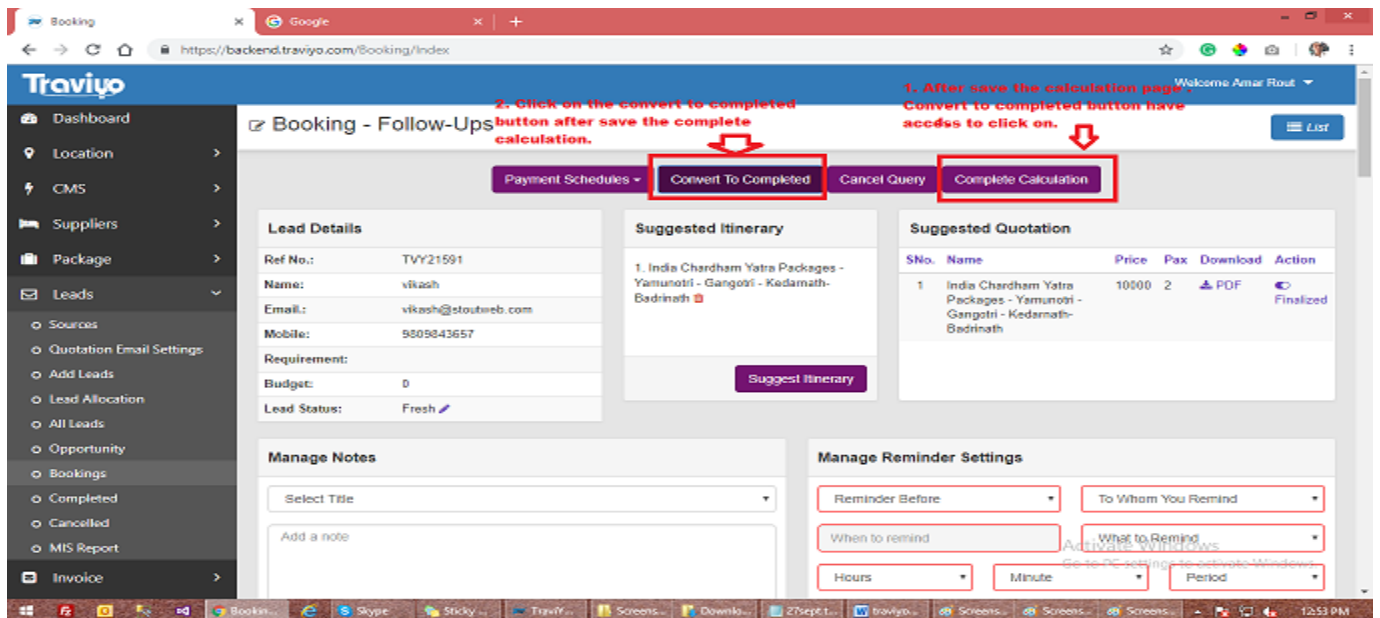
1. Tab to follow up option from booking lead list.

Booking - List

By click on follow up option of the particular lead. Booking - Follow Up page display which contain feature for further operation of lead.

S No.	Ref No.	First Name	Phone	Email	Allocated	Package Name	Status	Follow Up
1	TVY0257	Kumar	8765434567	amar@stoutweb.com	member2		Under Progress	+
2	TVY0254	Testing	9499555	demo@gmail.com	Test lead		Fresh	+
3	TVY0253	Testing service	999495959	demo@gmail.com	Test lead		Agreed	+
4	TVY0080	Kumar	8877655544	kumar@stoutweb.com	member2		Fresh	+
5	TVY0079	Vikram	7766554433	vik.sing@seddee.com	member2		Agreed	+
6	TVY0042	Amar	9998776655	amar@stoutweb.com	member2		Under Progress	+

1. In the response of that page open with convert into completed button . After click on the convert to completed lead move to the completed sub module.

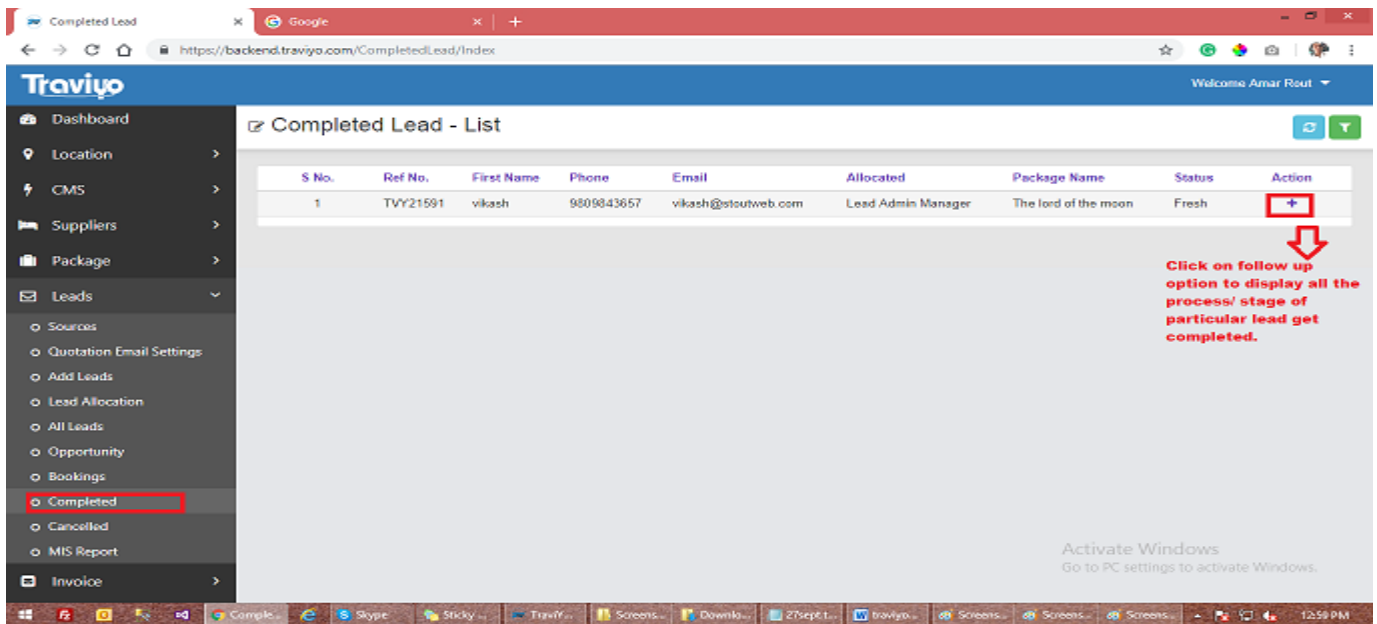


2.2.3.7 Completed

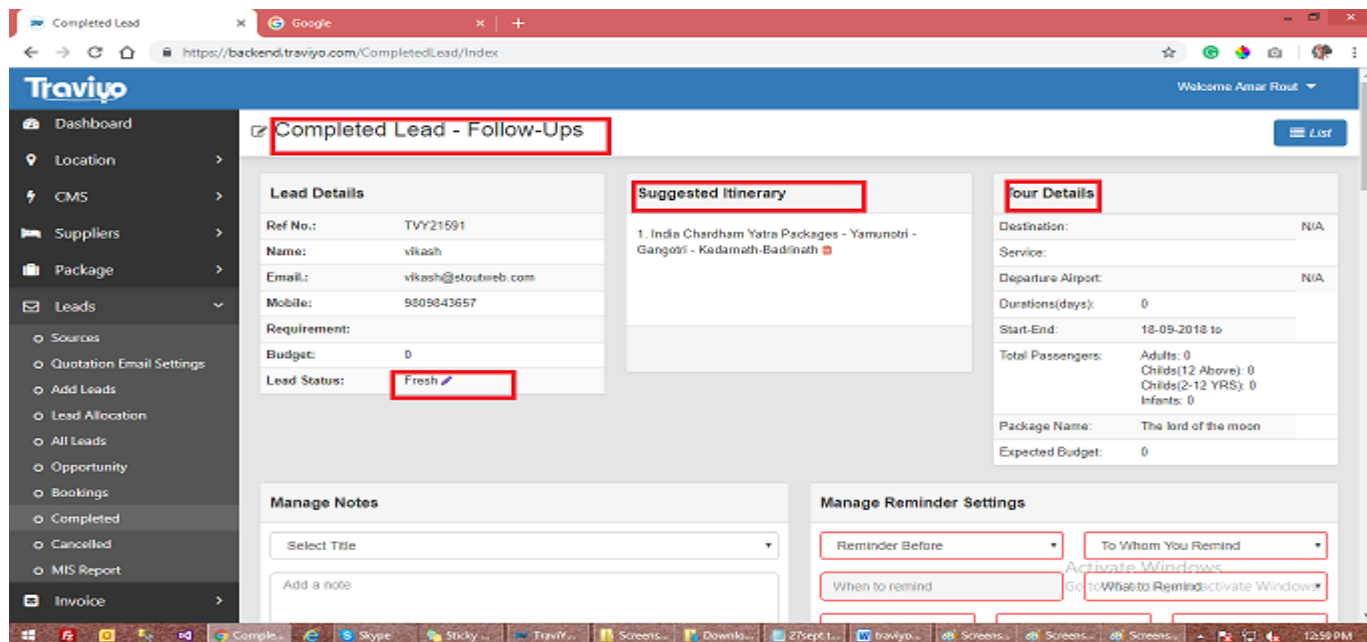
This sub module contain the list of complete lead. Once the lead comes in final stage lead save in the completed sub module.

Steps for complete lead:-

1. Tab to the completed sub module .



2. After click on follow up option all detail display on the screen.



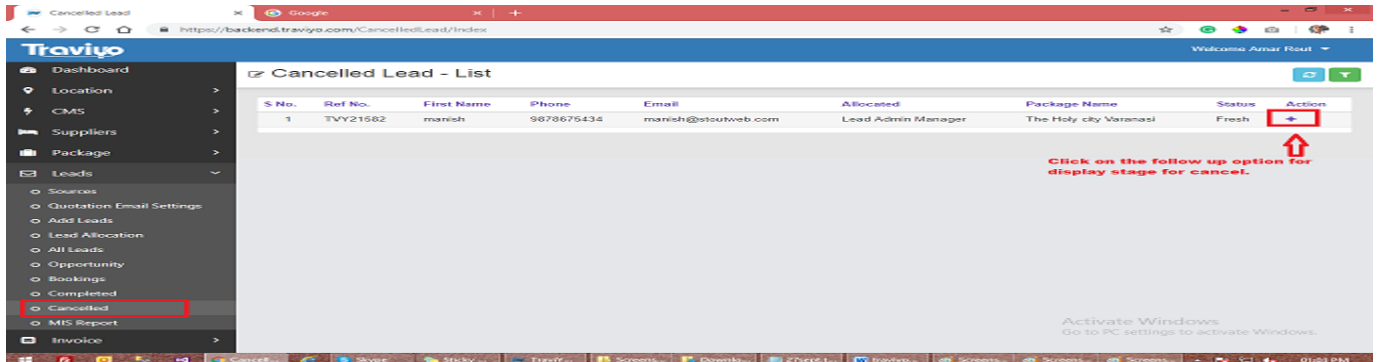
2.2.3.8 Cancelled

This sub module contain the list of all cancel lead. Once the lead is cancel it move to into this sub module . If admin want diagnosis all the cancel lead

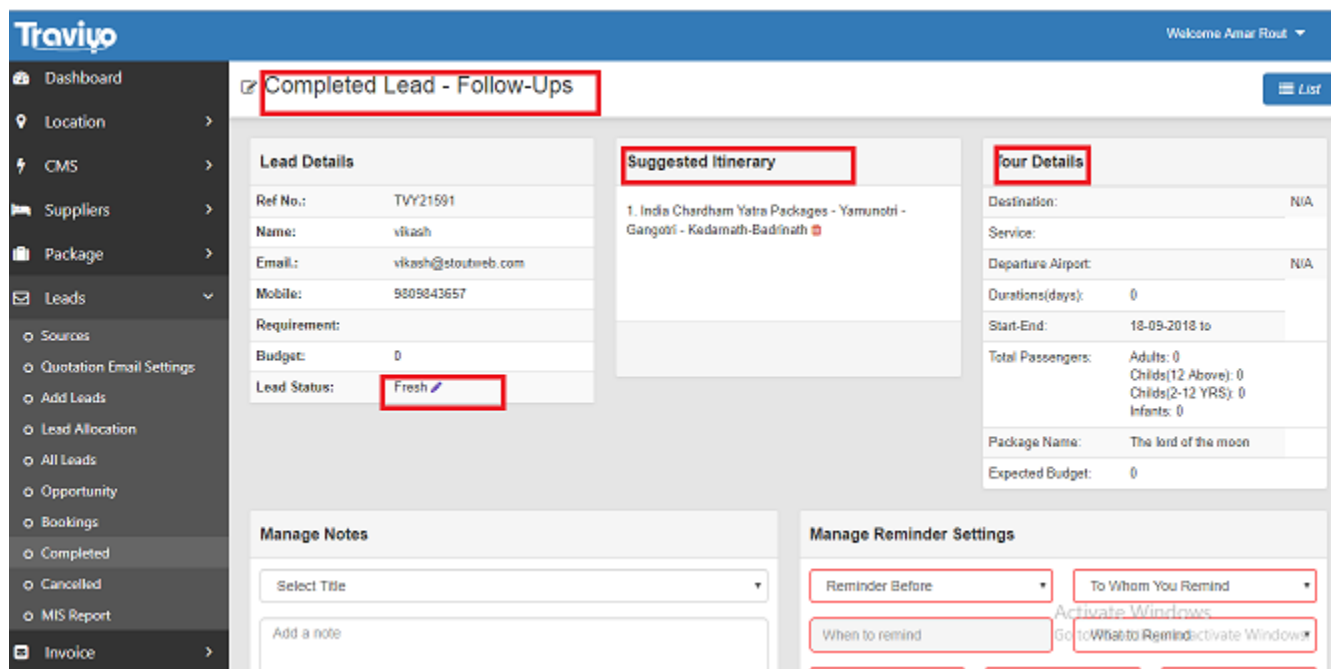
for improvement of the business they have to go on cancelled sub module after that they have click on the follows up option .

Steps for check detail of cancel list:-

1. Tab to the cancelled sub module.



2. After click on follow up option all detail of lead display on the screen.



2.2.3.9 MIS Reports

From this sub module Admin can diagnosis all report as per search accordingly.

Steps for check detail of cancel list:-

1. Tab to the MIS Reports of the sub module.
2. Search as per the requirement of status ,stage and other option

Traviyo

Welcome Amar Rout

MIS Report - Report

Filter Report Enter any of the column of the filter and click on the search option. Then lead display on the grid according to filter.

Select Stage Select Status Select Quotation Status

Select Country Select State Select City

From Date To Date Email Id Mobile Number

Click on the search option to search lead according to enter column.

Search

Name	Phone	Email	Query Stage	Query Status	Quotation Status	Action
------	-------	-------	-------------	--------------	------------------	--------

Activate Windows
Go to PC settings to activate Windows.

Traviyo

Welcome Amar Rout

1. Fresh is enter in the stage column

Filter Report

Fresh Select Status Select Quotation Status

Select Country Select State Select City

From Date To Date Email Id Mobile Number

2. Then click on the search button.

Search

3. All lead of fresh query stage is display on the grid as per require.

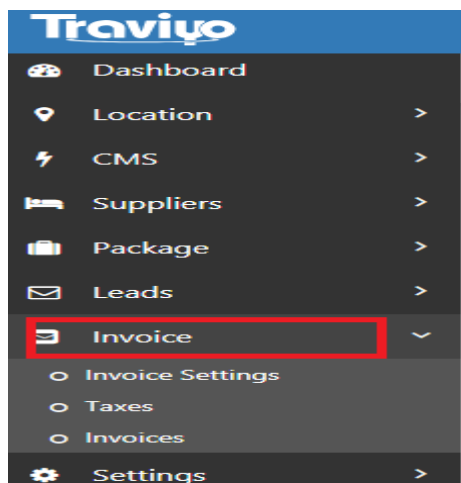
Name	Phone	Email	Query Stage	Query Status	Quotation Status	Action
Amar	7878676756	amar@stoutweb.com	Fresh	Under Progress		
Amar	7878676756	amar@stoutweb.com	Fresh	Under Progress		
Amar	7878676756	amar@stoutweb.com	Fresh	Under Progress		
Amar	7878676756	amar@stoutweb.com	Fresh	Under Progress		
Amar	7878676756	amar@stoutweb.com	Fresh	Under Progress		
Amar	7878676756	amar@stoutweb.com	Fresh	Under Progress		
Amar	7878676756	amar@stoutweb.com	Fresh	Under Progress		
Amar	7878676756	amar@stoutweb.com	Fresh	Under Progress		

Activate Windows
Go to PC settings to activate Windows.

2.2.4 Invoice

From invoice module admin can manage the setting of invoice , generate and edit invoice & manage taxes. Invoice module contain three sub module.

1. Invoice settings:- From invoice setting sub module we can manage logo, note, address and business type(individual & Organization).
2. Taxes:- Admin can manage(add ,edit and delete) taxes as require.
3. Invoices:- In invoice section admin manage invoice i.e create invoice, mark as a paid and unpaid etc.



2.2.4.1 Invoice settings

From invoice setting we can manage all the contain of invoice .

Working flow of invoice setting:-

1. Admin can change business type by click on the change button . There are two type of invoice can be generate a. individual b. Organization.
2. Admin can change logo and note of the invoice.
4. Admin can also change all the contain such as Organization Name, First Name, Last Name, Email and Address .

Traviyo Welcome Amar Rout

Business Profile - Settings

Click on change button to shift individual to organization.

Business Type: Organization CHANGE

Organization Name: Stout web Private Ltd

First Name: Amar **Last Name:** Rout


Email: amar@stoutweb.com **Website URL:** Website URL

Address (Line 1): Vaishali sec-4 **Address (Line 2):** Kushambi

Country: Honduras **State:** Select Sta **City:** Select City **PinCode:** 201201

Logo And Note From this section we can manage logo and note.

Your Invoice logo will be used in invoices, bills, estimates and receipts.

Choose File 

Default Note

Testing

After make change in the form click on the save button.

Save Reset

2.2.4.2 Taxes

From taxes sub module admin can manage(add , edit and delete) the taxes as per require.

Flow for manage taxes:-

1. Add taxes.

Steps for add taxes:-

a. Click on add icon from title menu.

Traviyo Welcome Amar Rout

Invoice Tax - List

For add tax click on add icon +

SNo.	Name	Percentage(%)	Action
1	GST	18	✎ ✖

For edit tax click in edit icon ✎

For delete tax click on the delete icon. ✖

Activate Windows
Go to PC settings to activate Windows.

b. Fill all column and click on submit button to save taxes.

Traviyo Welcome Amar Rout

Invoice Tax - Create [List](#)

Filter

Tax Name
Name

Percentage
Percentage

After enter the name and percentage click on the submit button.

[Submit](#) [Cancel](#)

Activate Windows
Go to PC settings to activate Windows.

2. Edit taxes.

Steps for Edit taxes:-

a. Click on edit icon from title menu.

Traviyo Welcome Amar Rout

Invoice Tax - List

For add tax click on add icon ➡ [+](#) [↺](#) [🗑](#) [🔍](#)

SNo.	Name	Percentage(%)	Action
1	GST	18	✎ 🗑

For edit tax click in edit icon ➡

For delete tax click on the delete icon. ⬆

Activate Windows
Go to PC settings to activate Windows.

b. After make change in column click on submit button of the form to save change.

Traviyo

Welcome Amar Rout

Invoice Tax - Edit

List

Filter

Tax Name

GST

Percentage

18

Submit Cancel

After make change click on the submit button.

Activate Windows
Go to PC settings to activate Windows.

3. Delete taxes.

Steps for delete taxes:-

a. Click on delete icon for delete taxes.

Traviyo

Welcome Amar Rout

Invoice Tax - List

For add tax click on add icon

For edit tax click in edit icon

For delete tax click on the delete icon.

SNo.	Name	Percentage(%)	Action
1	GST	18	

Activate Windows
Go to PC settings to activate Windows.

2.2.4.3 Invoices

In this sub module admin can manage invoice such as create, edit , delete and view the invoice.

Some of the flow of invoice are follows:-

1. Marks as paid and unpaid.
2. Create invoice.
3. Change the contain of invoice.
4. Edit , delete and view invoice as per require.

Steps for change status for paid and unpaid :-

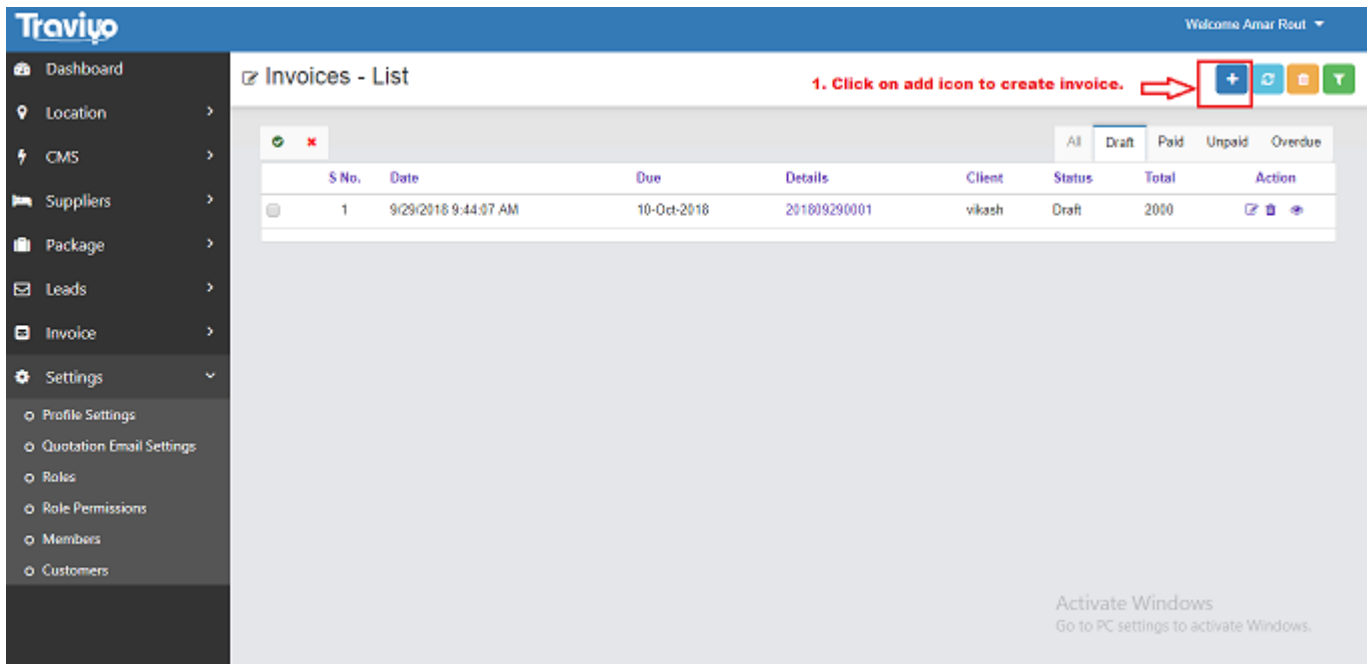
1. Check in the check box after that click on paid .Then invoice status change as paid or unpaid.

The screenshot displays the 'Traviyo' web application interface. On the left is a dark sidebar with navigation links: Dashboard, Location, CMS, Suppliers, Package, Leads, Invoice, and Settings (with sub-links for Profile Settings, Quotation Email Settings, Roles, Role Permissions, Members, and Customers). The main content area is titled 'Invoices - List' and features a status filter bar with buttons for 'All', 'Draft', 'Paid', 'Unpaid', and 'Overdue'. Below this is a table with columns: S No., Date, Due, Details, Client, Status, Total, and Action. Two invoices are listed: Invoice 1 (Status: Paid, Total: 8000) and Invoice 2 (Status: Draft, Total: 2000). Red annotations with arrows point to the checkboxes in the first column of the table, labeled '1. Check in the check box.'. Another red annotation points to the 'Paid' button in the status filter bar, labeled '2. Click on the paid icon for change status into paid.'. A third red annotation points to the 'Unpaid' button, labeled '3. Click on unpaid icon for change status from draft to unpaid.'. At the bottom right, there is a 'Activate Windows' watermark.

S No.	Date	Due	Details	Client	Status	Total	Action
1	9/29/2018 9:44:58 AM	16-Oct-2018	201809290079	vikash	Paid	8000	[Edit] [Delete] [Refresh]
2	9/29/2018 9:44:07 AM	10-Oct-2018	201809290001	vikash	Draft	2000	[Edit] [Delete] [Refresh]

Steps for Create invoice:-

a. Click on the add icon from title menu.



b. Fill all the require field. And click on save draft or send button to save invoice.

Traviyo

Welcome Amar Rout

Invoices - Create

After filling all the require field click on save draft to save invoice

By click on send button by filling all require field invoice send to the customer.

Invoice Title

Invoice No.

Description

Due Date

Currency

Select Currency

From:

To : Select Customer :

Select Customer

Sr No.	Description	Quantity	Rate {}	Amount {}	
Taxes	Select				

SubTotal :

Activate Windows
Go to PC settings to activate Windows.

Cancel

c. For view invoice click on the eye icon of particular lead from grid.




Traviyo

Welcome Amar Rout

Invoices - List

1. Click on add icon to create invoice.

For view invoice click on the eye icon.

S No.	Date	Due	Details	Client	Status	Total	Action
1	9/29/2018 9:44:07 AM	10-Oct-2018	201809290001	vikash	Draft	2000	  

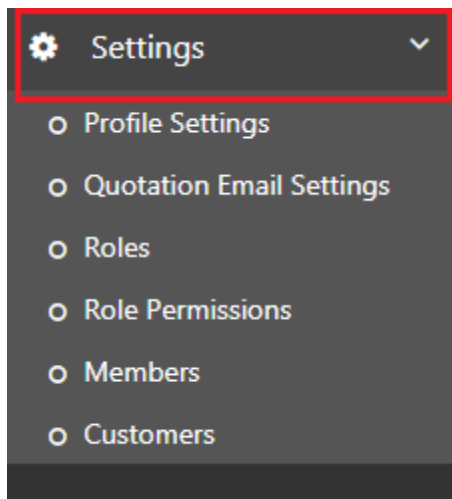
Activate Windows
Go to PC settings to activate Windows.

2.2.5 Setting

From setting module admin can make member, add role and give permission to the role. Setting module contain six sub module .

The sub module are as follow:-

1. Profile Setting : From profile setting admin Edit the field of profile as per require.
2. Quotation Email setting : From quotation Email setting admin can make change in contain of mail as per need i.e change from mail id , change email body and email signature.
3. Roles: In role sub module admin can manage (add, edit, delete) role.
4. Role permission: From role permission sub module admin give permission for role.
5. Members: Admin can manage the member from member sub module.
6. Customers: Admin can manage the customer from customer sub module.




2.2.5.1 Profile Setting

From profile setting admin can change his profile as per require.

Steps for change profile setting are as:-

1. Select setting module .
2. Tab to the profile setting sub module.
3. Click on edit option.

Sno.	Company Name	First Name	Last Name	Contact No	Address	Action
1	Demo	Amar	Rout	7878675657	Delhi	

CLICK ON THE EDIT ICON TO MAKE CHANGE IN PROFILE

4. Make a change in the require field.

5. After that click on the save button to save change profile.

Traviyo

Dashboard

Location

CMS

Suppliers

Package

Leads

Invoice

Settings

Profile Settings

Quotation Email Settings

Role

Role Permissions

Members

Customize

Related Link Header 1

Related Link Header 2

Related Link Header 3

Related Link Header 4

Related Link Header 5

Related Link Header 6

Related Link Header 7

Related Link 1

Related Link 2

Related Link 3

Related Link 4

Related Link 5

Related Link 6

Related Link 7

FOOTER CONTENT:

Content:

File Edit View Format

Click on the save button to save the changes

Save

2.2.5.2 Quotation Email Setting

From Quotation email setting admin can edit name, Email subject, from email, cc email, email signature and notes.

Steps for quotation email setting are:-

1. Click on the edit option of the profile settings module.

2. After make change click on the save button.

Traviyo

Quotation Email Settings - Edit

Quotation Email Settings

Email Name

Email Subject

From Email

CC Email

Signature

Notes

Click on the save button to save the changes

Save

2.2.5.3 Roles

In roles sub module admin can manage role .

1. Create Role.
2. Edit the register Role.
3. Delete the Role.

Steps for create Role:-

1. Select Role sub module.
2. Click on the add icon of the title menu.

Traviyo

Welcome Amar Rout

Dashboard

Location

CMS

Suppliers

Package

Leads

Invoice

Settings

- Profile Settings
- Quotation Email Settings
- Roles**
- Role Permissions
- Members
- Customers

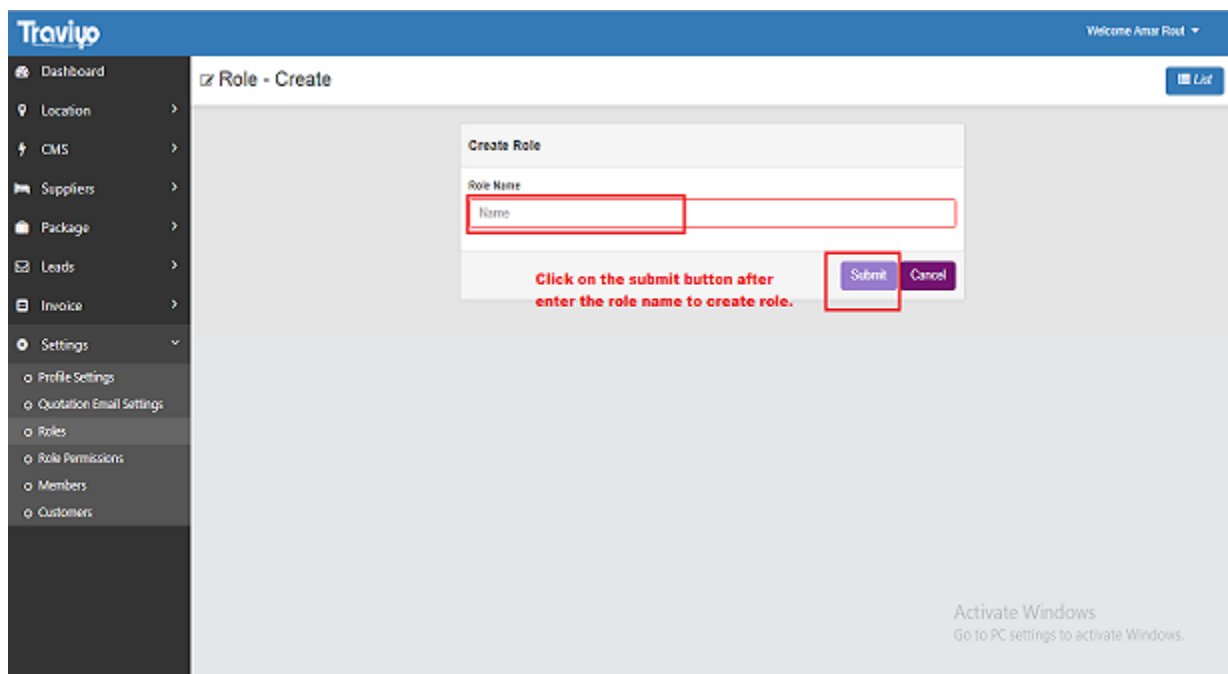
Role - List

To create role click on the add icon ➡

SNo.	Name	Status	Action
1	Manager Supplier and Invoice payment	Active	Edit Delete
2	Package Manager	Active	Edit Delete
3	Lead Admin	Active	Edit Delete

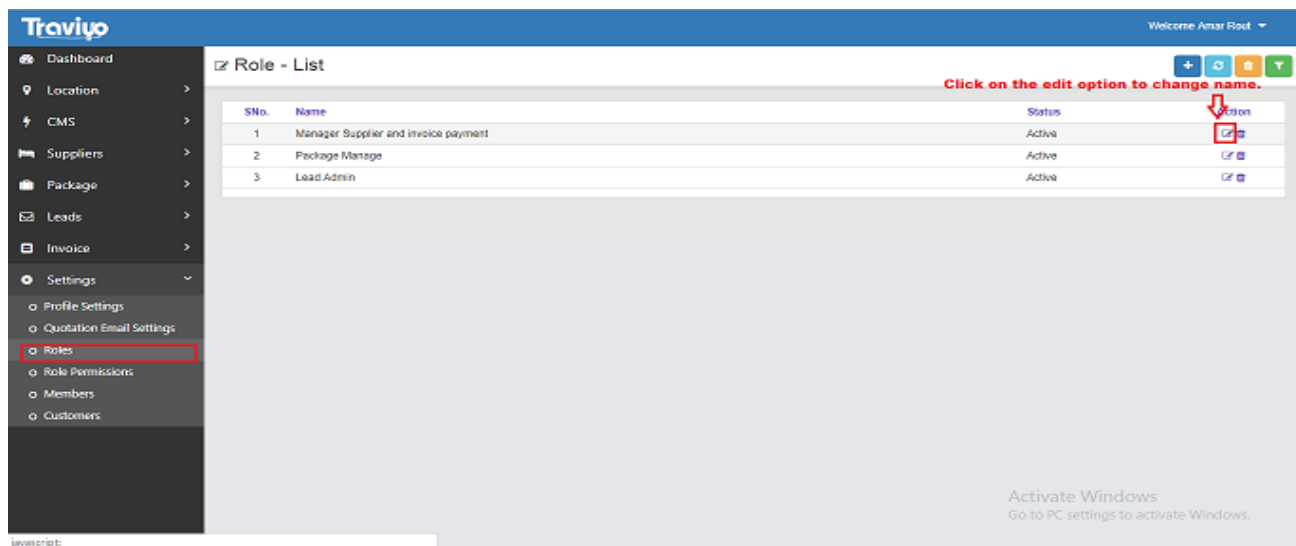
Activate Windows
Go to PC settings to activate Windows.

3. After filling all field click on submit button.

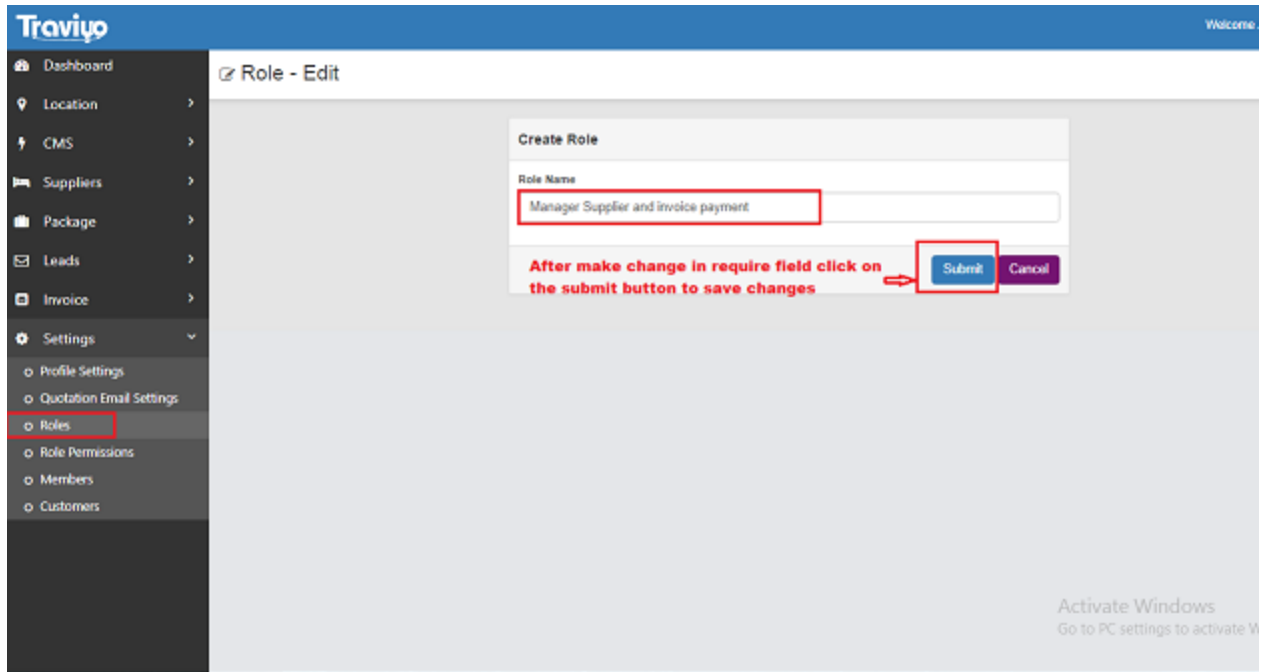


Steps for Edit Role:-

1. Select Edit option from role list.

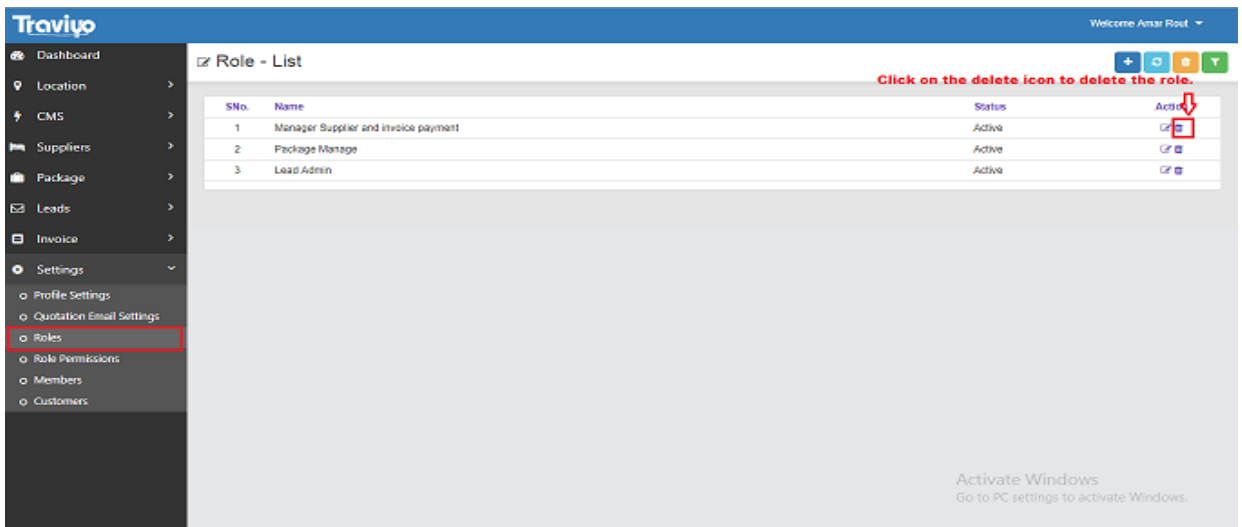


2. Click on the submit button after make change to save changes.



Steps for Delete Role:-

1. Click on the delete icon on the grid.

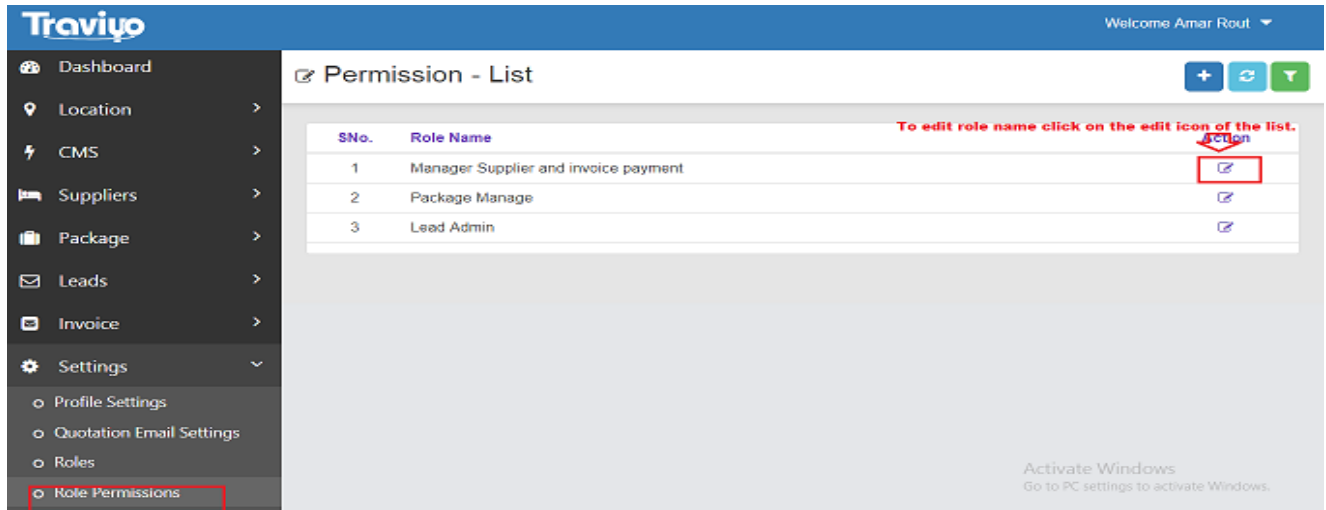


2.2.5.4 Role permission

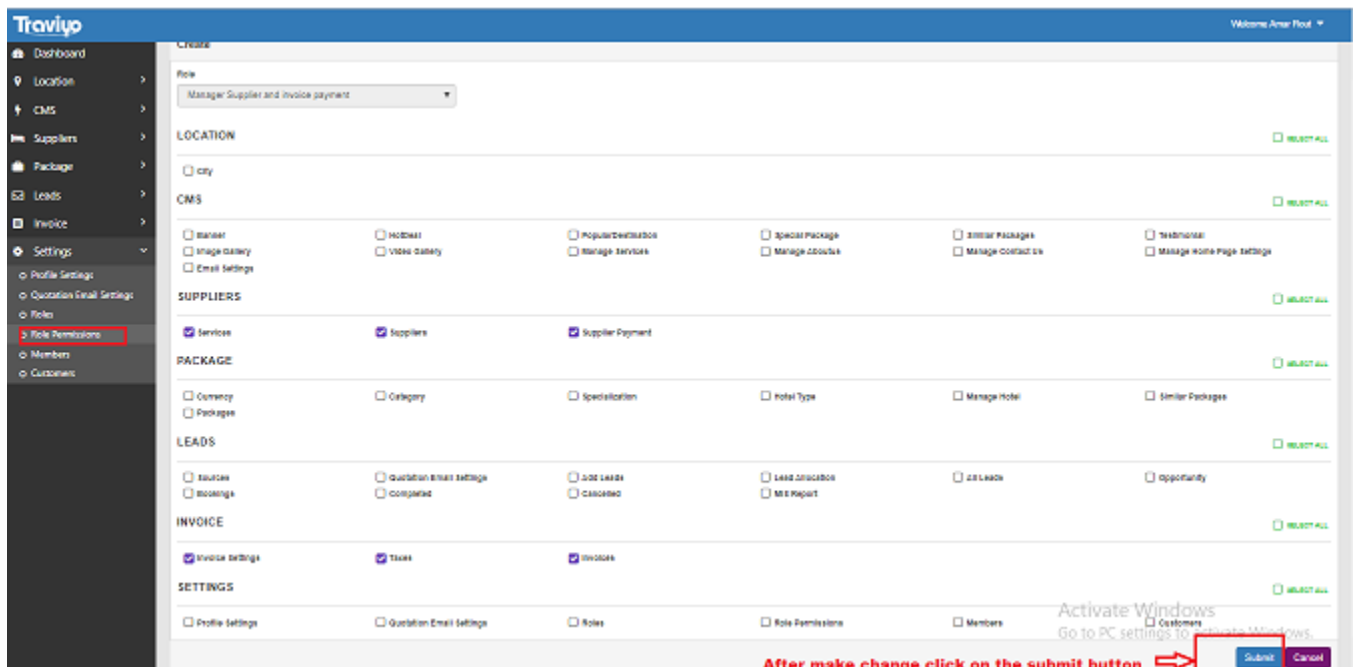
From role permission sub module admin can provide access to the particular role.

Steps for provide permission to the role:-

1. Click on the add icon from title menu.



2. Select role and check in the check box to provide permission for particular section/module.



2.2.5.5 Member

From this sub module admin can manage(add edit and delete) the member .

Work flow of the member sub module are as follow:-

1. Create member.
2. Edit the register member.
3. Delete the member.

Steps for create member:-

1. Select member sub module.
2. Click on the add icon of the title menu.

Traviyo

Welcome Amar Rout

Member - List

To add new member click on the add icon.

SNo.	Name	Email	Phone	Role	Status	Action
1	Supplier and invoice manager	payment@stoutweb.com	9878676545	Manager Supplier and invoice payment.	Active	Edit Delete
2	Package	package@stoutweb.com	9878675645	Package Manage	Active	Edit Delete
3	Lead Admin Manager	Lead@stoutweb.com	9810897809	Lead Admin	Active	Edit Delete

Activate Windows
Go to PC settings to activate Windows.

3. After filling all field click on submit button.

Traviyo Welcome Amar Rout

Member - Create [List](#)

Member Name

Role **Gender**

Phone

Email

Password

Fill all the require field then click on the submit button. [Submit](#) [Cancel](#)

Activate Windows
Go to PC settings to activate Windows.

Steps for Edit member:-

1. Select Edit option from member list of the grid.

Traviyo Welcome Amar Rout

Member - List [+](#) [-](#) [P](#) [T](#)

CLICK ON THE EDIT ICON TO MAKE A CHANGE IN THE MEMBER PROFILE.

SNo.	Name	Email	Phone	Role	Status	Action
1	Supplier and Invoice manager	payment@stoutweb.com	9878676545	Manager Supplier and Invoice payment	Active	Edit Delete
2	Package	package@stoutweb.com	9878675645	Package Manage	Active	Edit Delete
3	Lead Admin Manager	Lead@stoutweb.com	9810897809	Lead Admin	Active	Edit Delete

Activate Windows
Go to PC settings to activate Windows.

2. Click on the submit button after make change.

Traviyo

Welcome Amar Rout

Member - Edit

Member Name: Supplier and invoice manager

Role: Manager Supplier and Invoice p...

Gender: Male

Phone: 9878676545

Email: payment@stoutweb.com

Password: 123456

CLICK ON THE SUBMIT BUTTON AFTER MAKE CHANGE AS PER REQUIRE

Submit Cancel

Steps for Delete member:-

Click on the delete icon of the grid.

Traviyo

Welcome Amar Rout

Member - List

CLICK ON THE DELETE ICON TO DELETE THE MEMBER LIST

SNo.	Name	Email	Phone	Role	Status	Action
1	Supplier and invoice manager	payment@stoutweb.com	9878676545	Manager Supplier and Invoice payment	Active	
2	Package	package@stoutweb.com	9878675545	Package Manage	Active	
3	Lead Admin Manager	Lead@stoutweb.com	9810897809	Lead Admin	Active	

Activate Windows
Go to PC settings to activate Windows.

2.2.5.6 Customer

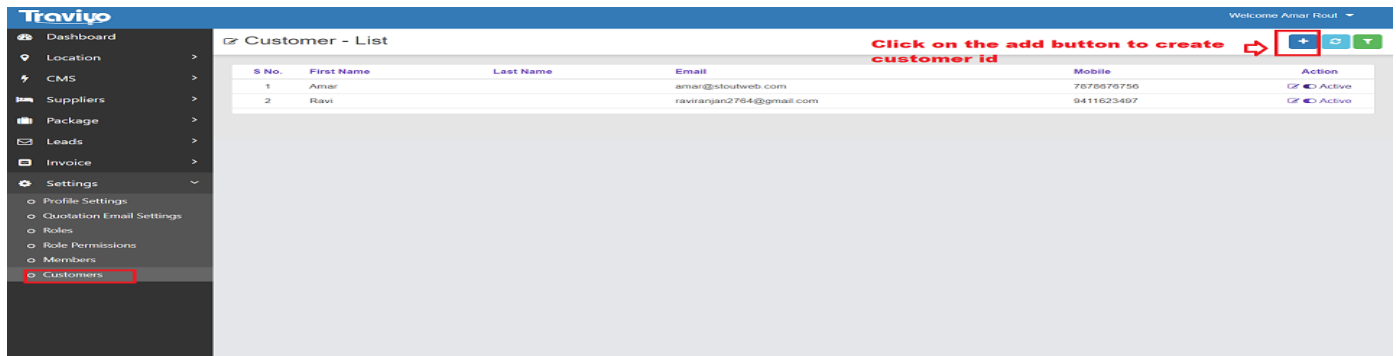
By customer sub module admin have to add , edit and delete the customer frontend login id.

Flow of the customer:-

1. Create customer id.
2. Edit the register customer id.
3. Activate and deactivate the customer id

Steps for create customer :-

1. Select customer sub module.
2. Click on the add icon of the title menu.



3. After filling all field click on submit button.

Create

Title: Select | First Name: First Name | Last Name: Last Name | Address:

DOB: DOB | Gender: Select Gender | Country: Select Country | State: Select State

Email: Email | City: Select City | Pin Code: Last Name

ISD Code: Select ISD Code | Mobile: Mobile

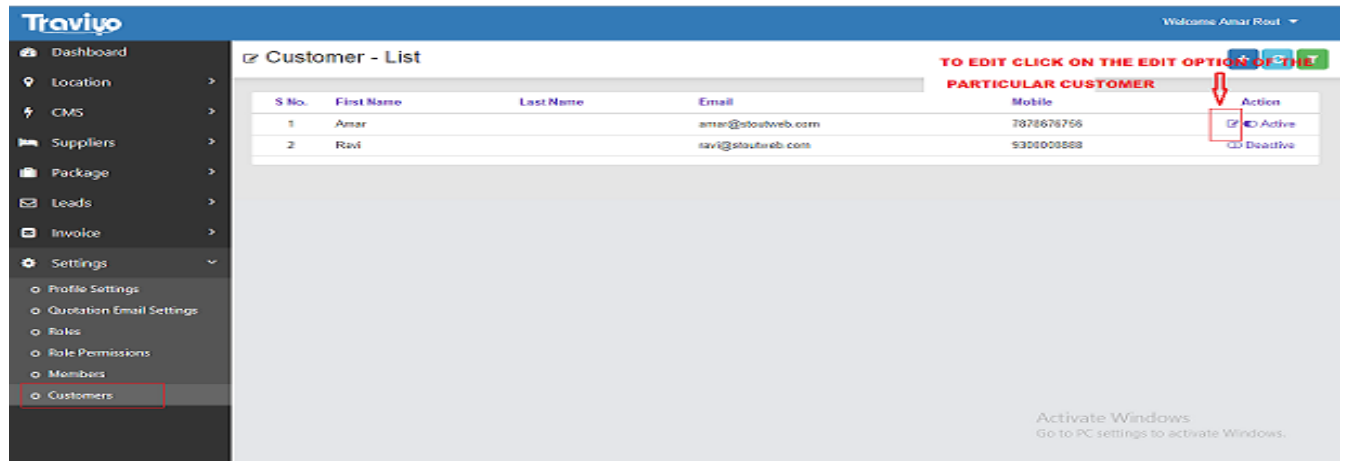
Password: Password

By clickon the submit button after enter all the field customer account has been created

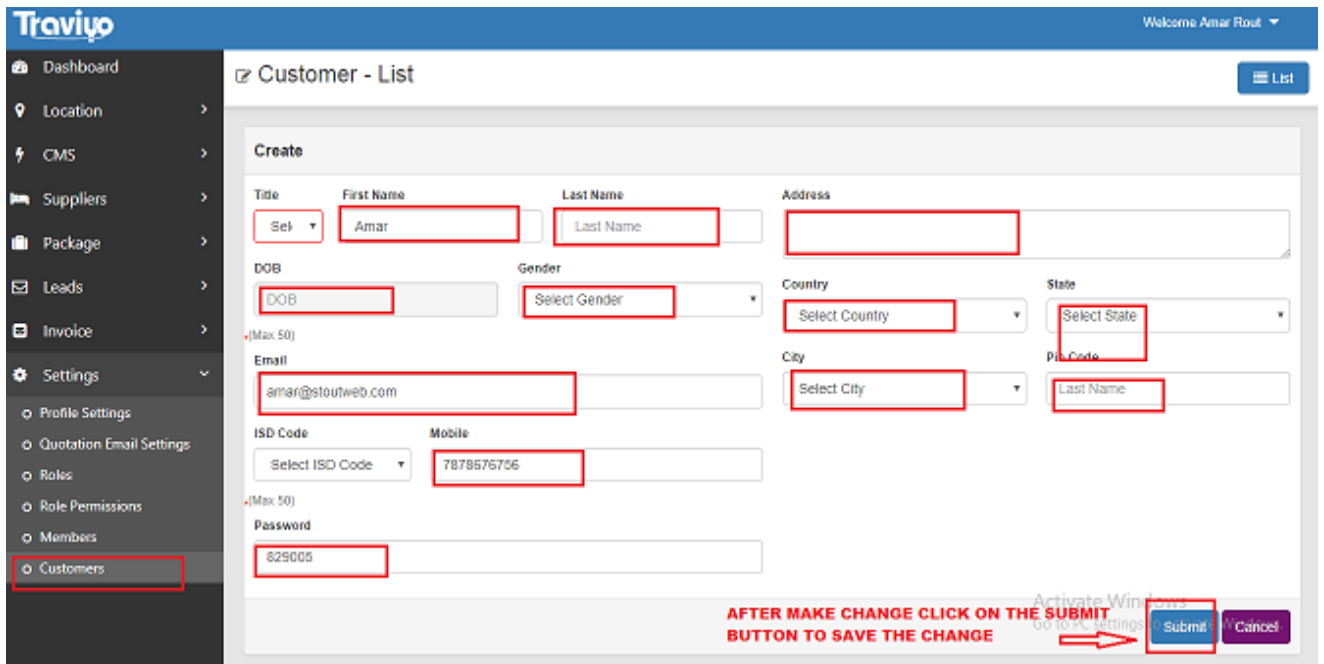
Submit Cancel

Steps for Edit Customer :-

1. Select Edit option from customer list of the grid.

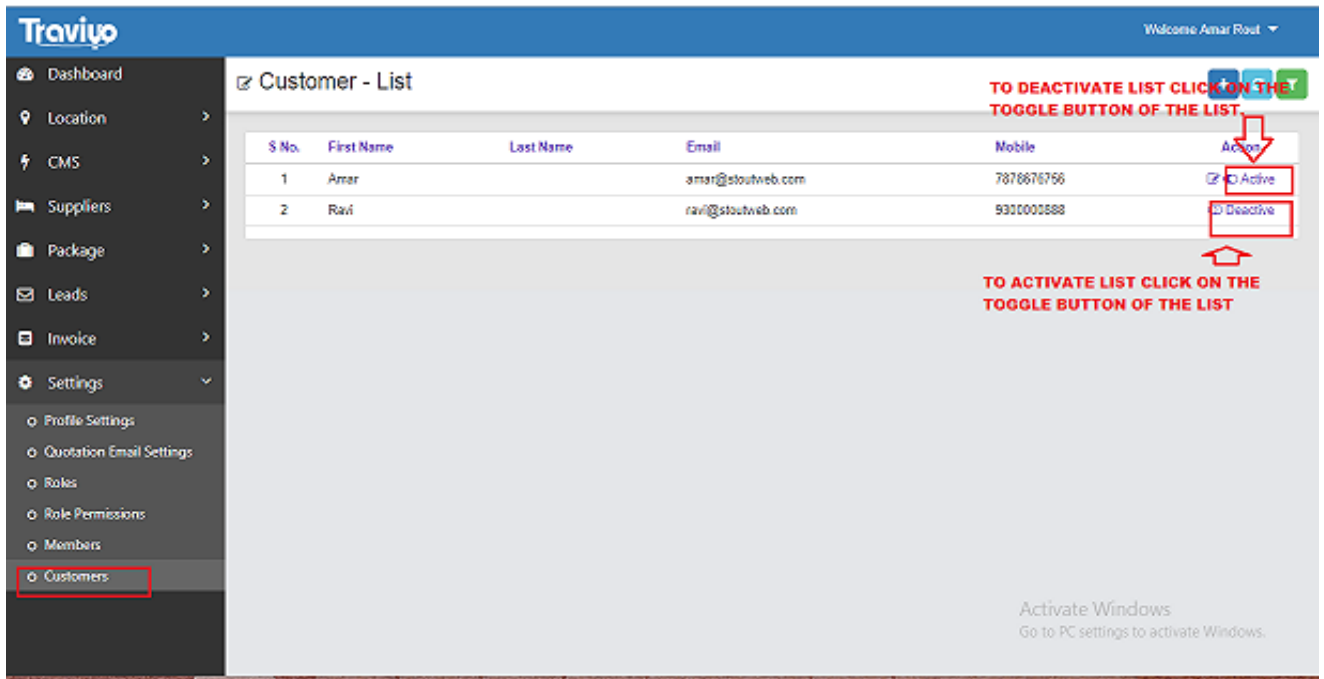


2. Click on the submit button after make change.



Steps for Active and Deactivate Customer :-

1. Click on the Activate and deactivate icon of the grid.

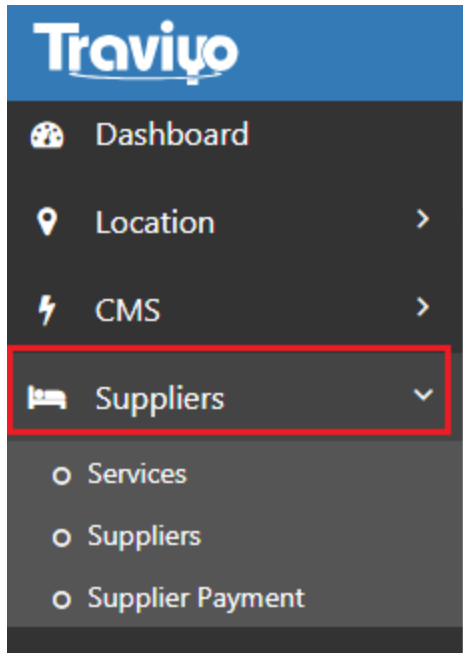


2.2.6 SUPPLIERS

Supplier have three main function . By which admin can manage services , suppliers and payment of suppliers.

The main flow of the suppliers module is as follow:-

1. **Manage services** :- To add, edit and delete the services admin use the services sub module. All the services function are control by this module.
2. **Manage suppliers**:- To manage(Create and edit) the suppliers admin use the suppliers sub module. By this module admin can control the suppliers function .
3. **Manage suppliers payment**:- From suppliers payment admin release payment for suppliers.



2.2.6.1 Services

From services sub module admin can manage the flow of services.

Some of the function of services sub module are as follows:-

- a. Create services.
- b. Edit services as per the change require.
- C. Delete the service if there is no requirement of services.

Steps for create services :-

- 1. Click on the add icon from the title menu.

Traviyo Welcome Amar Rout

Dashboard Location CMS Suppliers **Services** Suppliers Supplier Payment Package Leads Invoice Settings

Service - List

TO CREATE THE SERVICES CLICK ON THE ADD BUTTON

SNo.	Name	Status	Action
1	Package Booking	Active	✎ ✕
2	Air Ticket	Active	✎ ✕
3	Visa	Active	✎ ✕
4	Railways	Active	✎ ✕
5	Testing	Active	✎ ✕
6	traviyo	Active	✎ ✕

Activate Windows
Go to PC settings to activate Windows.

2. Fill the Require Field in the form.

Traviyo Welcome Amar Rout

Dashboard Location CMS Suppliers **Services** Suppliers Supplier Payment Package Leads Invoice Settings

Service - Create [List](#)

Create Service

FILL THE NAME OF THE SERVICE IN THE PARTICULAR COLUMN

Name

ADD THE FIELD AS PER THE SERVICES. TO ADD FIELD CLICK ON THE ADD FIELD BUTTON

+ Add Field(s) Submit Cancel

CLICK ON THE SUBMIT BUTTON TO CREATE THE SERVICES

Activate Windows
Go to PC settings to activate Windows.

3. Click on the submit button of the form to save the services.

Steps for edit services:-







1. Click on the edit icon from the particular list of services.

Traviyo Welcome Amar Rout

Dashboard Location CMS Suppliers **Services** Suppliers Payment Package Leads Invoice Settings

Service - List

TO EDIT THE SERVICES LIST CLICK ON THE EDIT ICON OF THE PARTICULAR LIST.

SNo.	Name	Status	Action
1	Package Booking	Active	
2	Air Ticket	Active	
3	Visa	Active	
4	Railways	Active	
5	Testing	Active	
6	traviyo	Active	

Activate Windows
Go to PC settings to activate Windows.

2. Change the Require Field in the form.

Traviyo Welcome Amar Rout

Dashboard Location CMS Suppliers **Services** Suppliers Payment Package Leads Invoice Settings

Service - Edit

Create Service

Name
Air Ticket

Field Name #1: Departure Airpo Control Type #1: Textbox Sequence No: 1 No

Field Name #2: Arrival Airport Control Type #2: Textbox Sequence No: 2 No

Field Name #3: Ticket Type Control Type #3: Textbox Sequence No: 3 No

Field Name #4: No of tickets Control Type #4: Textbox Sequence No: 4 No

AFTER FILLING THE FORM CLICK ON THE SUBMIT BUTTON TO SAVE THE CHANGES IN THE SERVICES.

Submit Cancel

3. Click on the submit button of the form to save the changes in the services.

Steps for delete services:-

1. Click on the delete icon from the list of the services.

Traviyo

Welcome Amar Rout

Dashboard

Location

CMS

Suppliers

Services

Suppliers

Supplier Payment

Package

Leads

Invoice

Settings

Service - List

TO DELETE THE LIST FROM THE LIST CLICK ON THE DELETE BUTTON.

SNo.	Name	Status	Action
1	Package Booking	Active	Edit Delete
2	Air Ticket	Active	Edit Delete
3	Visa	Active	Edit Delete
4	Railways	Active	Edit Delete
5	Testing	Active	Edit Delete
6	traviyo	Active	Edit Delete

Activate Windows
Go to PC settings to activate Windows.

2.2.6.2 Suppliers

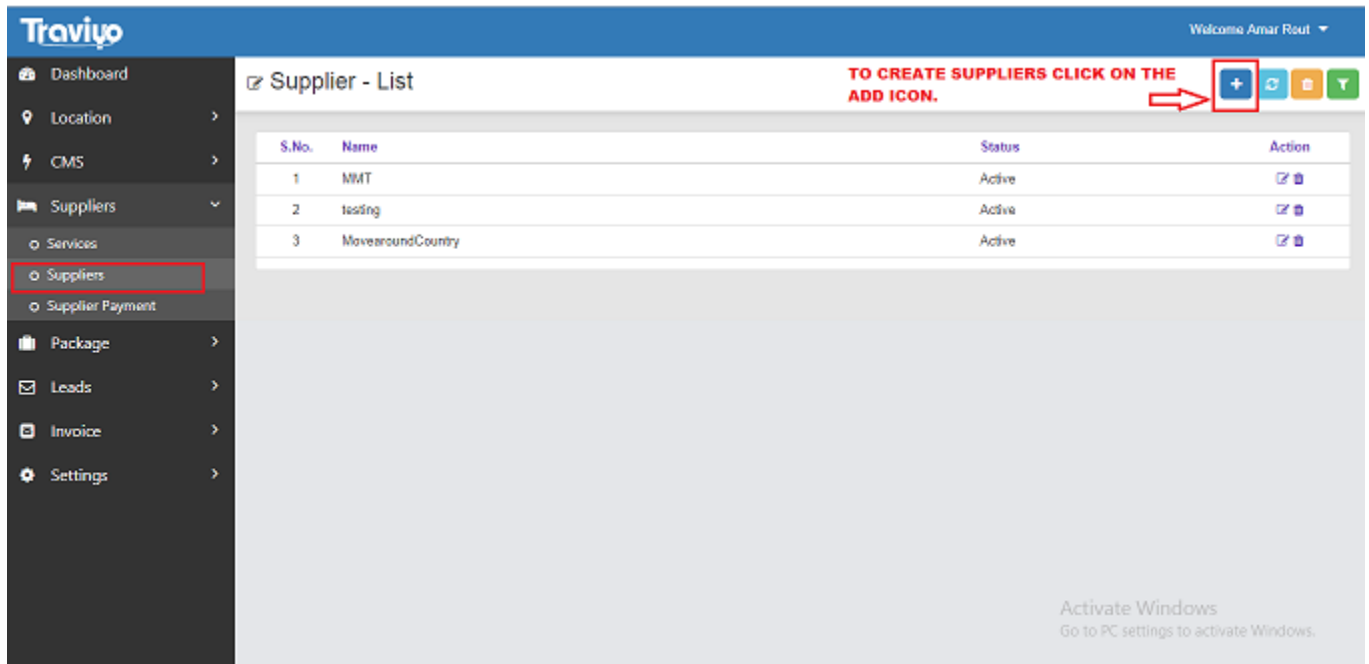
In suppliers sub module admin can manage the flow of suppliers.

Some of the function of services sub module are as follows:-

- Create suppliers.
- Edit suppliers as per the change require.
- Delete the service if there is no requirement of suppliers.

Steps for create suppliers :-

1. Click on the add icon from the title menu.



2. Fill the Require Field in the form.

The screenshot shows the 'Supplier - Create' form in the Traviyo application. The form is divided into several sections: 'SUPPLIER INFO', 'ACCESS SERVICES', 'COMPANY INFORMATION', and 'ACCOUNT INFORMATION'. Red boxes highlight the required fields in each section: 'Supplier Name', 'Email', 'Mobile Number', 'Name', 'Email', 'Mobile Number', 'GST Number', 'Bank Name', 'Account Number', 'IFSC Code', and 'Address'. A red text box at the bottom right says 'CLICK ON THE SUBMIT BUTTON AFTER FILLING THE REQUIRE FORM.' with a red arrow pointing to the 'Submit' button.

SUPPLIER INFO

Supplier Name:

Email:

Mobile Number:

ACCESS SERVICES

☐ All Time ☐ Package Booking

☐ Package ☐ Travel

☐ Hotel ☐ Visa

COMPANY INFORMATION

Name:

Email:

Mobile Number:

Phone:

Website:

GST No:

Pin Code:

ACCOUNT INFORMATION

Sr.No	Bank Name	Account Number	IFSC Code	Address	Add/Remove
1	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	+ Add

CLICK ON THE SUBMIT BUTTON AFTER FILLING THE REQUIRE FORM.

3. Click on the submit button of the form to save the suppliers.




Steps for edit suppliers:-

1. Click on the edit icon from the particular list of suppliers.

Traviyo Welcome Amar Rout

Supplier - List

CLICK ON THE EDIT ICON OF THE PARTICULAR LIST FOR MAKE CHANGE IN THE SUPLIERS LIST.

S.No.	Name	Status	Action
1	MMT	Active	
2	testing	Active	
3	MovearoundCountry	Active	

Activate Windows
Go to PC settings to activate Windows.

2. Change the Require Field in the form.

Traviyo Welcome Amar Rout

Edit

SUPPLIER INFO

Supplier Name: MovearoundCountry

Email: ravi@traviyo.com

Mobile Number: 0078675640

ACCESS SERVICES

☐ Air Ticket ☐ Package Booking

☐ Railways ☐ Testing

☐ Traviyo ☐ Visa

COMPANY INFORMATION

Name: MovearoundCountry


Email: ravi@traviyo.com

Mobile Number: 9411786756 Fax: 4567898

Website: www.movearoundcountry.com

GST No: 222556 Pin No: 69547876

ACCOUNT INFORMATION

Sr.No	Bank Name	Account Number	IFSC Code	Address	Add/Remove
					

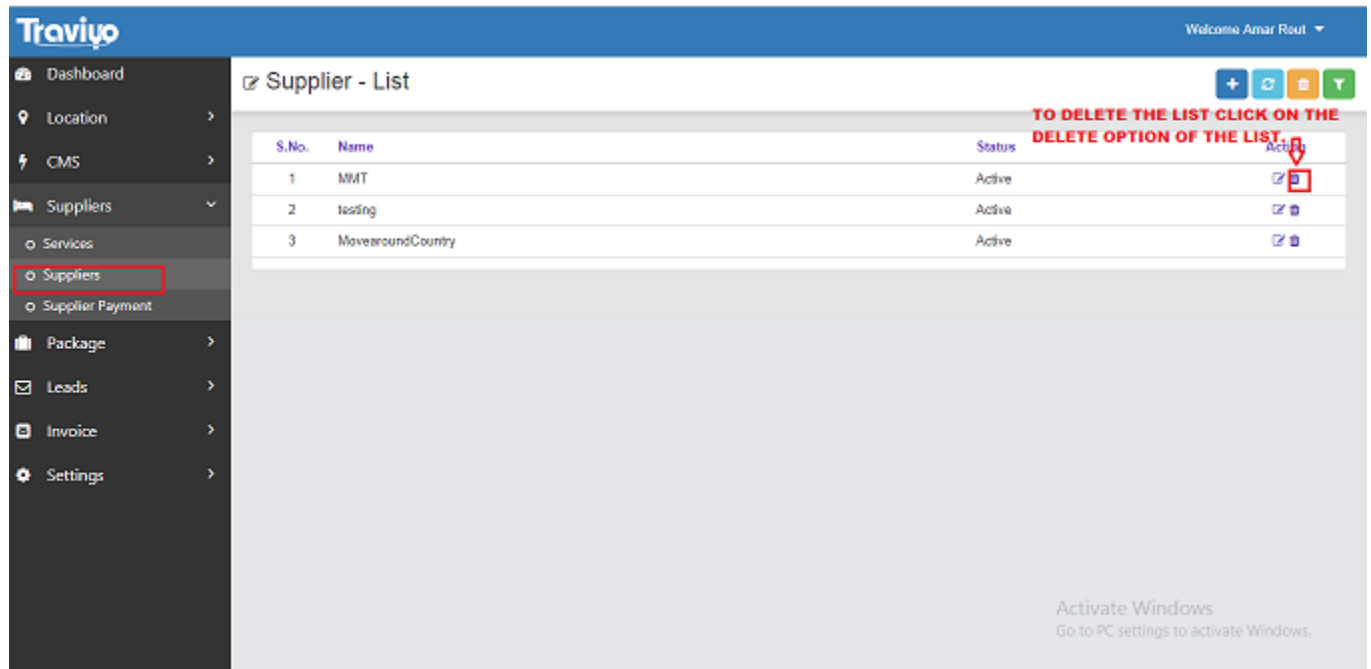
AFTER MAKE CHANGE OF REQUIRE FIELD CLICK ON THE SUBMIT BUTTON TO SAVE CHANGES.

Submit Cancel

3. Click on the submit button of the form to save the changes in the suppliers.

Steps for delete suppliers:-

1. Click on the delete icon from the list of the suppliers.



2.2.6.3 Suppliers payment

In supplier payment module admin can release the payment of the suppliers. It keeps all the record of the payment . If admin want to release payment in instalment it is possible from this sub module.

Flows of the suppliers payment:-

1. Release amount of payment.
2. Check the paid and pending payment for the suppliers.
3. Admin can also release payment in instalment as per the convenience.

Steps for the Release suppliers payment:-

1. Tab to the suppliers payment.
2. Click on the release suppliers payment to release payment for suppliers.

Dashboard

Location >

CMS >

Suppliers >

o Services

o Suppliers

o Supplier Payment

Package >

Leads >

Invoice >

Settings >

Supplier Payment - List



Sno.	Ref No.	Service	Supplier	Amount	Tax	Net	Due Date	Paid	Pending	Action
1	TVY21591	Railways	MMT	4000	720	4720	10/4/2018	4000	0	Release Payment

**CLICK ON THE RELEASE PAYMENT BUTTON TO
RELEASE PAYMENT FOR SUPPLIERS.**

Activate Windows
Go to PC settings to activate Windows.