Entering Bookings Workflow

VCRM Workflow

This is a typical workflow in VacationCRM. Note that some of these steps may not be used depending on how your agency operates and how you are using VacationCRM. This guide is just the basics for entering bookings into the system. It does not include some of the other features you can use after entering bookings as those will be covered in other documentation.

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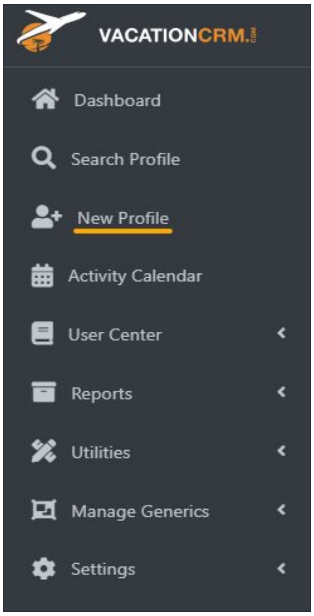
- There are two ways to do this. The first is to click New Profile, enter all the details you have for the client and click Create. It is recommended to at least enter the name and email address but the more information you have, the better. Once the profile has been created, click Add New Lead to create a lead under this client's profile. Leads are created for clients that you are working with that have not booked a trip yet. In the lead screen, you can name the trip, enter the status, take notes on what the client is looking for, enter the trip date and trip duration, the client's budget (estimated trip cost), and more. Click Create when you have entered everything. This will add a new record in the trip leads section of the dashboard where you can see a list of all clients that you are actively working with.

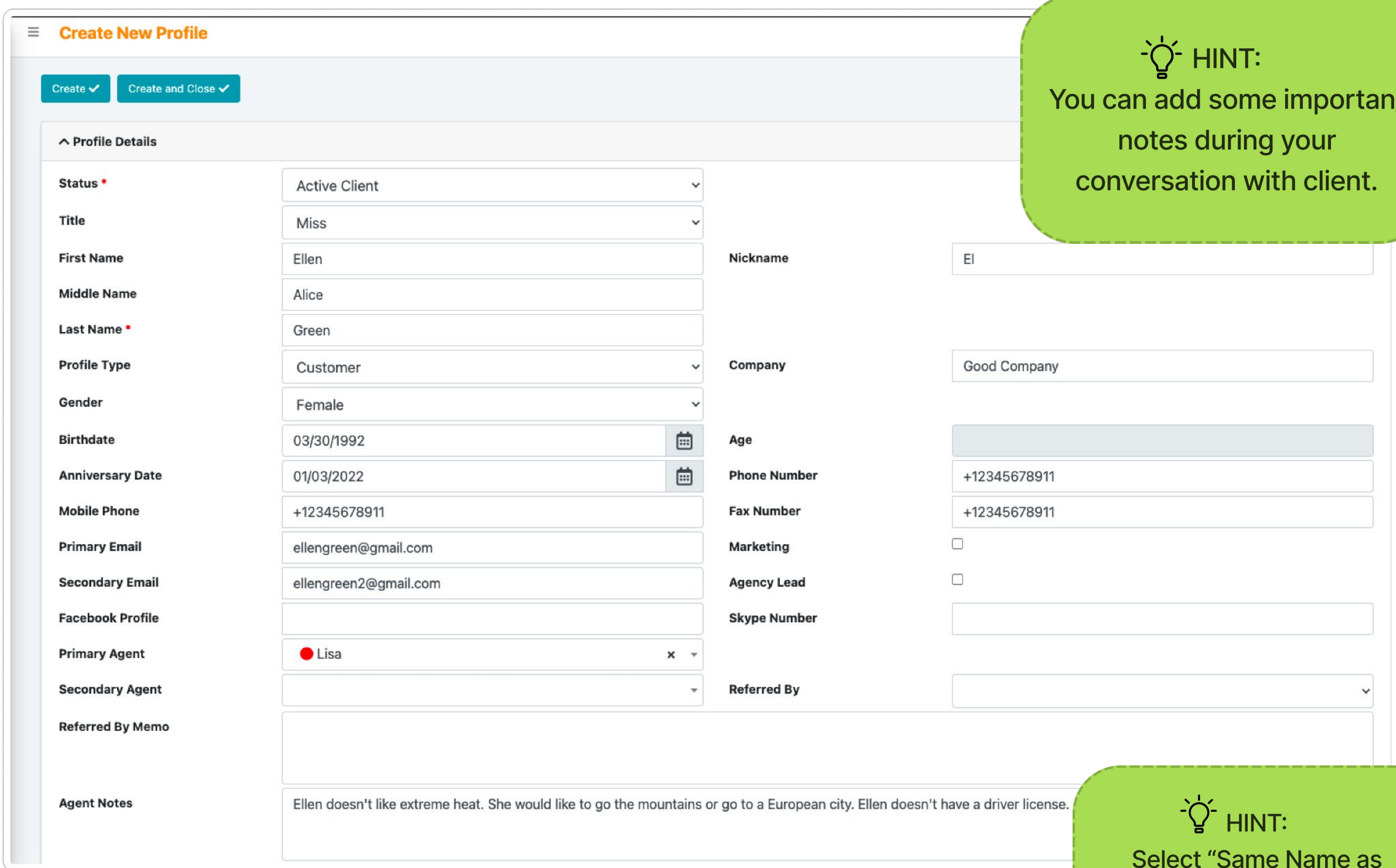
- The second option to creating a profile/lead is to use the Trip Lead API Form. This is only available when you are on the Pro version of VacationCRM. This is a form that can be sent to the client where they can fill out their information and what they are looking for on their trip such as dates, destination, budget, and more. When this is submitted, it will create a profile and add a lead under that profile for you automatically.

Create client profile and add a trip lead under that profile

Step 1. Navigate To “Create New Profile Page”



Step 2. Fill “Create New Profile” page and fill all required fields

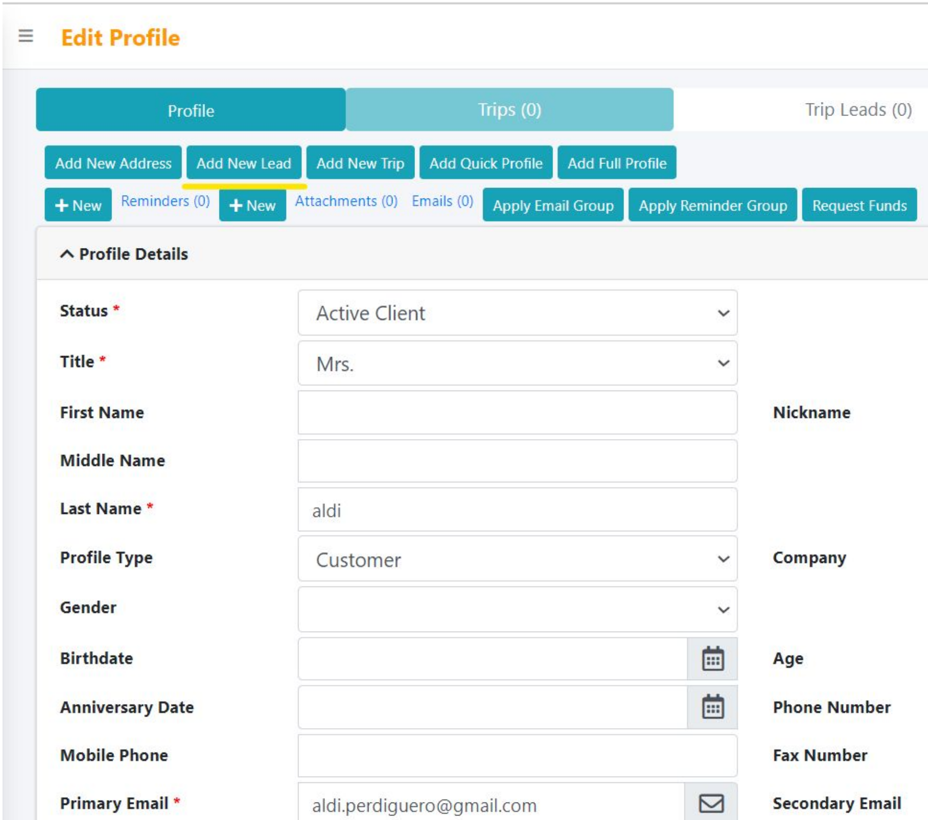


HINT:
You can add some important notes during your conversation with client.

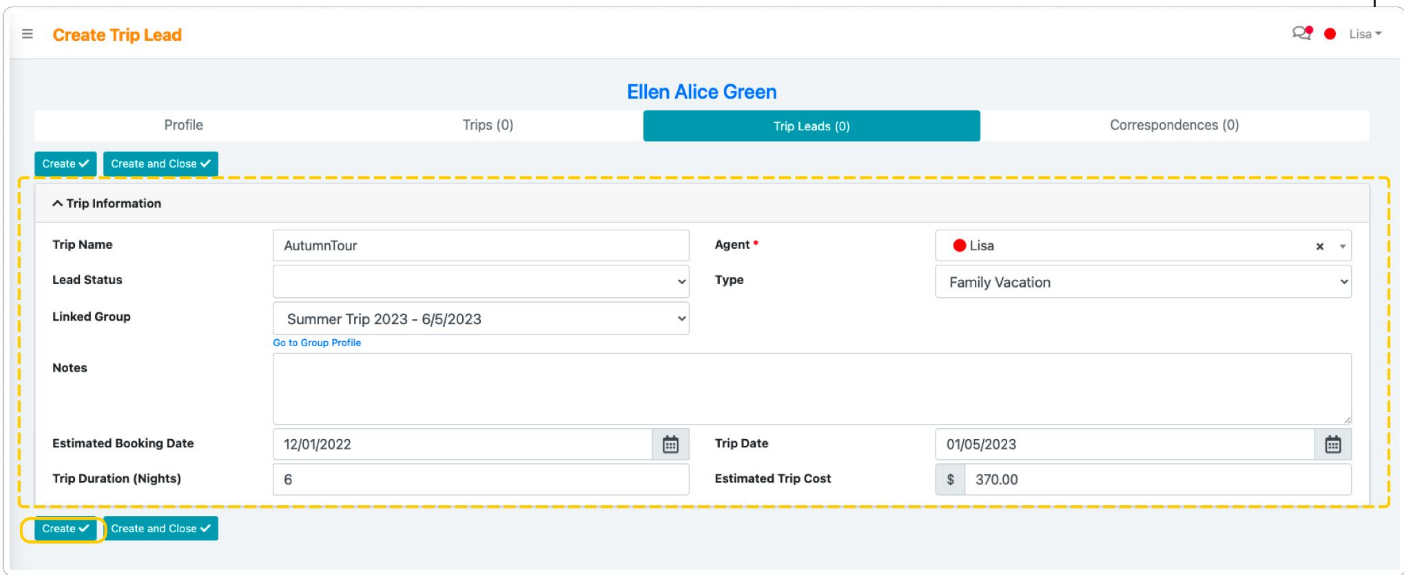
HINT:
Select “Same Name as Primary” option to fill these fields automatically.

Create client profile and add a trip lead under that profile.

Step 3. Click the "Add new lead" button.



Step 4. Fill in all required fields and click on the "Create" button



Edit the lead as you work with the client

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You can add additional notes as you get more information from the client, update the status as you send the client information or a quote. You can use the Trip Leads section of the dashboard to keep an eye on your active leads.

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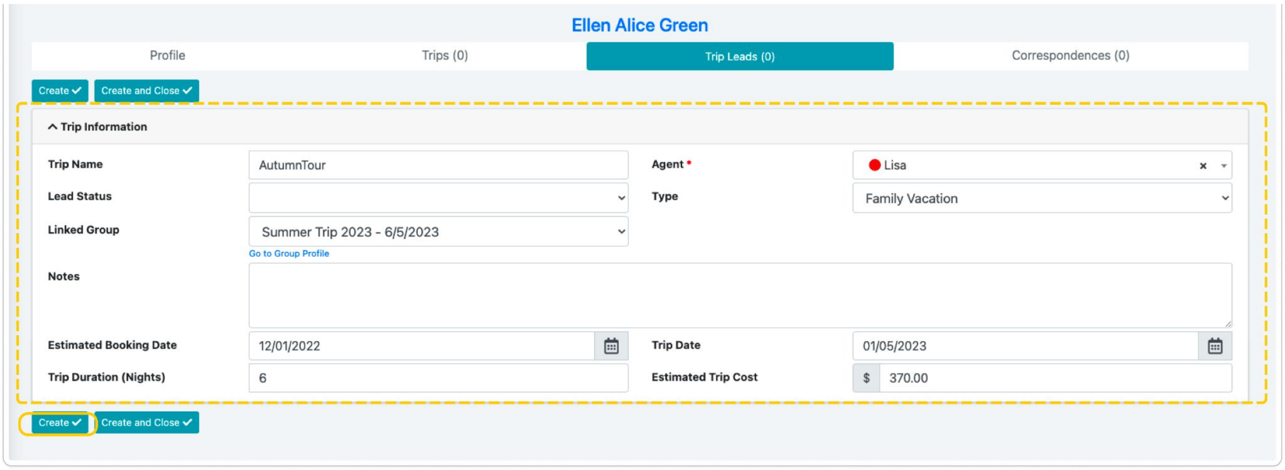

If the client ends up not booking a trip, close out the lead.

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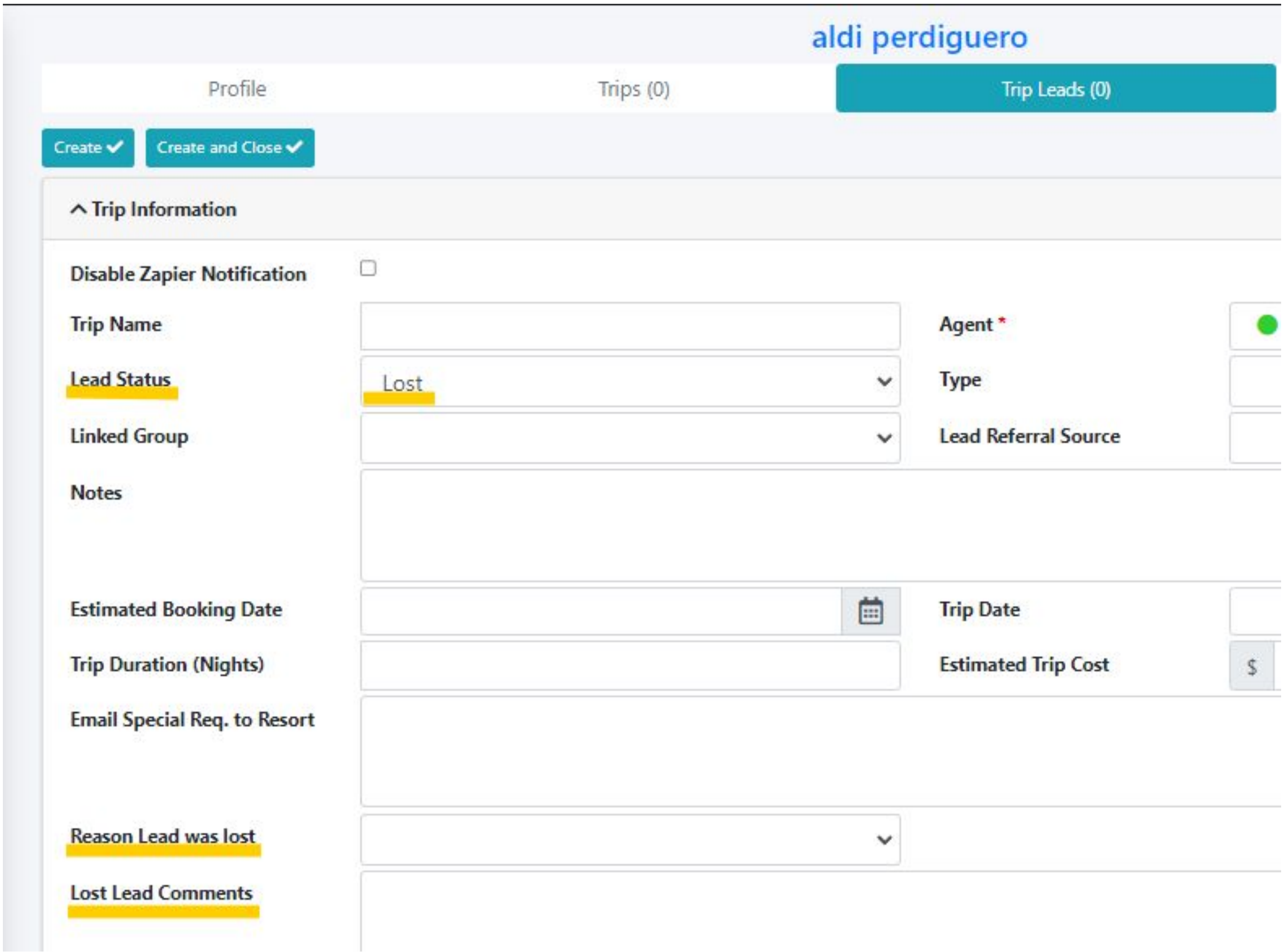
Step 1. Change the trip to "Lost"

Go to the client's lead and change the status to Lost (meaning they didn't end up booking a trip). When you select Lost as the status, you will see two new fields will appear on the lead screen that allow you to select the reason the lead was lost, and add any notes for more details on why it was lost if you would like to keep track of that information.



When the client has been quoted, and is ready to book, a trip must be created.

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1) Much like adding leads, there are multiple ways to add a trip. If you are going to manually enter a trip, first go to the client's profile and create profiles linked to theirs for everyone traveling with them on this trip. You can check the family and friends section of your client's profile first to make sure profiles are not already linked to your client. If no one is listed under family and friends, but they are traveling with someone, you can add a profile by clicking either Add Quick Profile or Add Full Profile towards the top of the screen. These will both create the same type of profile, but quick profile is a faster way to do this as you typically don't need more than the basic information for additional attendees on a trip. Make sure to select the relationship type between your lead client and the additional attendees when creating the additional profiles. If you do not select a relationship type, it will not link the profiles. If you know a profile exists for any of the additional attendees in your account, but they are not linked to your lead client, you can scroll down to the family and friends section, click Add new Profile Relationship. This will allow you to link two existing profiles together. Click Look up name, search for the additional attendee, click Link, select the relationship type, and click Create Link. Once this has been done, click Add New Trip from the lead client's profile. On the New Trip screen, you will enter the name of the trip. The format you use for trip names is completely up to you, but it is recommended to name it something that will tell you which trip this is just from the trip name. Most users will do something like this: Family Vacation Hard Rock Riviera Maya Oct 2025. Make sure to also select a trip status as this is very important to keep track of where you are at with this booking. In most cases, Awaiting Deposit is the status that will be used at this point. Enter things like the trip type, destination (country), etc. The only other things that can be entered at this point would be the final payment due date, trip date, and trip duration. You will notice that you cannot enter the trip total, trip total paid, or trip balance due. This is by design and these figures will be populated when you finish adding a reservation and/or any payments.

Note: depending on which supplier you booked the trip under, you may be able to leave the final payment due date, trip date, and trip duration blank for now, but it doesn't hurt to enter that information now if you would like to.

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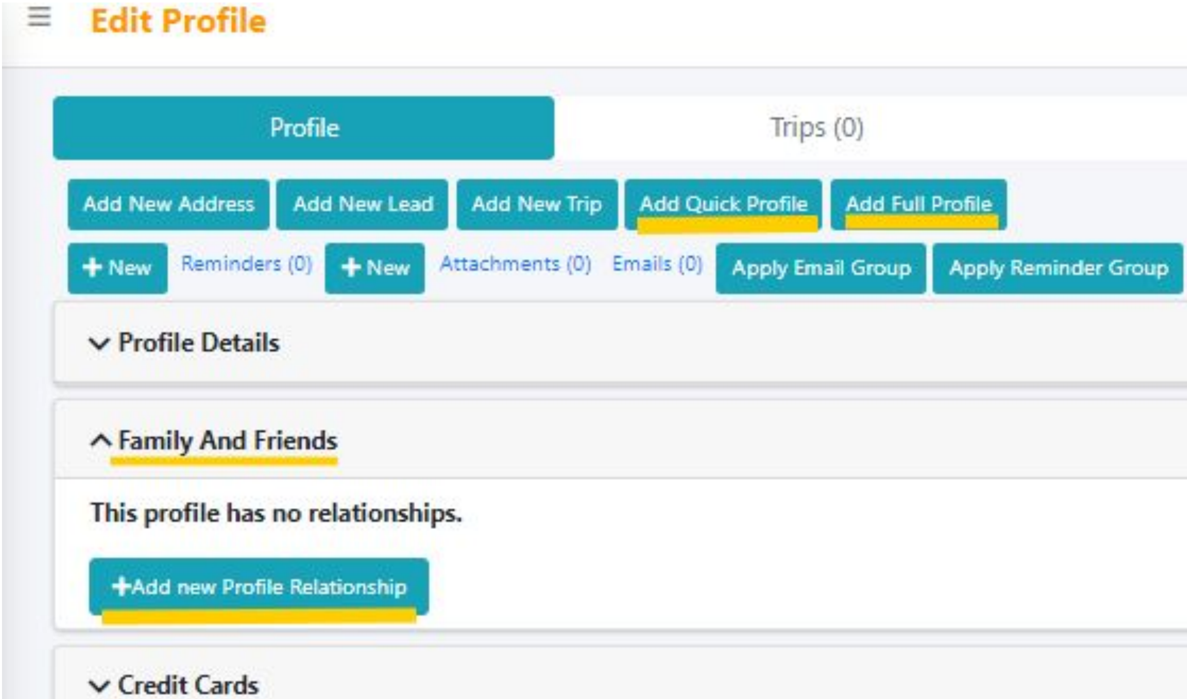
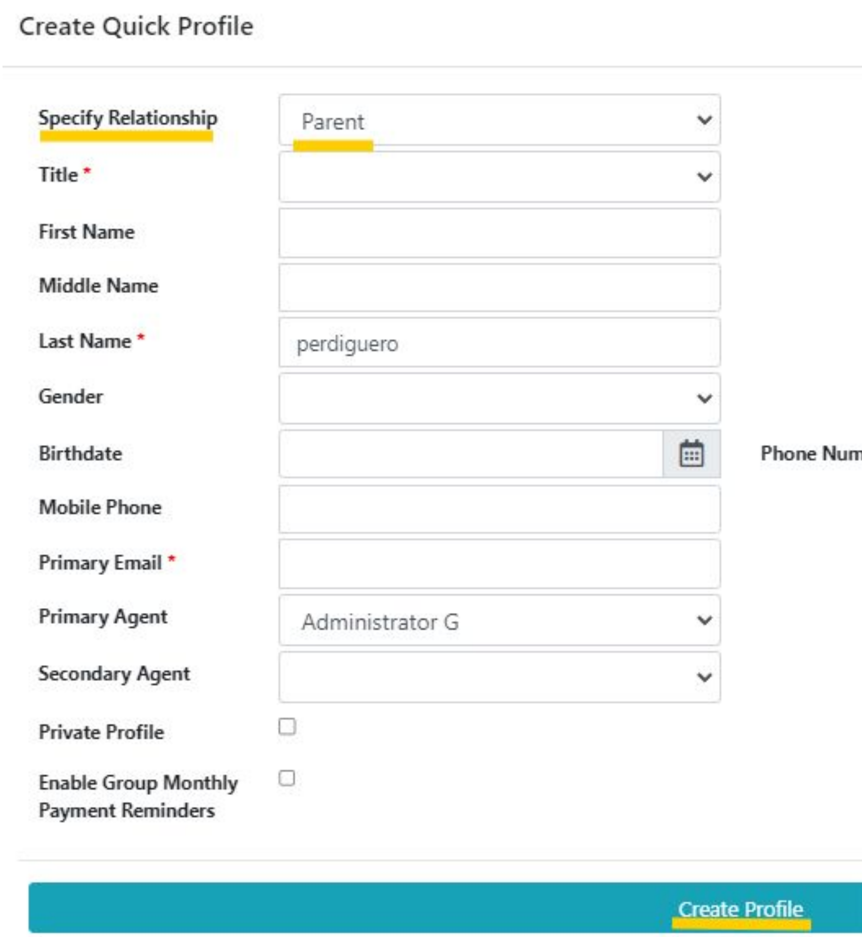
Review "family and friends" and "add quick profile" or "add full profile"





When the client has been quoted, and is ready to book, a trip must be created.

2) The second option to get the trip created is to send the Registration Form to the client to fill out. This is a form that is generally embedded on a page on the agency's website so agents can quickly send a link to that form to the client. On this form, the client will fill out 4-5 sections (depending on your settings). Included on this form is a spot for them to select the number of guests on the trip and enter the information for each guest. They will also enter the trip information in step 3 of the form. Step 4 will allow them to enter their payment information as well as how much they would like to pay for their initial deposit. When this form is submitted, it will create profiles for anyone that doesn't have a profile created and link the profiles to guest one's profile. It will also create a trip and store the credit card that they entered under guest one's profile.

- **Once the trip has been created, close out the lead.**
- **Book the client's trip with your preferred supplier.**

Once the trip has been created, close out the lead

To do this, go to the client’s lead and change the status to Closed (meaning the client booked and the lead is being closed) as you are done with the lead and will be working in their trip from now on.

Book the client’s trip with your preferred supplier.

If you can, only put it on hold and go far enough to get a booking number without paying the deposit on the trip.

Adding Reservation(s)

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The reservation screen is where you will enter the actual booking details (reservation components, pricing, commission, etc.) In some cases, you may just have one reservation that is a single package with everything booked for the entire trip, while other times you may have several reservations under the trip because you used more than one supplier to get everything booked for the client's trip. The general rule to follow is if something has a different booking number, it should be added as a separate reservation within the trip. To add a reservation, you will click Add New Reservation from the trip screen. This step also has several different ways to enter the details which are listed below. Regardless of which option you use below, you will first need to select the reservation type, select the supplier, and enter the booking number.

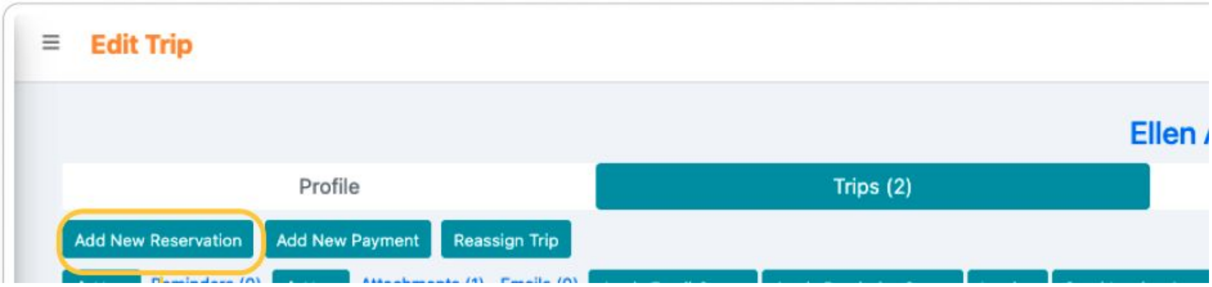
a) Importing a booking from a supplier: Some suppliers have a direct integration with VacationCRM. To see a current list of integrated suppliers, check the Integration Information section of the user center. After entering the three items listed above, you will simply click Update Reservation from Supplier. This will send a request to the supplier for their system to send all the booking details to your account, so they can be loaded into the reservation for you. This typically includes all reservation components (flights, hotel, transfer, etc.), as well as pricing, commission, required deposit amount, and more. As you scroll down, you will see the reservation components that were imported. These are what help build the client invoice. It is generally recommended to clean these up by rearranging the items to put them in chronological order and hide the items that aren't needed on the invoice. There is a button towards the top of the reservation screen for Order Reservation Components by Date that will help rearrange things for you. If you still need to arrange more, you can scroll down to the components, click Collapse, drag and drop any other components where you need them, and then click Expand to make sure everything is in the correct spot. Often times, suppliers will import "other" reservation components that aren't necessary to be on the invoice so you can simply check the box for Do Not Show on Invoice on those items to hide them from view.

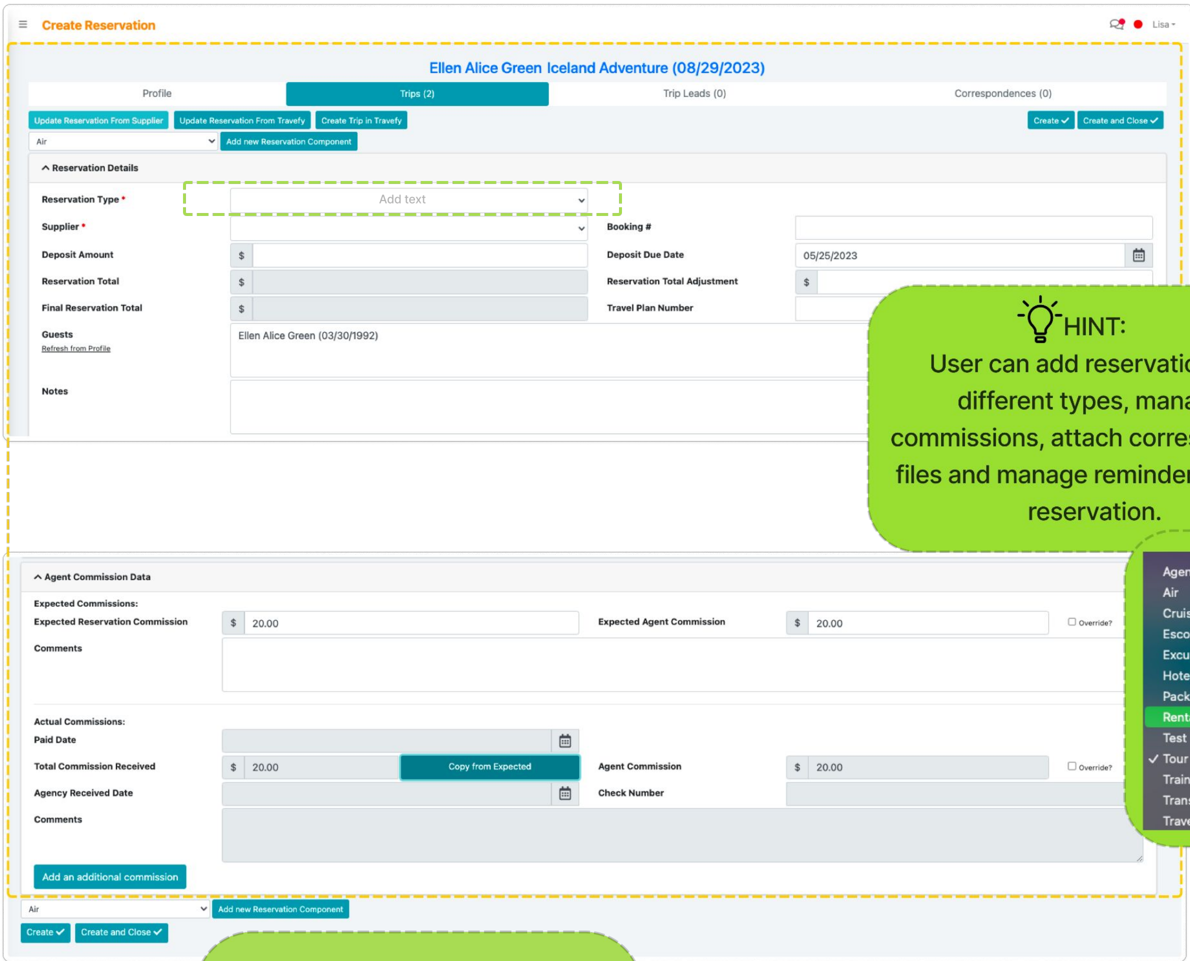
b) **Using the VacationCRM Stripper:** There are also several suppliers that are not integrated with VacationCRM but do work with the VacationCRM Stripper feature. This feature allows you to use the confirmation email that the supplier sends you when you book the trip to import the booking details into VacationCRM. If the supplier offers a client and agent copy of these emails, it is best to use to agent copy as those tend to include commission information that can be imported for you. There is a list of suppliers that work with the stripper in the PDF document found in the Integration Information section of the user center. To use the stripper, on the reservation screen first enter the reservation type, select the supplier, enter the booking number, and click Create. Once the page reloads, you will see a button next to the supplier name that will either say Paste Reservation or Upload Reservation. Suppliers that use HTML format in their confirmation emails such as VAX or Disney will show the Paste Reservation button. For those, you will need to copy the entire confirmation email, click Paste Reservation, and paste it into the box that pops up in VCRM. It is important to copy the entire email. Generally these will have some sort of logo or header at the top of the email that needs to be included, and you will copy all the way to the bottom of the email where you would typically find any fine print or copyright notices. Note: for Delta Vacations, it is best to copy from your actual account rather than from the email they provide to you. When you pull up the booking, look for the itinerary for it, and paste that page into VCRM. Suppliers that use PDF confirmation emails will show an Upload Reservation button. First, save the confirmation PDF to your computer. Then click Upload Reservation, select that file on your computer, and click Process. Whether you pasted or uploaded, after Processing, you should see the information has been entered in the system for you. You can then scroll down to the reservation components to make sure everything looks correct. Much like with importing directly from the supplier, this is now when you will want to clean up the components by putting them in chronological order and check the Do Not Show on Invoice box for any components that you do not want/need to show on the invoice. Click Save when you are finished.

c) Manually Entering Reservation Details: If the supplier you used is not on the list of integrated suppliers or suppliers that work with the VacationCRM Stripper, you will need to manually enter the reservation details. First, select the reservation type, supplier, enter the booking number, and click Create. Then scroll down to see if you have any empty reservation components entered. In most cases, it will add blank components for you based on the reservation type you selected. You can remove any that do not apply to this booking, or add more if needed. For example, if you select “Package” as the reservation type, it will typically add blank components for Air, Transfer, Hotel, Transfer, Air, and Insurance. However, if this client’s trip has connecting flights each way, you would need to add two more air components. You can do this from the top or bottom of the reservation screen. You will see a dropdown that says Air. When you click that, it shows you the list of different reservation components. Select the one you need, and click Add New Reservation Component. In some cases, you will need to add all components manually. You can select each one and click the Add New Reservation Component (preferably adding these in chronological order) until you have all that you need. Note that you can use Custom for anything that isn’t listed in the drop down that you want to have labeled just like the other items. Once you have added the blank reservation components, scroll down to enter the details for each one. The reservation components are where you should be entering your reservation pricing. If you can break down the pricing per component, do so. If there is no way for you to know the breakdown of the price, you can just enter the total cost against the main component. Typically, this would be a hotel or cruise but could be other things if you are working in a separate reservation like a transfer or insurance. You do not need to break down the pricing per flight segment meaning if you have a client that has four total flights on their booking and the cost of those flights are a total of $1,000.00, you can just enter $1,000.00 under the first flight, and leave the price at $0.00 for the other three flights. Once you have entered all the details, make sure to click Save.

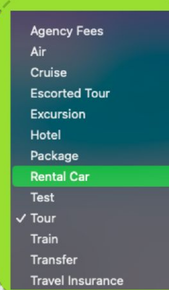
Adding Reservation(s)

Example





HINT:
User can add reservations of different types, manage commissions, attach corresponding files and manage reminders for the reservation.



HINT:
User is able to add additional commissions

- **Previewing/Generating an Invoice**
- **Sending the client an Invoice Approval**

Previewing/Generating an Invoice

Once you are satisfied that everything on the reservation screen looks good, you can scroll to the top of the reservation screen and click Preview Invoice. This will show you what the invoice will look like for the client. Sometimes it is easier to see missing information in this view. If you see anything that needs to be added or adjusted, close the preview, go back to the reservation screen, make your changes and click save, then preview the invoice again. If everything looks good on the preview, you can click Generate Invoice. Every time you click Generate Invoice, the system will save a copy of the current version of the invoice to the client's trip screen. You typically want to generate a new invoice after each change is made to the client's trip which is most often when the client makes a payment and you have recorded it in VCRM.

Sending the client an Invoice Approval

The invoice approval is similar to the regular invoice, but it is designed to send to the client before they have paid their deposit to allow them to sign off and approve that the information is correct and they agree to the terms listed. Generally, agency owners will set these up for agents under their agency, but users can create their own if needed under Settings > Invoice Approval Details. There can be several templates created for these for different situations whether it be different terms for different types of trips, or one version for clients who have accepted travel protection and one version for those who have declined travel protection. After templates have been set up for these and you have entered all reservation details for the client, go to the client's trip screen, click Send Invoice Approval, select the template you would like to use, and click Submit. It will show you a preview and allow you to click to send it to the client. Once the client has filled out the information and submitted it, you will receive an email notification showing you whether the client approved or declined the invoice. You can also scroll down to the invoice approval section of the trip screen to see the status. If approved, you can then run the client's card for deposit on their trip.

Adding Payments

Adding Payments

Payments are always added from the client's trip screen. To add one, simply click Add New Payment at the top of the trip screen. There are two ways to add/run payments on this screen.

1) Submitting payments to supplier directly: Some suppliers have the ability for you to submit payments directly to them from VacationCRM. To see the current list, go to the Integration Information section of the user center and refer to the PDF document there. For these suppliers, you will click Add New Payment, enter the payment amount, payment type, select the credit card from a list of saved cards to the profiles of the clients on this trip, or enter the credit card information manually, select the associated reservation from the drop down at the bottom, and then click Submit Payment to Supplier. Note that clicking this button is like running their card so make sure the details are correct before clicking this button. After you have clicked it, there will be a popup to enter the CVV for the client's card and you will click Submit. Once you have done this, simply wait for the response message that you should see within a few seconds. It will either show a green success meaning the payment went through, or you will see an error message of some sort. If you see the error message, it will ask you if you would like to update the payment amount to $0.00 to avoid crediting the trip. You do want to do this so it doesn't show that payment as having gone through which would make the balance of the trip incorrect. After payment has been made successfully, you can generate a new invoice, and send it to the client with the email icon located next to the newly generated invoice in the trip invoices section of the trip screen.
2) Recording payments made in the supplier's system: If the supplier you have booked with does not have the capability to accept payments directly from VCRM, you will need to make the payment directly in the supplier's system, and then come back to VCRM to record the payment so the balances match in each system. After you have run their card for payment with the supplier, go to their trip in VCRM, click Add New Payment, enter the payment amount, payment date, payment type, credit card information and click Create. Note: you do not need to select an associated reservation as that is only used to tell VCRM which supplier to send payments to for the ones that are integrated for payment capabilities in VCRM. Once you have created the payment, you can generate a new invoice, and send it to the client with the email icon located next to the newly generated invoice in the trip invoices section of the trip screen.