



- 1 Trusted by Travel Agencies and Tour Operators in 30+ Countries
- 2 Tailored for Unique Needs of Travel Agencies and Tour Operators
- 3 Built on Award Winning ZOHO CRM, Trusted by 50,000+ Customers Worldwide

# GOLDENLION

[www.glionconsulting.com](http://www.glionconsulting.com)

## Travel Agency CRM

CRM That Every Travel Agency Loves

# Travel Agency CRM

Created specifically for the needs of travel agencies on award winning Zoho CRM, **Travel Agency CRM** delivers outstanding value with an astounding array of features for a fraction of the cost of any comparable industry system.



I can't say how much I'm happy and thankful for the service provided to my company. Arnab and his team are always there and ready to help. They made this transaction very enjoyable and I am so excited to start working with the software. I already know that it will bring my company to a new dimension.

**Rene Piard**, Owner, A La Carte Travel

## FEATURES

- Lead Management
- Contact Management
- Trip Planning
- Quote and Invoice
- Vendor Reservation
- Reports and Dashboards
- Email Integration
- Workflow Automation
- Role-based Security
- Unlimited Records

- Fixed Departure
- Multiple Currencies
- Time-based Actions
- Auto Email to Lead and Contact
- Auto Profit Calculation
- Auto Payment Status Update
- Custom Modules
- Data Sharing Rules
- Custom Buttons



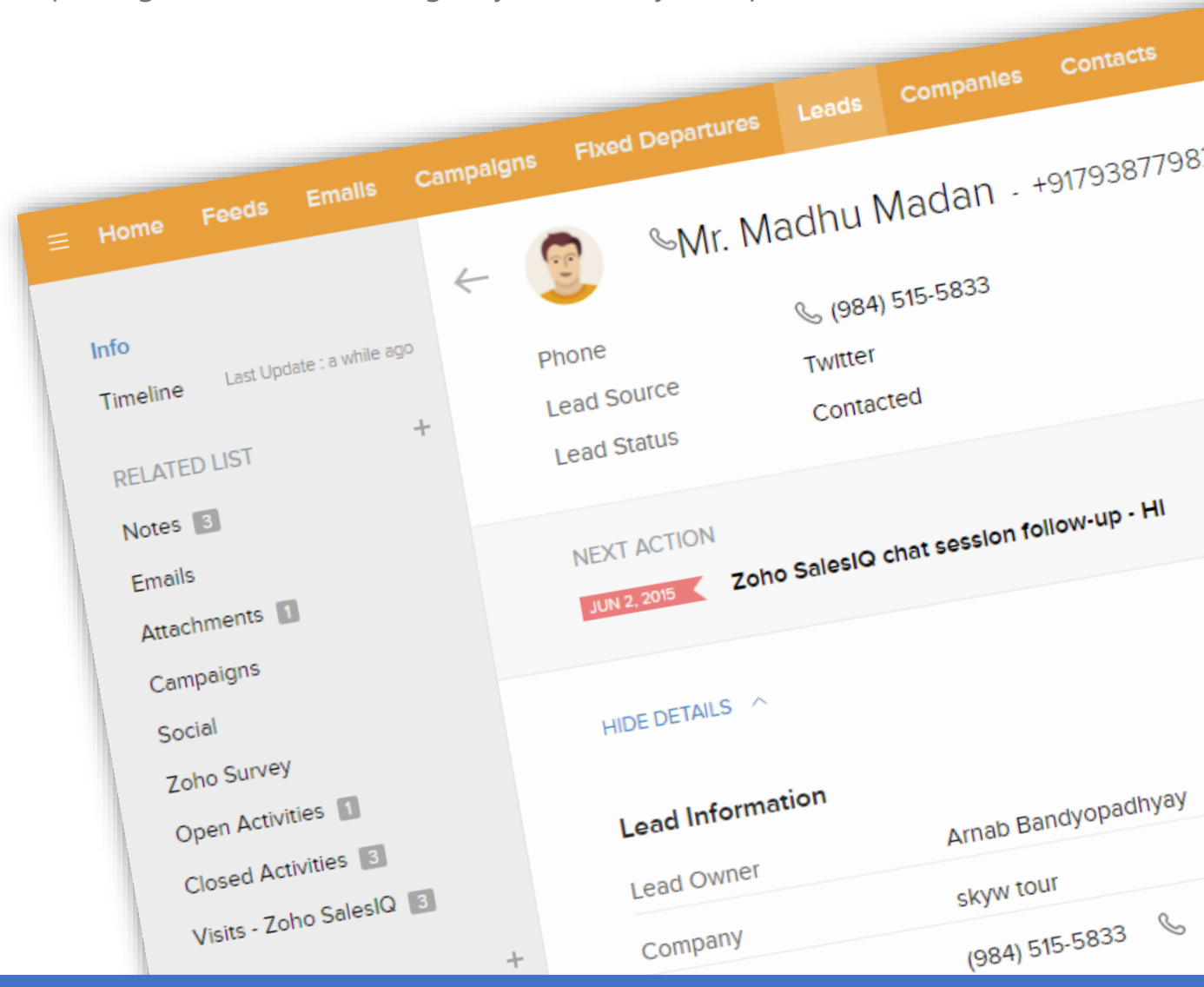
“Within the first two communications with GoldenLion I knew this was 'the' company to work with. Superb communication. They are, and continue to be, very professional. They have understood the specialty of our travel business, and delivered a fantastic product. Their knowledge, commitment and feedback is outstanding; and I really look forward to future projects”

**Claire Vial**, Director, African Safaris Ltd

# Finally! A Lead Capturing Machine

Entering leads from various sources into the CRM is one of the most mundane job for any business owner! The scenario is the same for Travel Agencies too! But not anymore! The powerful lead capturing feature of Travel Agency CRM lets you capture leads from multiple sources within your CRM system.

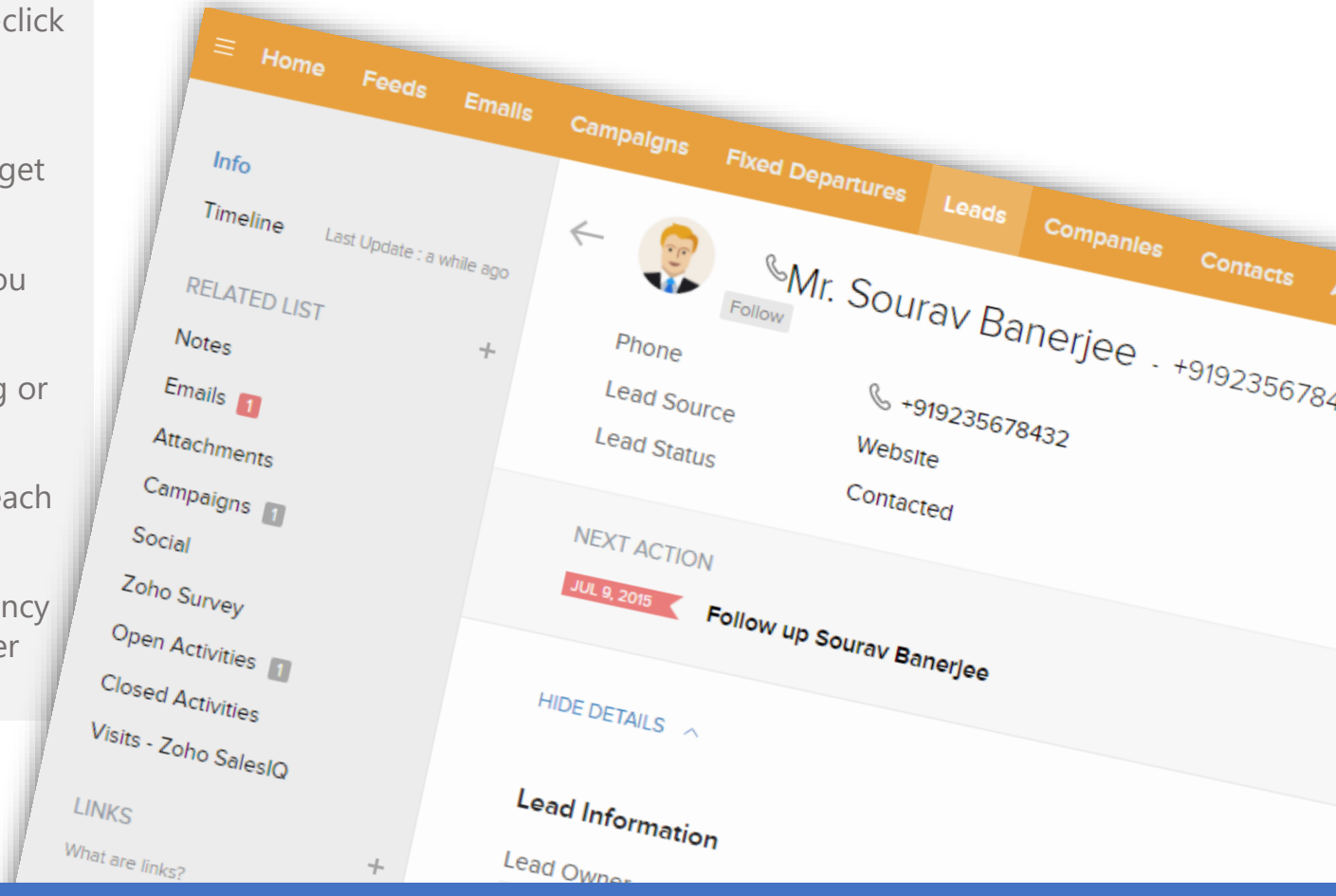
- ✓ Travel Agency CRM integrates easily with your website enquiry forms and captures Leads directly into CRM
- ✓ When integrated with ZOHO SalesIQ, Travel Agency CRM captures Leads from every Live-chat session
- ✓ The CRM system monitors and lets you participate in Social Media activities, as well as convert any contact (from the social media platforms) into Lead with 1-click.
- ✓ Travel Agency CRM lets you import all your previous contacts in Excel format.
- ✓ In addition, the amazing system lets you add any number of leads in the good-old way i.e. manually.



# The Science of Lead Follow-up

Nurturing the leads is as crucial as capturing them! This is especially true for Travel Agencies, as they have to interact with their clients regarding myriad topics such as accommodation preferences, food preferences, necessary travel documents such as passport or visa etc.

- ✓ The powerful follow-up feature lets you send pre-defined emails, create the next tasks and update lead status with 1-click only.
- ✓ The awesome Travel Agency CRM lets you create tasks for yourself or a team member and set reminders, so that you get notification for each upcoming task.
- ✓ The system features an intuitive calendar which will send you advance notifications for each upcoming meeting.
- ✓ Travel Agency CRM lets you schedule calls, record incoming or outgoing calls and create the next task as well.
- ✓ The system lets you upload necessary documents against each lead, so that you can have them handy when you need.
- ✓ A perfect tool for enhancing team performance, Travel Agency CRM lets you add notes for each conversation and tag other team members from within the notes.





“ I have been pleasantly surprised by your courteous manners and professionalism coupled with your prompt attention to my countless requests, for which i am most grateful. You patiently 'listened' to all my questions and queries and have relentlessly found practical solutions. I thank you for all your efforts. ”

**Nizamuddin**, Managing Director, [yourtravelshop.com](http://yourtravelshop.com)

# Create Awesome Quote and Invoice

You can create a variety of awesome Quote Templates using Travel Agency CRM. These quotes can then be instantly sent to your customers via email from within the CRM itself.

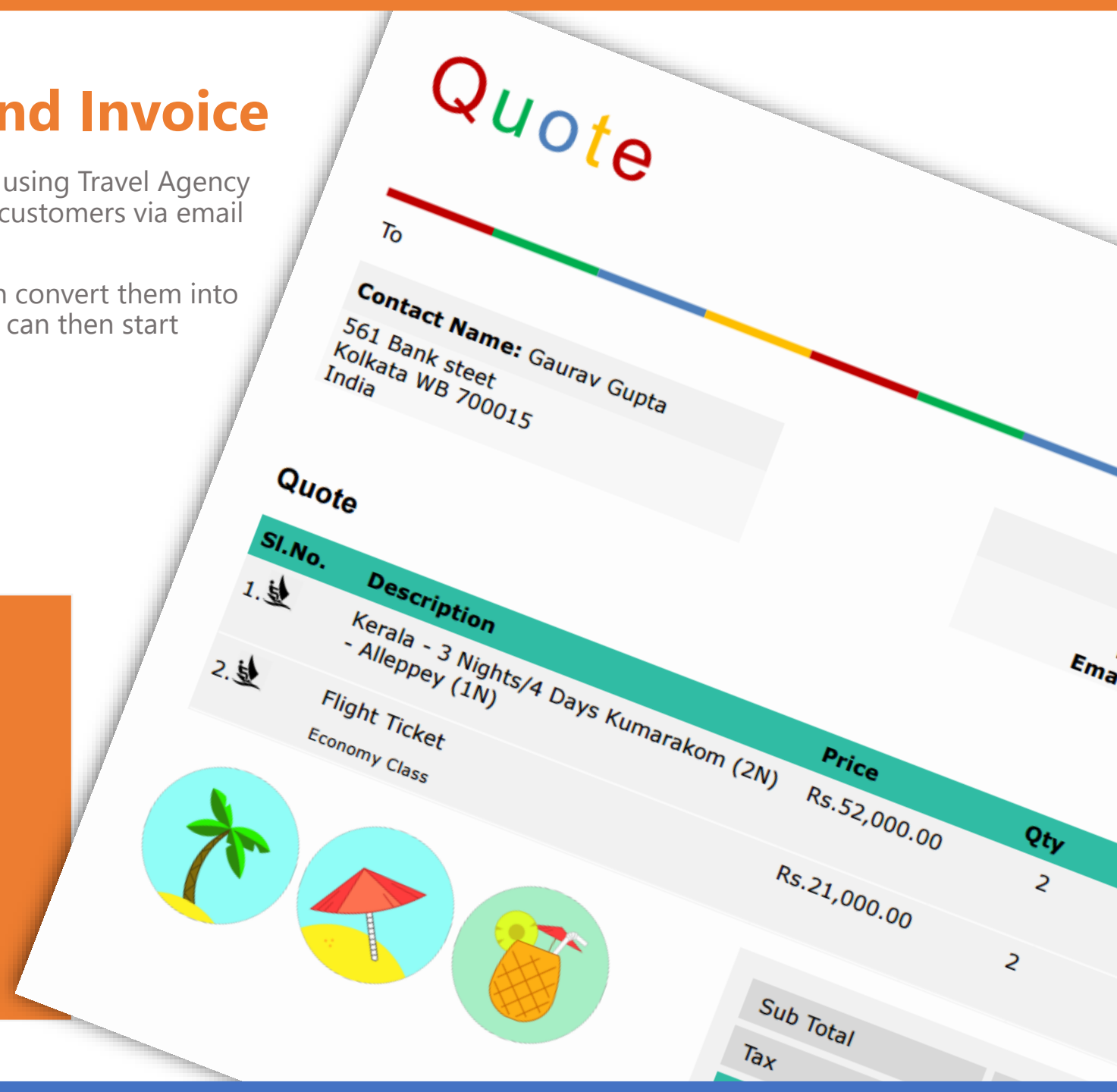
Once the quote is approved by your customer, you can convert them into Invoice in just one click Using Travel Agency CRM. You can then start recording the payment made by your customer.



*It has been absolute pleasure to work with Arnab and his team. The project was delivered on time and as per specifications. GoldenLion has exceeded my expectations in every way. I will be working with them again in future also"*

**Praveen Syal**

Managing Director, Indus Travels



# Create Vendor Reservations and Vouchers On the Fly

Conducting a successful trip requires interacting with multiple vendors and booking reservations with them. Be it transportation, accommodation, food or special activities, keeping track of all these reservations is one of the greatest challenges of running a travel agency.

← Hotel Booking for Nancy - Confirmed

**Vendor Reservation Information**

Vendor Reservation Owner: Arnab Bandyopadhyay

Vendor Name: Kerala Beach Resort

Reservation Start Date and Time: 25/07/2017 07:00 PM

Arrival Details: Due Date: 09/05/2017

Vendor Reservation No.: Reservation/275

Created By: Arnab Bandyopadhyay  
Mon, 8 May 2017 01:34 PM

Subject: Reservation Date: Reservation End Time: Departure Details: Status: Reservation Co No.: Modified By:

## Voucher



+91 33 65550365  
www.aptwave.com

### Client Service Cum Exchange Voucher

|                                  |                                     |                                   |                                           |
|----------------------------------|-------------------------------------|-----------------------------------|-------------------------------------------|
| <b>Voucher No:</b>               | 89788                               | <b>Date:</b>                      | 08/05/2017                                |
| <b>Guest Name:</b>               | Nancy Vallejo                       | <b>Vendor Name:</b>               | Kerala Beach Resort                       |
| <b>Vendor Address:</b>           | 21/A Camac Street, Kolkata, 712102  | <b>Tel: Email:</b>                | 04988454544<br>debraj@glionconsulting.com |
| <b>Check-In Date &amp; Time:</b> | 25/07/2017 07:00 PM                 | <b>Check-Out Date &amp; Time:</b> | 28/07/2017 07:00 PM                       |
| <b>Package Plan:</b>             | Accommodation   Kerala Beach Resort | <b>Reference/Bill No:</b>         | Reservation/275                           |

# Calculate Trip Profitability to Make Better Business Decision

Keeping in mind the customer payments and the various vendor payments that a travel agency has to take into consideration, calculating trip profitability is no easy task. Travel Agency CRM is built to address this problem, while taking any kind of guess work out of the system!

## FIT Details

Interested In

Kerala - 3 Nights/4 Days Kumarakom (2N) - Alleppey (1N)

Trip Start Date

14/03/2017

Trip Cost

Rs. 85,500.00

Destination

Kerala

Trip End Date

16/03/2017

Trip Profit

Rs. 136,500.00

## Fixed Departure Financials

Fixed Departure Revenue

Rs. 1,350,000.00

Fixed Departure Profit

Rs. 1,155,000.00

Fixed Departure Cost

Rs. 195,000.00



“ From hearing about GoldenLion's industry-focused product to reviewing it & rolling it out, I have been very impressed with Arnab & the whole GoldenLion team. Zoho for Travel Agency is the base which we have used to build so much more over the last 2 years. I would definitely recommend them for any of your industry-specific needs. ”

**Julien Perreard**, Group Head of Digital and Online, Giltedge Travel

# Better Manage Contacts to Create Memorable Experiences

Creating exquisite experience is the end goal for every travel business. Travel Agency CRM makes this goal attainable with its advanced contact management feature. The system makes it super-easy for you to tag your contacts as 'Primary Contact' or 'Guest' and to update their contact details.

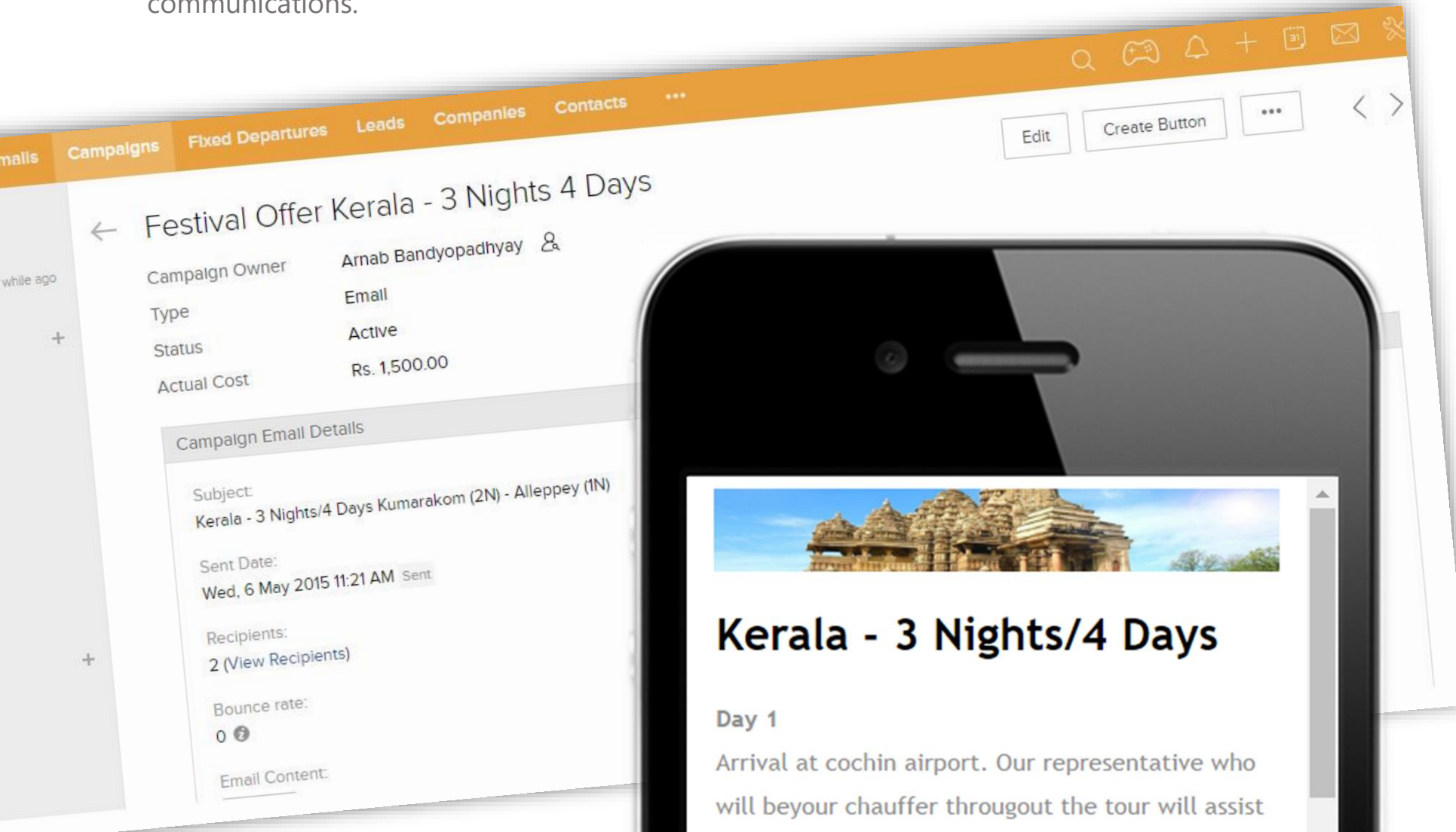
|                                                                                   |                                                                                                       |
|-----------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------|
|  | <b>Nirmal Bain</b>                                                                                    |
| Contact Owner                                                                     | Arnab Bandyopadhyay  |
| Email                                                                             | nbain@glionconsulting.com                                                                             |
| Phone                                                                             |  +91 33 25565644     |
| Mobile                                                                            |  (802) 367 5...      |

|                         |               |
|-------------------------|---------------|
| Name Tag                | Nirmal        |
| Date of Birth           | 09/04/1985    |
| Passport No.            | Z91279187     |
| Passport Date of Expiry | 19/04/2017    |
| Preferred Meal          | Diabetic Meal |

- ✓ Travel Agency CRM lets you record passengers against each trip.
- ✓ You can mark passengers as 'Primary Contact', 'Guest' or 'Primary Contact & Guest' to direct communications appropriately.
- ✓ The contact management module lets the passengers upload crucial data such as passport details, visa details, contact information etc. themselves; thus, ensures the accuracy of the data.

# Market Your Popular Destinations

As a travel agency, your goal is to compel your leads and existing customers to purchase more and purchase often. Travel Agency CRM helps you in this crucial function by appropriate segmentation of your contacts and approaching them with targeted communications.



When integrated with feature-rich ZOHO Campaigns, Travel Agency CRM lets you create and manage awesome e-mail and social-media campaigns right from the system.



"The team at GoldenLion have been very good to work with. They have been very attentive to my needs and been available at pretty much anytime to assist me" I am really not sure when they sleep!"



**Jason Webb**, Managing Director, Downunder Travel Ltd

# Managing Fixed Departure Was Never This Easy

Creating a Fixed Departure involves a number of activities and calls for minute management. Travel Agency CRM lets you manage every aspect of a Fixed Departure in a highly systematic manner. Starting from creating a Fixed Departure to Lead capturing, managing Trip, Passengers and Invoices till Vendor Reservations, the robust CRM system makes the entire process super-smooth.

The screenshot displays the 'Fixed Departures' section of a Travel Agency CRM. The interface includes a top navigation bar with various modules like Home, Feeds, Emails, Campaigns, Fixed Departures (active), Leads, Companies, Contacts, Trips, Passengers, Quotes, and Invoices. A left sidebar provides navigation options such as Info, Timeline, Related List, Notes, Attachments, Leads, Trips, Vendor Reservations, Open Activities, Closed Activities, and Links. The main content area shows details for a specific Fixed Departure: 'Vietnam Walking Dec 03 - Dec 11, 2017'. It includes a 'Send Email' button and 'Edit'/'Create Button' options. The details are organized into sections: 'Fixed Departure Information' (Owner, Name, Start Date, Capacity, Price, Modified By), 'Confirmed Guests' (Total No. of Guests), 'Confirmed Rooms' (Single, Triple, Double, Quad), and 'Parent Fixed Departure' (Location, End Date, Capacity, Balance Capacity, Created By). The interface is clean and modern, with a focus on providing comprehensive information for managing fixed departures.

**Fixed Departure Information**

|                                |                                                  |
|--------------------------------|--------------------------------------------------|
| Fixed Departure Owner          | Arnab Bandyopadhyay                              |
| Fixed Departure Name           | Vietnam Walking Dec 03 - Dec 11, 2017            |
| Fixed Departure Start Date     | 03/12/2017                                       |
| Fixed Departure Capacity (Pax) | 18                                               |
| Balance Capacity (Pax)         | 6                                                |
| Fixed Departure Price/Person   | Rs. 625,000.00                                   |
| Modified By                    | Arnab Bandyopadhyay<br>Mon, 15 May 2017 05:30 PM |

**Confirmed Guests**

|                     |    |
|---------------------|----|
| Total No. of Guests | 12 |
|---------------------|----|

**Confirmed Rooms**

|             |   |
|-------------|---|
| Single Room | 3 |
| Triple Room | 1 |
| Double Room | 2 |
| Quad Room   | 1 |

**Parent Fixed Departure**

|                                  |                                                 |
|----------------------------------|-------------------------------------------------|
| Parent Fixed Departure           | Vietnam Walking (9 Days/8 Nights)               |
| Location                         | Vietnam                                         |
| Fixed Departure End Date         | 11/12/2017                                      |
| Fixed Departure Capacity (Rooms) | 9                                               |
| Balance Capacity (Rooms)         | 1                                               |
| Created By                       | Arnab Bandyopadhyay<br>Tue, 2 Dec 2014 10:18 AM |

# Fit for Travel Agencies in Every Size: Small, Mid-Size or Large

No matter whether you are running a one-man show or operating a large travel agency, Travel Agency CRM is a perfect fit for you!

## Comprehensive Dashboards

Travel Agency CRM comes with 30+ Standard Dashboards and offers 40+ standard report on various modules such as leads, quotes, vendors, products, activities etc. **The reports and dashboards let you see the health of your business at a glance!**

## E-mails inside CRM

Travel Agency CRM lets you send, receive and view emails right from the system. You can send important notifications to your clients or team members and receive feedbacks from them without leaving your CRM page. **Reduce response time and enhance productivity by sending and receiving emails inside the CRM system!**

## Pre-Built Workflows

Travel Agency CRM is custom-built to fit the requirements of your travel business. Thus, the system comes with 25+ awesome workflow rules across fixed departures, leads, contacts, trips, quotes, invoices and vendor reservations modules. You can of course create your own rules. **Make your life easier with 25+ pre-built workflow rules across various modules!**

## User Access Rights

Travel Agency CRM provides you with a wide variety of options for user rights and data sharing via users, roles, profiles, groups, data sharing rules, fields and links permissions. **With the highly-advanced user access rights you can determine who can do what!**

## Robust Integration Framework

Travel Agency CRM allows seamless integration with a number of other applications such as Zoho Campaigns, Zoho Survey, Zoho SalesIQ, Zoho Creator, Zoho Reports, MS Office, Google Apps, MailChimp, PandaDoc, Twilio, RingCentral, Ringio and more. **With so many integration options available, you'll never get stuck while expanding your business!**



"It has been a true pleasure working with the team at GoldenLion Not only for the professionalism but even more so for their caring and openness to new ideas. They feel like part of our team - which makes them a special partner!"



**Terry Suero**, Director of Development, Toca Travel

# Fabulous Facts About Travel Agency CRM

## Award Winning Solution Platform

Travel Agency CRM is built on award-winning Zoho CRM, trusted by more than 50,000 companies world-wide.

## No Lock-in Period Whatsoever

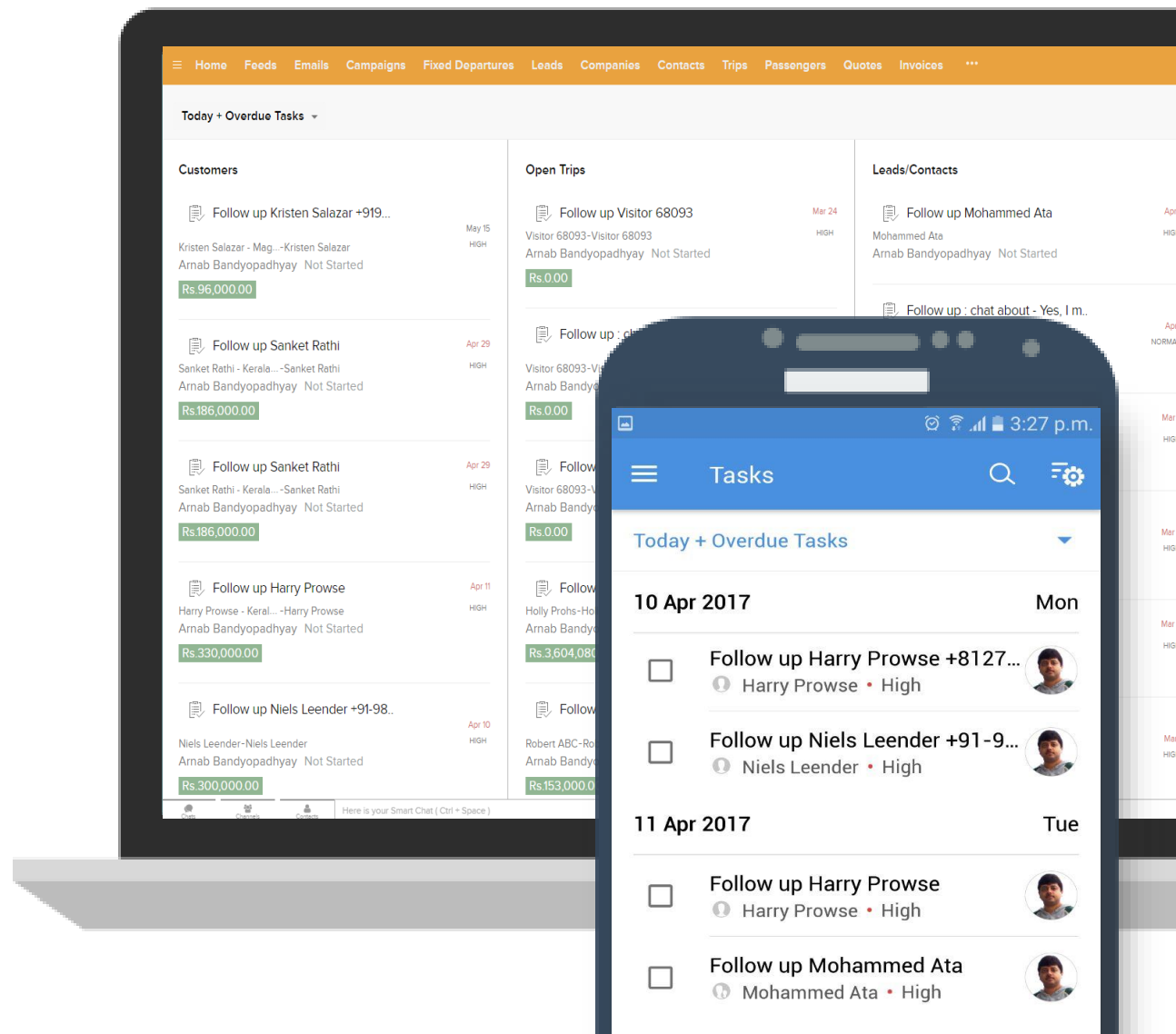
With Travel Agency CRM you are never locked into any long-term contracts. You pay monthly or yearly, whichever works the best for you.

## Everything is Hosted

You don't have to buy and maintain expensive servers, software or backup solutions. You can get started with just a browser.

## Customization Capabilities

You can further customize Travel Agency CRM to better suit your precise needs and keep it updated with the changing business requirements.



# Contact Us

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Kolkata 700136, INDIA



[www.glionconsulting.com](http://www.glionconsulting.com)



Thank you for your interest in **Travel Agency CRM**. We really appreciate your support and patronage. With all the customers we serve through our Industry CRM solutions built on Zoho, we have three goals:

1. To help awesome business owners like you
2. To establish long-term relationships
3. To have fun

Our goal in building **Travel Agency CRM** was to make it so helpful to you that you could save time and money in using this application and tell your friends to buy one.

Thank you for being awesome. Because of you and all our other valued customers, we have the opportunity to do what we love to do.  
Thank You!

**Arnab Bandyopadhyay**  
CEO, GoldenLion

**PS:** For a no-obligation Test Drive of Travel Agency CRM please send us an email at [zoho@glionconsulting.com](mailto:zoho@glionconsulting.com).

## About Us

GoldenLion is a Zoho Premium Partner with 250+ Customers in 30+ Countries. For more information about GoldenLion, please visit [www.glionconsulting.com](http://www.glionconsulting.com)