TutterflyCRM

Handbook

2020

What is CRM:

CRM the abbreviation stands for “Customer Relationship Management” and refers to all or any approach, techniques, tools, and technologies utilized by industries for retaining, acquiring, and delighting their customers. The concept has been around for ages, however, the methods of Customer Relationship Management have changed dramatically, it has taken a leap from Dairies to excel sheets and now it gets done through CRM software.

This software certifies that each step of the interactivity with consumers goes fluently and efficiently so as to expand the general profits. The software assembles customer data from multiple channels. Hence, CRM stocks thorough information on all-inclusive purchase history, personal info, and even purchasing behavior patterns.

Benefits of a CRM:

CRM comes with immense benefits. That can certainly enhance the productivity and efficiency of your team.

1- Enhanced relationship with customers - From lead to an opportunity, their expedition is monitored through the CRM. These details always put you in a better position to acknowledge people, their requirements, and how your business can assist them.

2- Lesser data entry – CRM automation lets you do less data entry, as through the website integration leads will land directly in the system. Spreadsheets require data entry; CRMs minimize it.

3-Better communication- CRM system allows employers to have a complete 360 view of the entire organisation; it becomes one single source of truth for every team member. No gaps in communication with the client, new representative learn the process quickly and start the communication with older client’s right from where the last representative had left it. No information gaps, no back-and-forth—the customer hears a consistent voice from your business.

4-Healthier pipelines- It is very important to have a visual of your pipeline since it makes prioritising your deals easy. Resulting in a clog-free and committed to the bottom pipeline.

5-Higher revenue- A well-rounded view of your customer’s life cycle enables the organisation to cross-sell and up-sell different products. That helps them to generate more revenue and build strong relationships with their clients.

What is TutterflyCRM:

TutterflyCRM is a leading SAAS solution for travel companies. It is dedicated business software for all kinds of travel agencies and operators. It offers a full suite of business tools which can be used to conduct smart business operations. Companies can streamline work processes, collaborate more effectively, and deliver better output overall through **TutterflyCRM.** This software makes selling things easy and making money a breeze. You can use this CRM to chart the dream success story for your business. It combines the best features of the most well-thought-out CRMs and optimizes them through quality app display and designing. This makes it the complete CRM solution that your business needs to get things done.

Technology:

TutterflyCRM is a technologically advanced business application created with many cutting-edge elements. For the front end, the developers have used AngularJS while the backend is based on PHP Laravel Framework. TutterflyCRM offers dedicated a database for each user and its Docker-based multi-tenant SaaS model offers complete isolation of data and user-based operations. The entire application runs on AWS (Amazon Web Services) environment managed through highly secured and scalable (automated load-balancer) cloud-architecture in co-located data-centers. To be noted that TutterflyCRM makes use of several AWS services to store, process, and serve data through TutterflyCRM.

Key features of TutterflyCRM:

1. Bulk Email Services- This function allows you to send mailers to your clients. this had never been this easy. Send up to 1000 emails in a day to your leads and B2B clients.

2. PulliT- Manage all your destination, point of interests in one place along with the processing time, and cost involved. This tab offers all the information about your destination such as airports, weather, currency, and even socket type.

3. Account Management - This is the primary feature you are going to use on TutterflyCRM to work on all your client accounts. This feature gives you access to your business collaborators and all the information you have on them. You can also save your B2C clients separately from your B2B clients and make lists and selections of what you want to view. This allows you to streamline your business and manage activities far more efficiently!.

4. Contact Management- TutterflyCRM Contacts feature enables us to maintain essential information on business relations. You can both access and restrict access to contact info on your clients from this tab. Discover a smarter way to manage contacts and use them for the best business growth!

5. Hierarchy Management- Manage your organization's hierarchy through customized Admin panel by defining roles and profiles to different users.

6. Lead Management- The Leads feature on TutterflyCRM has all that you need to get your Leads generation going full swing. It is equipped with all the key things you need to measure your leads and see how they will turn out. You can also sequence your leads generation and conversion according to your needs. Control access, stream work, and get yourself a big business!

7. Opportunity Management- Our Opportunities tab is where you will make the future of your business. You will achieve your business success but accessing, developing, and capitalizing on emergent options. Get your ambitions perfectly supported by our dedicated module. With a customizable interface and notifications function, you can now work better, faster, smarter!

8. Itinerary Management- Create multiple itineraries through this feature, An API-driven Module which enables you to send day-wise itineraries to your customers in a span of a few minutes.

9. Billing Management- This tab focuses on sending a proposal/quotation. Send quick quotations through Billing Management.

10. Task Management- The TutterflyCRM tasks module has been designed to deliver performance-enhancing functions. You can create, mark, upfloat, and resolve tasks with just a few clicks. The smart reminder combined with the daily work tab lets you get all your work done without missing a beat. Keeps your business booming with the right tool at your fingertips!

11. Report Management- The Reports module delivers higher-end functions for your top management. It develops complete reports by deriving performance-related information from the CRM. The semi-manual compilation feature allows for customization with optimization in the perfect way. Measure your activities, evolve your strategies, and achieve a better result for your business each time!

Drive Management- **Ever been juggling files and not know what is where? No more! Your travel business can blossom with our smart file management system. Store files, retrieve information, share and restrict access. You have complete control over your business data and you can sequence it as you like!**

Implementation:

Terminology:

Account- It is used to store information about a client or customer that you do business with.

Contact- Contacts are for storing personal or business information of individuals we do business with. Each account can have multiple contacts. Each has a name and contact details separate from their account. In TutterflyCRM, contacts can store phone number, email address, department name, birthday, lead source, account name, fax, title, etc.

Opportunity- When leads are profitable, they become an opportunity. It is not a business or a person but a future sale. It represents a transaction between a company and an account.

Personal Account- Person Accounts are the individuals who directly interact with our business to get tour packages without linking to any agency. We can also consider it as contacts in many situations.

Lead- It is a business record with the possibility of creating revenue. Once these leads get mature, we consider them as accounts and contacts. TutterflyCRM considers the lead's first name as a contact and the lead's source company as an account.

Call logging- It helps to record information from the telephonic conversation.

Task- A task is an assigned action that a user needs to complete. They are action items and reminders.

View- A view is a virtual table. It has both rows and columns. We can design it for security in a database. Views restrict the user from editing or deleting certain columns or rows.

List view- Allows visibility for filtered records such as contact, account, or custom objects.

Kanban view- The Kanban view displays a visual summary for a selection of records. By seeing all records at once, you can monitor your work.

User profile- Profiles define how users access records and related data and what they can do with the application. When a user gets created, TutterflyCRM assigns a profile to each.

Drive- It is an unlimited space in Cloud to save your data for decades.

Report- It is to generate reports on different modules.

Pullit- An API with multiple destinations and points of interest.

Setting Up Admin Panel:

After learning about all the concepts, the next step is to set up the admin panel. It is 100% customizable, and agencies can actually decide and design the workflow as per their requirements.

1. Picklist

These are drop-down menus that expand to give users different choices. They can select one and proceed to the next field. Each option is editable and can be deleted through the admin panel. The following are some picklist mentioned in the TutterflyCRM administration board:

A- Industry- This section can define a list of all the business categories available. TutterflyCRM asks this in 'Accounts' section at the time of adding a new account.

B- Salutation- This is initial verbiage that can uniquely identify a user. This option is available at the time of creating a new lead or contacts.

C- Lead Rating- This enlists different ratings of a lead based on the probability that it can turn into an opportunity. Each lead can have a numerical value to represent the level of interest a company has in your product and service.

D- Lead status- It will show the current status of a lead being converted to a closed-won opportunity. It displays different stages that a lead goes through in its lifecycle. It can be contacted, open, qualified, unqualified, closed.

E- Task Status- It displays the current status of a task. It can be urgent, high, medium, low, or normal.

F- Task Priorities- It is used to set the urgency with which a user needs to complete the task.

G- Opportunity Inclusions- Opportunity Inclusion represents a list of services that are included with a package.

H- Opportunity Experiences- This defines types of experiences that are provided as a part of a package. It can be an adventure, family, leisure or honeymoon, etc.

I- Opportunity Destination- This is a list of destinations that are the travel company deals in.

2- Sales Process

Sales Stages: - These are the different stages with which a sales lifecycle goes through, however, you can customize it as per your need.

A- Received Query- This is the first stage of a sales pipeline. This is the phase where an agent receives a query for your business.

B- Proposals- This is the stage where an agent sends a quotation to the end-customer.

C- Negotiations- This signifies opportunities that are undergoing some negotiations.

D- Closed Won - 'Closed-won' represents opportunities that have been successfully completed.

E- Closed Lost- An unsuccessful opportunity gets noted as closed lost.

3- User management

A. Users- It is used to add, edit, and delete users that will use the CRM.

B. Roles- It is used to define the hierarchy of the organizational structure.

C. Profiles- This section defines privileges that are assigned to each user.

4-Email Management

A- Email Templates:

An administrator designs a particular format to ensure consistent messaging and increase productivity. It is used to create personalised and customized emails for sending the same message repeatedly.

B- Email Footers:

Email footer is a common messaging technique used by an organization. It comprises of a few lines added at the bottom of the email after a signature. Users can apply email footers to all emails and save time.

5-Company Settings

A- Company Information:

This section displays details about your company; you can add your logo the currency you deal with along with your location.

6-Document Management

A- Performa Invoice/Itinerary Builder:

Through this, you can add the logo of your company for your itinerary and the Performa invoice along with the signature or company details as a footer.

7-Custom Field

A- Additional Field:

This section allows for adding extra custom fields to streamline your data management process. One can add extra fields in the Leads, Contacts, Opportunity, and Account module.

Getting started with TutterflyCRM:

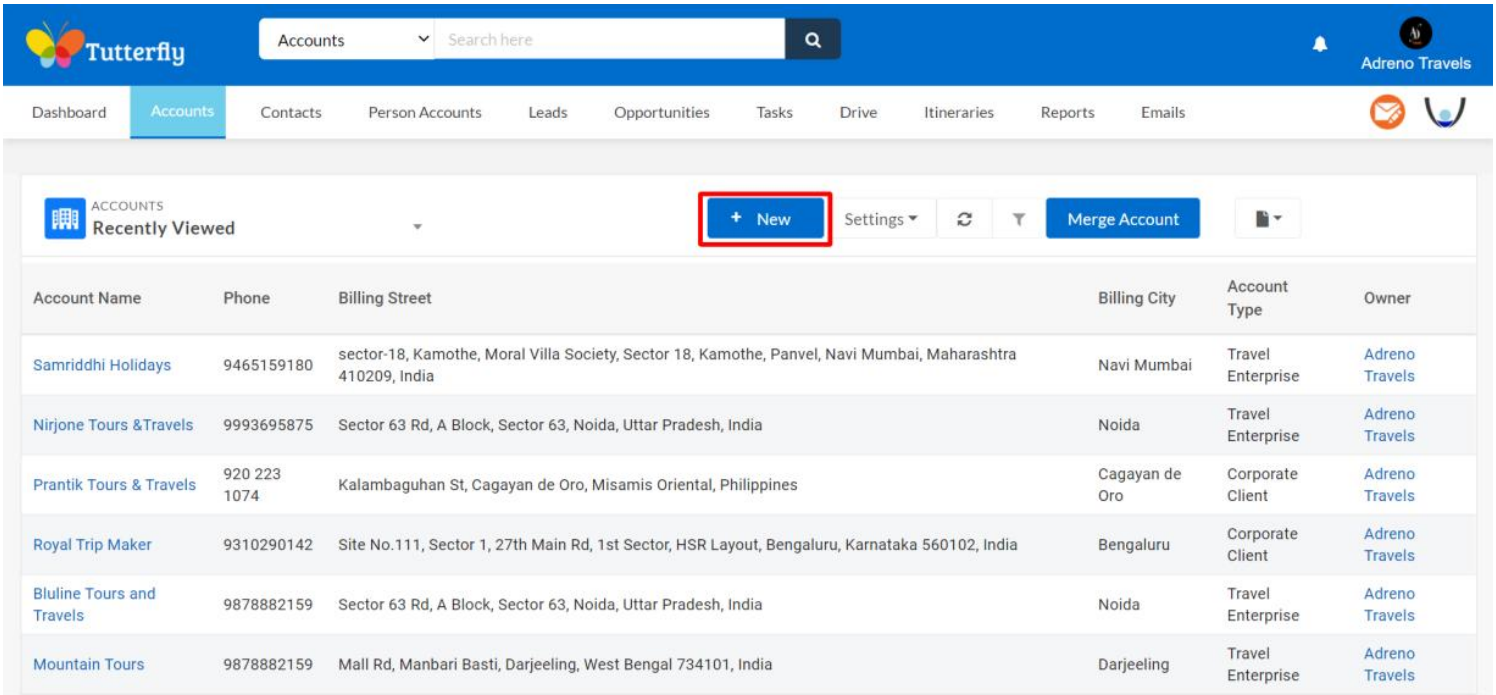
A step-wise guide and detail to every aspect of the entire module.

• How to Create an Account?

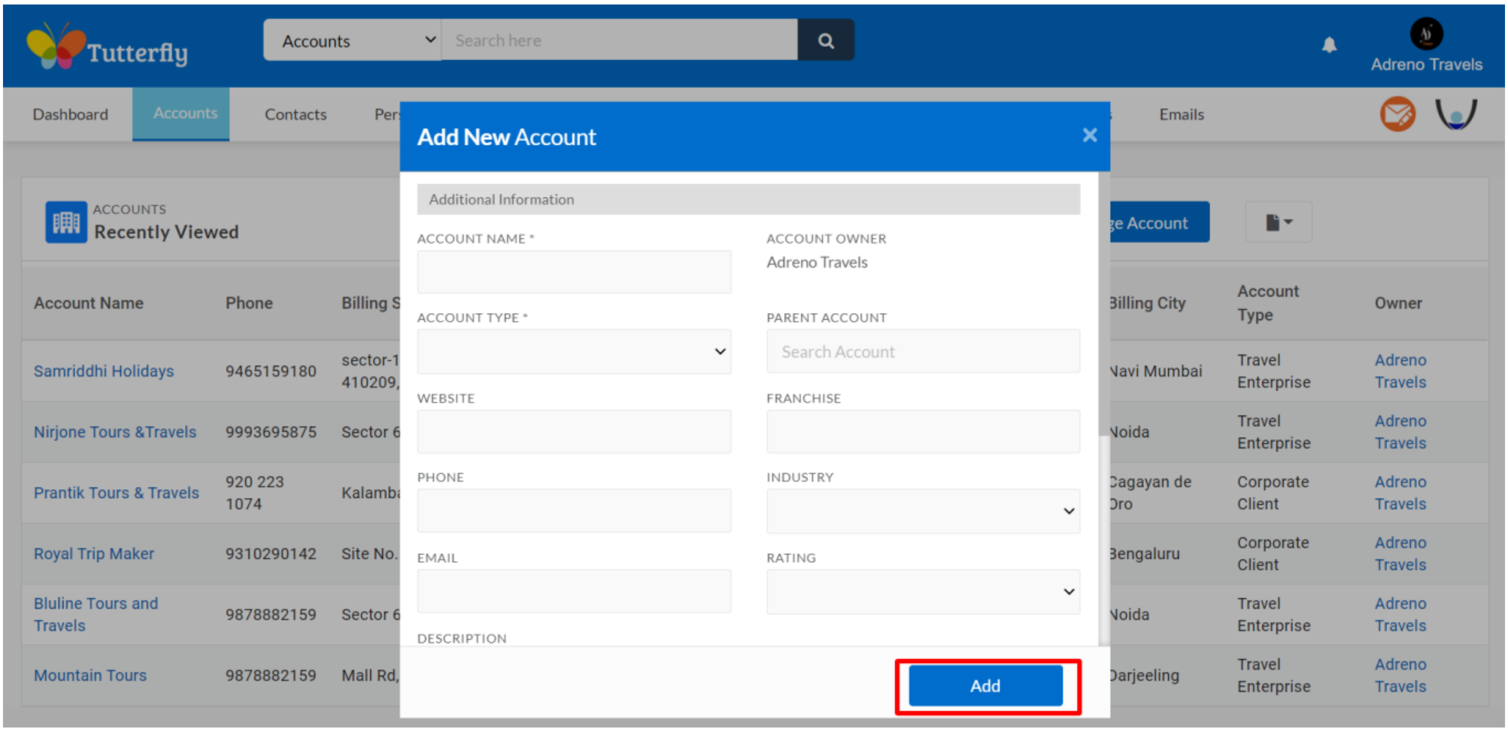
TutterflyCRM's accounts module allows you to handle thousands of records with ease! This is the primary module you'll be using to get big business for your agency. So, we've decided to make a step-wise guide and detail every aspect of this section. Let's get you started on the right note!

Create a New Account

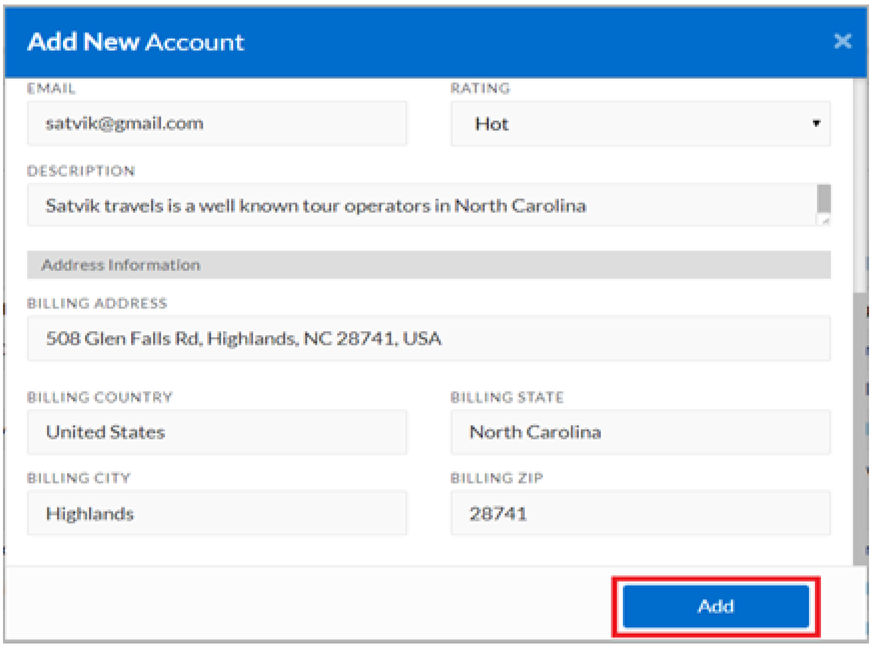
Step 1: To create a new account manually you can click on the **'+New'** button.



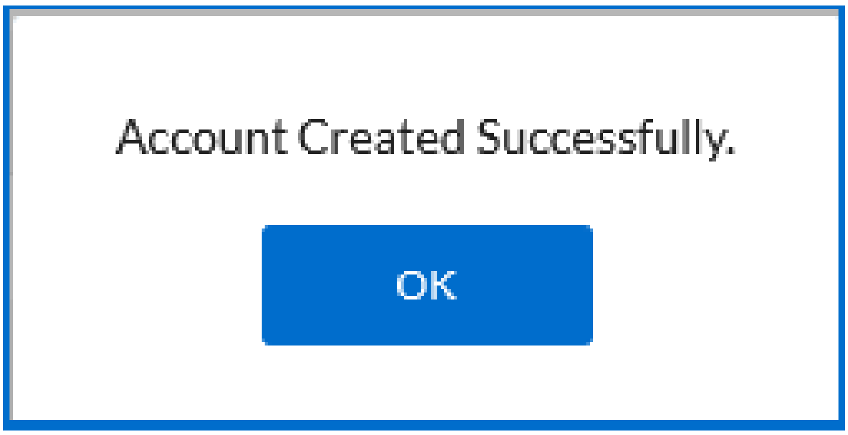
Step 2: This will display a window just like the image below:



Step 3: Fill in data needed to create a new account and just simply **click on Add.**



Note: The user must fill in the Account name and type as they are mandatory fields.



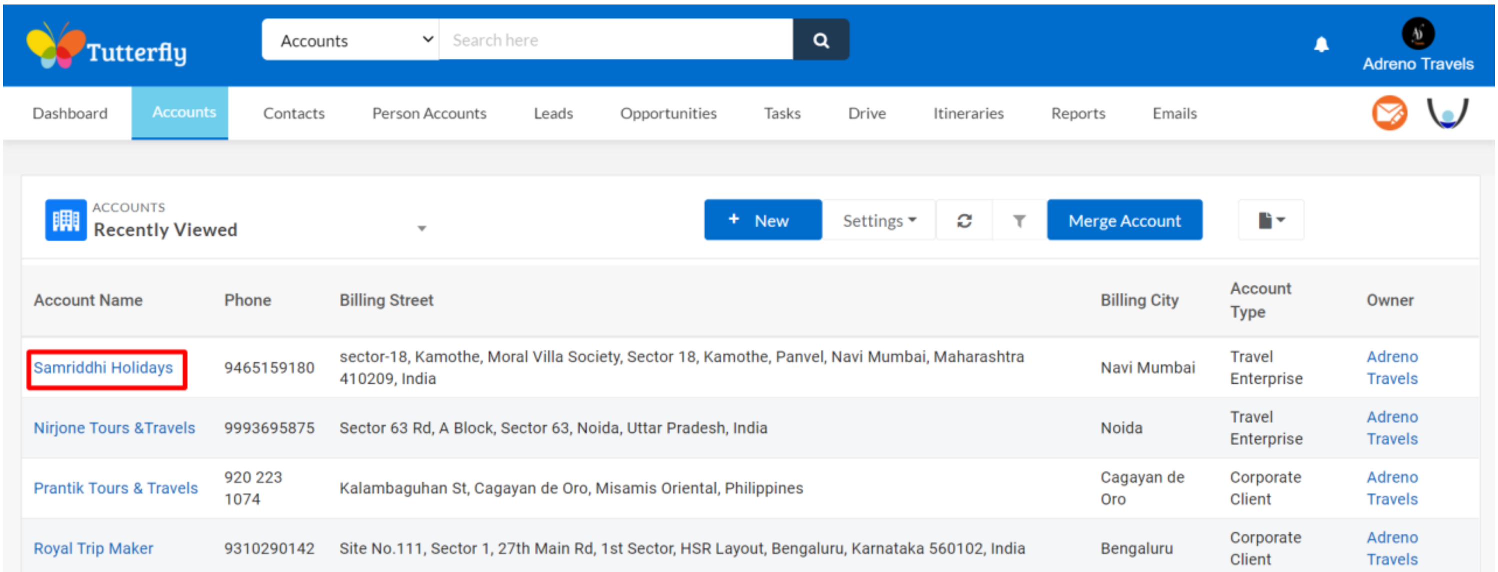
Congratulations! You have just created your first **TutterflyCRM** account! Now, click the **OK** button in the message box to proceed further.

• How to Edit an Account?

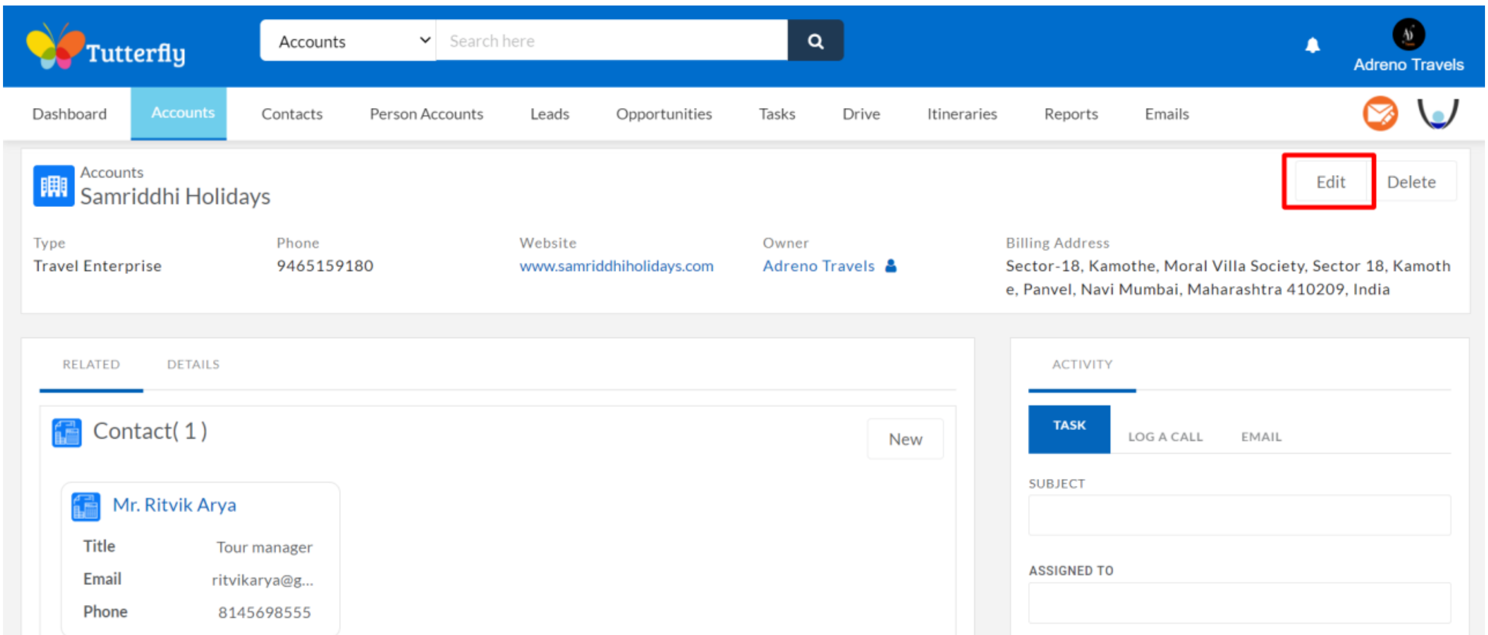
Sometimes you need to make changes to an existing account. TutterflyCRM has a simple and easy way to get this done! This page can help you understand how to make changes an Account record. Read on!

Editing an Account:

Step 1: Click on the link with the Account name. This will redirect you to a new page with more details.

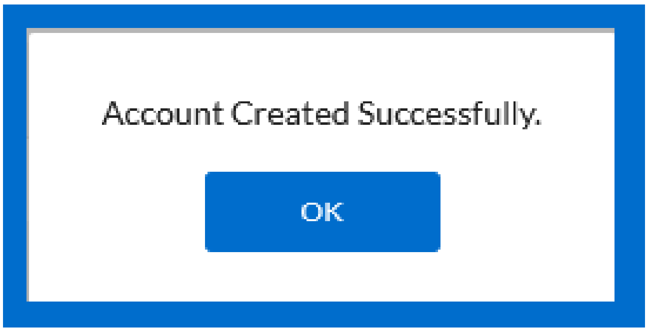


Step 2: From the new page, click on the Edit button from the top-right corner.



Step 3: Good Job! We are almost at the end. After you click the Edit button, a form will appear. From this you can make edits to any field necessary.

Note: When you write in something in the billing address field, you will get automatic suggestions. Make use of them!

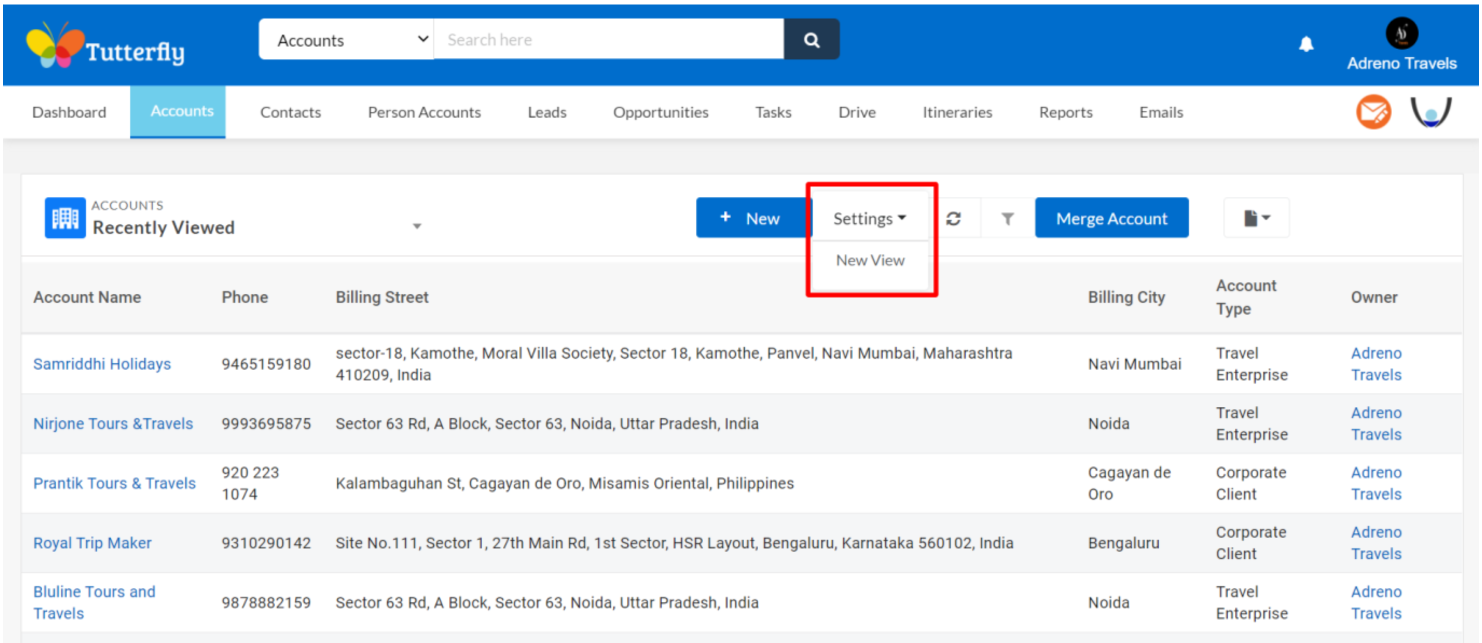


• How to Create and Manage Views in Accounts?

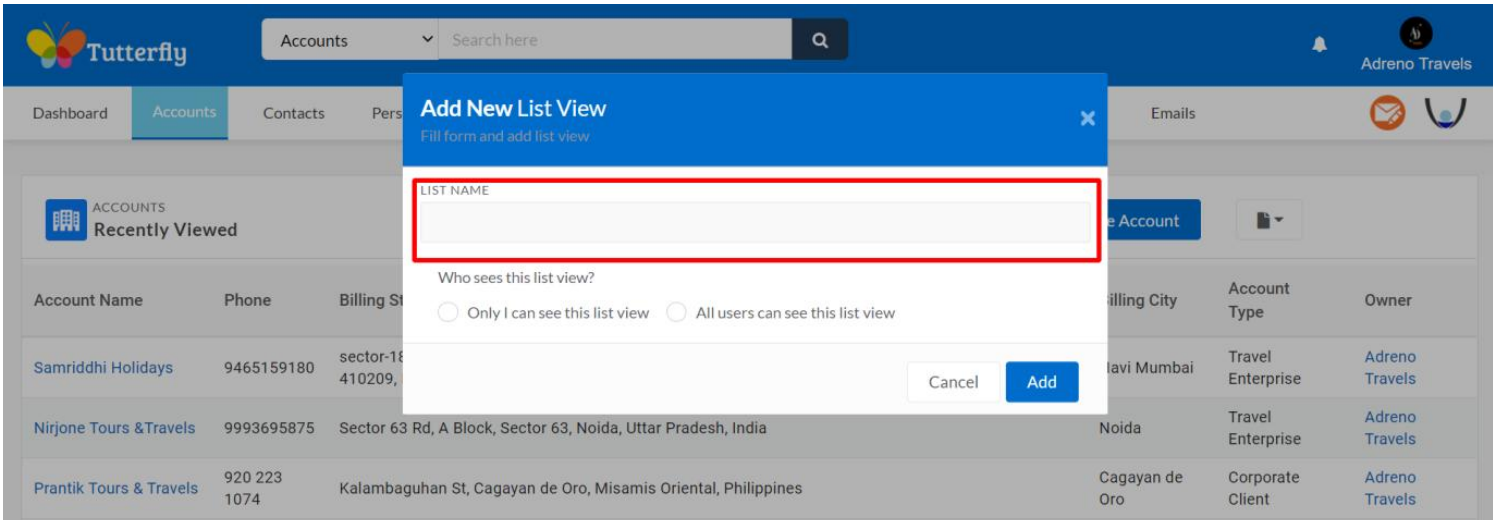
How to Create a View?

TutterflyCRM has been designed for efficient sales! Creating List Views is a key part of what makes this travel CRM a must-have for everyone. Here we're going to explain how you can create list views, segment your accounts and speed up the entire sales process! Let's start:

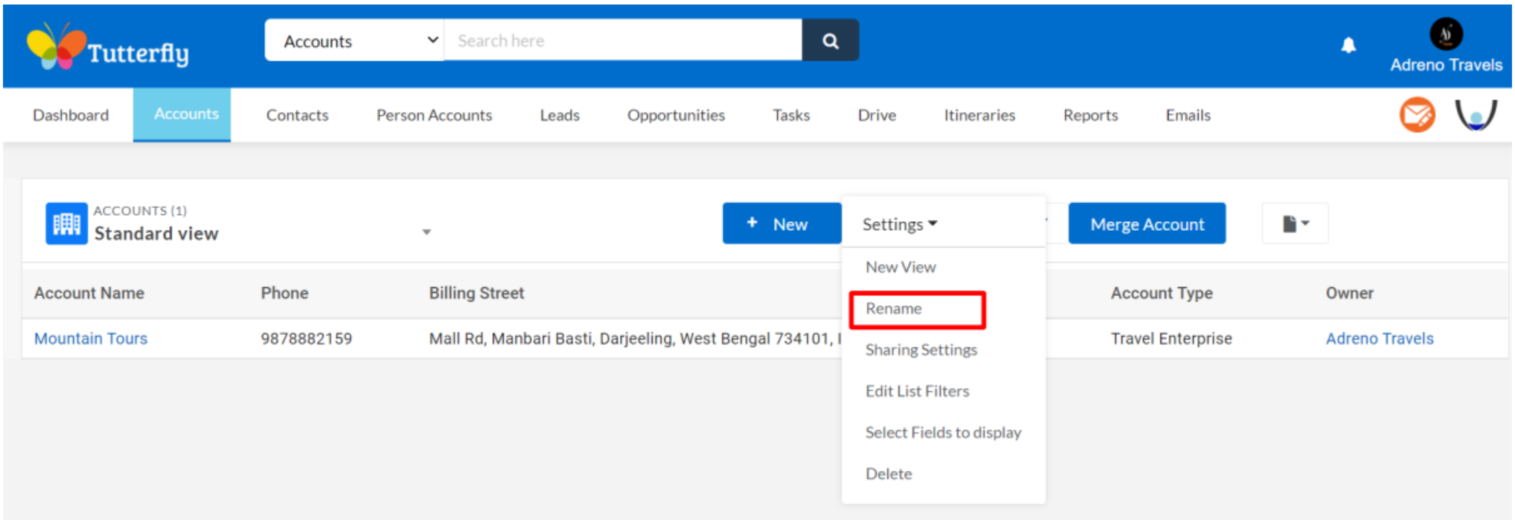
Step 1: Click on the **Settings >> New View.**



Step 2: From the **'Add New List-View'** box, type-in the **'List Name'** and click on the **'Add button'.**



Step 3: This is the last step! Your new View gets added to the list of Views displayed in the top-left corner. You can rename your view if you would like to.

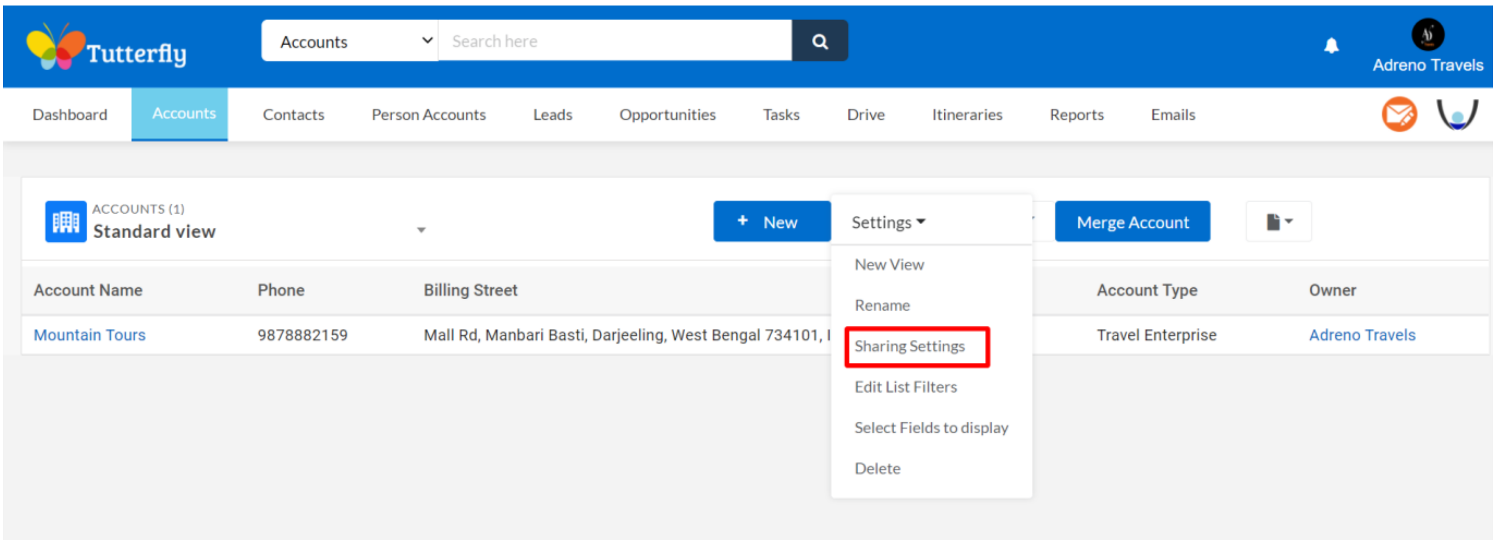


Step 3: The View will change and it will be reflected in the top-left corner.

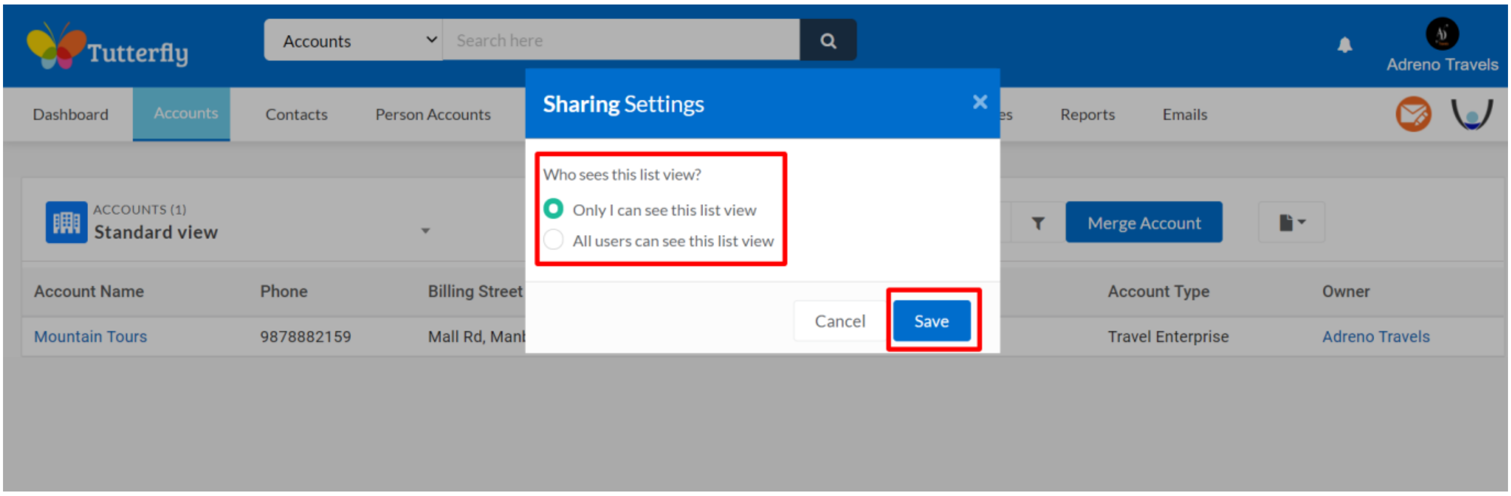
• Change the Sharing Setting

TutterflyCRM offers custom Data Sharing restriction settings. Learn how to apply them here:

Step 1: Go to **Settings >> Sharing Settings**. A box will appear like the one shown in this image below:



Step 2: From the **'Sharing Settings'** box, select the options to set the privacy level.

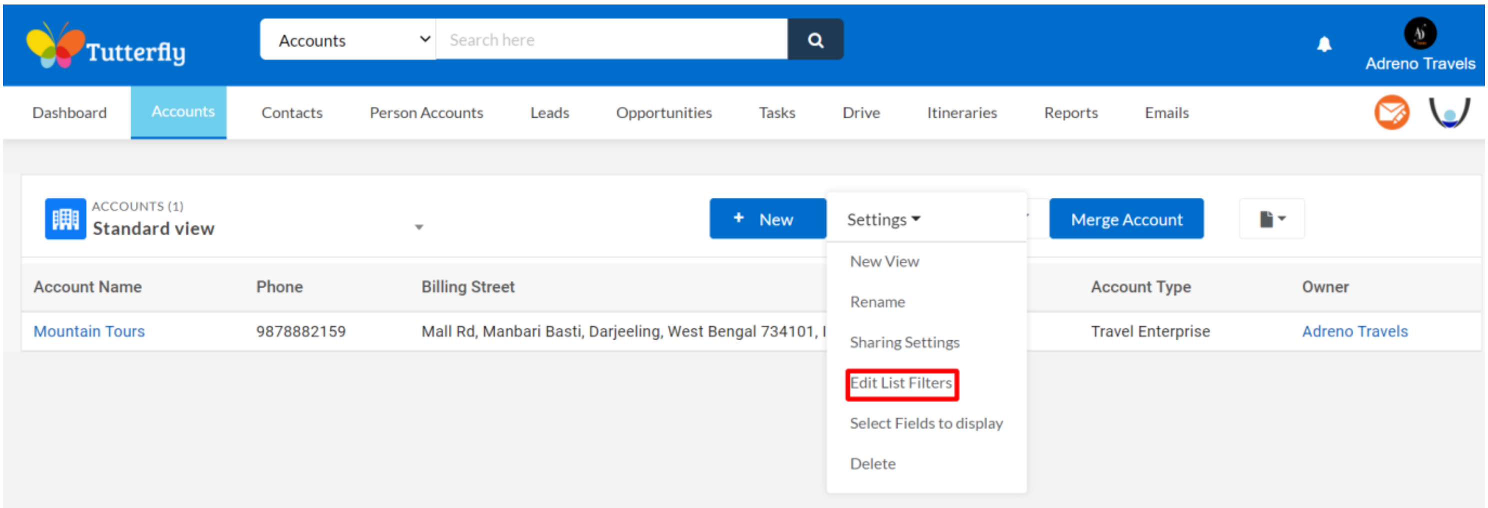


Step 3: Next, click on **'Save'** button.

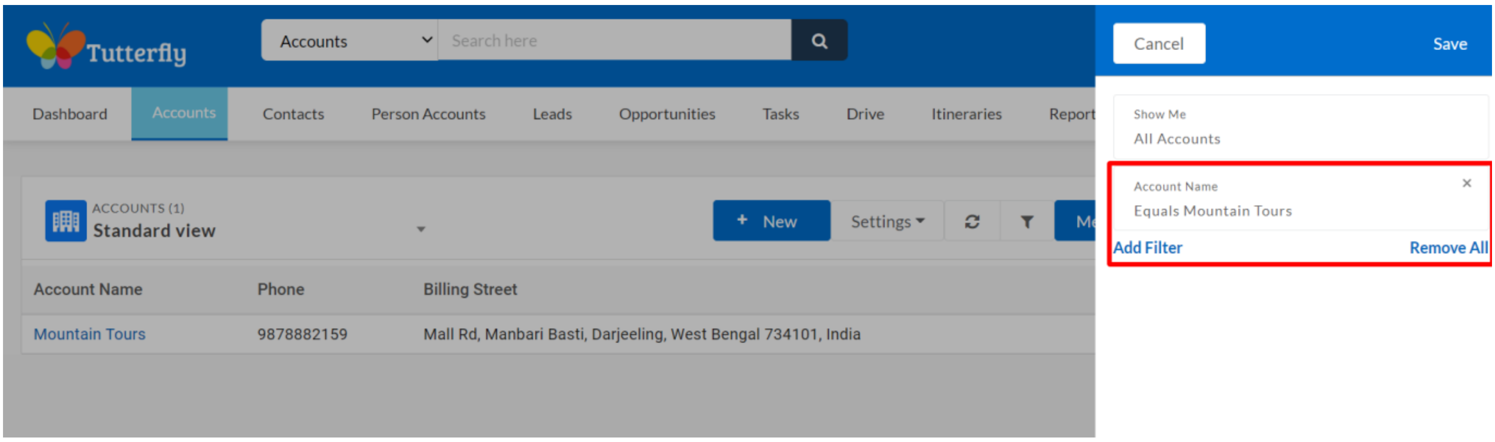
• Edit List Filters

Manage Your List Filters easily for the best work output. Find out how to change List filters here:

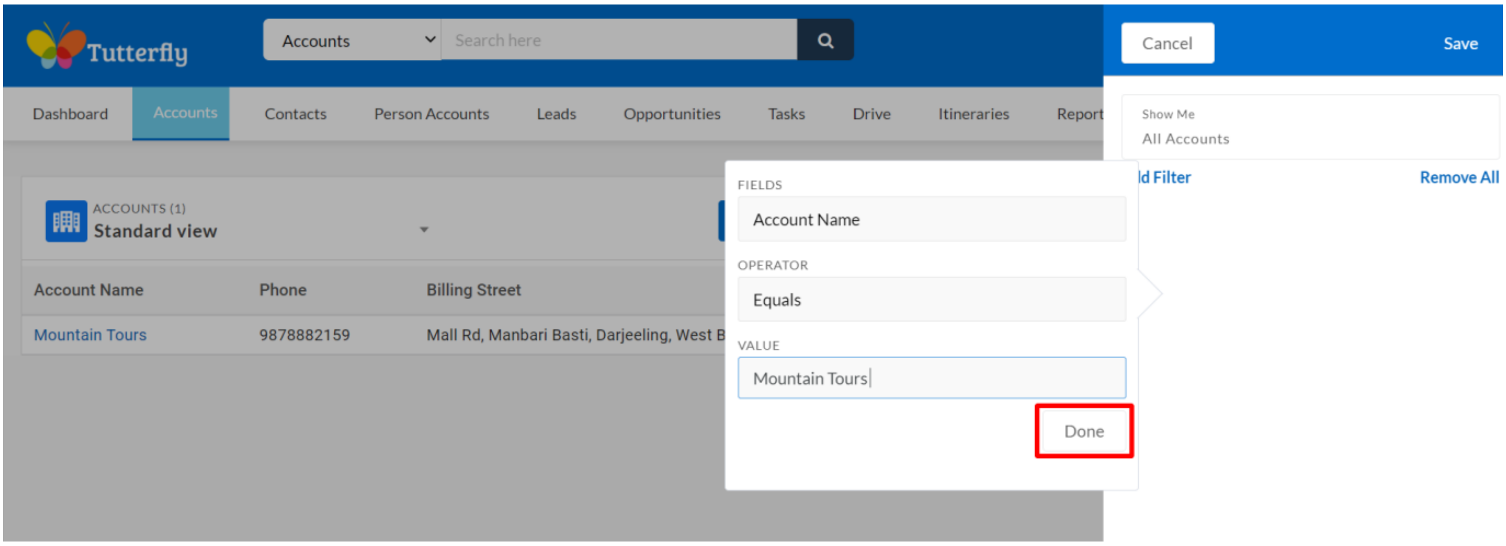
Step 1: Go to **'Settings'** and click on **'Edit List Filters'**. A pop-up will appear in the right-hand corner.



Step 2: Click on **'Add Filter'.**



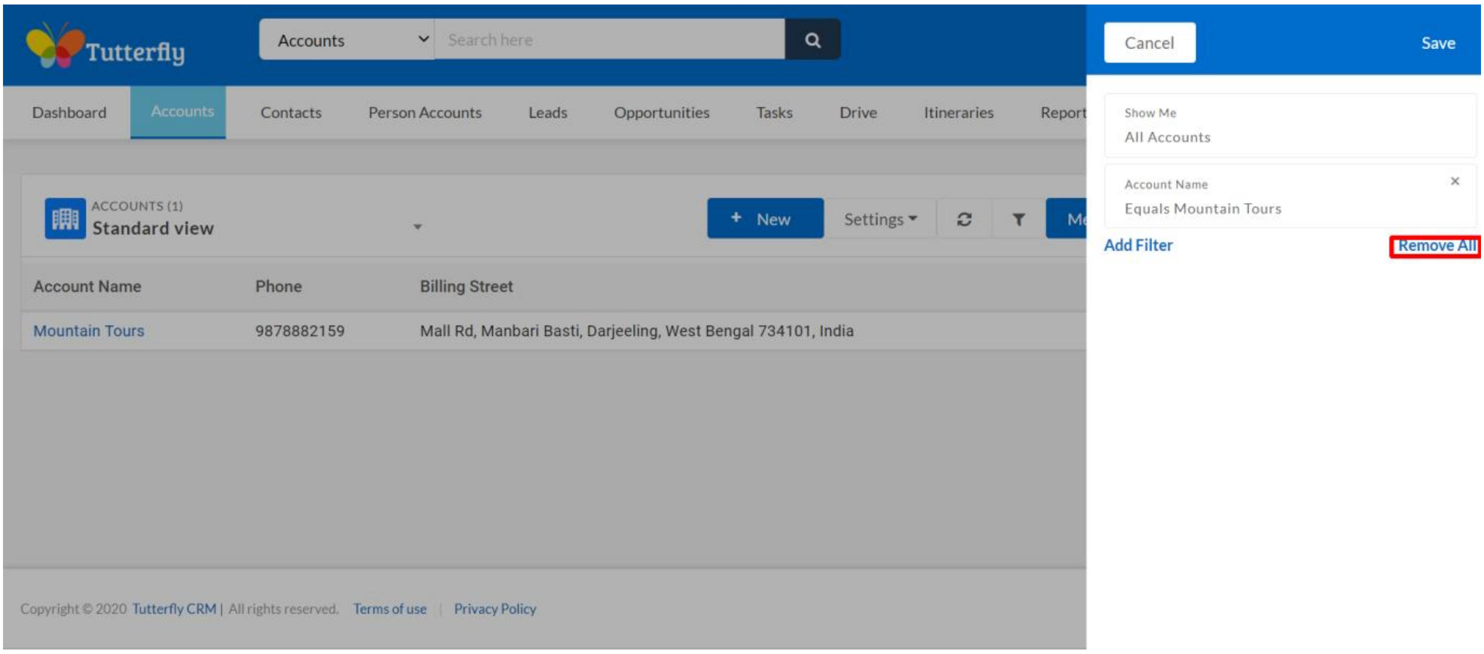
Step 3: and fill in details such as a Field, Operator, and Value. Enter the relevant details. Then, click on the 'Done' button.



Click on **Save**.

Remove an Existing Filter

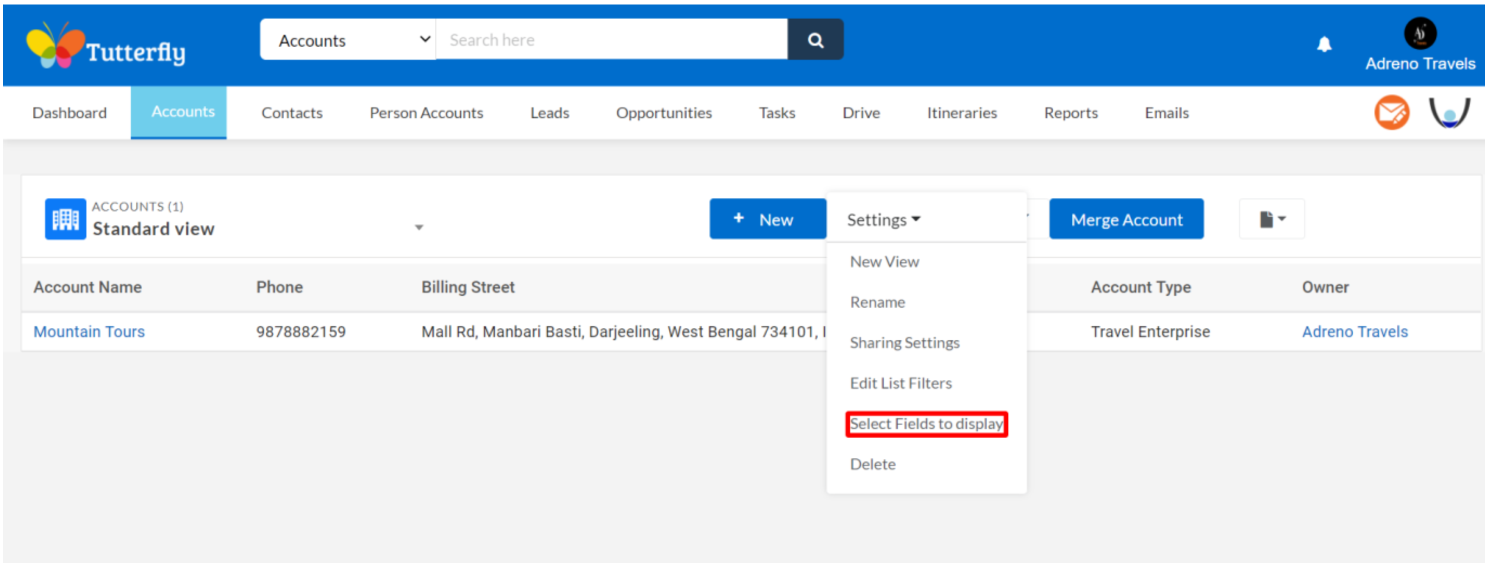
Want to delete an existing filter? Here are the steps to get this done.



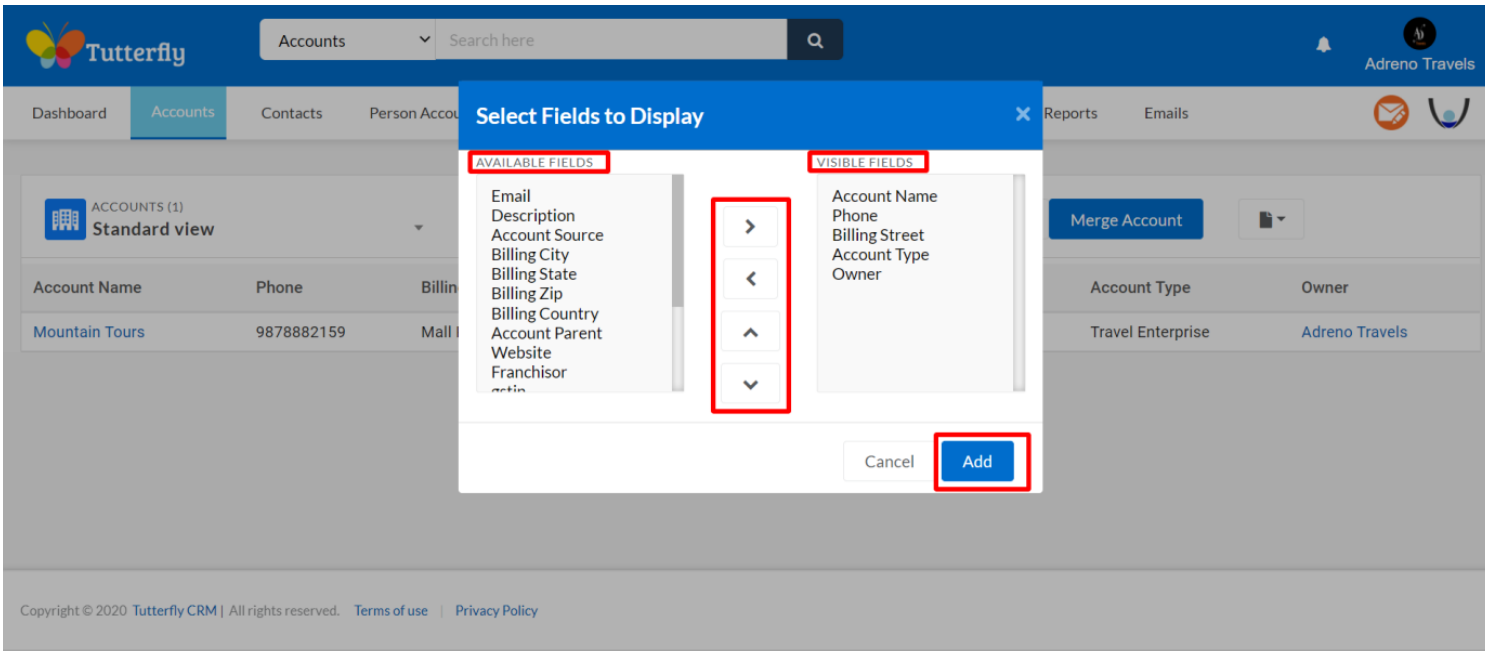
Select Fields to Display

Modify your View Fields Filter with these steps below:

Step 1: Click on **Settings** >> Select Fields to Display.



Step 2: From the **'Select Fields to Display'** box, a user can add or remove fields in a view. There are two sections: **'Available Fields'** and **'Visible Fields'.**

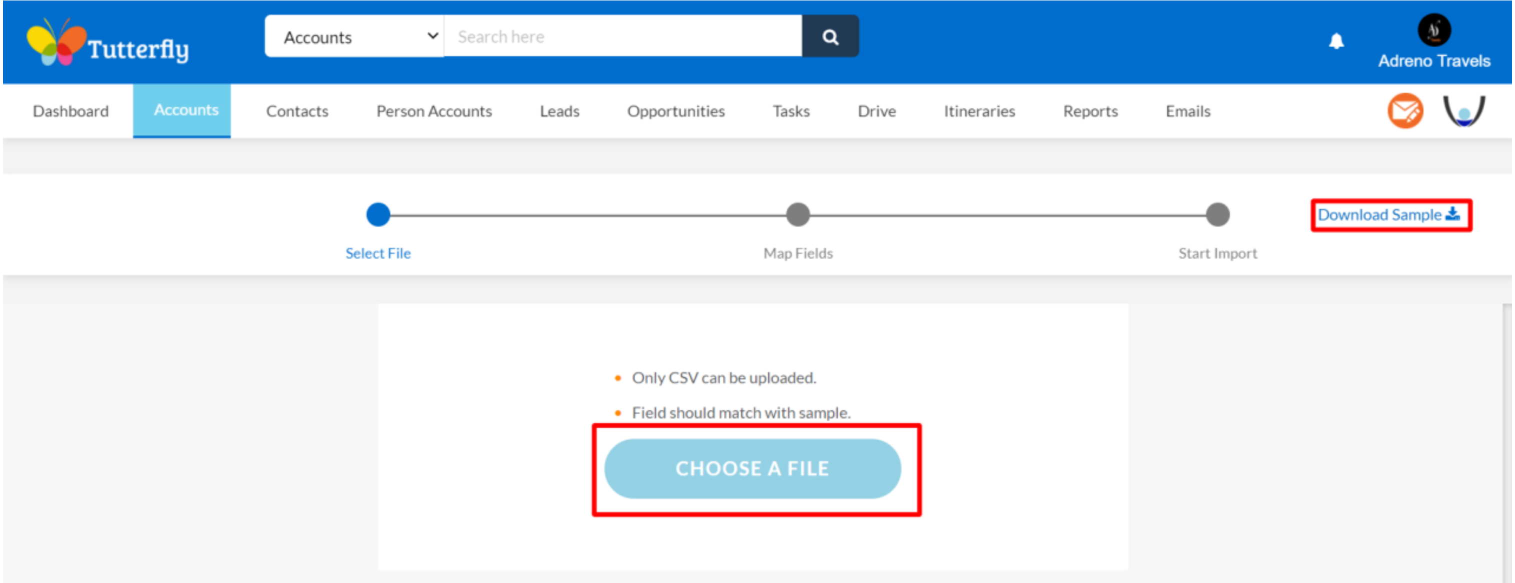


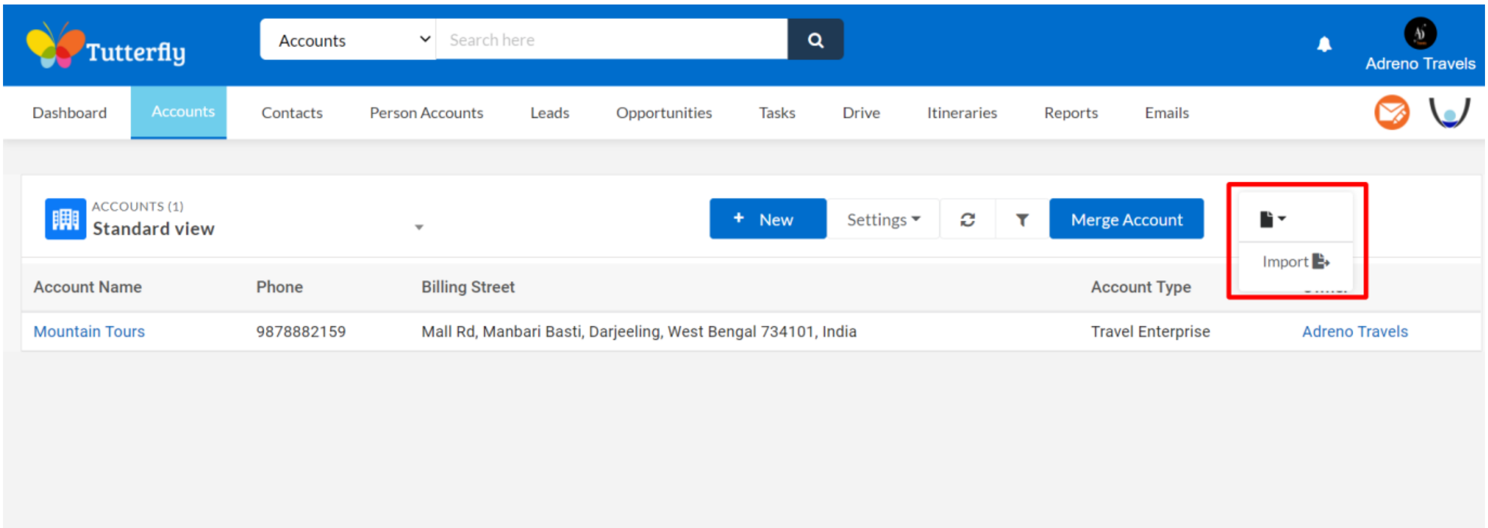
Step 3: We are just two steps away from finishing this off! To add an item, select column names and click on **'>'** symbol. To remove an item from visible fields, click on the **'<'** icon. Click on up arrow or down arrow symbol to change the order of column placement in the view.

Step 4: Hurray! you have reached the final steps to creating and managing Accounts. Now, click on the **'Add'** button to arrange columns in a proper manner.

Note: Default View cannot be changed but you can modify every other view you make!

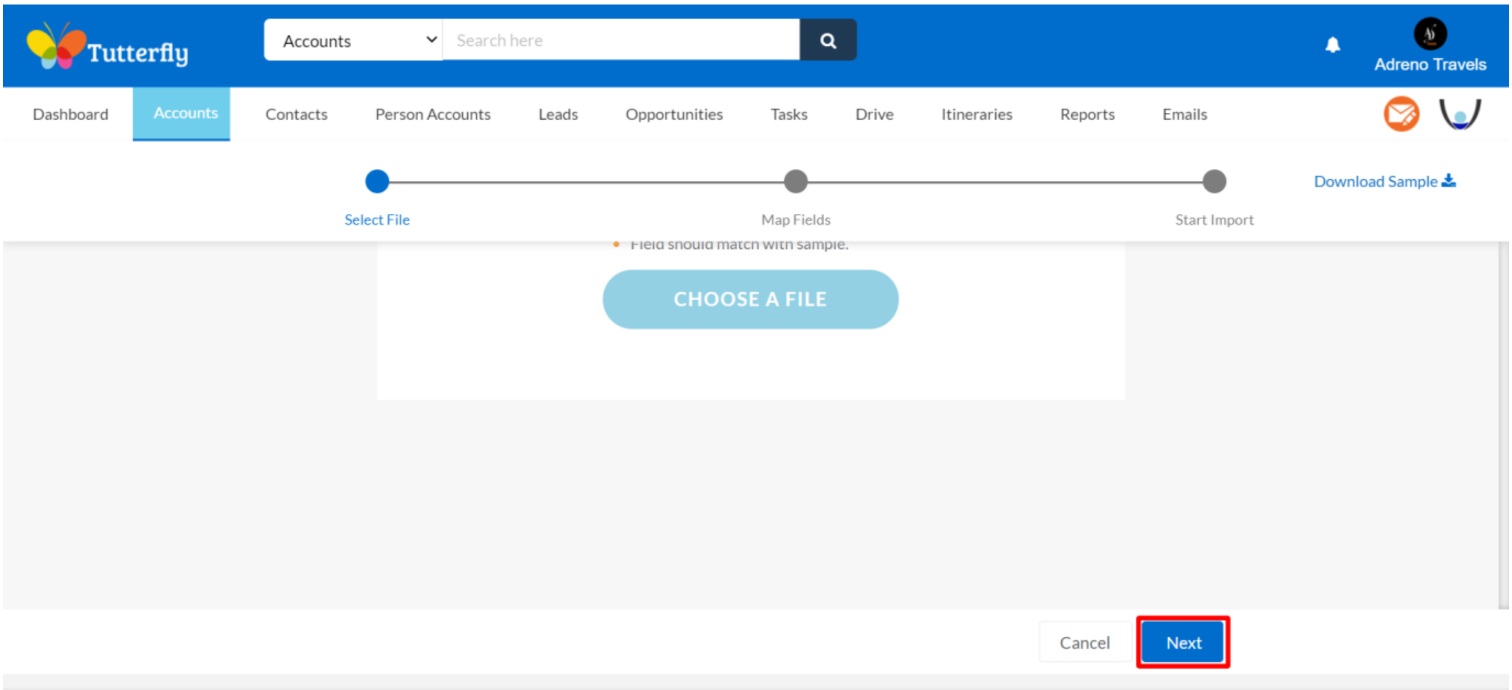
How to import your accounts:



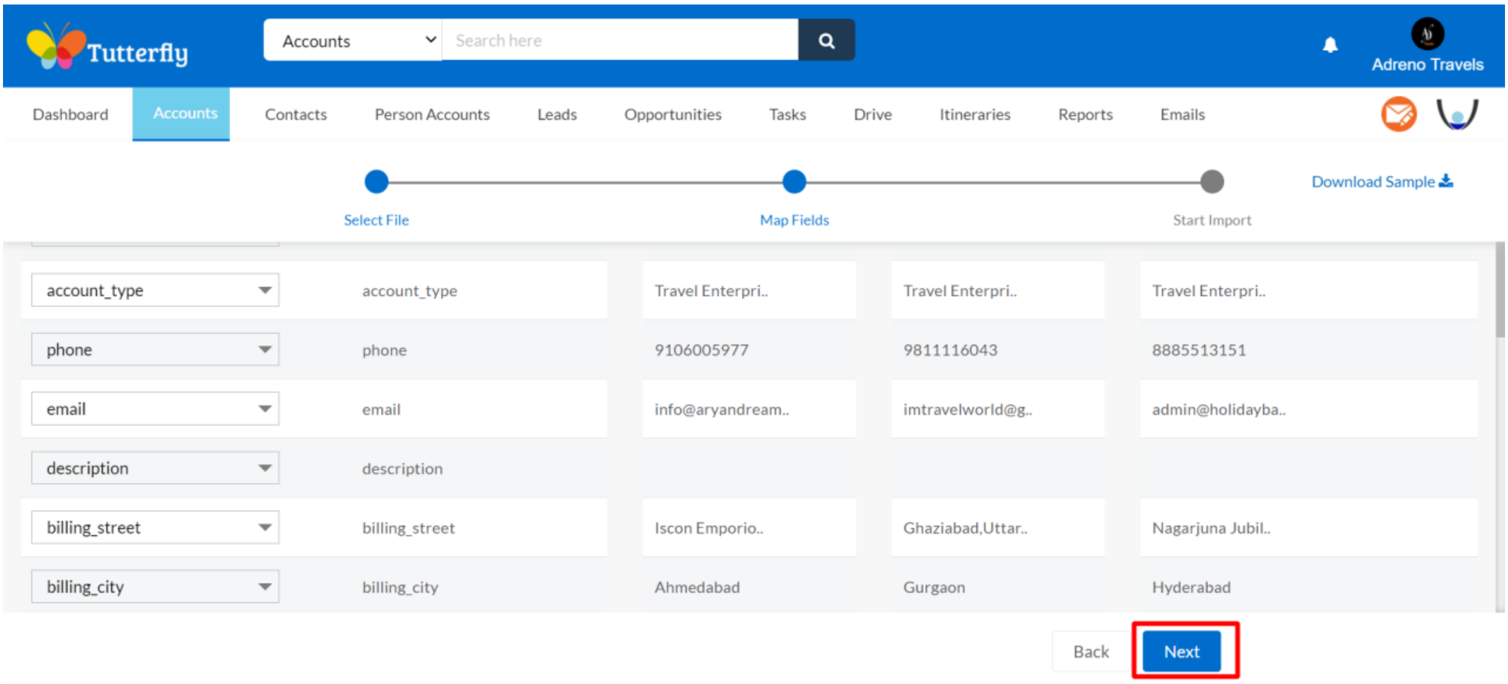


Step 2: Download the sample and save your excel sheet accordingly and save your data in CSV format. Click on choose file and select the file you want to import.

Step 3: Click on next.



Now your data will look like this:



Step 4: Click on next.

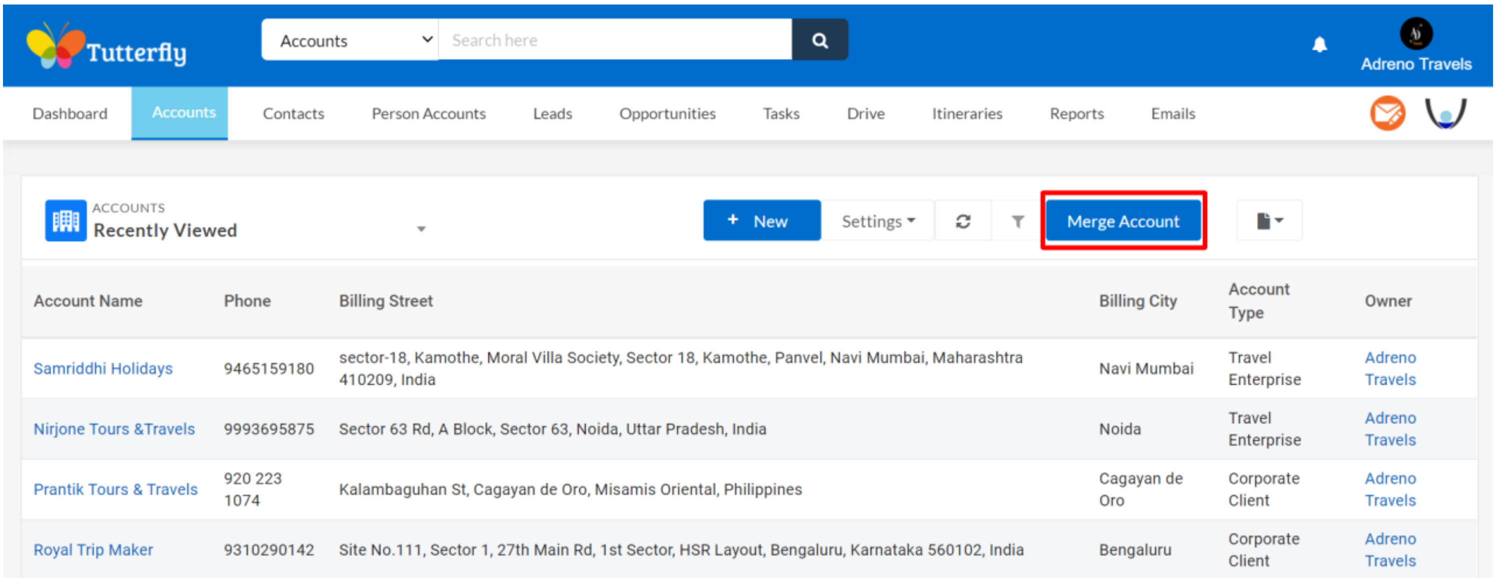
After clicking the screen below will pop up:

Step 5: Click on Import.

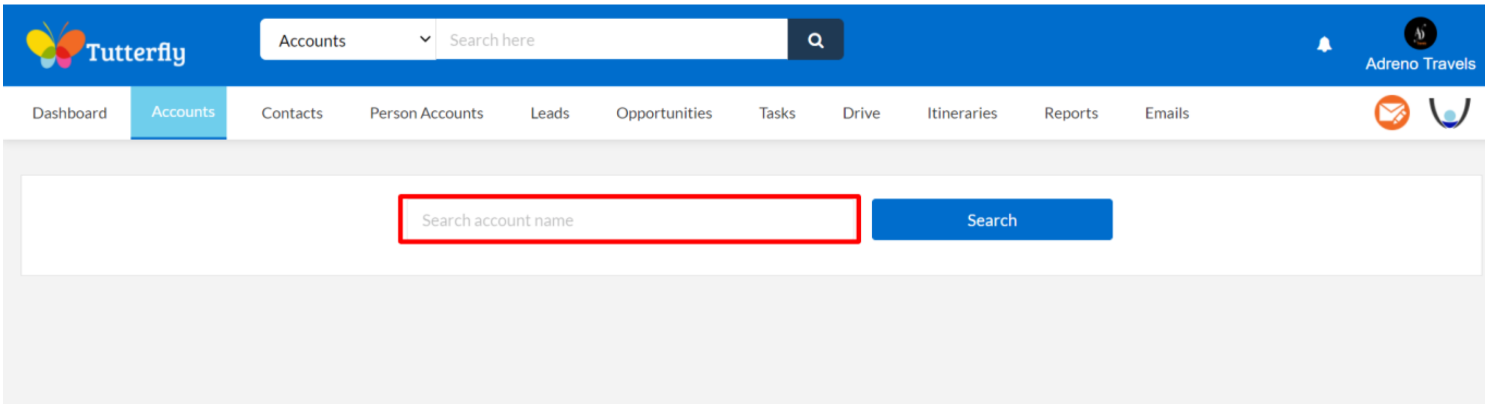
Your data has been imported in TFC.

• How to merge duplicate accounts:

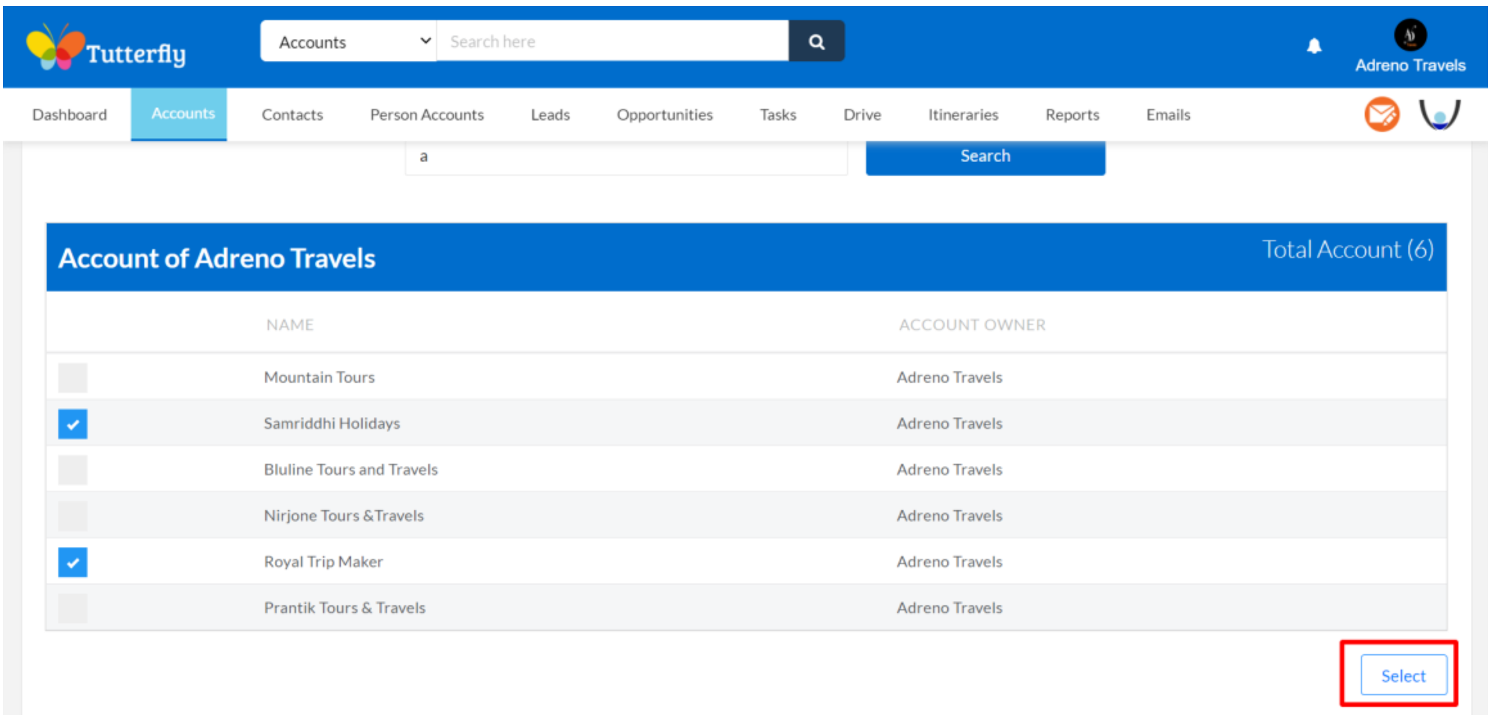
Step 1- Click on merge account.



Step 2: Search the duplicate account you want to merge:

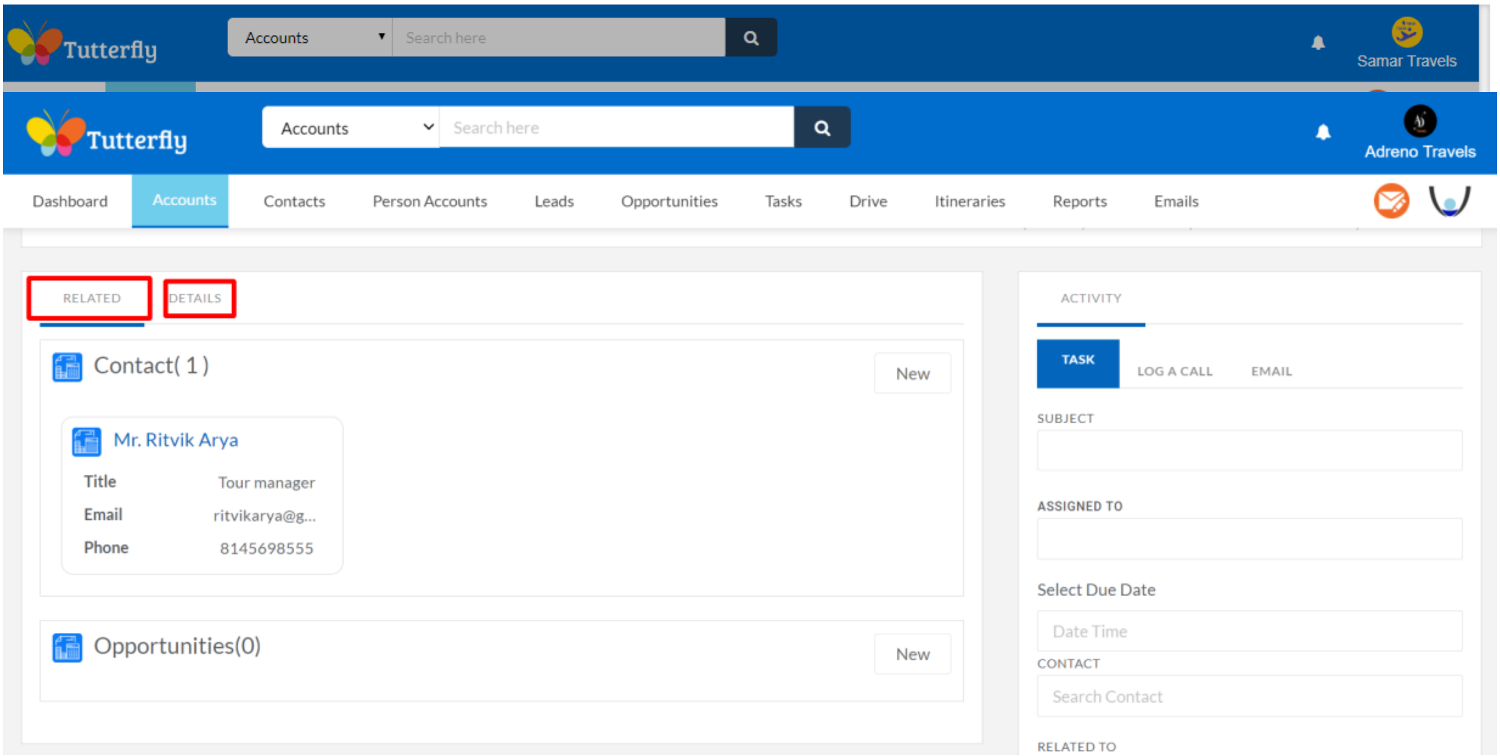


Step 3: After finding the accounts, click on select.



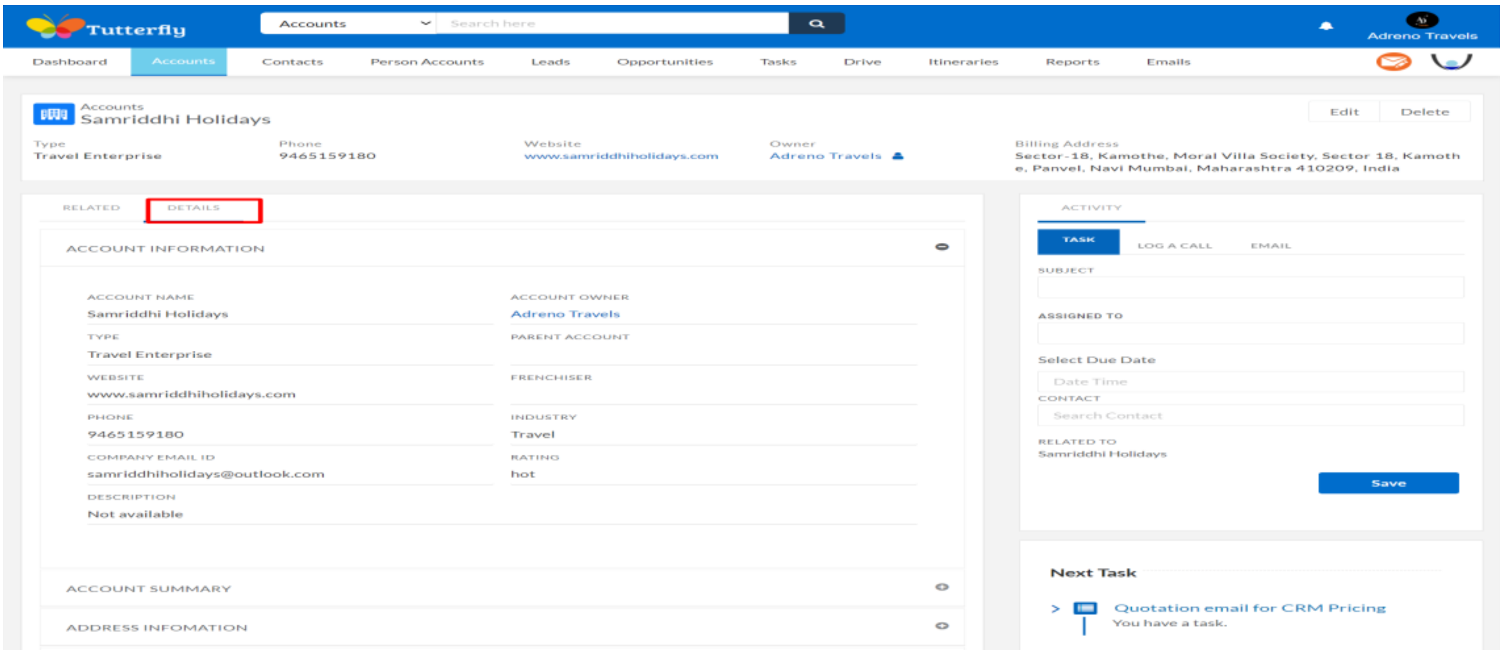
Step 4: Select the tabs you want to merge in different accounts and click on merge:

Now your accounts are merged.

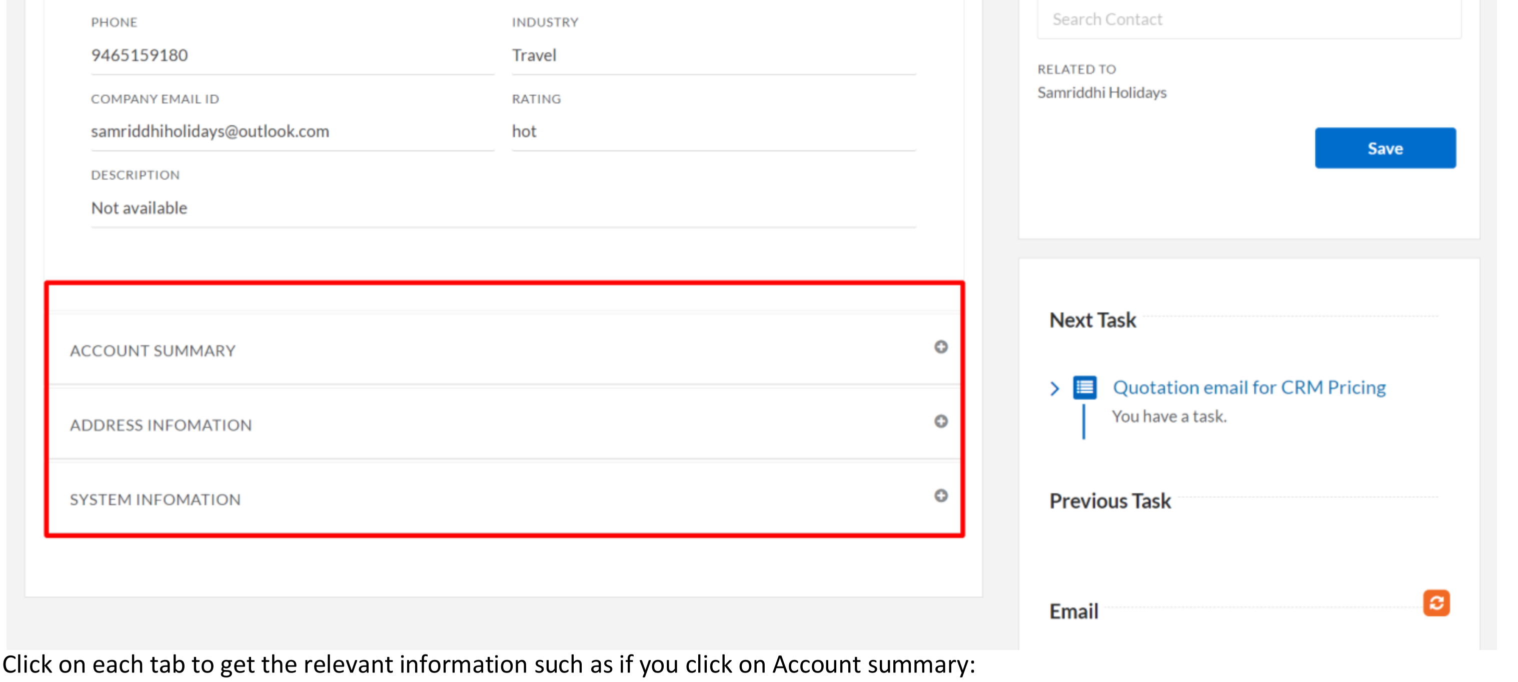


• How to view the account information:

Step 1: click on details section:

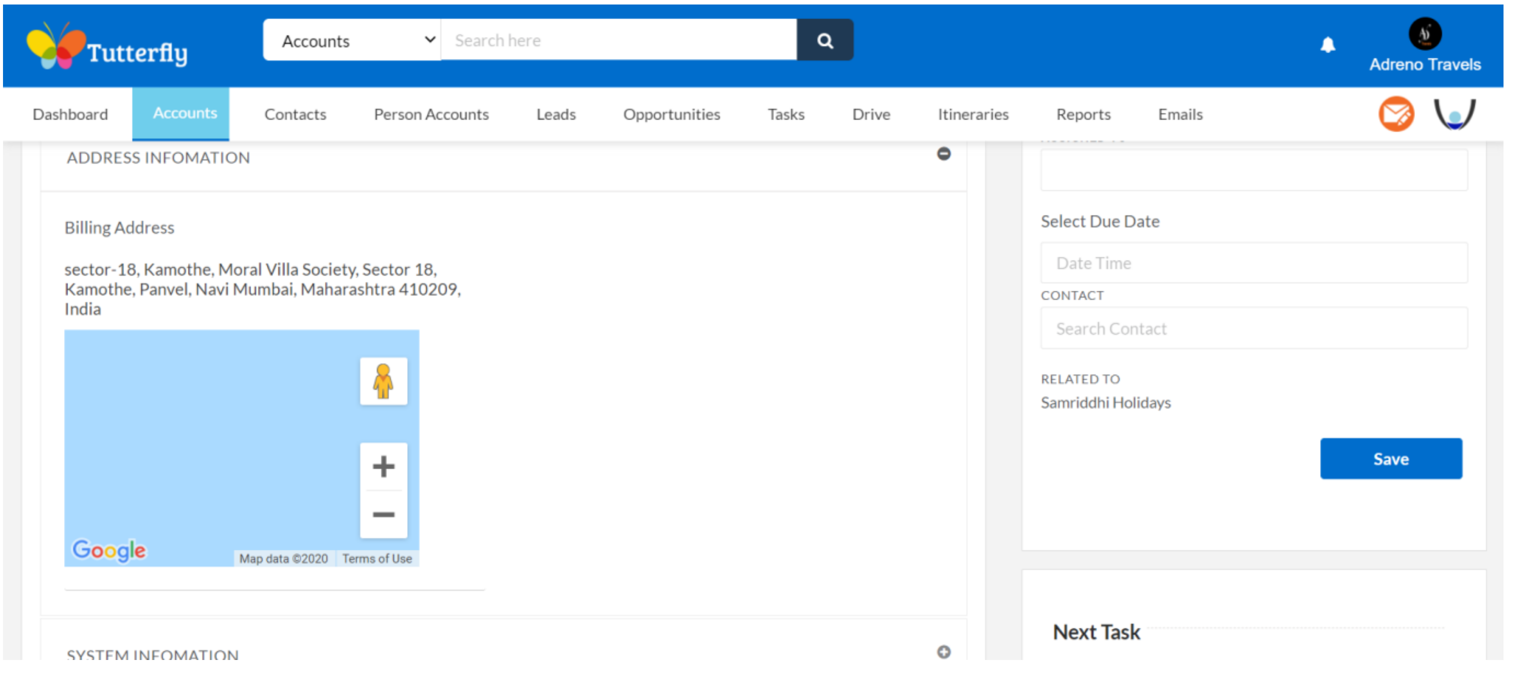


After clicking on details this screen will pop up:



Click on each tab to get the relevant information such as if you click on Account summary:

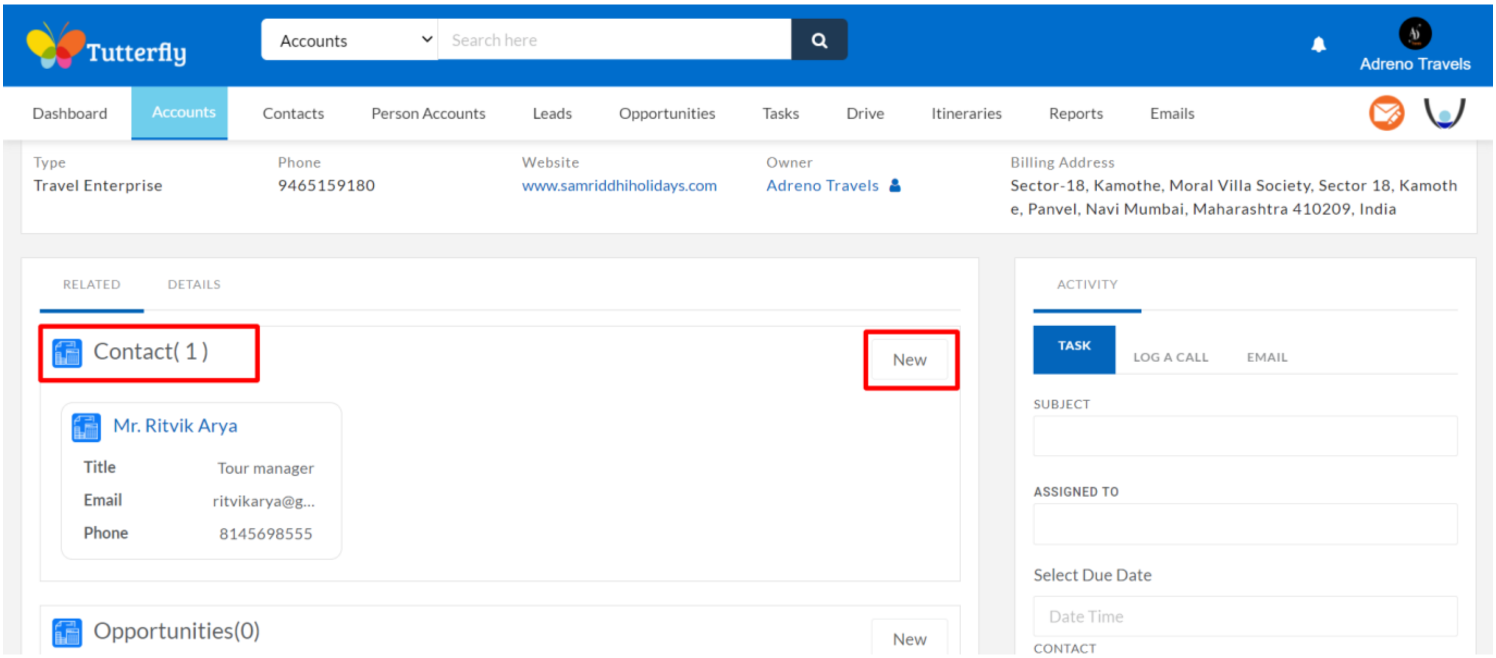
Or address information:



• View All Contacts

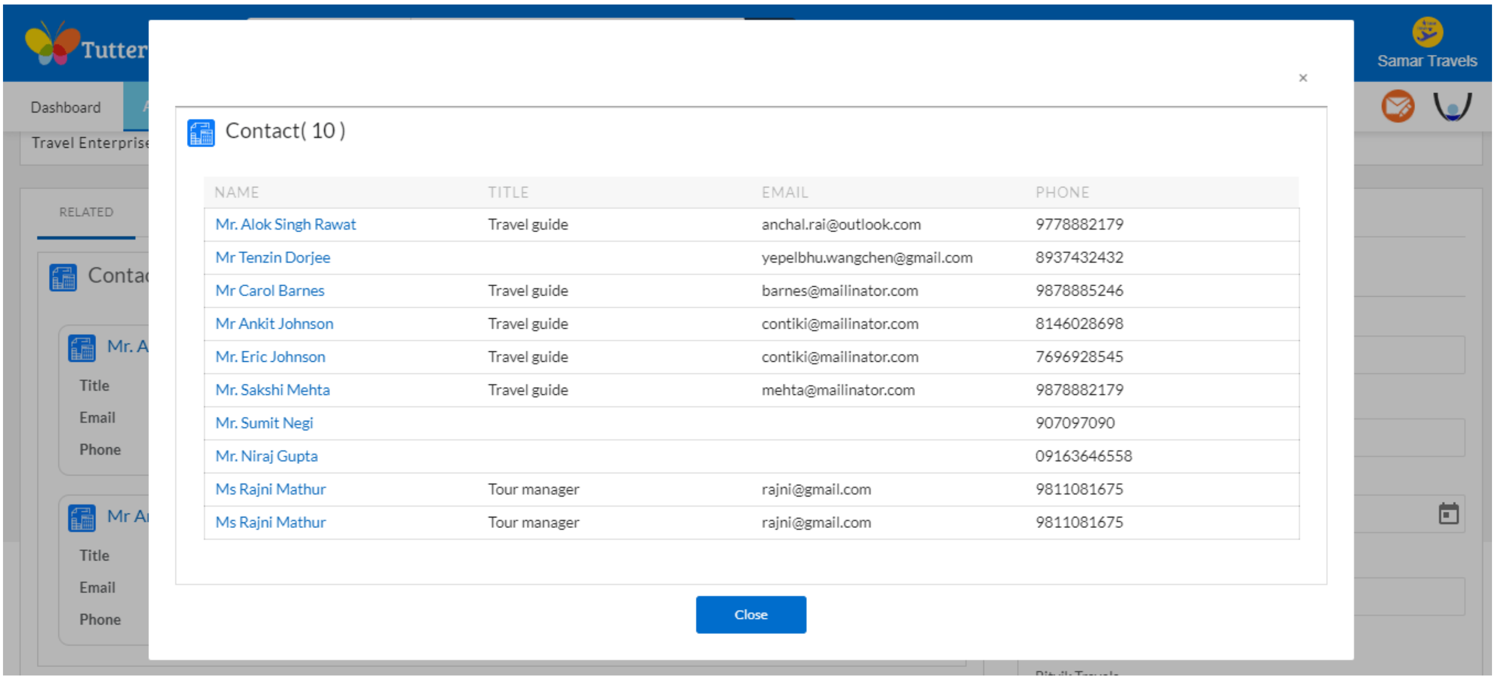
Check out all your Account Contacts with a few clicks. Follow here:

Step 1: Click on the **'View All'** link to access all the contacts under the current Account.

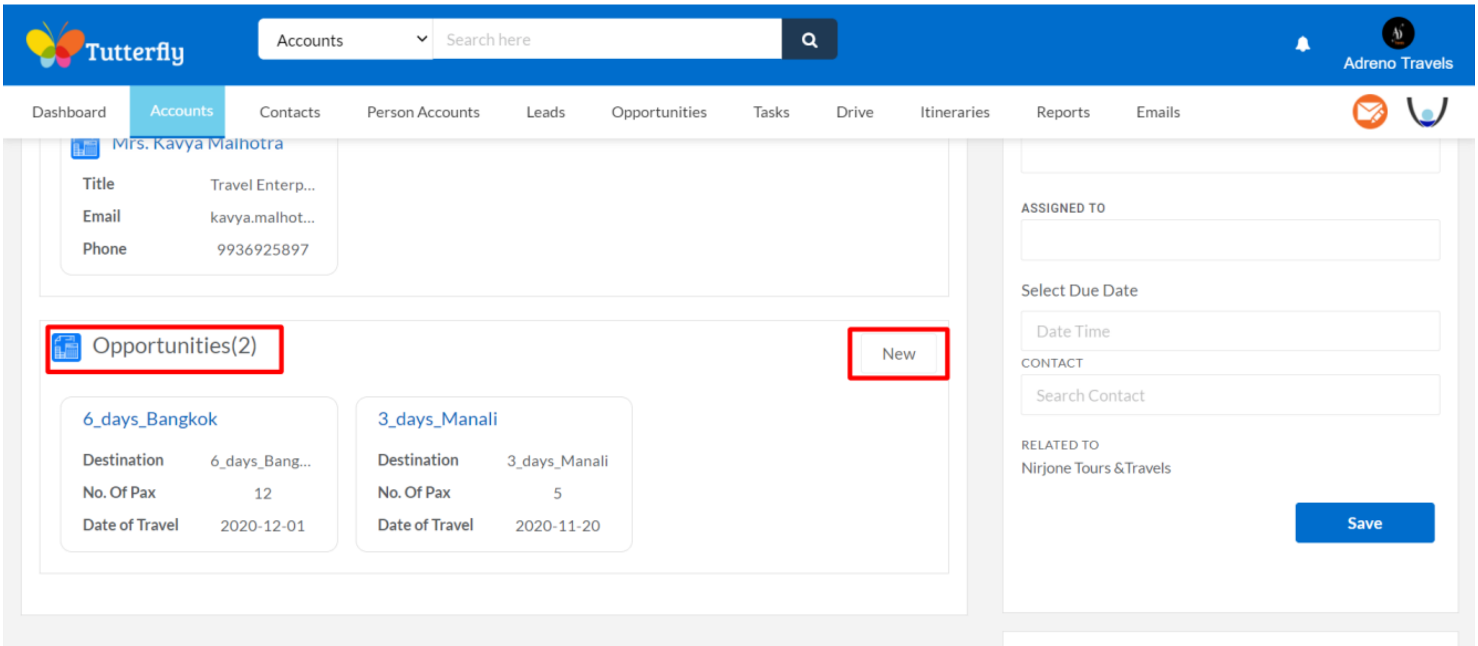


Note: The **'View All'** option details will only appear if there are more than six entries.

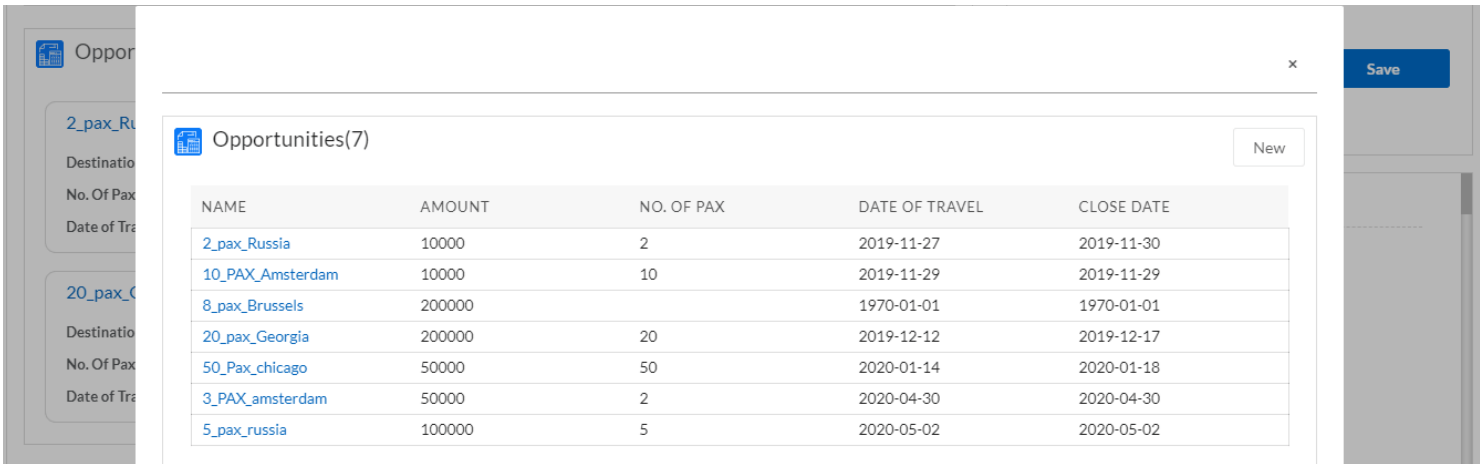
Step 2: When there are more than six 'Contacts' and you click 'View All', you will see a list of contacts. This will show the name, title, email, and phone number. Done!



Step 3: View all opportunities:

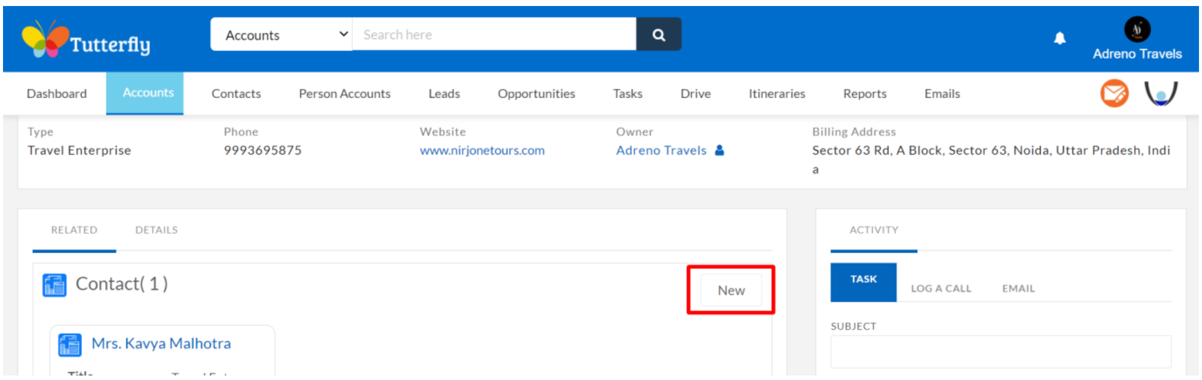


Note: A screen with all your opportunities will pop up.

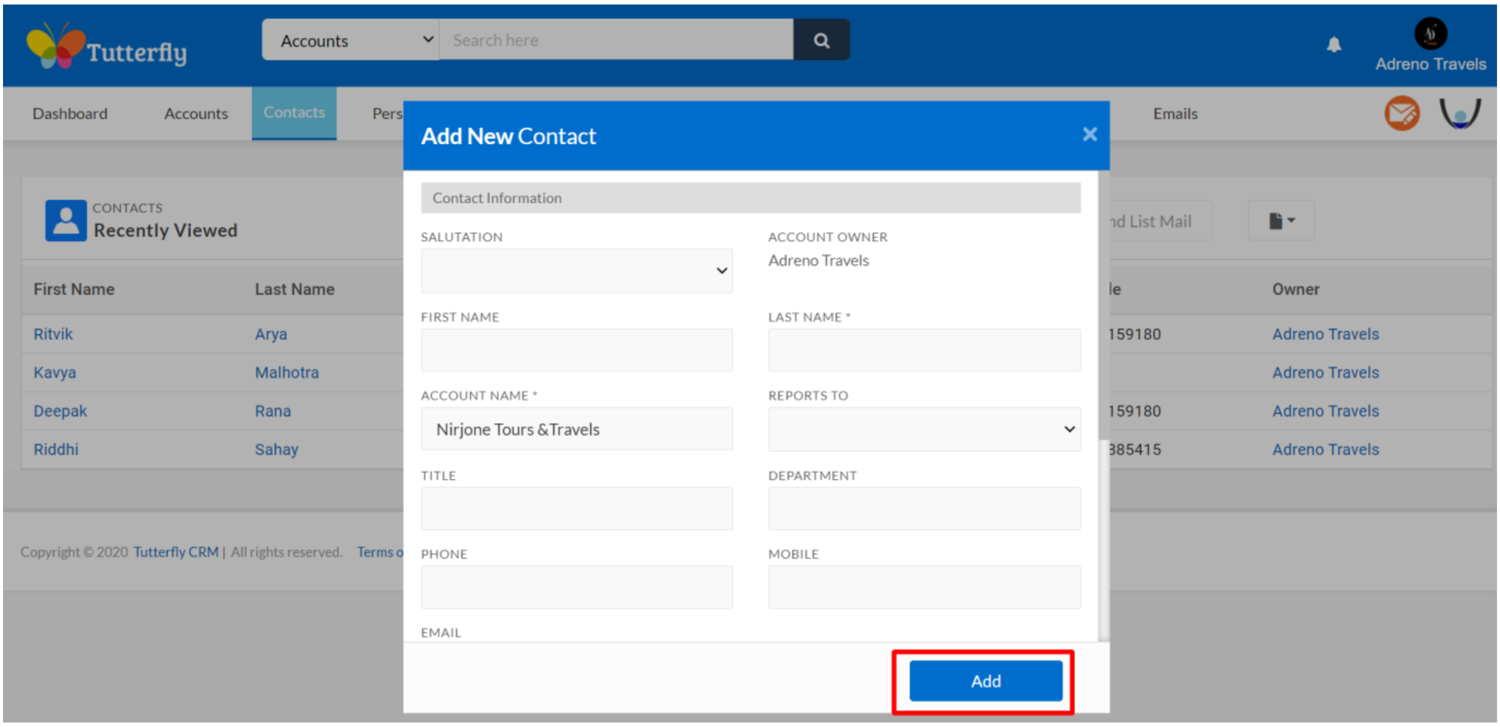


• Create a New Contact

Got a new client! Get that business it's own unique place with the steps below:



Note: After clicking on new a new screen will open up to add the contact name of the individual:



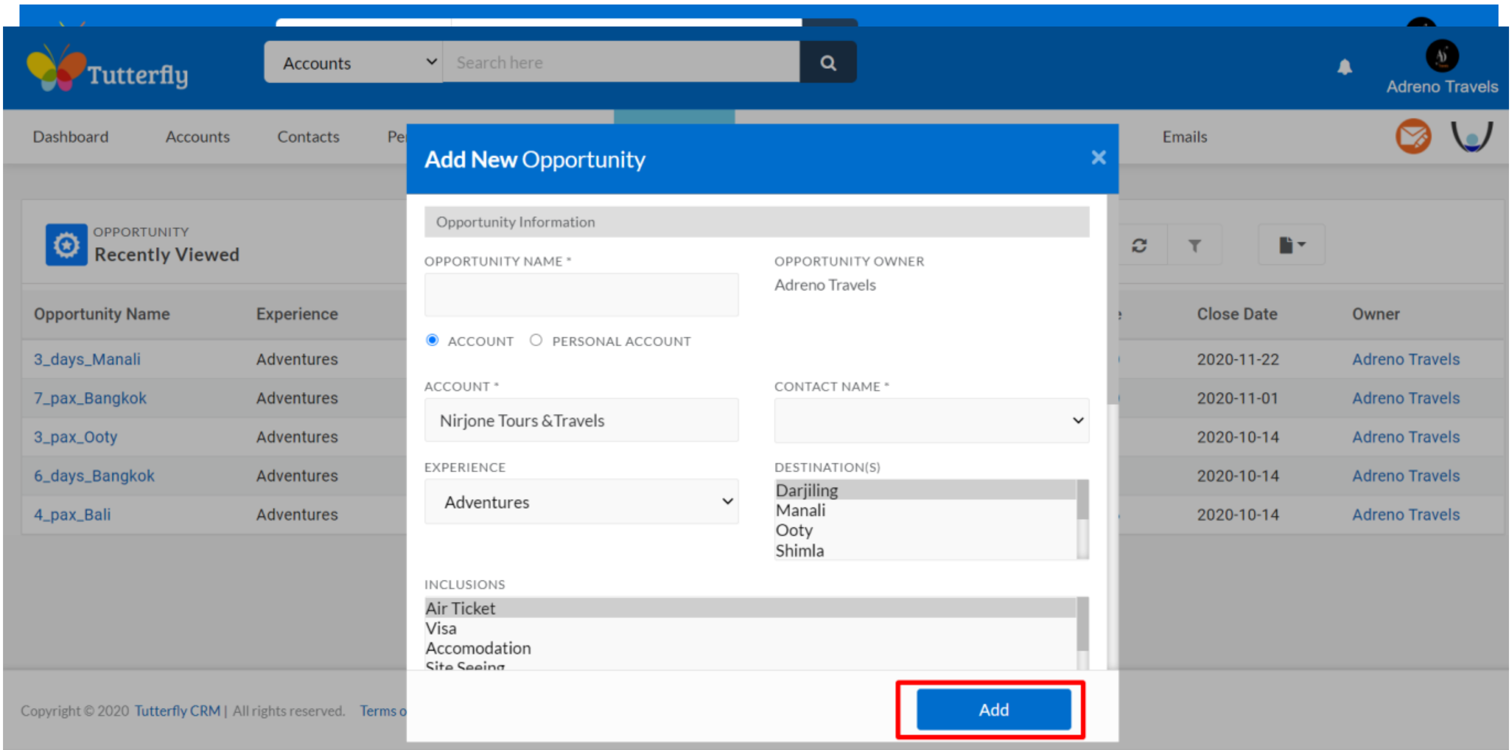
Two-step success! This will take them to **'Add New Contact'** under the **'Contacts'** section. The name of the Account gets automatically added to this form. Fill in all the details and click on the **'Add'** button.

• Create a New Opportunity

Got a new prospective business lead? Create a new Opportunity with the following steps:

Step 1: Create a new **"Opportunity"** under the current **'Account',** by clicking on the **'New'** button. Find this button in the **'Related'** section after 'Contacts'. This will take you to the **"Add New Opportunity"** box. The Account name will get automatically added to this form. Fill in all the details and click on the 'Add' button.

Add New opportunity' under the **'opportunity'** section. The name of the Account and gets automatically added to this form, you



need to select the contact person if there are more than 1 contact person. Fill in all the details and click on the **'Add'** button.

• 'Details' Section

'Details' mentions additional info linked with Account. You can find specifics like address, system and Account details here. You will also see a summary of all the opportunities linked with this Account.

Account name, Account owner, type, recent Account, website, franchise, phone number, industry and others.

Account Summary- Get an interactive figure of your Account here. Choose from a number of graphical representation of that Account. TutterflyCRM assigns a unique colour to different stage of the sales pipeline.

Address Information - This section shows the map of the address mentioned in the Account.

System Information- This is the last one! This displays the details of the user who "Created" and "Last Modified" the Account. It also mentions the date and time of changes made.

• How to Work with the Activity Section in 'Accounts'?

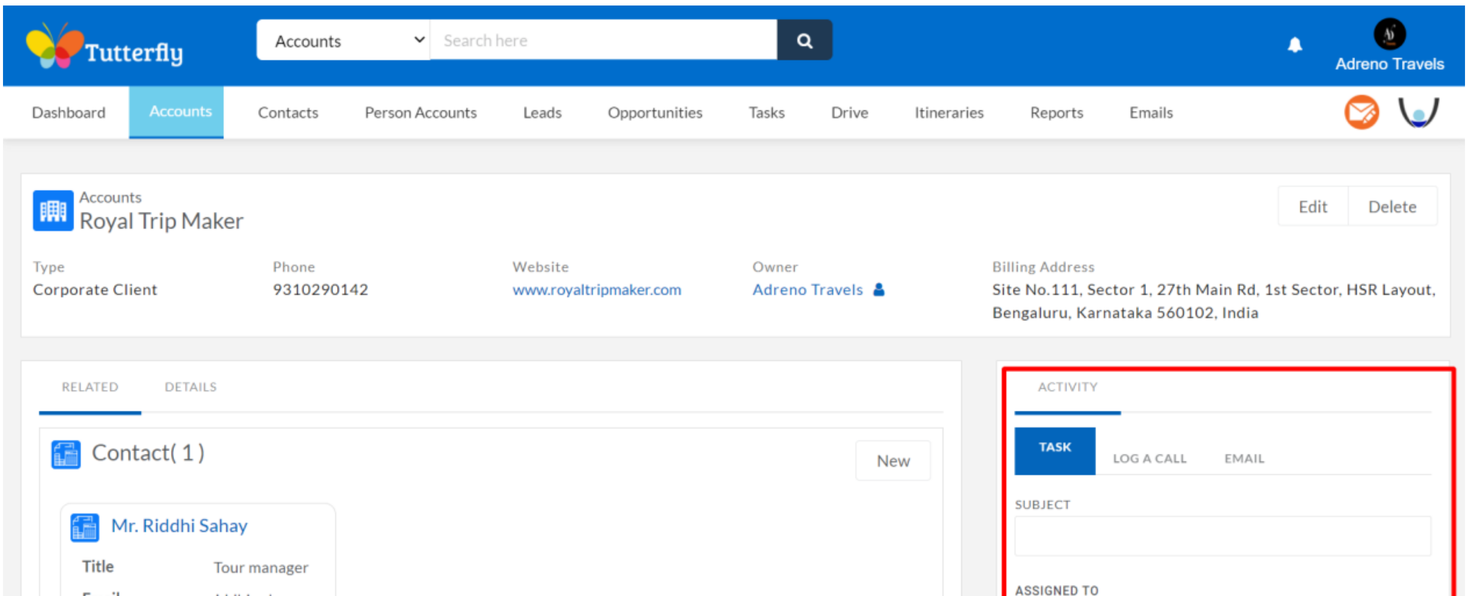
Ready to make the most of your TutterflyCRM Accounts? Here's a stepwise guide to use emails, tasks and call logging through the Activity section.

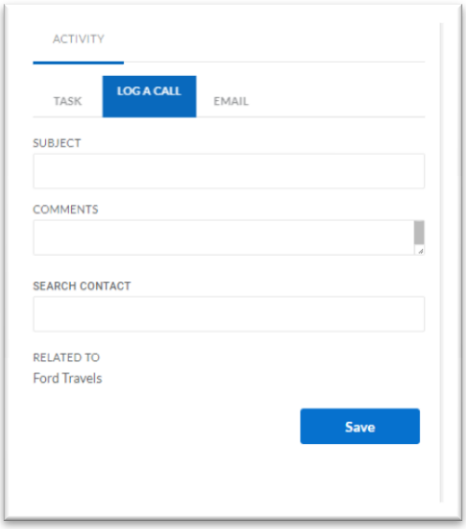
Task

You have your daily to-do list here! If you are Admin, then you can assign tasks to other users too. You will get due date, time limit and everything else for the task right here.

Call Logging

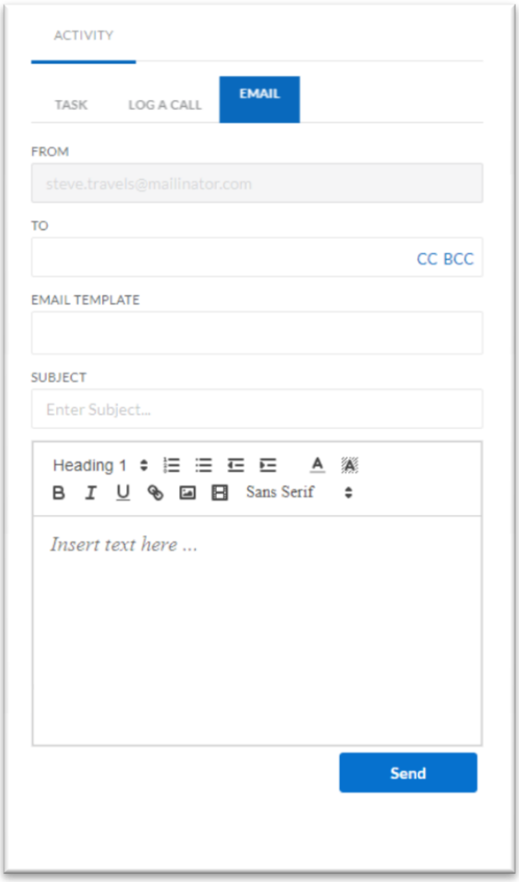
Take smart notes from your client calls with TutterflyCRM. Review it later for better sales pitches!





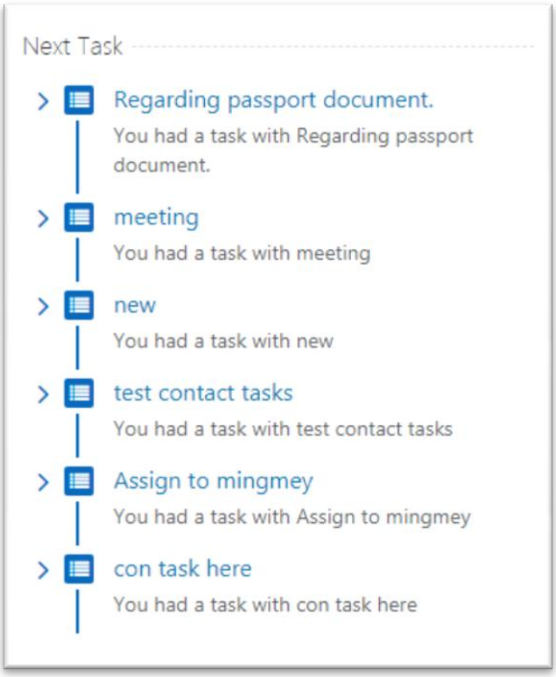
Email

Send out emails quickly through the Email section. Choose from preset email templates and save your custom ones as well.



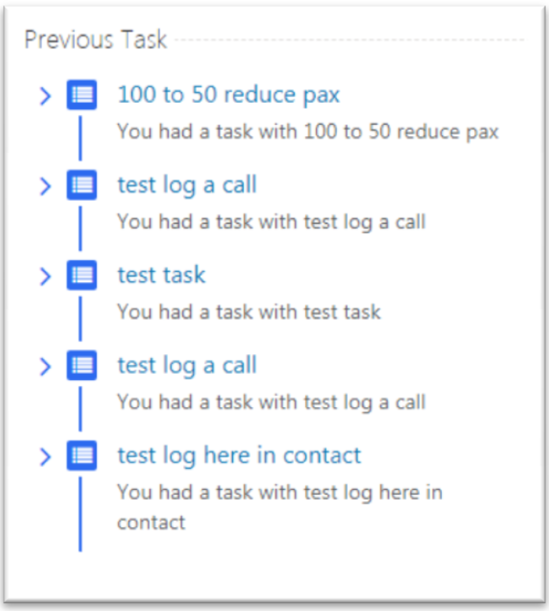
Next Task

Run through your daily to-do list fast through this Account. See the top six tasks pending everyday here!



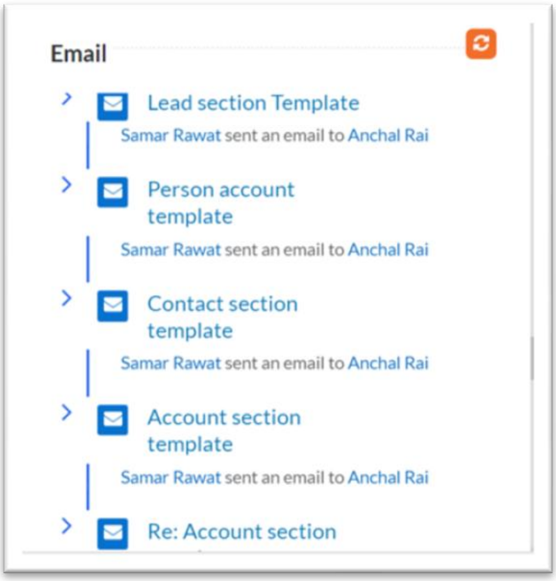
Previous Task

Check back on a completed task with one click!



Email

This is the final one! Access all email communication logs with a click!



• How to Create a Contact?

Have you met a new contact? Awesome! Just follow the steps below to learn all about contacts and how to manage them easily.

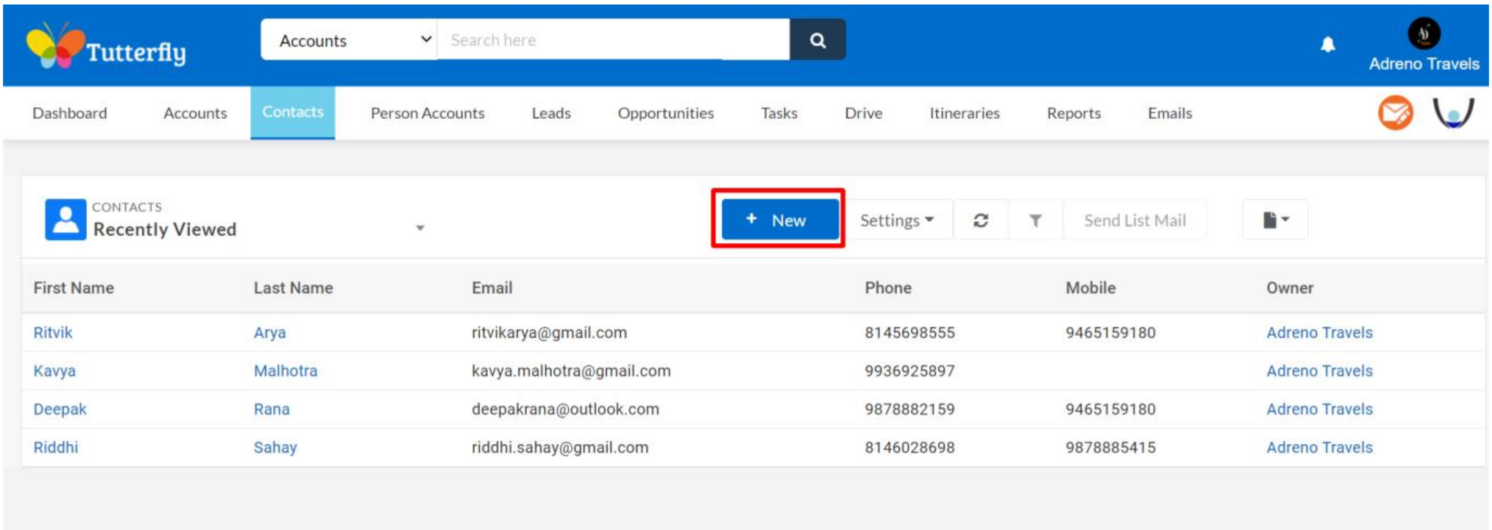
What are Contacts?

Contacts are individuals directly dealing with the end-customer. A Contact represents people associated with the Account with whom your business deals with. Each Contact has its own parent Account, email address, phone number, etc.

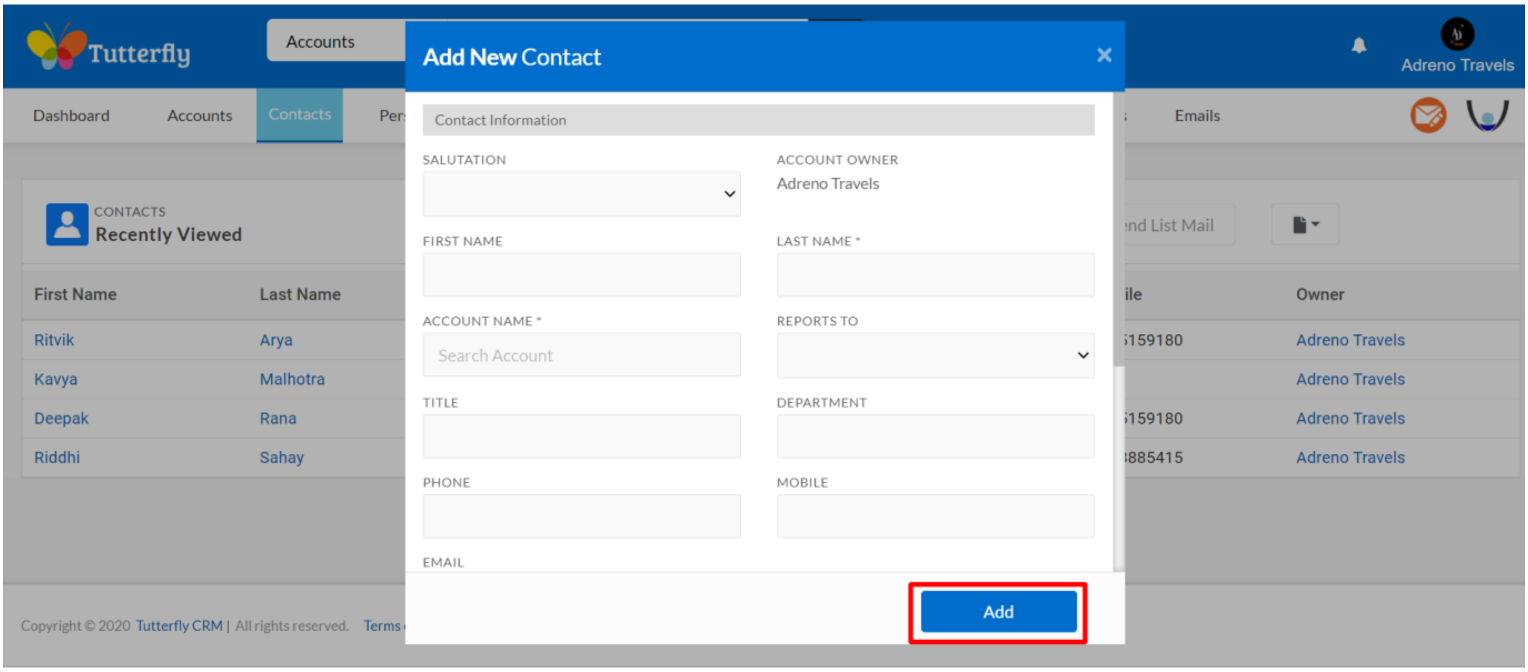
Details associated with a Contact may differ from the 'Accounts' record. Hence, the details are stored separately.

• Create a New Contact

Step 1: Go to 'Contacts' page and click on '+New' button on the top-right corner.

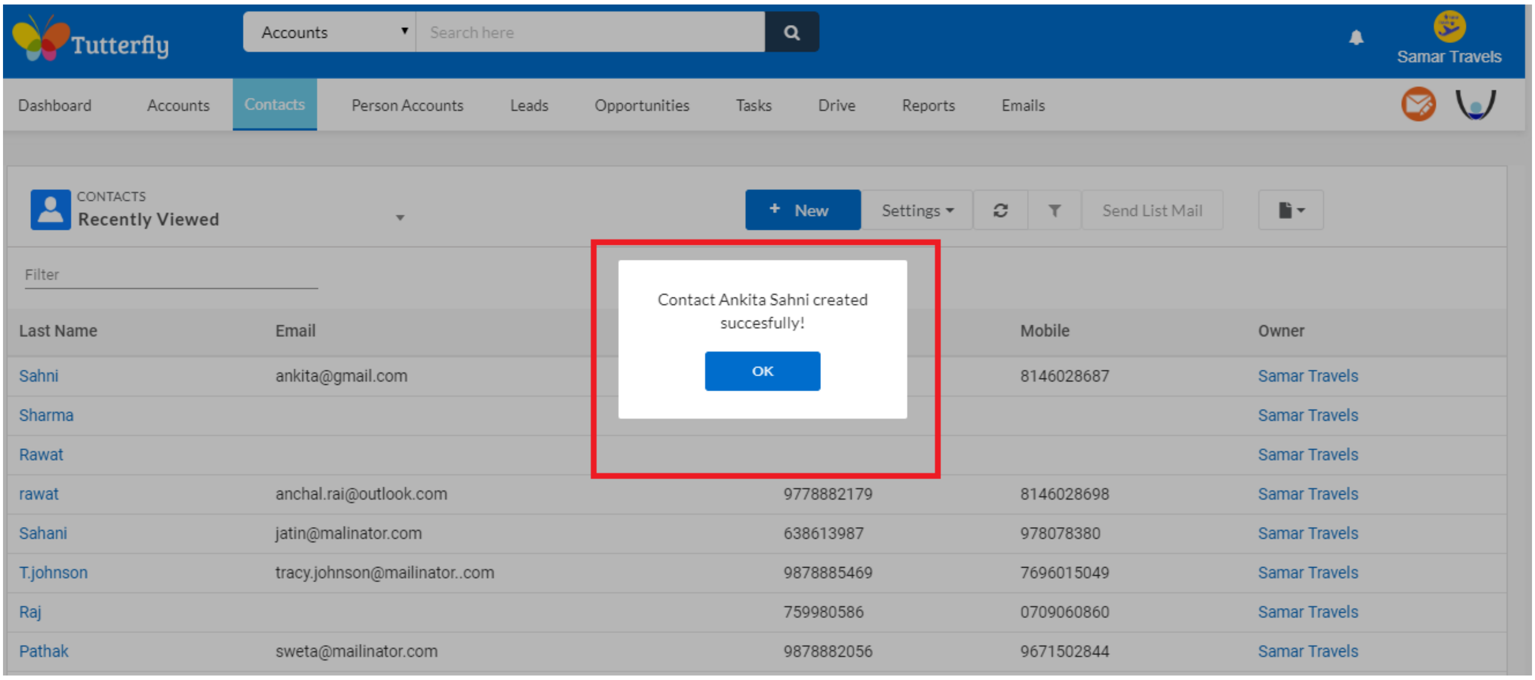


Step 2: From the **"Add New Contact"** window, add the information in each box. The fields for **'Last Name'** and **'Account Name'** are mandatory.



Step 3: We are almost near the finishing line! After entering all fields, click on the **'Add'** button.

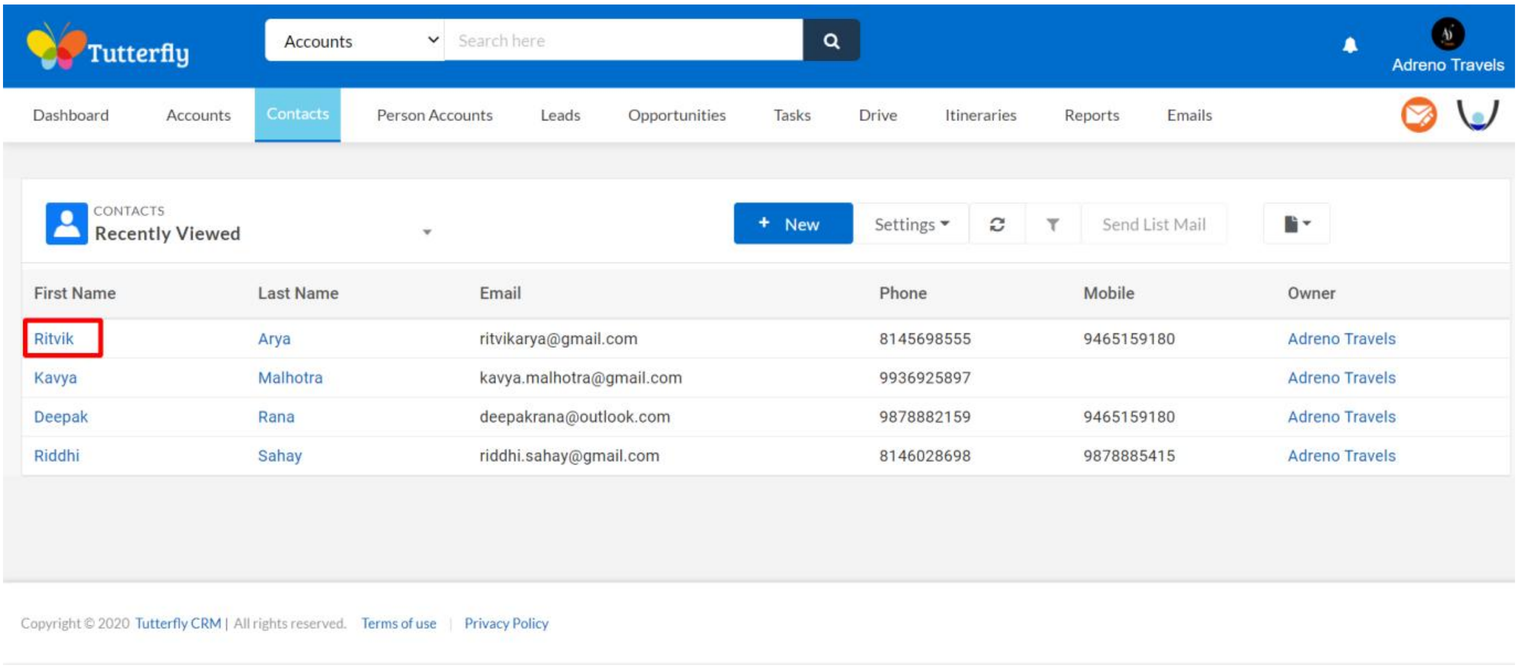
Step 4: Finally! we are at the last step. Here a dialog box will appear there indicating the successful creation of Contact.



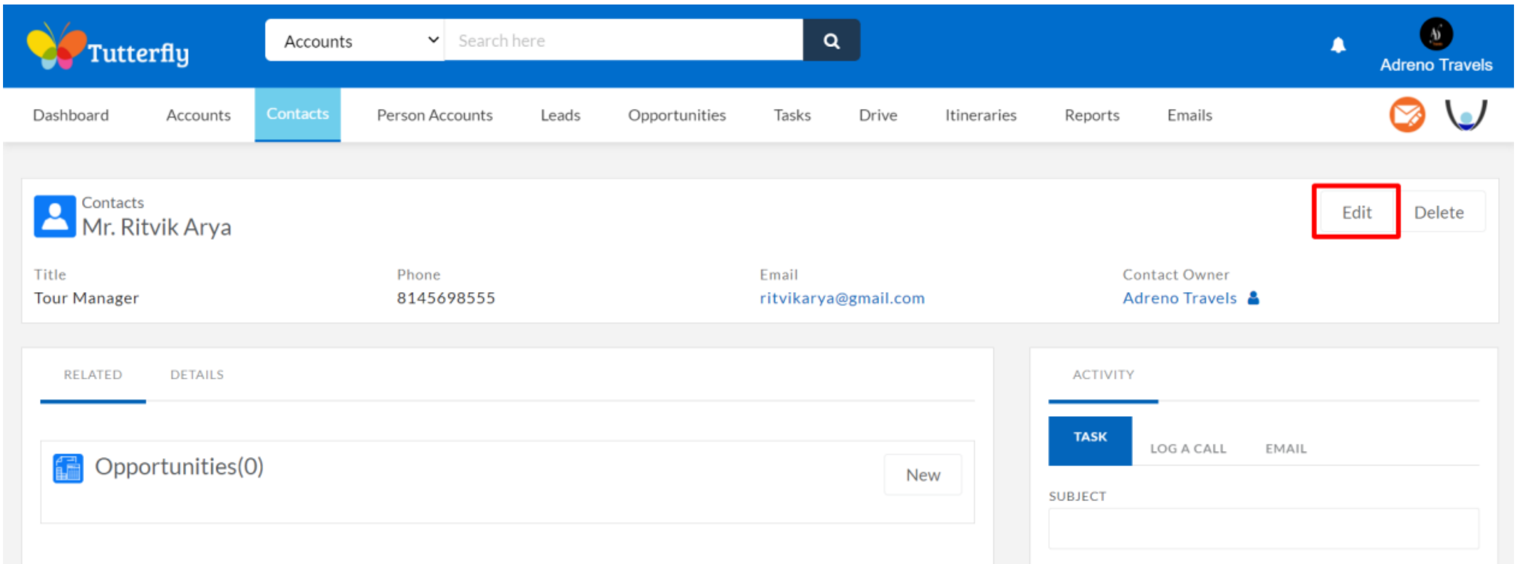
• How to Edit an Existing Contact?

Your business contact got a new number? Make changes in your contacts in TutterflyCRM easily by following the steps below.

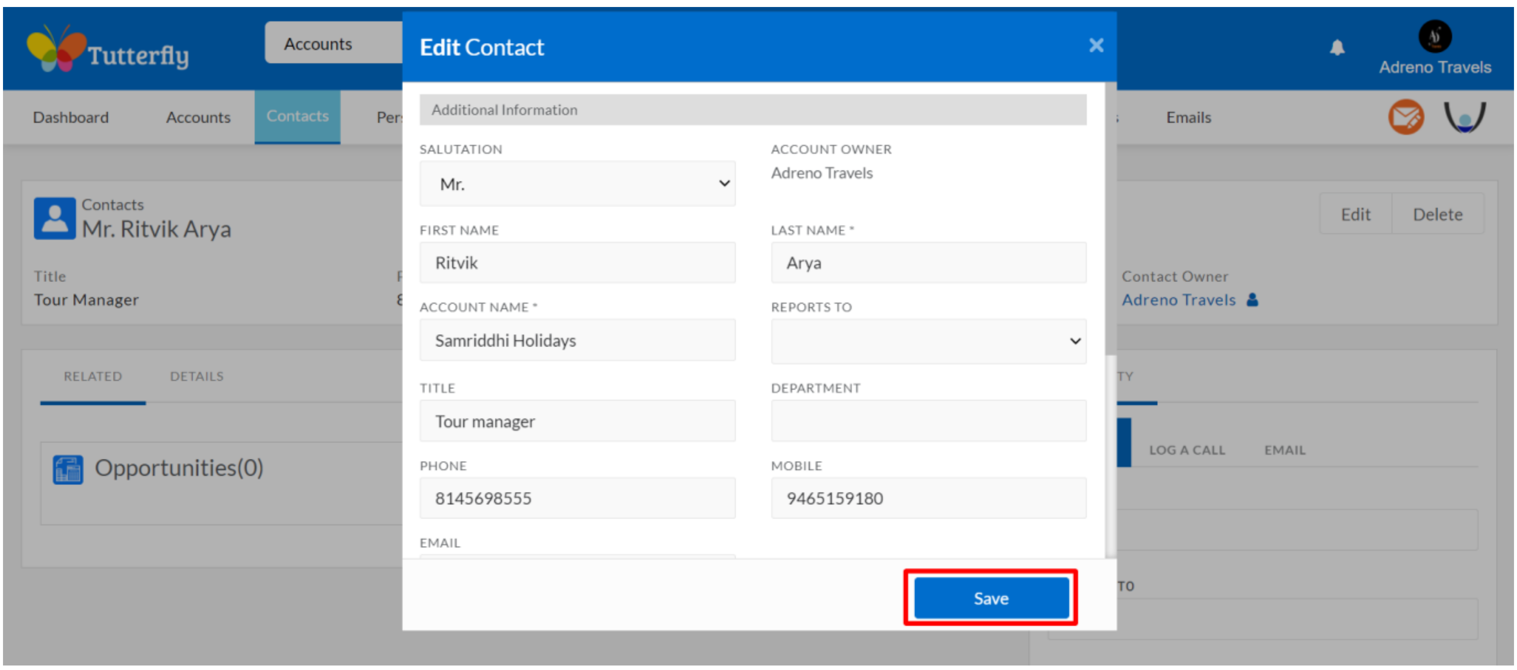
Step 1: To edit a contact, select the last name of the Contact in which you want to make changes. It contains a link that will redirect you to another section.



Step 2: Click on the **Edit** button from the top-right corner.



Step 3: From the **"Edit Contact"** window, change the necessary fields.



Step 4: Hurray! We are a few steps away from saving the edits. Click on the **'Save'** button.

Step 5: At last! We have completed making changes to a record. A message box will appear notifying that the Contact has been updated.

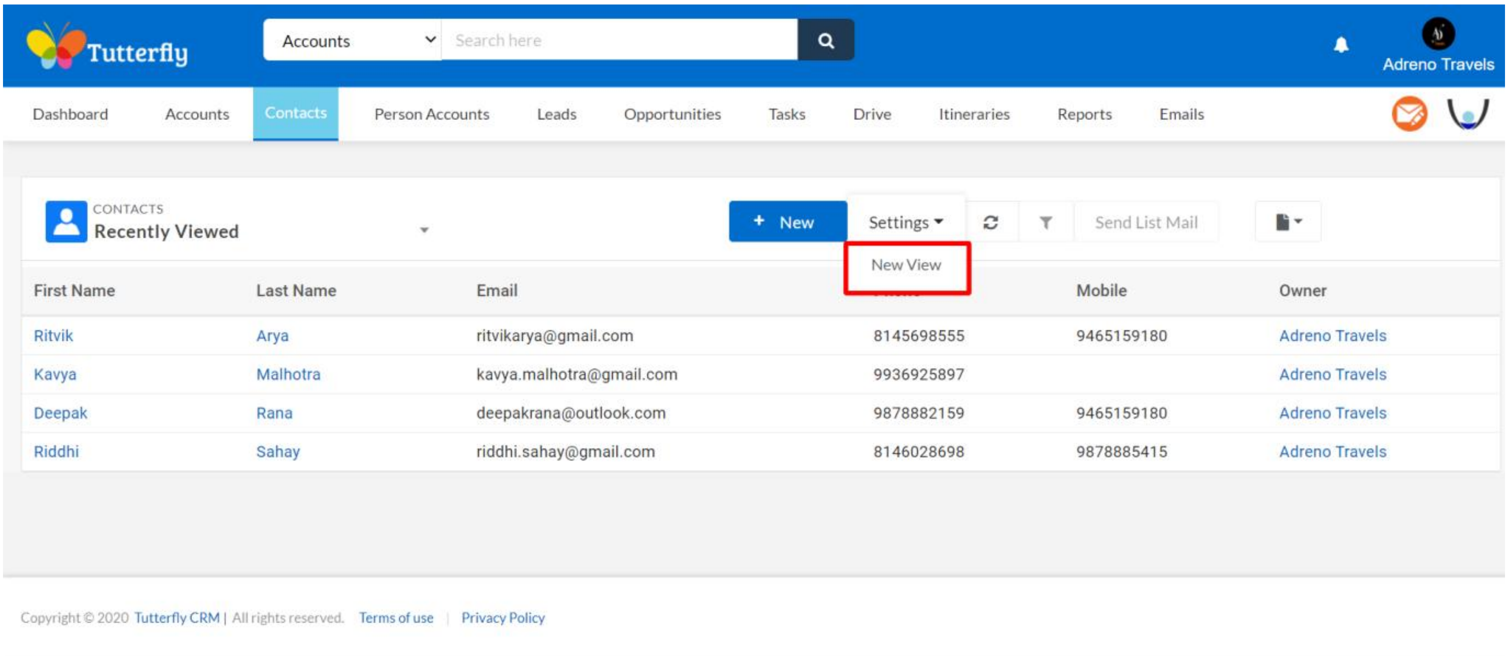
• How to Manage Views in Contacts?

Create a New View in Contact

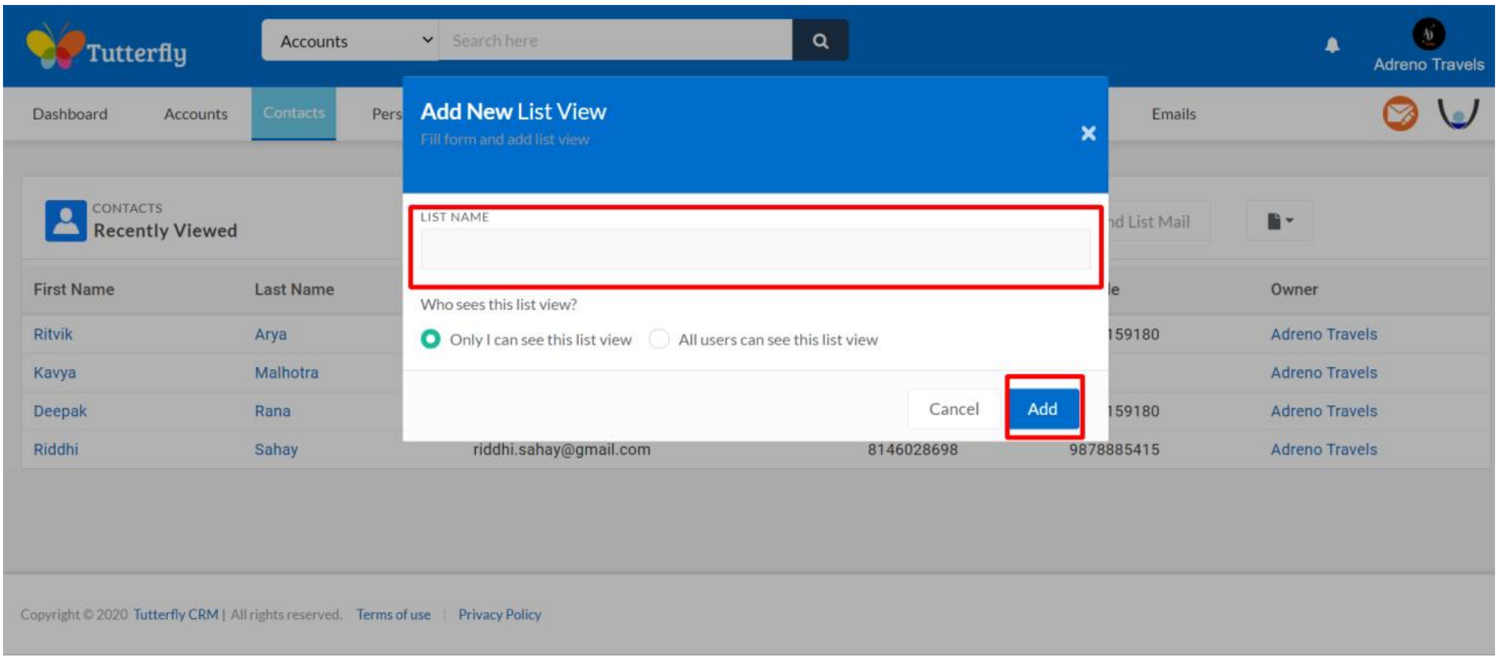
Managing so many contacts can be difficult. TutterflyCRM makes it easy for you by creating views.

Note: To know more about Views, go to dedicated section for this from the link below.

Step 1: Click on the Settings – **Click on New**.



Step 2: Name your view.

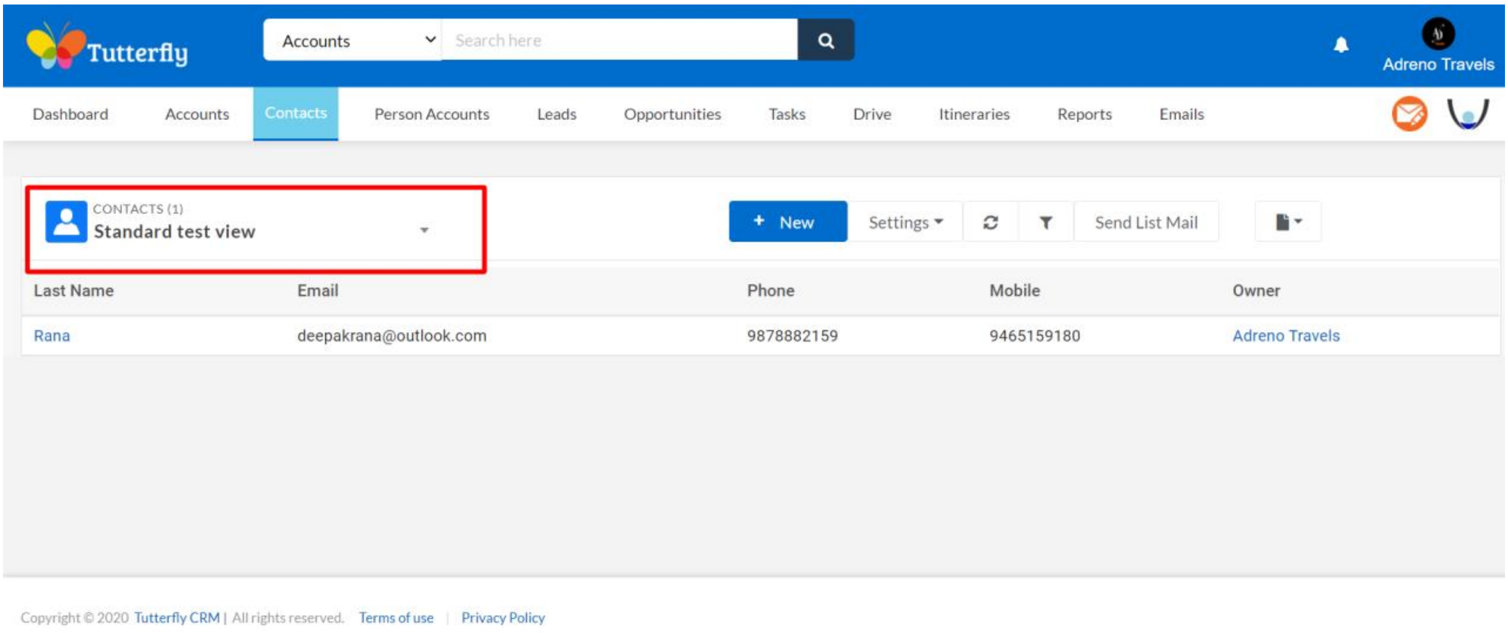


Step 3: Type in the **'List Name'** and choose display settings.

● Only I can see this list-view: The view is only visible to the user creating the view.

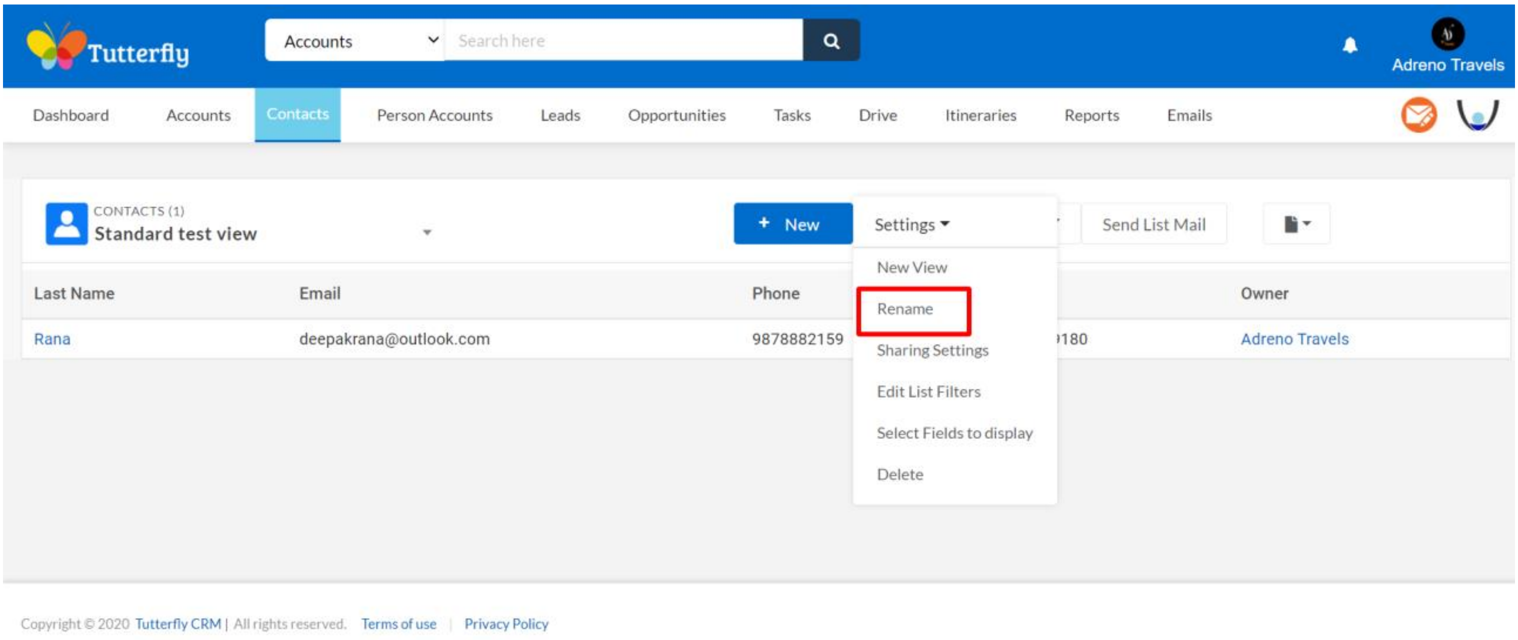
● All users can see this list-view: All users can access the new view.

Step 4: Click on the **'Add button'**. The new view gets added to the list of views displayed in the top-left corner, just like the image below:



● How to Rename the View

Step 1: Click on the rename option.



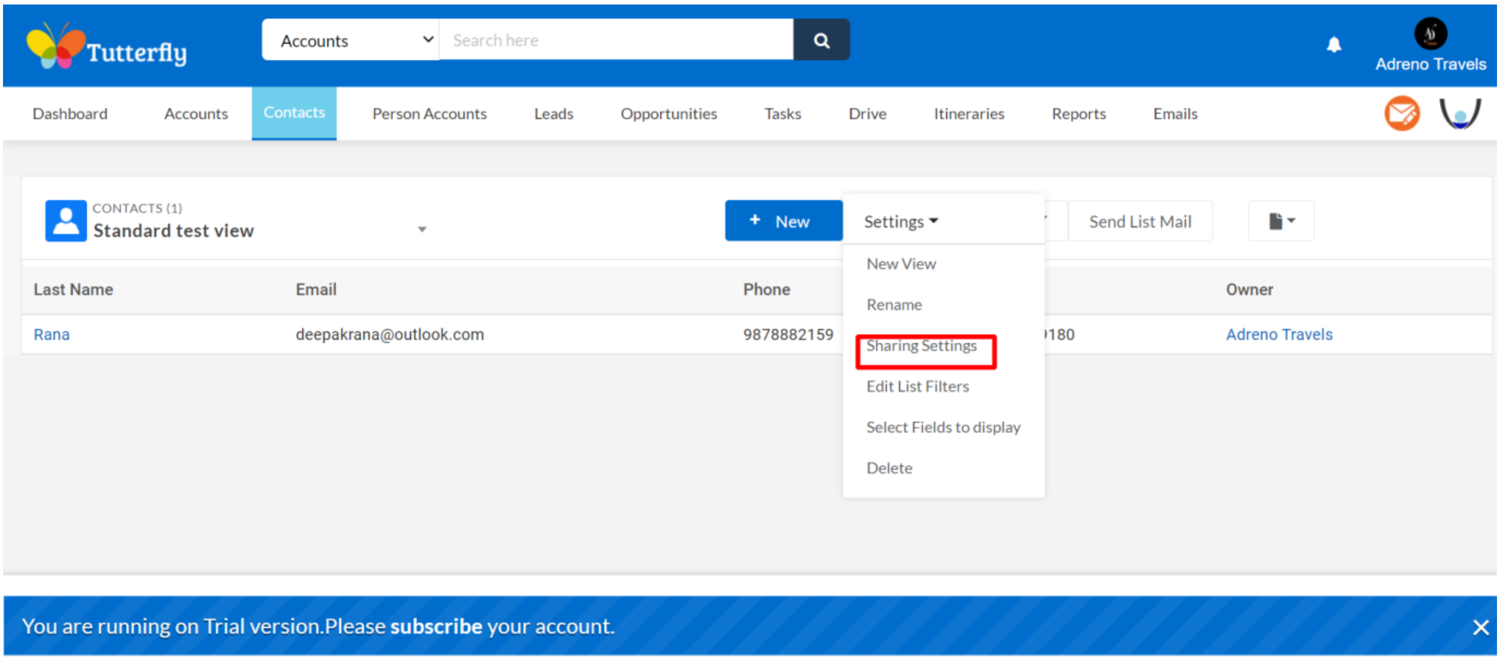
Step 2: Enter the view name to which you want to replace the created view.

Step 3: Click on save.

• Change the Sharing Setting

In TutterflyCRM, a user can control access to some parts of the data by using share settings. Listed below are steps to limit other users from accessing important data.

Step 1: Go to **Settings >>** Sharing Settings. A box will appear like the one shown in this image below:

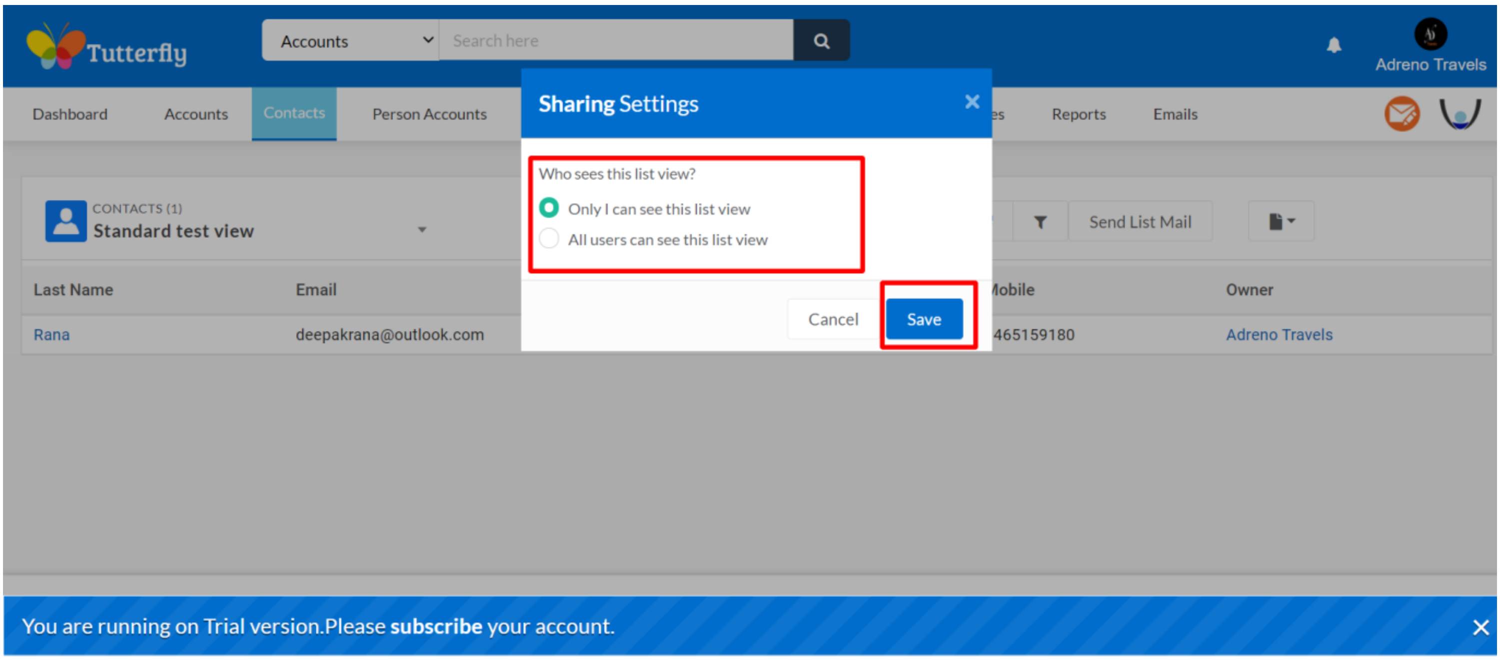


Step 2: From the **'Sharing Settings'** box, select the options to set the privacy level.

● Only I can see this List-View: Only the owner account skytravels will be able to see the view.

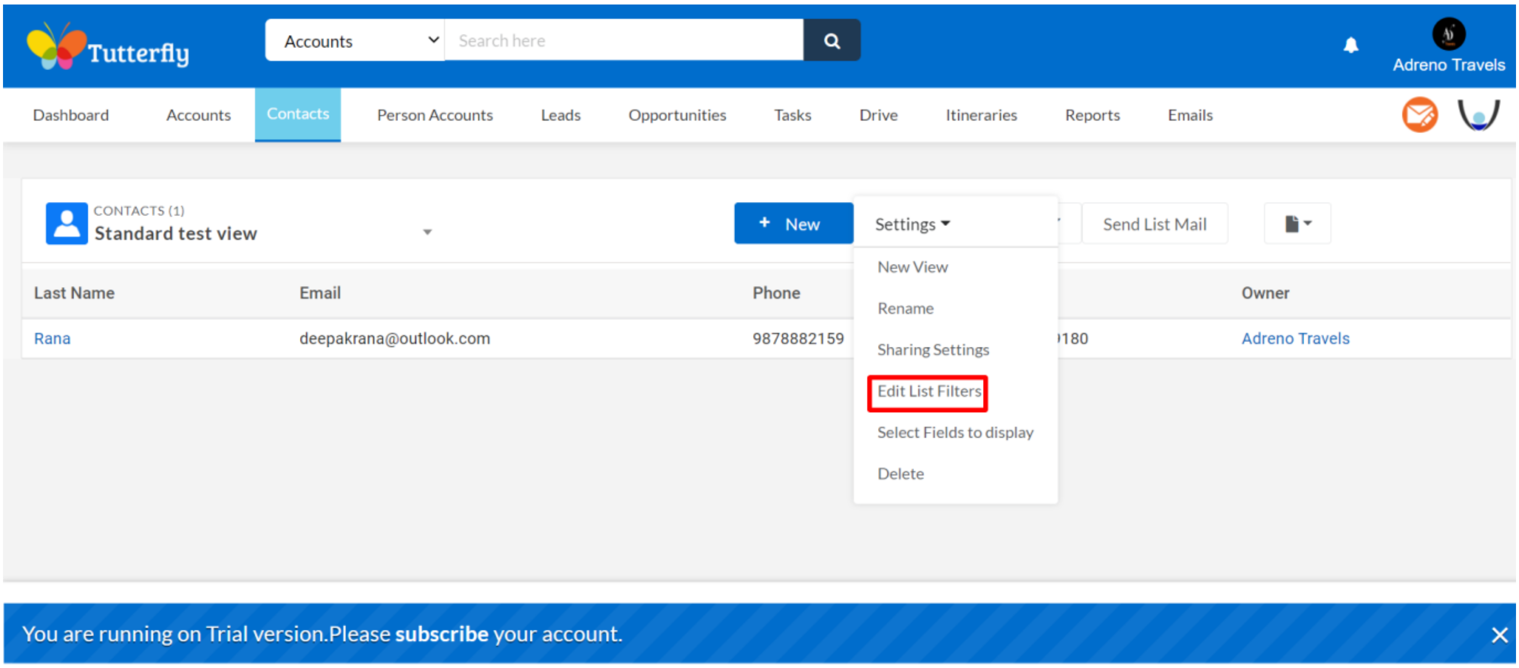
● All users can see this list-view: All the users will be able to see the view.

Step 3: Next, click on the **'Save'** button.

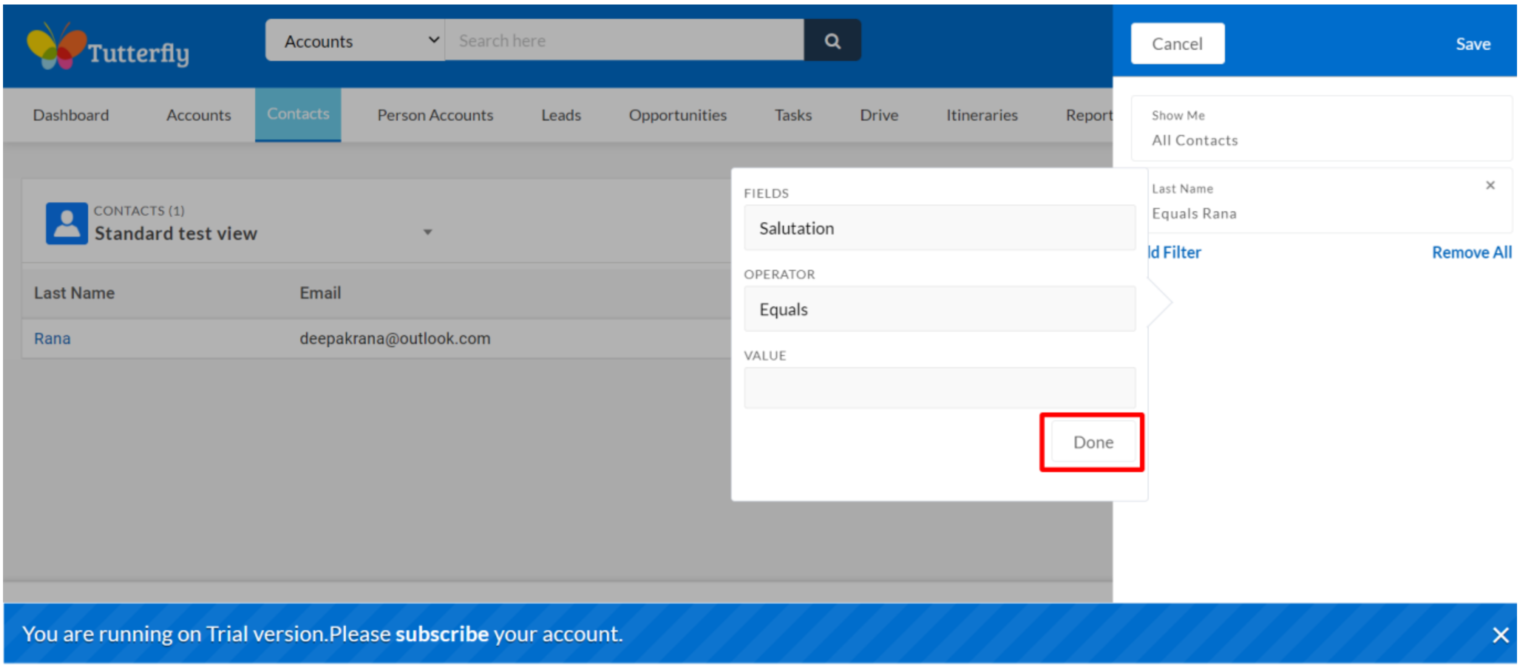


• Edit List Filters

Step 1: Go to **'Settings'** and click on **'Edit List Filters'**. A pop-up will appear in the right-hand corner just like the one shown in the window below.



Step 2: This pop-up can also appear by clicking the filter icon.



Step 3: A user can change visibility settings, click on **'Show Me'** box. A user has to choose **'All Accounts'** click on **'Done'** button.

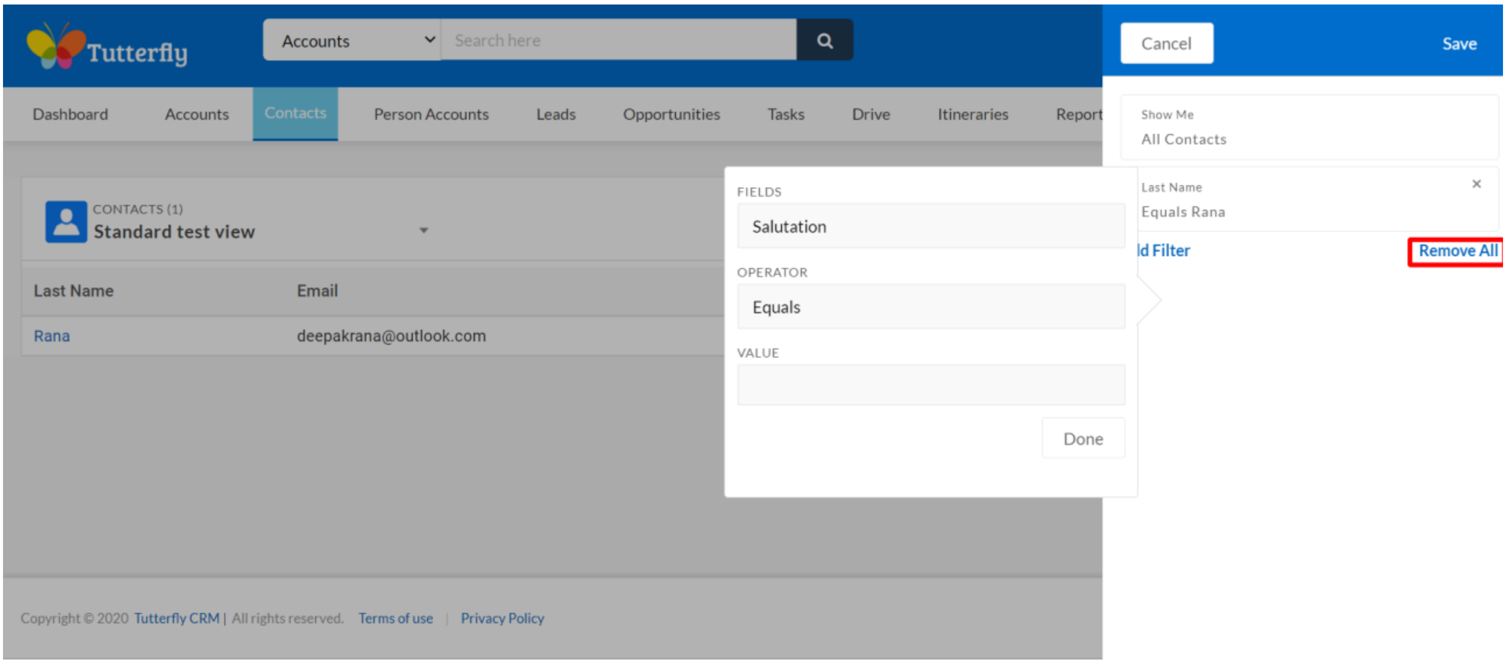
All Accounts: A user can apply a filter to view all the Contacts created by the admin and other agents.

Step 4: Click on **'Add Filter'** and fill in details such as a field, operator, and value. Next, click on the **'Done'** button.

Step 5: Click the **'Save'** button to save the changes made.

• Remove an Existing Filter

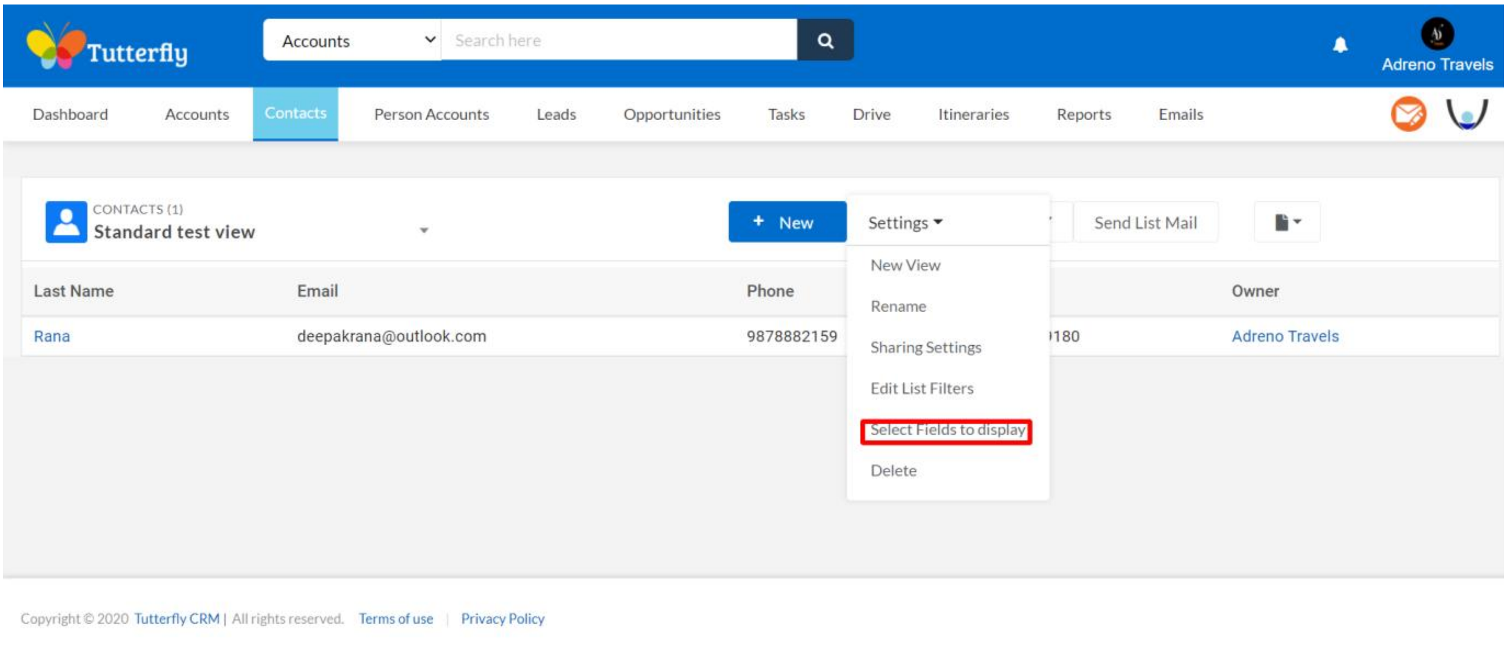
Step 1: There is another option to clear an existing filter by clicking on the **'Remove All'** link in the far right corner.



Step 2: Click on the **'Save'** to save the changes made.

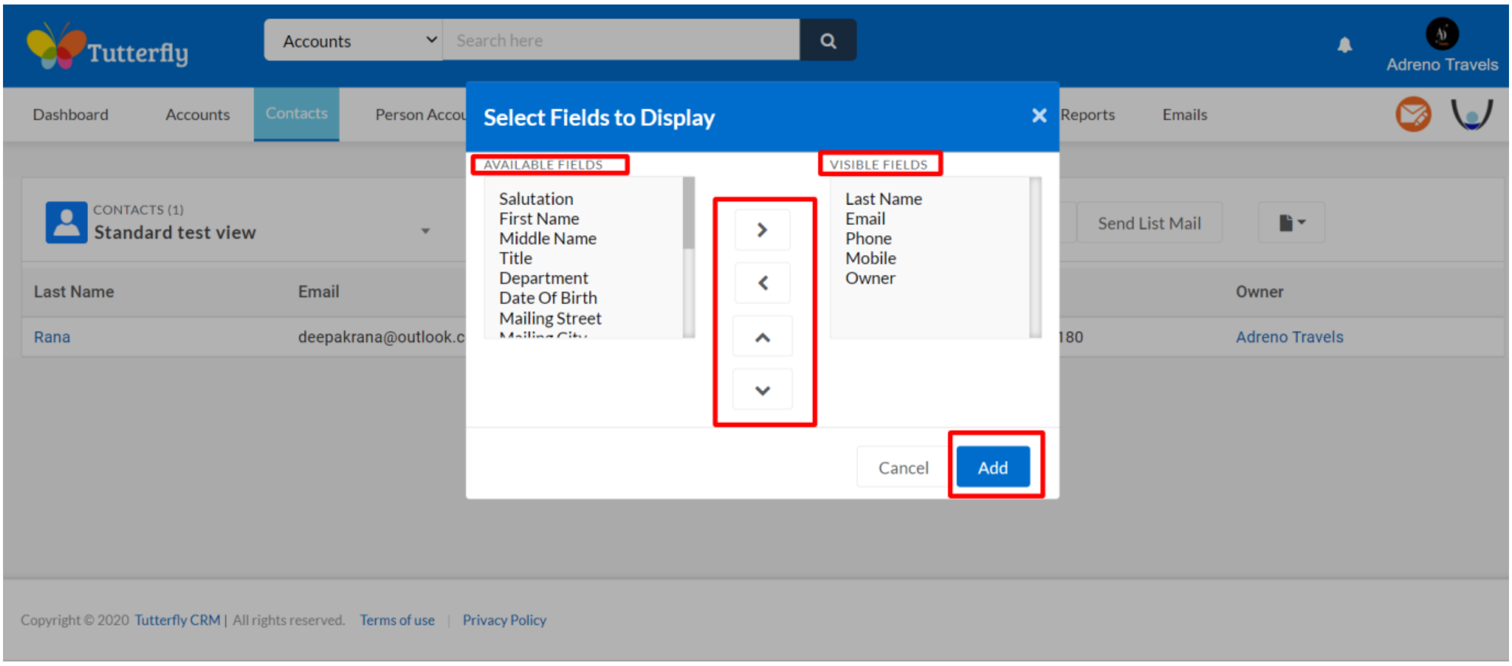
Select Fields to Display

Step 1: Click on **Settings >>** Select Fields to Display.



Step 2: Click on **Settings >>** Select Fields to Display.

Step 3: Congratulations! We are reaching the end. From the **'Select Fields to Display'** box, a user can add or remove fields in a View. There are two sections:



'Available Fields' and **'visible fields'.** To add an item, select column names and click on '>' symbol. To remove an item from visible fields, click on the '<' icon. Click on '^' OR 'V' symbol to change the position in the view.

Great! We have learned all about managing Views in **'Contacts'**. Now, click on **'Add'** button to proceed with the action of adding new or **'Cancel'** to remove any changes made.

Note: These changes are not applicable on the Default View.

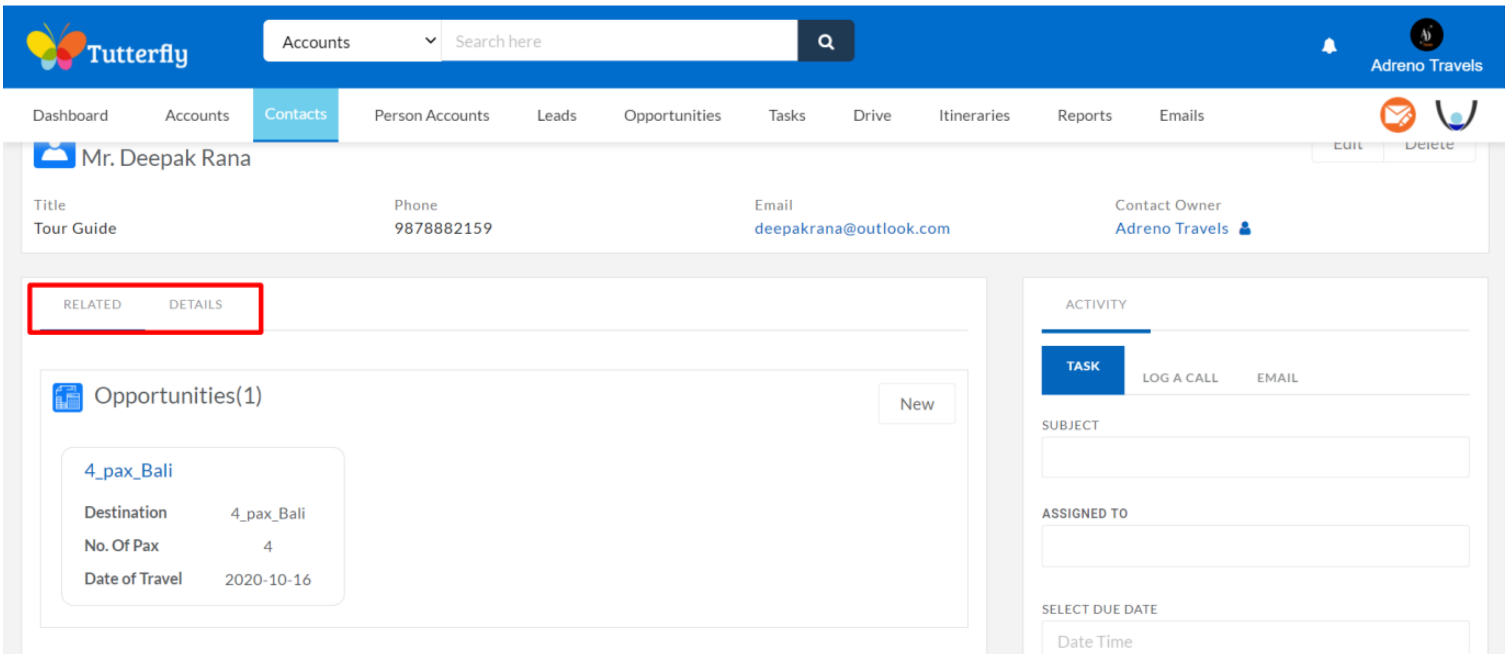
• How to Use the Contact Section?

Need to access additional details related to a Contact? Keep on reading...

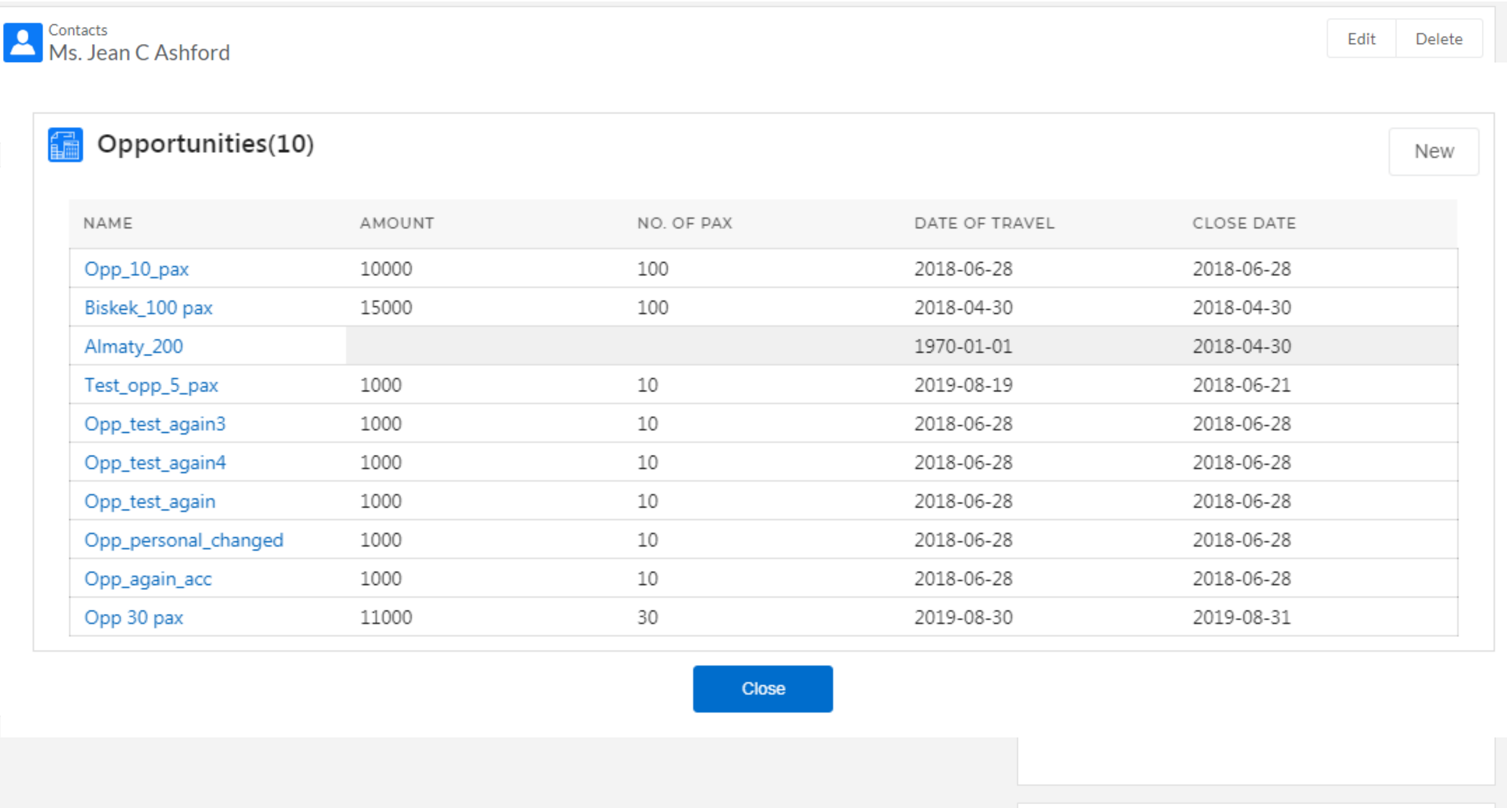
'Related' Section

There are multiple opportunities related with each contact. A user can access information on each opportunity through this section.

View All Contacts



Step 1: If there are more than six opportunities associated with a single Contact, a view more link is created. Click on the **'View All'** link to access all the opportunities within a particular contact.

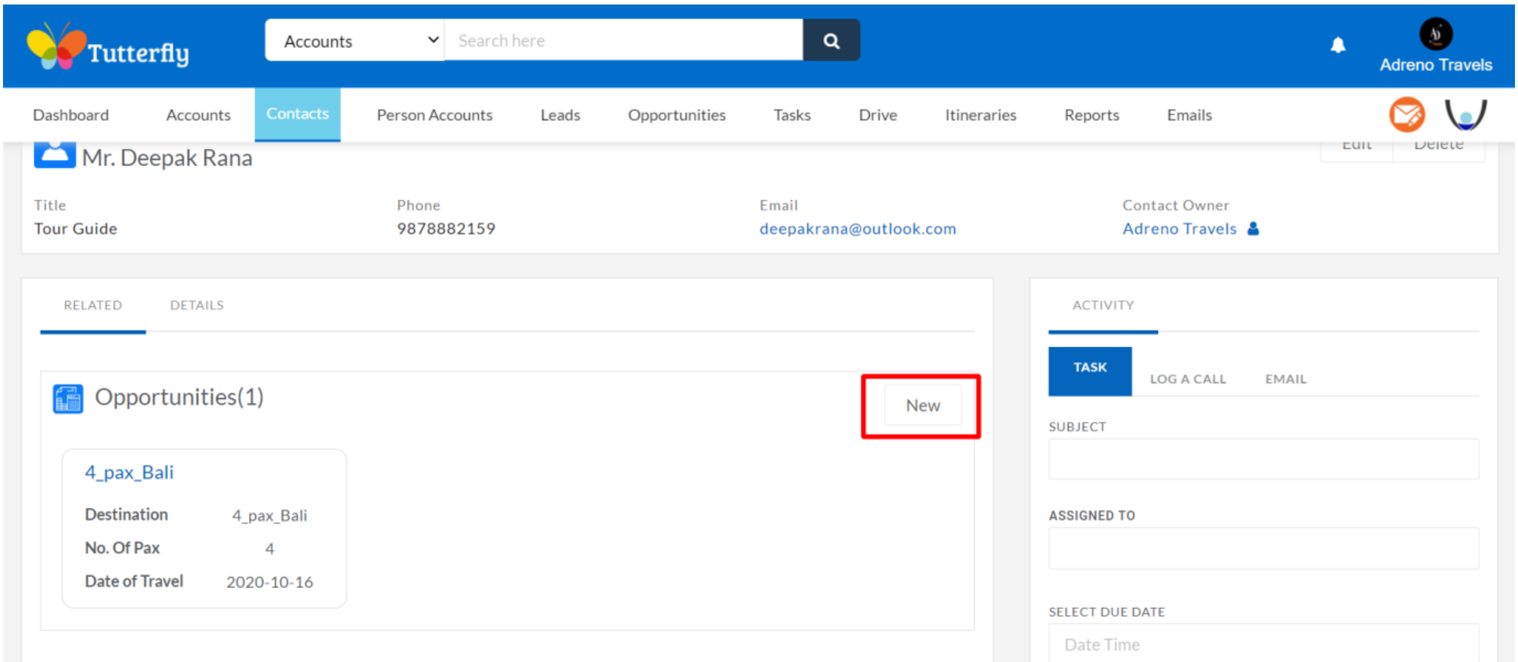


NAME	AMOUNT	NO. OF PAX	DATE OF TRAVEL	CLOSE DATE
Opp_10_pax	10000	100	2018-06-28	2018-06-28
Biskek_100 pax	15000	100	2018-04-30	2018-04-30
Almaty_200			1970-01-01	2018-04-30
Test_opp_5_pax	1000	10	2019-08-19	2018-06-21
Opp_test_again3	1000	10	2018-06-28	2018-06-28
Opp_test_again4	1000	10	2018-06-28	2018-06-28
Opp_test_again	1000	10	2018-06-28	2018-06-28
Opp_personal_changed	1000	10	2018-06-28	2018-06-28
Opp_again_acc	1000	10	2018-06-28	2018-06-28
Opp 30 pax	11000	30	2019-08-30	2019-08-31

Step 2: From the **'Opportunities'** window, a user can view a list of all opportunities for that particular contact.

• Create a New Opportunity

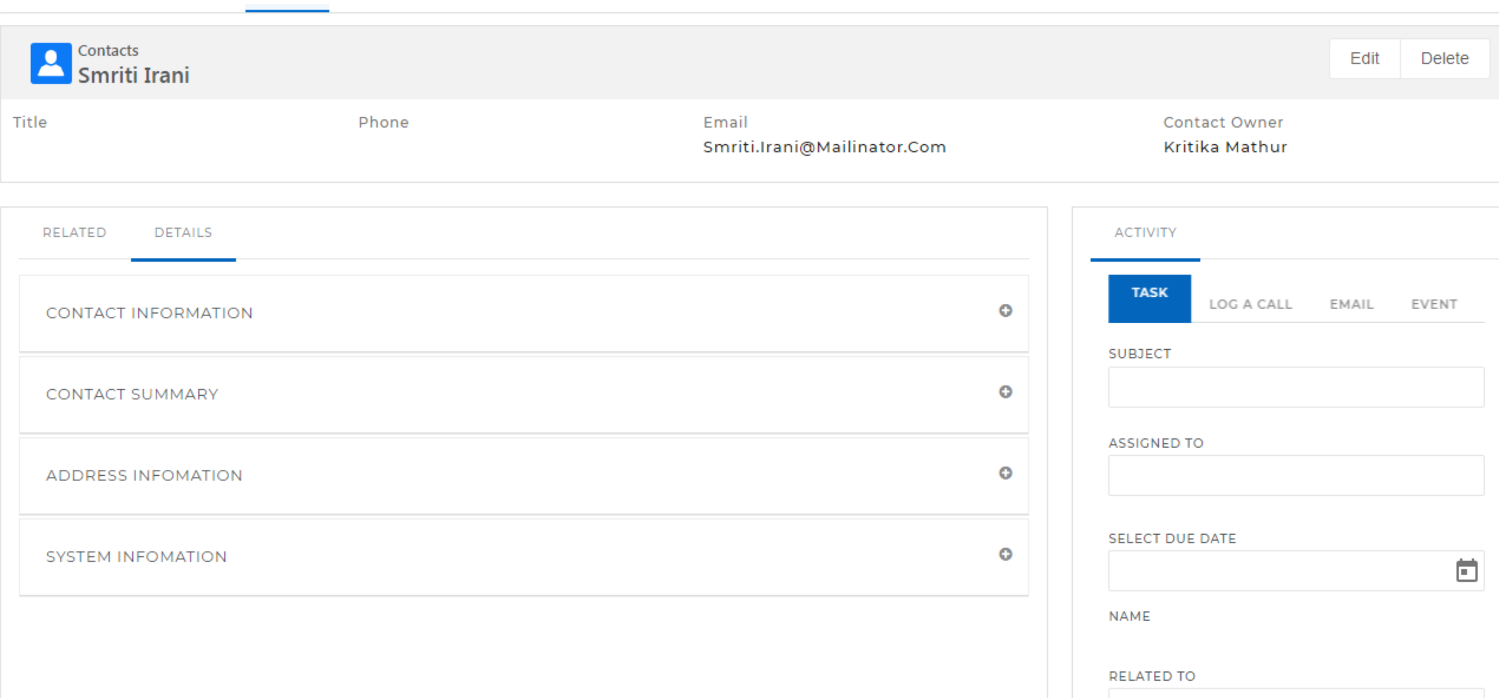
To create a new **"Opportunity"** for each 'contact', a user has to click on the **'New'** button in the 'Related' section. This will navigate the user to the **"Add New Opportunity"** form. The name of the contact gets automatically added to this form. Fill in all the details and click on the **'Add'** button.



Note: To know how to manage opportunity please refer our opportunity module in help pages.

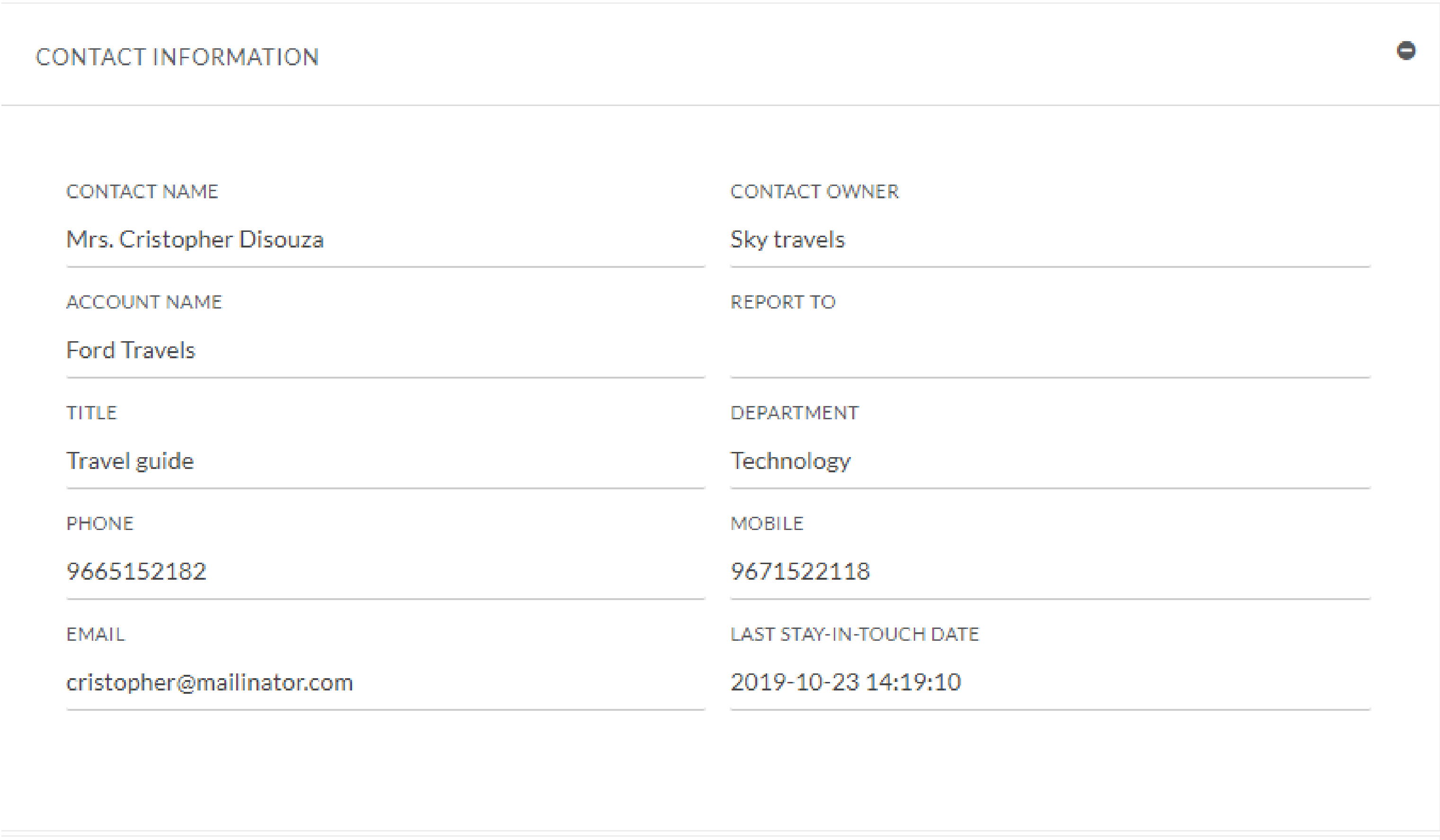
• 'Details' Section

This section contains extra information about the contact. It can be used to access address, system and contact details.



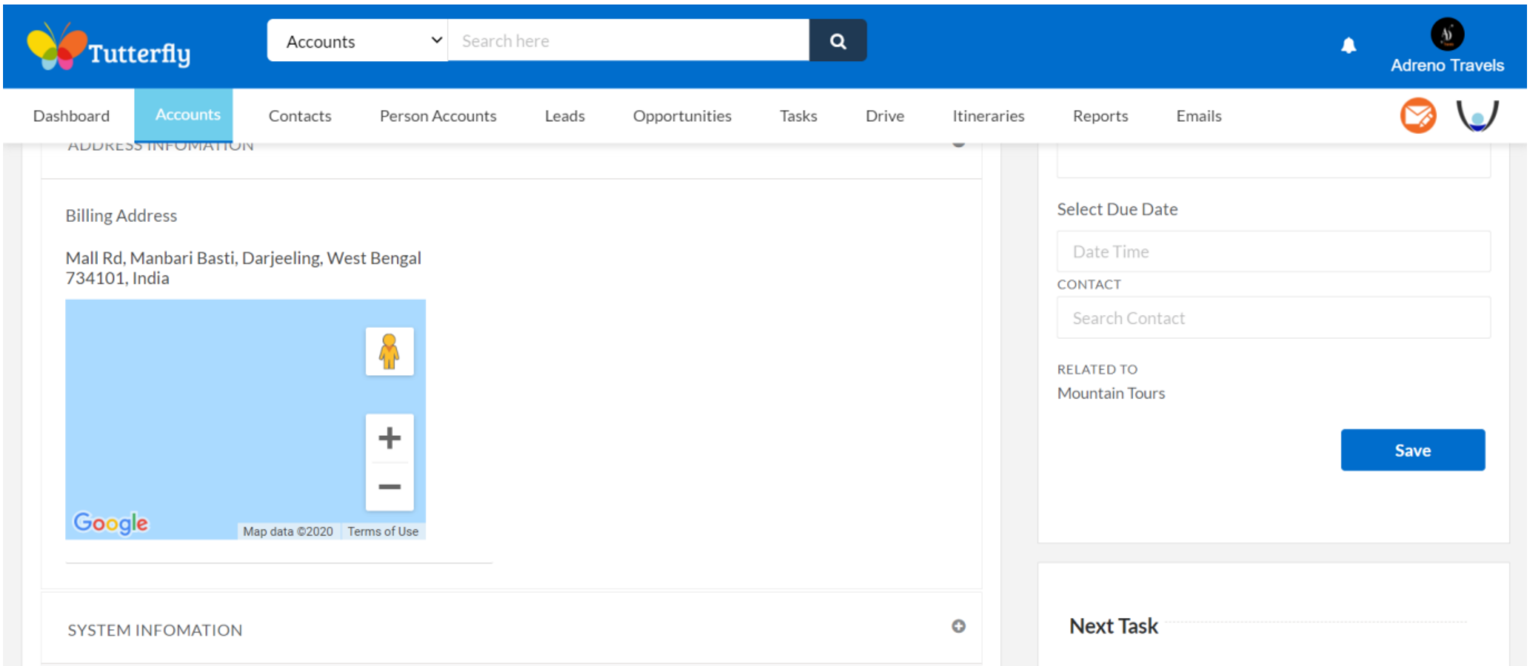
Contact Information

This section contains information about the current account. Information like contact name, owner, account name, title, department, mobile, etc.



Address Information

This mentions the geographical location of the address of contact in a map.



System Information

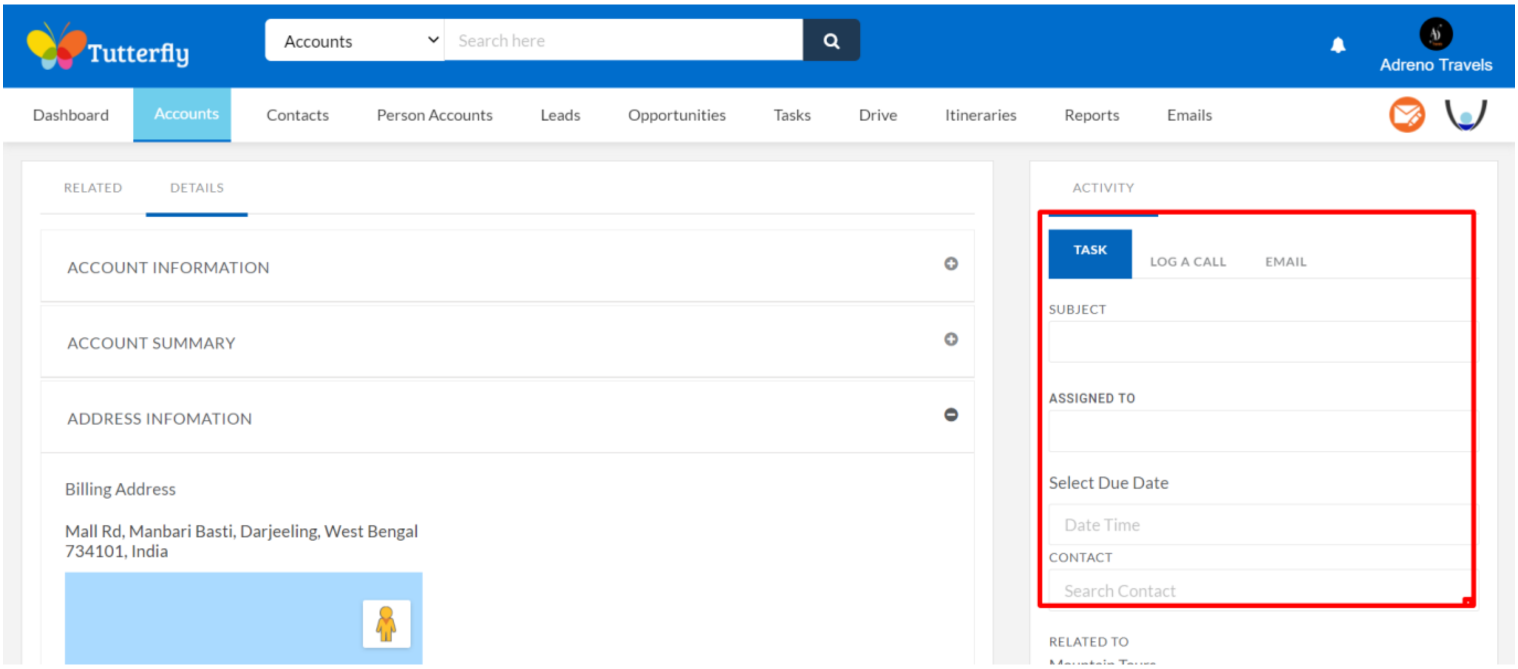
This is the final one! This display details of the user who “Created” and “Last Modified” the account. It also mentions the date and time of changes made.

• How to Work on the Activity Section in the ‘Contacts’?

Ever wondered what smart working looks like? Our Activity Section is your quick work hub. Find out here how to create tasks, save call logs, create event, and email.

Task

This is a list of to-do items that is created in TutterflyCRM. A user can assign tasks to any of the other users. The user can also set a due date to define a time limit for completing the task.



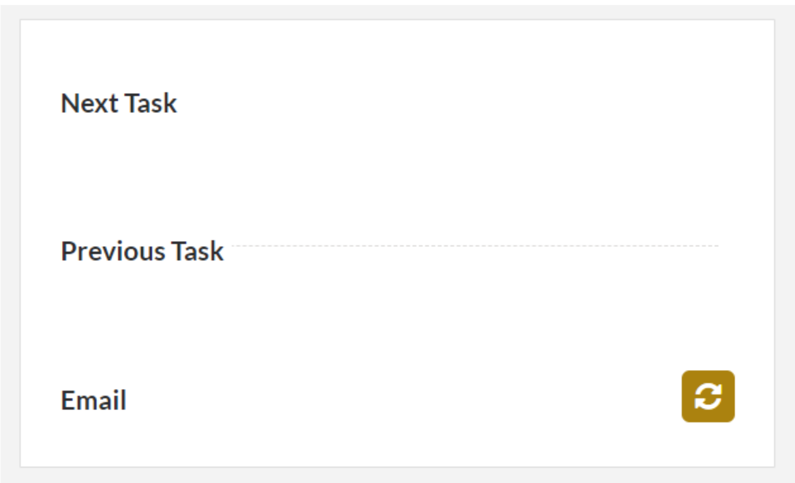
Log A Call

TutterflyCRM allows a user to log calls and take notes on the conversation.

Email

Users can communicate and collaborate through emails in TutterflyCRM. While creating emails, a user can select default template created by the admin.

Functions:



Next Task

It is a list of all the open tasks assigned to the user for this contact. It will display top six tasks that still queued.

Previous Task

This shows all the closed tasks that have been completed and are closed.

Email

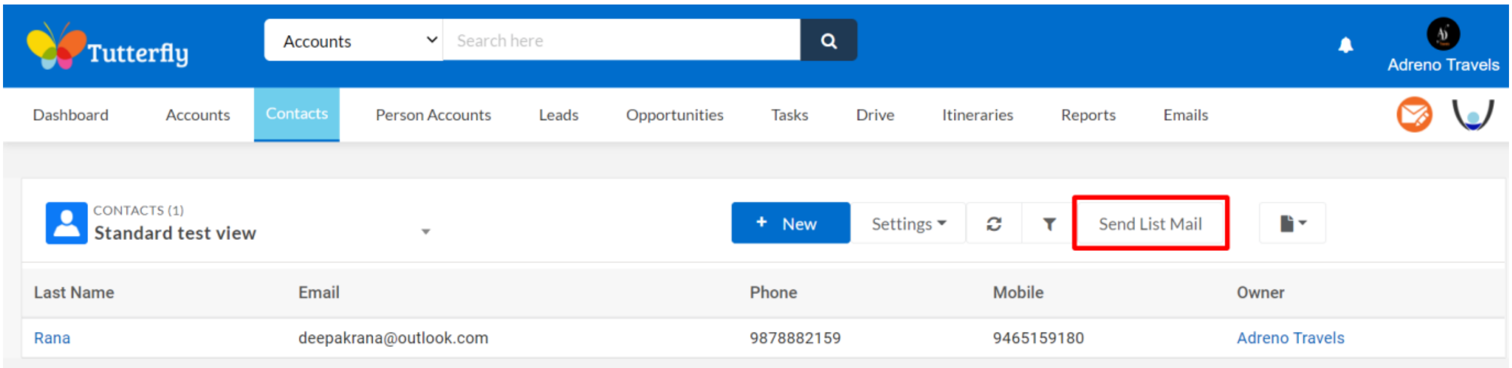
This is the last one! TutterflyCRM shows the list of emails sent by a user associated with the selected contact.

• Send Bulk Emails in 'Contacts' Section

Ready to learn about sending multiple emails to all contacts? Continue reading to find out all about it.

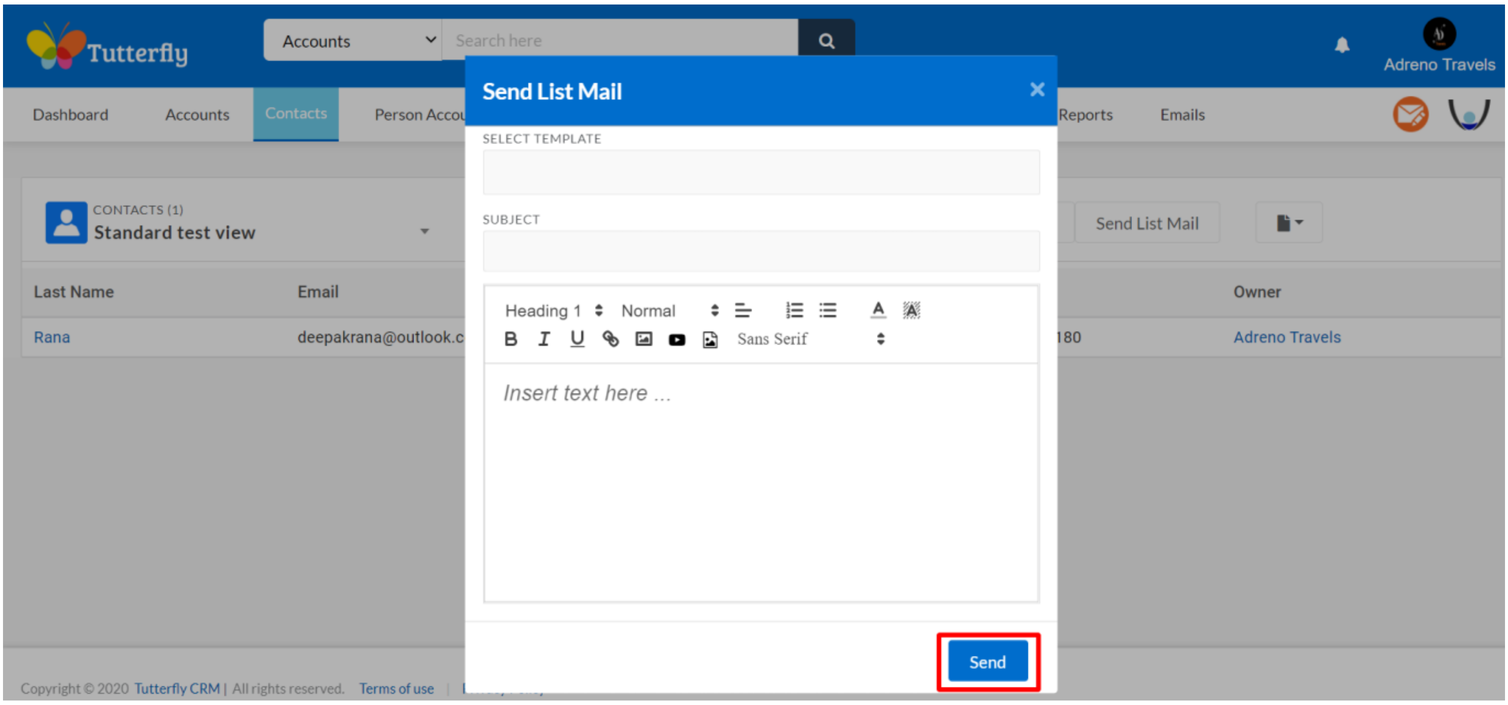
Step 1: Go to TutterflyCRM and click on 'Contacts' tab.

Step 2: Switch to any view other than the default. The list of emails can be sent through any view other than the default.



Step 3: Great! We are at the end of learning all about this process. Click on the **'Send List Mail'** option.

Step 4: This is the final step! Select a template and subject. Make changes on the email body section. Click on **'Save'** button.



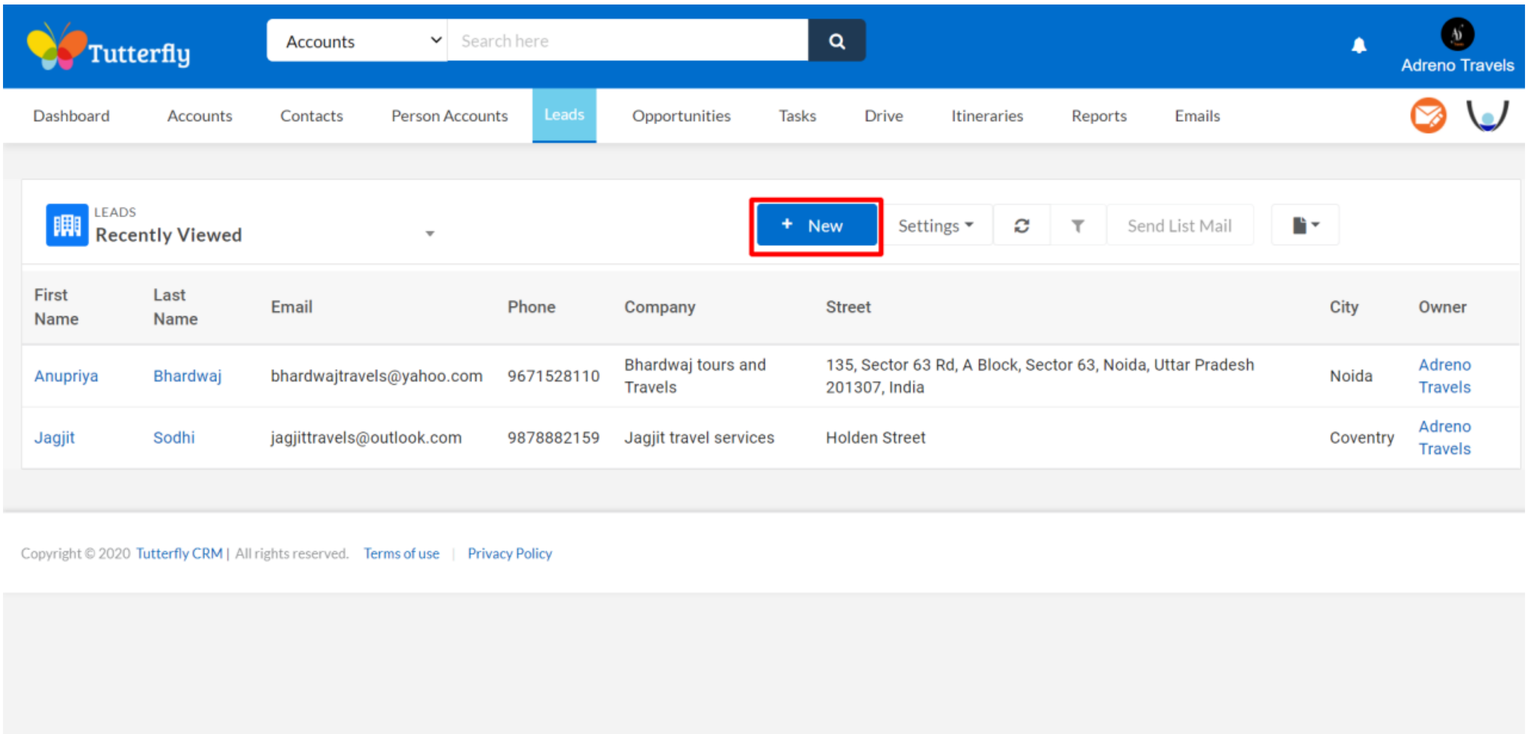
Find out exactly how to create a Lead by following the steps below:

• What are Leads?

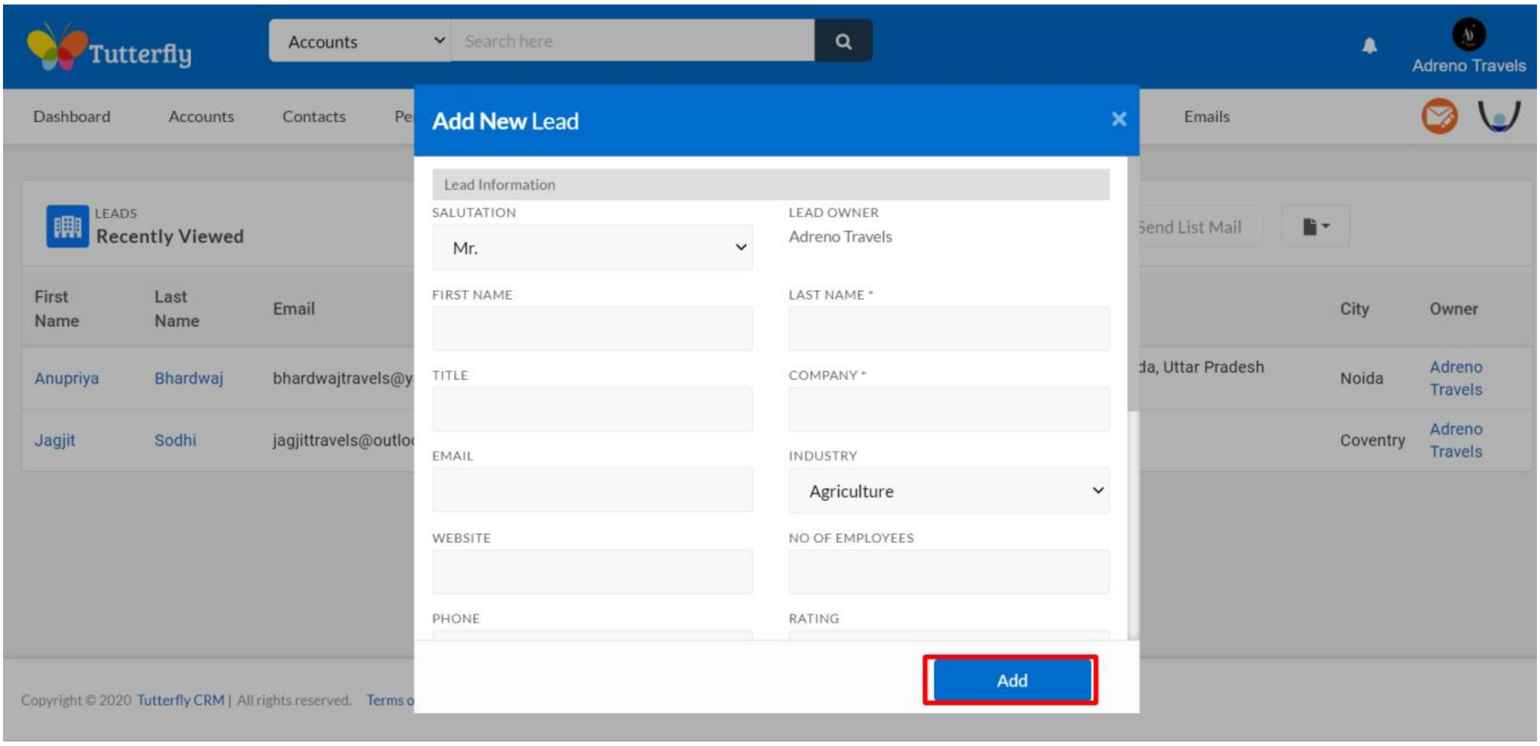
Leads are business prospects whose probability of conversion is 50-50. Once these Leads mature, we record them as part of accounts and contacts. TutterflyCRM considers the Lead's first name as a contact and Lead's source company as an account.

Create New Leads

Step 1: Go to **'Leads'** and click on **'+New'** button.



Step 2: Fill in all the details. The **'Last Name'**, **'Company'** and **'Lead Status'** are important fields.



Lead Status

Lead status is the terminology used to identify each Lead uniquely based on the progress it has made with your company. This shows the current running stage of a Lead.

Contacted: This implies that the team has just contacted a potential Lead.

Open: This is the stage after contacting, and this shows that the company is communicating with the Lead.

Qualified: This shows that the Lead has matured and turned into a business for the organization.

Unqualified: This shows that ongoing communication has not worked out, and we now consider the Lead defunct.

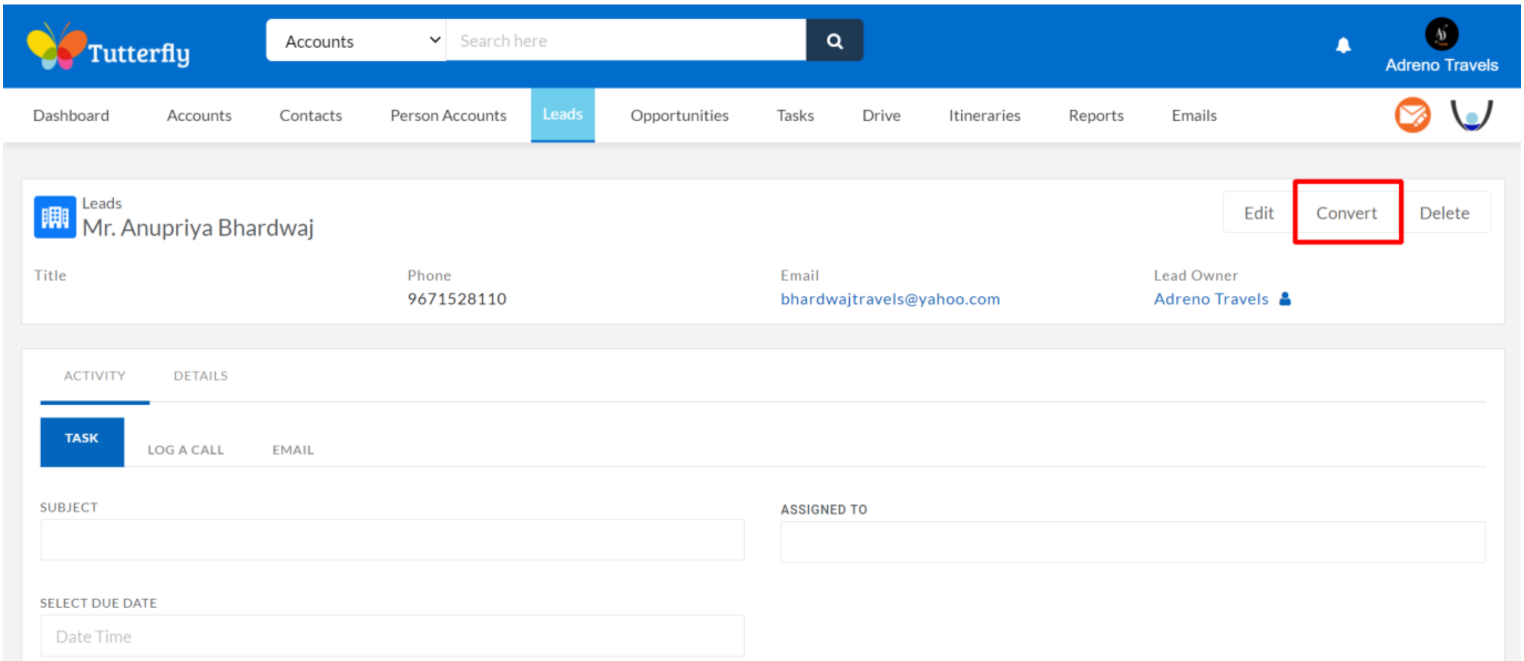
Note: While typing in Address Information text box, suggestions will appear. Use them to auto-complete the address section.

Step 3: This is the last one! Once you have filled in all the parameters, click on the 'Add' button to add a new Lead into TutterflyCRM. A message box will appear as shown in the image below:

• How to Convert a Lead?

Learn about converting leads to 'Accounts' and 'Contacts' by reading the steps below:

Step 1: Click on the name of the leads listed in the 'Leads' tab. This will display a page with details regarding the Lead.

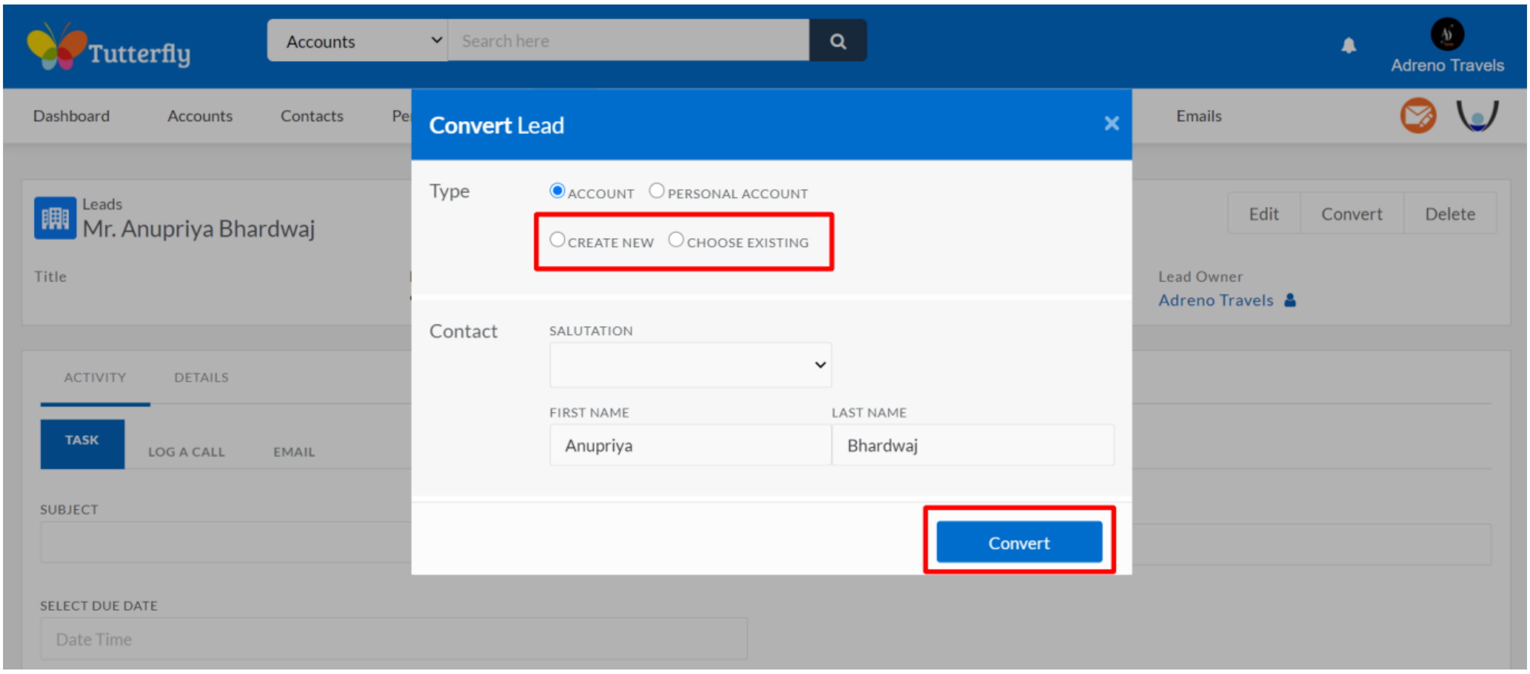


Step 2: Click on the **'Convert'** button.

Step 3: From the 'Convert Lead' box, choose the appropriate option and fill in the rest of the details.

- **Create New:** Type in the name of the new account.

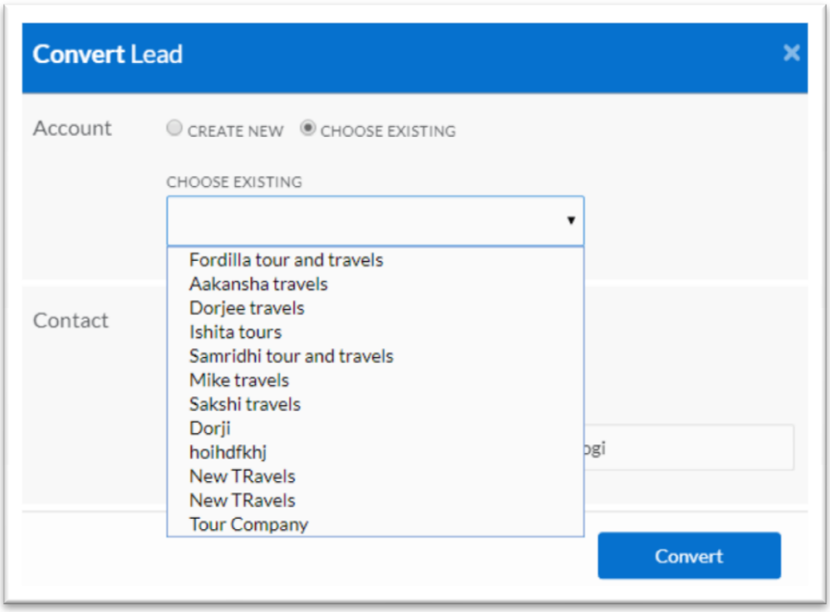
- **Choose Existing:** From the drop-down box, select a pre-existing account name.



Step 4: If you choose **'Create New'** a new **"Account Name"** box will appear. What you type will be added as a new Account in TutterflyCRM. A new Contact record gets created with the first name and last name entered in **"Contact"** section.

Sai Tours & Travels (Amravati) check		K-18,First Floor,Khatri Complex,Walcut Compound	Amravati	Travel Agent	Samar Travels
3A Travels Pvt Ltd test	761 - 4004455	Hotel Krishna Complex Opp. Museum Napier Town	Jabalpur	Travel Agent	Samar Travels
3A Travels Pvt Ltd check	761 - 4004455	Hotel Krishna Complex Opp. Museum Napier Town	Jabalpur	Travel Agent	Samar Travels
Say 4 Travel test	1716551771	MakeMyTrip.com,Booth no-1,Sec21,opp Sec 9,Peer Baba Vatika Road Ambala City - 134003,India	Ambala	Travel Agent	Samar Travels
Say 4 Travel check	1716551771	MakeMyTrip.com,Booth no-1,Sec21,opp Sec 9,Peer Baba Vatika Road Ambala City - 134003,India	Ambala	Travel Agent	Samar Travels
My Trip Dzire test	20 4678 2000	Shop No. 13,Bldg ?A?,Empire Estate,Primier City,Chinchwad,	Pune	Travel Agent	Samar Travels
My Trip Dzire check	20 4678 2000	Shop No. 13,Bldg ?A?,Empire Estate,Primier City,Chinchwad,	Pune	Travel Agent	Samar Travels
Larsen and toubro	9878882159	163 Central Arcade DLF Qutab Enclave Phase II Gurgaon 122002	Delhi	Supplier	Samar Travels
Vinayak Tours	9878882159	163 Central Arcade DLF Qutab Enclave Phase II Gurgaon 122002	Delhi	Supplier	Samar Travels
Siddhi tours and travels	9878882159	163 Central Arcade DLF Qutab Enclave Phase II Gurgaon 122002	Delhi	Supplier	Samar Travels
Rakesh tours and travels	9878882159	163 Central Arcade DLF Qutab Enclave Phase II Gurgaon 122002	Delhi	Supplier	Samar Travels
Vinayak Tours	9878882159	163 Central Arcade DLF Qutab Enclave Phase II Gurgaon 122002	Delhi	Supplier	Samar Travels
Vinayak Tours	9878882159	163 Central Arcade DLF Qutab Enclave Phase II Gurgaon 122002	Delhi	Supplier	Samar Travels
Vinayak Tours	9878882159	163 Central Arcade DLF Qutab Enclave Phase II Gurgaon 122002	Delhi	Supplier	Samar Travels
Siddhi Travels	9878882149	George St, Sydney NSW 2000, Australia	Sydney	Corporate Client	Aakansha travels
Anshika tour and travels	7696015059	963 Hall Valley Dr, Bridgeport, WV 26330, USA	Bridgeport	Travel Enterprise	Shivangi Rai

Step 5: If you select **"Choose Existing",** a drop-down box will appear. Select one from the list.



Step 6: Fill in the contact information as well.

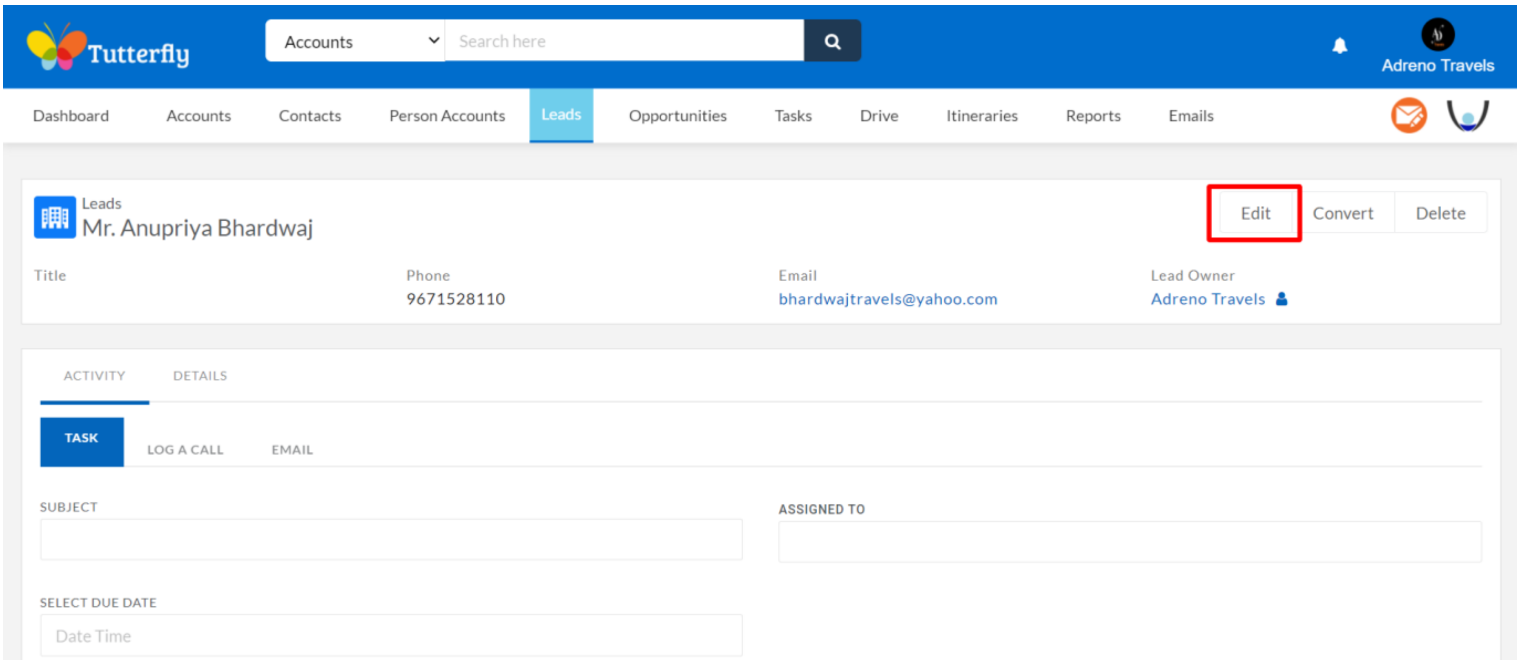
Step 7: A new contact will be created for the contact as mentioned below.

Step 9: Finally! This is the last step. A message box will appear indicating that your Lead has been successfully converted.

• How to Edit a Lead?

Make changes in your business Leads in TutterflyCRM easily by following these steps:

Step 1: Start by clicking on the link on the Last Name field on the 'Leads' section. This will display a new page with all the properties of a Lead.



Step 2: You can find the Edit button on the top-right corner. Click on it to proceed to the next step.

Step 3: Great! We are just one step away from finishing this off. Now, from the "Edit Account" window, change the field's necessary and click on the 'Add' button.

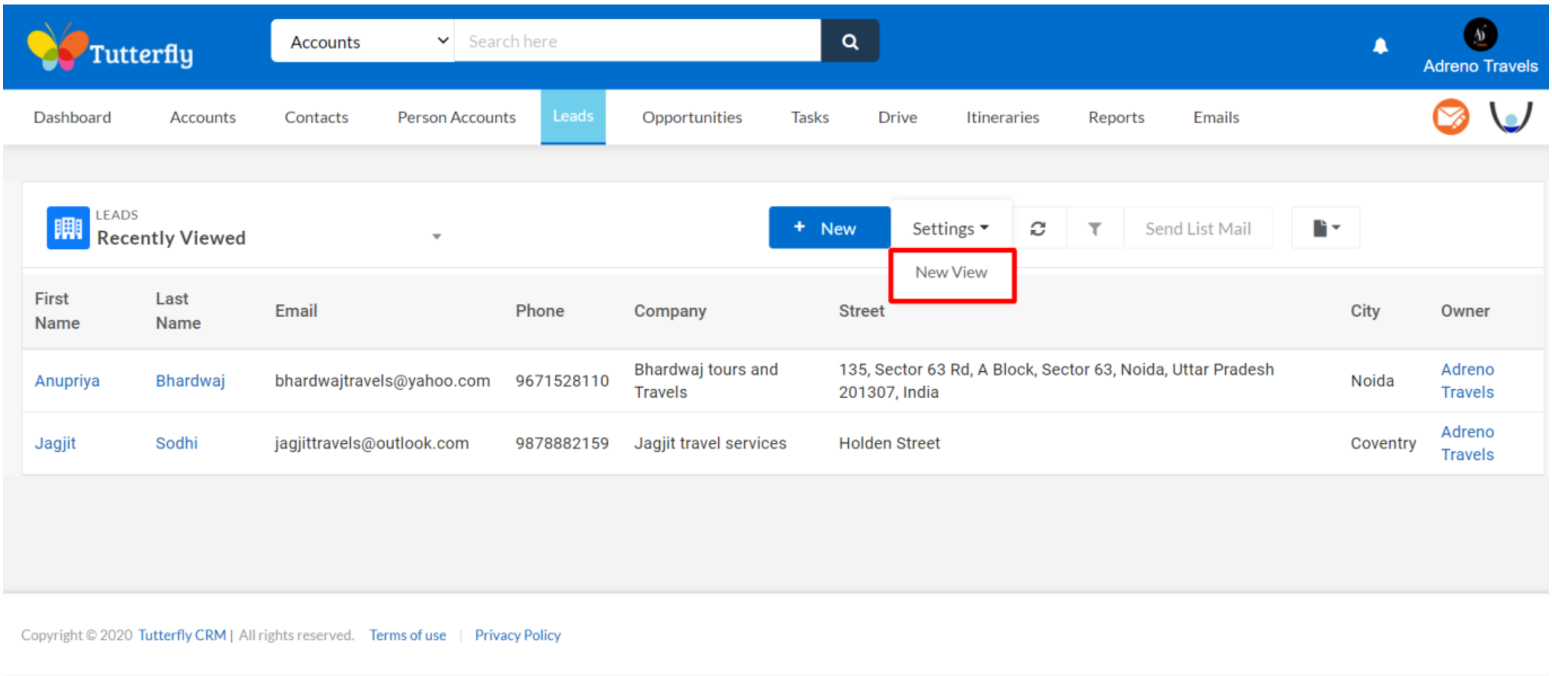
Note: While filling in the address information, TutterflyCRM shows suggestions for city, country and ZIP Code. Make use of them!

Step 4: Hurray! We are in the last part. A message box will appear confirming that the edits have been made successfully to the Lead account.

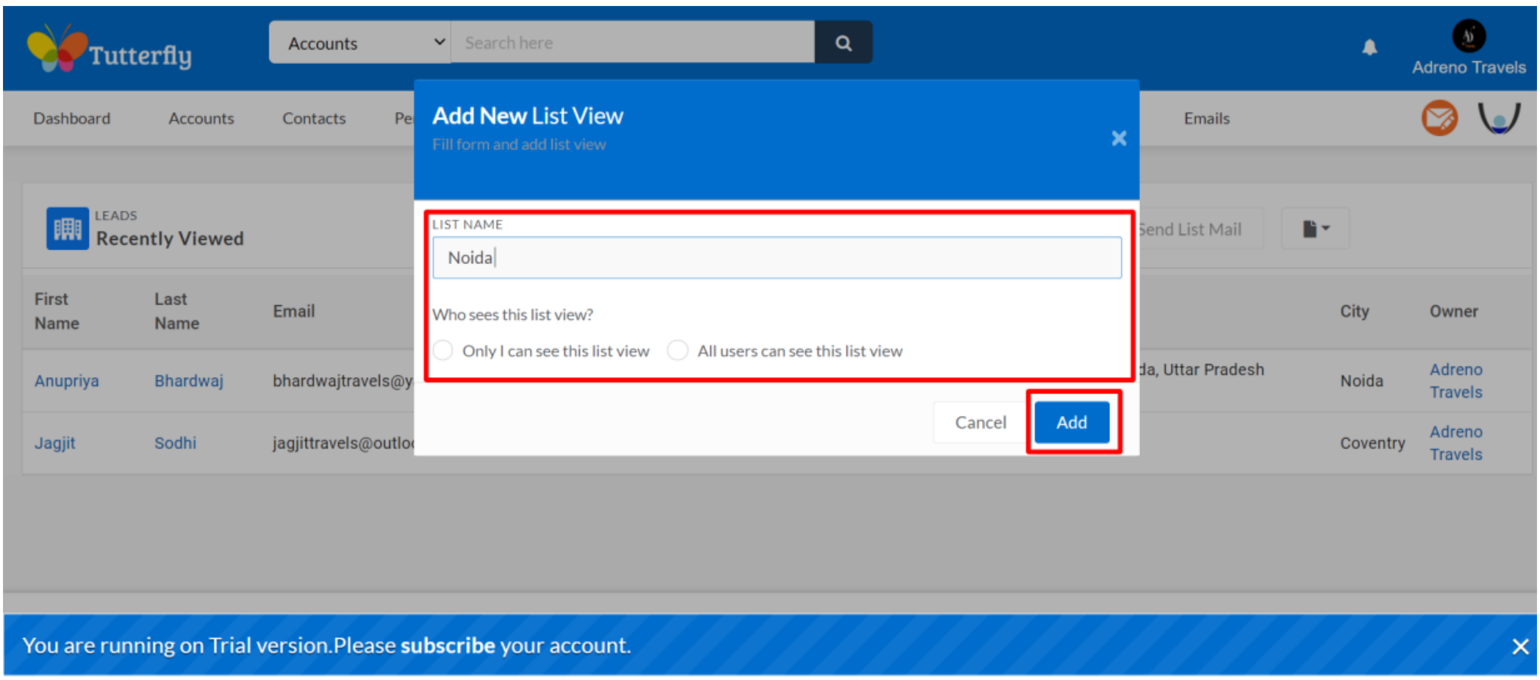
• Create a New View in Leads

Manage multiple leads with ease. Continue reading to find out how to create 'Filters' and 'Sharing Settings' to speed up the entire sales process!

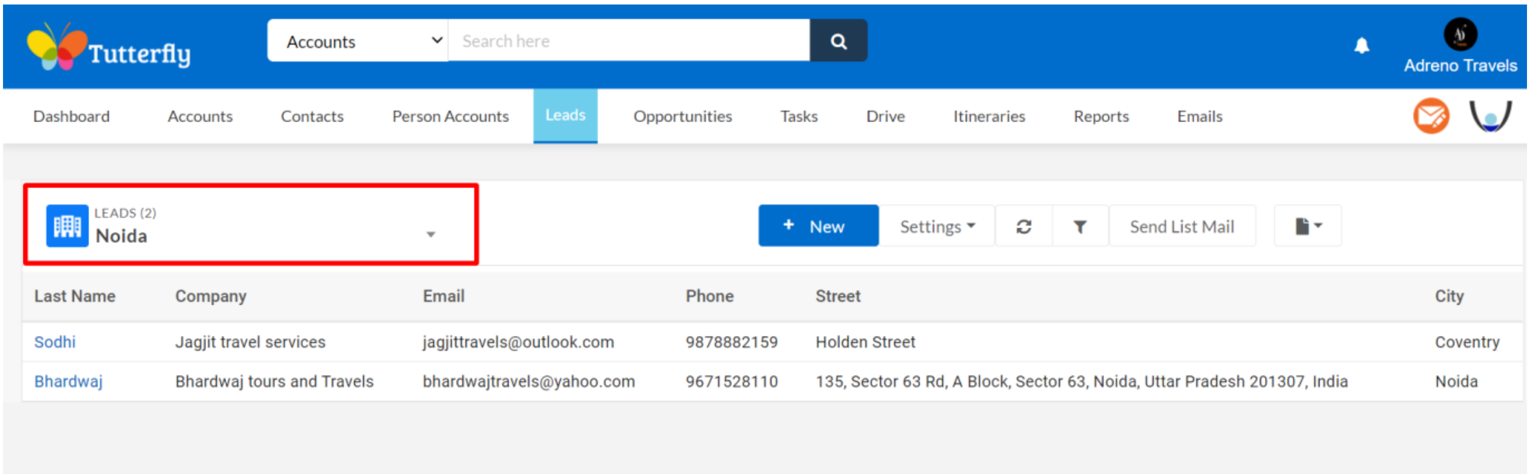
Step 1: Click on the **Settings >>** New.



Step 2: TutterflyCRM will display a window that will appear like the following image:

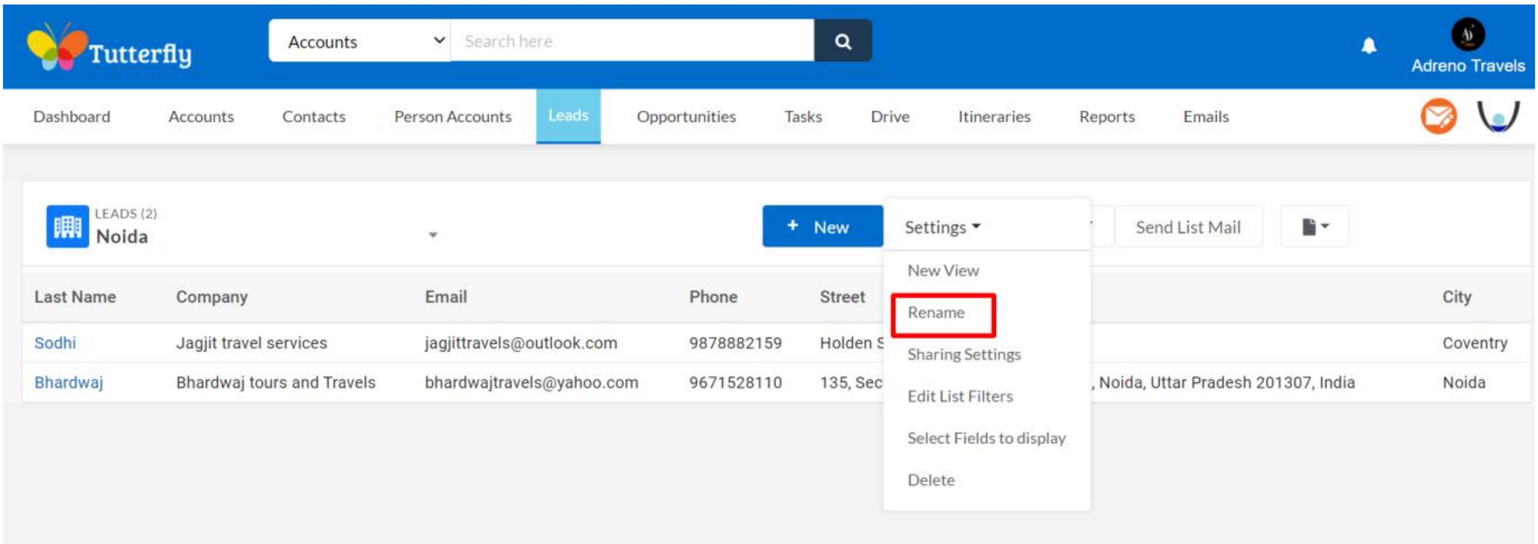


Step 3: Click on the **'Add button'**. The new View gets added to the list of Views displayed in the top-left corner, just like the image below:

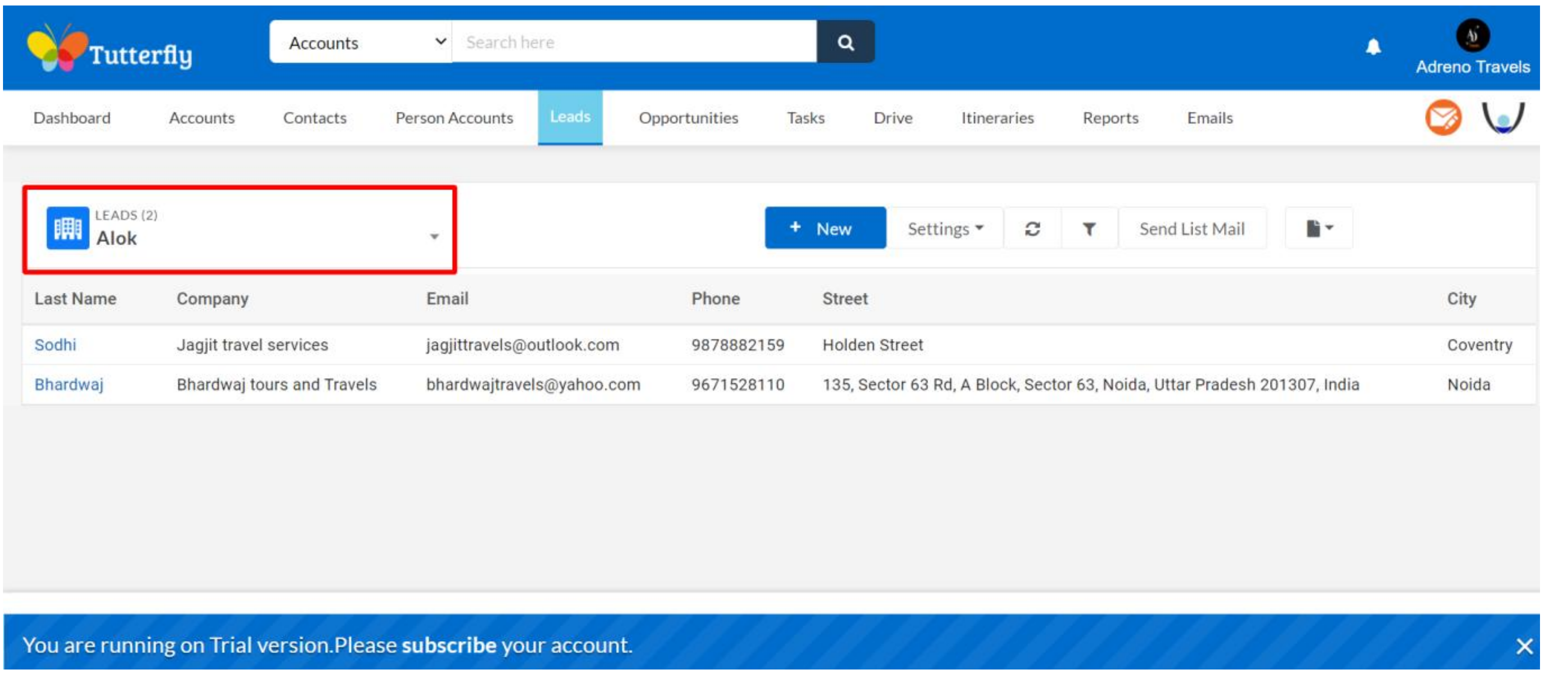


Rename the List-View

Step 1: Go to **Settings >>** Rename View.



Step 2: From the **'Rename List-View'**, retype the 'List Name' and click on **'Save'** button.

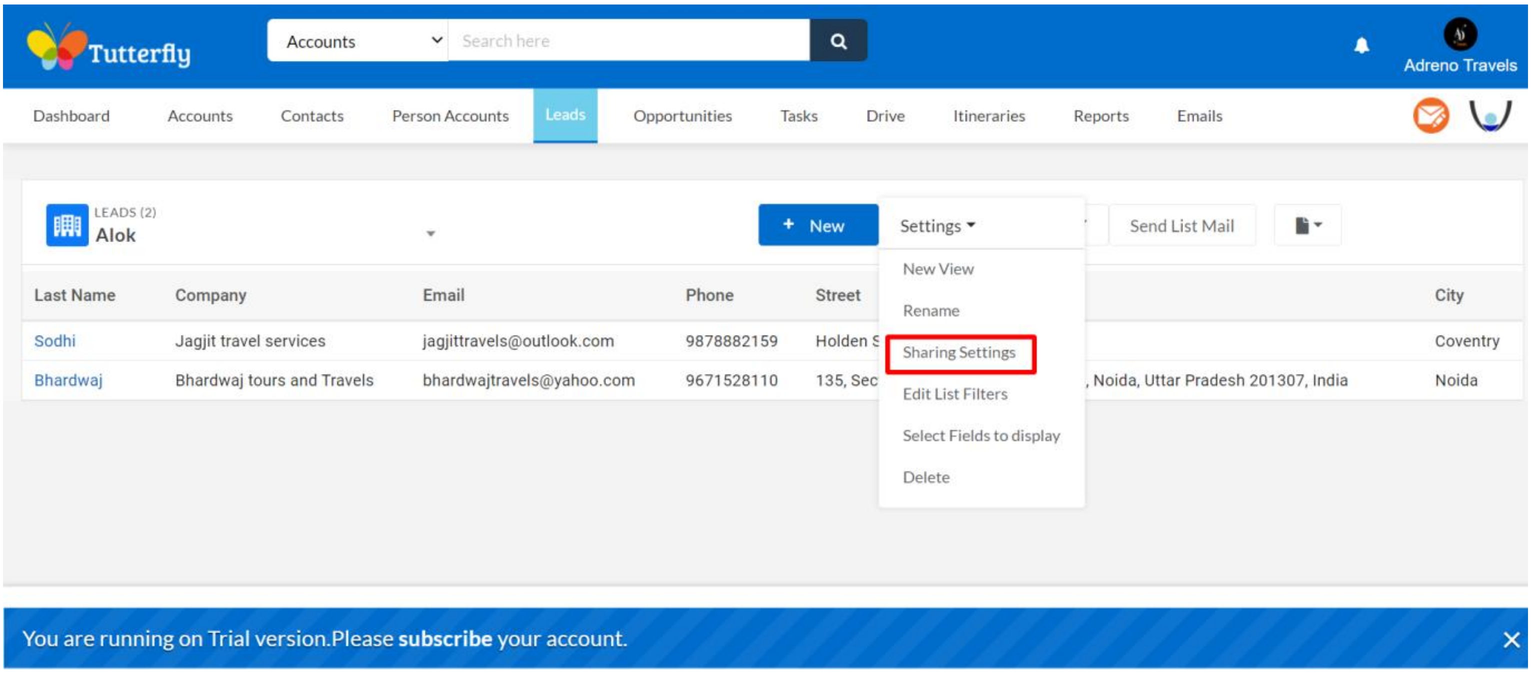


Note : A message box will appear confirming that the changes have been made in TutterflyCRM.

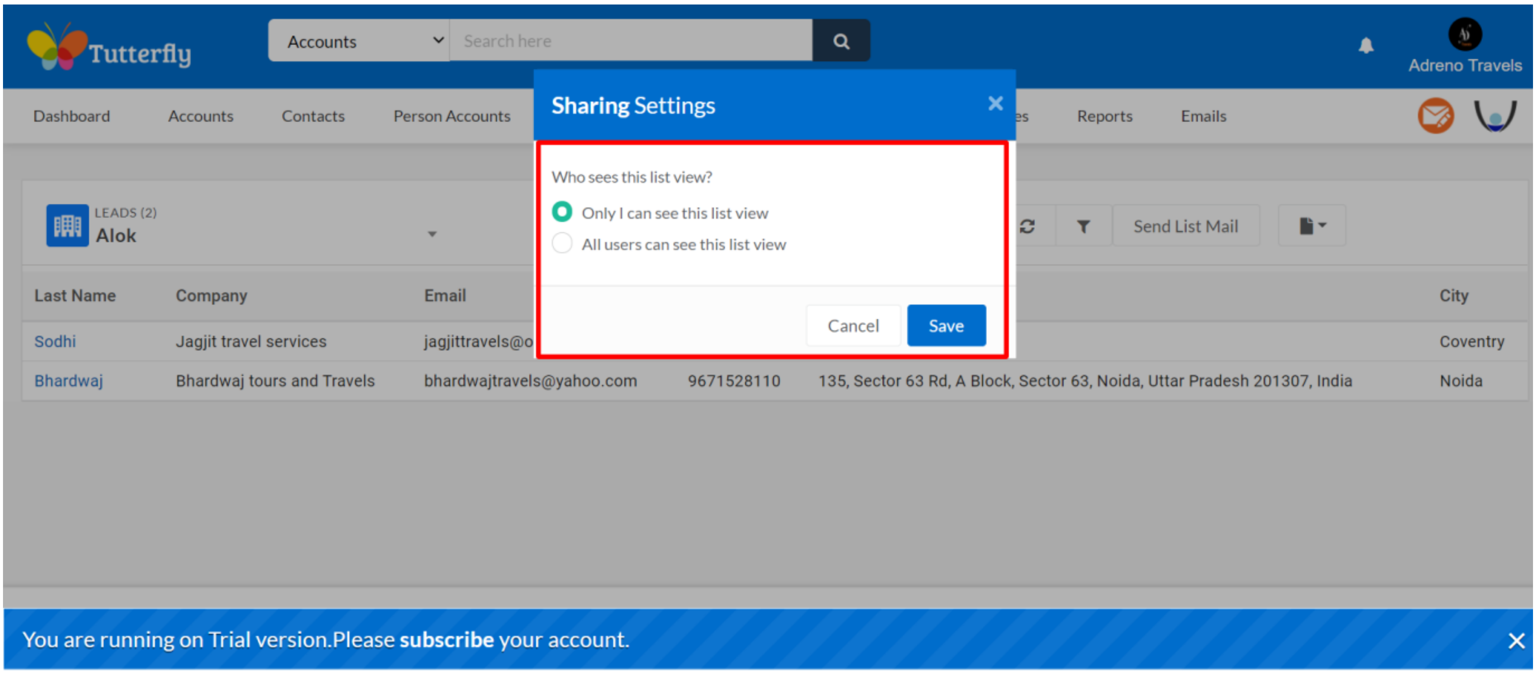
Change the Sharing Setting

In TutterflyCRM, a user can control access to some parts of the data by using share settings. Listed below are steps to limit other users from accessing important data.

Step 1: Go to **Settings >>** Sharing Settings.



Step 2: A box will appear like the one shown in this image below:



Step 3: From the **'Sharing Settings'** box, select the options to set the privacy level.

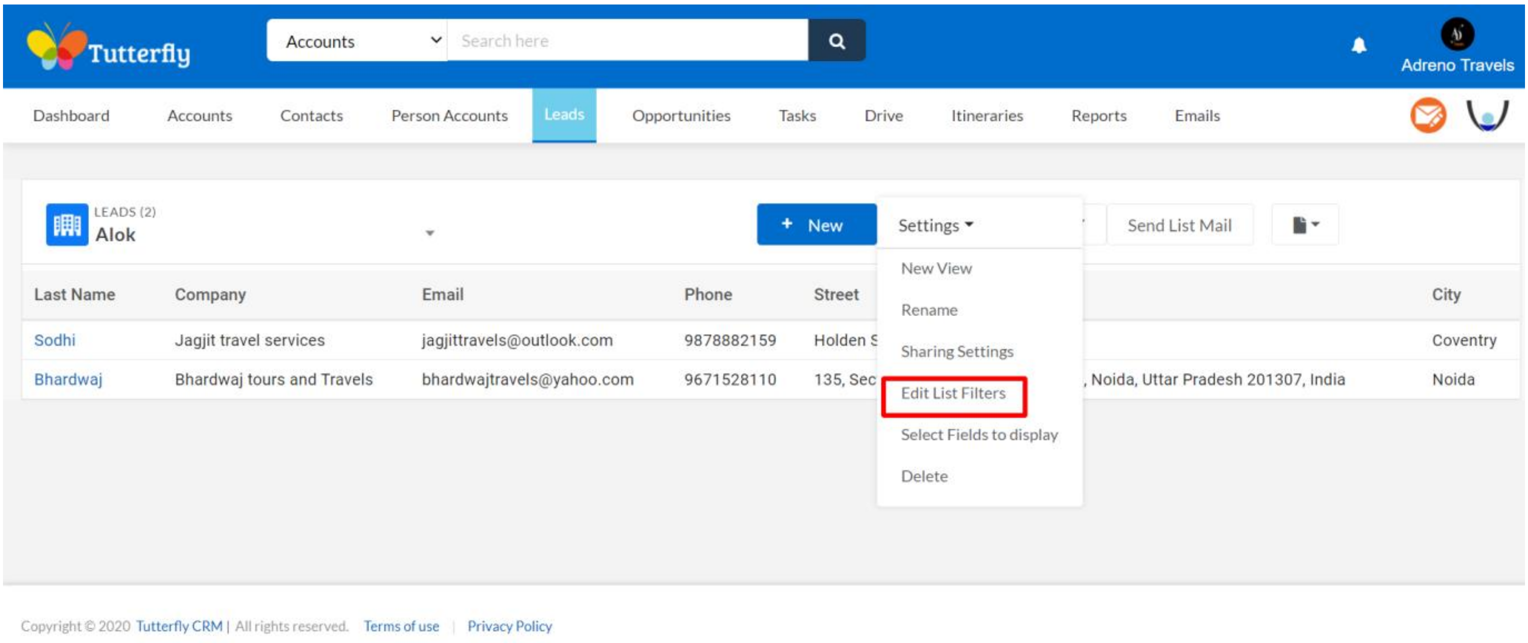
All Accounts: A user can apply a filter to View all the Leads created by the admin and other agents.

My Accounts: A user can apply a filter to View only the Leads created by the user.

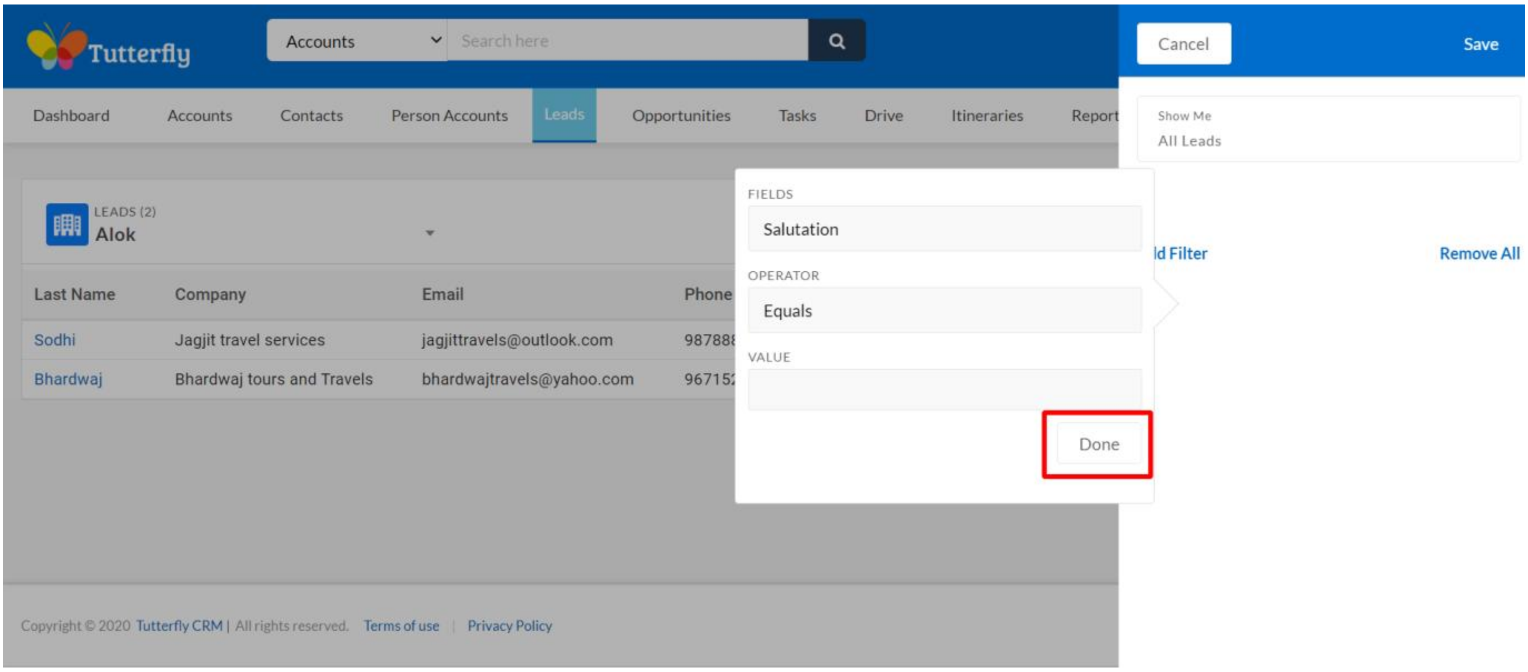
Step 4: Next, click on the 'Save' button. A message box will appear confirming that the changes have been made.

Edit List Filters

Step 1: Go to **'Settings'** and click on **'Edit List Filters'**. A pop-up will appear in the right.



Step 2: A pop-up will appear in the right corner. Click on the **'Add Filter'** option.



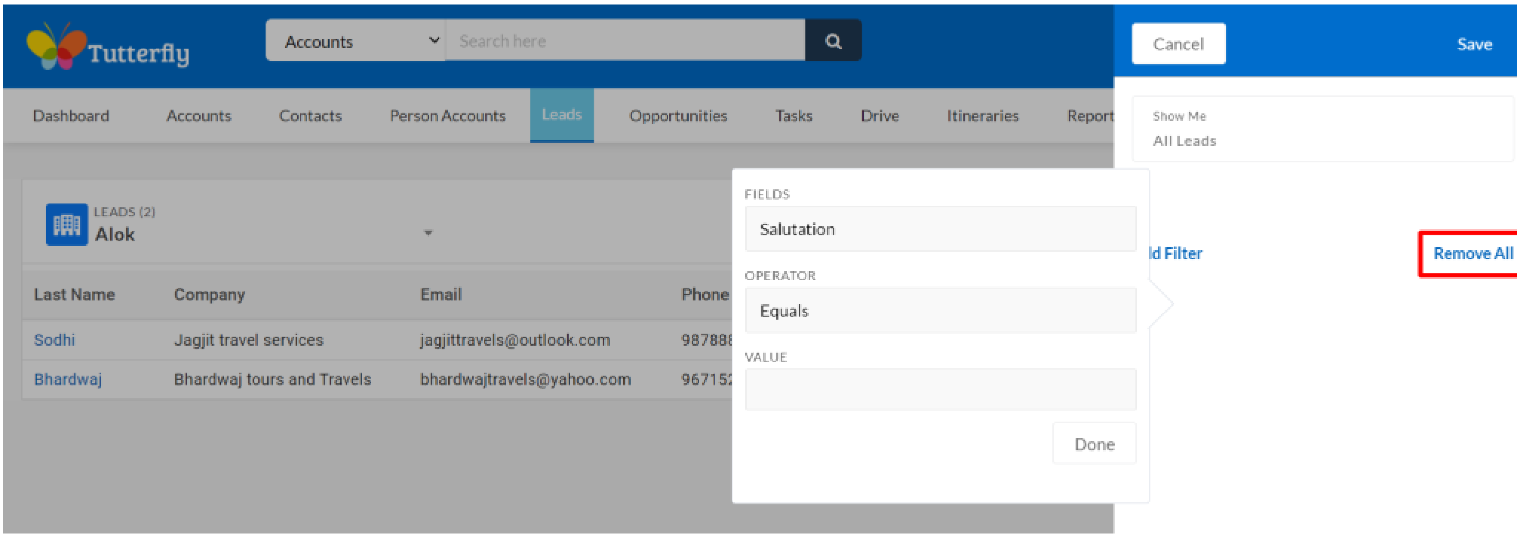
Step 3: Click on **'Add Filter'** and fill in details such as a field, operator, and value. Next, click on the **'Done'** button.

Step 4: Click on the Save button.

Note: This filter can also be applied using the filter icon on the main **'Leads'** page.

Remove an Existing Filter

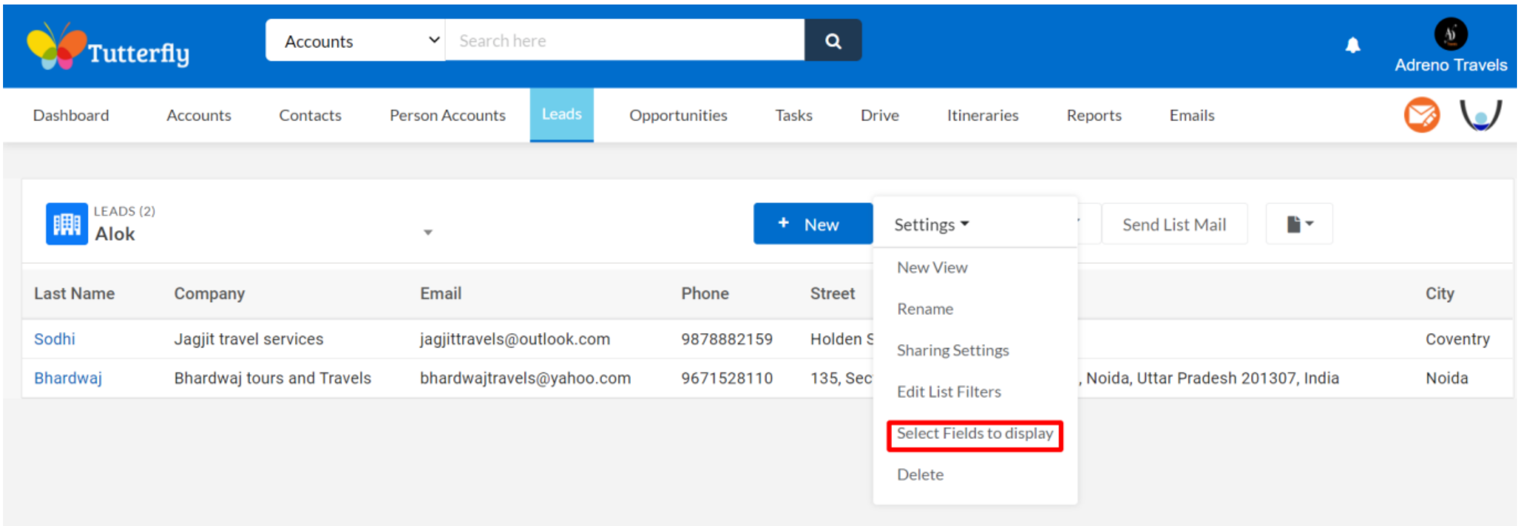
Step 1: There is another option to clear an existing filter by clicking on the **'Remove All'** link in the far right corner.



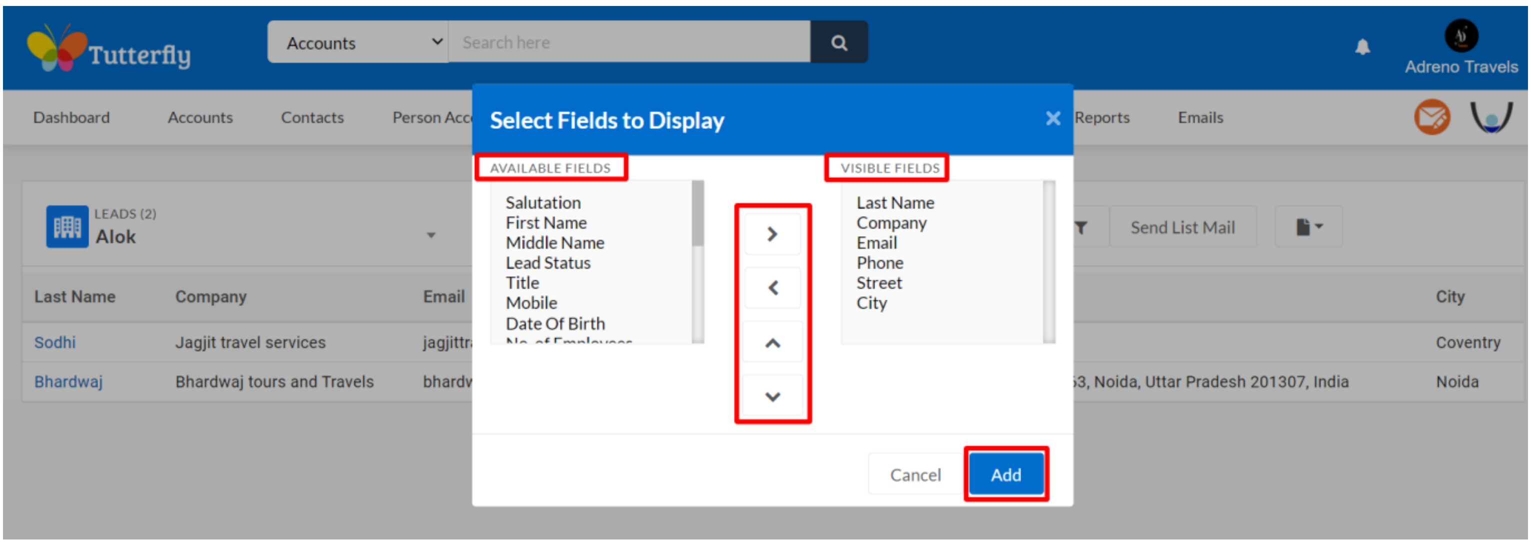
Step 2: Click on **'Save'**, to save the changes made.

Select Fields to Display

Step 1: Click on **Settings >>** Select Fields to Display.



Step 2: From the **'Select Field to Display'** box, choose **'Available fields'** to add a new **'Visible Fields'.**



Step 3: Next, click on the **'>'** button to add available fields to visible fields. This action can be used to add or remove columns that will be shown in the view. Similarly, to remove a 'Visible Field', select them one at a time and click on the **'<'** button. We are almost near the finishing line! Now, to define the column placement of each field in a view, use the 'up' and **'down'** arrows.

At last! Click on the **'Add'** button to proceed with the action of adding new or 'Cancel' to remove any changes made.

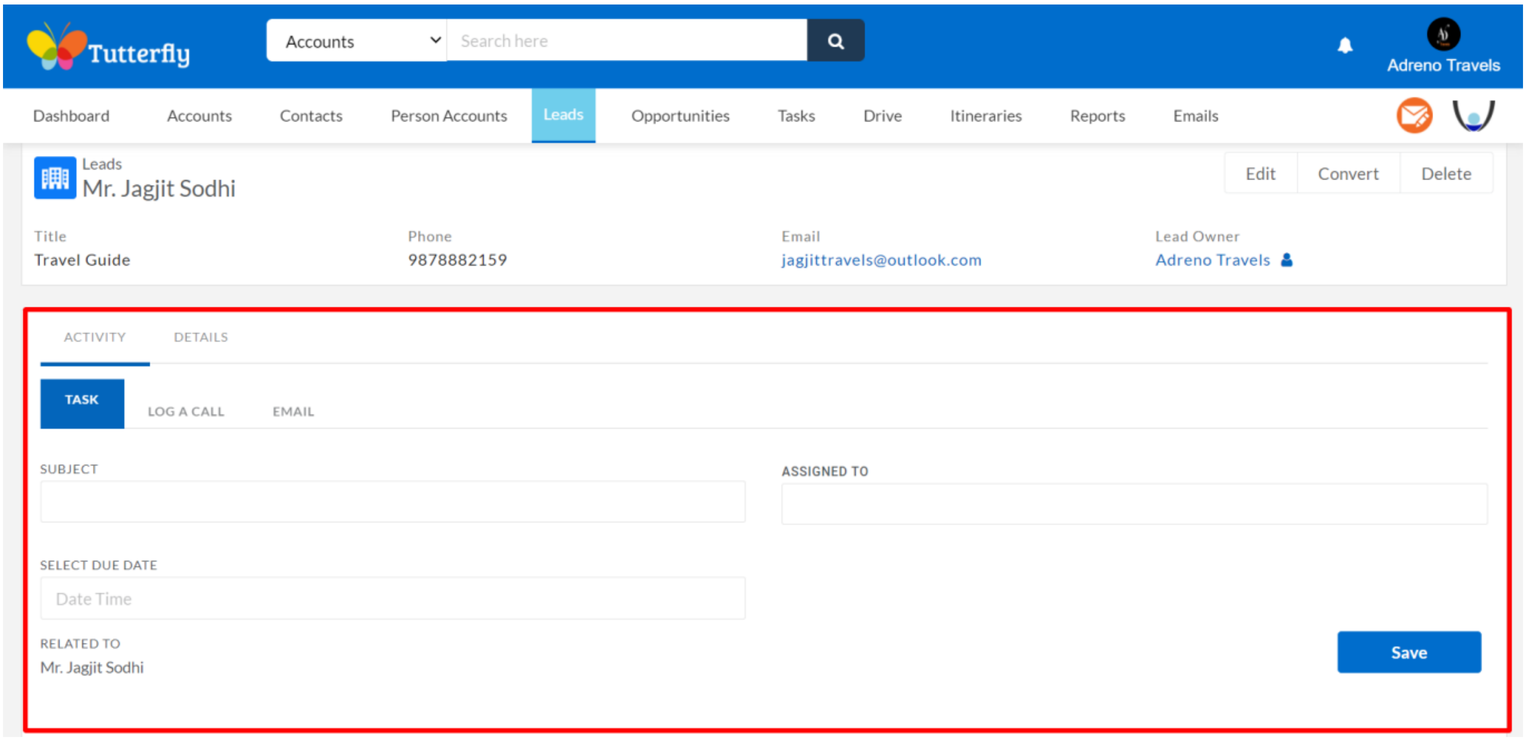
Note: All these filters can only be applied to Views created manually and not on 'Default' View.

• How to Use Activity Section in Leads?

Grow your business exponentially by building customer relationships. This can be achieved by communicating through email, tasks and call logs. Read on!

Tasks

Tasks are a to-do listing that can be created in TutterflyCRM. A user can assign tasks to any of the other users. The user can also set due date to define a time limit for completing the task.



After filling out information just simply click on Save and the message box will appear confirming that a task has been created.

Call Logging

A user can enter telephonic conversations in text format using TutterflyCRM. We can use it to review information for the future.

Email

Users can communicate and collaborate through emails in TutterflyCRM. While creating emails, a user can also select different templates created by the admin.

Next Task

This is a list of all the open tasks assigned to the user for this Lead. It will display the top six tasks that still have time to complete.

Previous Task

This represents all the closed tasks that are completed.

Email

This is the final one! This displays all the logs made through email communication.

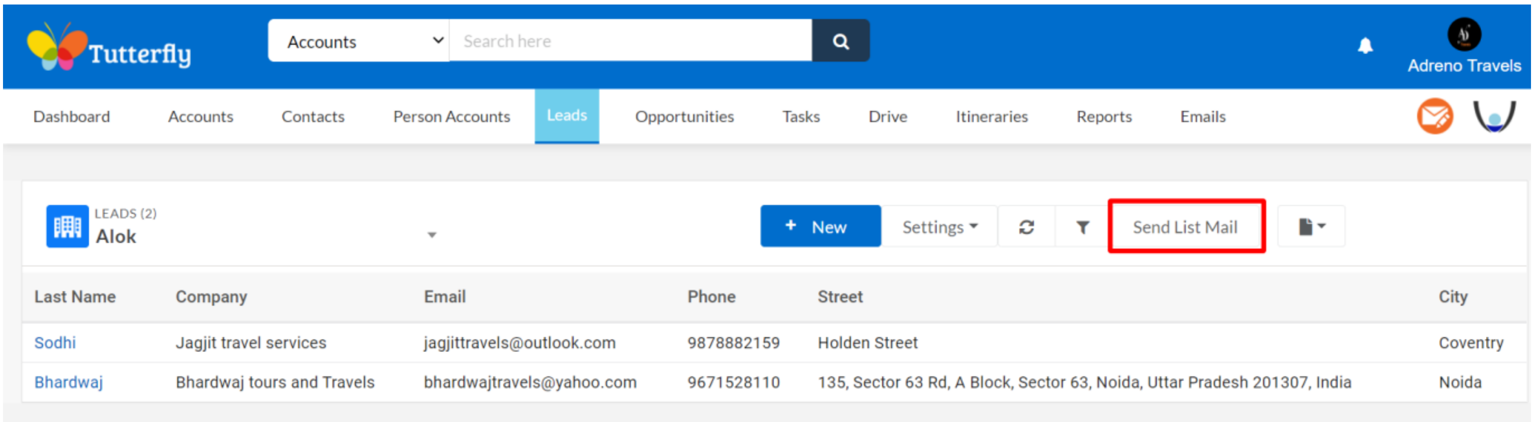
• Send Bulk Emails in ‘Leads’ Section

Send a common message to all your contacts quickly by following the steps below:

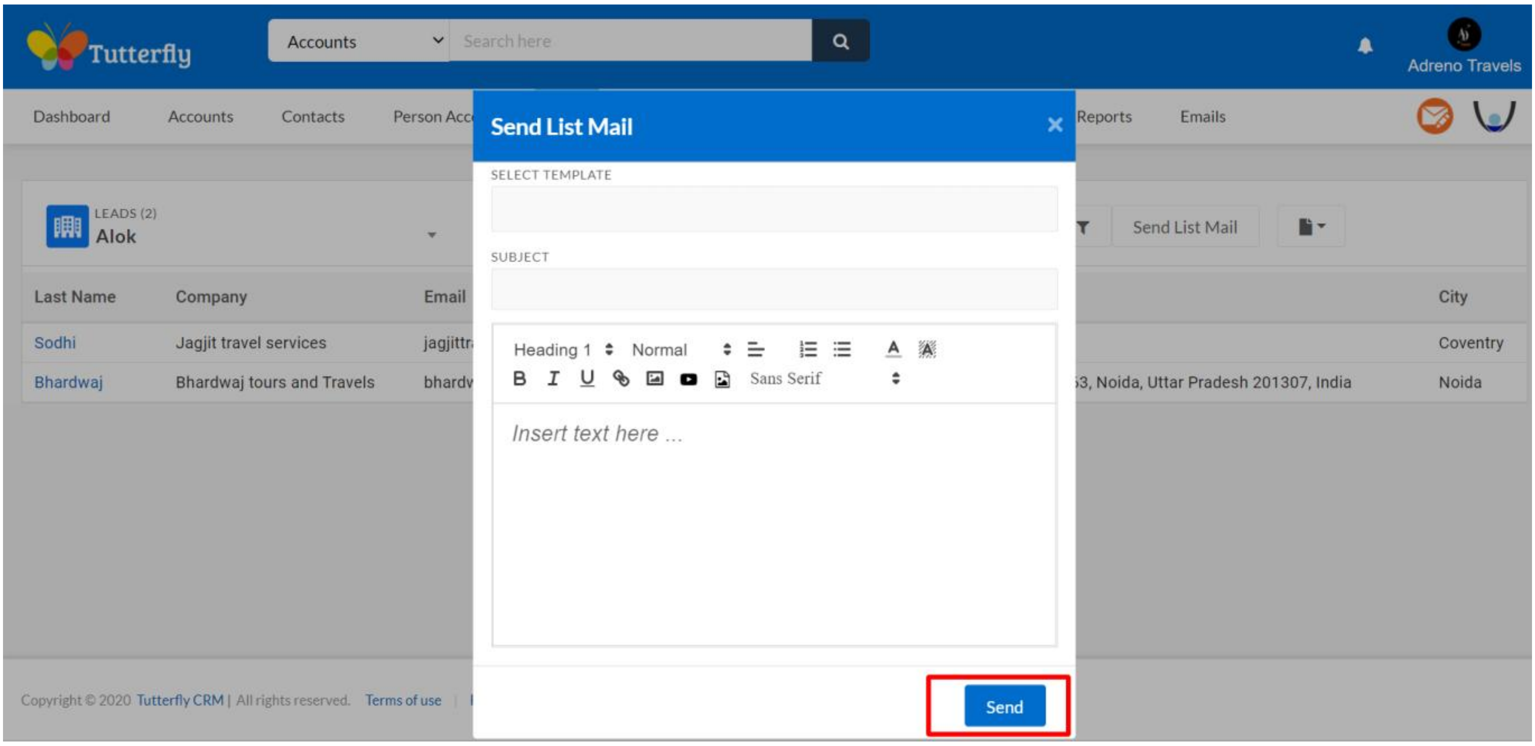
Step 1: Go to TutterflyCRM and click on the **‘Leads’** tab.

Step 2: Switch to any view other than the default one. The list of emails can be sent through any view other than the default.

We are almost at the end. Click on the **‘Send List Mail’** option.

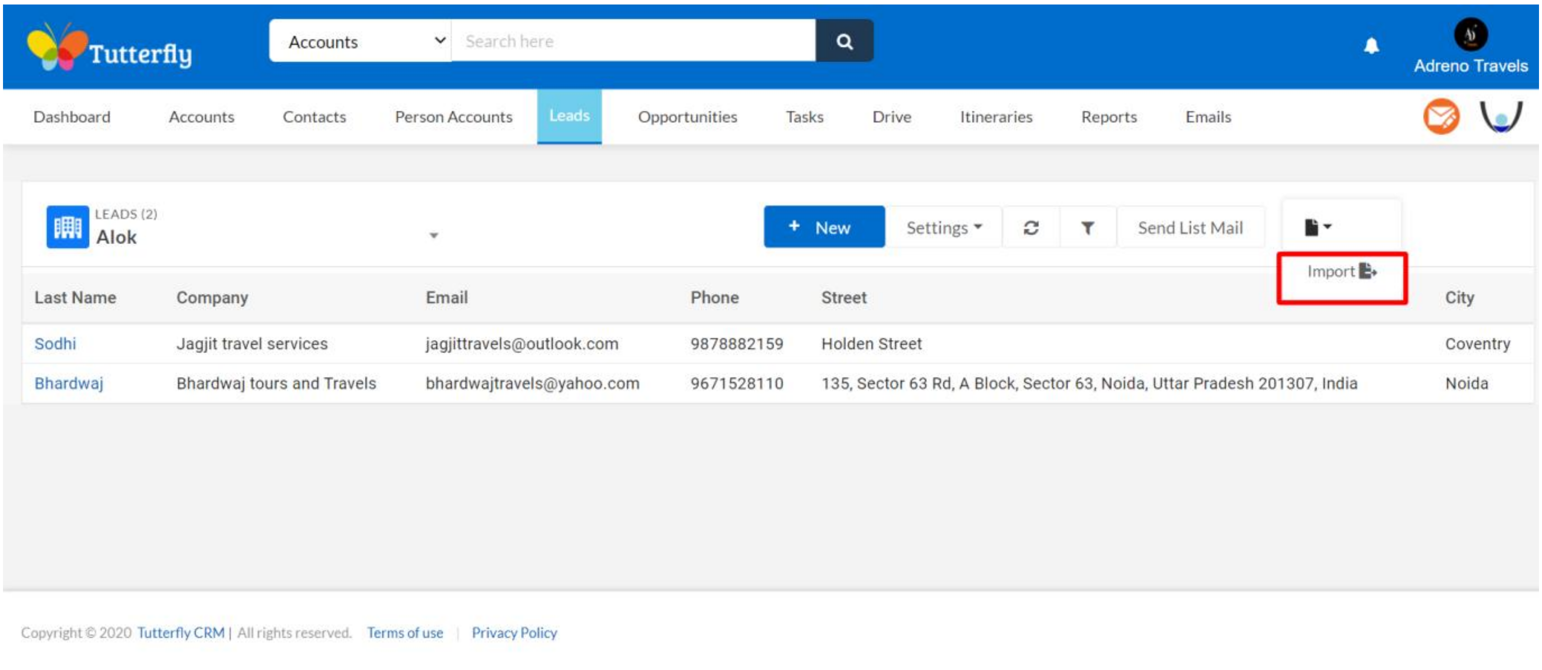


Step 4: Finally! Select a template and subject. Make changes in the email body section. Click on ‘send’ button.

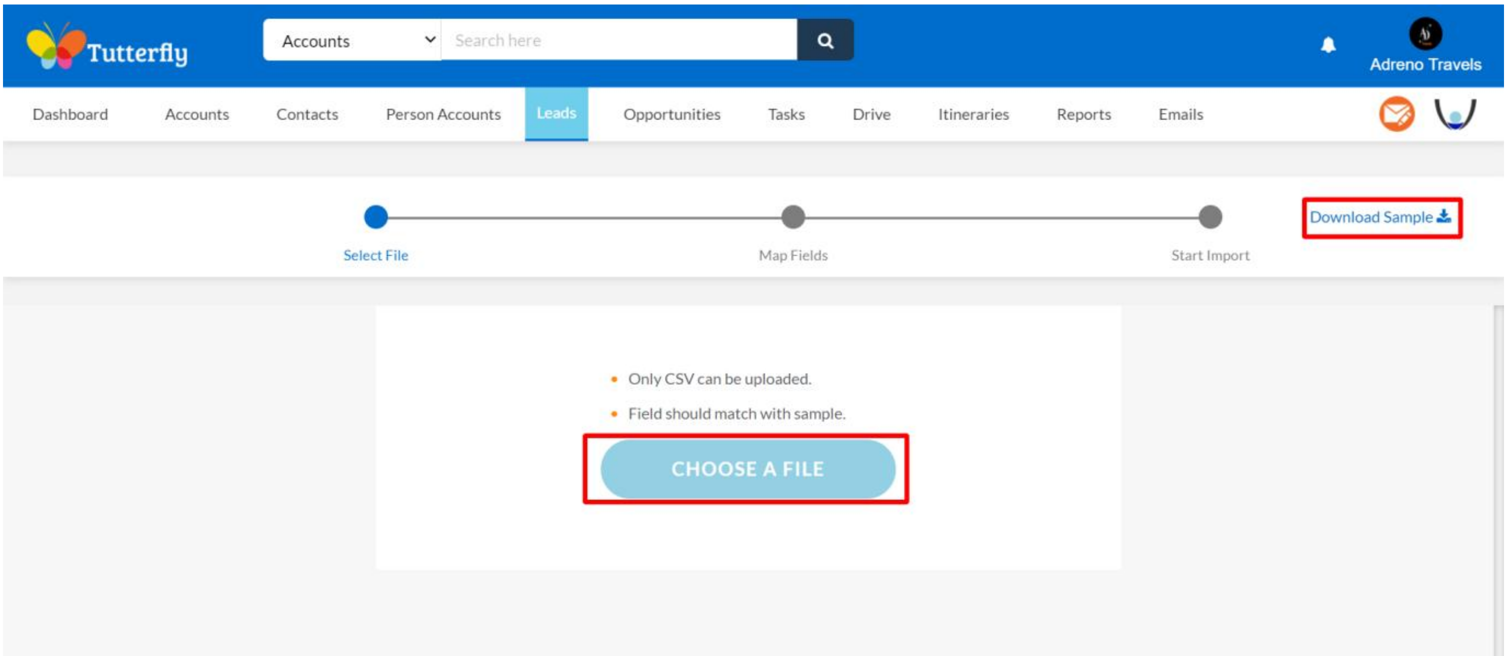


• How to import leads:

Step 1: Click on import.



Step 2: Download the same and save your data accordingly and convert the file into CSV. Click on chose file and import the excel sheet directly from your device. (Follow the procedure- Just the account module while importing your data)



Note :- Follow the same steps as Accounts and contacts modules from here to import your leads.

How to Create a New Task?

TutterflyCRM provides task management to track and manage all of your

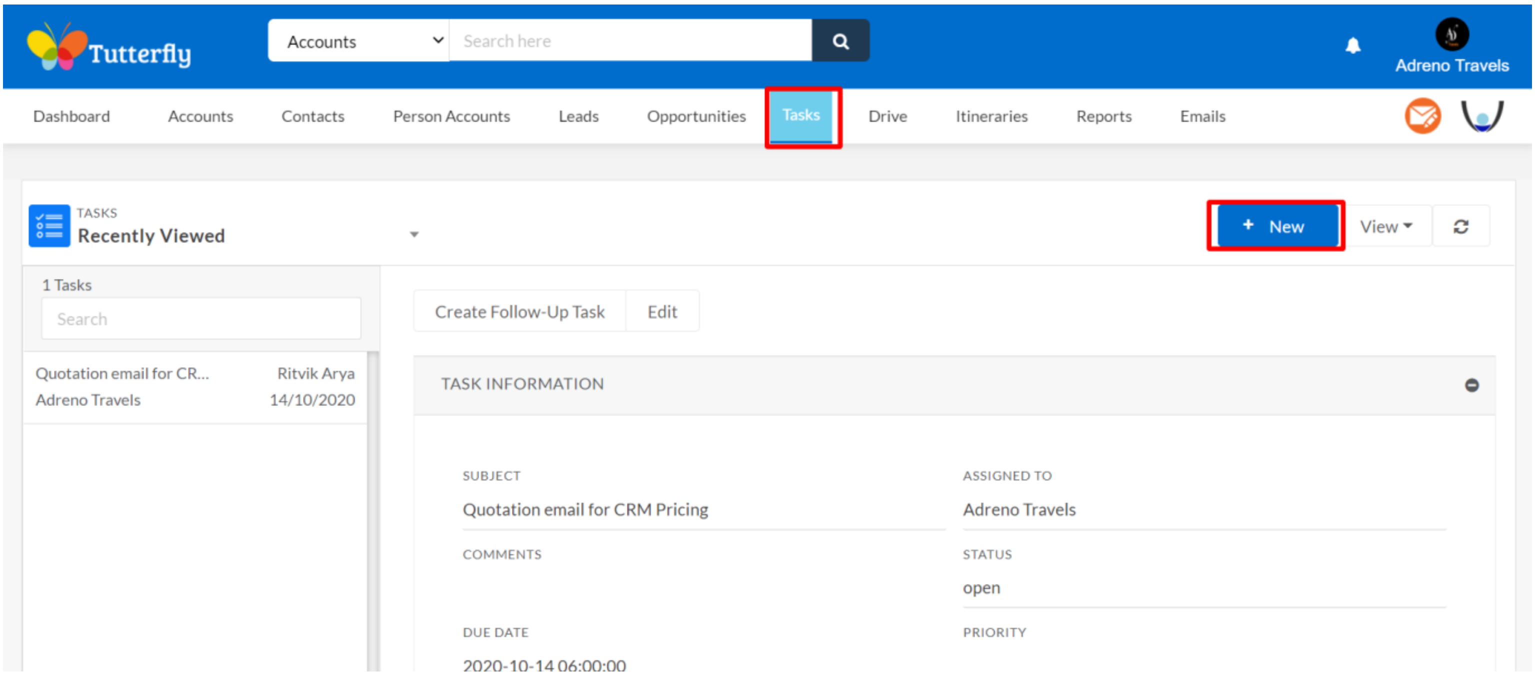
Sales tasks easily. Learn how to use them to get the best out of your CRM.

What are Tasks?

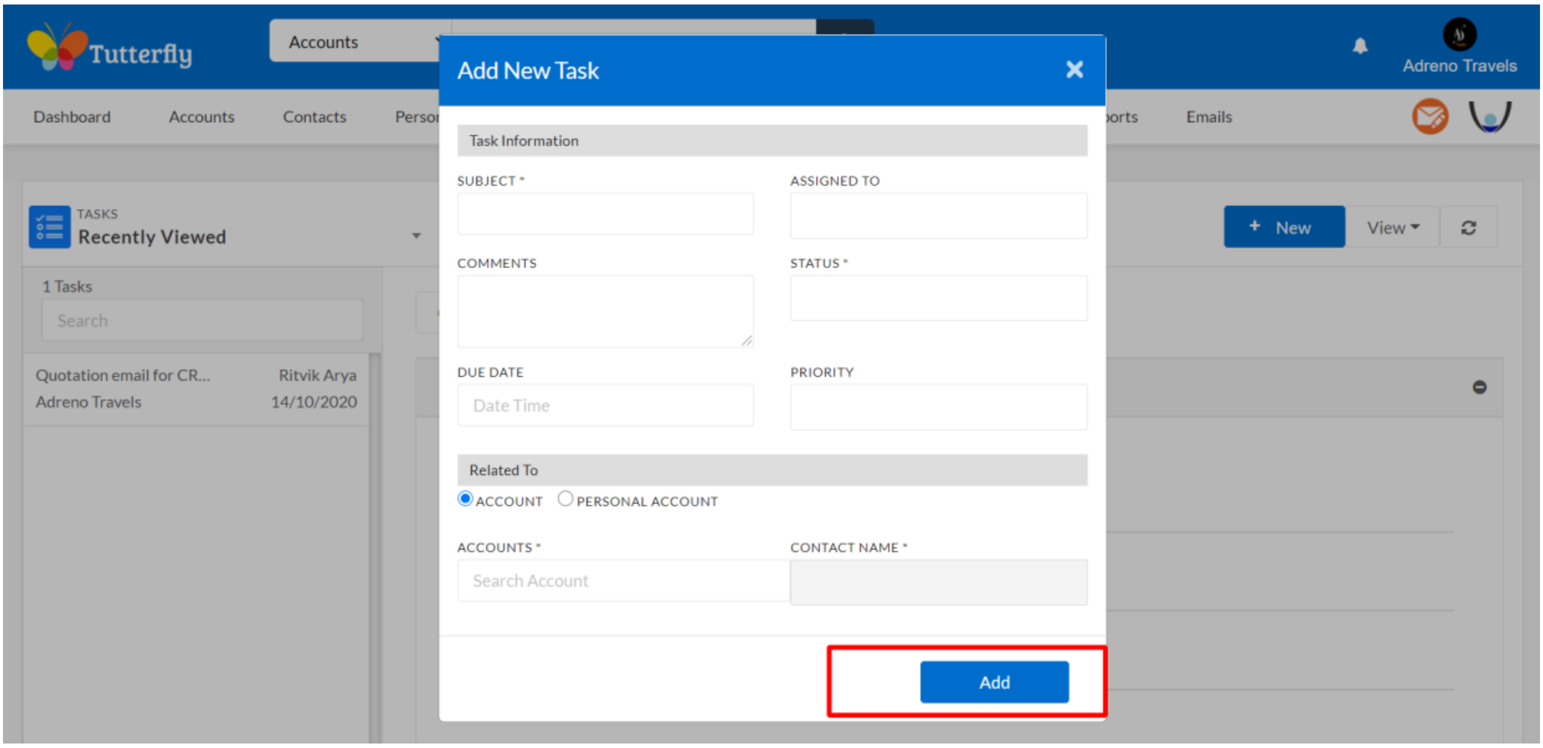
Tasks are to-do items that require completion by the user whom you have assigned the task. We can relate tasks with any of the leads, contacts or campaigns.

Create New Tasks

Step 1: Go to 'Tasks' and click on **'+New'** button.



Step 2: At last! We are almost at the end. From the **'Add New Task'** box, fill in all the fields to proceed to the next step.



Note: It is necessary to mention the **'Status'** and **'Subject'**. If related to **'Person Accounts'**, the name of the Account is a must. If related to **'Account'**, the name of the Account and contact name are essential.

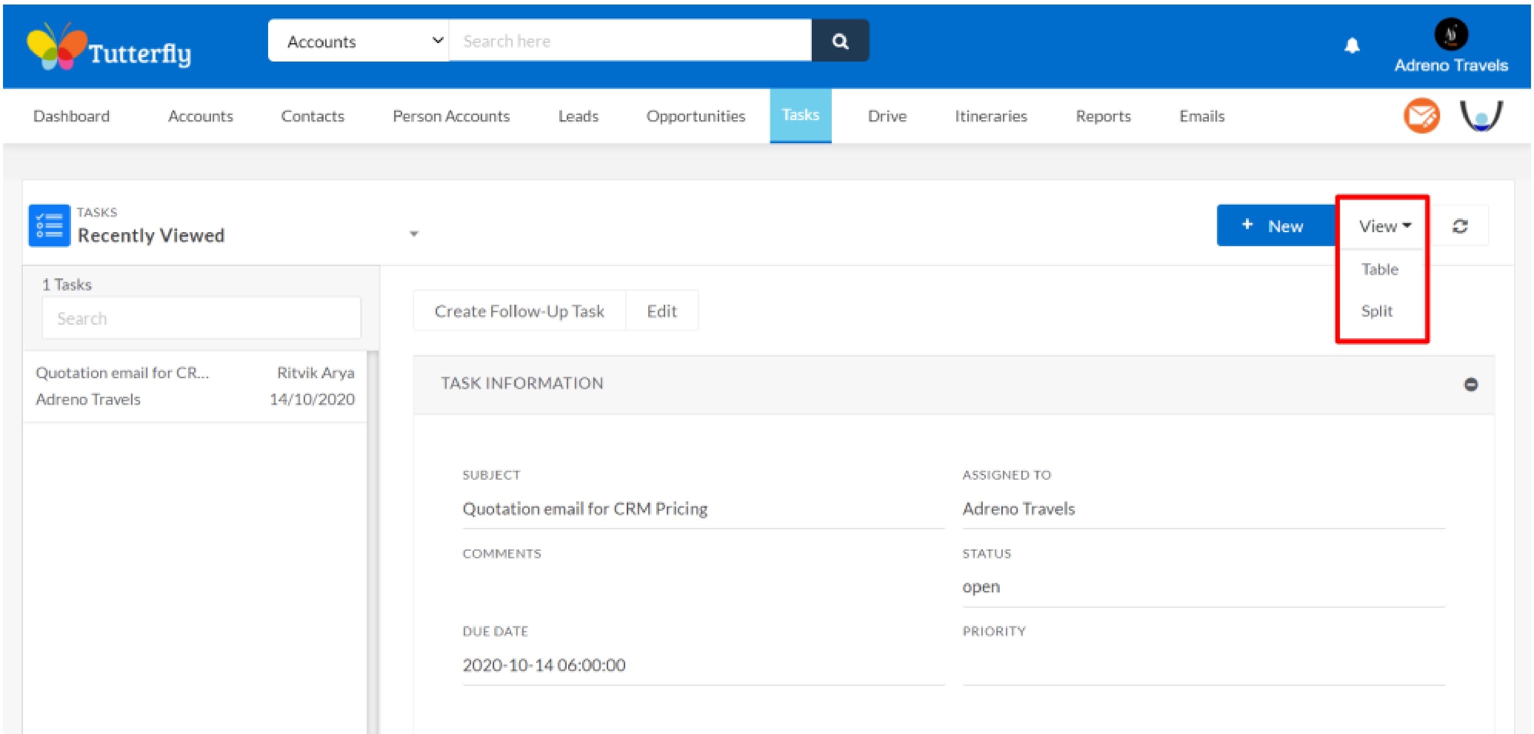
Step 3: Great! Now, click on the 'Add' button to add a new task into the system. A message box will appear indicating that the task has been created.

• Manage Views in Tasks Section

Switch to Another View

Tasks can be accessed in two formats, namely: Table and Split View. A user can switch between the two by clicking on the **'View'** dropbox.

Step 1: Go to the Tasks tab and click on the **'View'** option from the top-right corner.



Step 2: A drop-down box will appear. Select between Table and Split View to work with Tasks.

Split View:

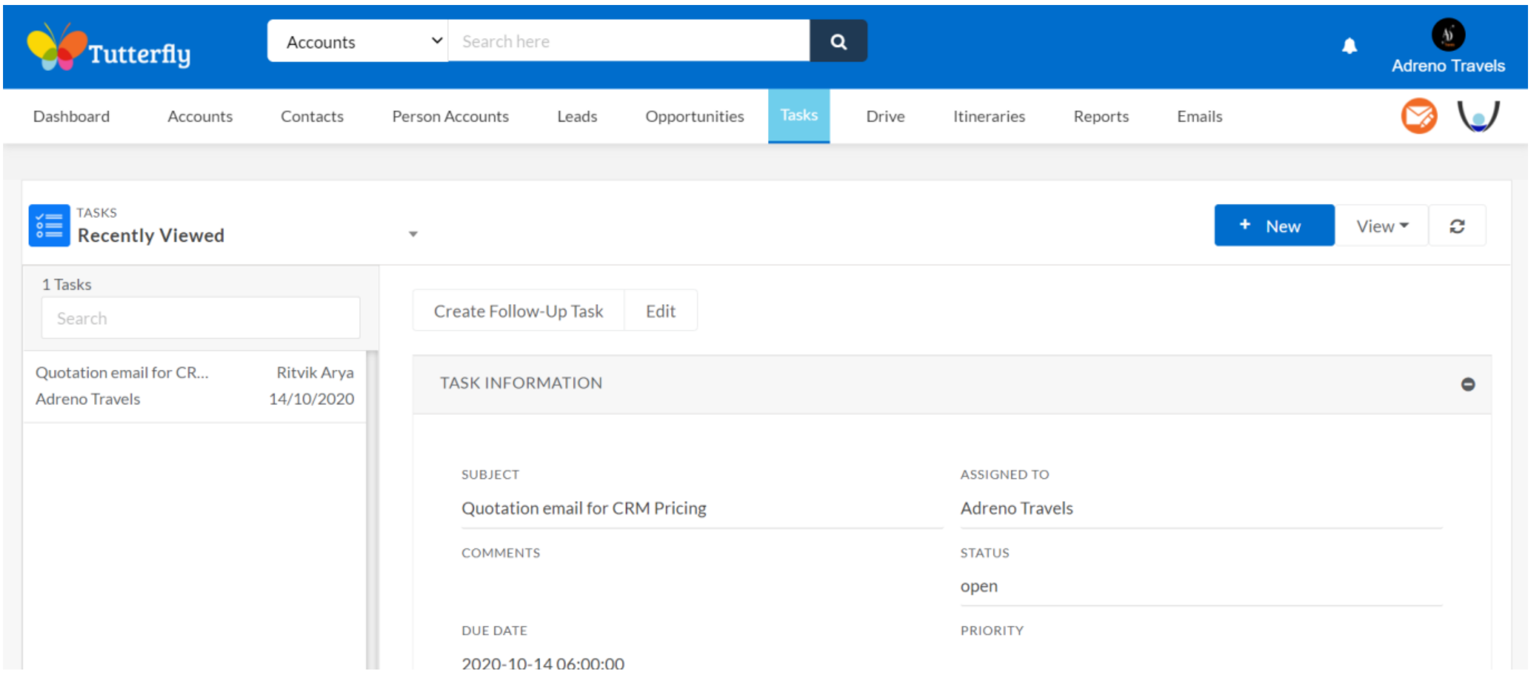
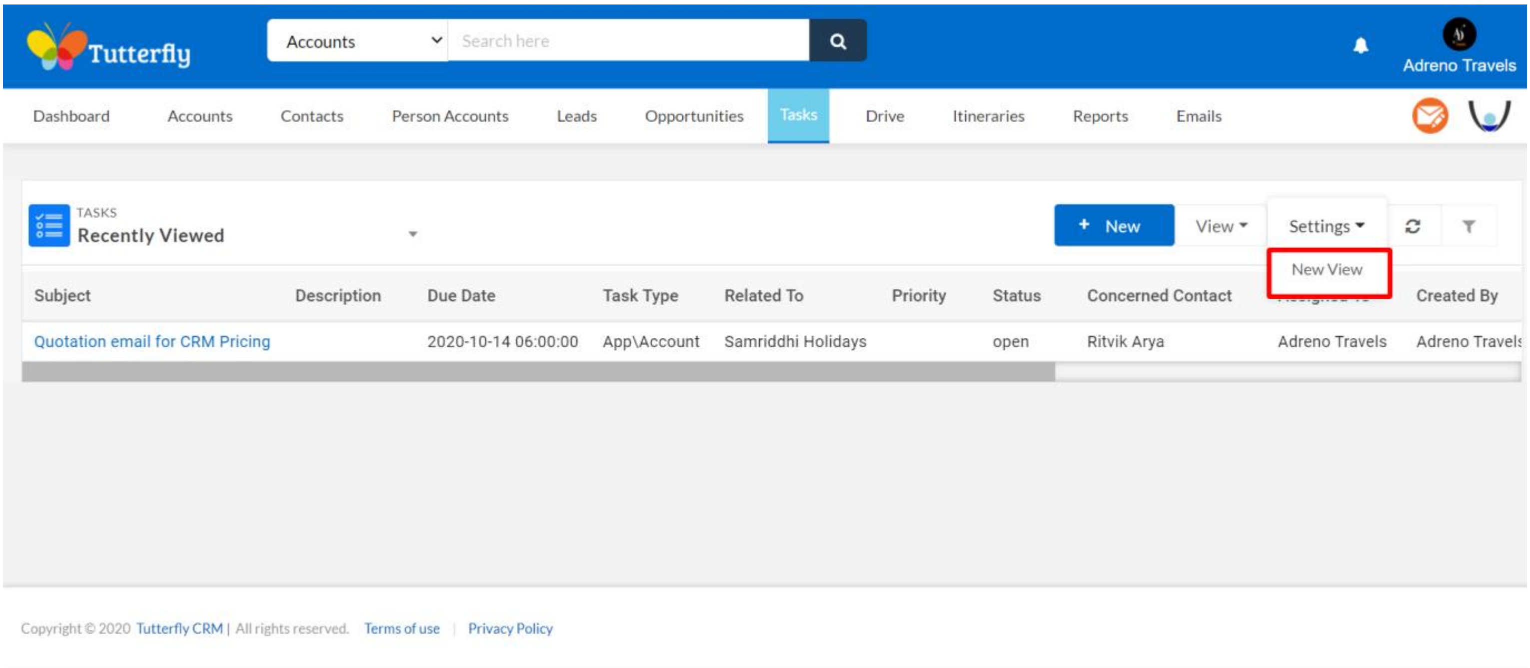


Table View:

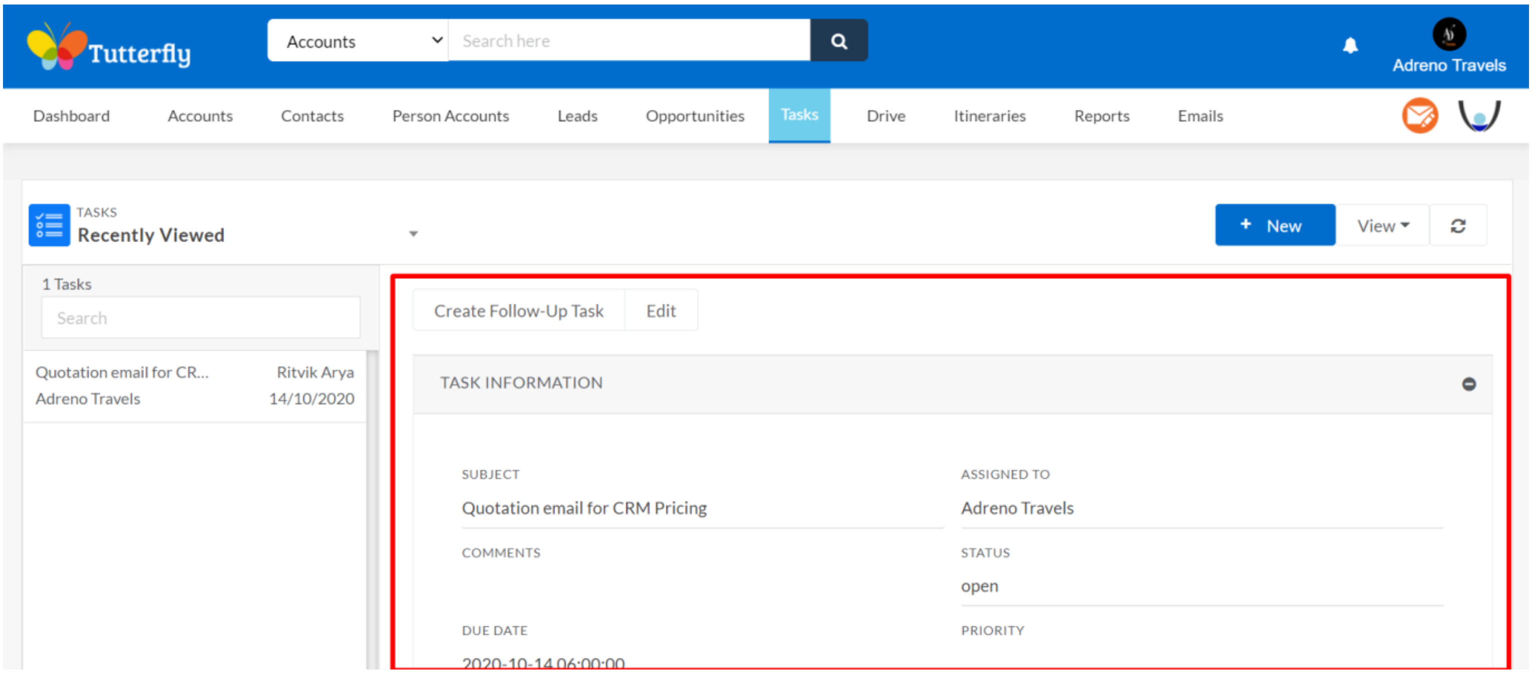


• How to Work Split View?

So, you've made it to the Split view help page! Just follow the steps below to learn all about features in split view for Tasks and how to manage them easily.

Task Information

This is the section where all the information about the Task gets mentioned. For example, 'Subject', 'Assigned To', 'Status' etc. It provides a preview of all the details associated with the Task.

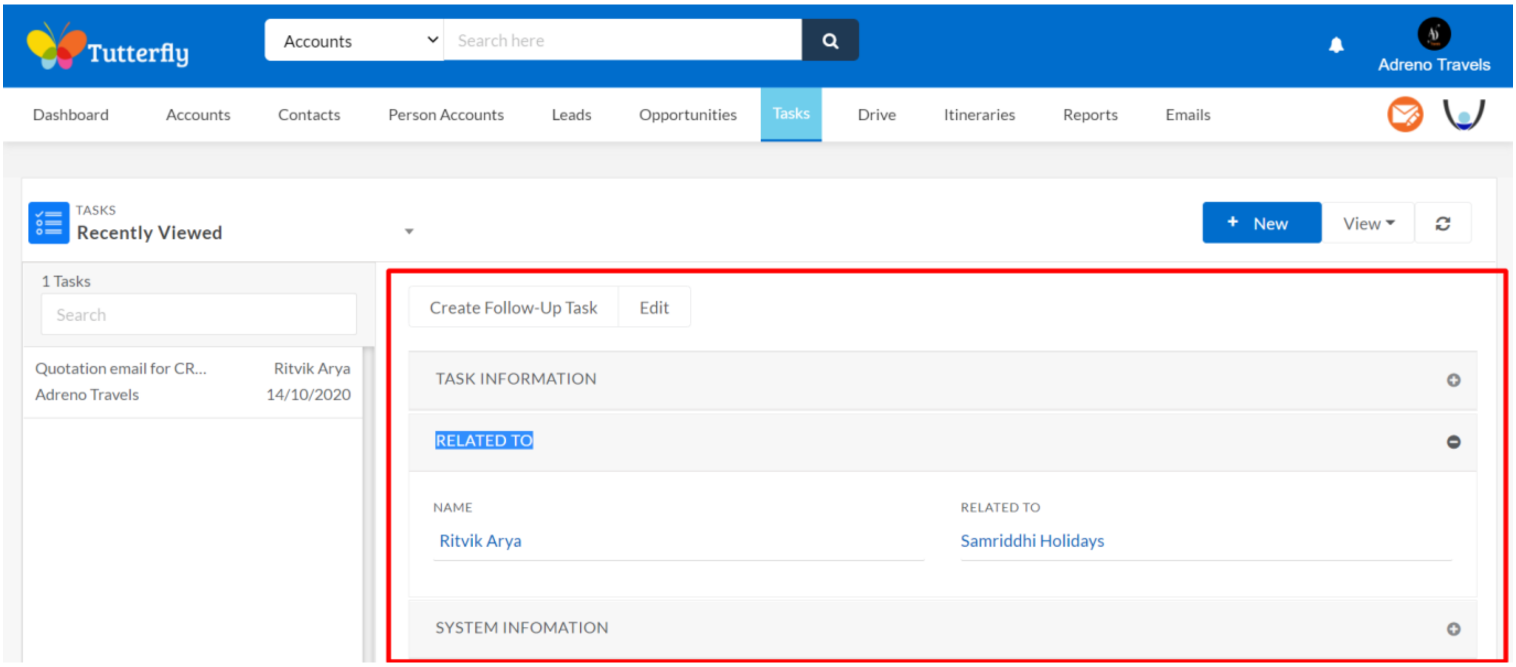


Related to

Mentions the account that is associated with the Task.

System Information

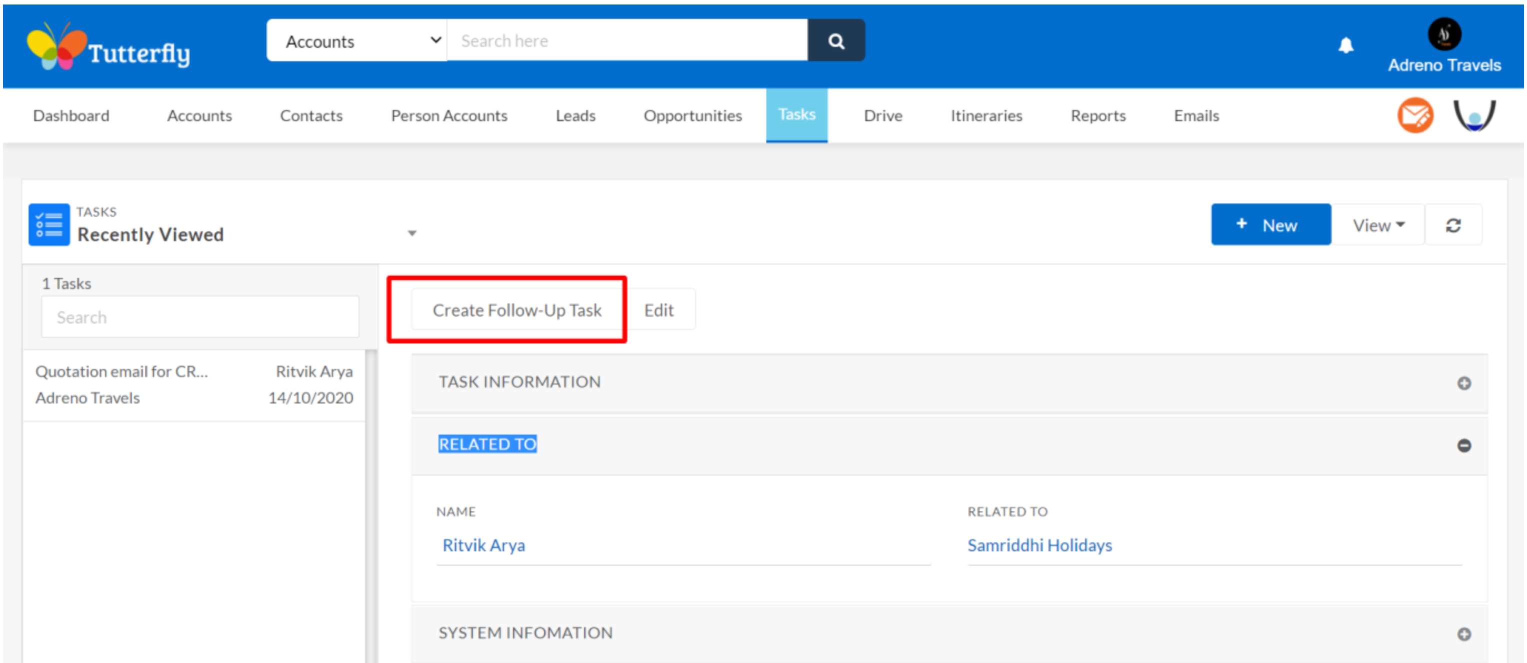
This is the final one! This displays information about the owner of the Task. It also mentions the name of the person who last edited the Task.



- **Create Follow-Up Task**

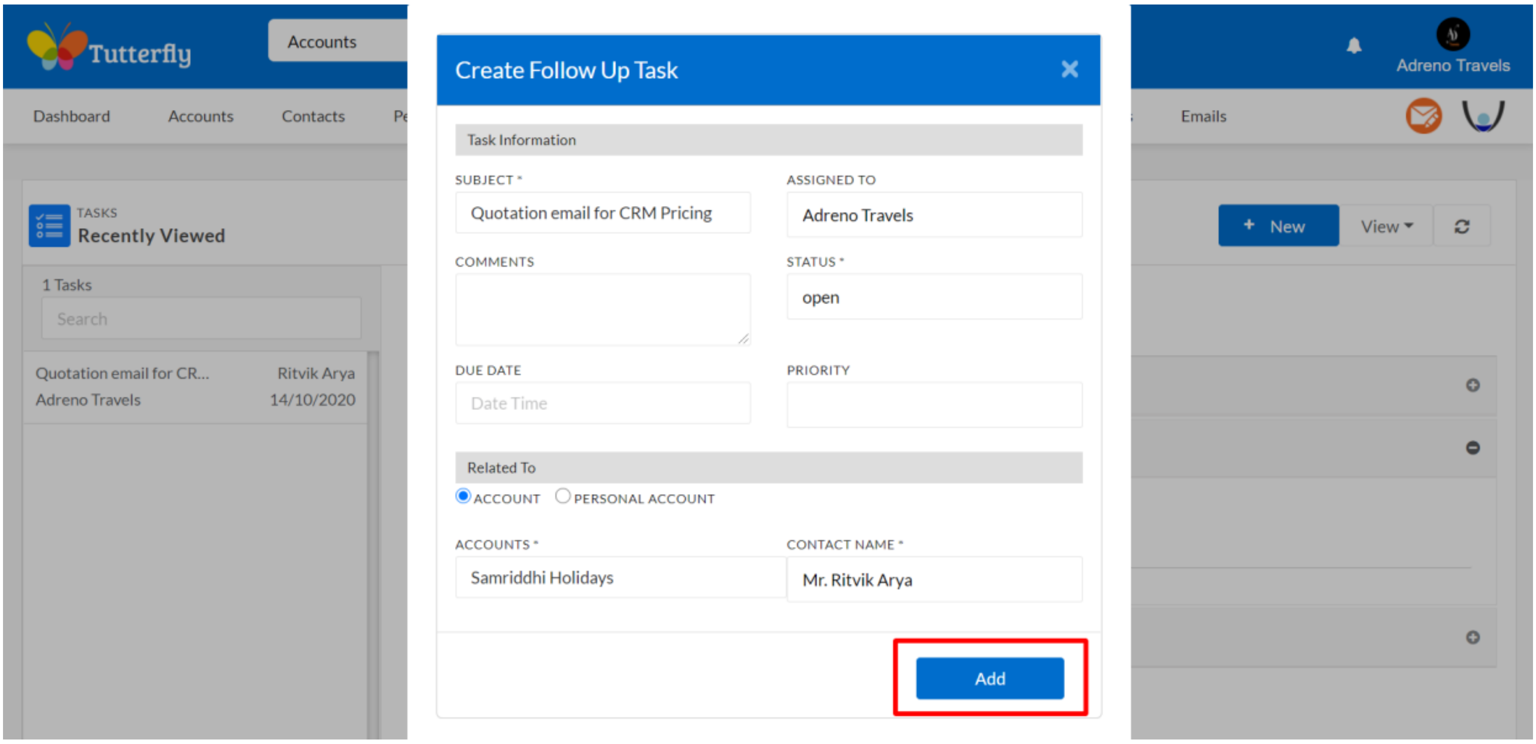
TutterflyCRM makes it easy for you to follow up on a Task. Continue reading to find out more.

• Click on the 'Create Follow-up Task'.



Hurray! We are reaching the end of the help page. Just fill in the fields to create a follow-up Task.

Note: The subject, status fields are mandatory. If related to **'Person Accounts'**, the name of the account is a must. If related to **'Account'**, the name of the account and contact name are essential.

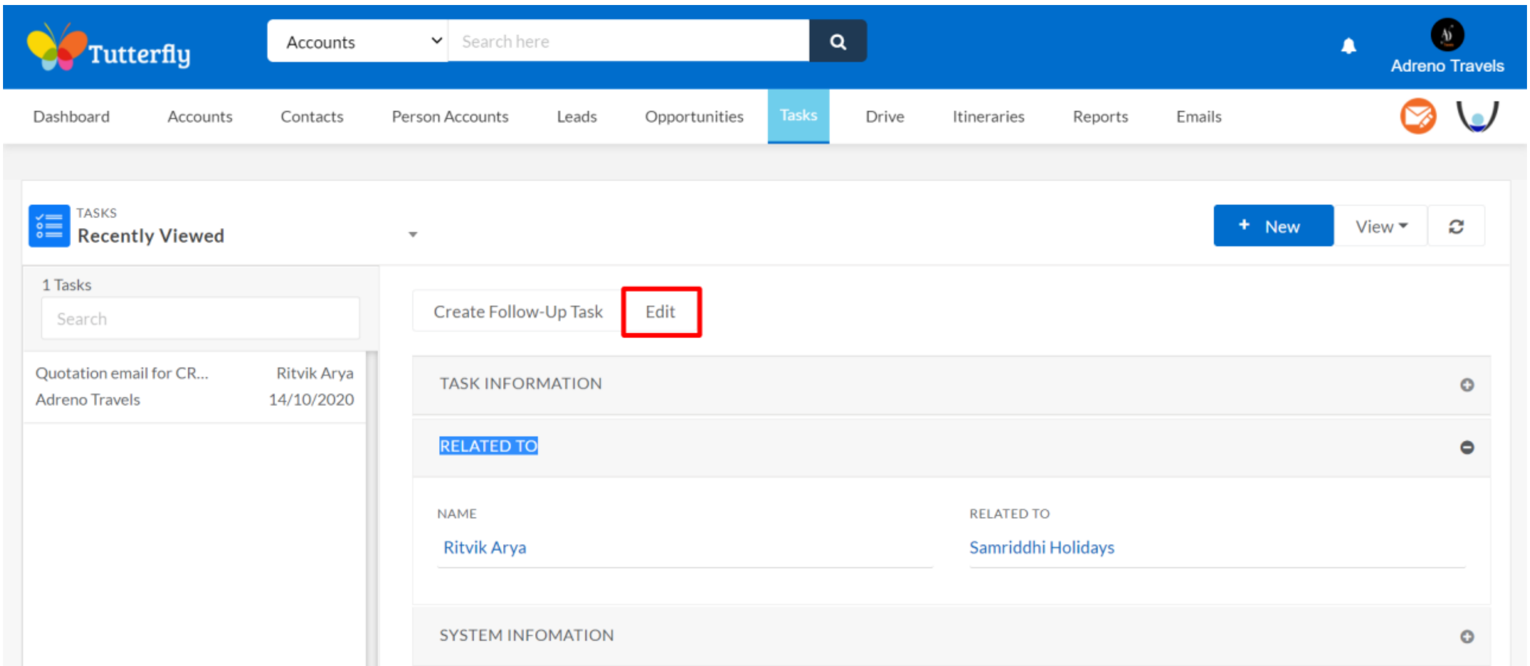


At last! A message box will appear indicating that a new Follow-up Task has been created.

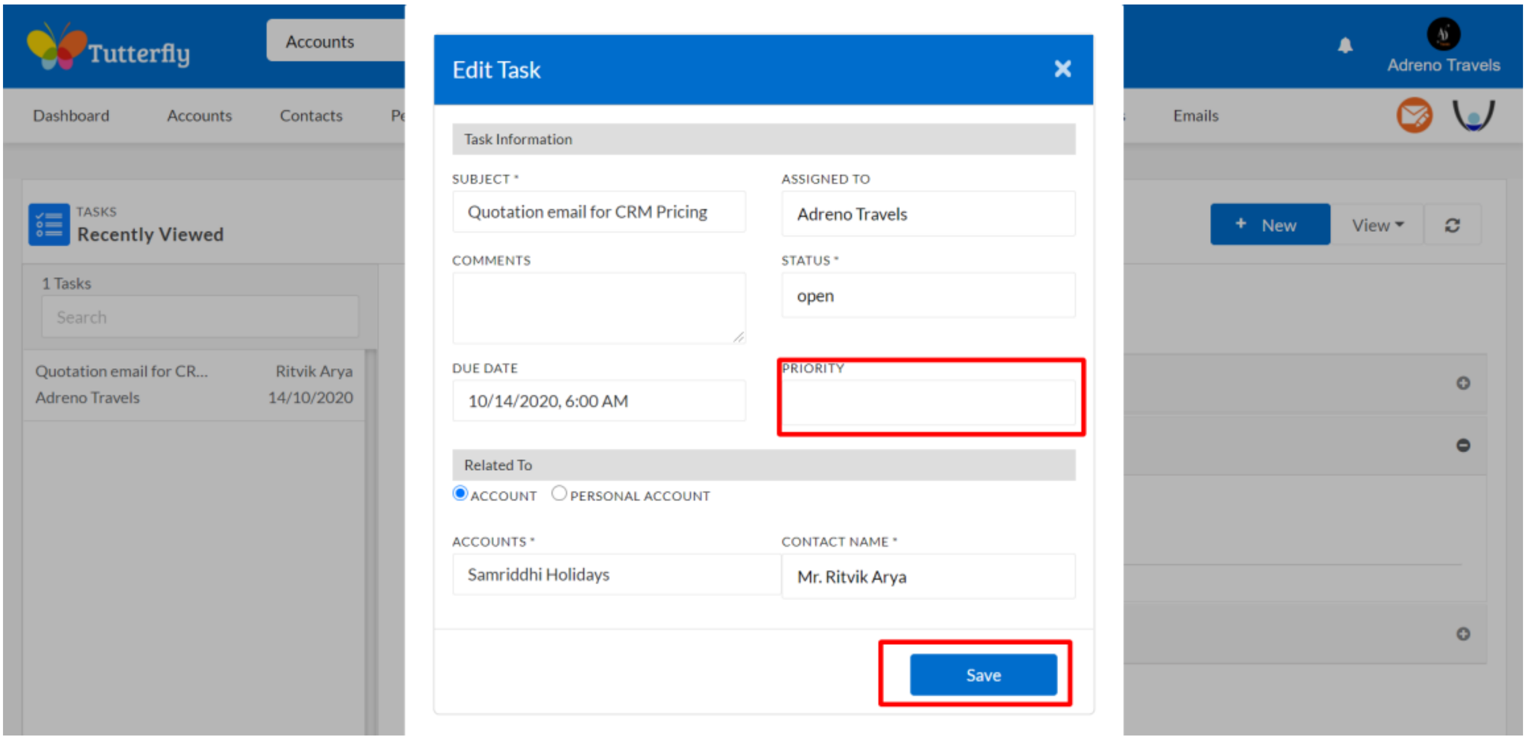
• How to Edit a Task?

This guide will help you manage priority levels. Learn to edit and manage Tasks in TutterflyCRM.

• Click on the 'Edit' button.

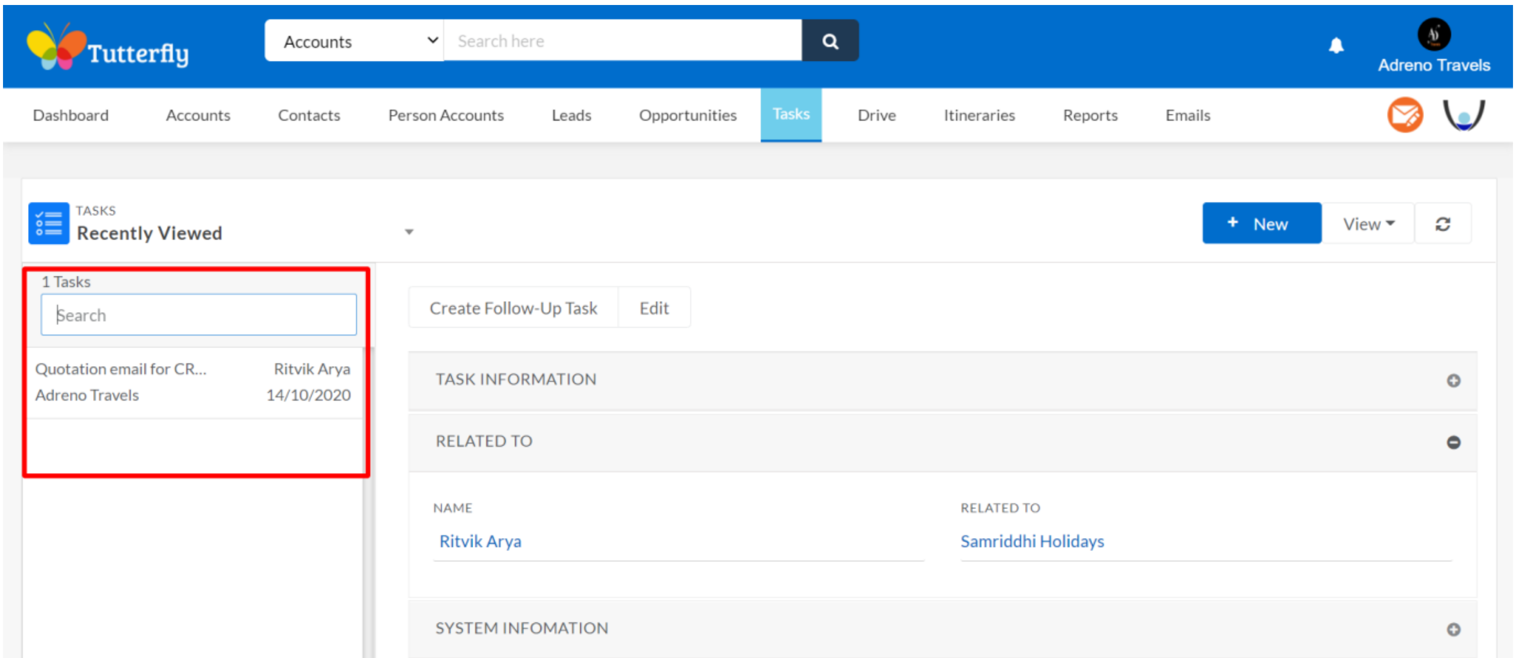


- Fill in the details to proceed to the next step.



• How to Search a Task?

To search for a particular Task from within a list of other Tasks, a user has to type a phrase or a keyword to narrow down choices for locating a task.



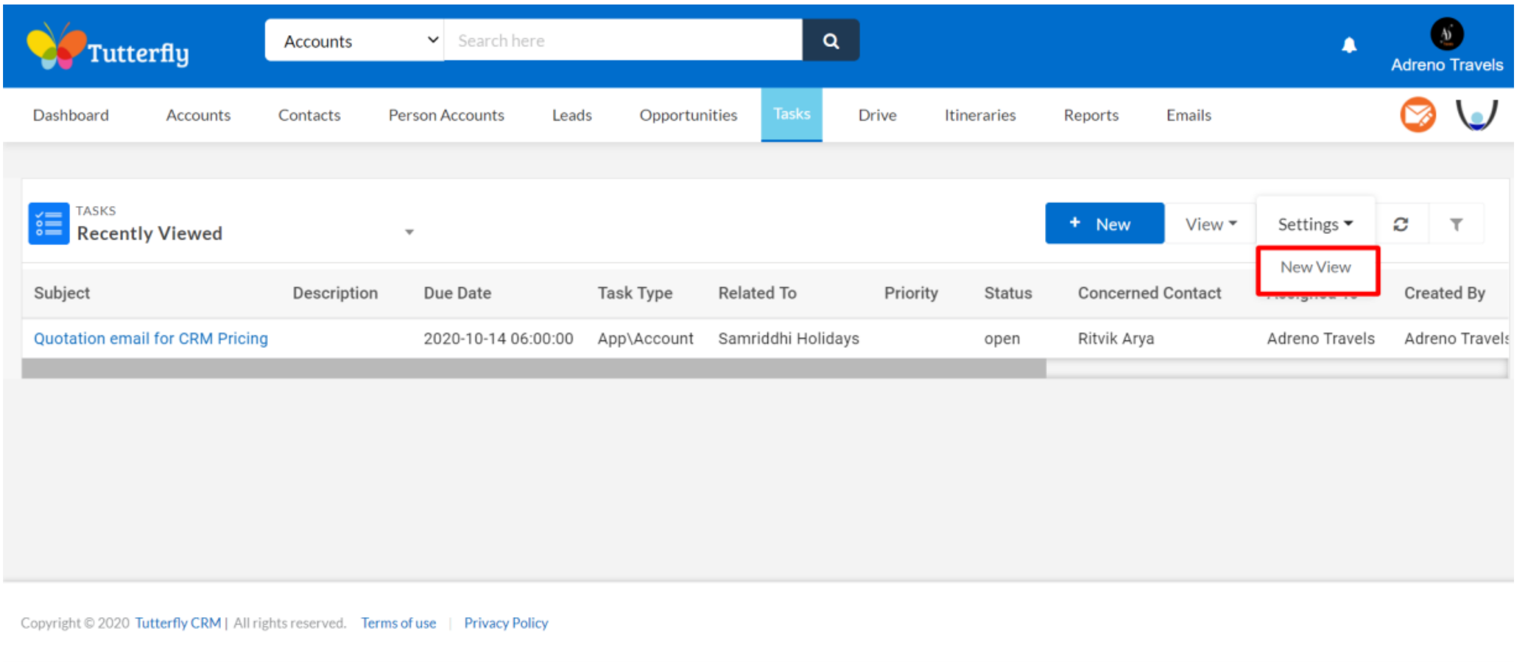
• How to Manage Views in Tasks?

Table View

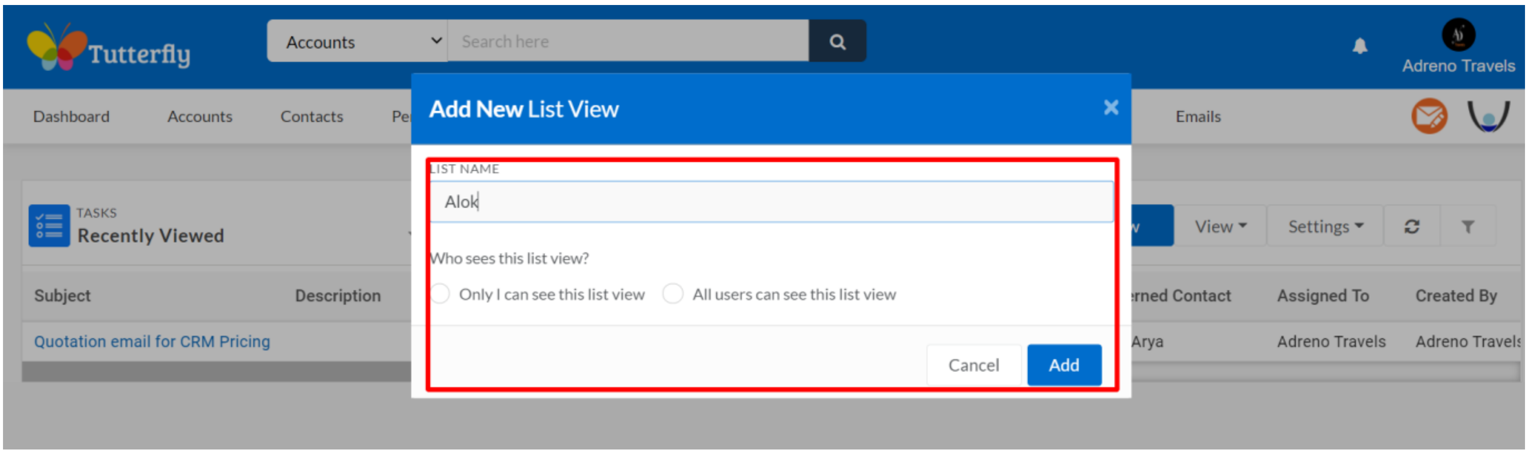
Once you have data in TutterflyCRM, you need to be able to view it! Check out these different ways to manage your data.

Create a New View in Tasks

Step 1: Click on the **Tasks >> Views >> Table>> Settings >> New**



Step 2: It will display a window that will look like the image below:

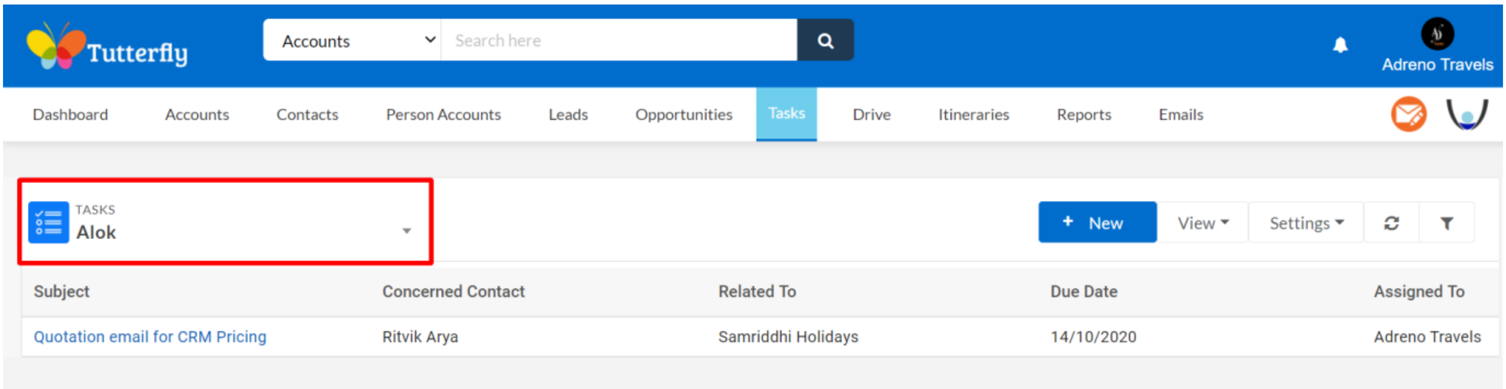


Step 3: This is the 'List-Name' and choose display settings.

Only I can see this List-View: Only the logged in user can access this View.

All users can see this List-View: All users can access this View.

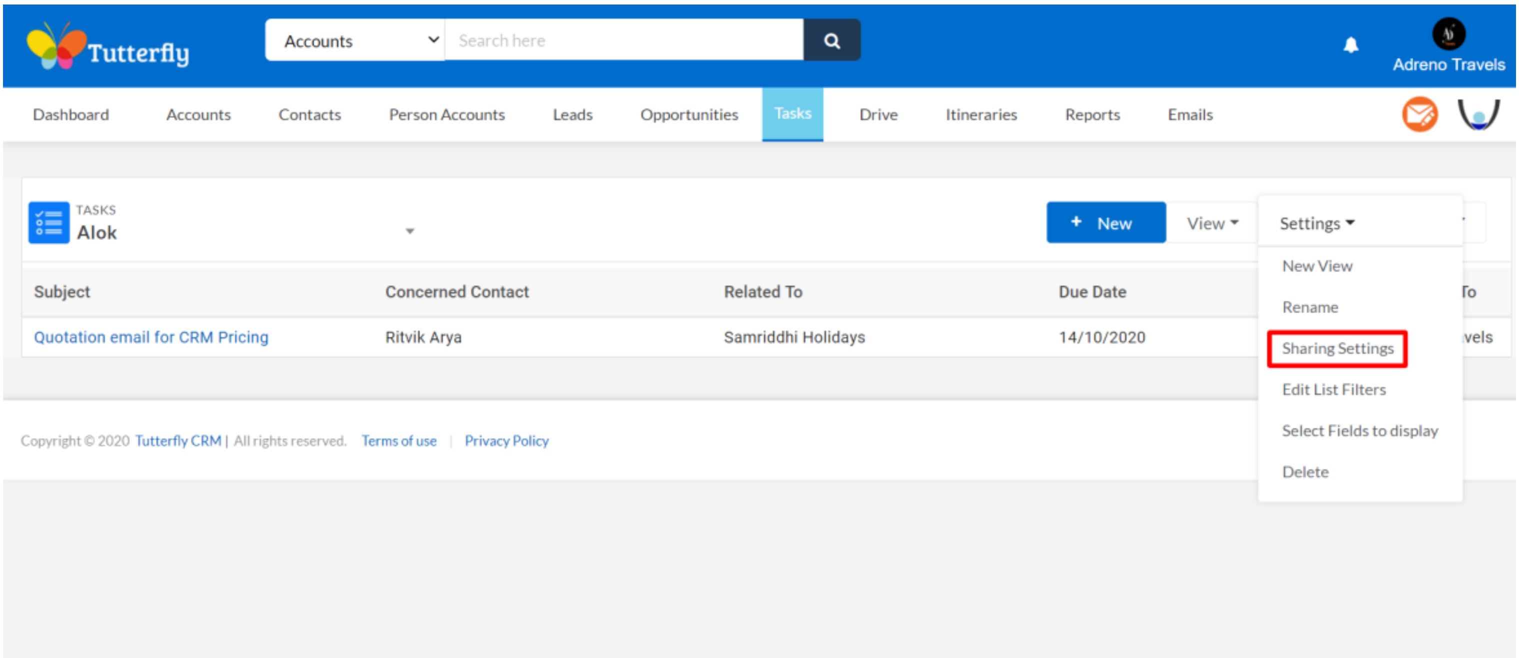
Step 4: Click on the **'Add'** button. A message box will appear indicating that a new View has been created.



• Change the Sharing Setting

In TutterflyCRM, a user can control access to some parts of the data by using share settings. Listed below are steps to limit other users from accessing important data.

Step 1: Go to **Settings >>** Sharing Settings. A box will appear like the one shown in this image below:

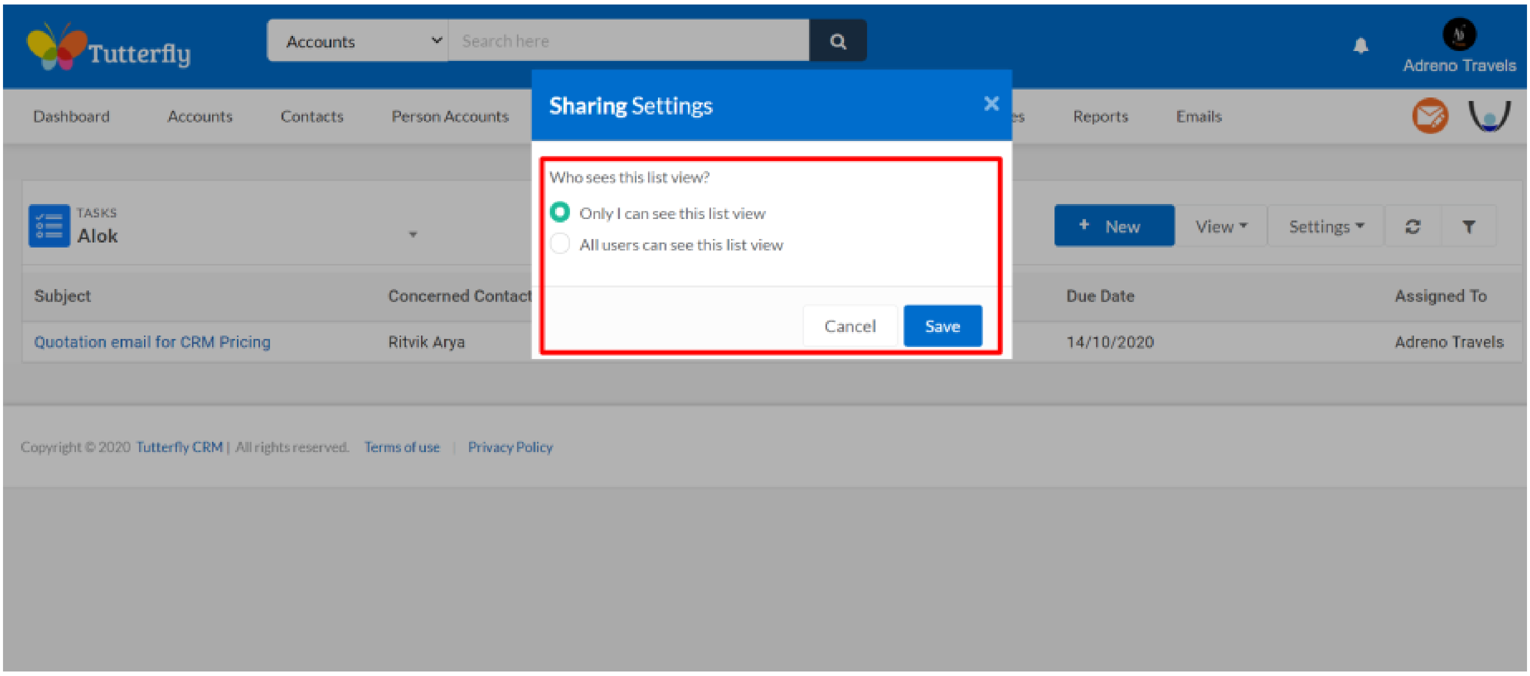


Step 2: From the **'Sharing Settings'** box, select the options to set the privacy level.

Only I can see this List-View: Only the logged in user can see this View.

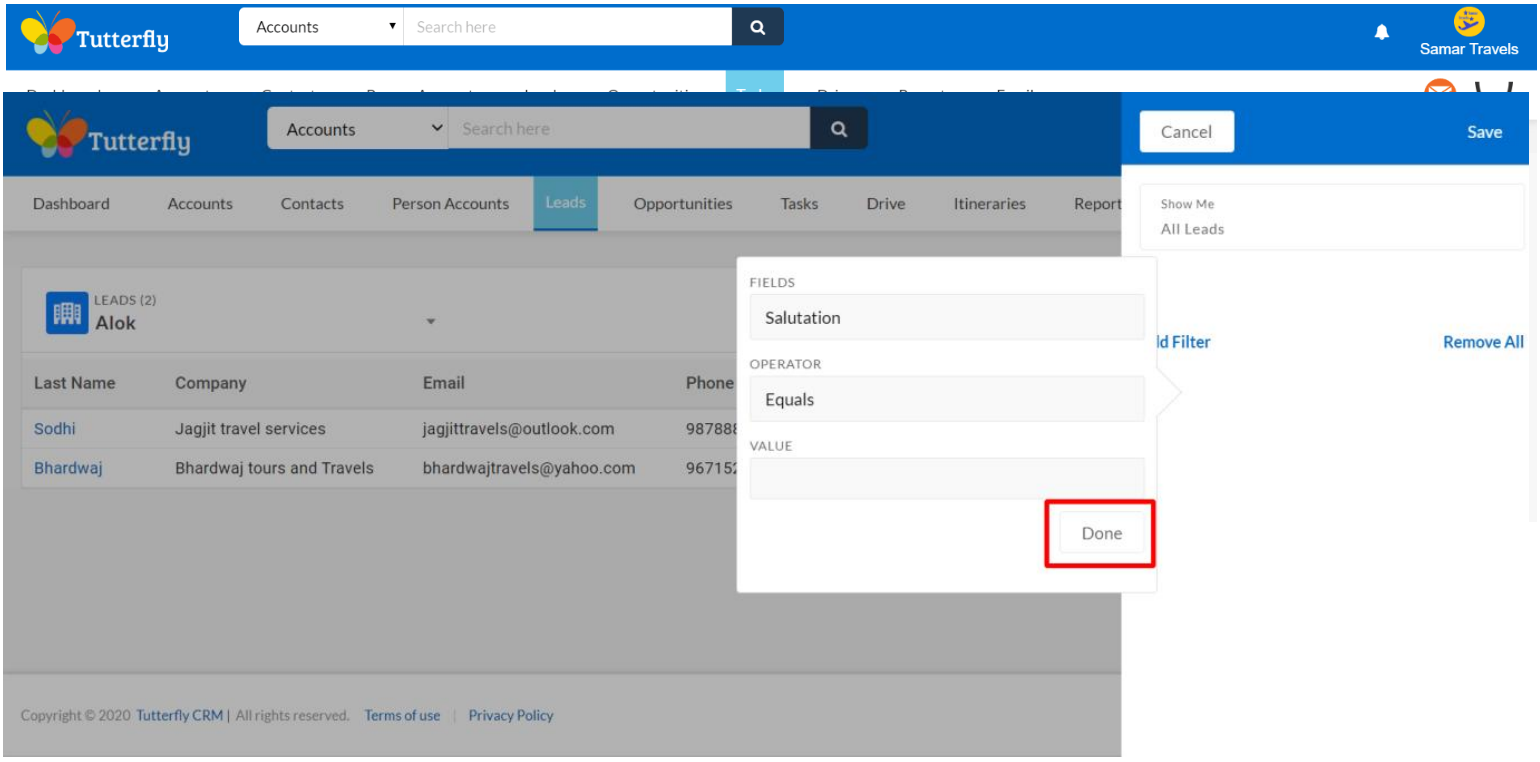
All users can see this List-View: All users can access this View.

Step 3: Then, click on the **'Save'** button.



Edit List Filters

Step 1: Go to **'Settings'** and click on **'Edit List Filters'**. A pop-up will appear in the right-hand corner. Just like the one shown in the window below.



Step 2: A pop-up will appear in the right corner. Click on the **'Add Filter'** option.

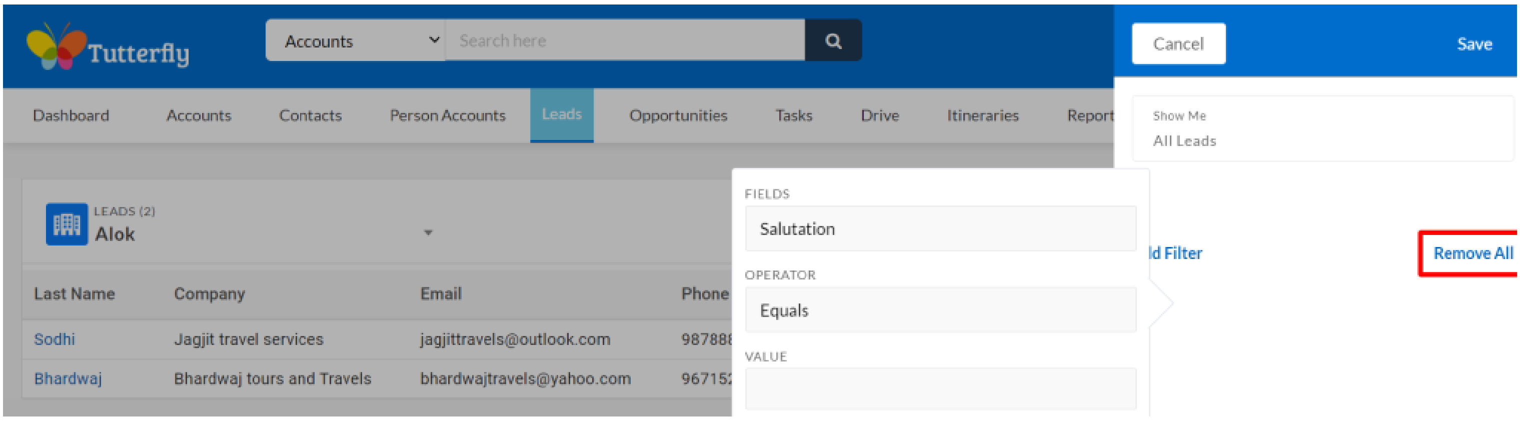
Step 3: Click on **'Add Filter'** and fill in details such as a field, operator, and value. Next, click on the 'Done' button.

Step 4: Click on the Save button.

Note: This filter can also be applied using the filter icon on the main 'Leads' page.

Remove an Existing Filter

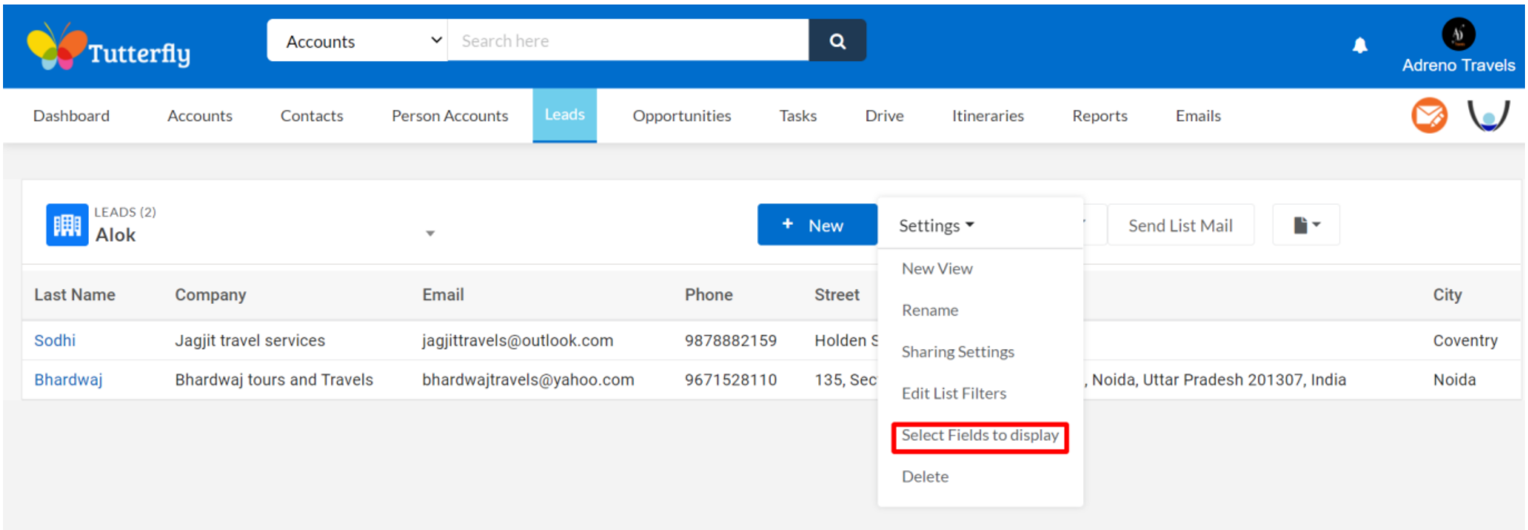
Step 1: There is another option to clear an existing filter by clicking on the **'Remove All'** link in the far right corner.



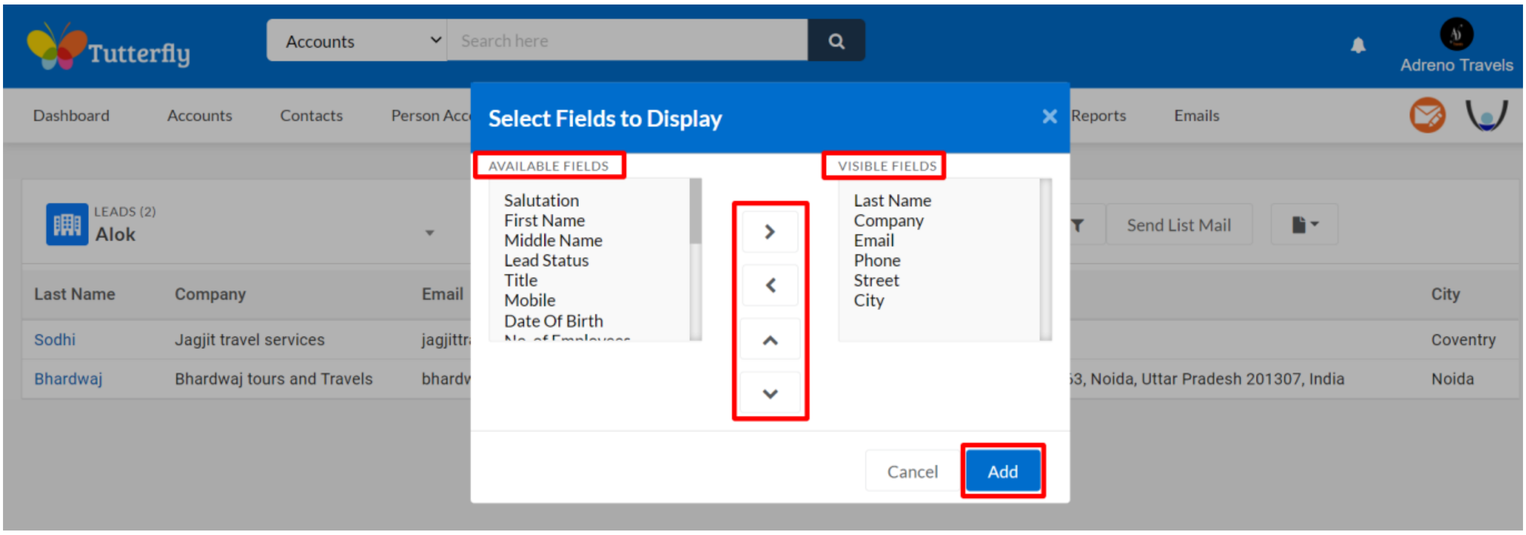
Step 2: Click on **'Save'**, to save the changes made.

Select Fields to Display

Step 1: Click on **Settings >>** Select Fields to Display.



Step 2: From the **'Select Field to Display'** box, choose **'Available fields'** to add a new **'Visible Fields'**.



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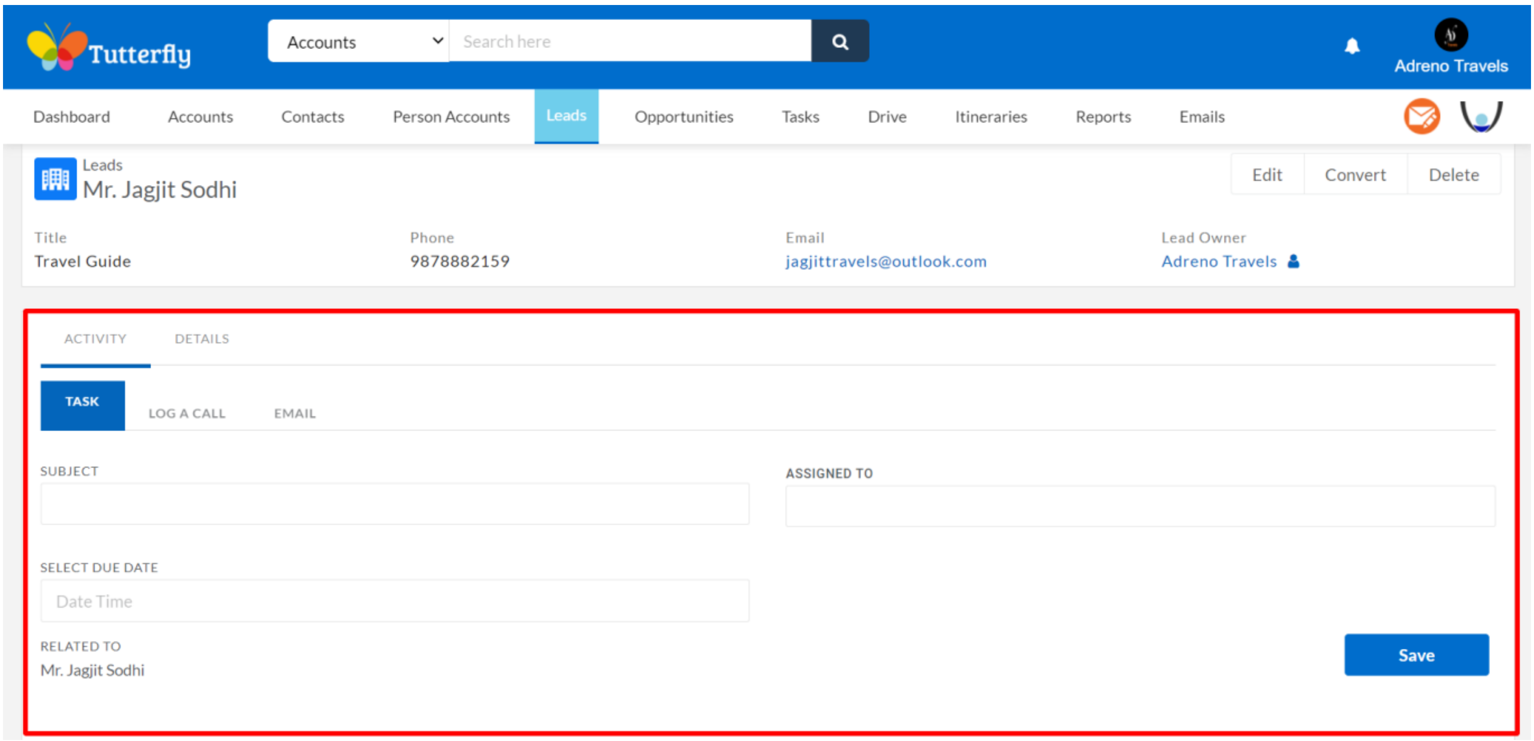

After filling out information just simply click on Save and the message box will appear confirming that a task has been created.

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A user can enter telephonic conversations in text format using TutterfyCRM. We can use it to review information for the future.

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Users can communicate and collaborate through emails in TutterflyCRM. While creating emails, a user can also select different templates created by the admin.

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This is the final one! This displays all the logs made through email communication.

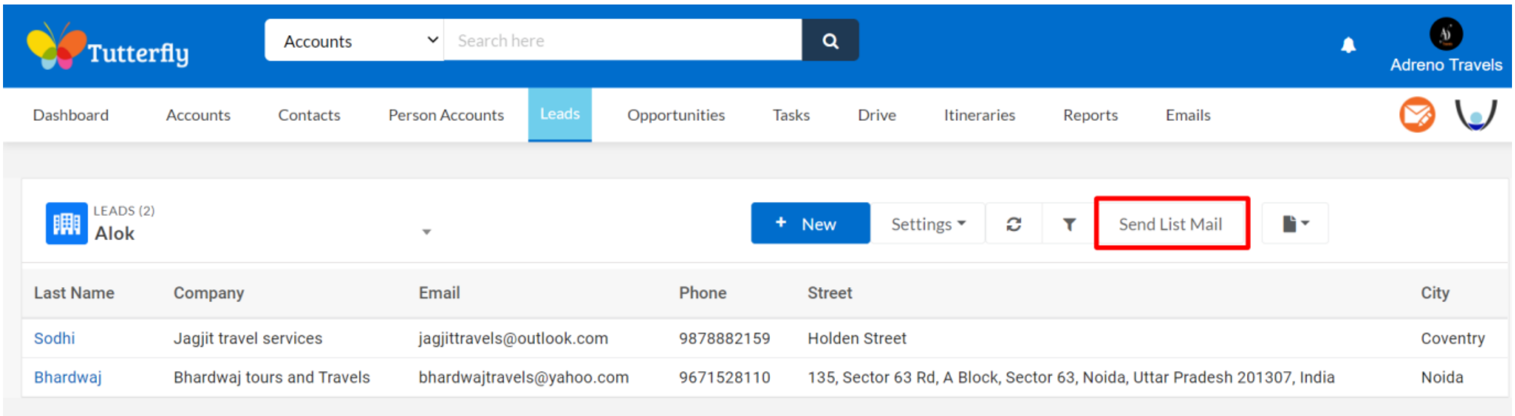
• Send Bulk Emails in 'Leads' Section

Send a common message to all your contacts quickly by following the steps below:

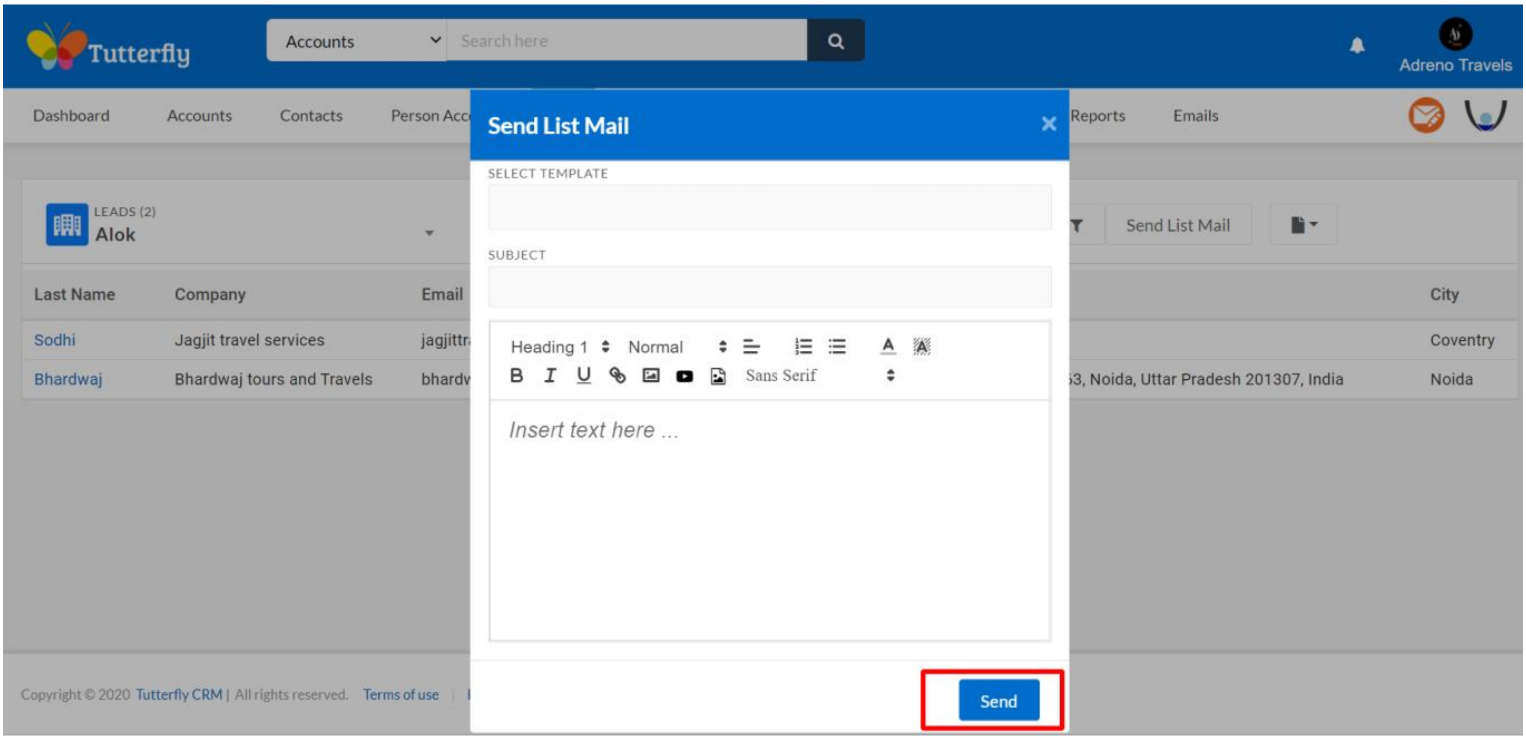
Step 1: Go to TutterflyCRM and click on the **'Leads'** tab.

Step 2: Switch to any view other than the default one. The list of emails can be sent through any view other than the default.

We are almost at the end. Click on the **'Send List Mail'** option.

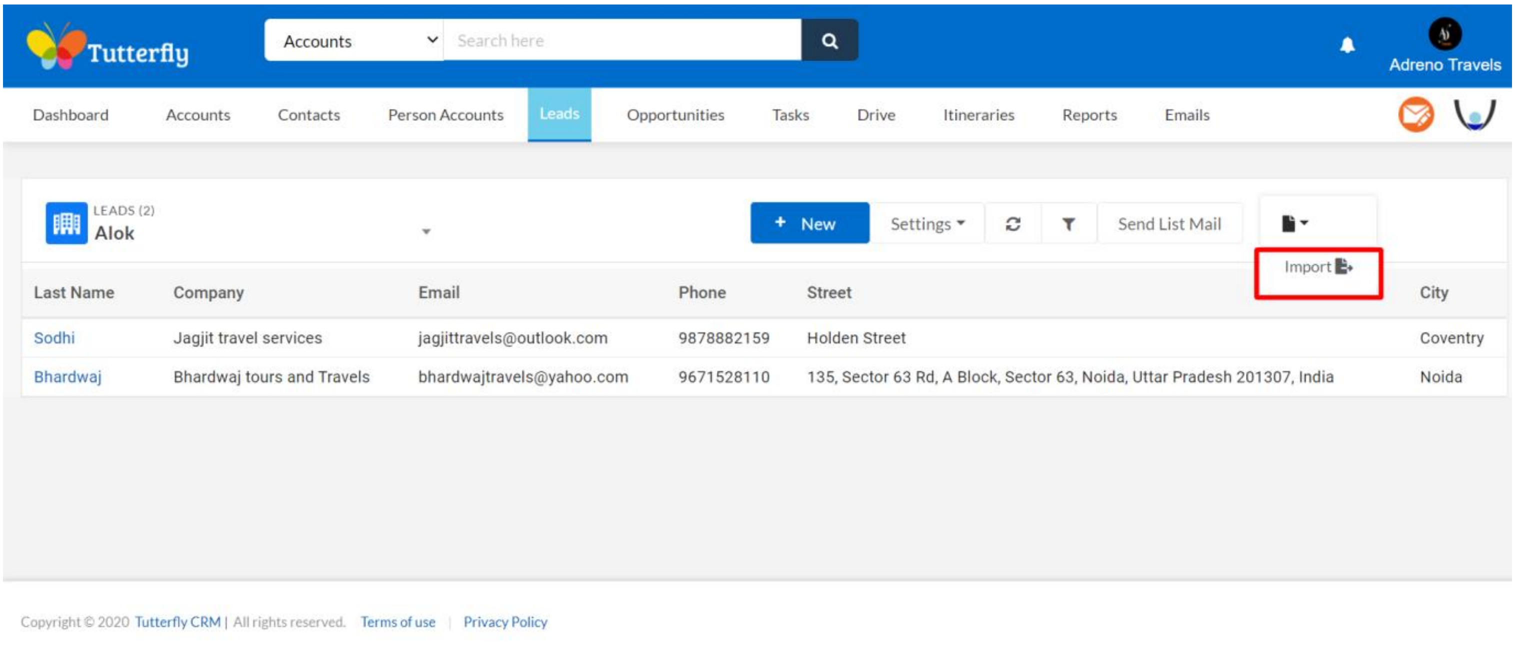


Step 4: Finally! Select a template and subject. Make changes in the email body section. Click on **'send'** button.

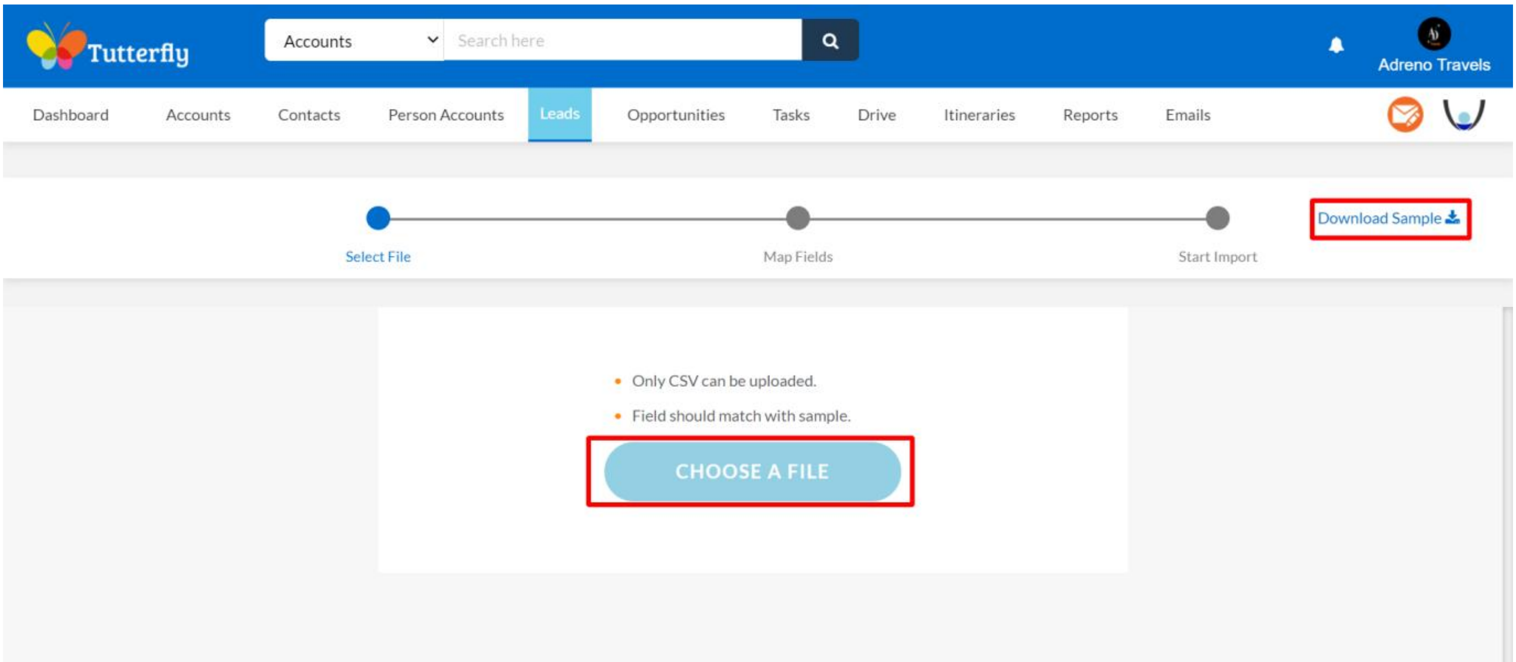


• How to import leads:

Step 1: Click on import.



Step 2: Download the same and save your data accordingly and convert the file into CSV. Click on chose file and import the excel sheet directly from your device. (Follow the procedure- Just the account module while importing your data)



Note :- Follow the same steps as Accounts and contacts modules from here to import your leads.

How to Create a New Task?

TutterflyCRM provides task management to track and manage all of your

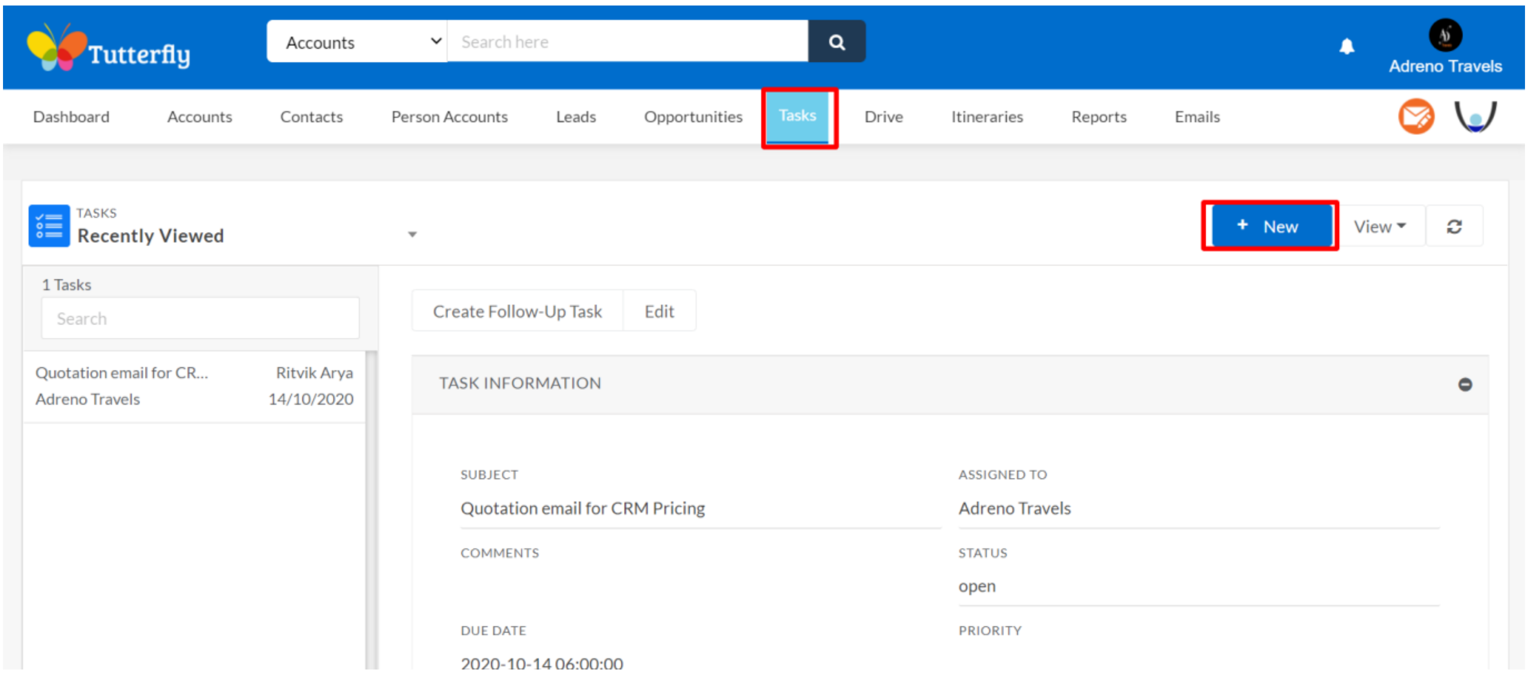
Sales tasks easily. Learn how to use them to get the best out of your CRM.

What are Tasks?

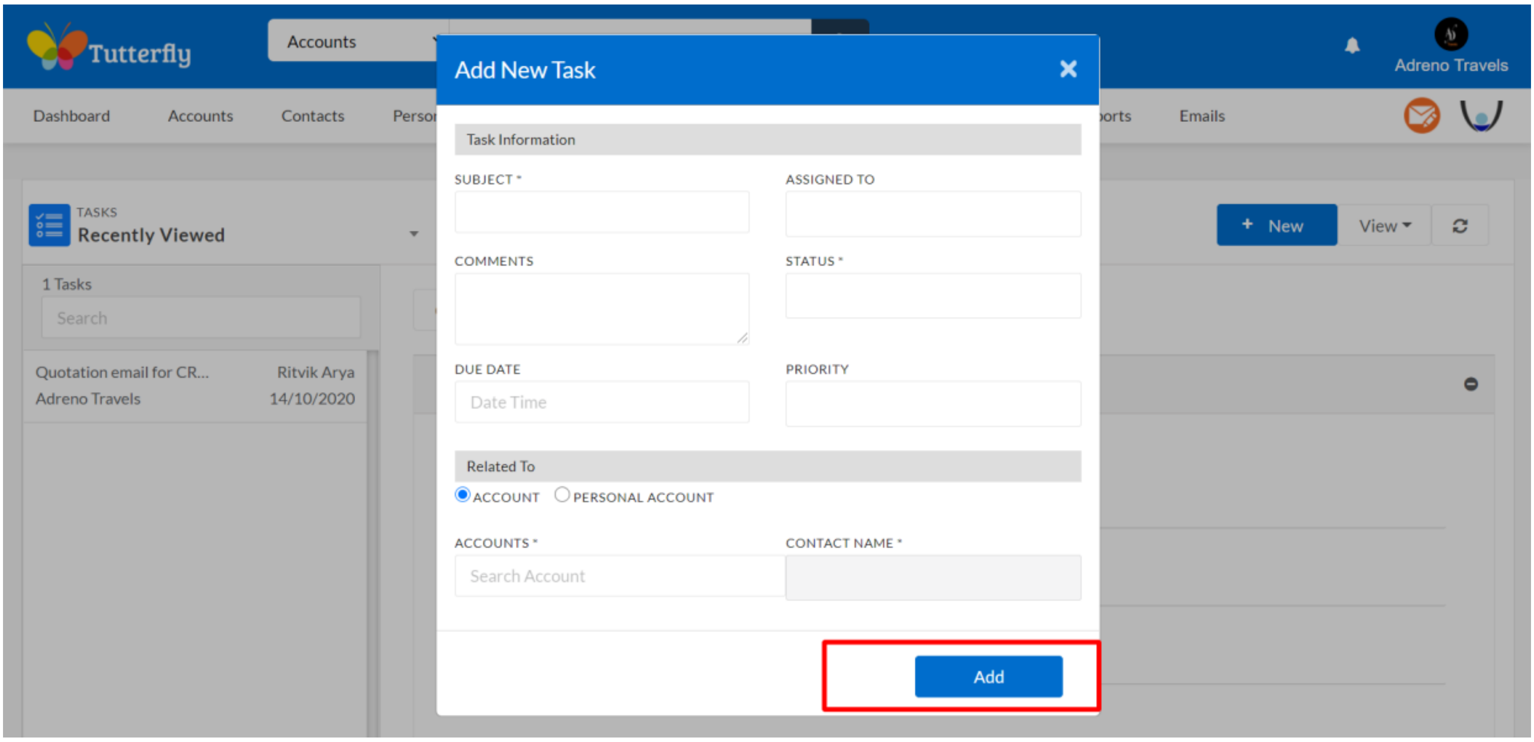
Tasks are to-do items that require completion by the user whom you have assigned the task. We can relate tasks with any of the leads, contacts or campaigns.

Create New Tasks

Step 1: Go to 'Tasks' and click on **'+New'** button.



Step 2: At last! We are almost at the end. From the **'Add New Task'** box, fill in all the fields to proceed to the next step.



Note: It is necessary to mention the **'Status'** and **'Subject'**. If related to **'Person Accounts'**, the name of the Account is a must. If related to **'Account'**, the name of the Account and contact name are essential.

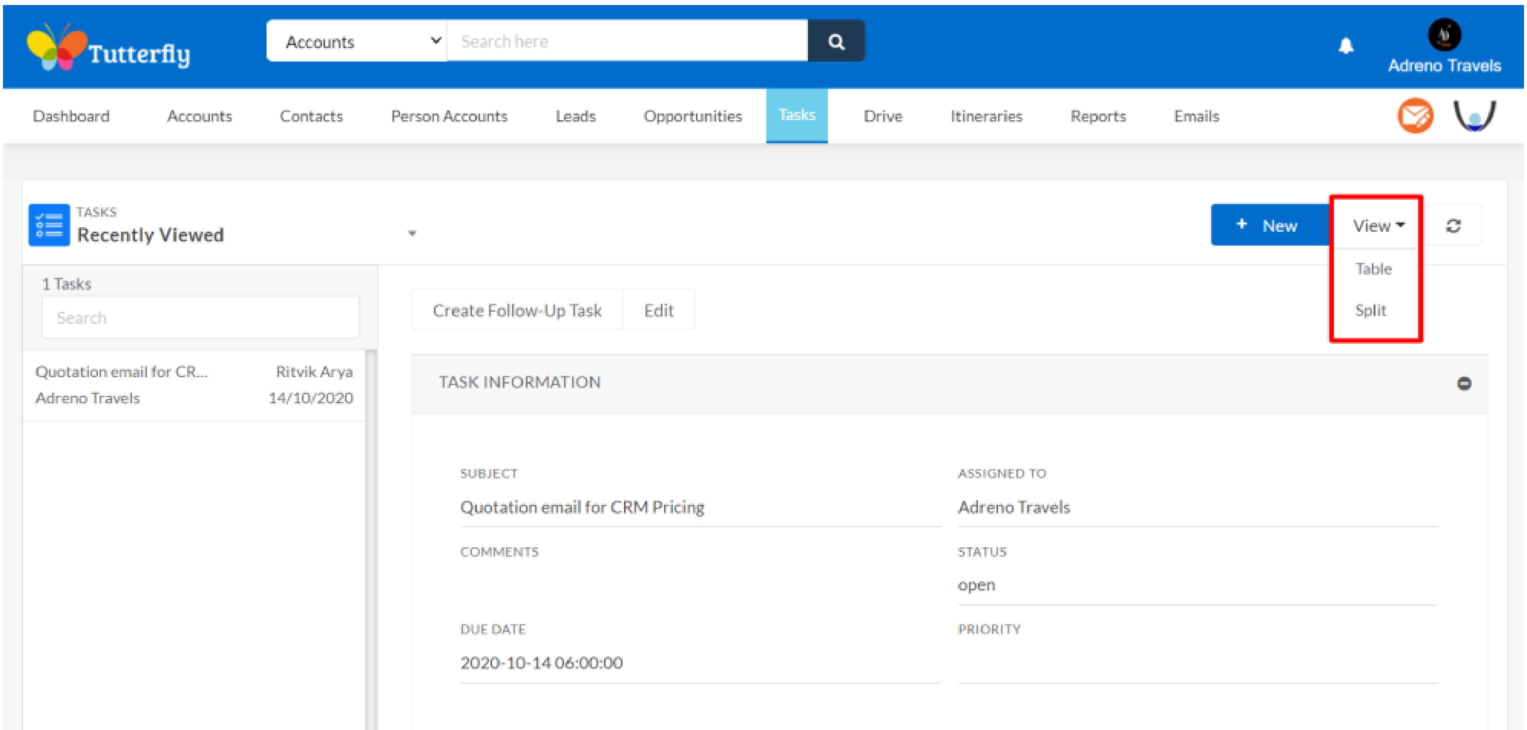
Step 3: Great! Now, click on the **'Add'** button to add a new task into the system. A message box will appear indicating that the task has been created.

• Manage Views in Tasks Section

Switch to Another View

Tasks can be accessed in two formats, namely: Table and Split View. A user can switch between the two by clicking on the **'View'** dropbox.

Step 1: Go to the Tasks tab and click on the **'View'** option from the top-right corner.



Step 2: A drop-down box will appear. Select between Table and Split View to work with Tasks.

Split View:

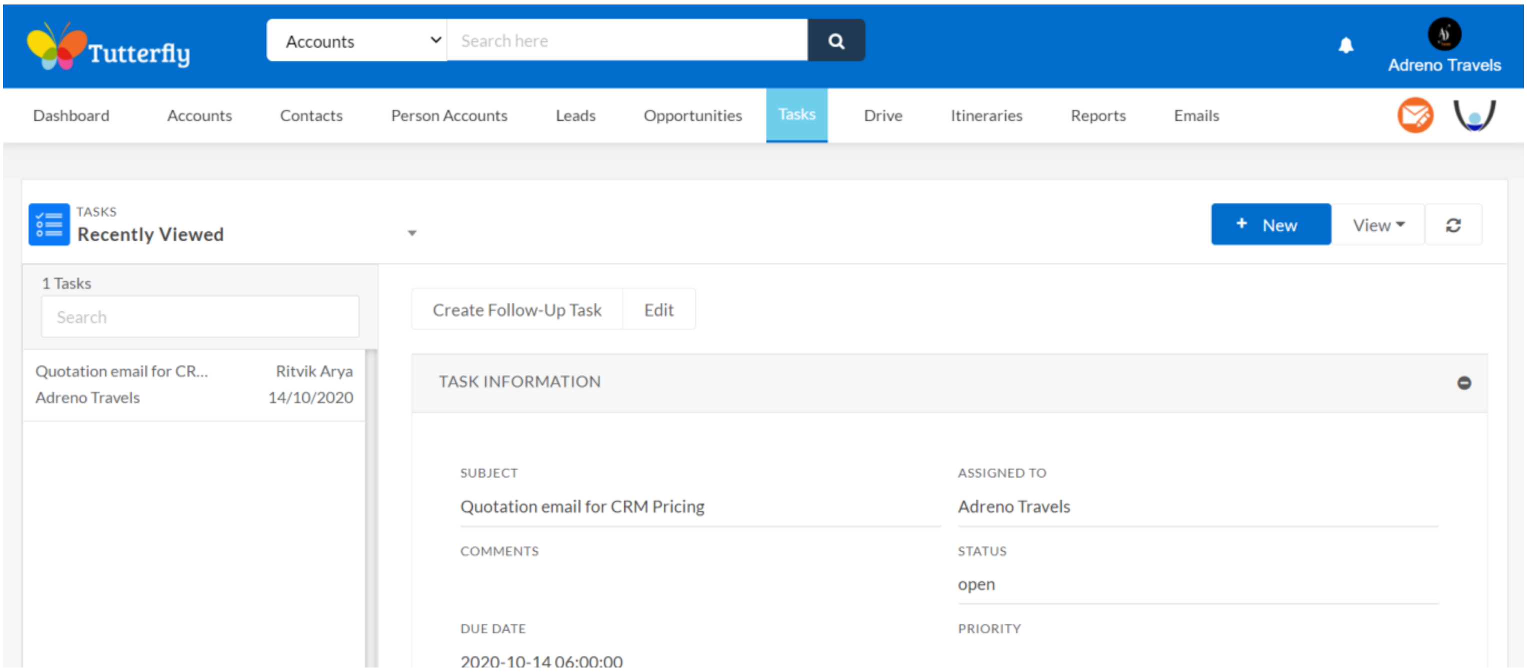
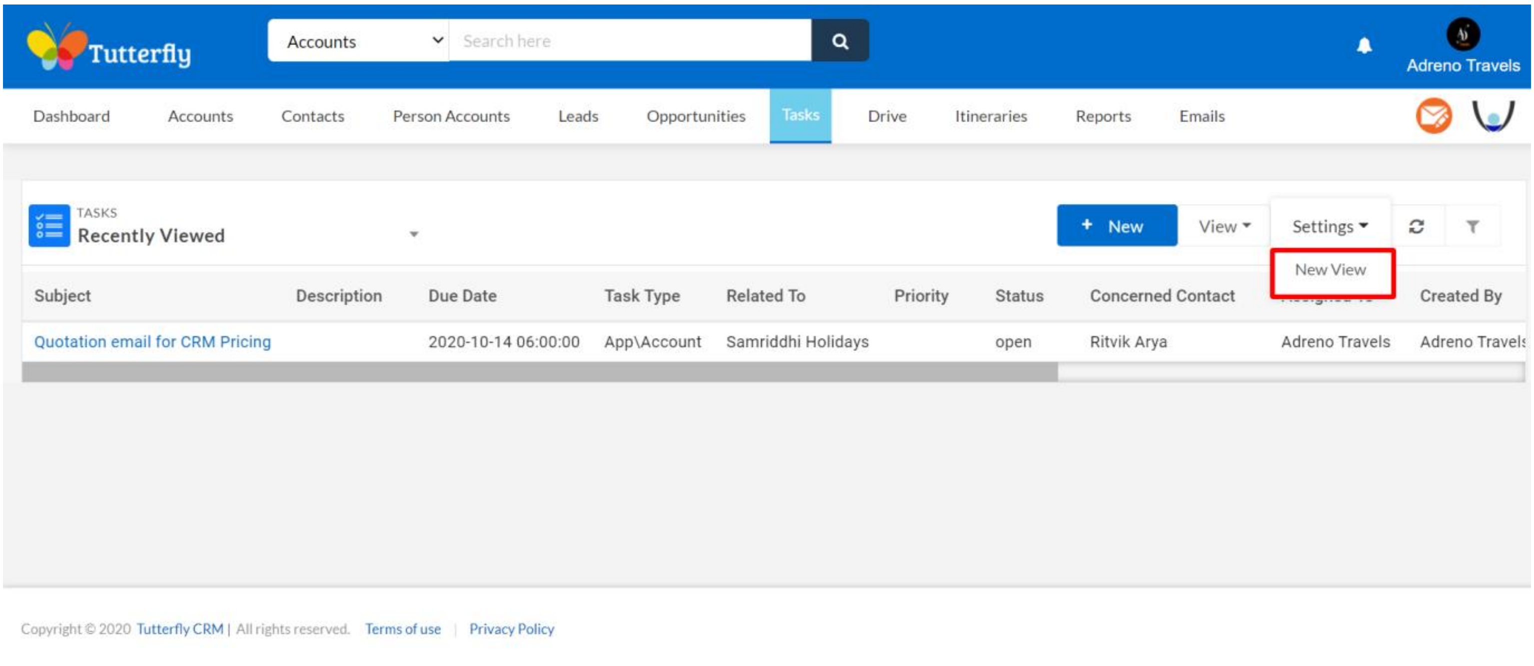


Table View:

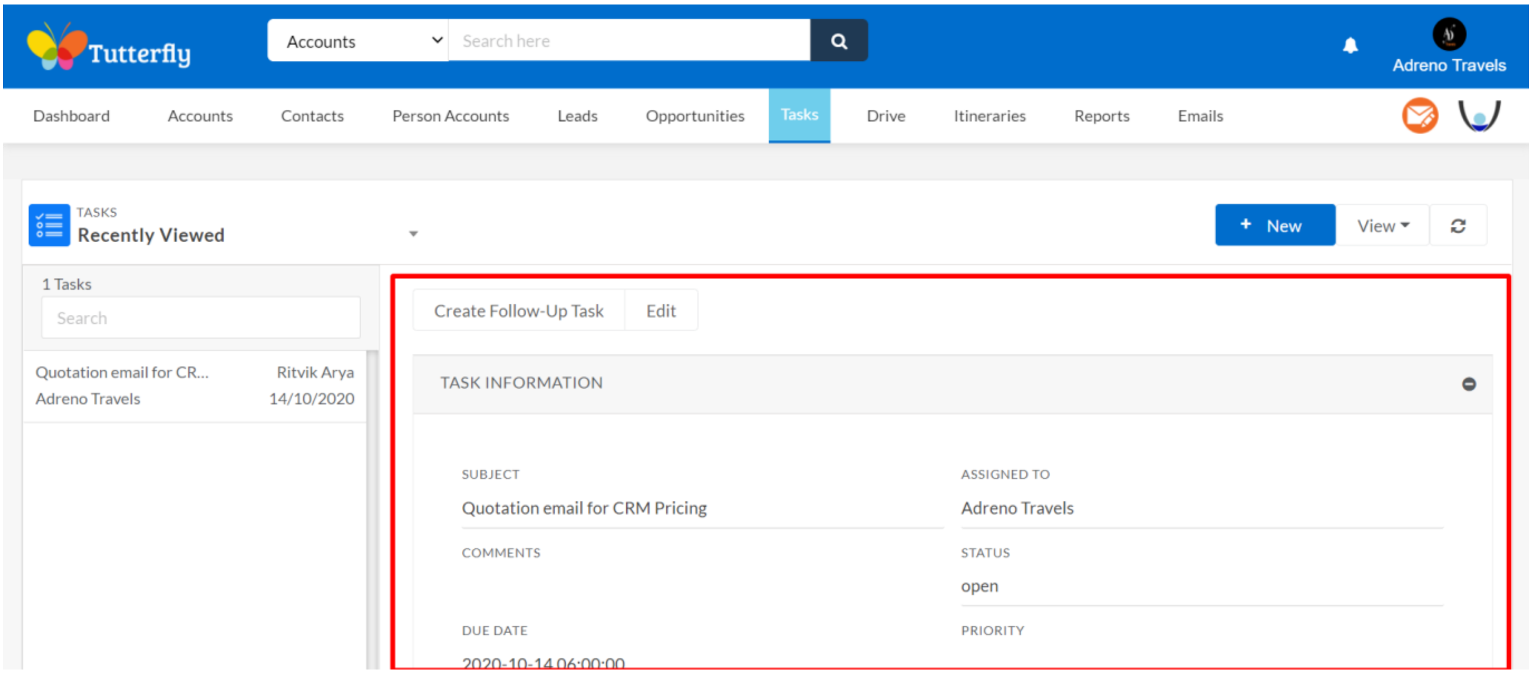


• How to Work Split View?

So, you've made it to the Split view help page! Just follow the steps below to learn all about features in split view for Tasks and how to manage them easily.

Task Information

This is the section where all the information about the Task gets mentioned. For example, **'Subject', 'Assigned To', 'Status'** etc. It provides a preview of all the details associated with the Task.

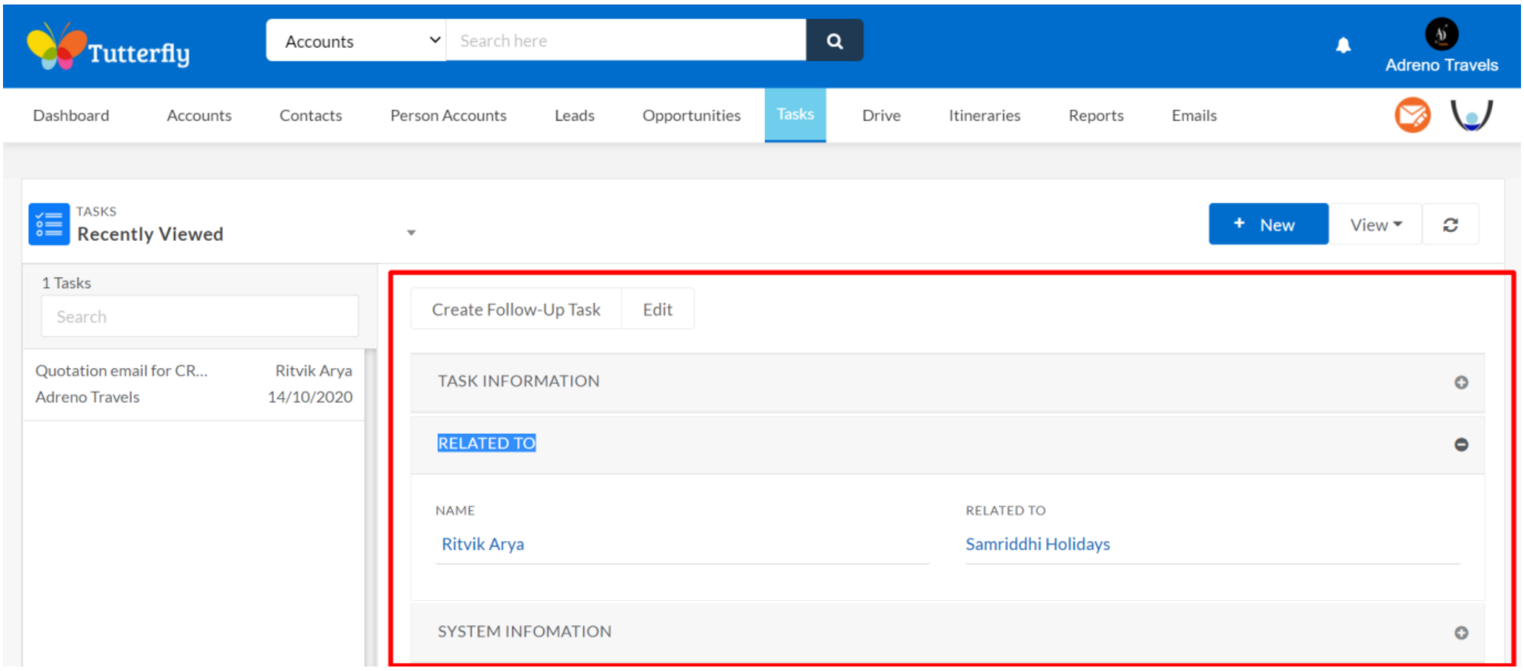


Related to

Mentions the account that is associated with the Task.

System Information

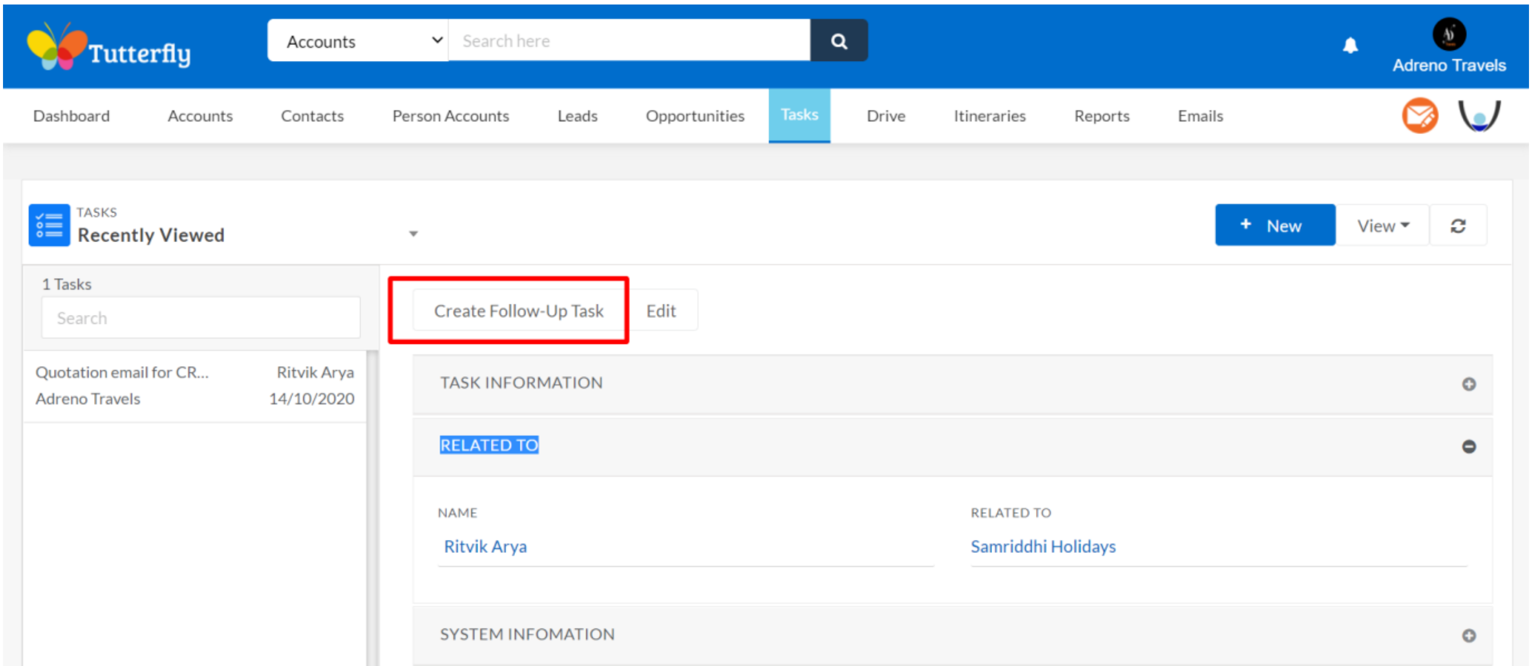
This is the final one! This displays information about the owner of the Task. It also mentions the name of the person who last edited the Task.



• Create Follow-Up Task

TutterflyCRM makes it easy for you to follow up on a Task. Continue reading to find out more.

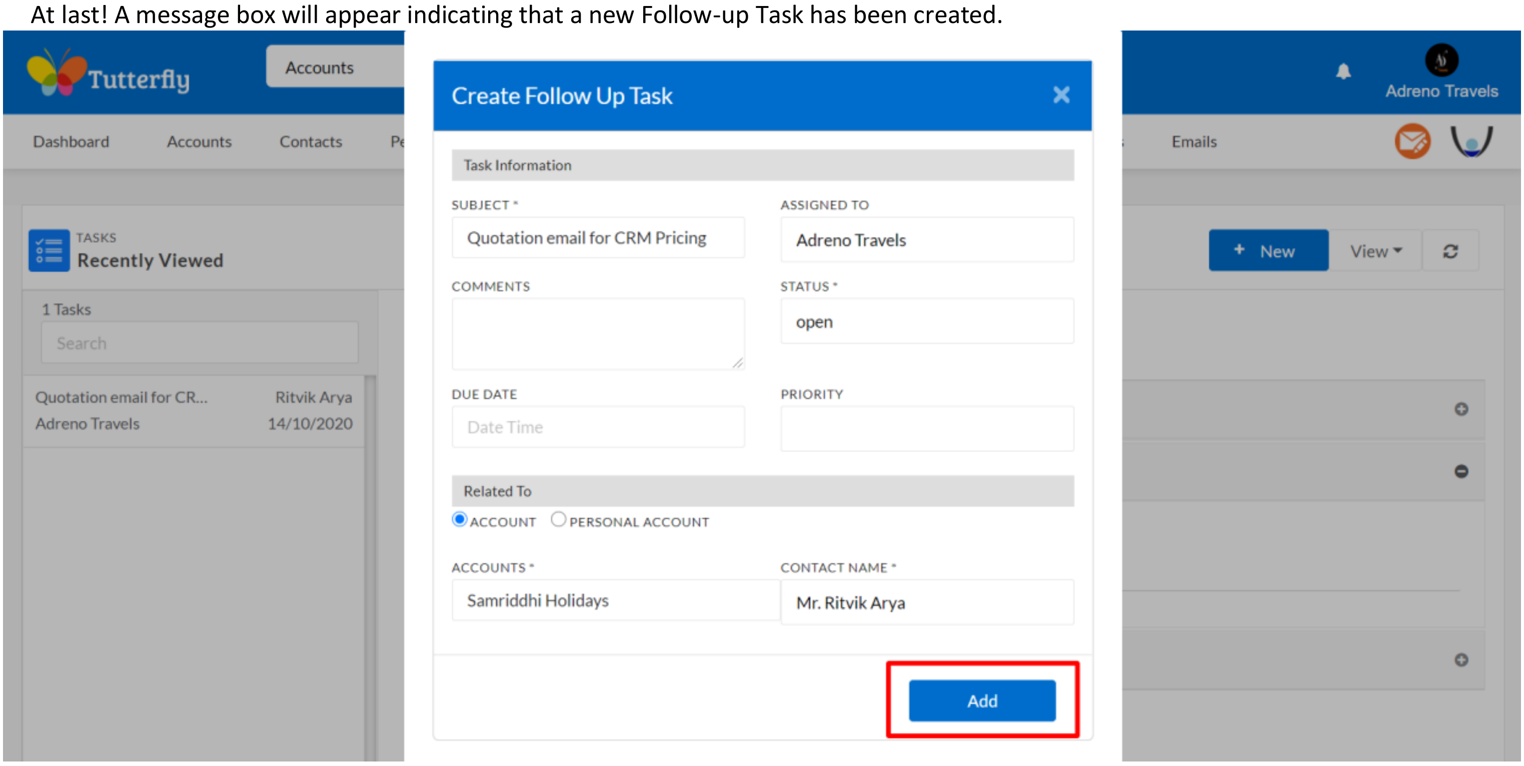
• Click on the 'Create Follow-up Task'.



Hurray! We are reaching the end of the help page. Just fill in the fields to create a follow-up Task.

Note: The subject, status fields are mandatory. If related to **'Person Accounts'**, the name of the account is a must. If related to **'Account'**, the name of the account and contact name are essential.

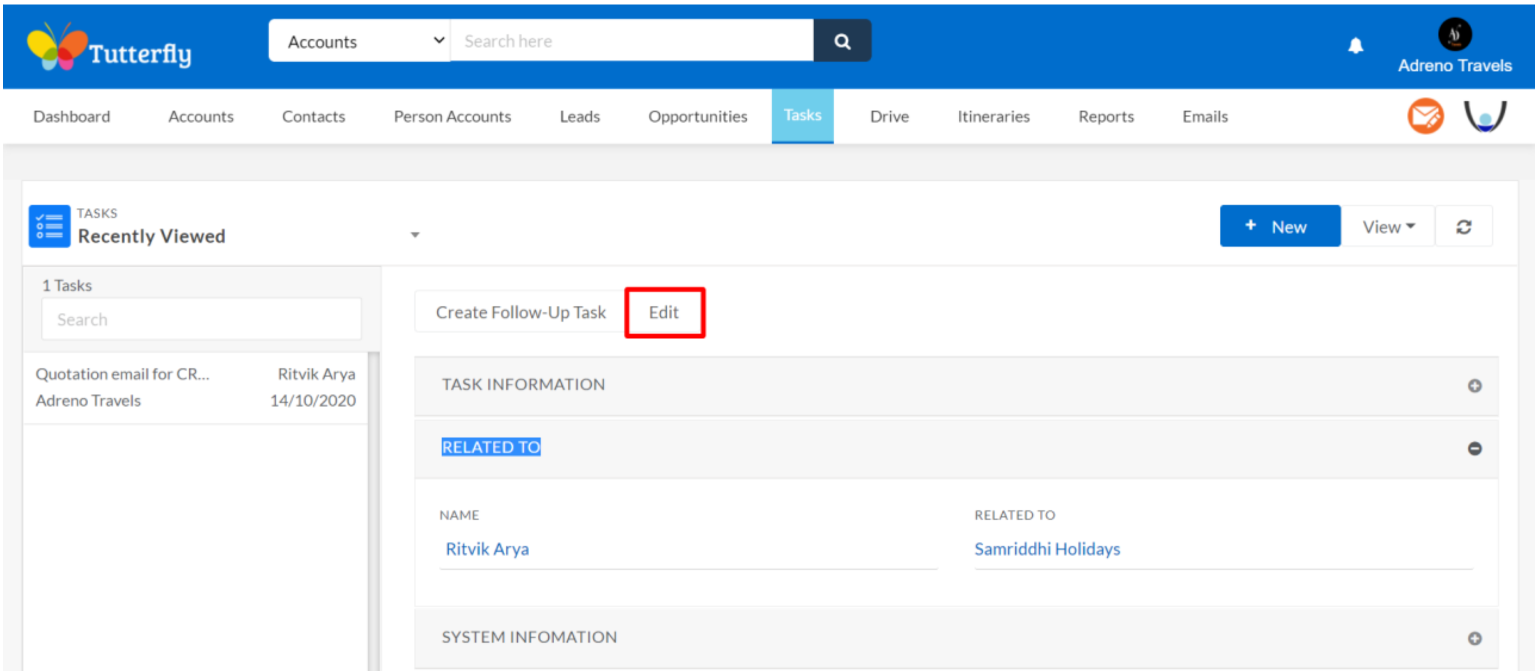
At last! A message box will appear indicating that a new Follow-up Task has been created.



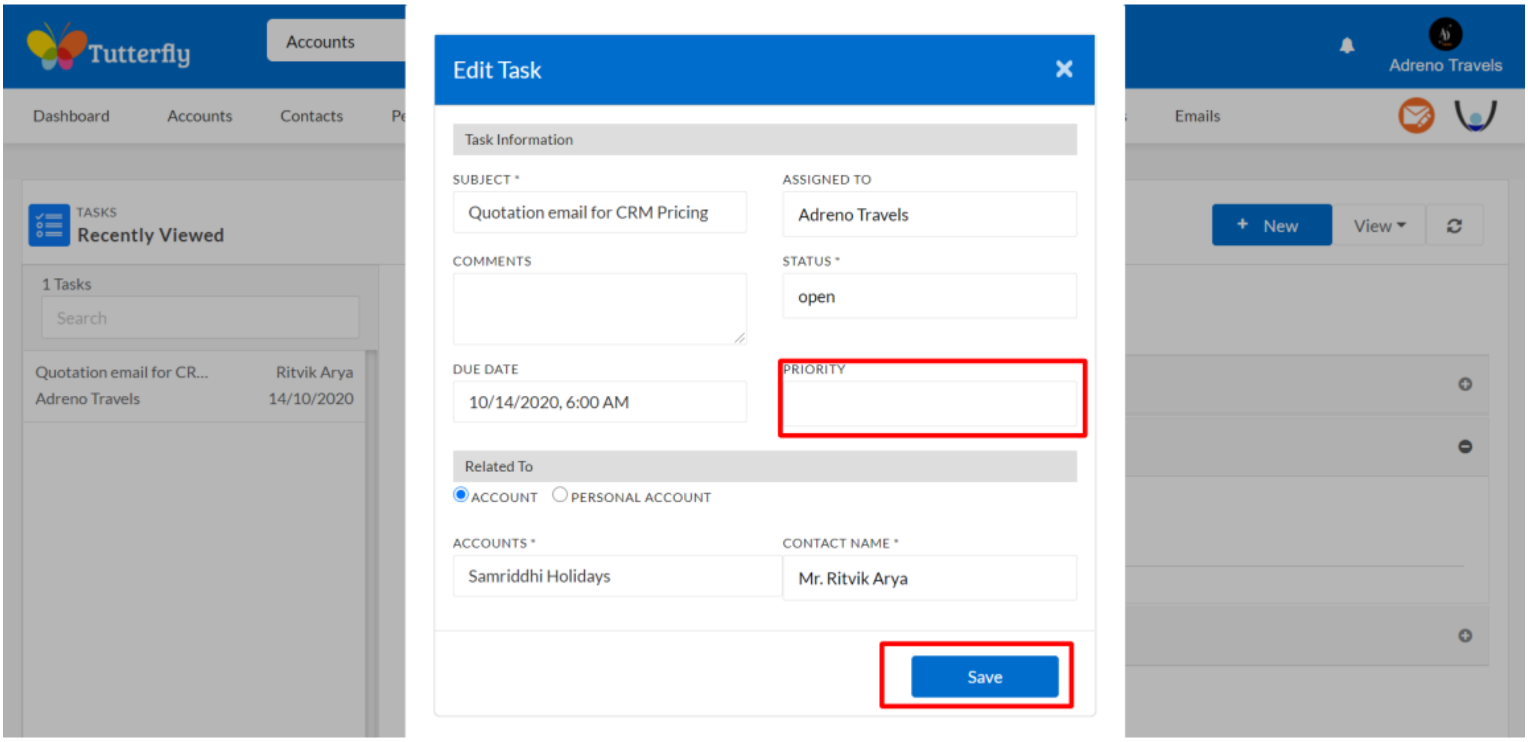
• How to Edit a Task?

This guide will help you manage priority levels. Learn to edit and manage Tasks in TutterflyCRM.

● **Click on the 'Edit' button.**

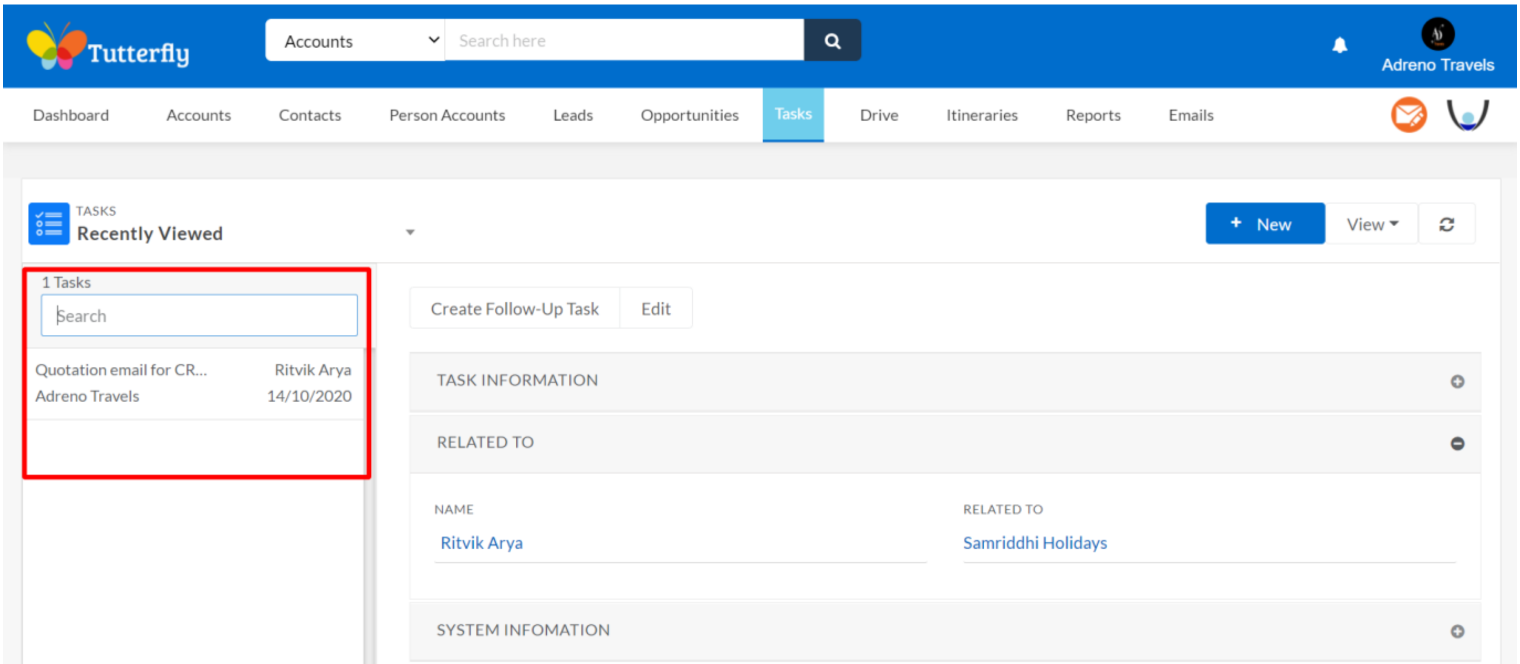


● Fill in the details to proceed to the next step.



● How to Search a Task?

To search for a particular Task from within a list of other Tasks, a user has to type a phrase or a keyword to narrow down choices for locating a task.



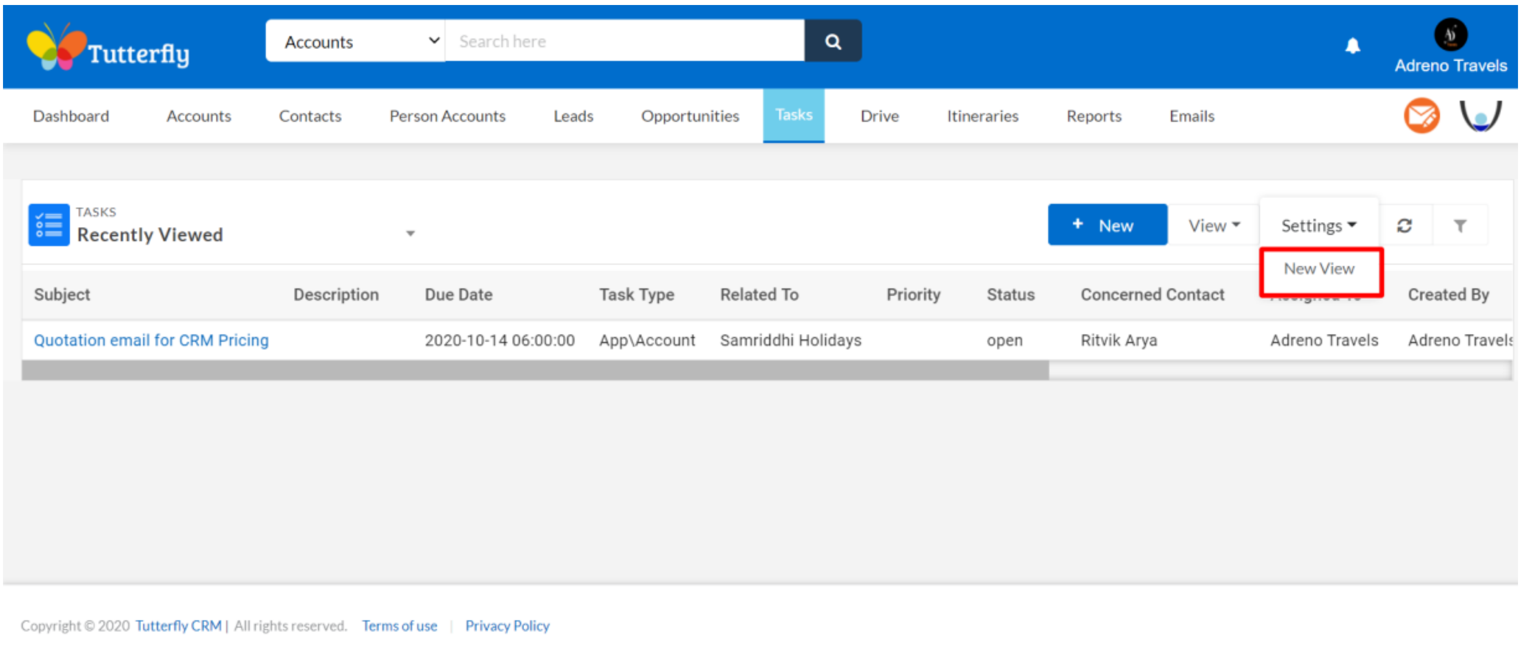
• How to Manage Views in Tasks?

Table View

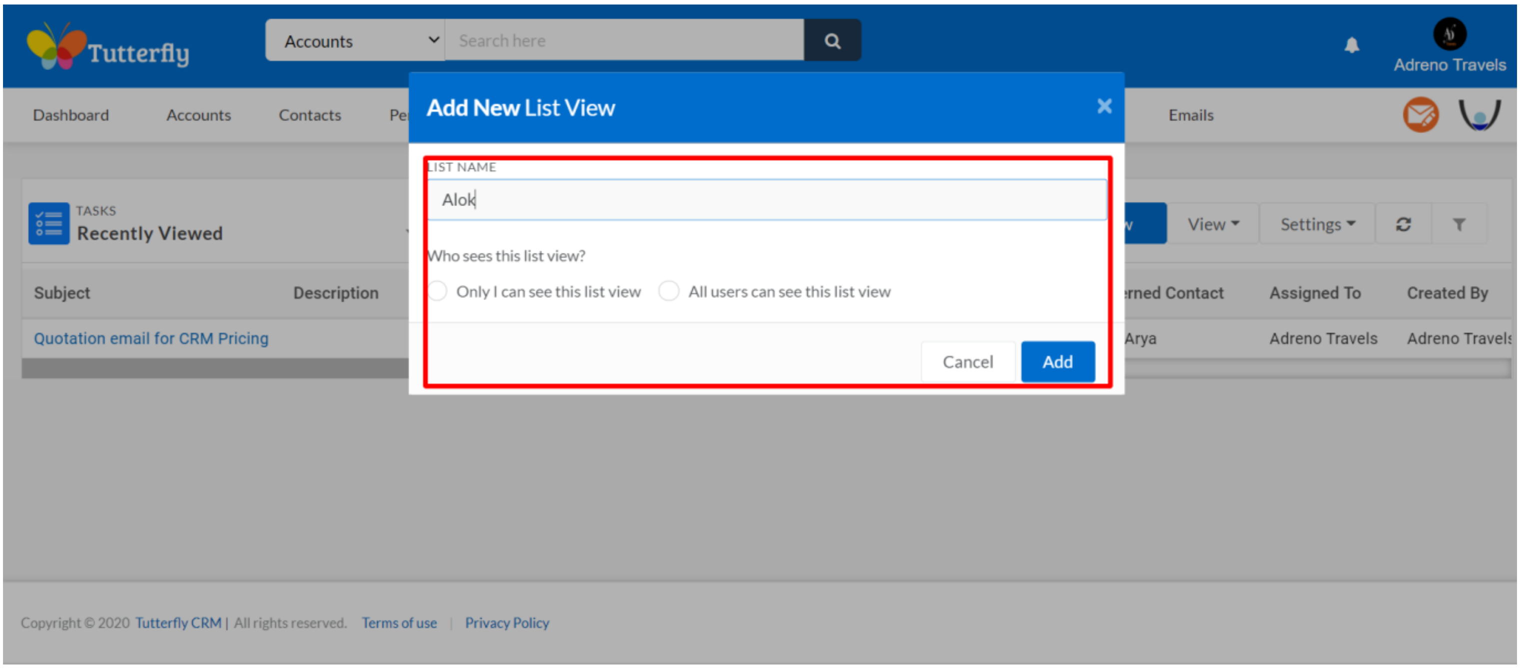
Once you have data in TutterflyCRM, you need to be able to view it! Check out these different ways to manage your data.

Create a New View in Tasks

Step 1: Click on the **Tasks >> Views >> Table>> Settings >>** New



Step 2: It will display a window that will look like the image below:

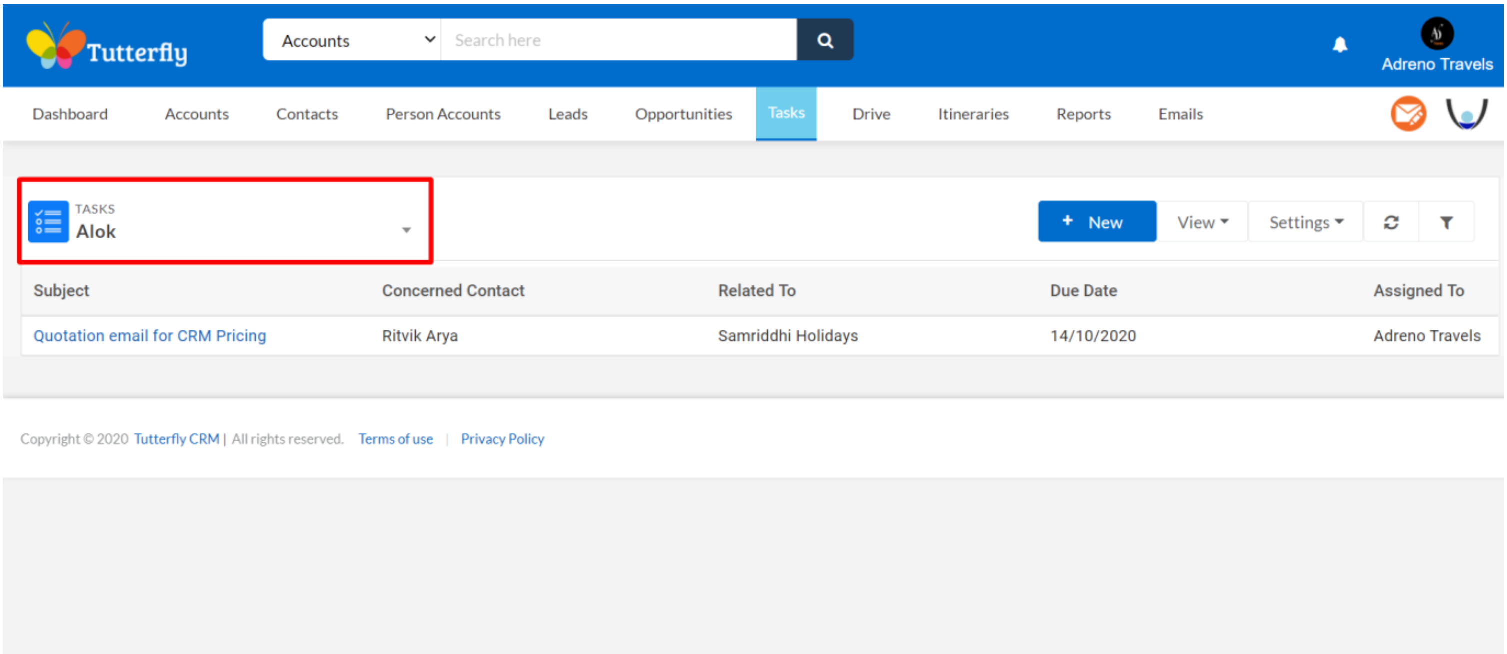


Step 3: This is the 'List-Name' and choose display settings.

Only I can see this List-View: Only the logged in user can access this View.

All users can see this List-View: All users can access this View.

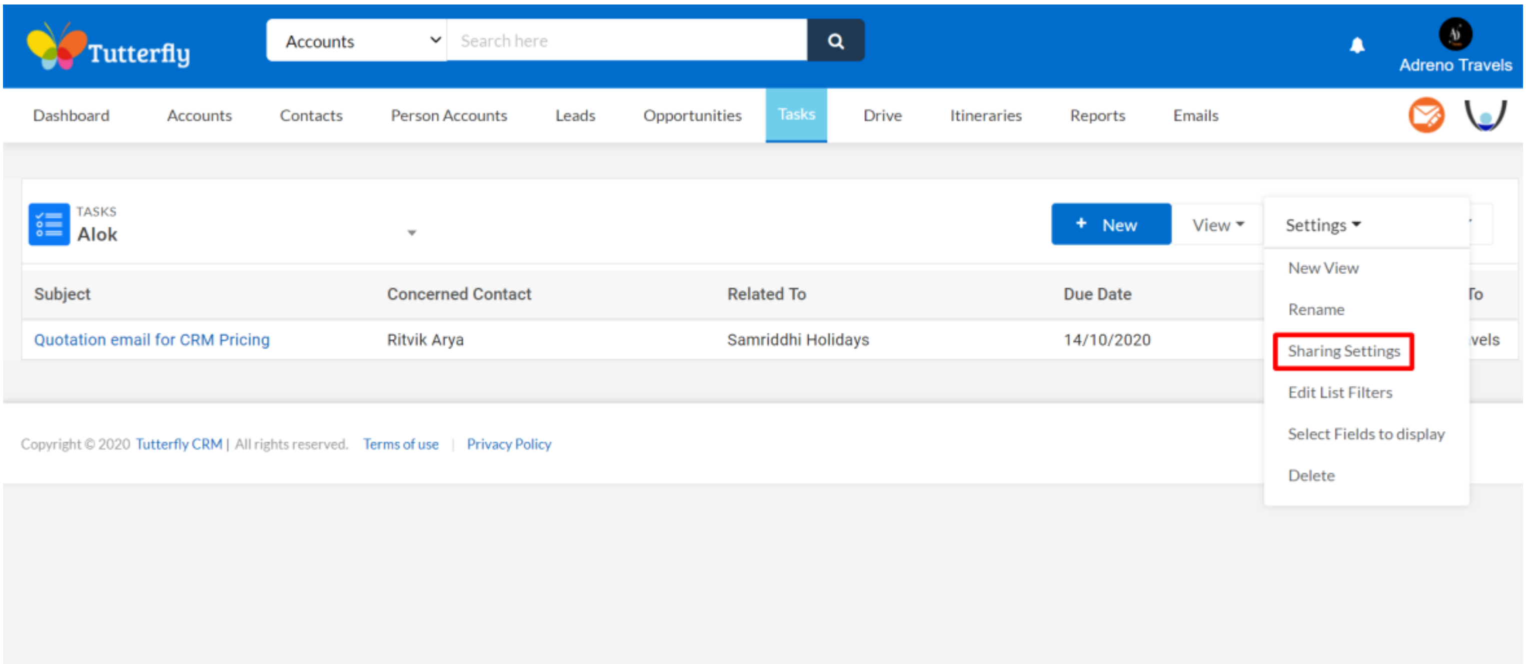
Step 4: Click on the **'Add'** button. A message box will appear indicating that a new View has been created.



• Change the Sharing Setting

In TutterflyCRM, a user can control access to some parts of the data by using share settings. Listed below are steps to limit other users from accessing important data.

Step 1: Go to **Settings >> Sharing Settings**. A box will appear like the one shown in this image below:

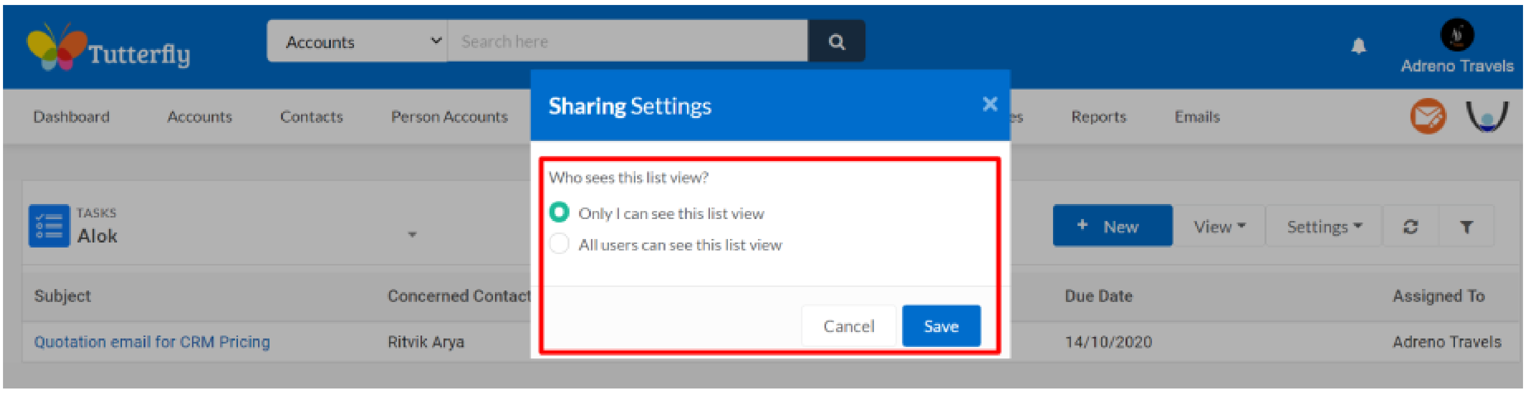


Step 2: From the **'Sharing Settings'** box, select the options to set the privacy level.

Only I can see this List-View: Only the logged in user can see this View.

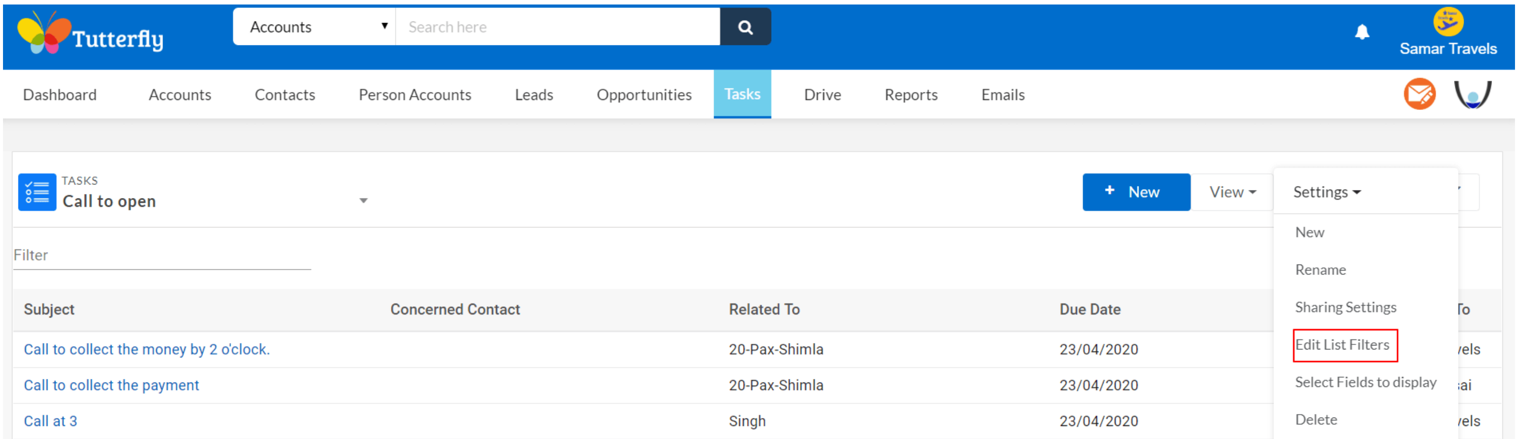
All users can see this List-View: All users can access this View.

Step 3: Then, click on the **'Save'** button.



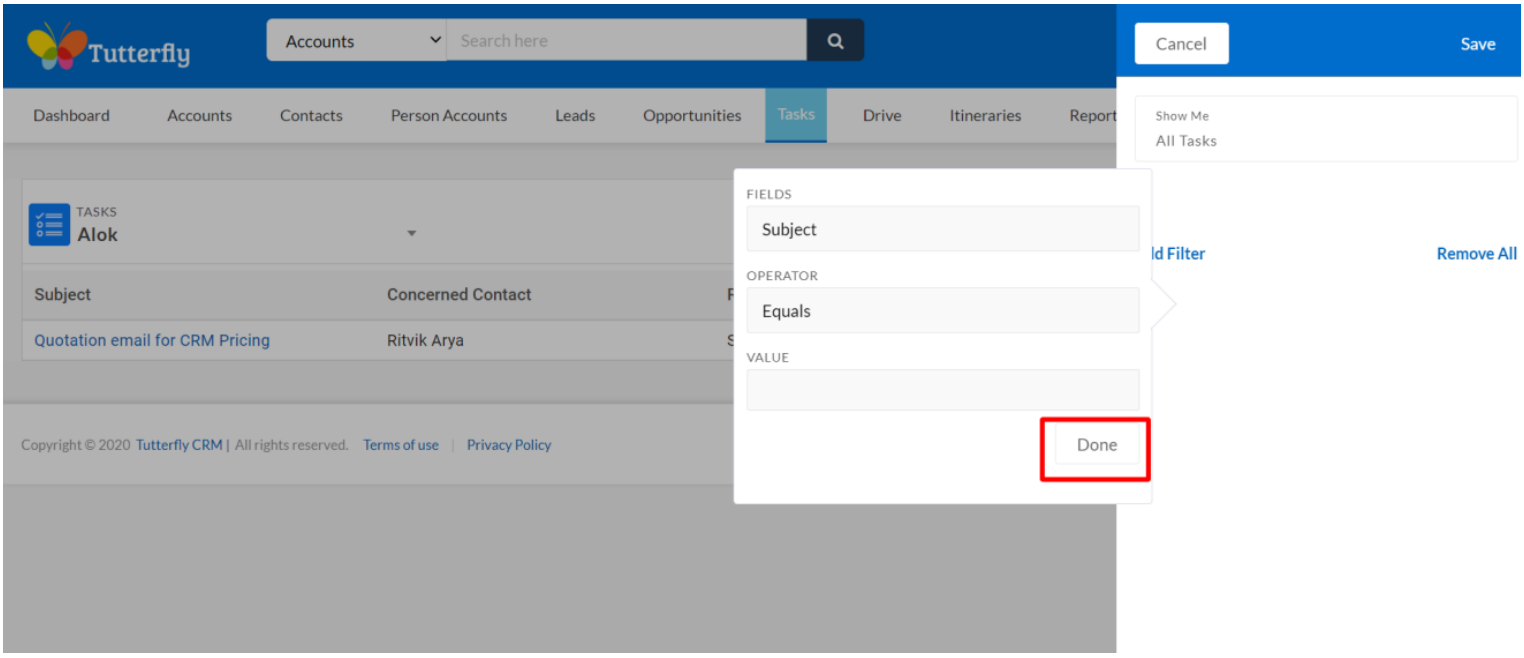
Edit List Filters

Step 1: Go to **'Settings'** and click on 'Edit List Filters'. A pop-up will appear in the right-hand corner. Just like the one shown in the window below.



Note: This pop-up can also appear by clicking the filter icon.

Step 3: A user can change visibility settings, click on **'Show Me'** box. A user has to choose be-tween **'All Accounts'** and **'My Accounts'** and click on the **'Done'** button.

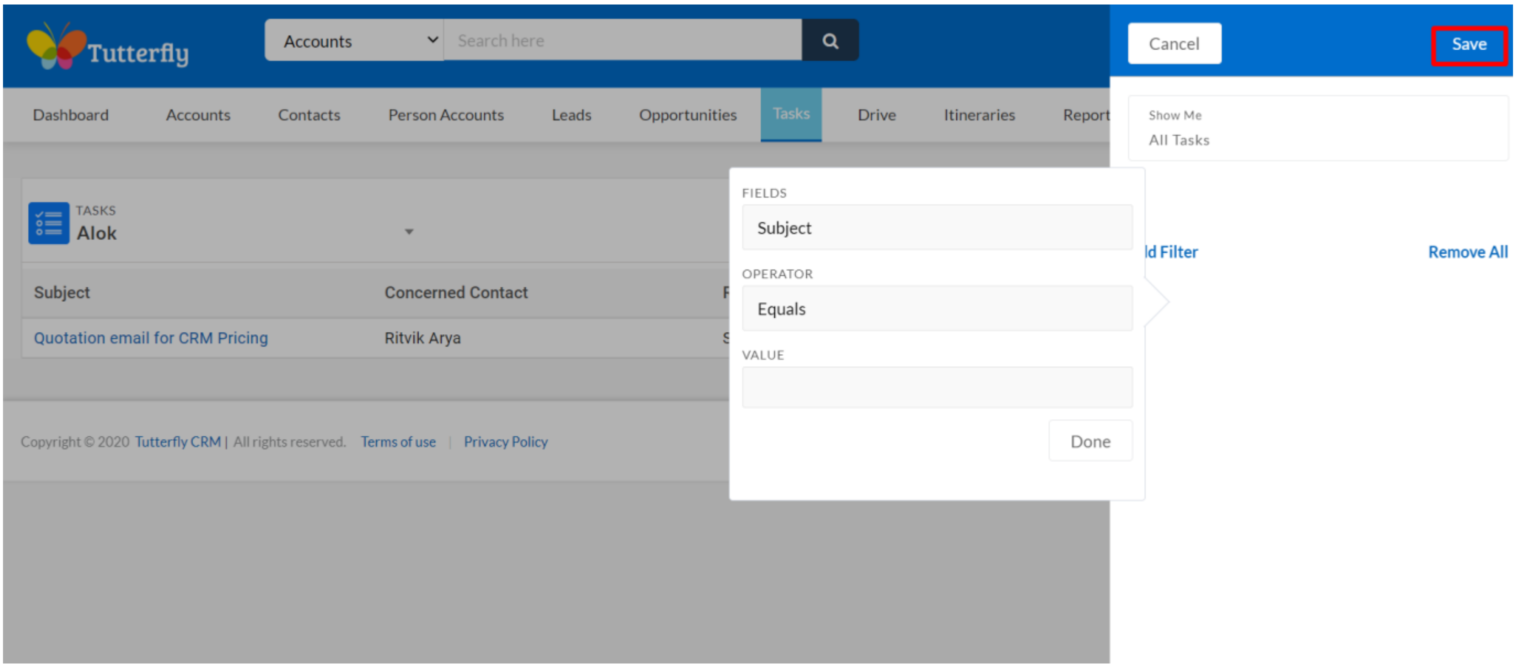


All Accounts: A user can apply a filter to View all the tasks created by the admin and other agents.

My Accounts: A user can apply a filter to a View showing only the tasks created by the user.

Step 4: Congratulations! We are just near the end. Click on **'Add Filter'** and fill in details such as a field, operator, and value. Next, click on the **'Done'** button.

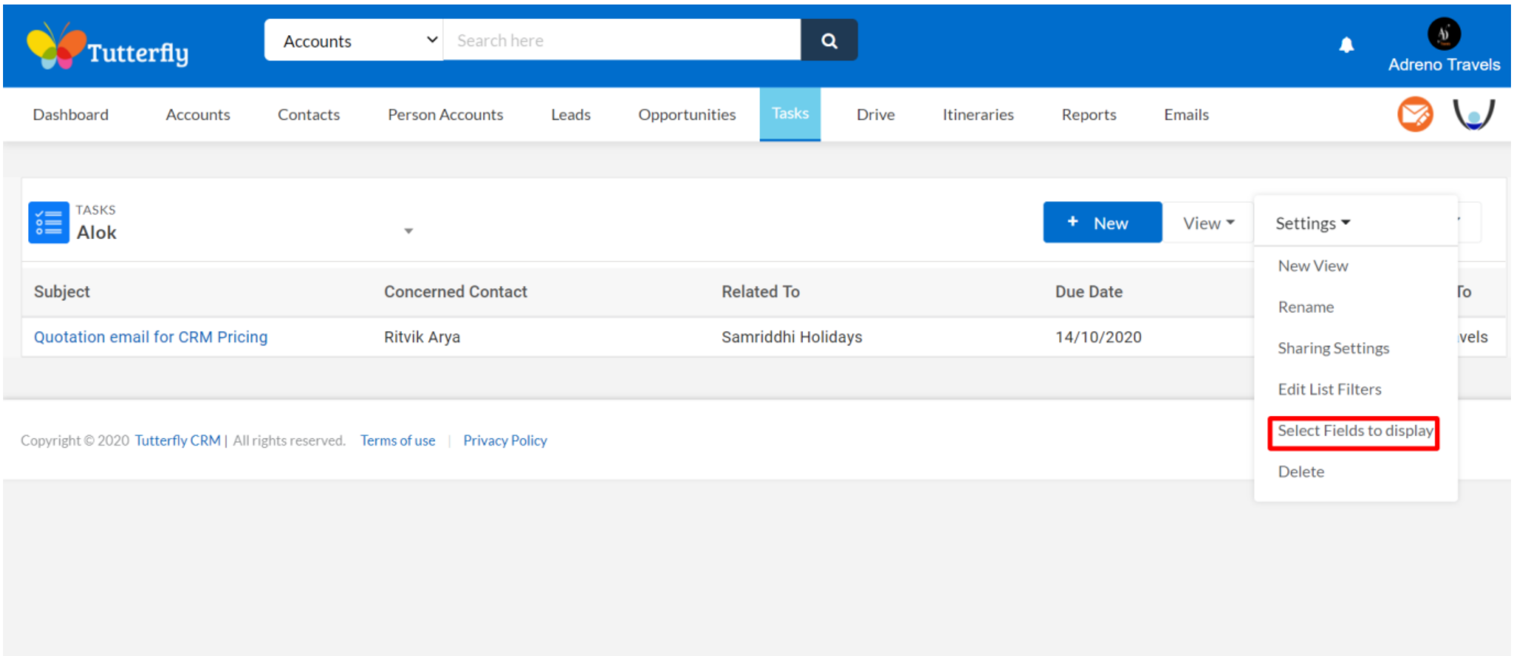
Step 5: Finally! Click the **'Save'** button to save the changes made.



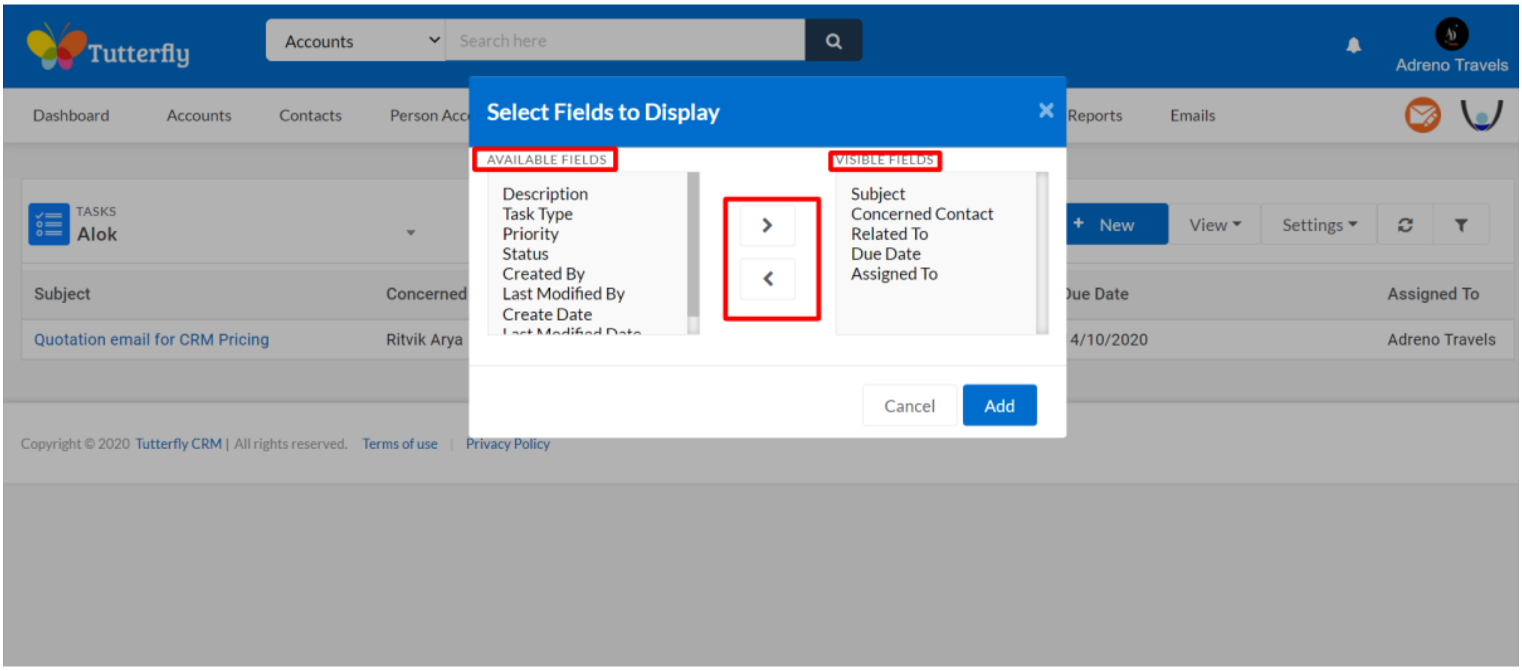
Note: These changes cannot be performed to the default View. A user has to create a new View and implement actions to that View.

• How to select fields to display:

Step 1: click on Select fields to display:



The new screen will pop up and you can select the option by clicking >> button.



● How to Create a New Opportunity?

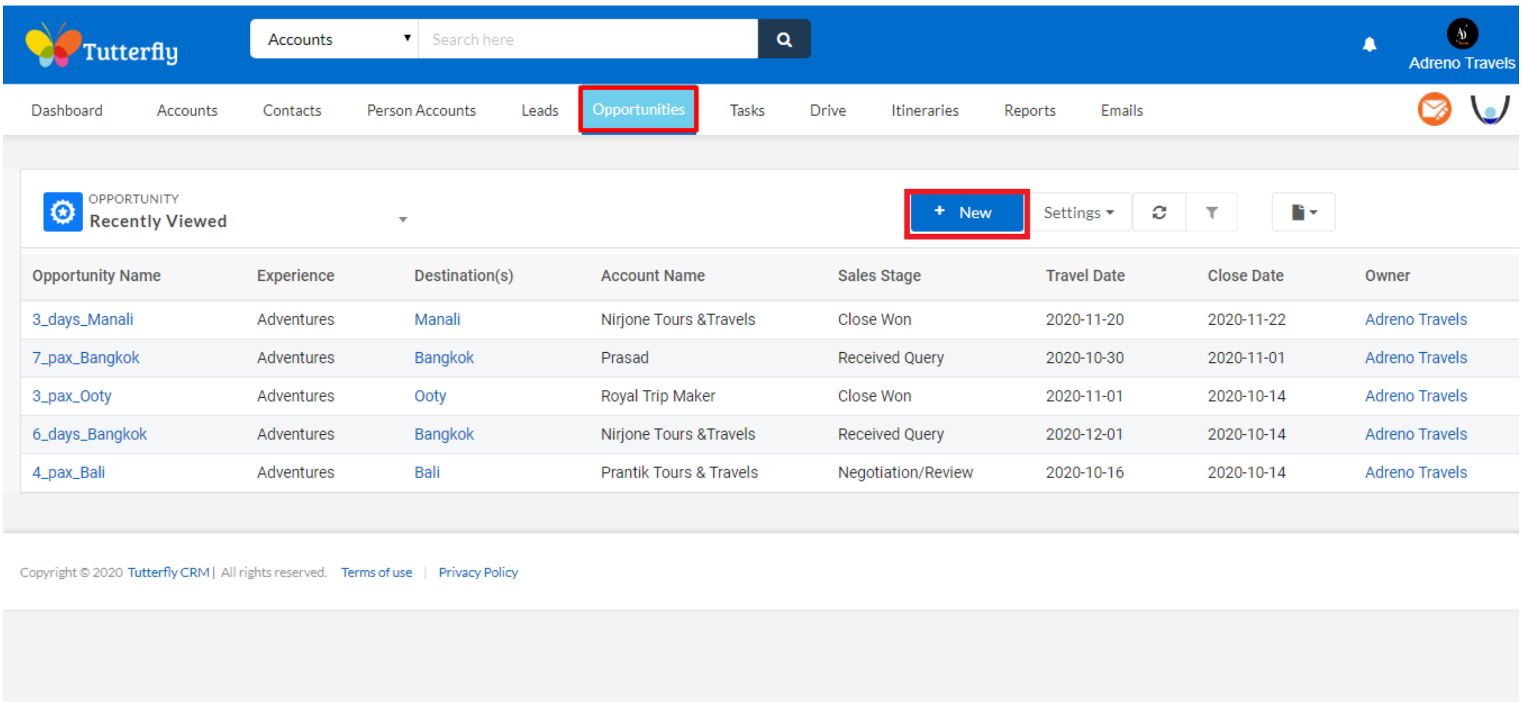
TutterflyCRM helps to log all deals that have a probability of turning to business. Continue reading to find out more.

What are ‘Opportunities’?

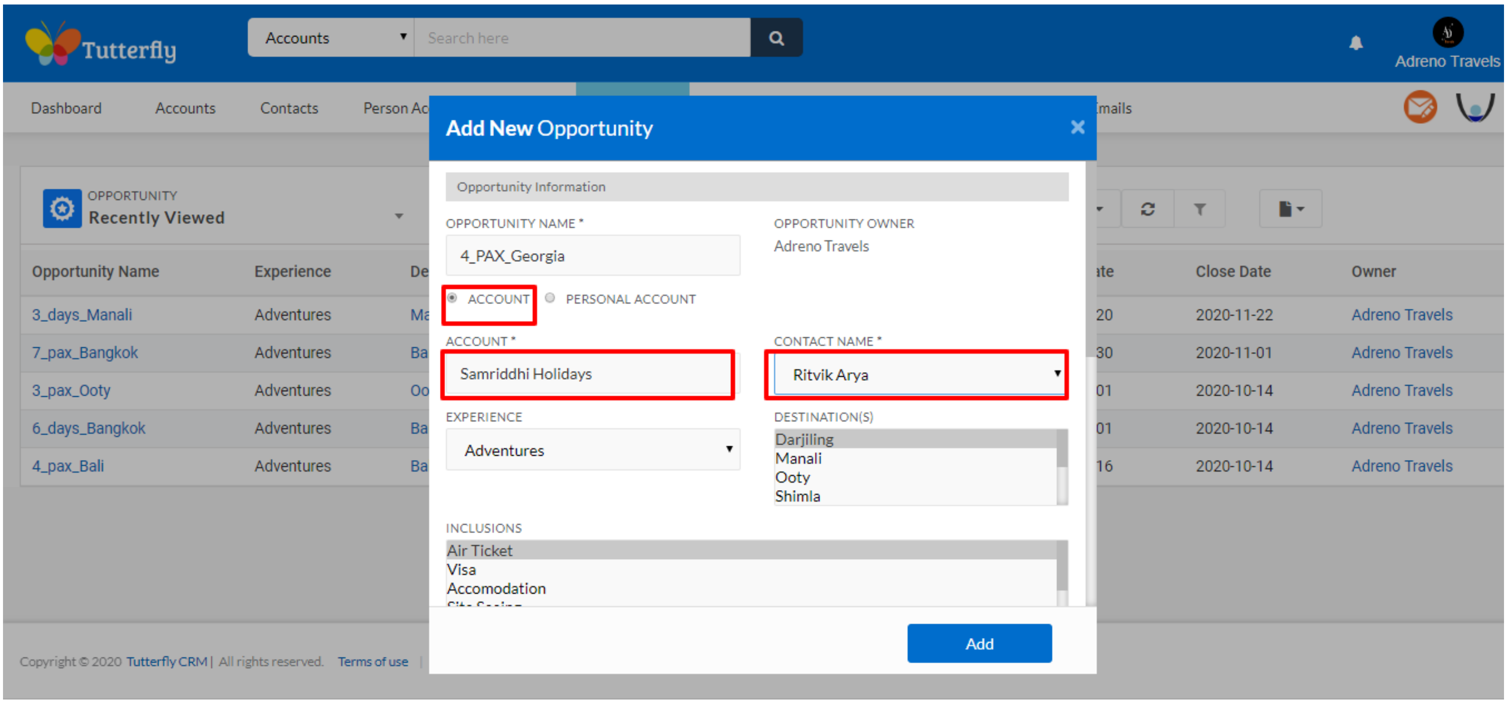
Opportunities record all the details about ongoing deals. This includes accounts that are related to and can amount to potential sales.

Create a New Opportunity

Step 1: Click on the opportunity tab to view listing screen of opportunities. To create a new Opportunity go to Opportunities tab and click on the ‗+New‘ button.

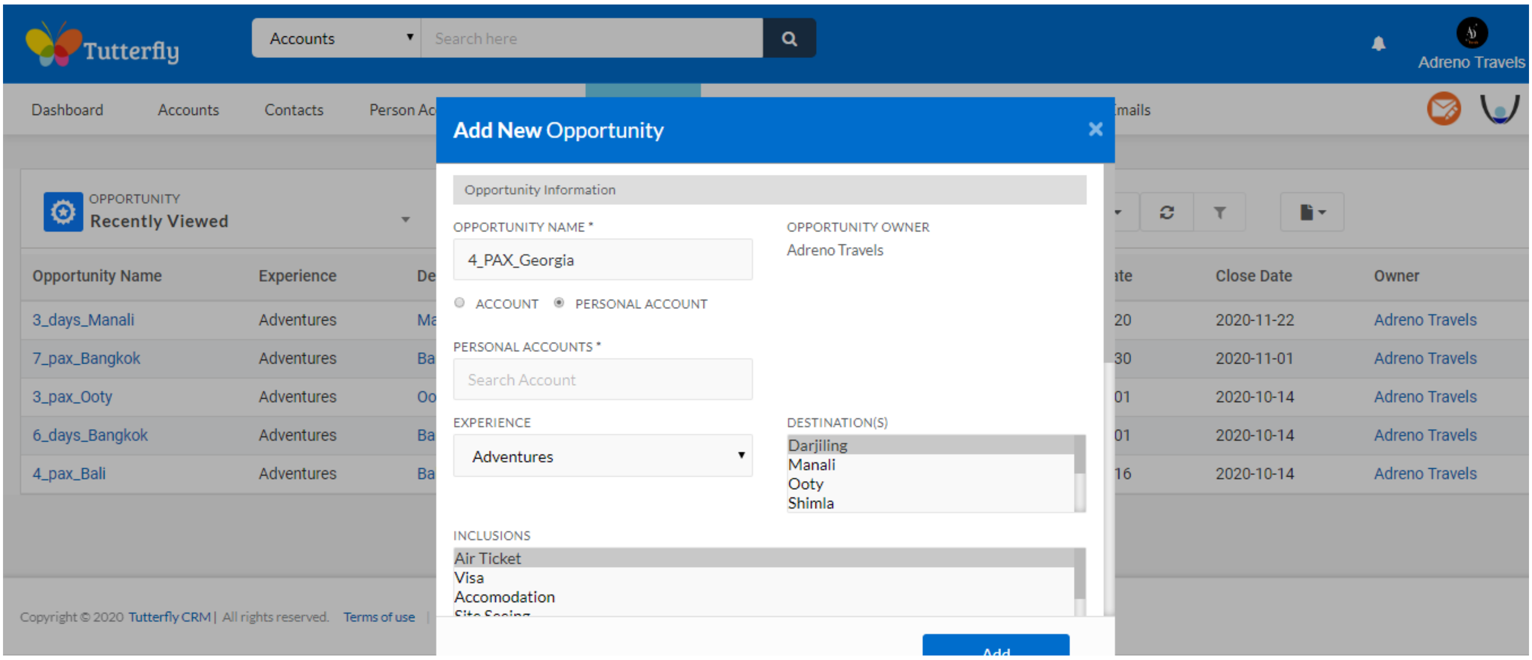


Step 2: The Opportunity form will appear. Fill all the mandatory details. If an Opportunity is related to an account then, Opportunity name, account name, contacts and Opportunity destination are the mandatory fields.



Inclusion defines the services included in the tour package provided by the tour management company.

● If a person account is selected, then Opportunity name, person account name and destination will be the mandatory fields which one are highlighted with the *.

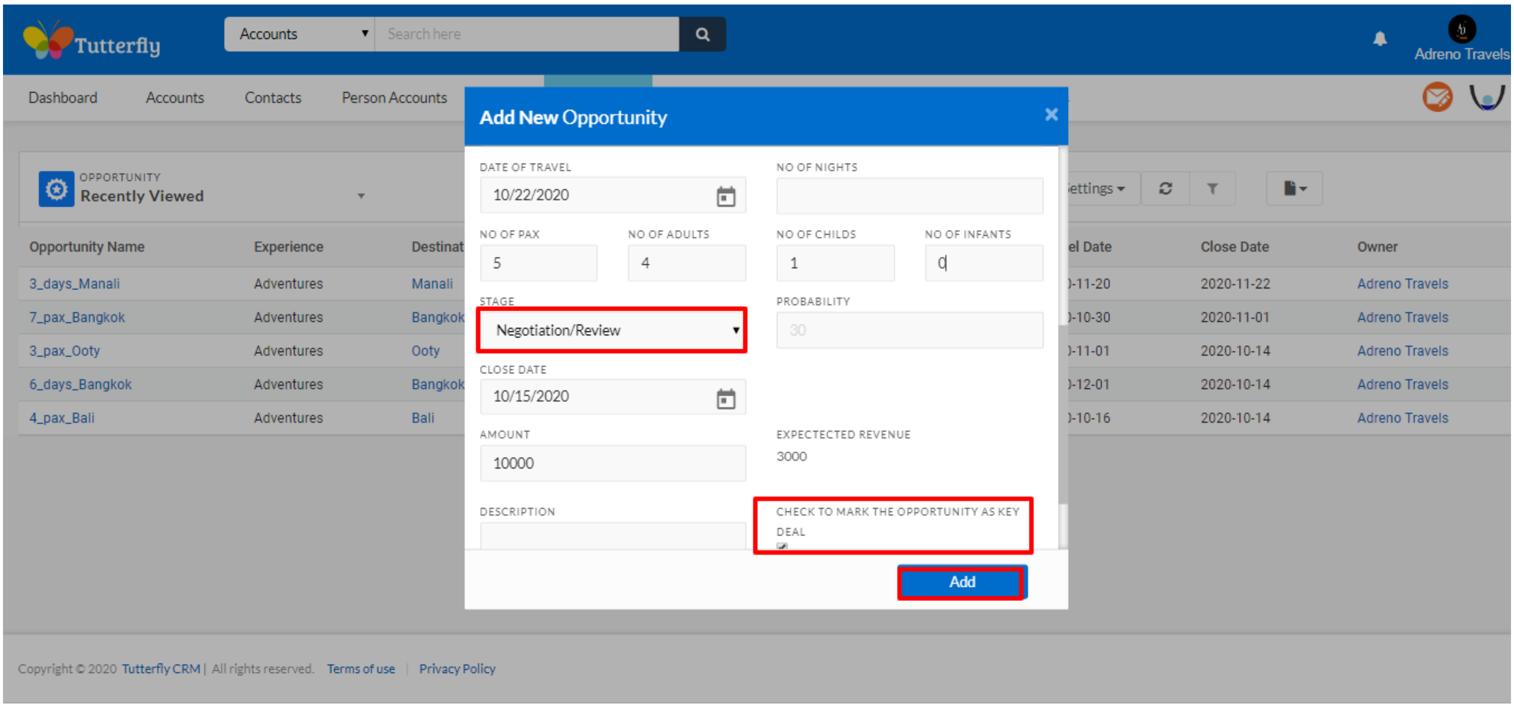


Opportunity Stages:

There are five default stages in Opportunity section associated with the relevant probability percentage that calculates the expected revenue. Amount*stage probability/100.

Step 3: At last! While an Opportunity is marked as a key event it will reflect on the dashboard marked as an important one.

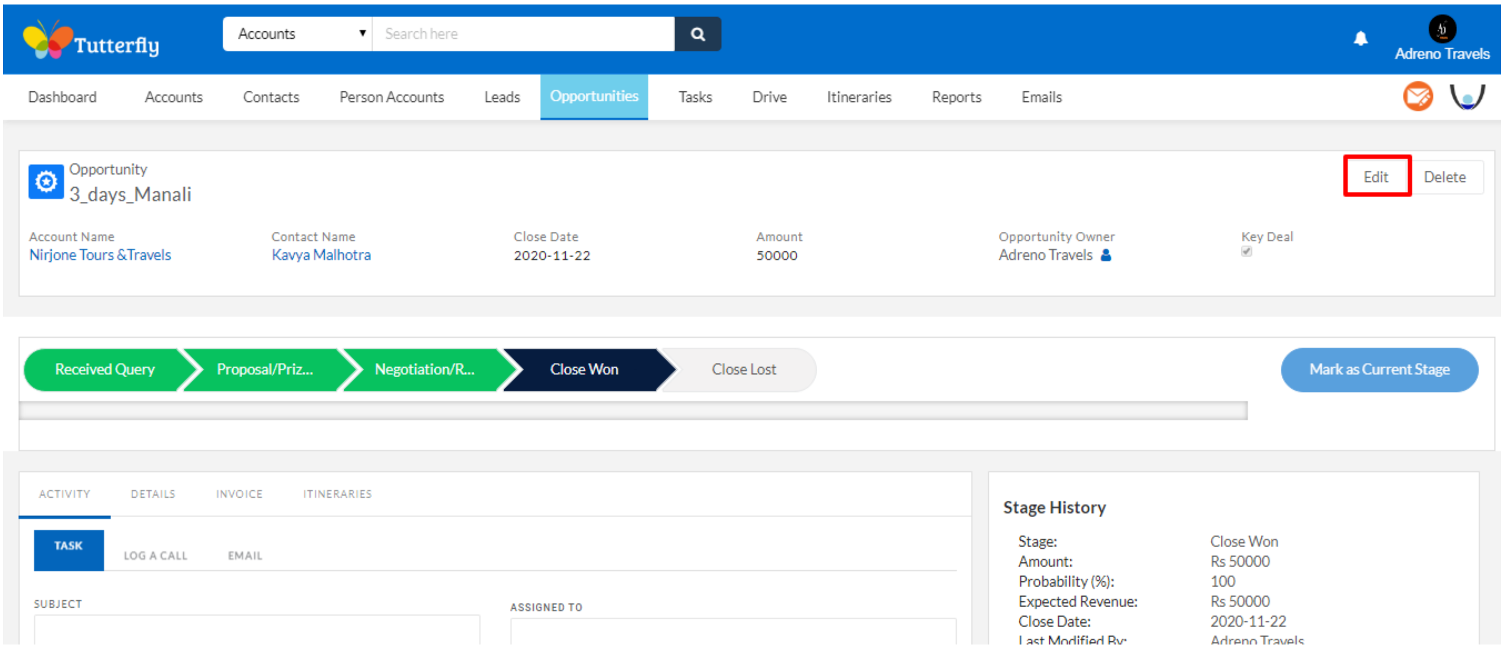
Step 4: Wow! We are almost at the end. Click on the **'Add'** button to create an Opportunity.



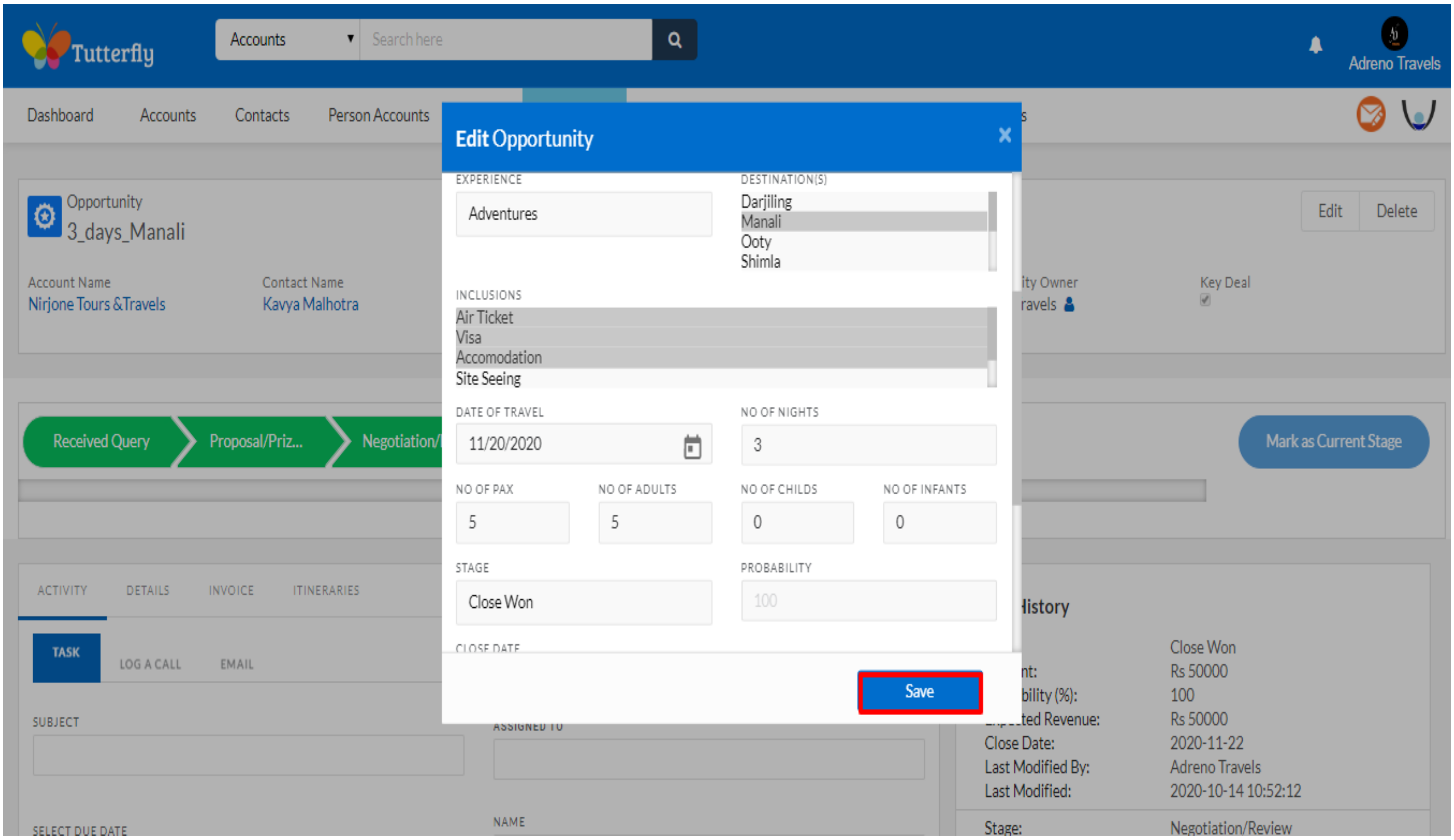
• How to Edit an Opportunity?

Make changes to details about any Opportunity saved on TutterflyCRM. Here's how:

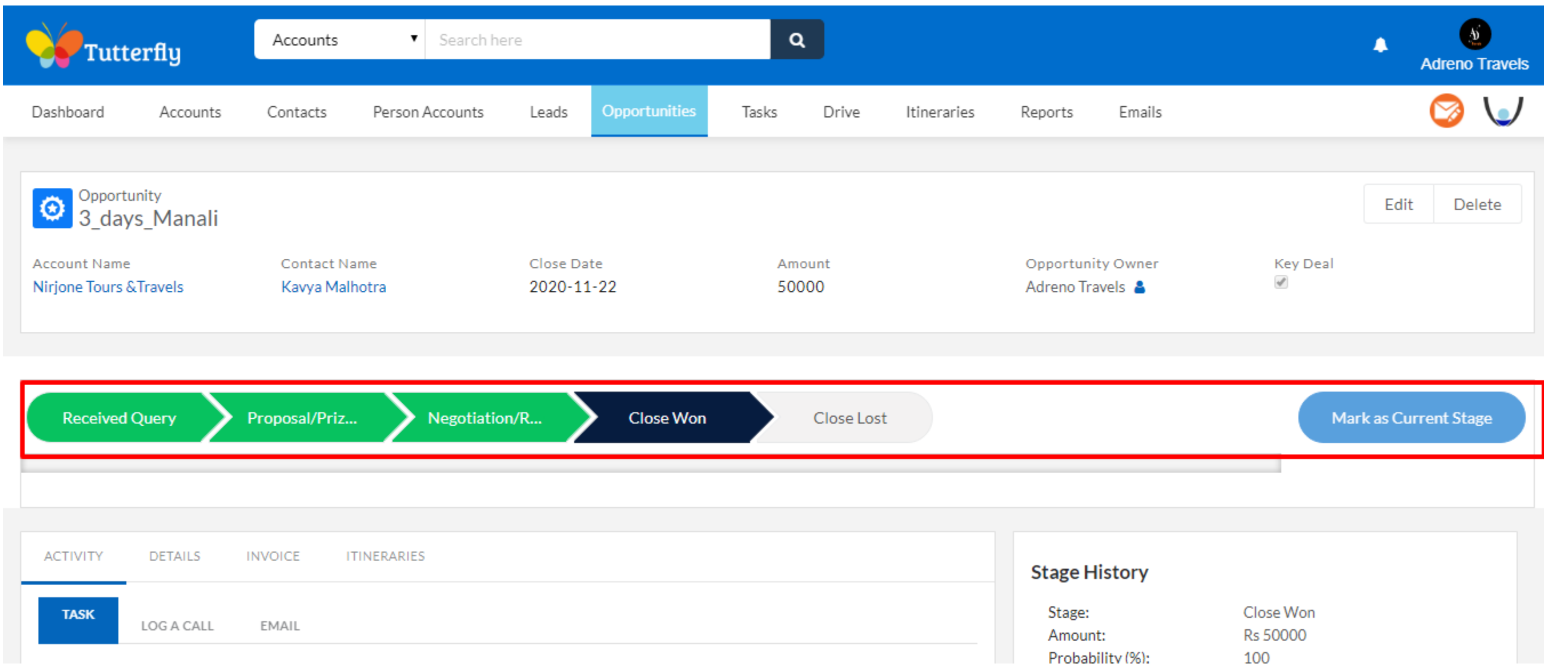
Step 1: Select the Opportunity which you want to update. Click on the Edit button from the top-right corner.



Step 2: From the **"Edit Opportunity"** window, make changes in the fields which you want to update and click on the **'Save'** button.



Step 3: Congratulations! This is the final one. You can also make changes in the stages without clicking on the edit button. This can be achieved by the graphical representation of each stage on the Opportunity's internal page. Select the stage at which your query exists and click on 'Mark as Current Stage' to change the state of Opportunity.



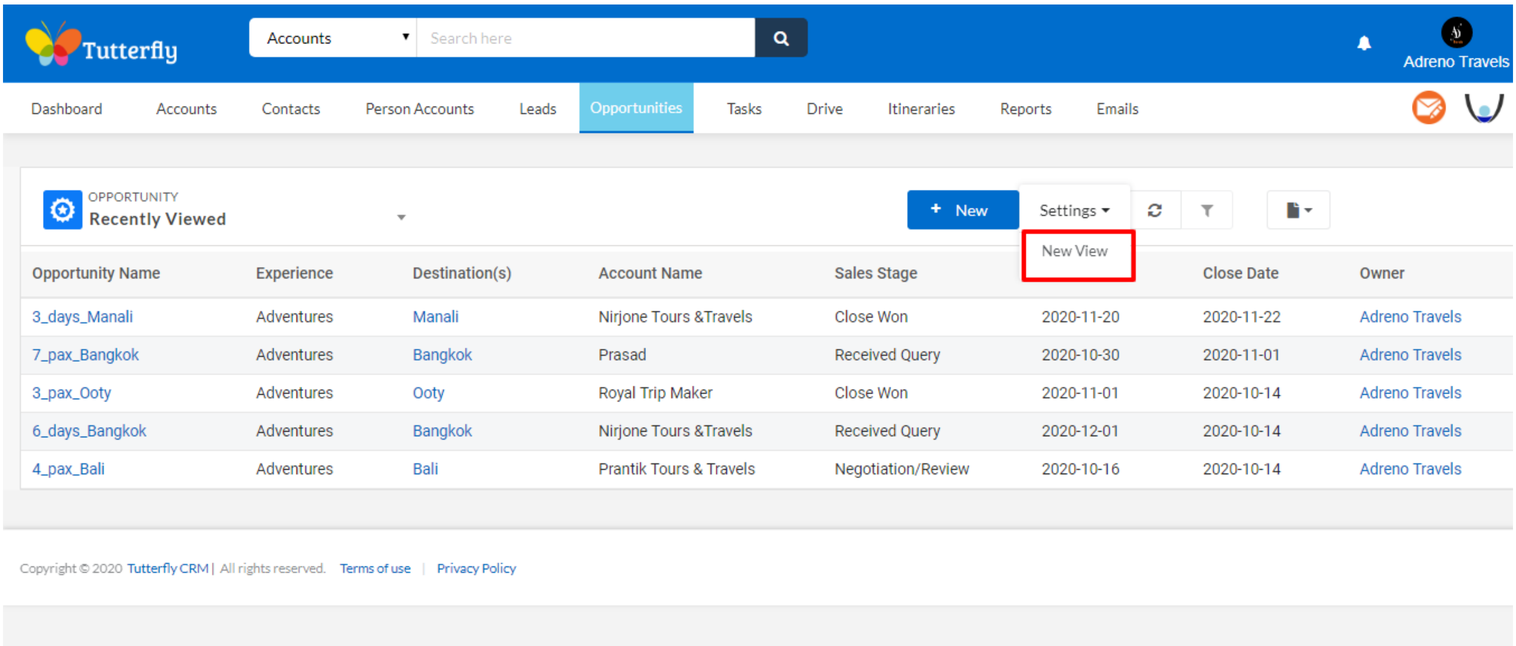
Also, stage history defines the cycle through which the Opportunity moved upon.

• Create and Manage Views

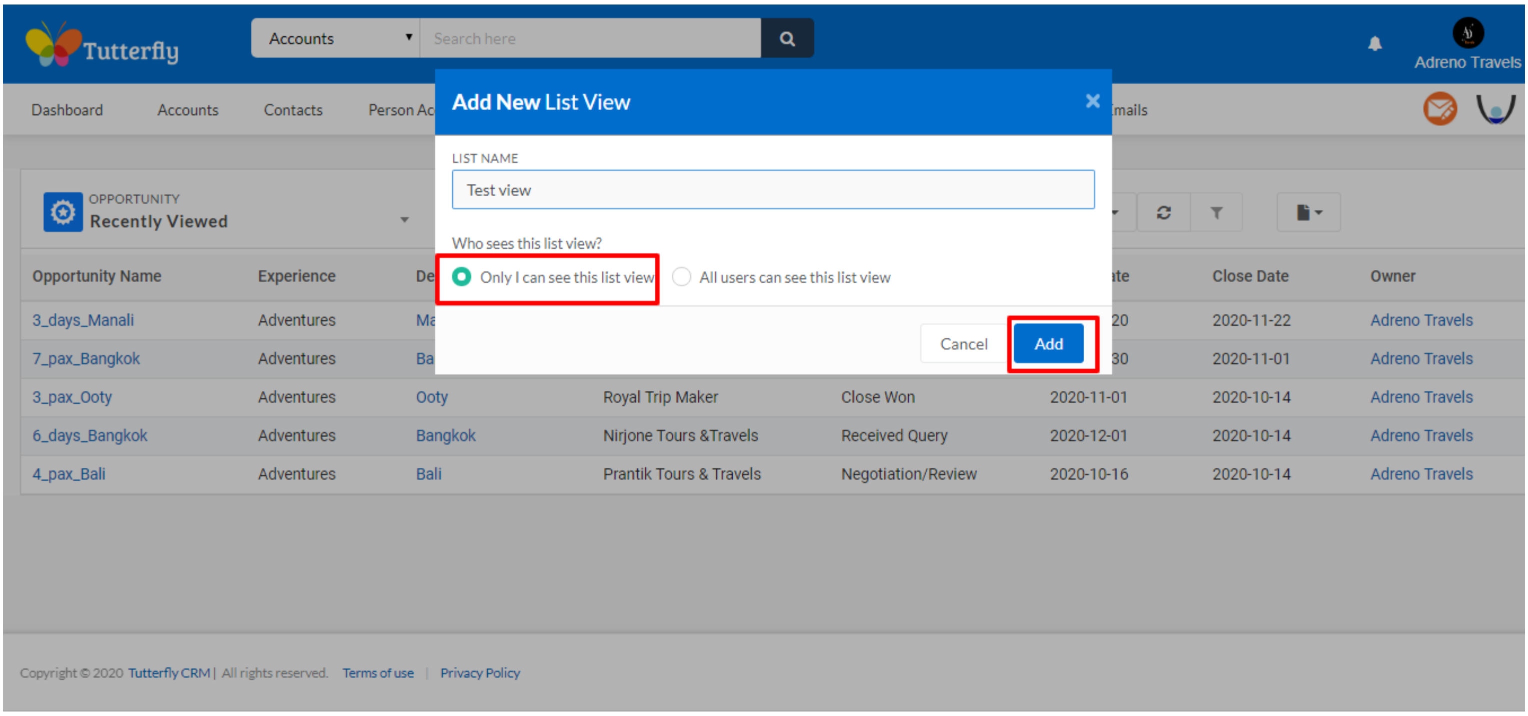
The List-Views are important to display customer-specific data according to your business. Follow the steps listed here to make working with Views faster.

Create a New View in Opportunity

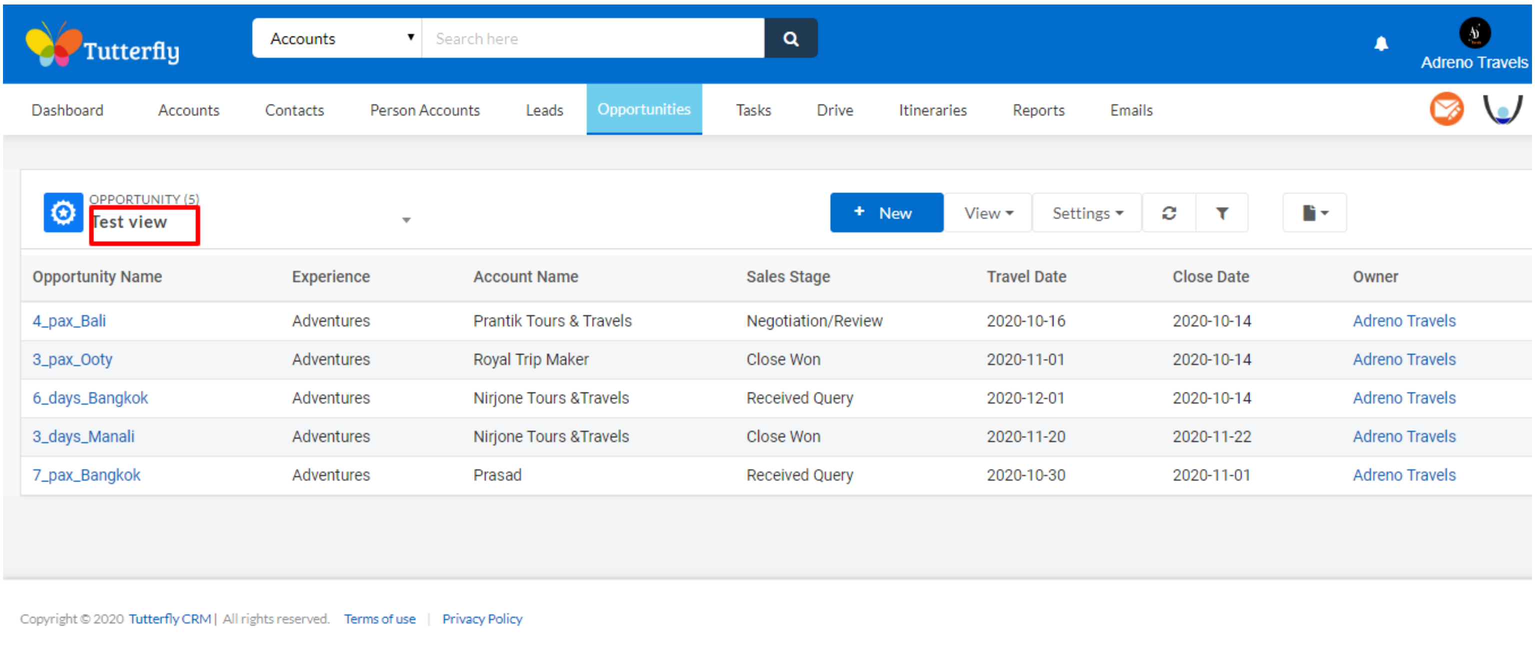
Step 1: Click on the **Settings >> New link.**



Step 2: This will display a window that will look like the image below:

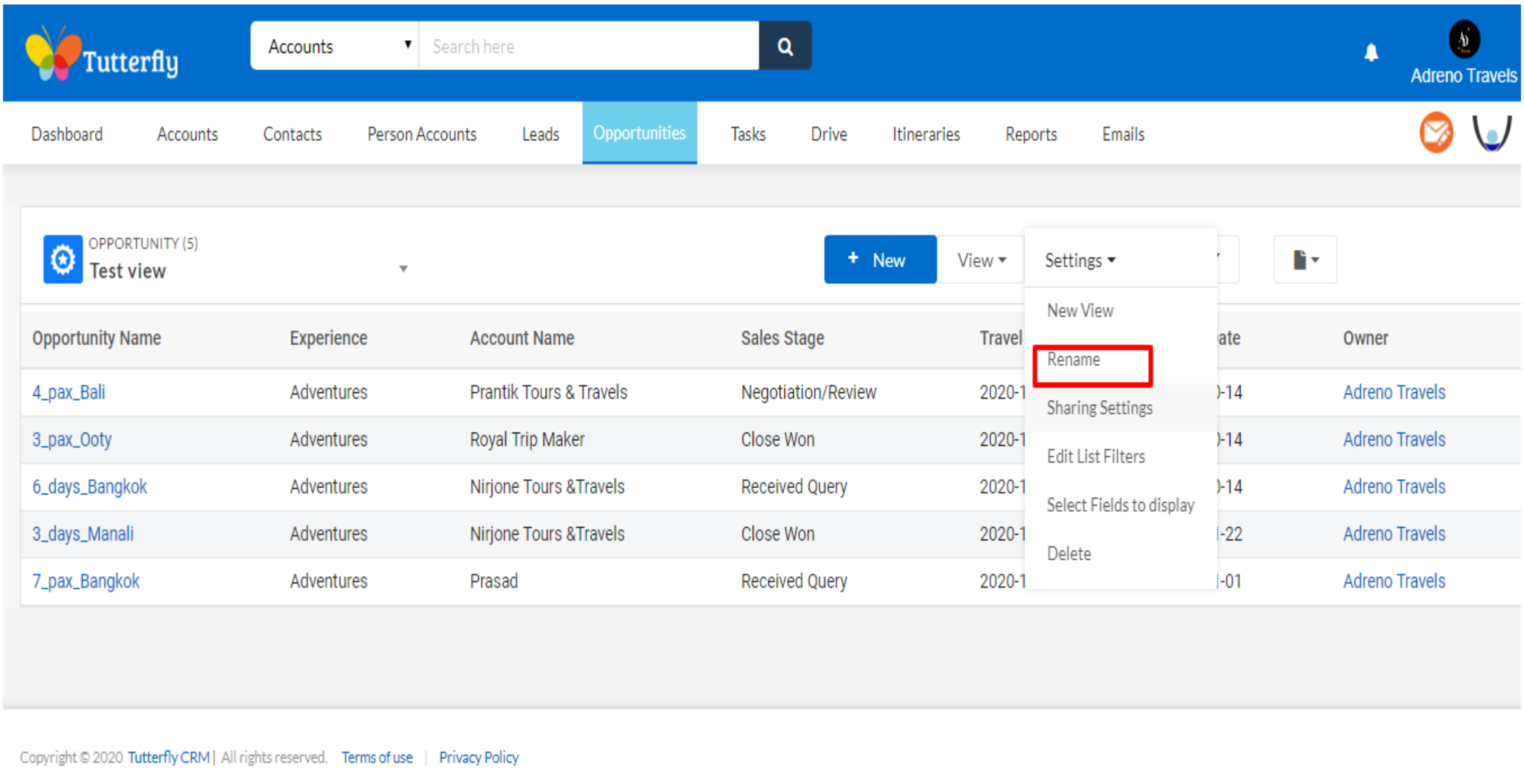


Step 3: Click on the **'Add'** button. The new view will just appear at the place of recent view to the list of views displayed in the top-left corner, just like the image below:

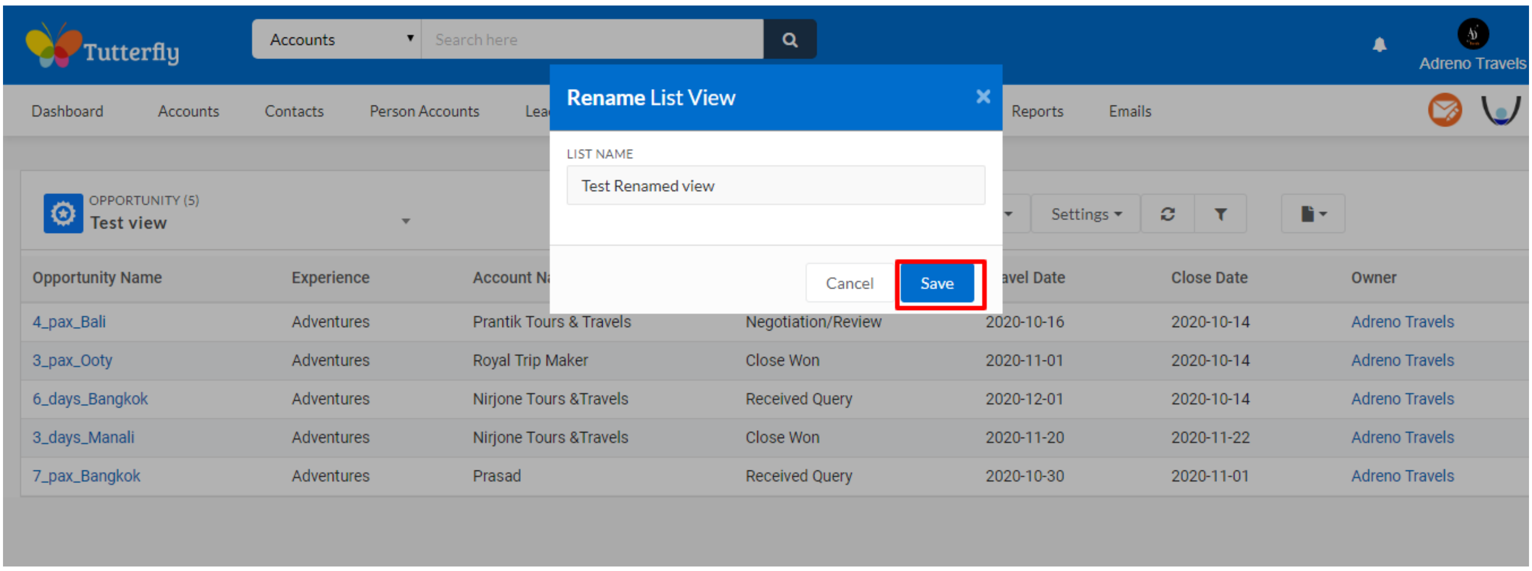


• Rename the List View

Step 1: Go to Settings >> Rename View.

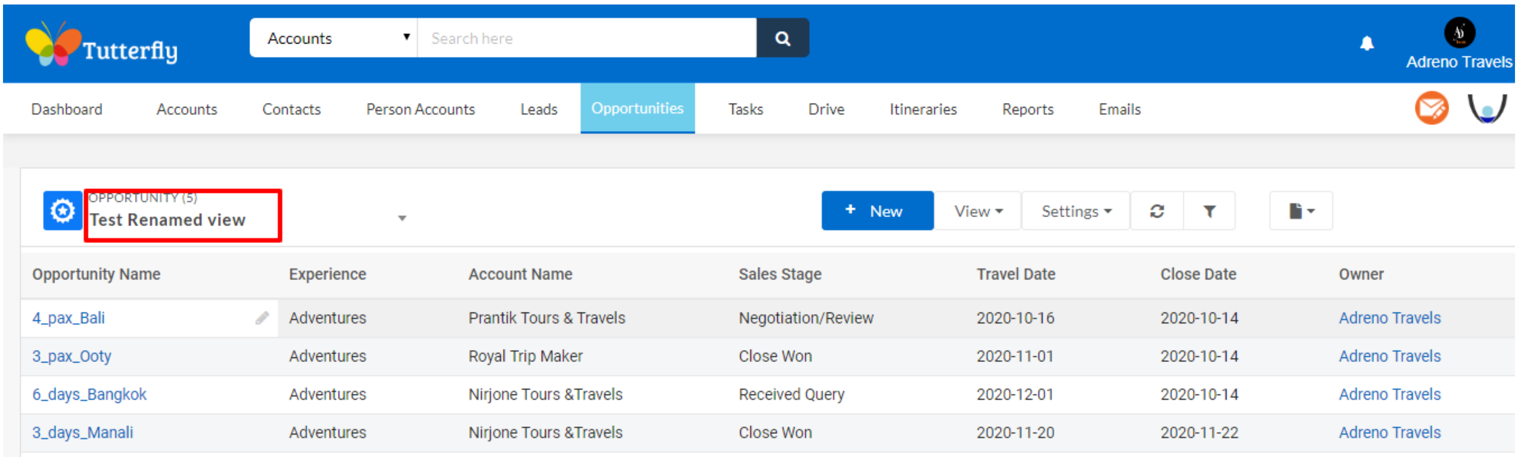


Step 2: From the **'Rename List View'**, retype the **'List Name'** and click on **'Save'** button.



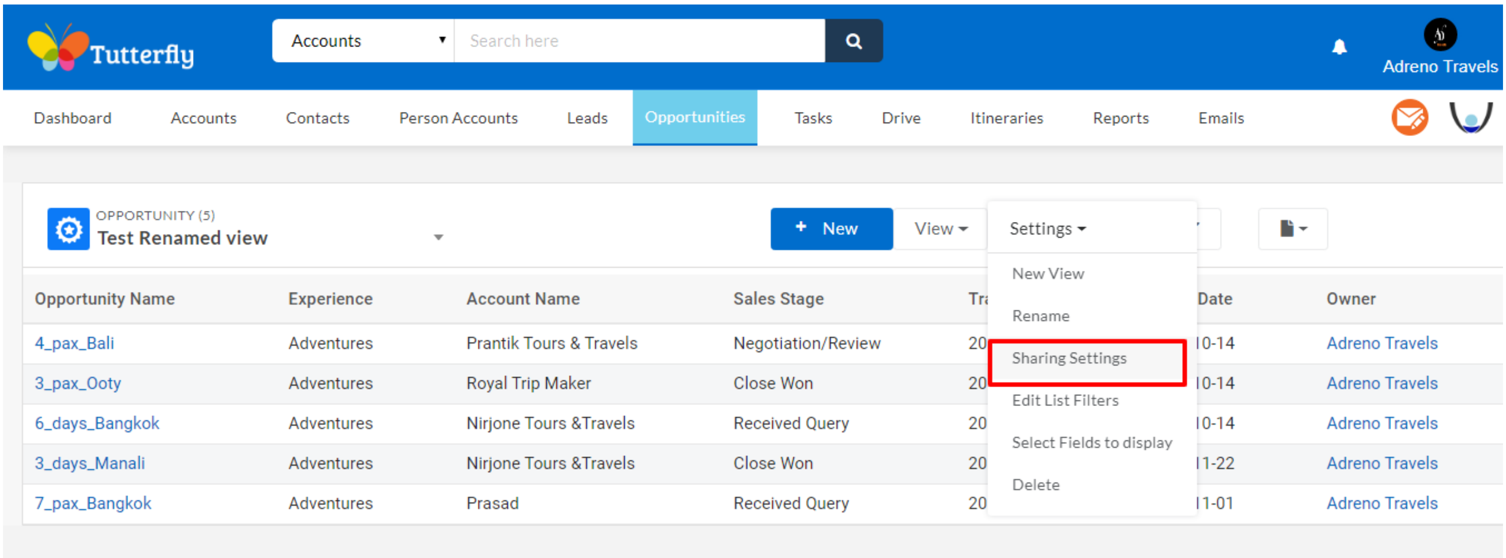
Now you can see the renamed view in top – right corner

Change the Sharing Setting



In TutterflyCRM, a user can control access to some parts of the data by using share settings. Follow the below-listed steps to manage your sharing settings.

Step 1: Go to Settings >> Sharing Settings. A box will appear like the one shown in this image below:



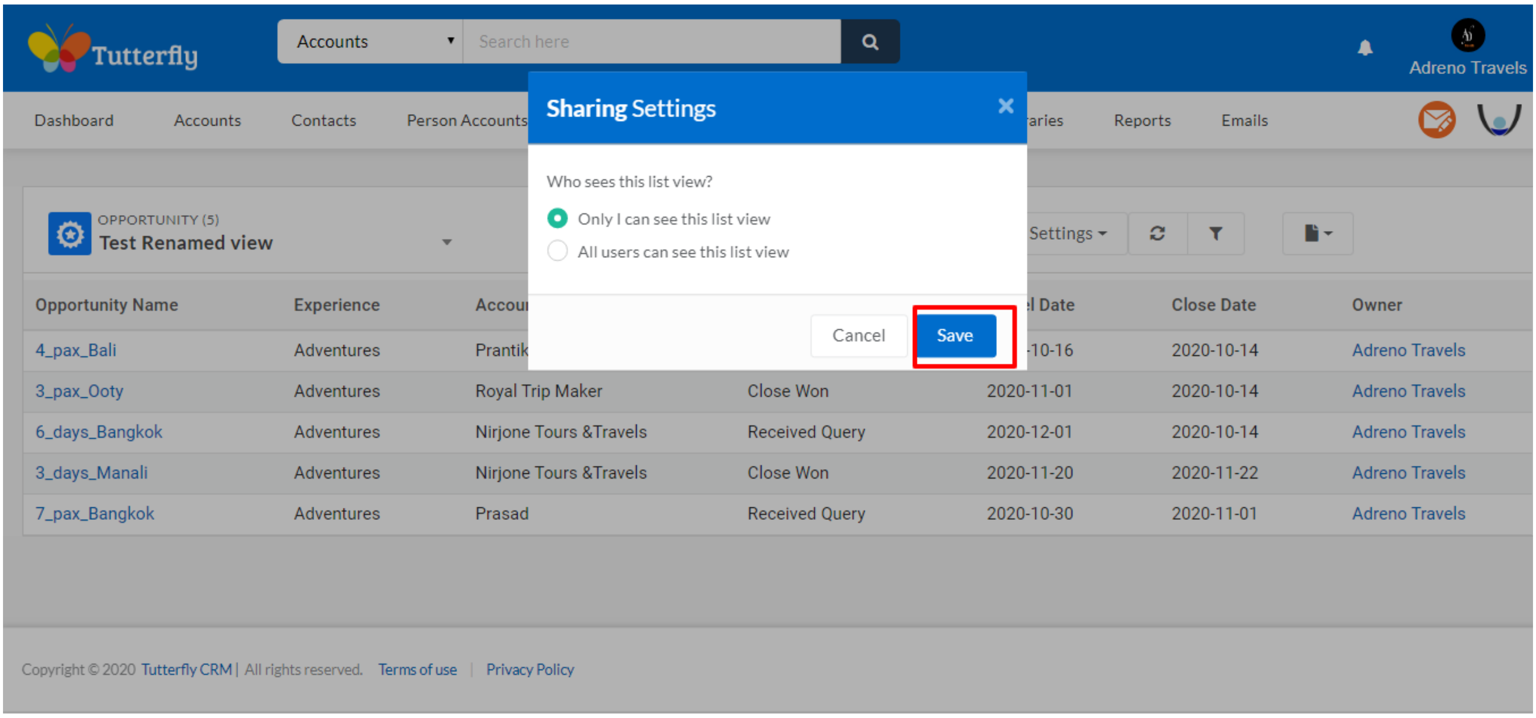
Step 2: From the '**Sharing Settings'** box, select the options to set the access level for the View.

Only I can see this List View: This View can be accessed by only the user who created it.

All users can see this List View: This can be accessed by all the users in that particular domain instance.

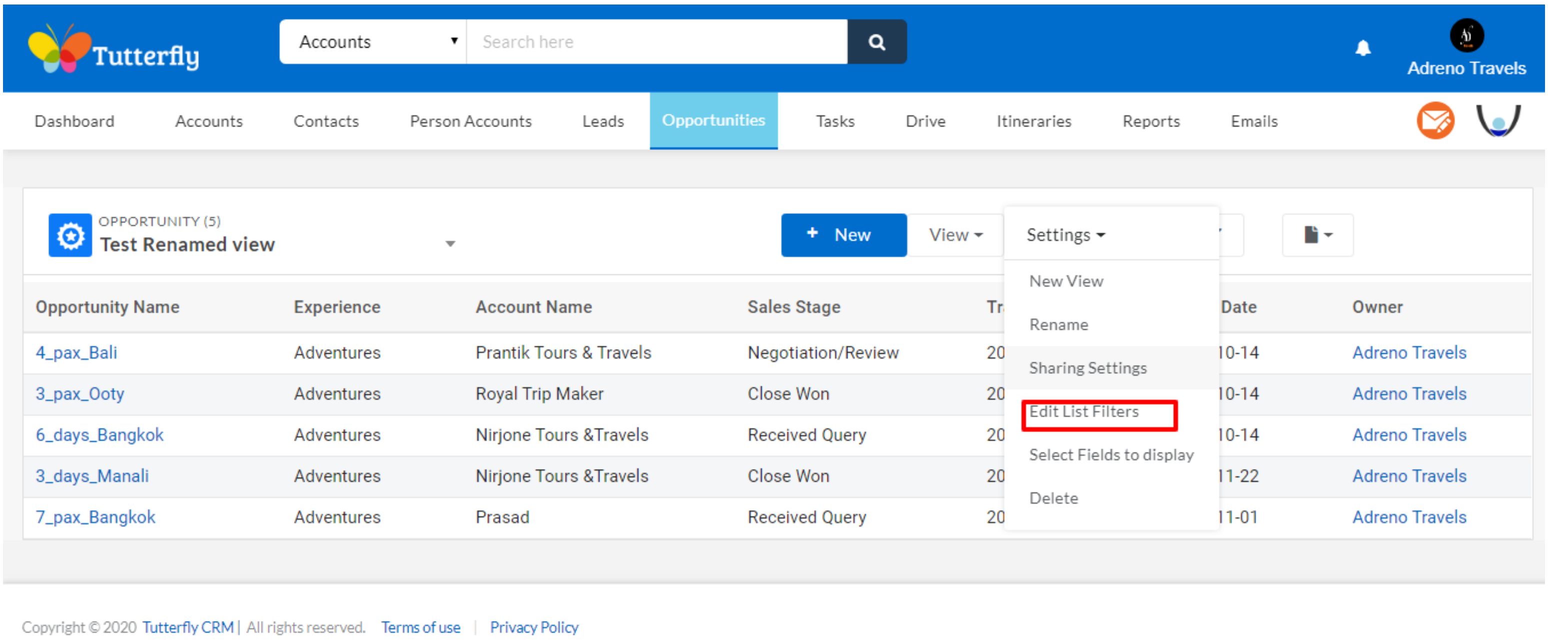
Note: By default first one will be selected.

Step 3: Then, click on the ‘Save’ button.

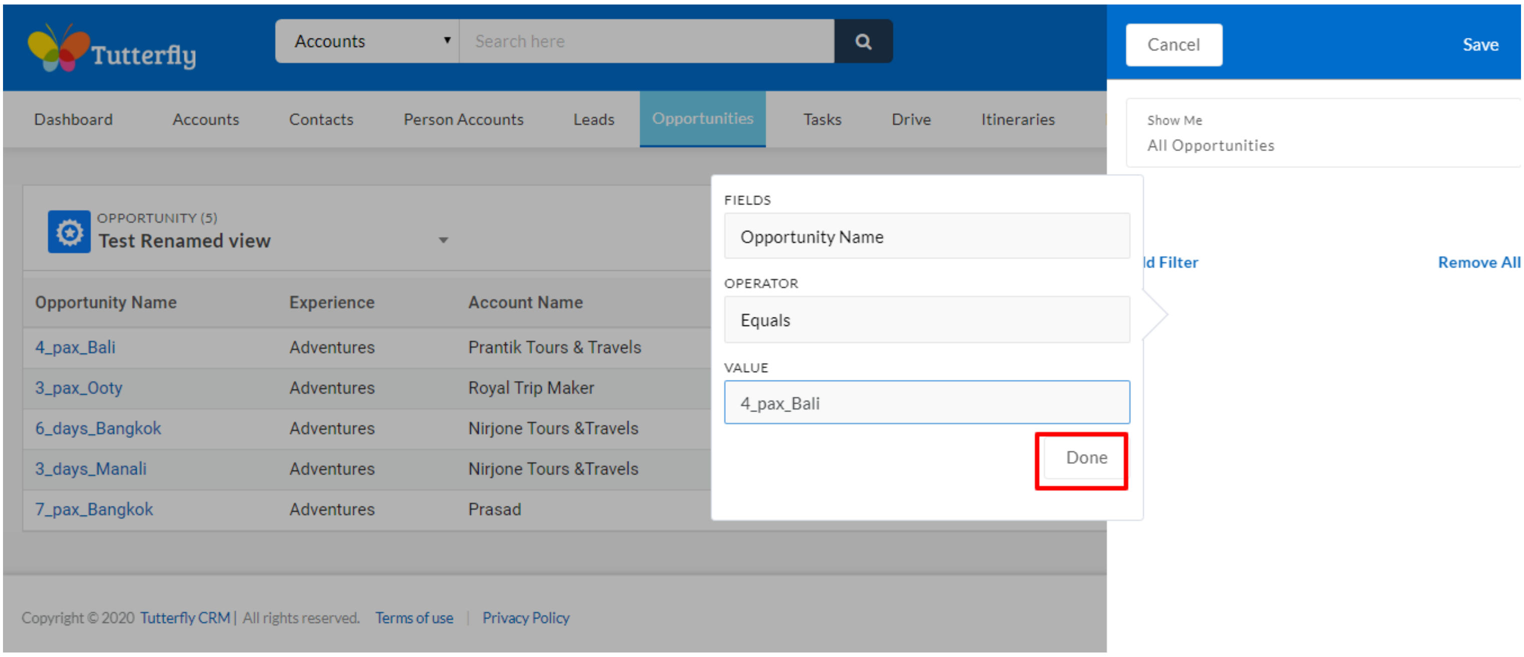


Edit List Filters

Step 1: Go to ‘Settings’ and click on ‘Edit List Filters’.



Step 2: A pop-up will appear on the right side. Just like the one shown in the window below.

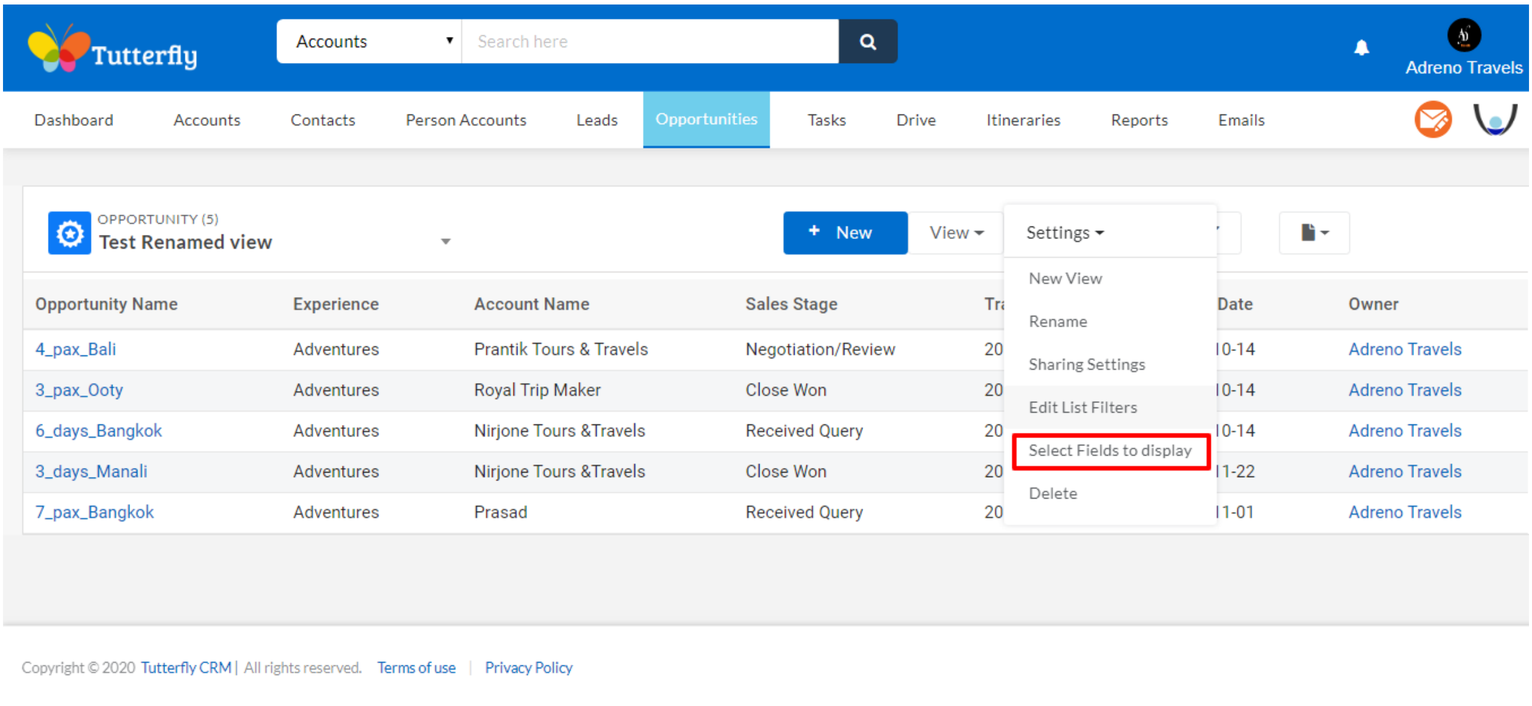


Click on **'Add Filter'** and fill in details such as a field, operator, and value. Next, click on the 'Done' button.

Step 4: Click the 'Save' button to save the changes made.

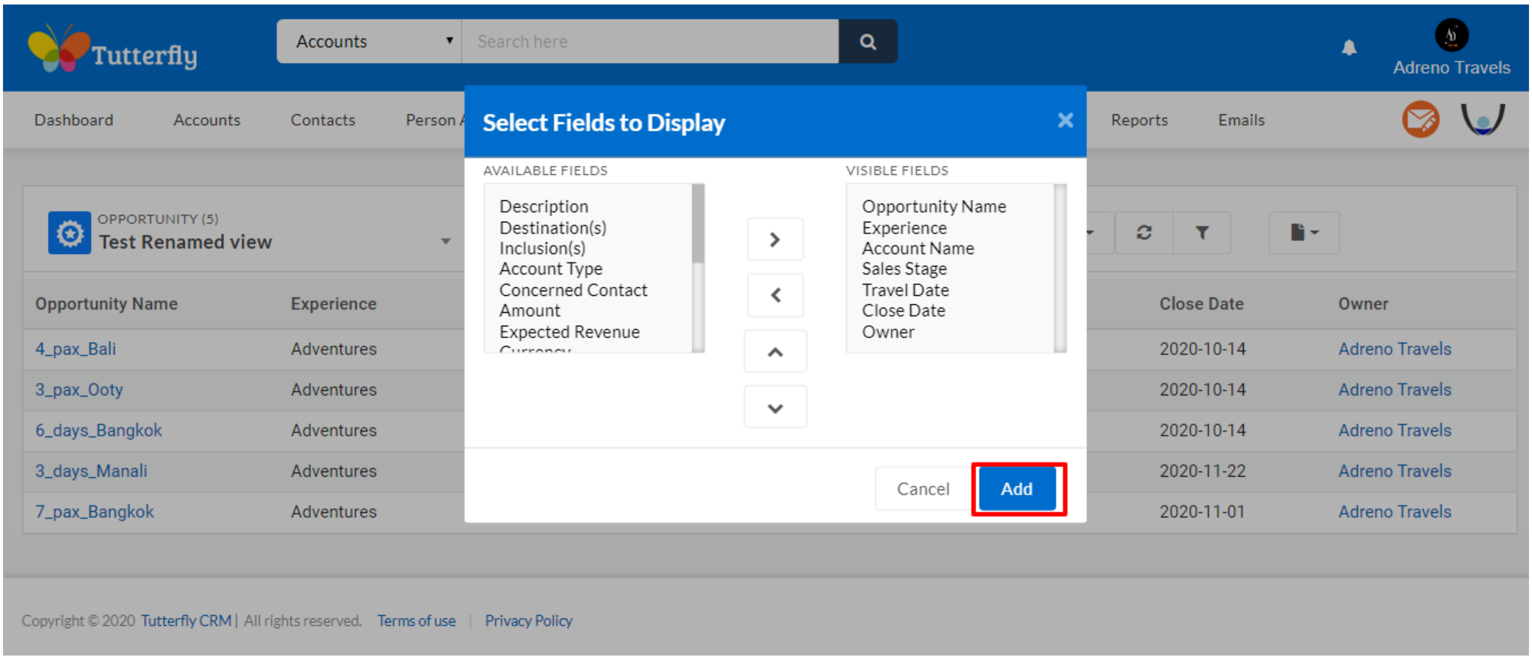
Select Fields to Display

Step 1: Click on Settings >> Select Fields to Display.



Step 2: From the **'Select Field to Display'** box, a user can add or remove fields which he wants to display.

Step 3: There are two sections: **'Available fields'** and **'Visible fields'**. **'Available fields'** indicates all the fields of an Opportunity record. The **'Visible fields'** indicates the fields which we are going to include in a particular View. To add an item, select column names and click on **'>'** symbol to shift the field in visible field section. To remove an item from visible fields, click on the **'<'** icon.

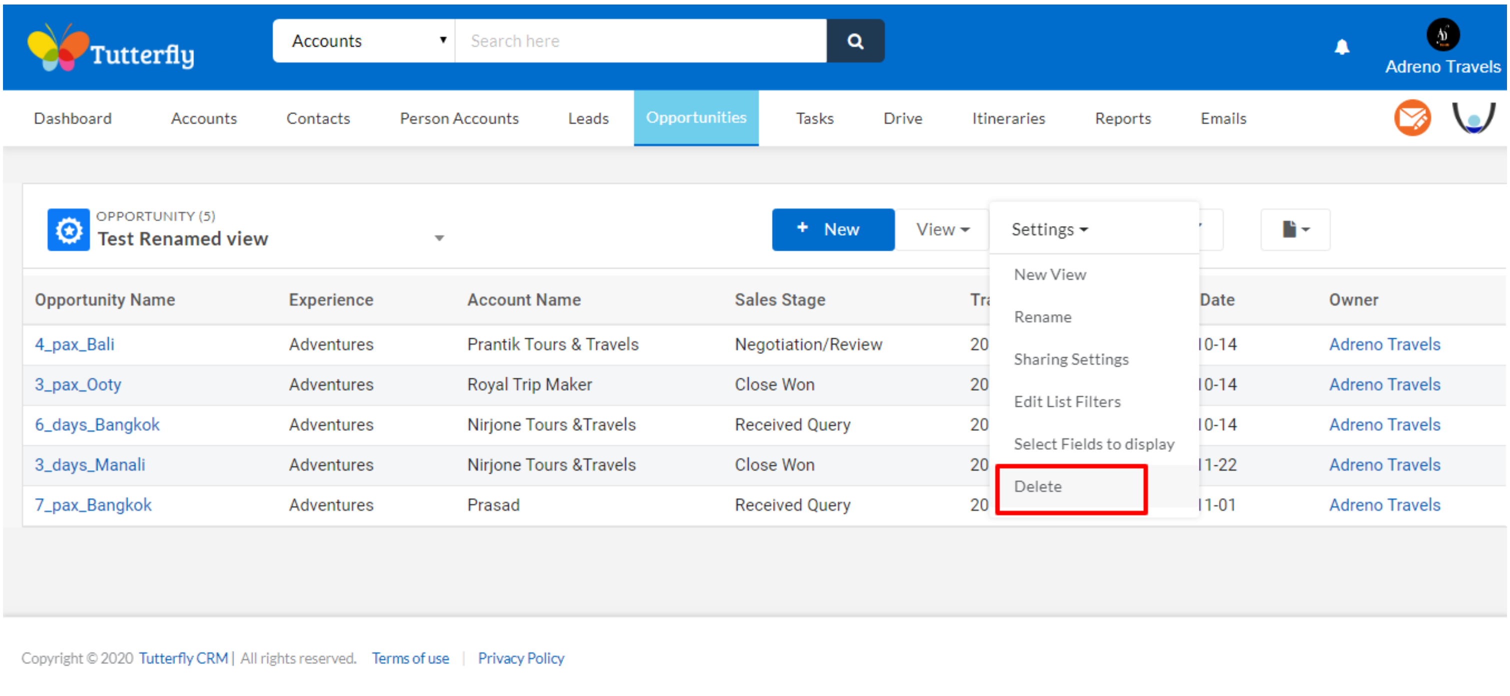


Step 4: Great! We are almost at the end. The up and down arrows are there to arrange the position of each column in a View.

Step 5: Awesome! Click on the 'Add' button.

• Delete a view

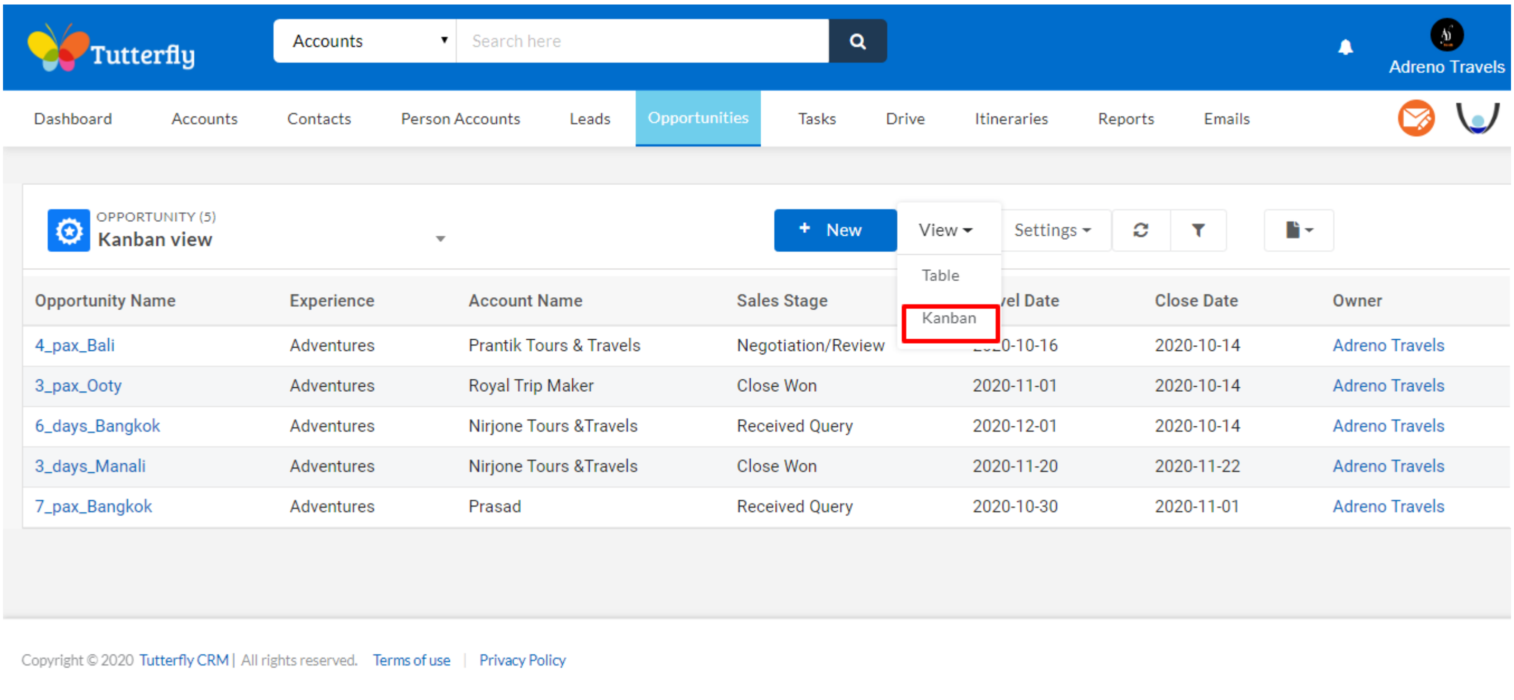
To delete a view select the delete option then confirm it. Your view will be successfully remove.



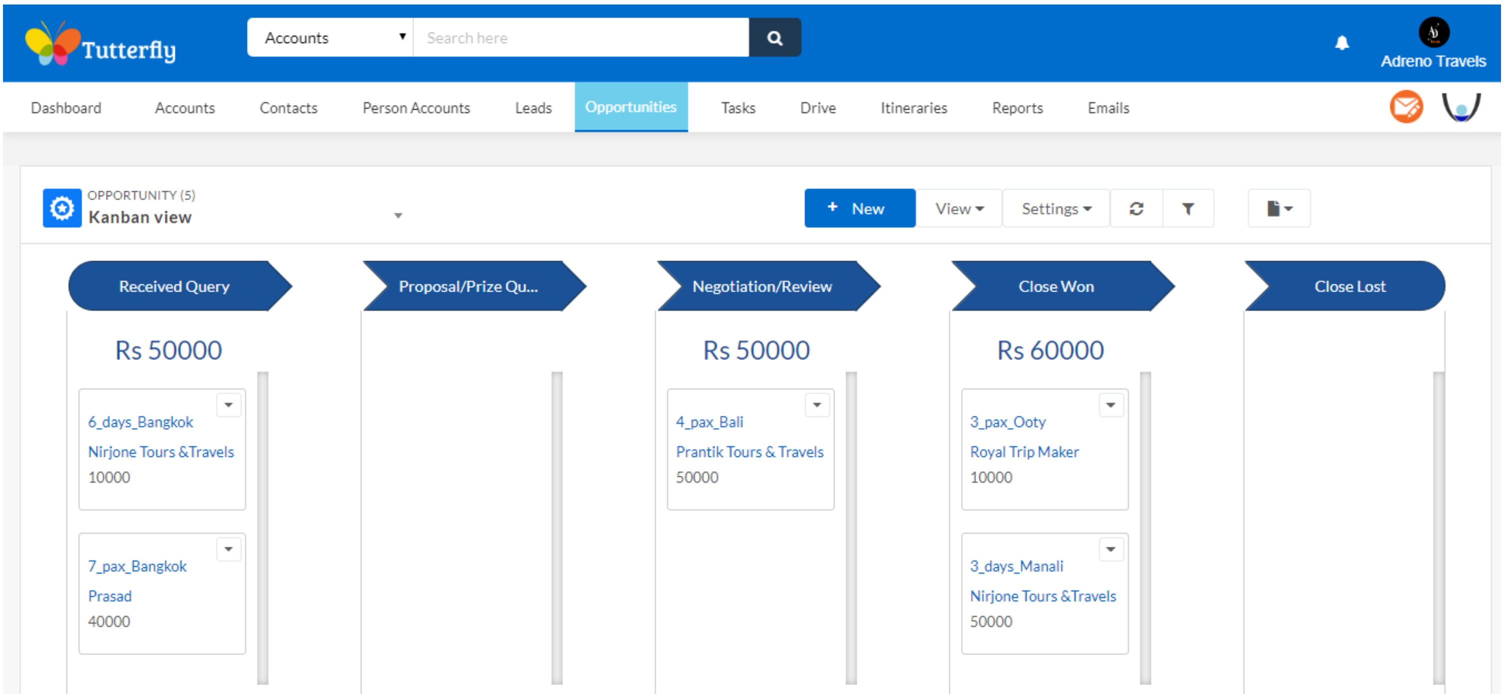
• Switch to Kanban View

This is a visual representation of opportunities that display data according to its related stages. A user can check the progress more effectively and monitor the work that has been done so far.

Step 1: Go to Views >> Kanban.



Step 2: The screen will shift to a pipeline view as shown in the image below:



Note: To work with a Kanban view you need to create your own view because it will not work within recent view.

How to Use the 'Activity' Section in the 'Opportunities'?

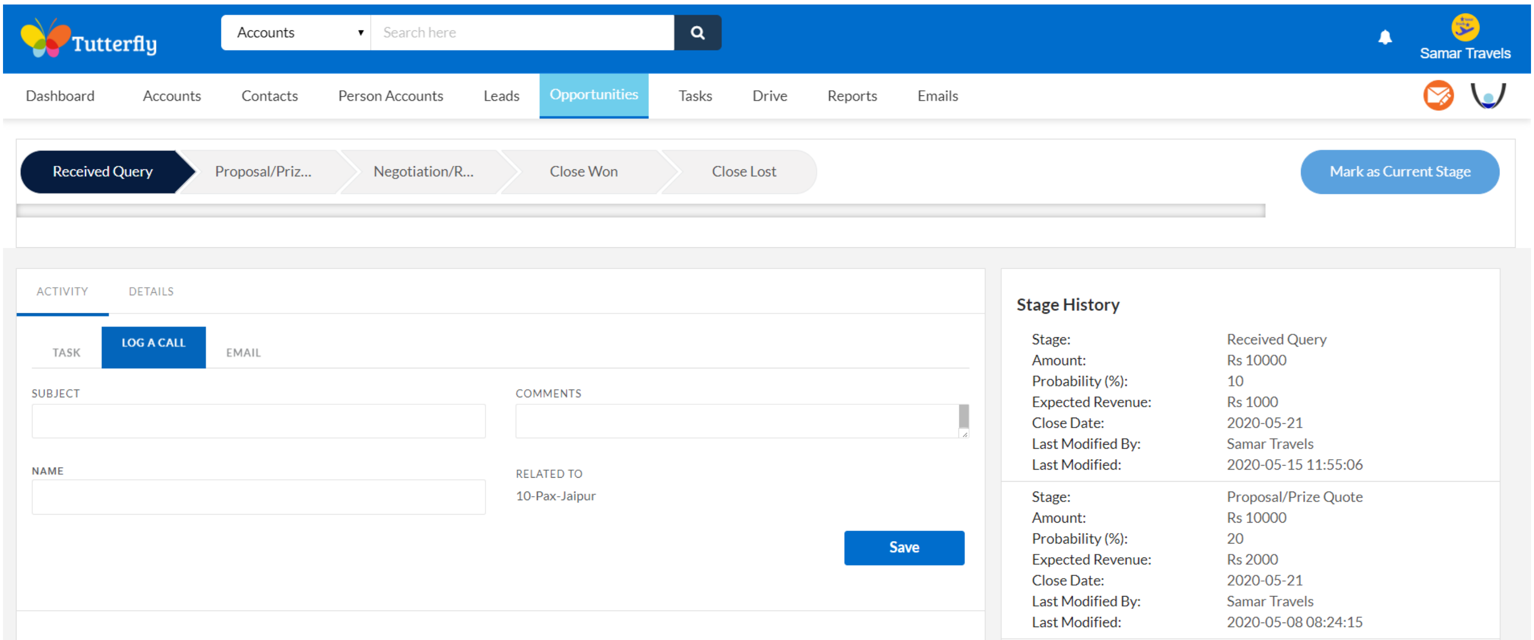
Opportunities in TutterflyCRM have an Activity Section. Here is a step-by-step guide to using emails, tasks and call logs through it:

Tasks

Task is an action that can be accomplished by the person to whom it is assigned. In the CRM, we can set a due date and time for a task. This acts as a reminder for the user so that they can manage it appropriately.

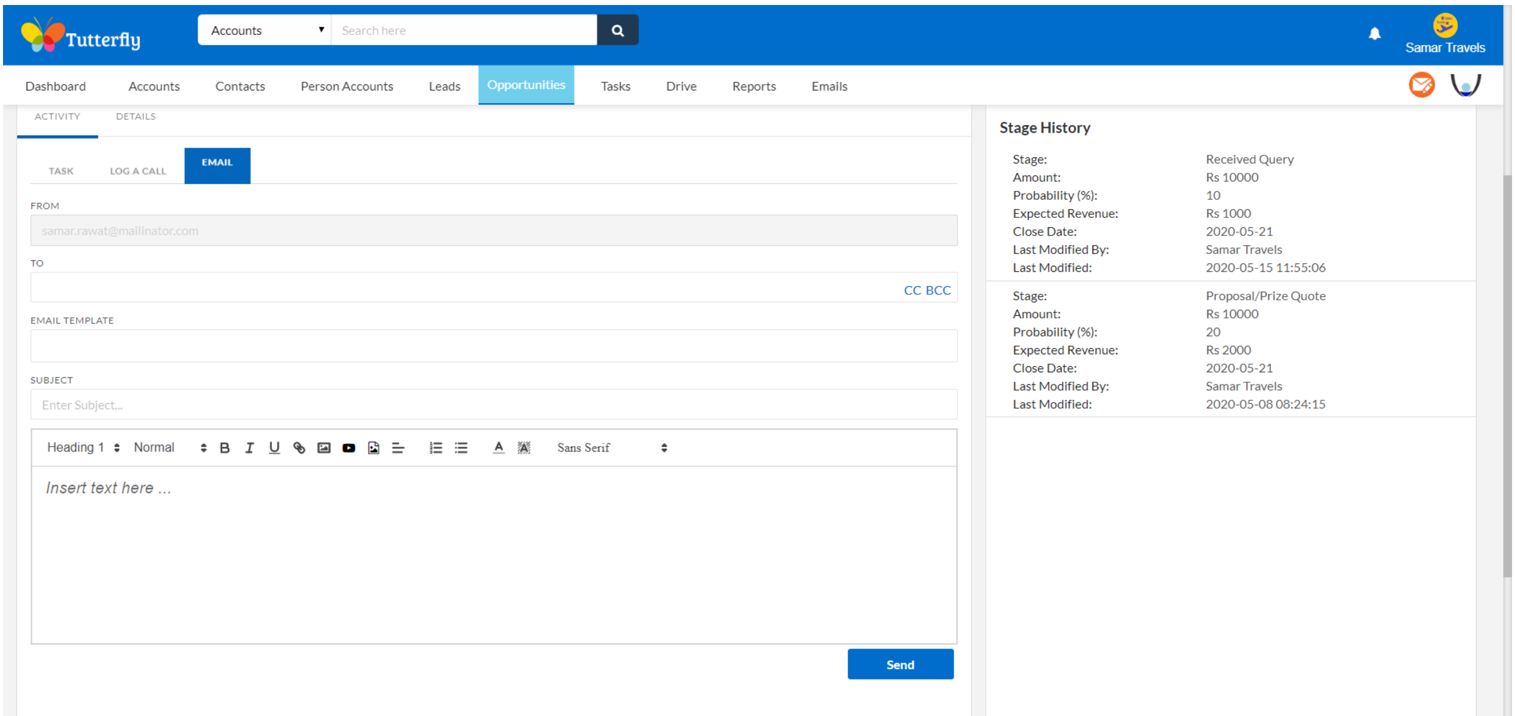
Call Logging

In the call logging section, we can store the details of the telephonic conversations for reference purpose.



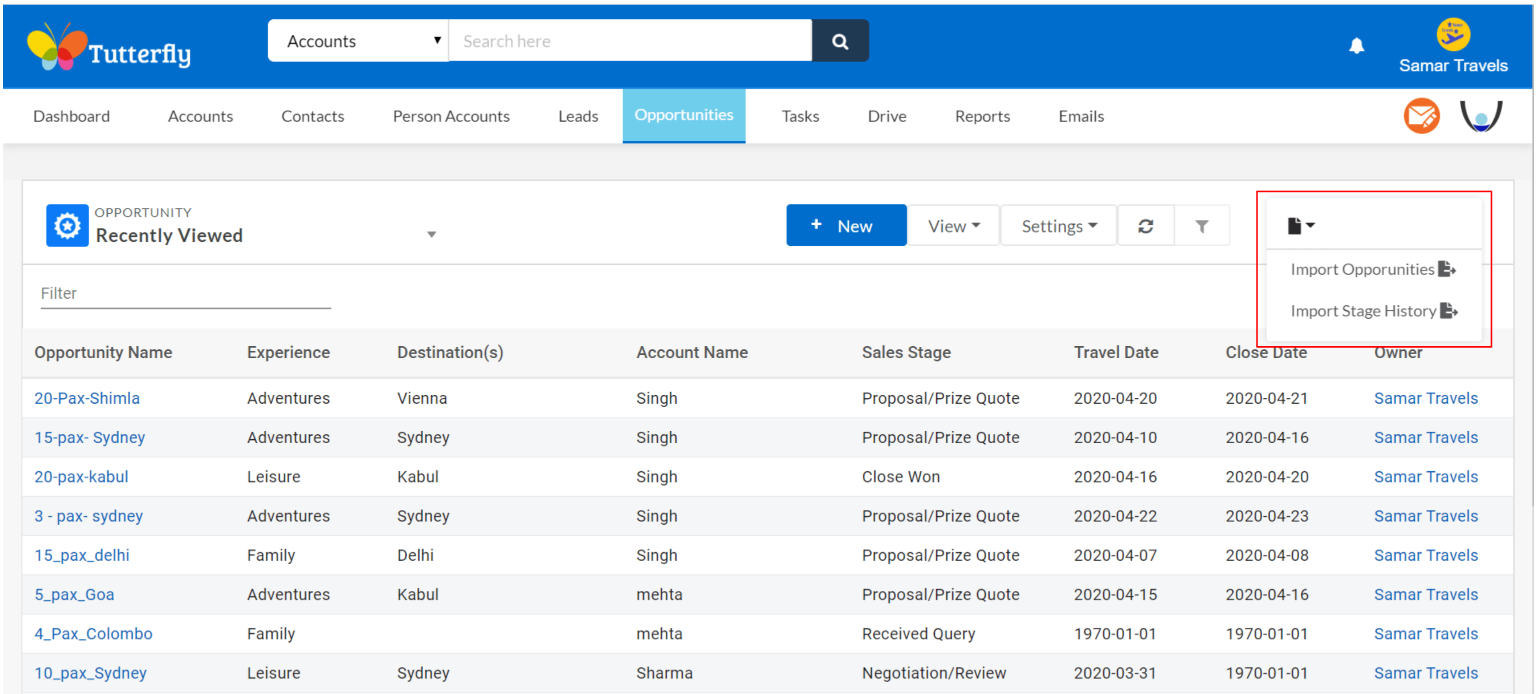
Email

Users can communicate and collaborate through emails in TutterflyCRM. While creating emails, a user can also choose different pre-generated templates.

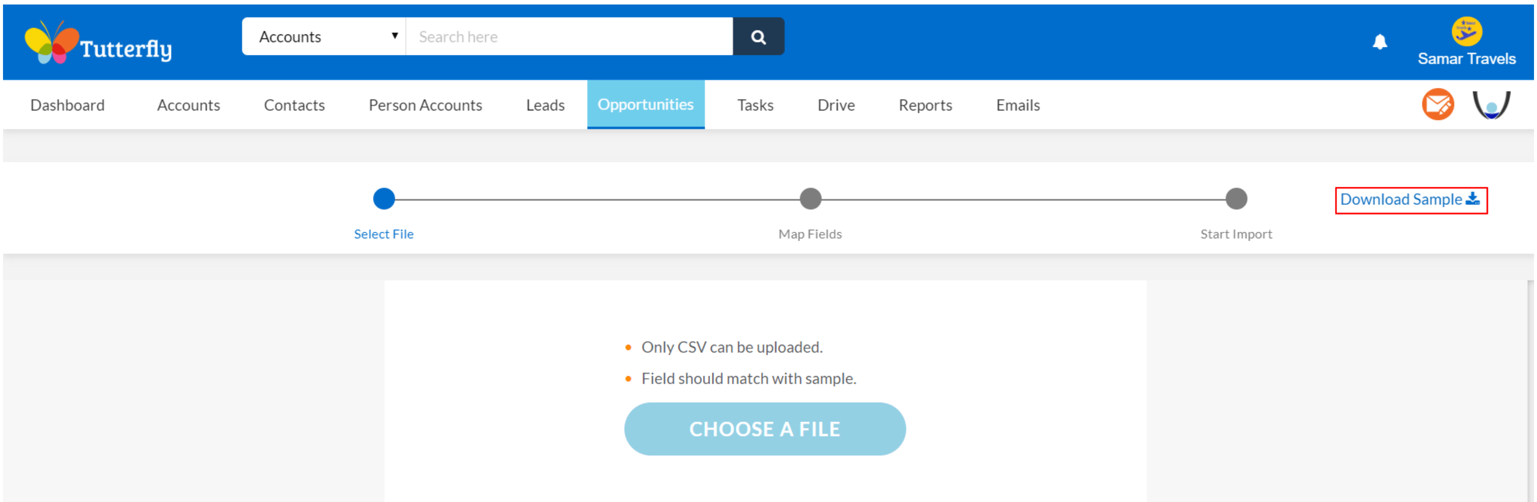


- **How to import an opportunity:-**

Step 1: Click on import button and download the sample. Save the data accordingly and convert your file into CSV.

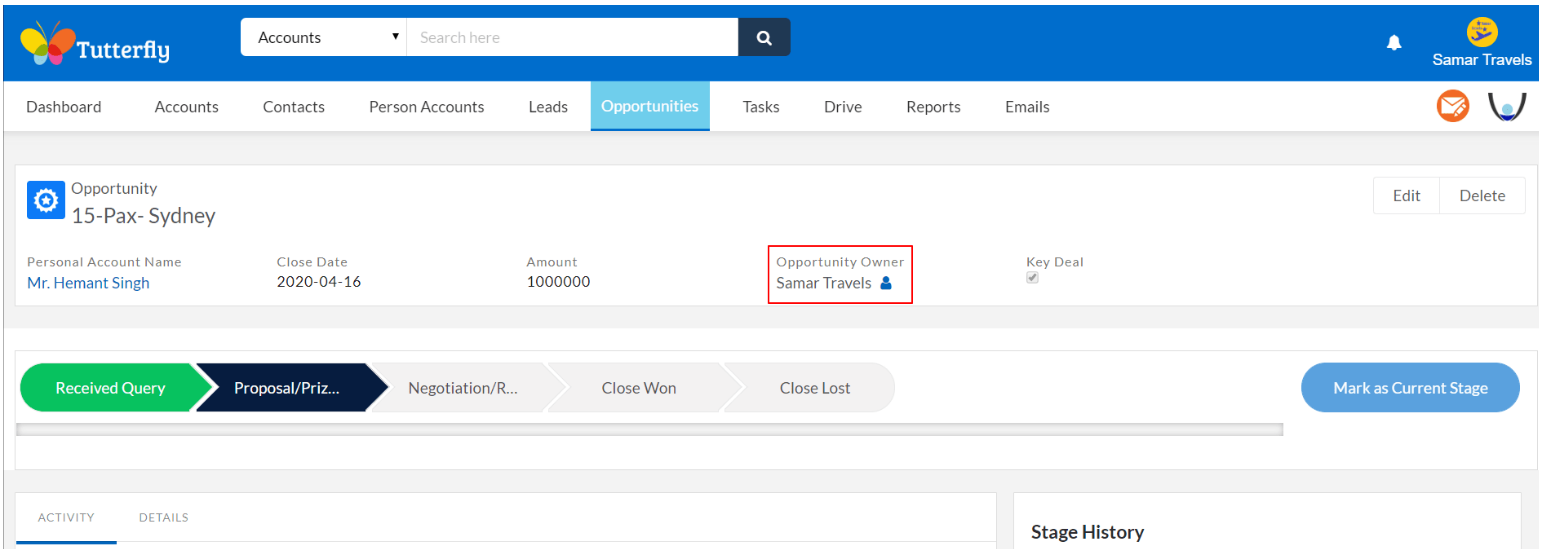


Step 2:- Choose the follow the instructions as mentioned in the Account Module:

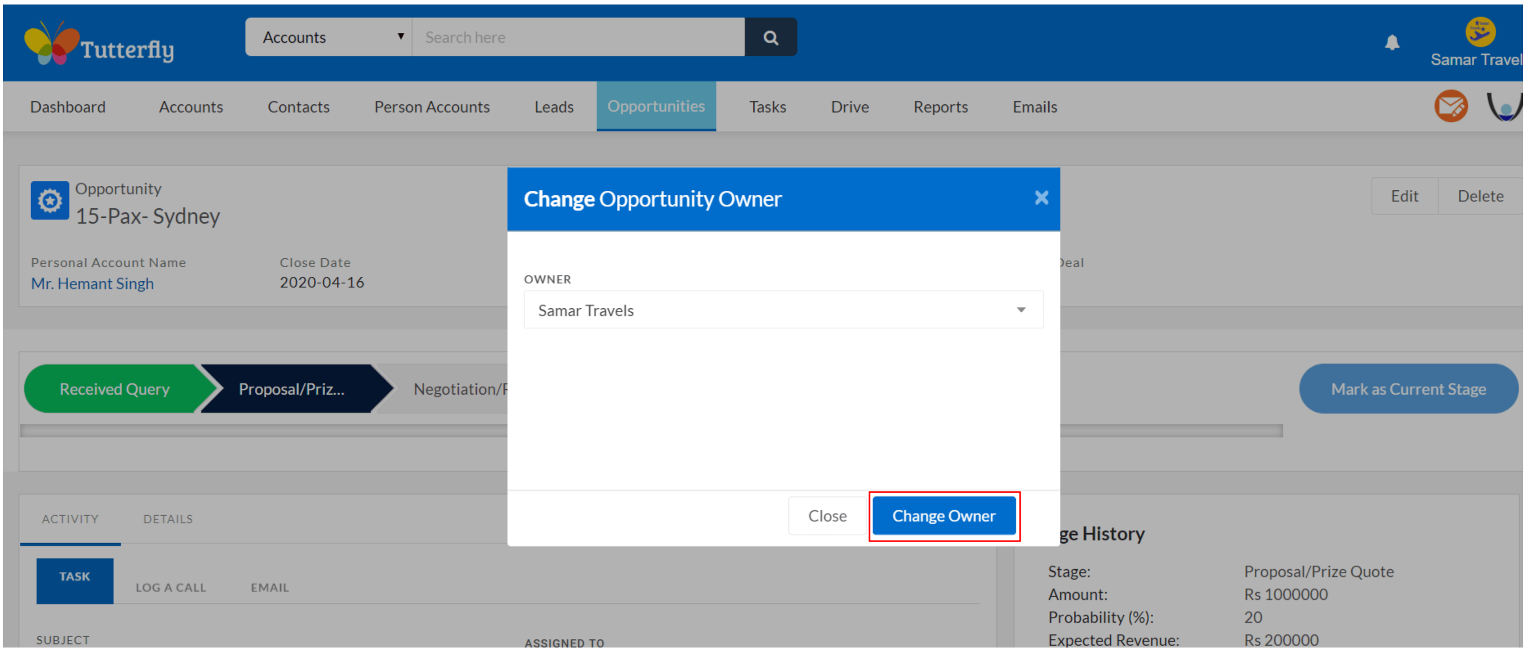


- ## How to change the ownership of the opportunity:

Step1:- Click on Ownership.



Step2:- Select the individual you want to assign the opportunity too.



Step3- Click on Change the owner.

New opportunity owner has been added.

• Reports:

TutterflyCRM can not just keep track of the sales, it also generates insights to help you sell smarter. The Reports are designed to help users to analyse data by adding filters and group by functionality. Keep reading to find out more.

What are Reports?

Reports are documents that enlist data in a tabular or graphical format for an account, contacts, person account, leads and opportunity. TutterflyCRM saves each report in a folder. These can be made shared, private or public. We can grant access to folders based on roles and permissions.

Reports

- Recent- It enlists all the recent Reports made by the user.
- Created by Me- It will show all the Reports created by the user.
- Public Reports- These are the Reports that are made public for all users to access. Any user can access these Reports.
- Private Reports- It will report all the private Reports of the user. Only the logged in user can access these Reports.
- All Reports- This contains all the Reports that are made public and those made by the user.

Folders

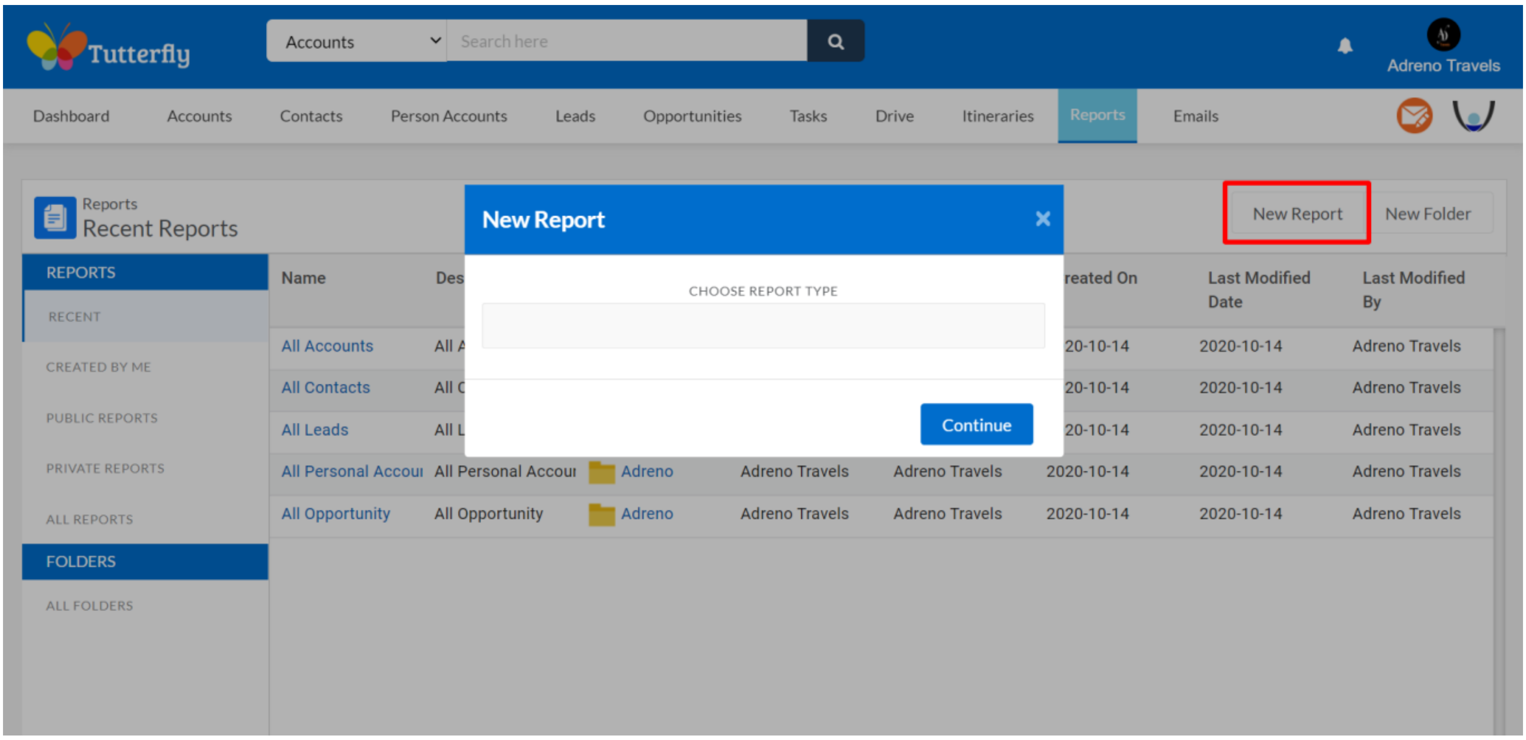
This is the last one! TutterflyCRM creates two folders automatically for each registration. They are public and private folders.

- All folders- This enlists all the folders created by any user.
- Created by me- This will show all the folders created by the user.
- Shared by Me- This represents all the folders shared with the user.

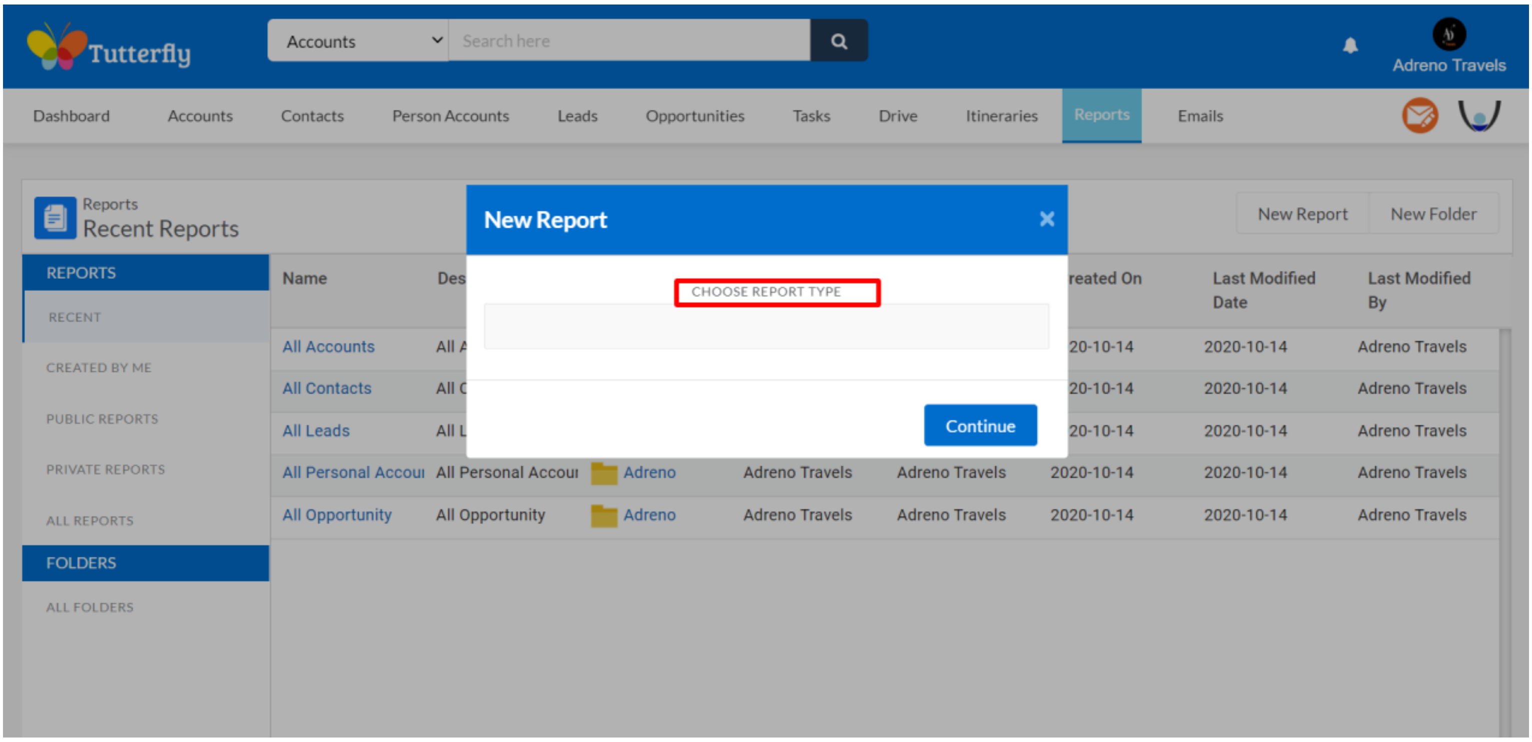
• Create a New Report

TutterflyCRM helps to improve sales and service by providing an option for report generation. Create monthly reports on accounts, leads, contacts and opportunities. Find out more from the following section.

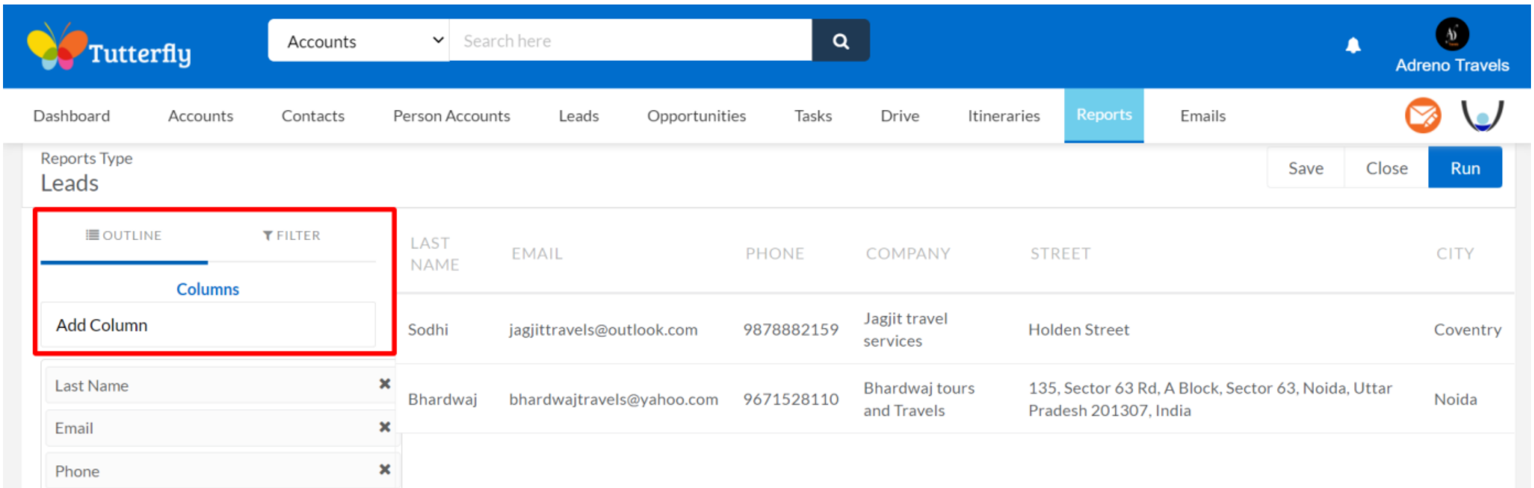
Step 1: Go to Reports >> **'New Report'** from the top-right corner.



Step 2: From the **'New Report'** box, select the module on which you want to create a Report. The **'Choose Report Type'** contains the listing of modules. Click on continue.

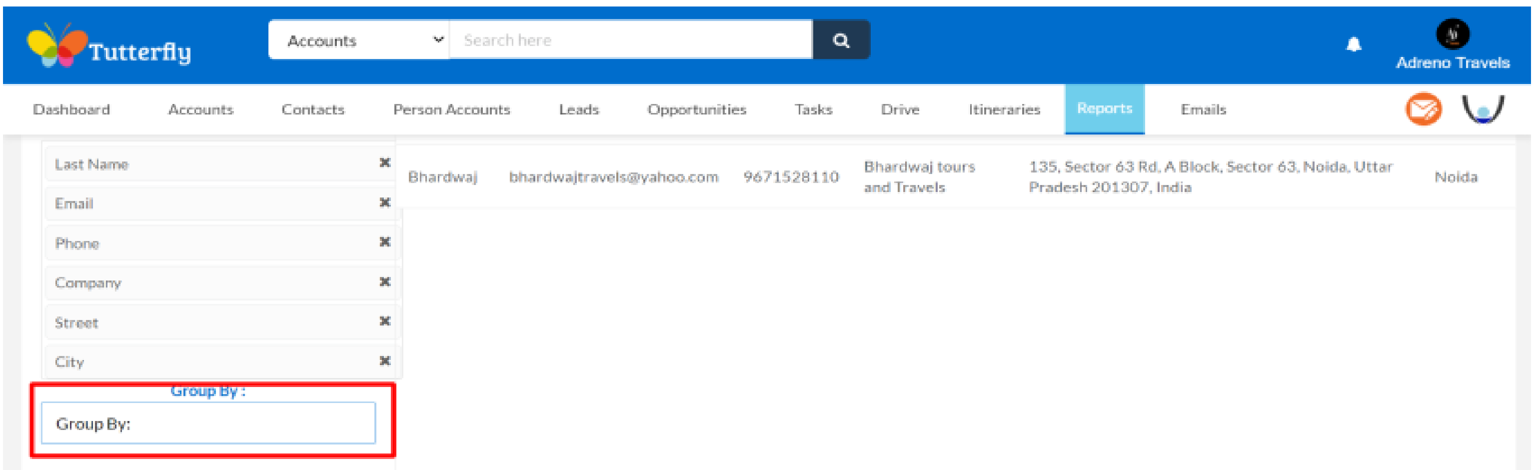


Step 3: A new window will appear containing a preview of a selected Report type like the image below:

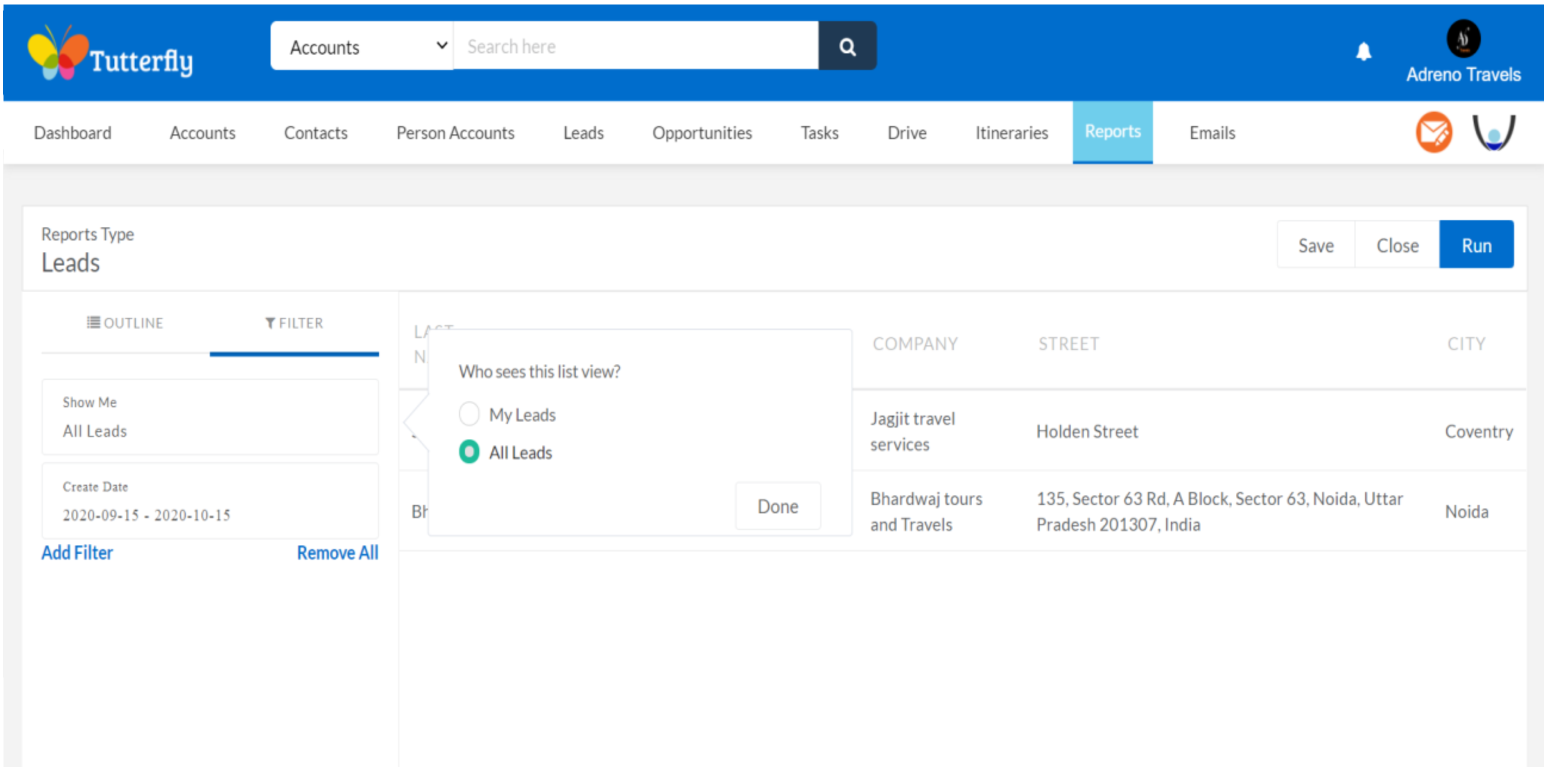


A sidebar will appear on the left side, which will contain two sections: 'Outline' and 'Filters' tabs. From the 'Outline' tab, select the column name(s) which you want to include in your Report.

Step 5: A user can also segregate data based on **'Group By'** fields.



Step 6: From the **'Filter'** tab, a user can enlist specific records.



My Opportunities: Filter can be chosen to view records made by the user. You can use it to self-test progress so far.

All Opportunities: This option will enlist all the records in the system.

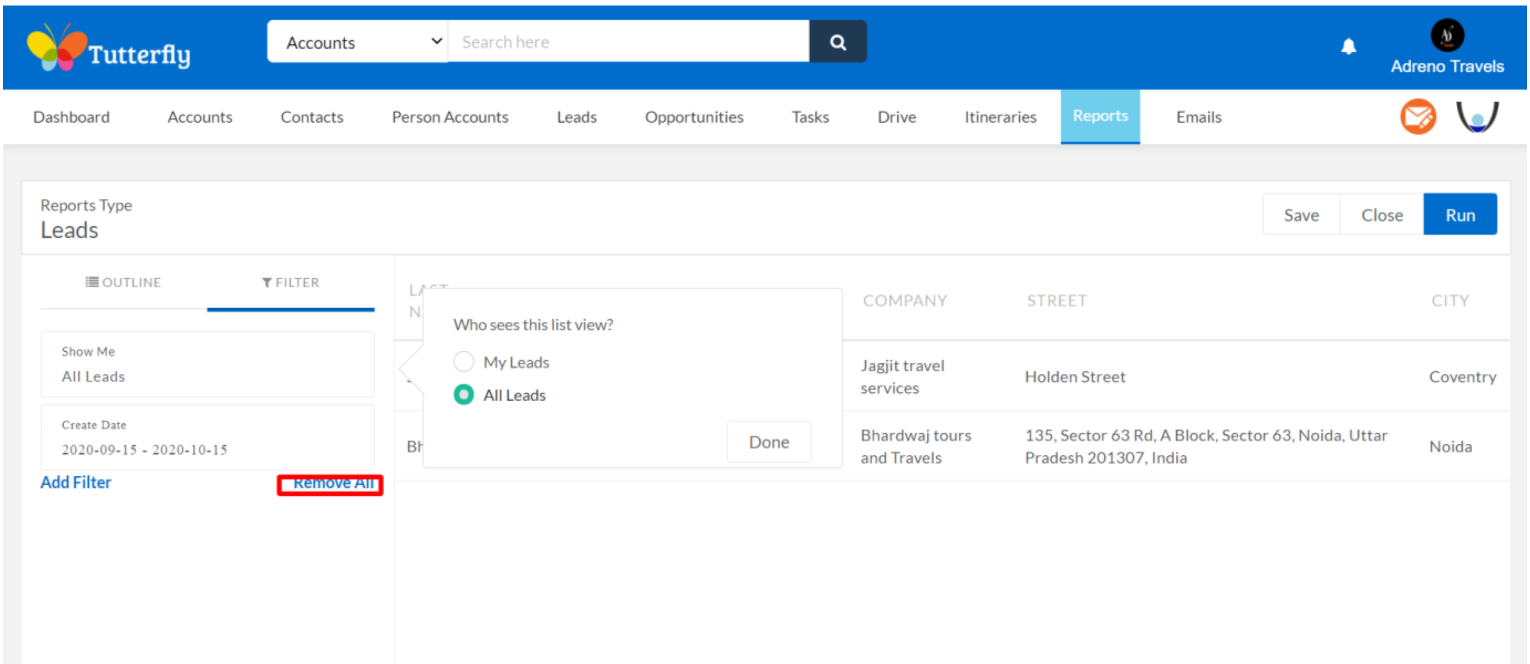
Step 7: A user can set parameters for the time period when the records were created.

Select Date Fields: TutterflyCRM provides options to choose between **'Create date'**, **'Last Modified Date'** for Accounts, Contacts, Opportunities, Leads and Person Account. **'Opportunity'** also contains **'Close Date'**, and **'Date of Travel'** options.

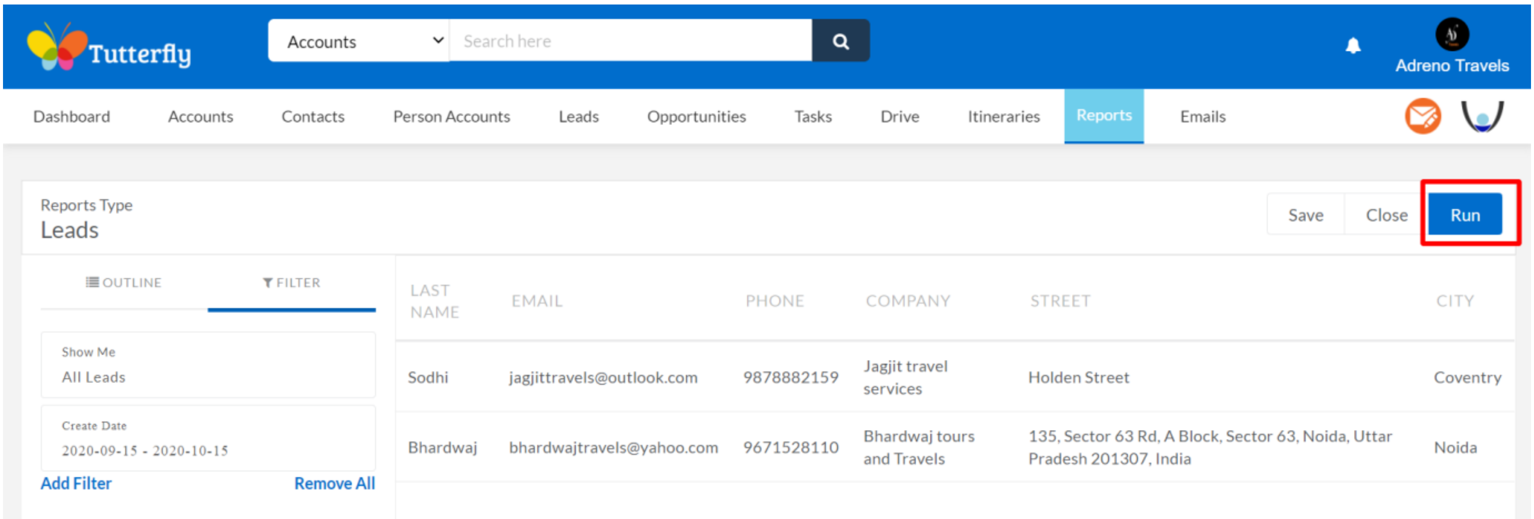
Start Date: While we are setting the date range to generate the Report, the start date will define the initial date from which the Report will get generated.

End Date: This is the last day which will reflect the time period in which the records need to be fetched.

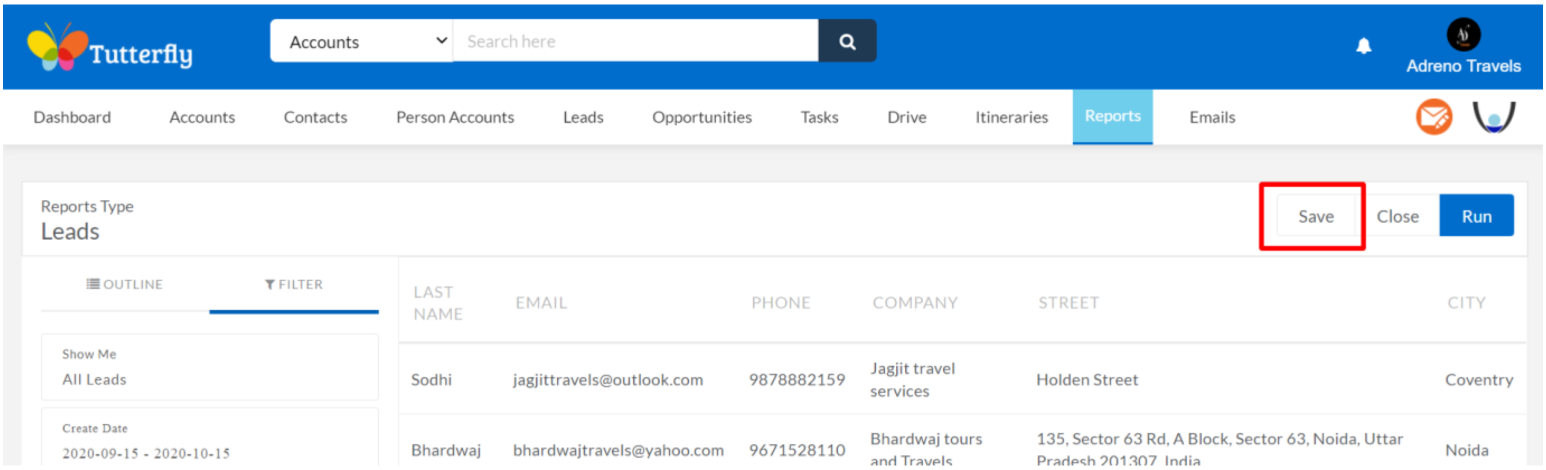
Step 7(a): To remove filters on a Report, click on the **'Remove All'** link to remove a filter that was previously applied.



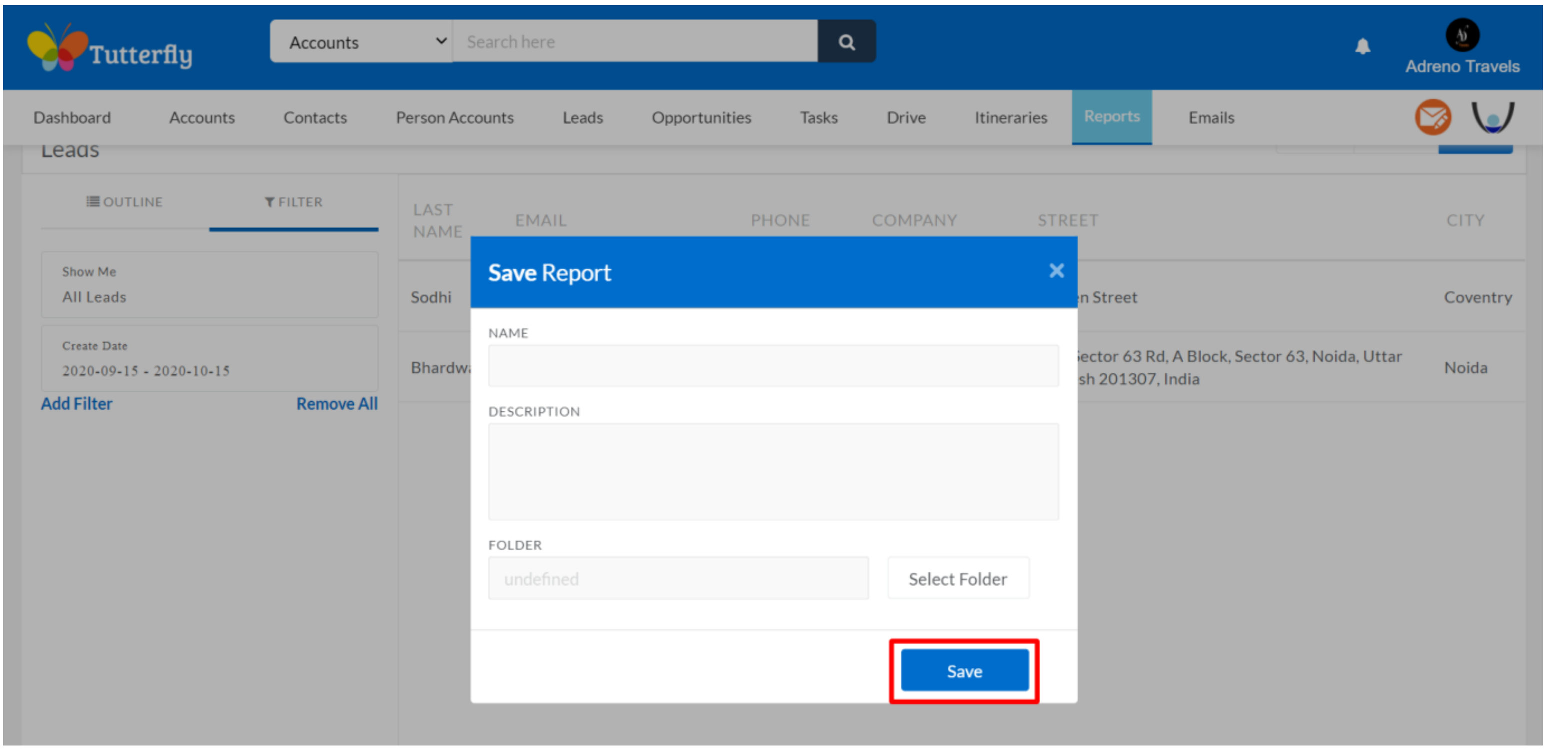
Step 8: Click on the **'Run'** button that provides you with the preview of debugged Report.



Step 9: Great! We are almost at the end. Now, click on the Save button.



Step 10: At last! Enter the name, description and select the folder.

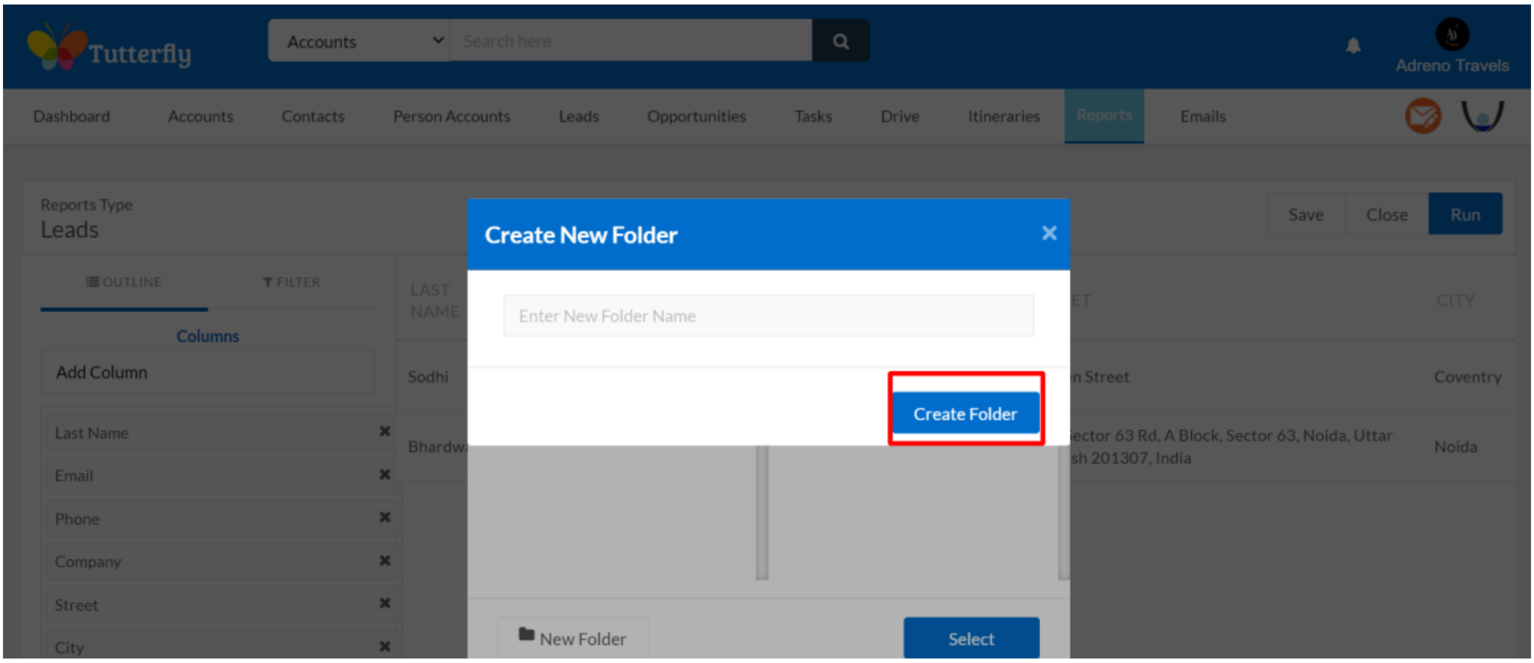


Finally! your report is created and saved in the folder of your choice.

• Create a New Folder

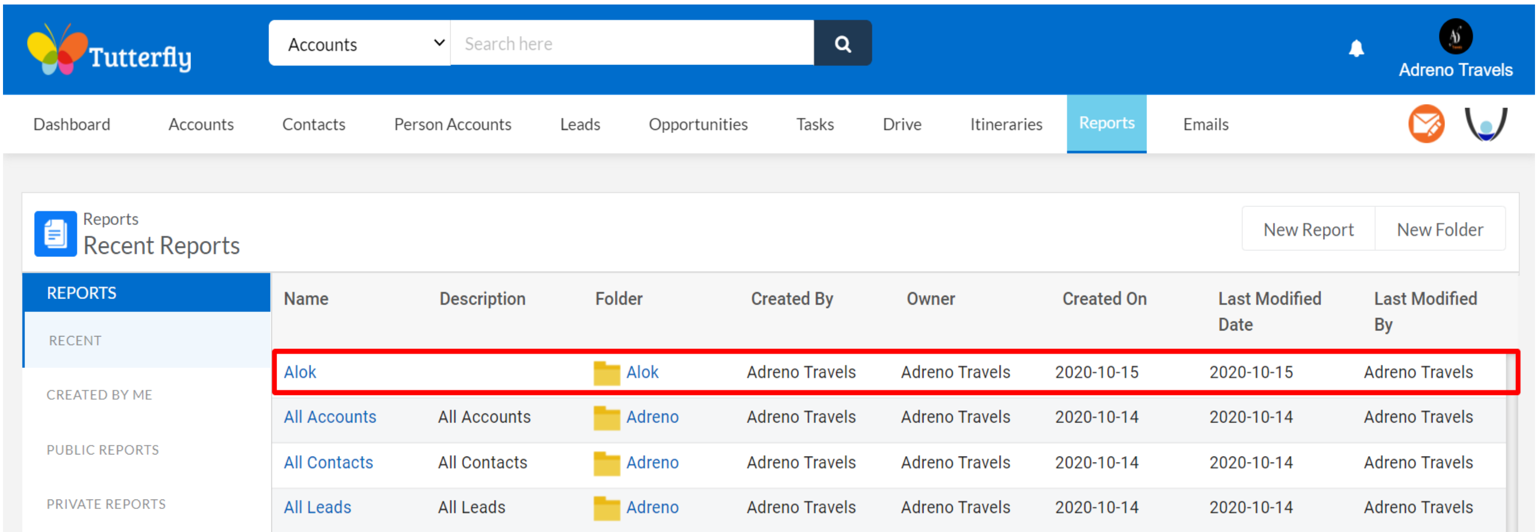
TutterflyCRM provides steps to create a folder to store Reports. All businesses must use it to improve performance and simplify the process of managing Reports.

Step 1: Click on the ‘New Folder’ button.



Step 2: From the **‘Create New Folder’** box, type-in the folder’s name and click on **‘Create Folder’** button.

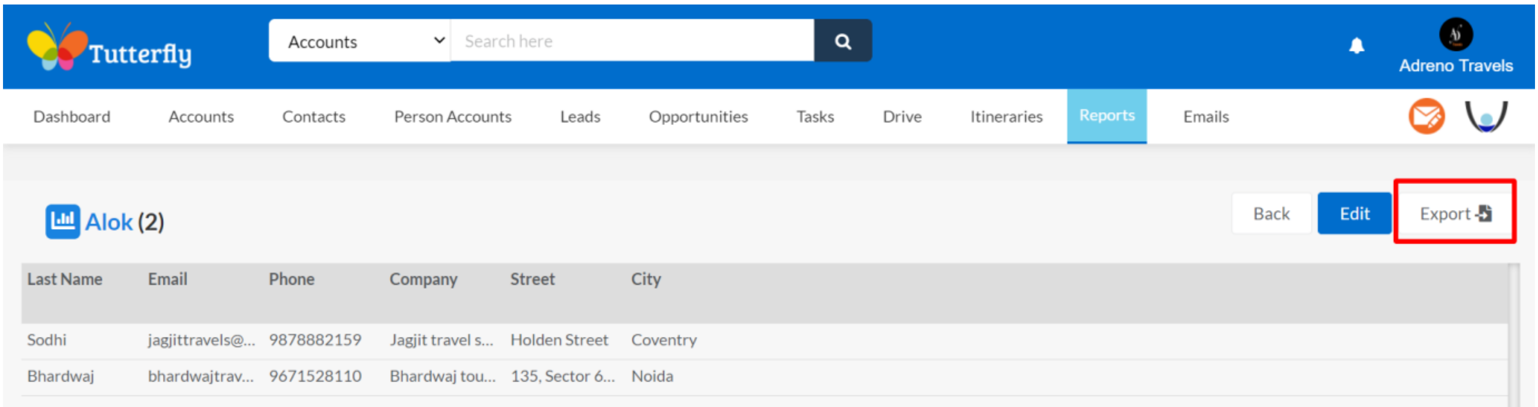
Step 3: This is the final one! A message box will appear indicating that a new folder has been created.



• Export Report:-

Only Admin can export files from the CRM.

Step1:- Click on Export



• Drive

Files are the foundation repository of your TutterflyCRM account. Here are some steps to use them in the best way:

What is Drive?

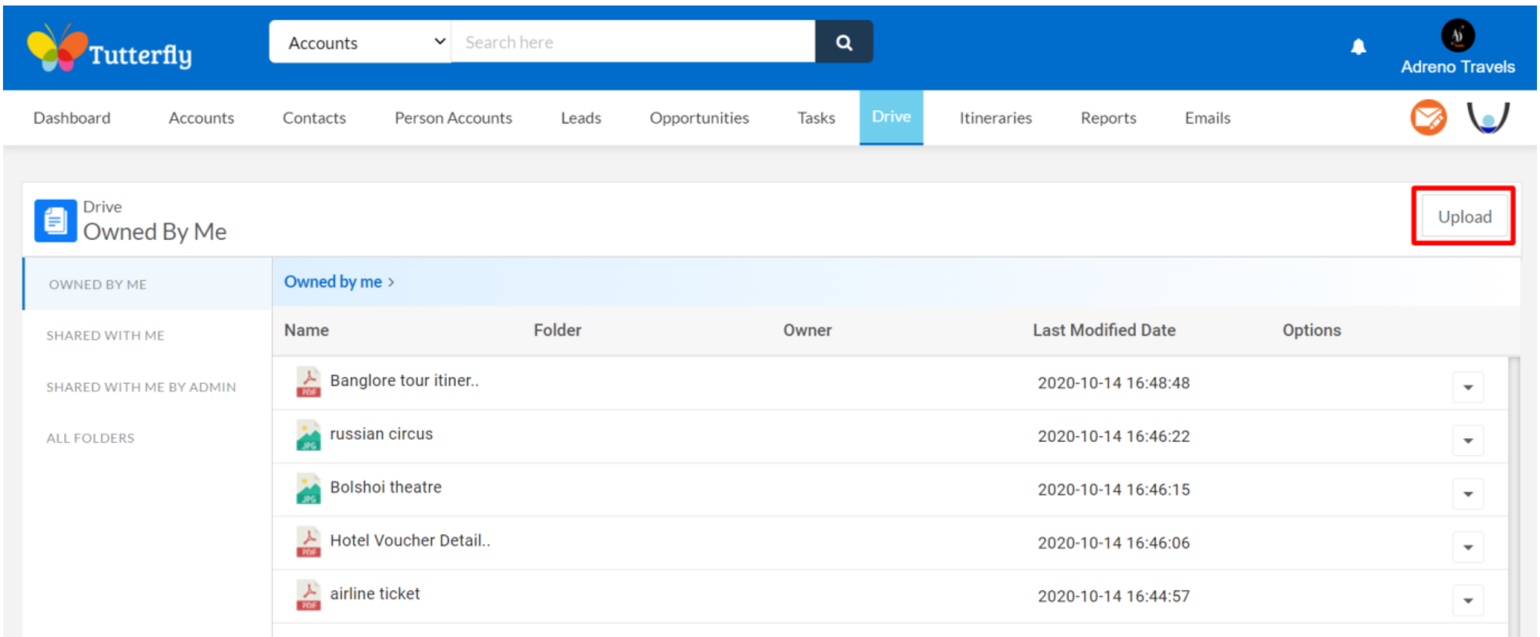
TutterflyCRM's Drive enables a user to control and manage Files from the 'Drive' tab. This simplifies the file management process. It provides different ways to upload and manage data with its customized features. It can be used to store itinerary, passport, air ticket, proof of accommodation and other related travel documents.

- **Owned By Me-**This contains a list of Files that are uploaded by the logged-in user.
- **Shared With Me-** All Files shared with you are stored in this folder.
- **Shared with Me by Admin-** It stores Files shared by the admin.
- **All Folders-** It will enlist all the folders containing above-listed Files.

Great! Now you are all set to access the Files resource and manage them.

• Uploading Files to TutterflyCRM

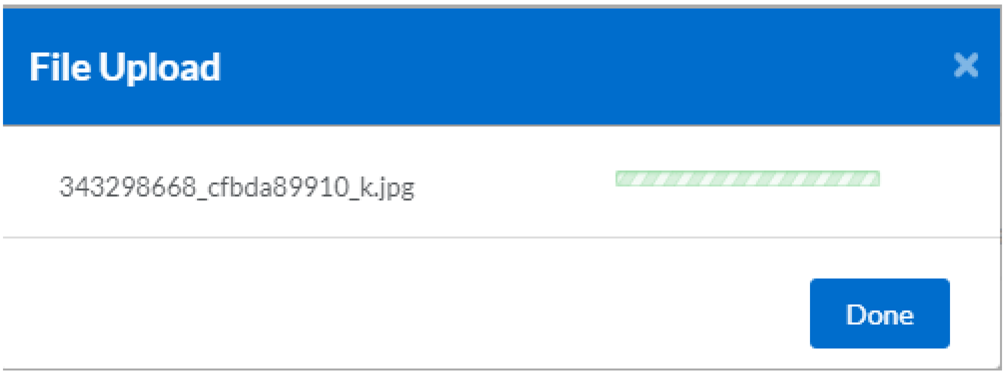
Uploading Files is easy if you read the following steps:.



Step 1: Click on the **'Upload'** button from the top-right corner.

Step 2: From the **'Open'** box, select the file you want to upload and click on 'Open' button.

Step 3: Hurray! We are at the final steps. Wait for the upload process to complete.

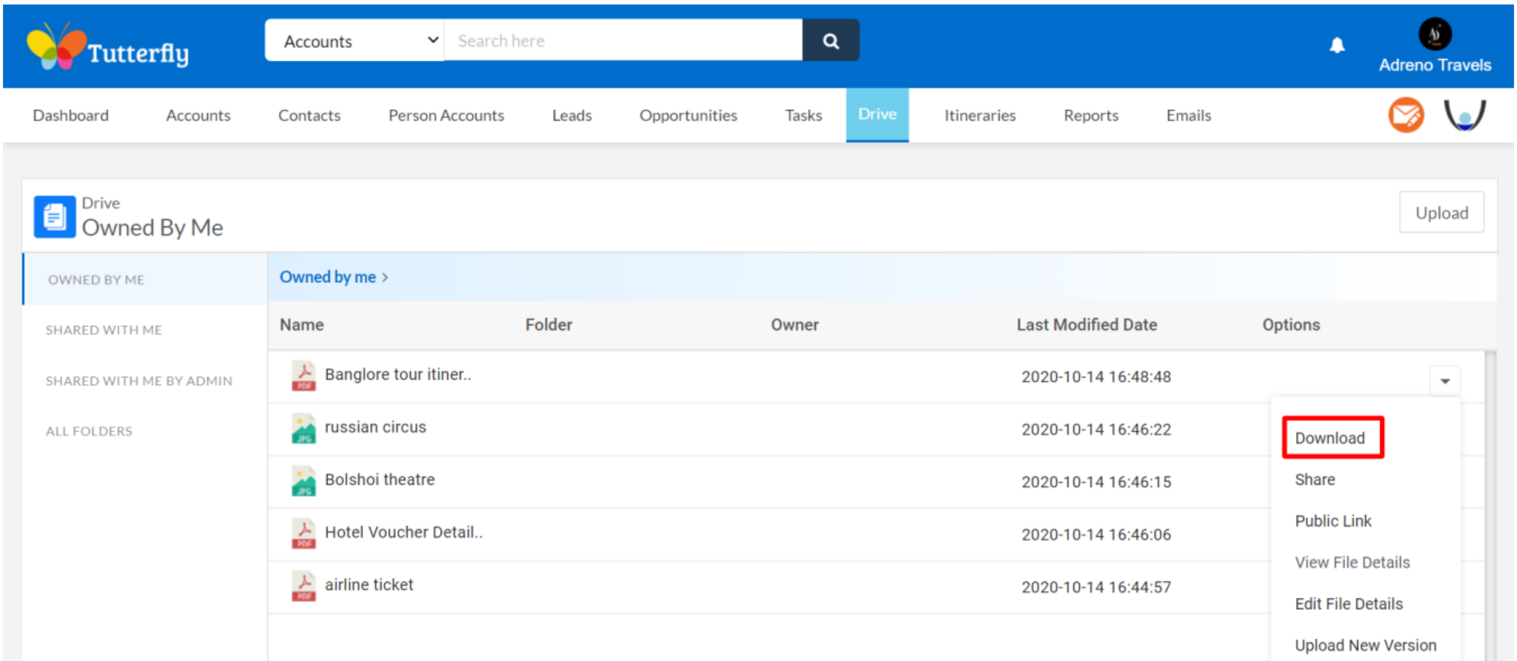


Step 4: Great! Click on **'Done'** to complete the upload process.

Download a File

Download Files in a flash off TutterflyCRM using the steps below:

Step 1: Click on the inverted triangle symbol from the **'Options'** tab.

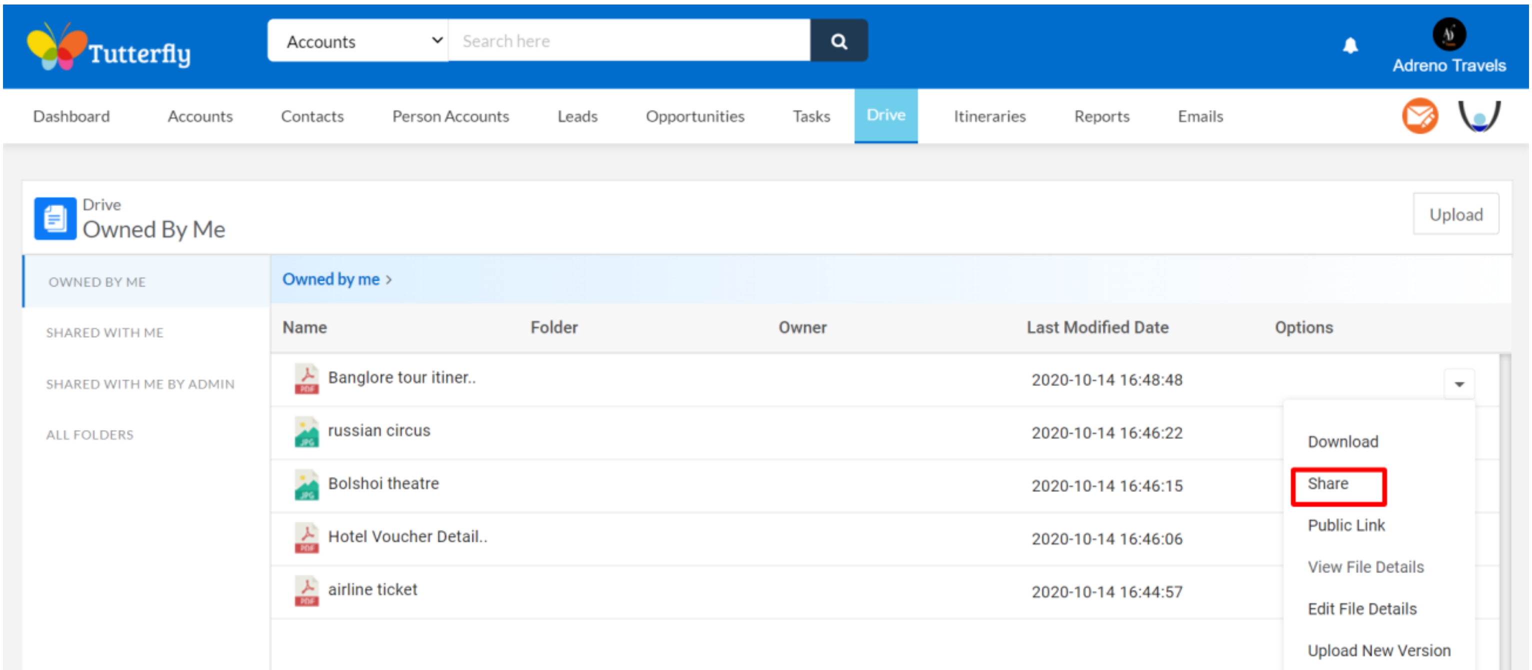


Step 2: Here we are at the end! Next, just click on the 'Download' option to start the downloading.

How to Share a File?

Sometimes you need to share Files with others. TutterflyCRM has a simple and easy way to get this done! This page can help you understand how to share a File in a few simple steps. Read on!

Step 1: Go to Options column, and click on the inverted triangle symbol.



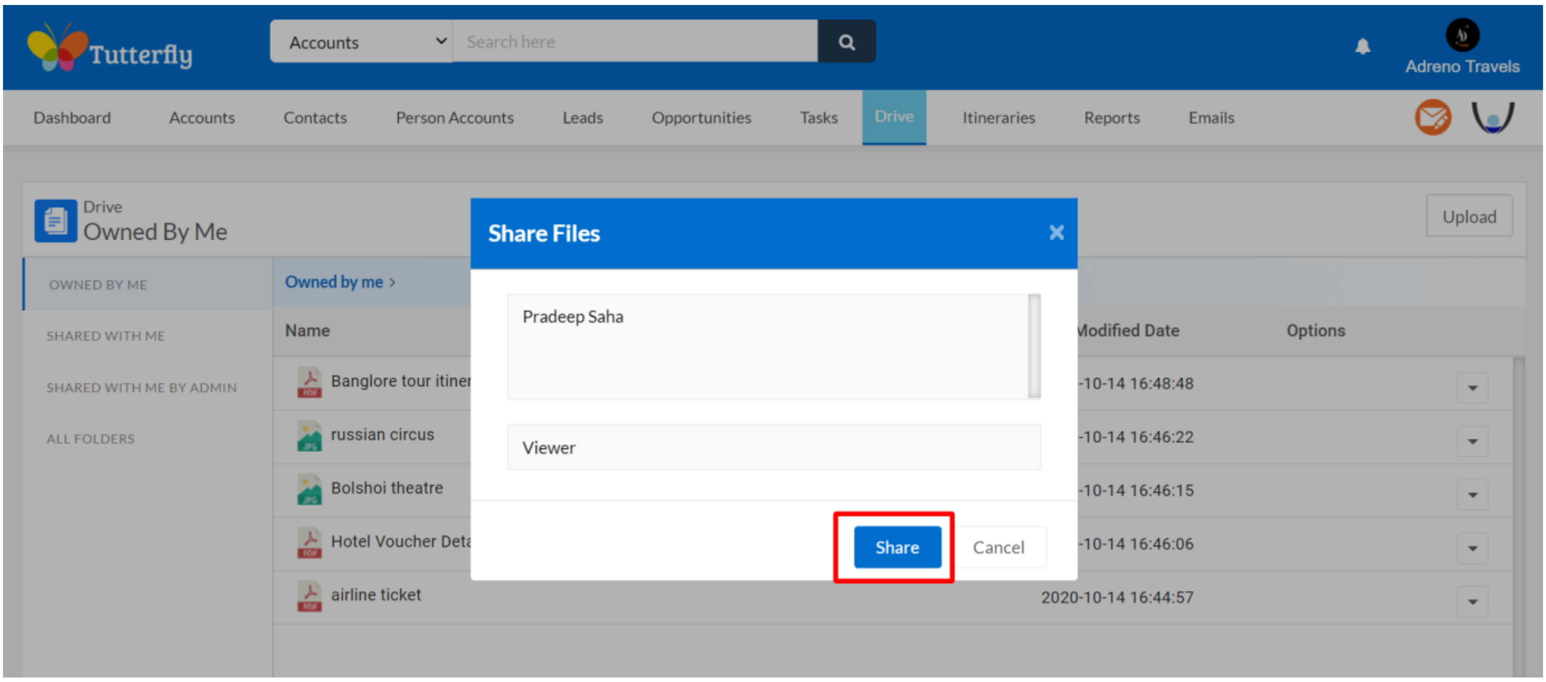
Select the 'Share' option.

Step 2: From the **'Share Files'** box, select the **'Viewer'** or **'Collaborator'**.

Viewer: A viewer has limited rights to the File. They can preview, download, share and attach a File to post. They cannot edit, upload a newer version or change permissions to the File.

Collaborator: Collaborator has access to preview, download, share and attaching a File to a post. They can also edit, upload a newer version and change permissions to the File.

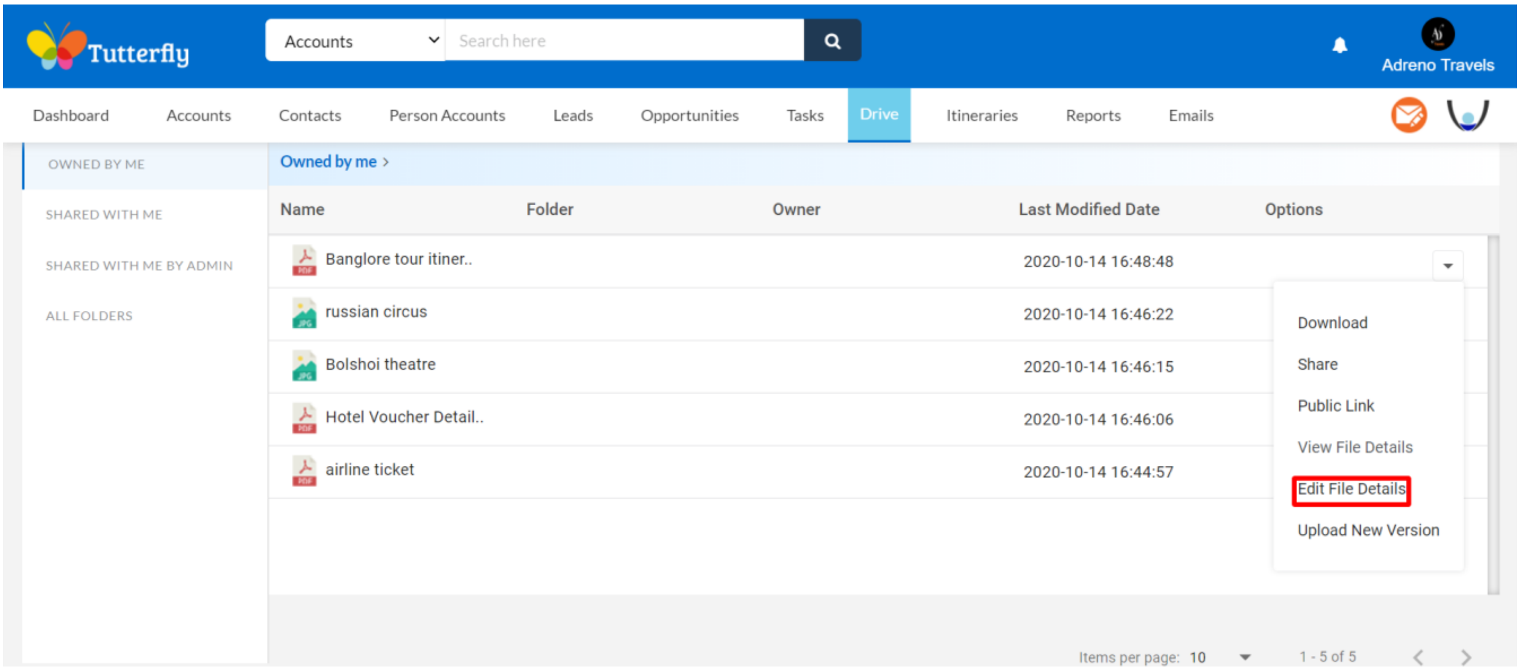
Step 4: Great! We are almost at the end! Select the user name with whom we will share the File.



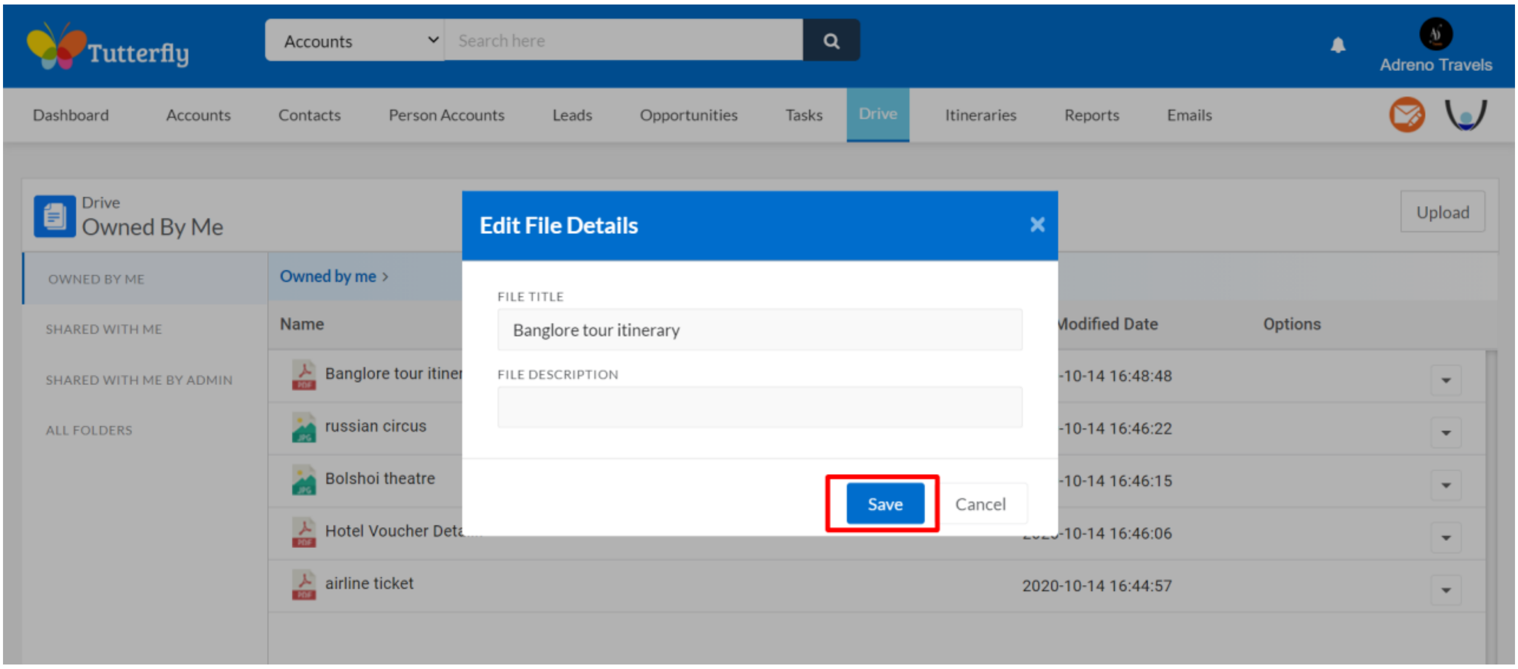
How to Edit a File?

Update the details of any file uploaded in your TutterflyCRM. Continue reading to know more.

Step 1: Click on the inverted triangle next to the File that will be edited.



Step 2: From **'Edit File Details'** type-in the File title and File description.

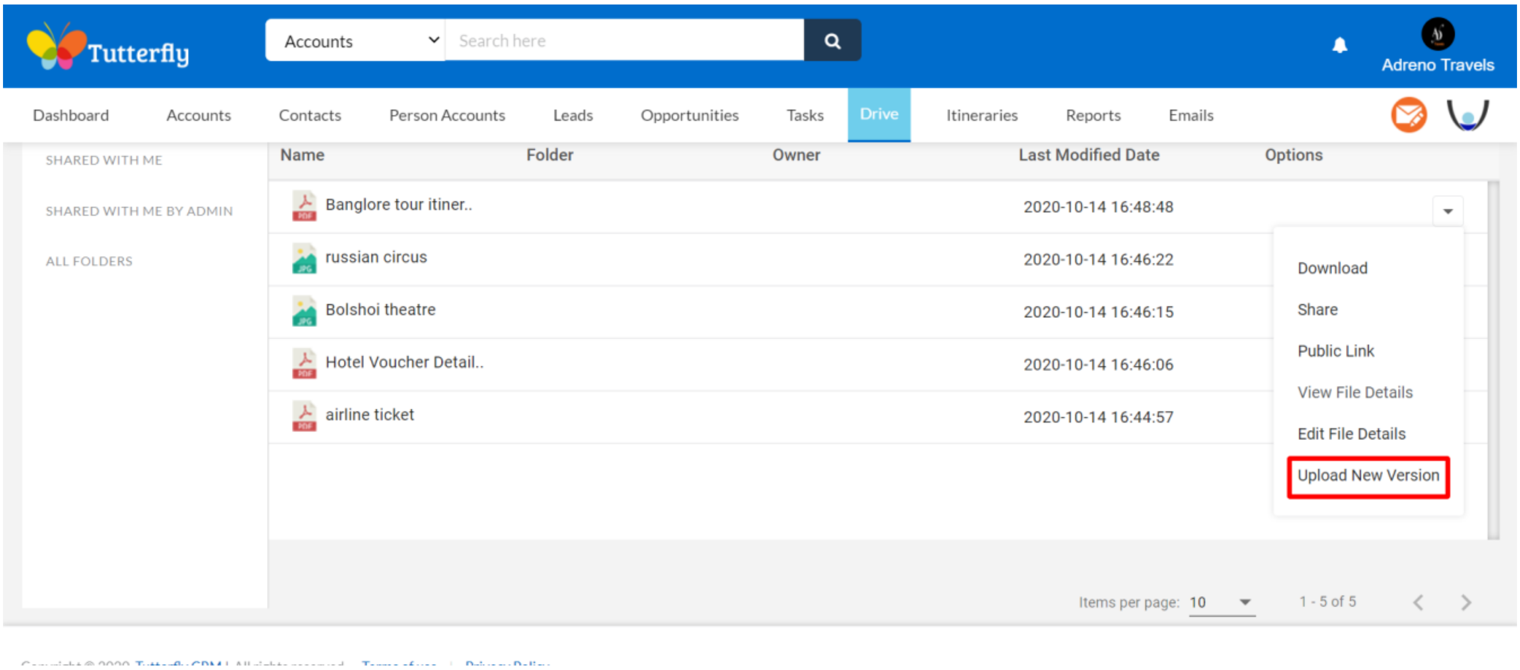


Step 3: Here we are at the last step. Click on the **'Save'** button to complete the process.

Upload New Version of the File:

Upload the latest version of a file in TutterflyCRM by following the steps below:

Step 1: Go to Options column and click on the inverted triangle symbol. Next, go to **'Upload New Version'.**



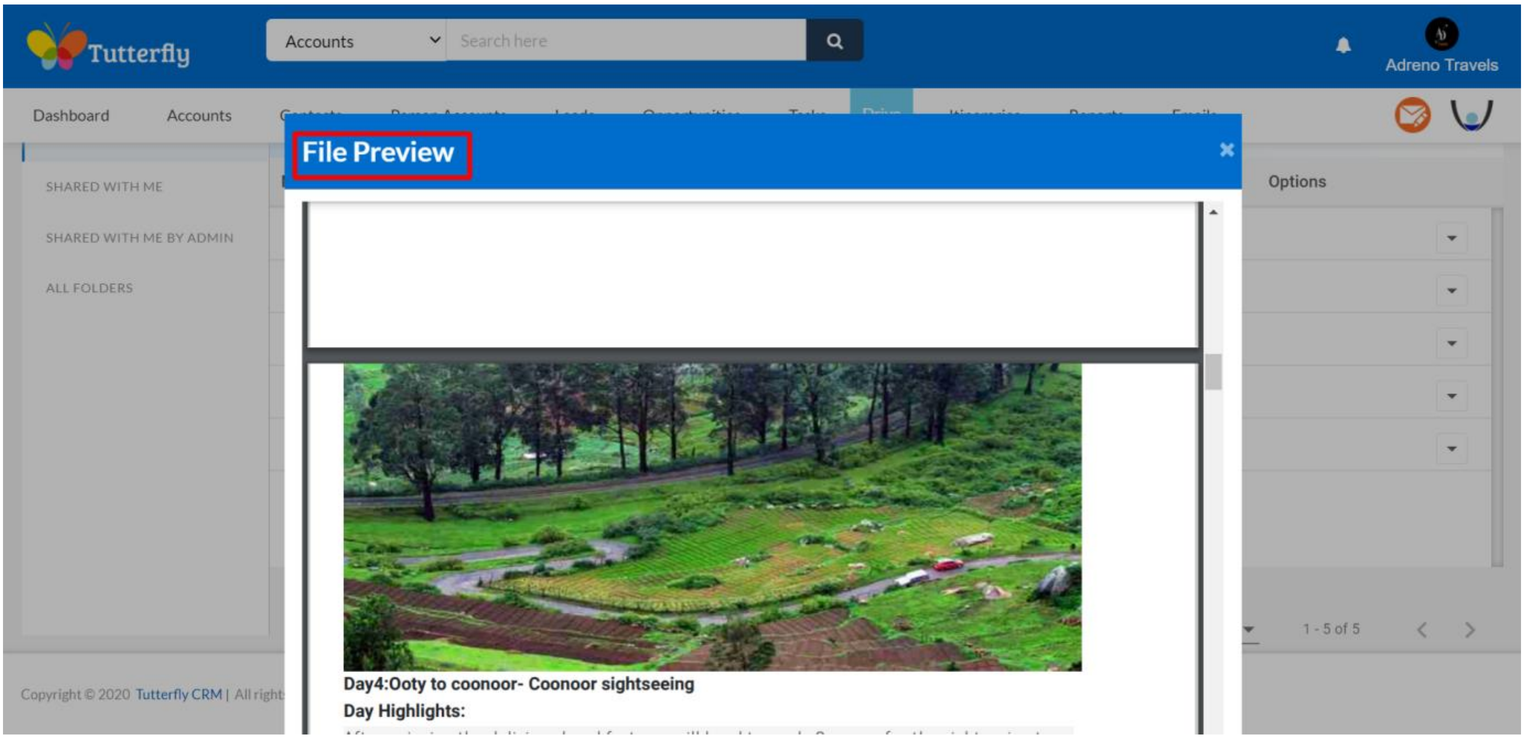
Step 2: From **'Upload New Version'** box, click on 'Upload' to update the old File in the TutterflyCRM.

Congratulations! We are almost at the end. From the 'Open' dialogue box, select the new version of the same file and click on 'Open' button. This is the final step. A message will appear saying 'File Uploaded Successfully' signifying successful completion of a task.

How to Preview a Document?

TutterflyCRM allows creating file previews in just a few clicks. Here's how to do that:

Step 1: Click on the file whose preview you want to access. A preview window will appear there.



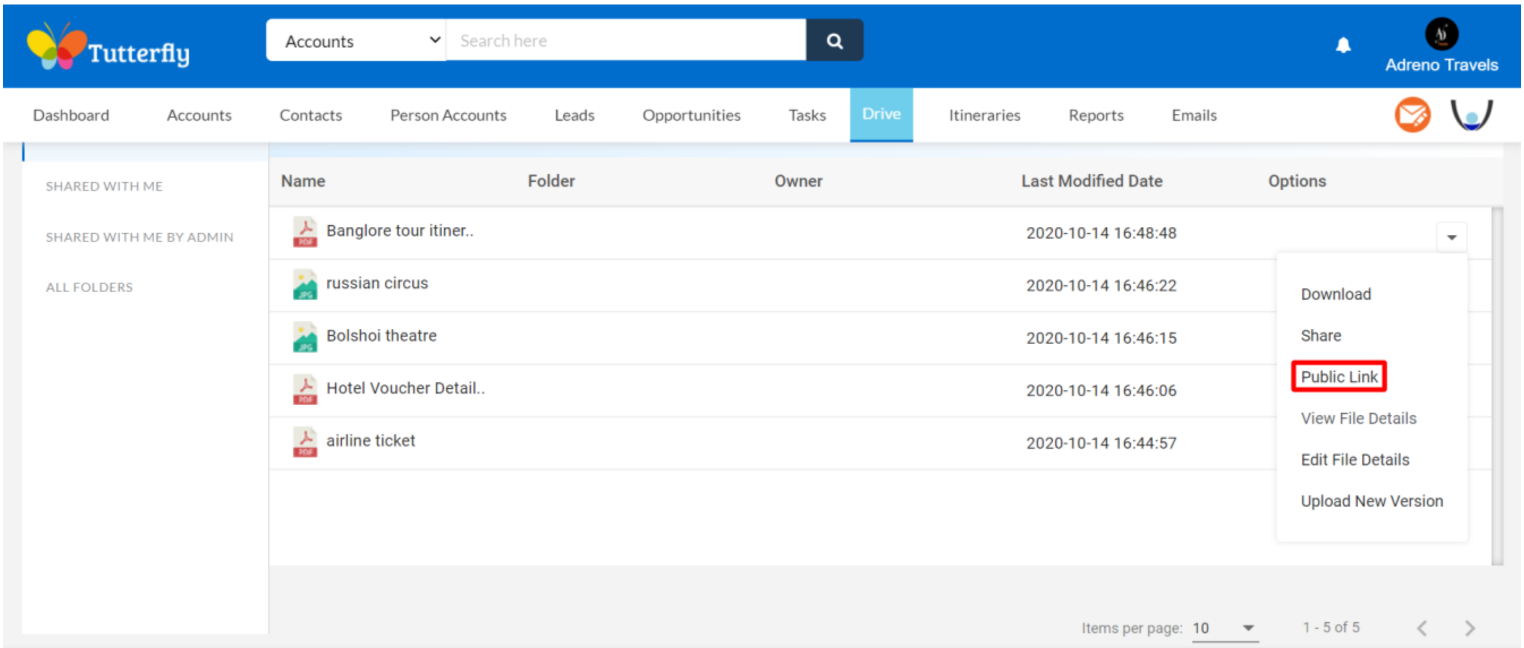
Click on the cross icon on the top-right corner to close the preview window.

Share the Public Link

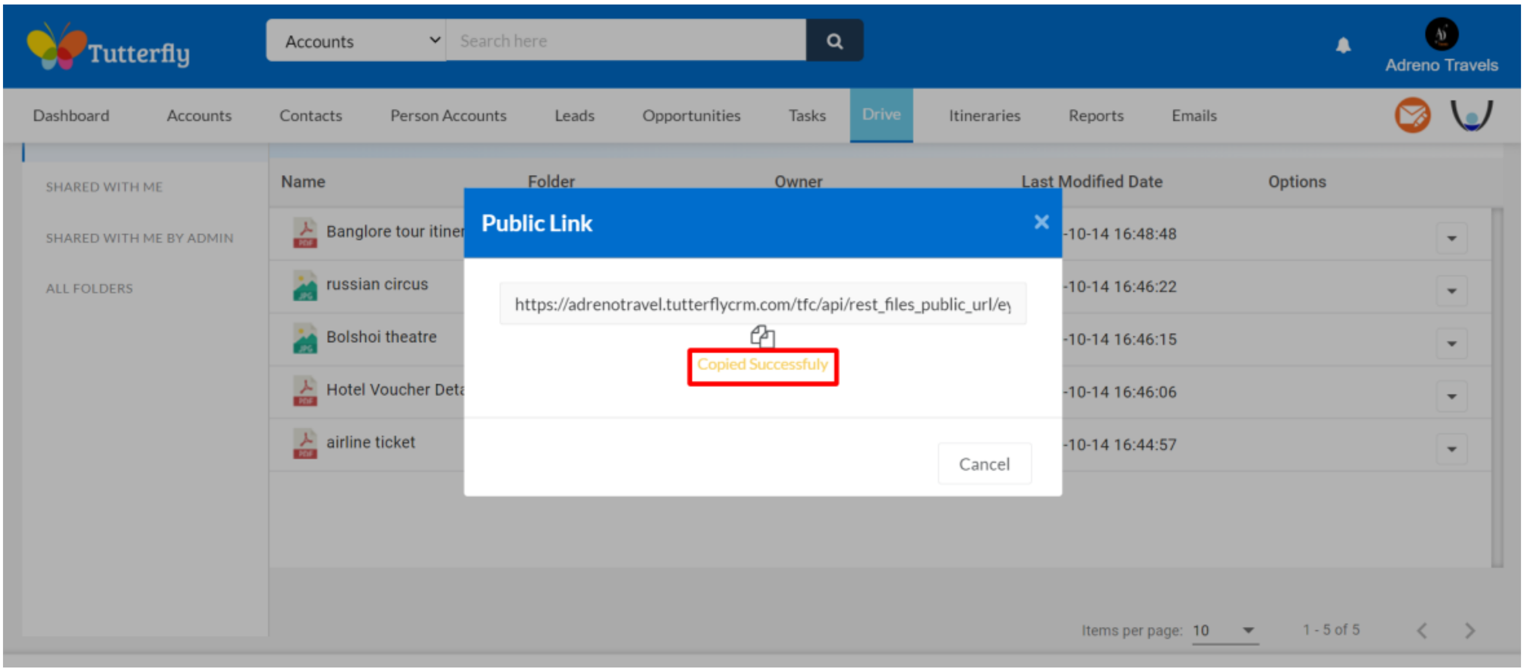
Your business requires you to share a file stored in Files on TutterflyCRM. Here's how you can

share a public link of documents easily by following the steps below:

Step 1: Go to **'Options'** column and click on the inverted triangle. Next, click on the **'Public Link'**.



Step 2: Awesome! From the **'Public Link'** box, copy the link or share it with other users.



• How to Create a New Person Account?

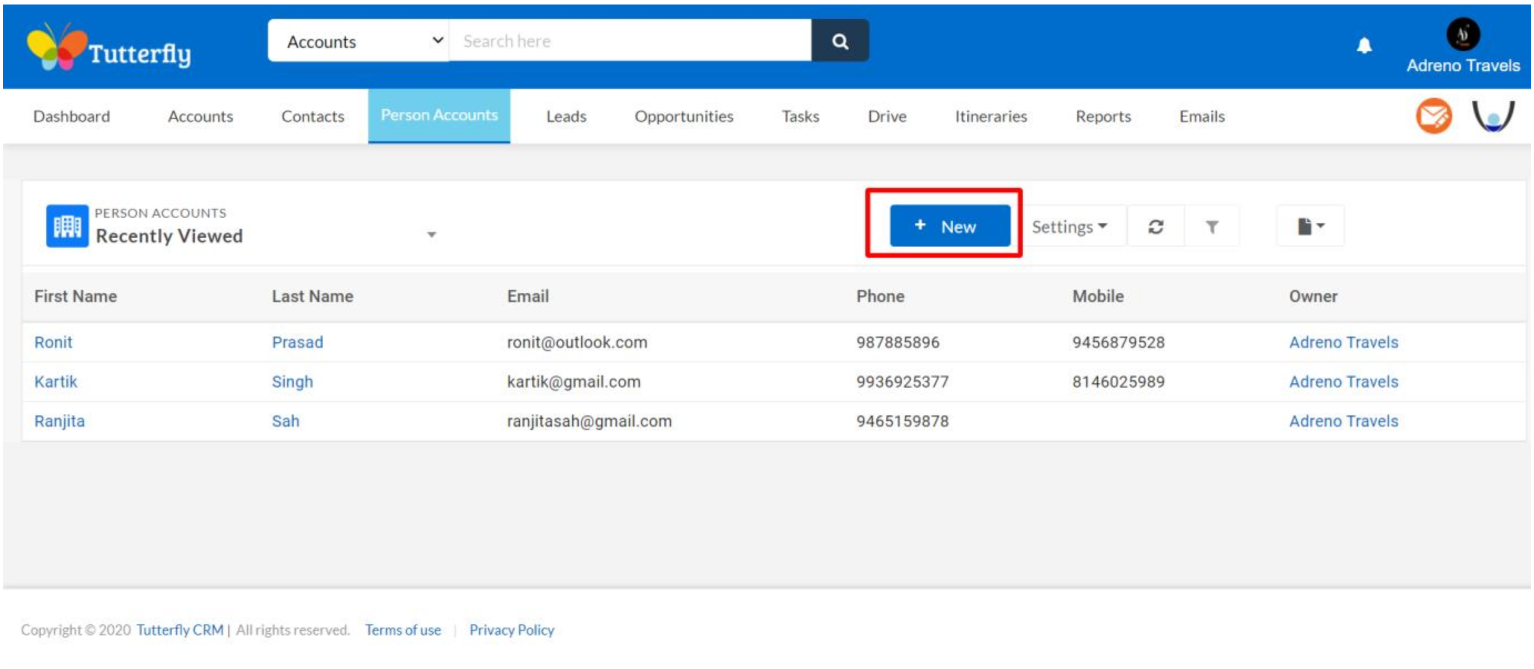
Start getting big business from your Person Accounts on TutterflyCRM. Learn how to make these below:

What is Person Accounts?

Person Accounts are the individuals who directly interact with our business to get tour packages without linking to any agency. We can also consider them as contacts in many situations.

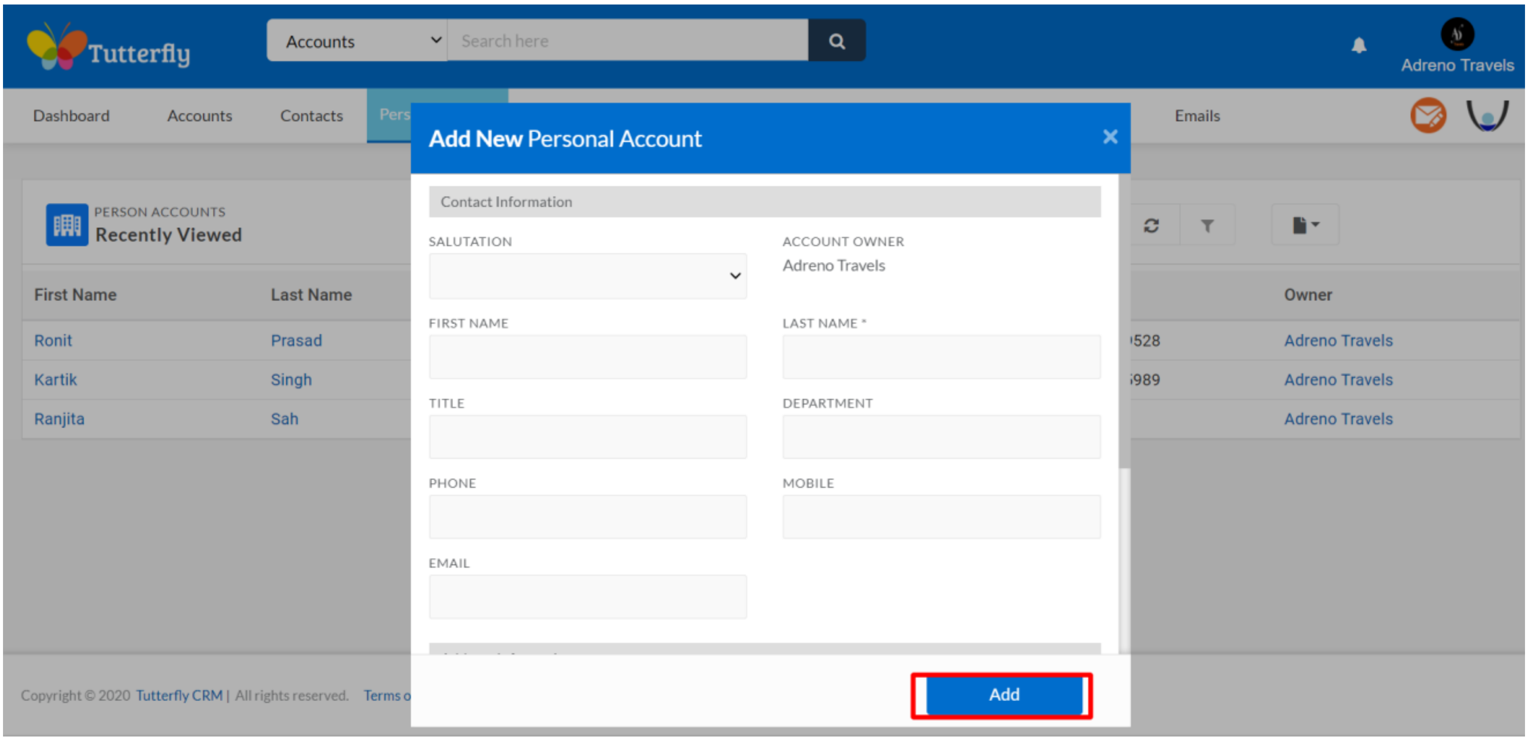
Create a New Person Account

Go to **'Person Accounts'** section in TutterflyCRM and click on **'+New'** button.



Step 1: A window will appear to add a new Person Account. Fill in all the details.

Note: The **'Last Name'** field is essential to mention.



Note: When you write in something in the billing address field, you will get automatic suggestions. make use of them!

Step 3: Great! We are almost at the end. Now, click on the **'Add'** button to add a Person Account into the system.

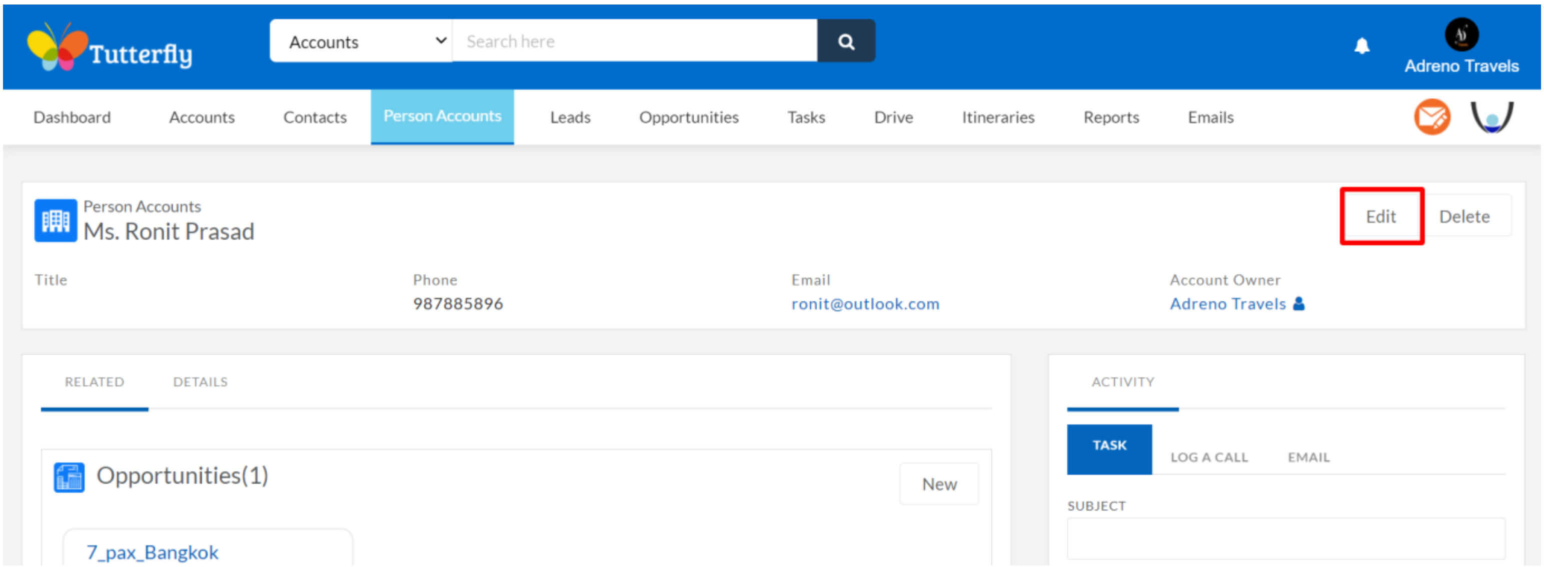
Step 4: Finally! A message box will appear as shown in the image below:

• How to Edit a Person Account?

Make changes in Person Accounts on TutterflyCRM by reading below:

Step 1: To access details regarding a single **'Person Accounts'** record, click on the link of the **'Name'** field.

Step 2: A new page will appear. Click the Edit button from the top-right corner to make any changes.



We are almost at the end! From the **"Edit Account"** window, change the fields necessary and click on **'Save'** button.

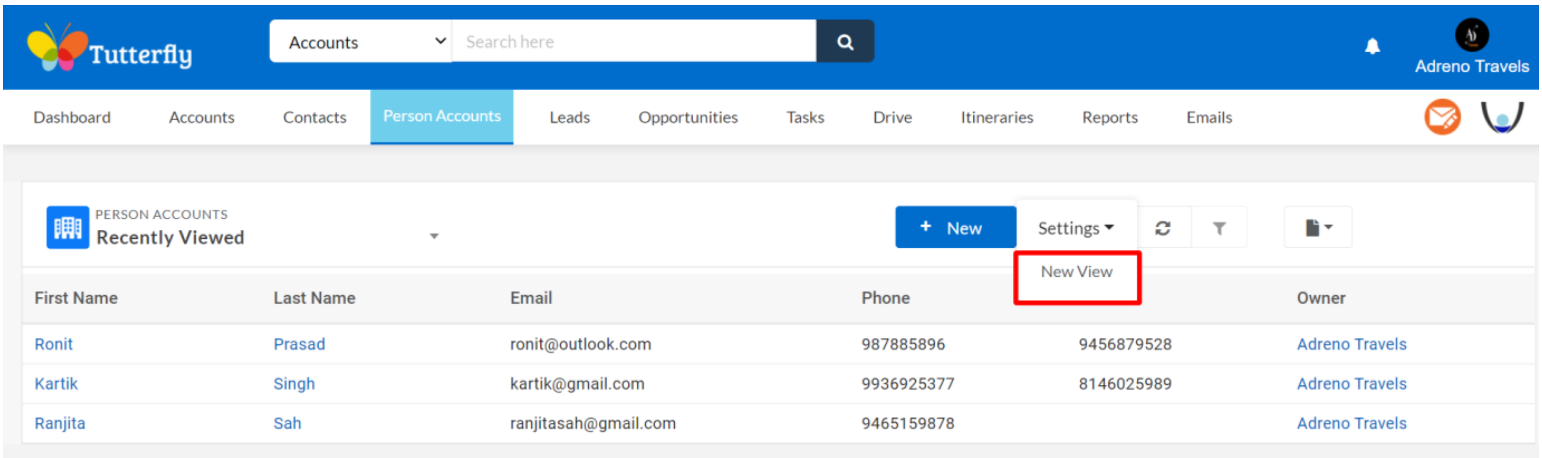
Congratulations! You have updated Person Account as shown in the box below:

• Reating and Managing Views

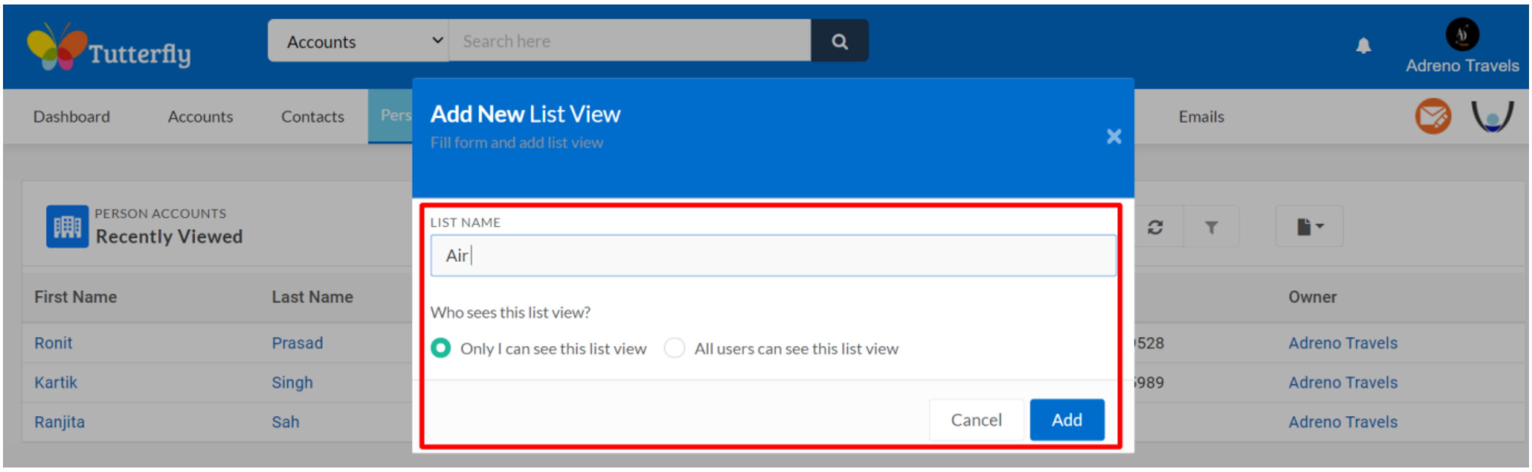
Here's how you can make Views and better process your Person Accounts in TutterflyCRM:

Create a new View in Person Account

Step 1: Click on the Settings >> New



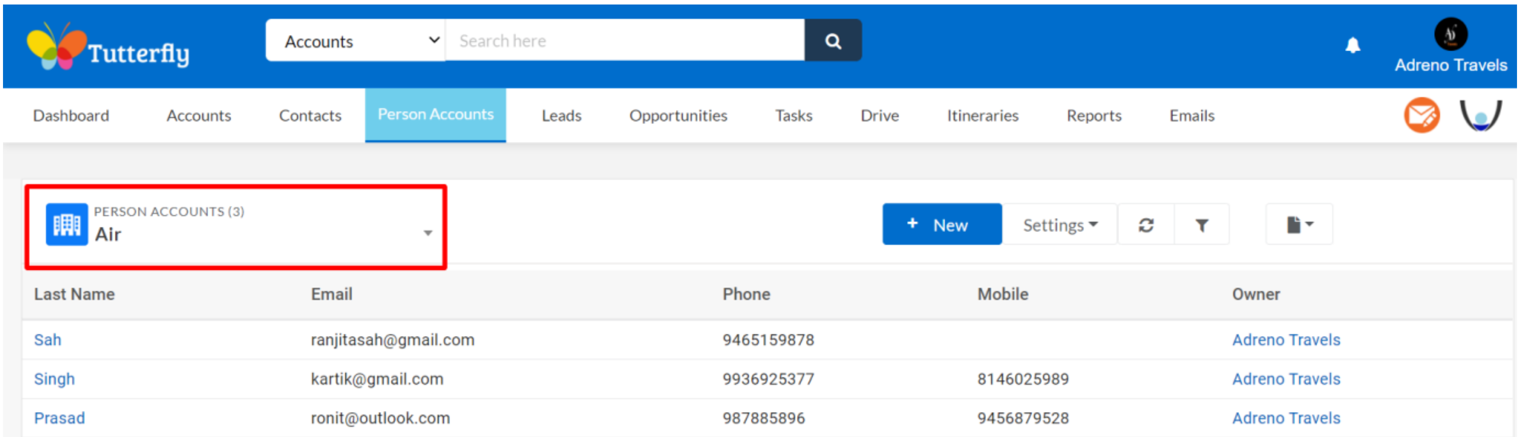
Step 2: It will display a window that will look like the image below:



Step 3: Type in the **'List Name'** and choose the appropriate display settings.

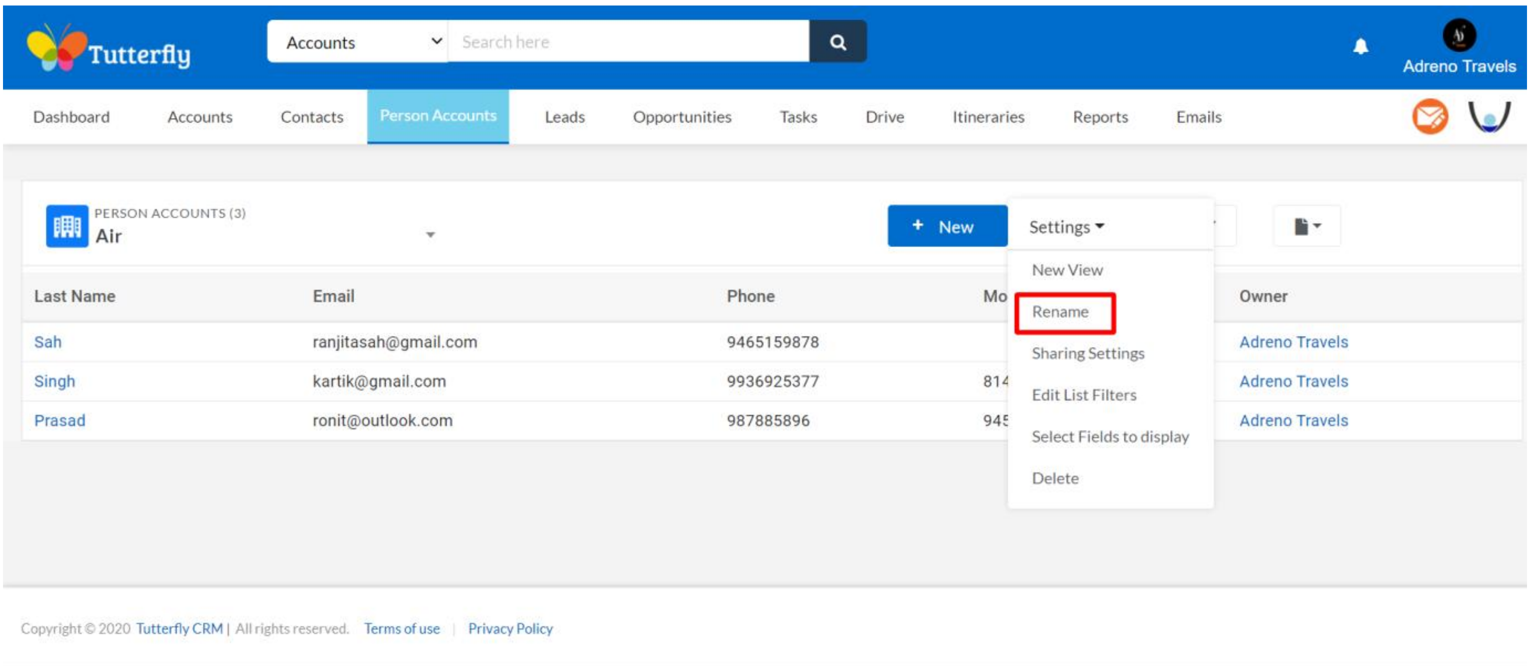
Only I can see this List-View: Only the logged in user can access this View. All users can see this List-View: All users can access this View.

Step 4: Click on the **'Add button'**. The new View gets added to the list of Views displayed in the top-left corner.

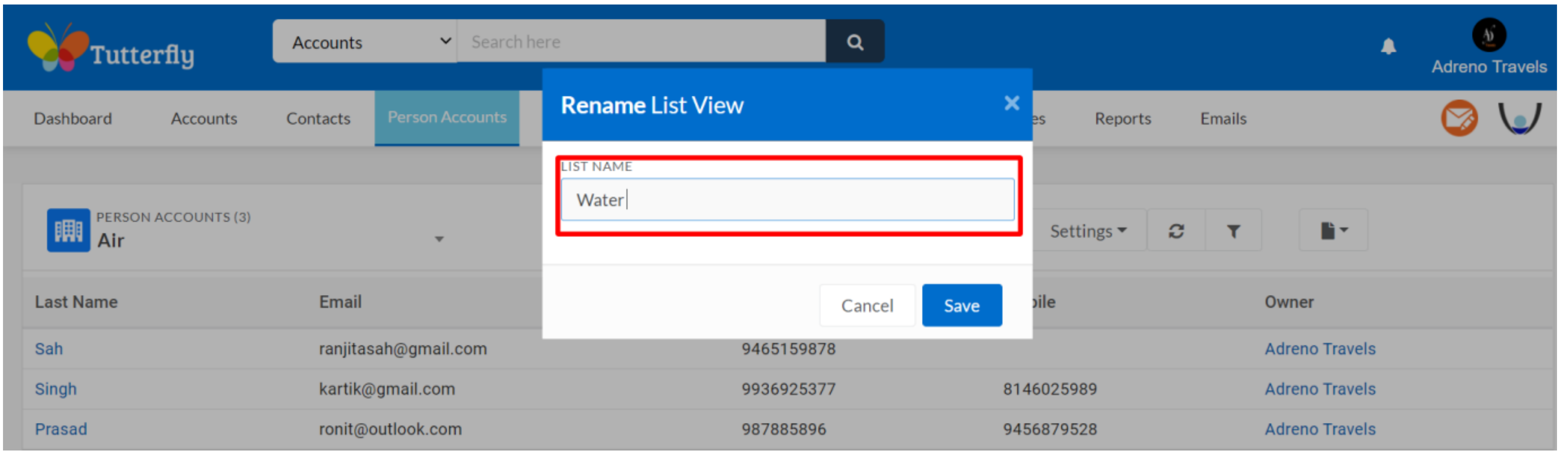


• Rename an Existing View

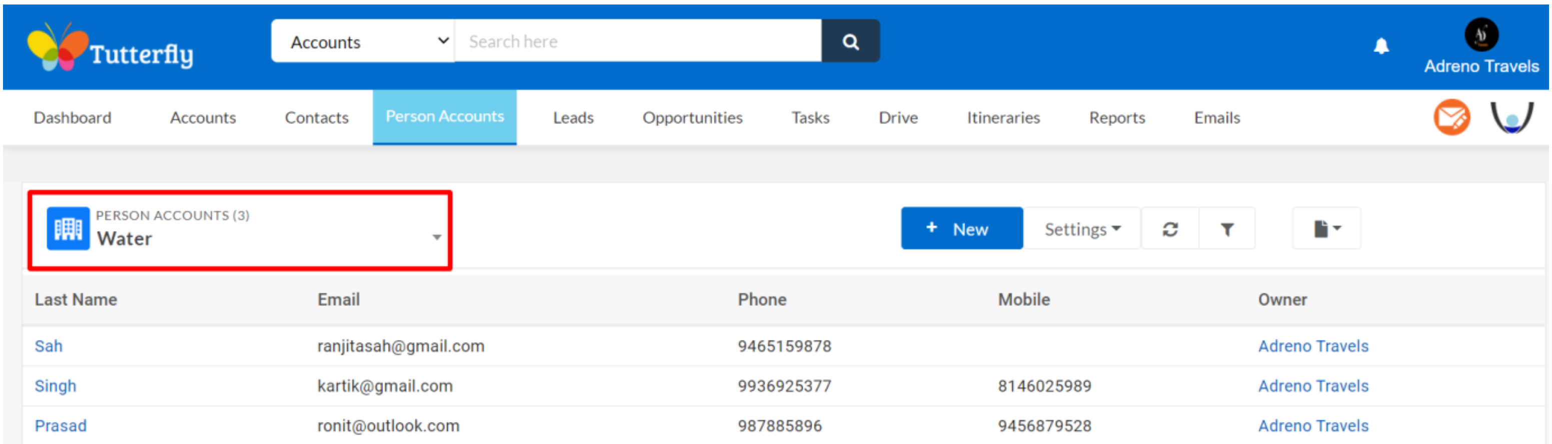
Step 1: Go to **Settings >>** Rename.



Step 2: From the **'Rename List View'** title, type-in the new **'List View'** and click on **'Save'** button.



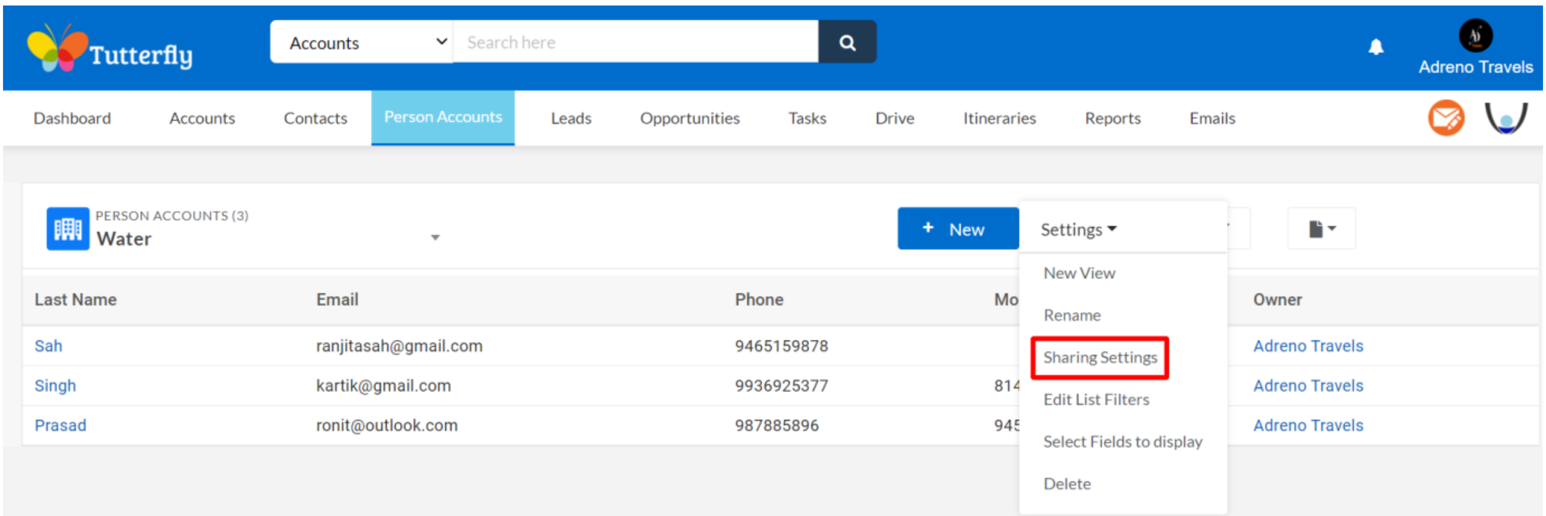
Step 3: A message box will appear to indicate that the rename has been completed successfully.



• Change the Sharing Setting

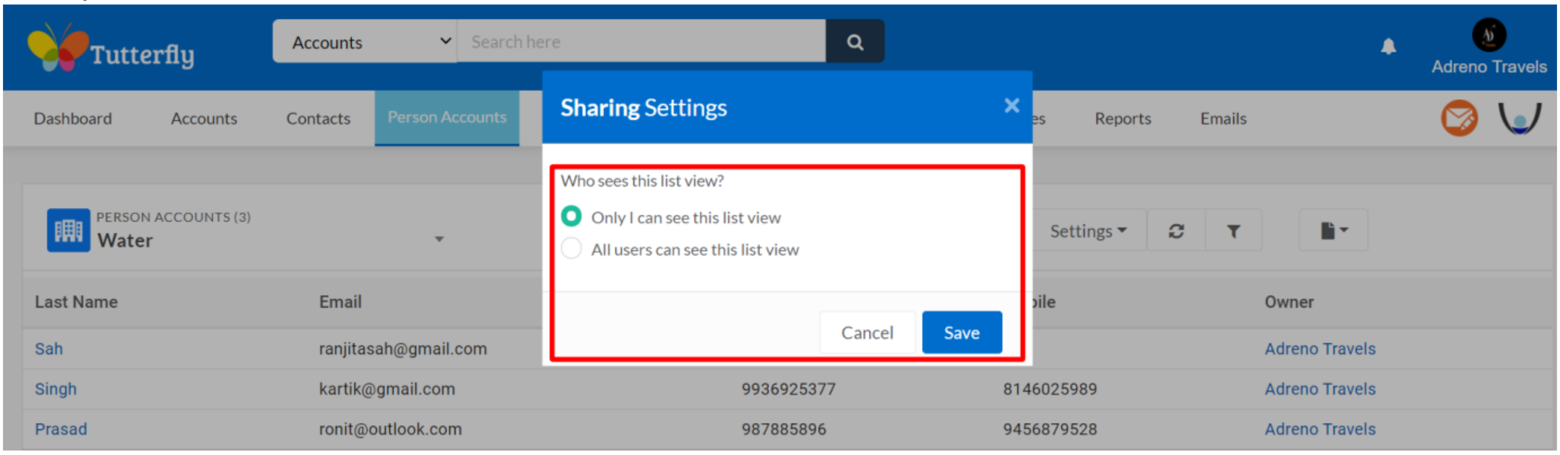
In TutterflyCRM, a user can control access to some parts of the data by using share settings. Listed below are steps to limit other users from accessing important data.

Step 1: Go to **Settings >>** Sharing Settings. A box will appear like the one shown in this image below:



Step 2: From the 'Sharing Settings' box, select the options to set the privacy level.

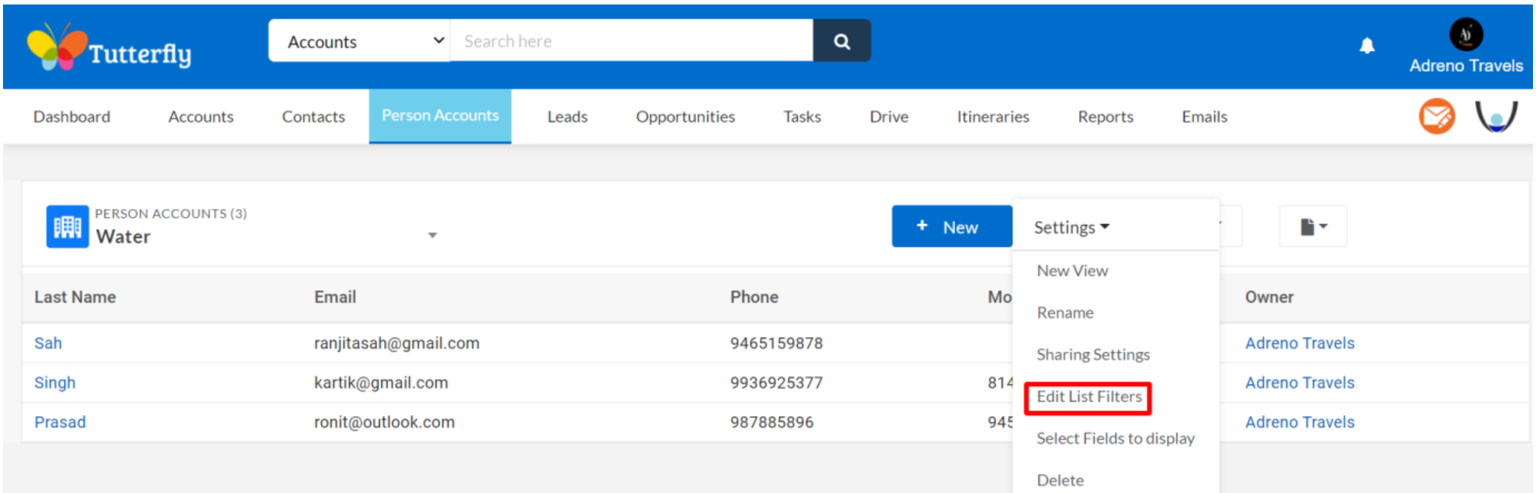
Step 3: Then, click on the **'Save'** button.



Edit List Filters

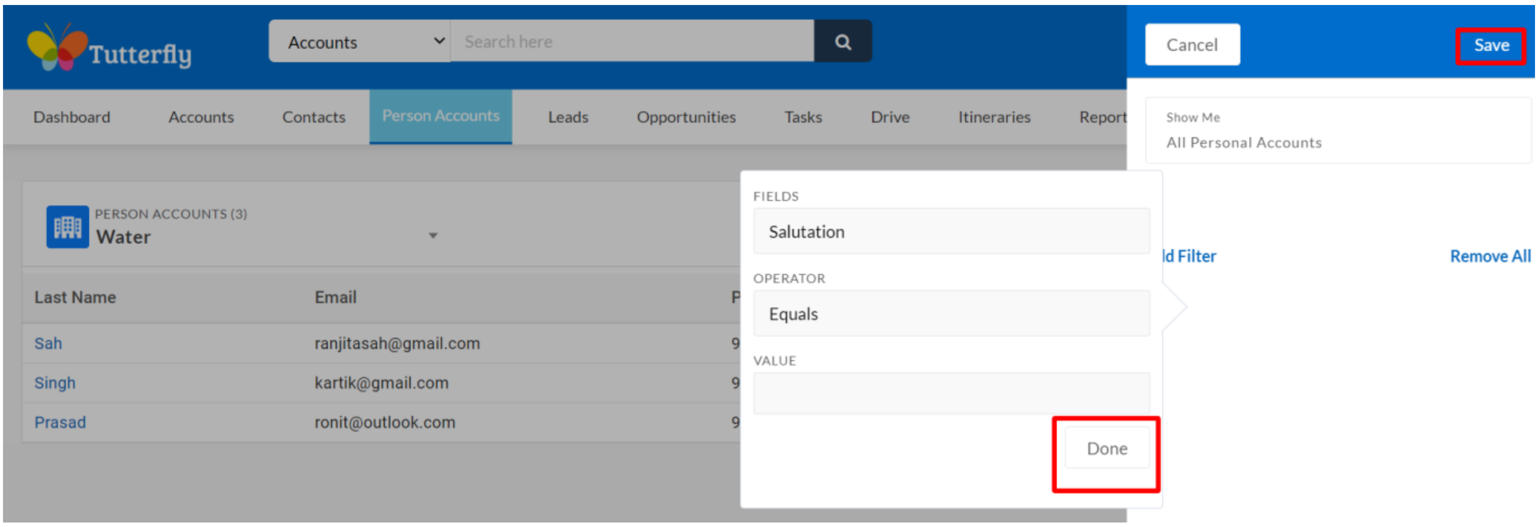
Manage Your List Filters easily for the best work output. Find out how to change List filters here:

Step 1: Go to **'Settings'** and click on **'Edit List Filters'**. A pop-up will appear in the right-hand corner.



Step 2: Click on **'Add Filter'** and fill in details such as a field, operator, and value. Then, click on the 'Done' button.

Step 3: After finalizing the filters, click on the **'Save'** button.



Step 4: A list of Person Accounts will appear filled with values that match the keyword such as **'New'**.

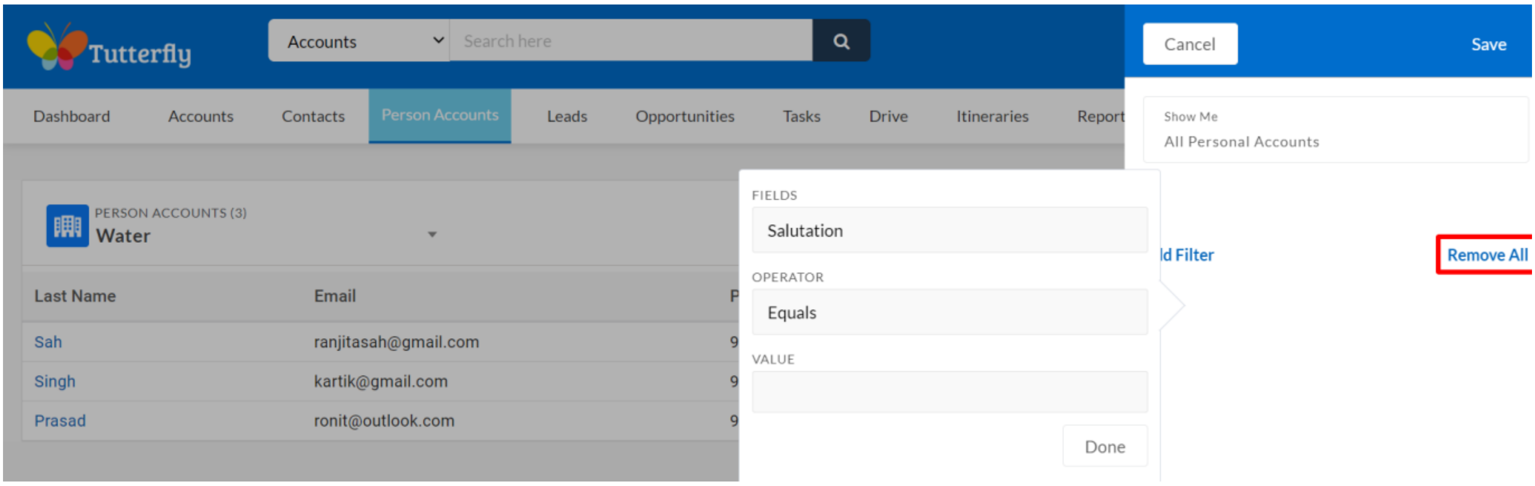
A user can also change visibility settings by clicking on the **'Show Me'** box. A user has to choose **'All Accounts'**, click on the **'Done'** button.

All Accounts: A user can apply a filter to View all the Person Accounts created by the admin and other users.

Note: We can also set these parameters from the filter icon.

Remove an Existing Filter

Want to delete an existing filter? Here are the steps to get this done.



Select Fields to Display

Modify your View Fields Filter with these steps below:

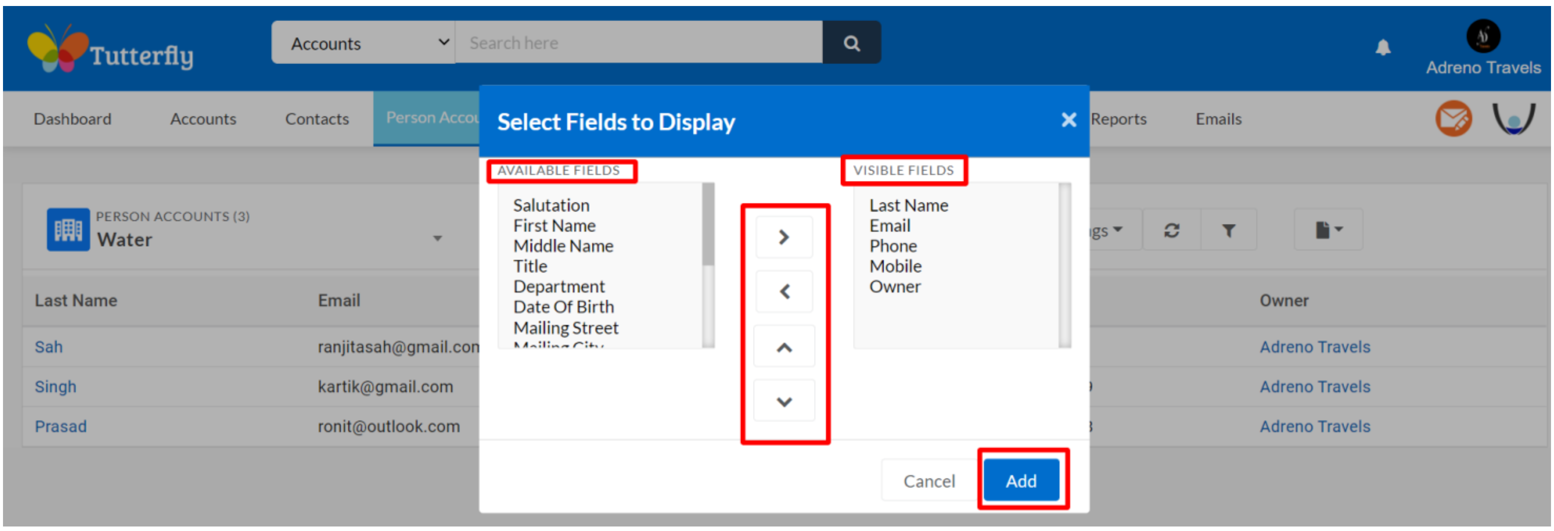
Step 1: Click on Settings >> Select Fields to Display.

From the **'Select Field to Display'** box, a user can add or remove fields that will be visible to the user in a View.

There are two sections: **'Available fields'** and **'Visible fields'**. To add an item, select column names and click on the **'>'** symbol. To remove an item from visible fields, click on the **'<'** icon. At last! We are reaching the final steps in learning all about Views. There is a functionality to set the order where each column will be displayed in a View. This can be achieved by clicking on the **'up'** and **'down'** icons.

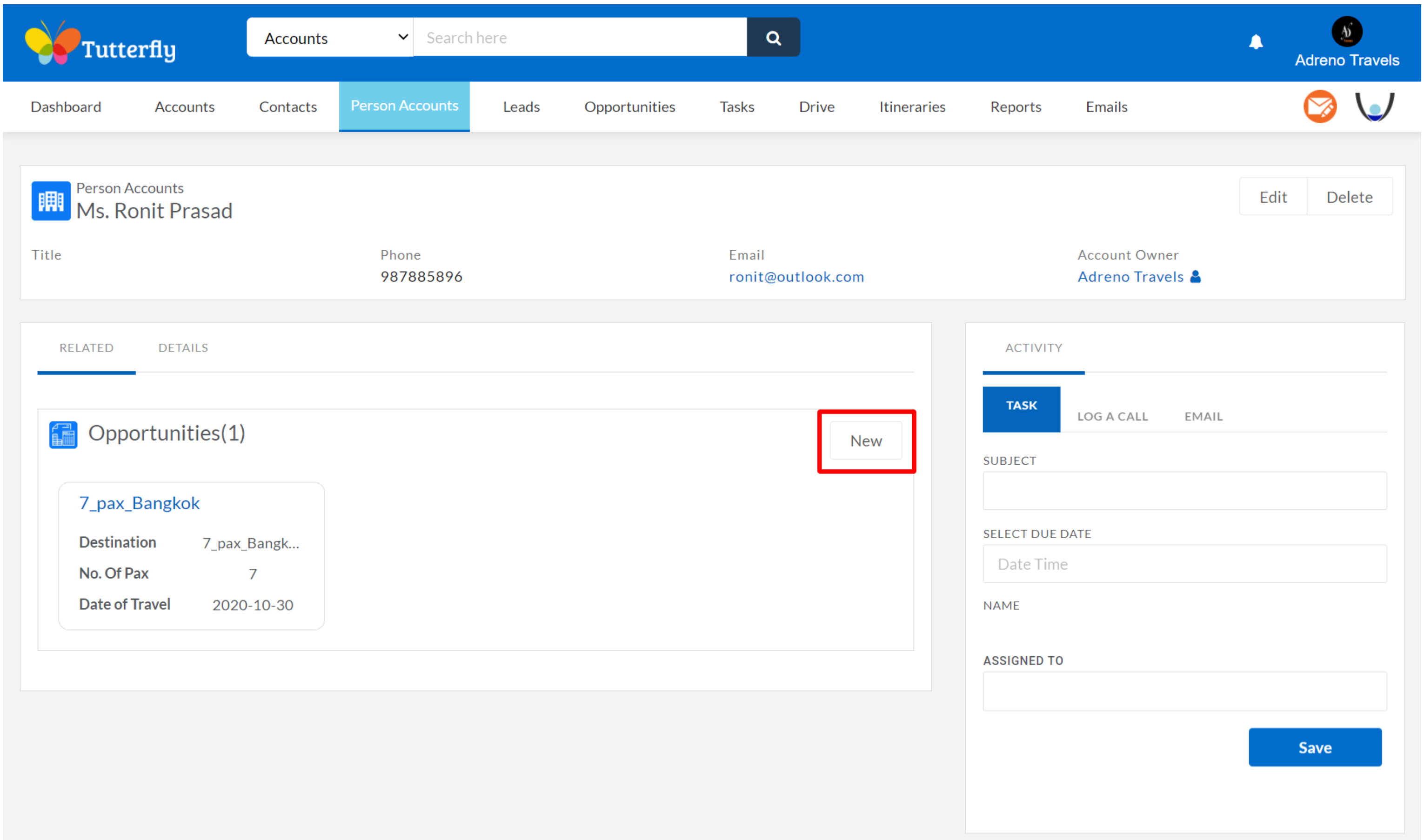
Step 5: Here we are! Now, click on the **'Add'** button to proceed with arranging columns as re-quired.

Note: Filter and other settings cannot be applied to the default View.

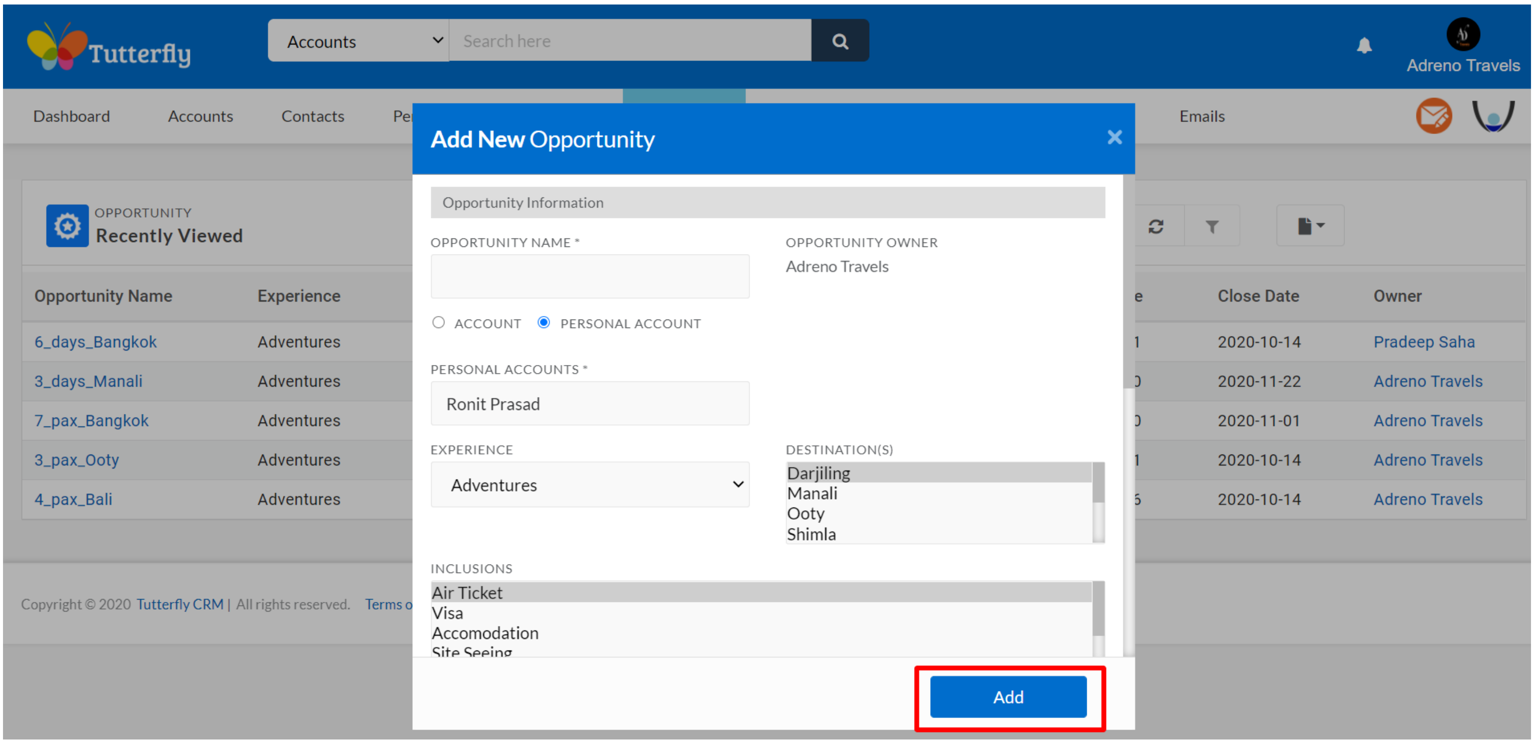


• Create a New Opportunity

Step 1: To create a new —Opportunity|| for each 'Person Account', a user has to click on the 'New' button in the 'Related' section.



Step 2: This will take them to the —Add New Opportunity|| section. The name of the contact gets automatically added to this form. Fill in all the details and click on the **'Add'** button.



Note: If a Person Account has more than six opportunities associated with each, they can be accessed by clicking on the **'View More'** link.

• Managing the Person Account Record

So, you've made it to the Person accounts Use help page. Now, read all the instructions carefully and follow them to manage a single Person Account record. Let's start:

'Related' Section

There are multiple opportunities related to each contact. A user can access information on each opportunity through this section.

Click on the link on the name of a **Person Account.**

A new page will appear. You can find **'related' and 'details'** section from this panel.

'Details' Section

This section contains extra information about the Person Account. A user can use it to access address, system and account details. TutterflyCRM shows a summary of all the opportunities made under this account.

Account Information

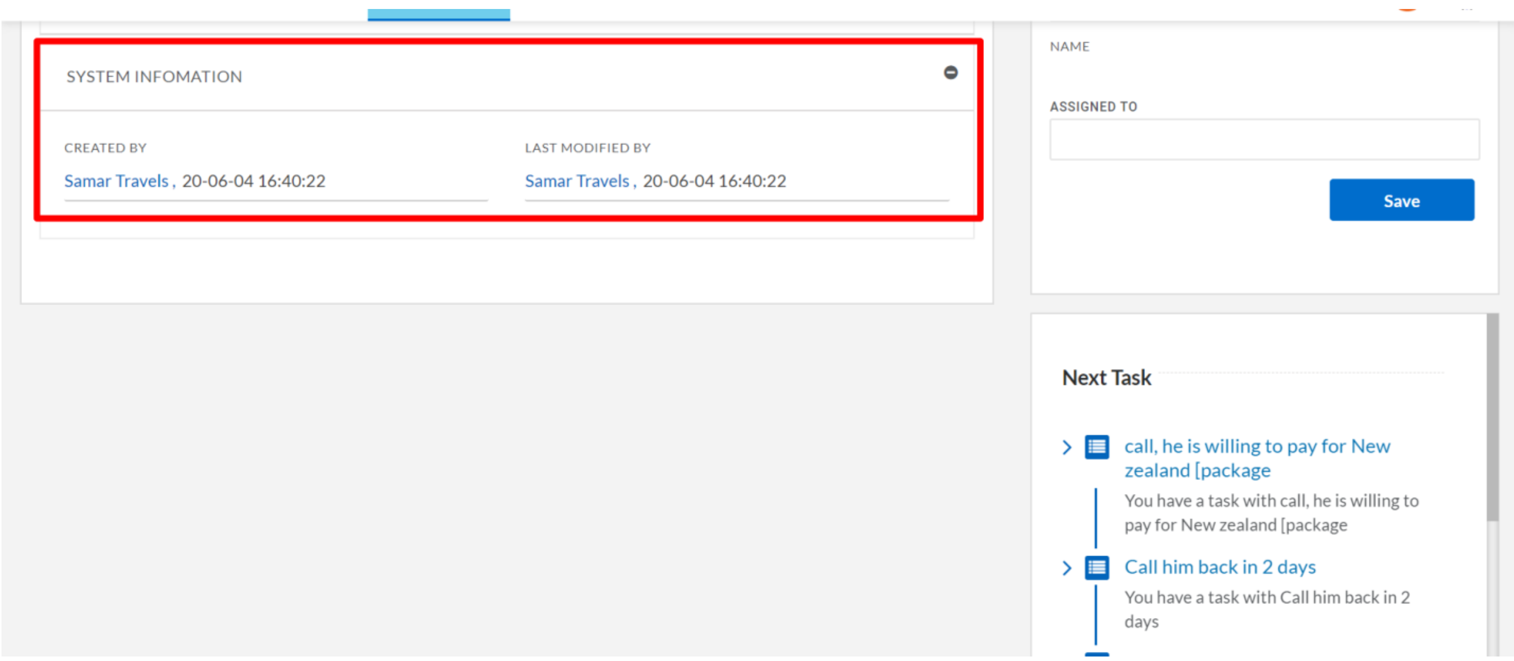
This section contains information about the current Person Account. Information like account name, the account owner, title, department, mobile and email address.

Address Information

This section shows the map of the address mentioned in the Person Account.

System Information

This is the final one! **TutterflyCRM** displays details of the user who **"Created"** and **"Last Modified"** the Person Account. It also mentions the date and time of changes made.



How to Use the 'Activity' Section?

Change your business prospects to perfect with using TutterflyCRM streamline activity section. Find out how to do that below:

Task

This is a to-do listing that is created in TutterflyCRM. A user can assign tasks to any of the other users. The user can also set due date to define a time limit for completing the task.

Call Logging

A user can enter telephonic conversations in text format using TutterfyCRM. You can use it to review information for the future.

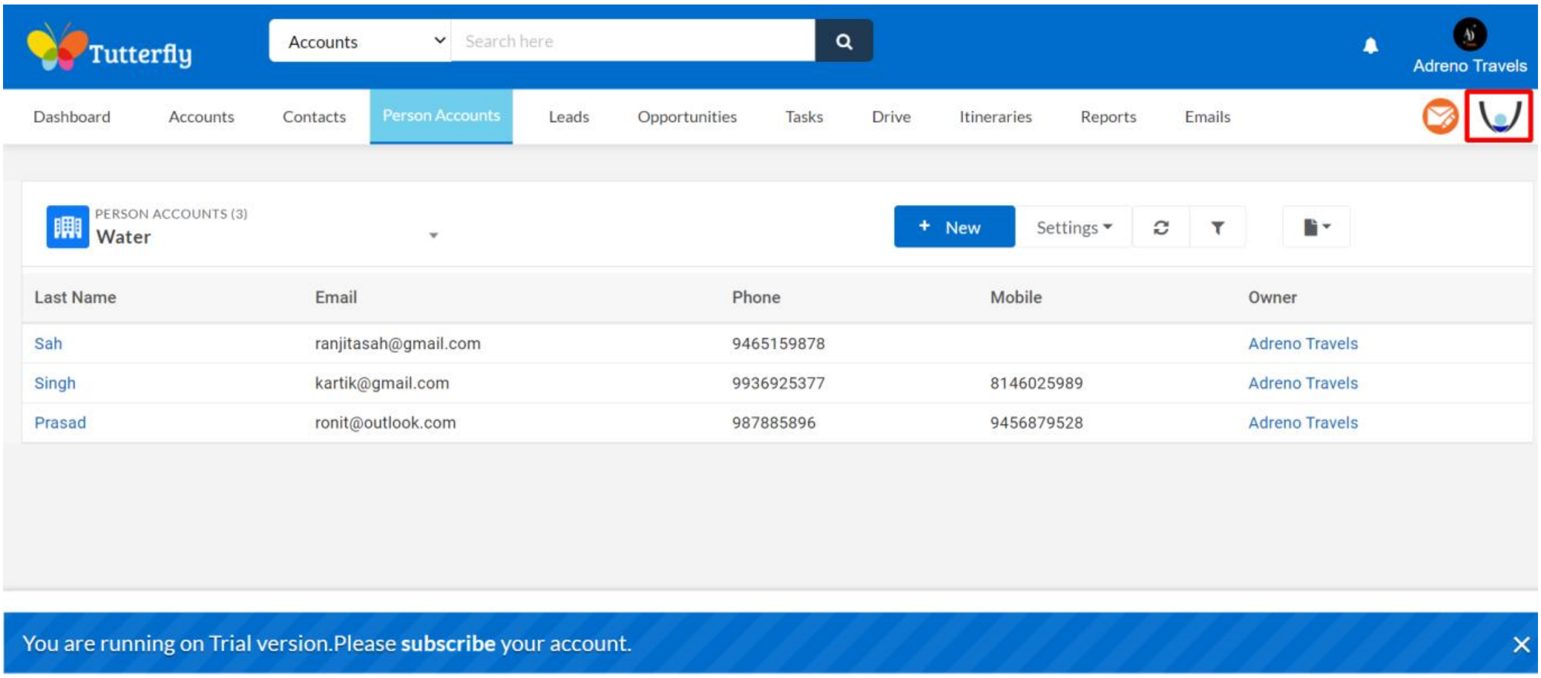
Email

Users can communicate and collaborate through emails in TutterflyCRM. While creating emails, a user can select a default template created by the admin.

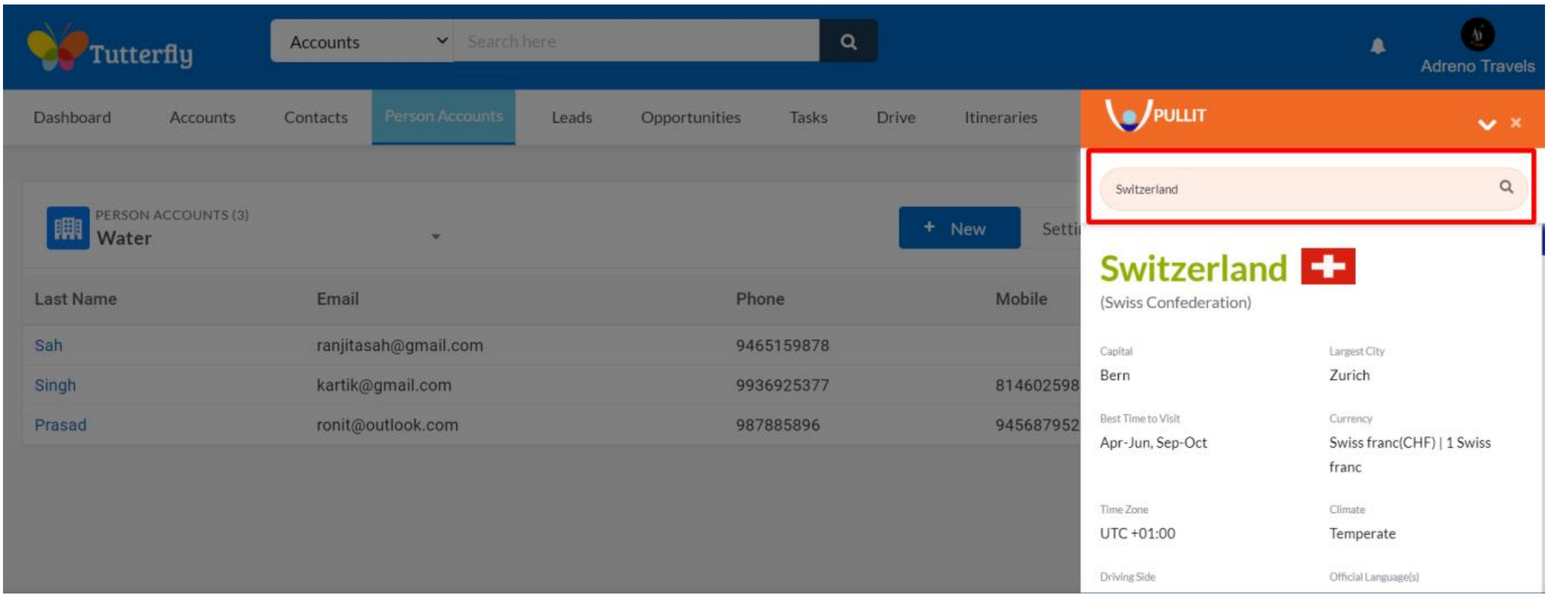
• Pullit:

Pullit is a centralised database repository of tourist attraction that covers all the worldwide countries, destinations, their Poi, with related activity and experiences.

Step1 – Click on the extreme top right corner.

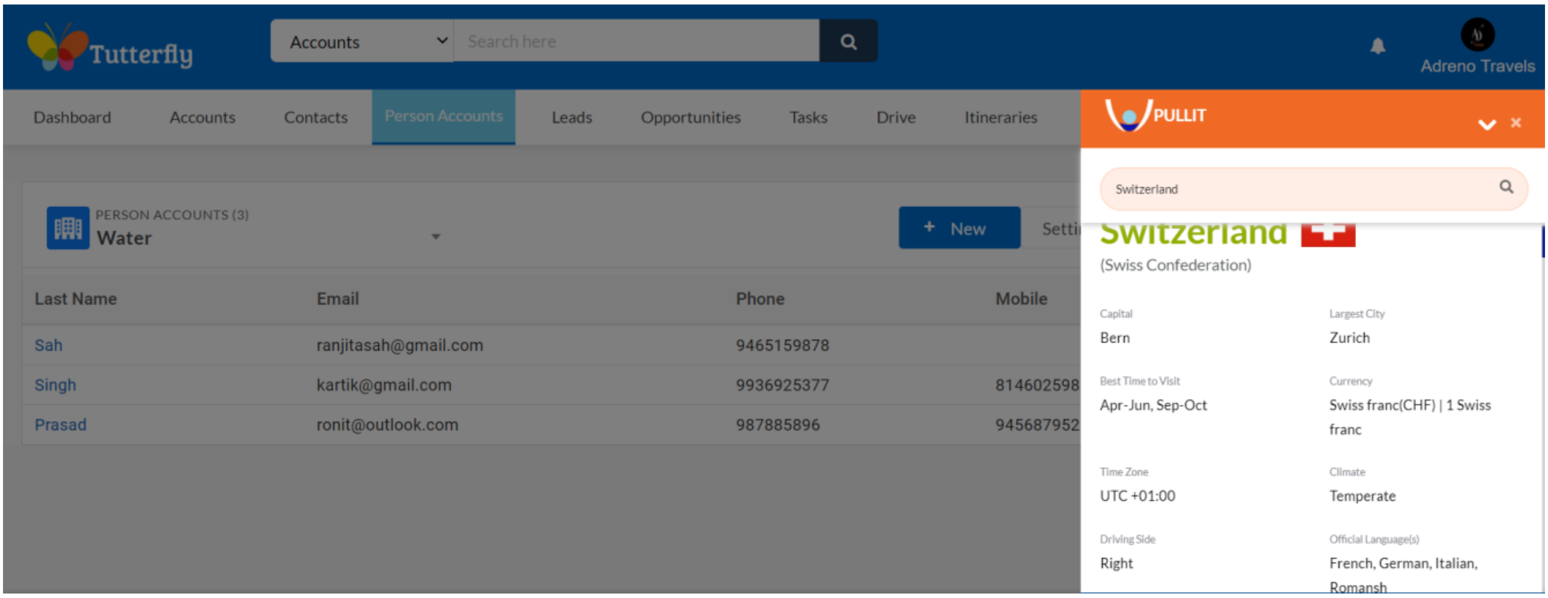


Step 2- Type the location name in the search bar:



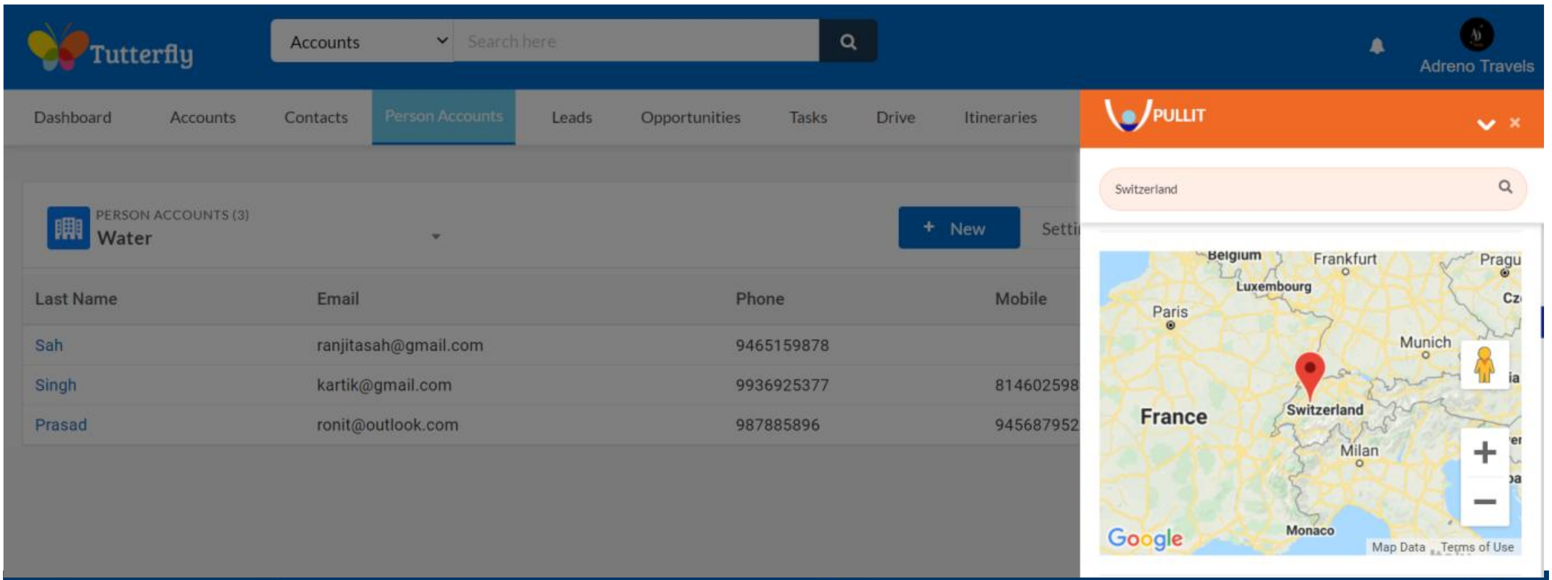
Information about the country will pop up in this manner.

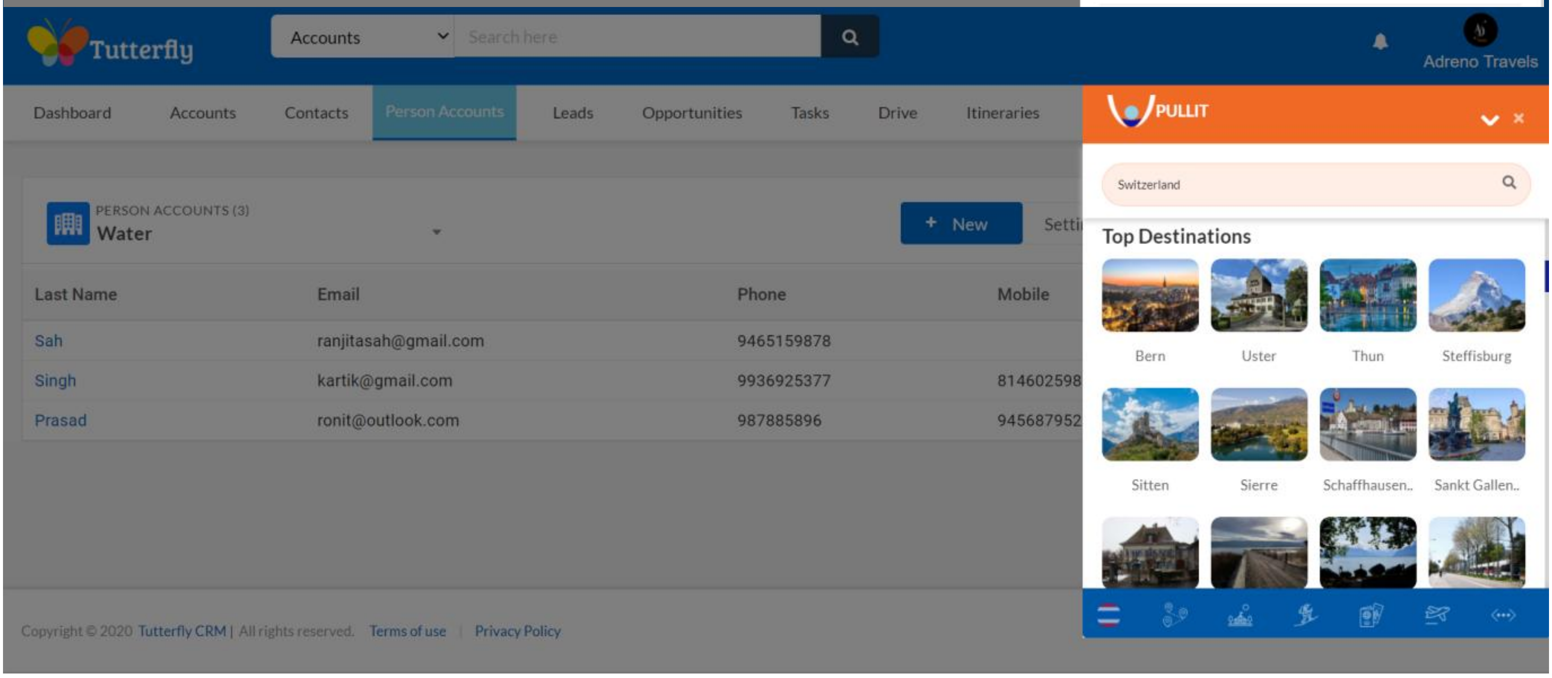
Country:



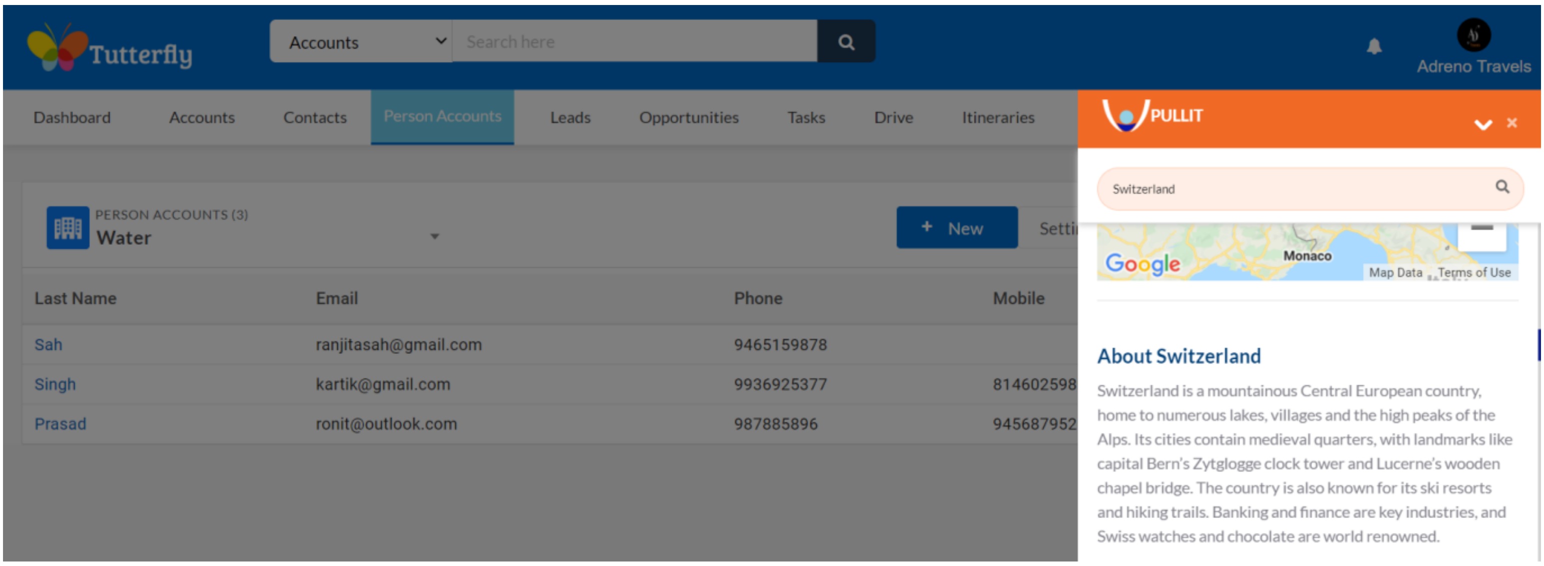
Destinations:

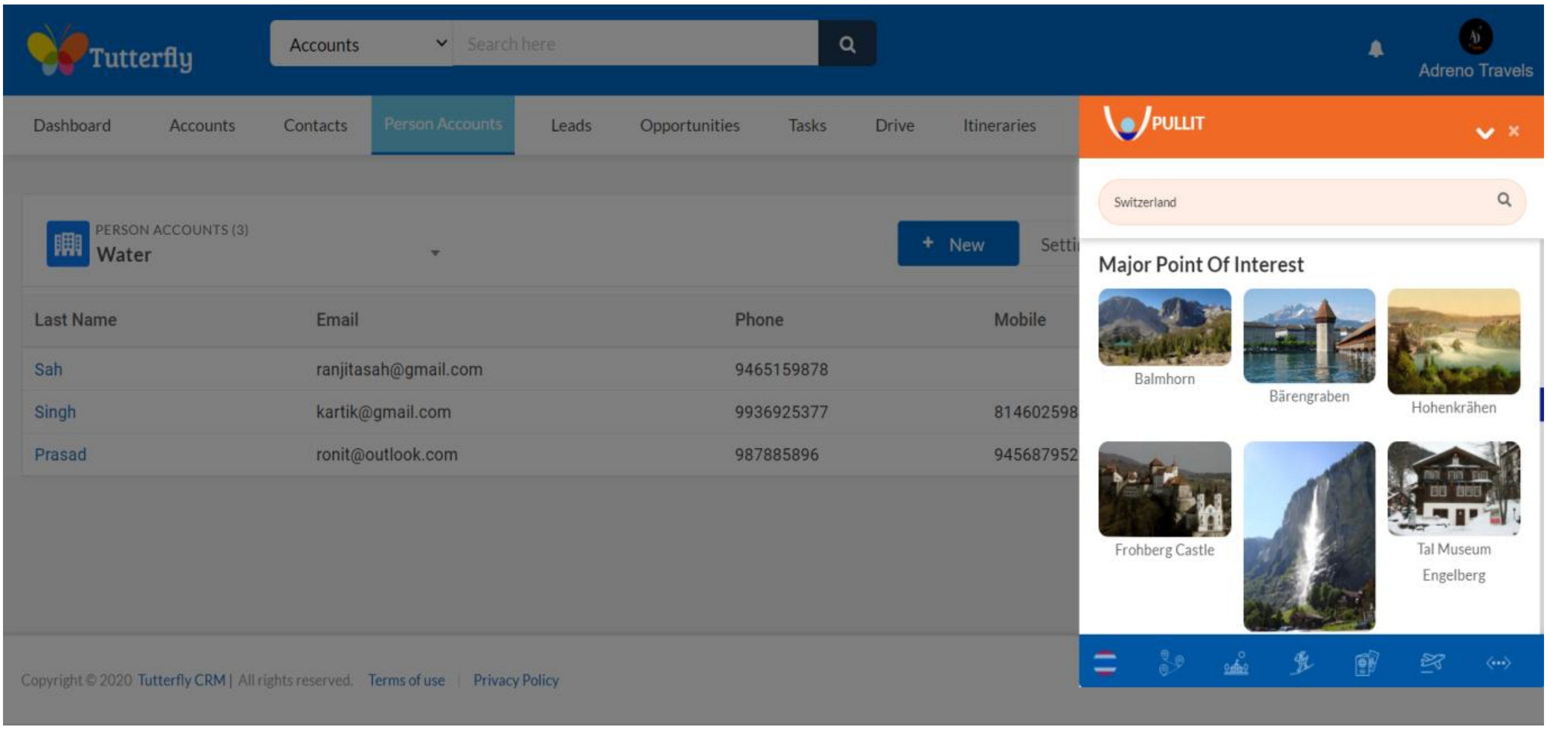
Map:



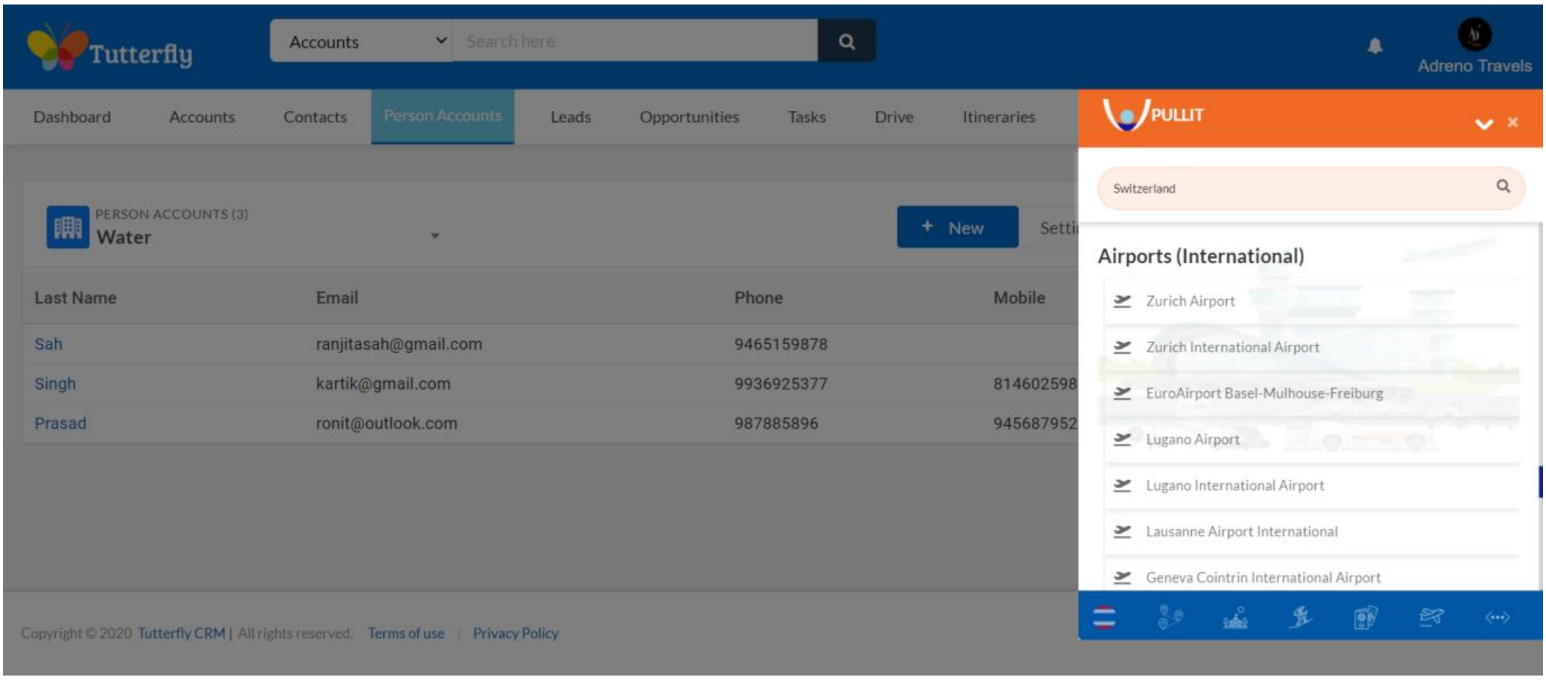


Information about the country with major point of interest:

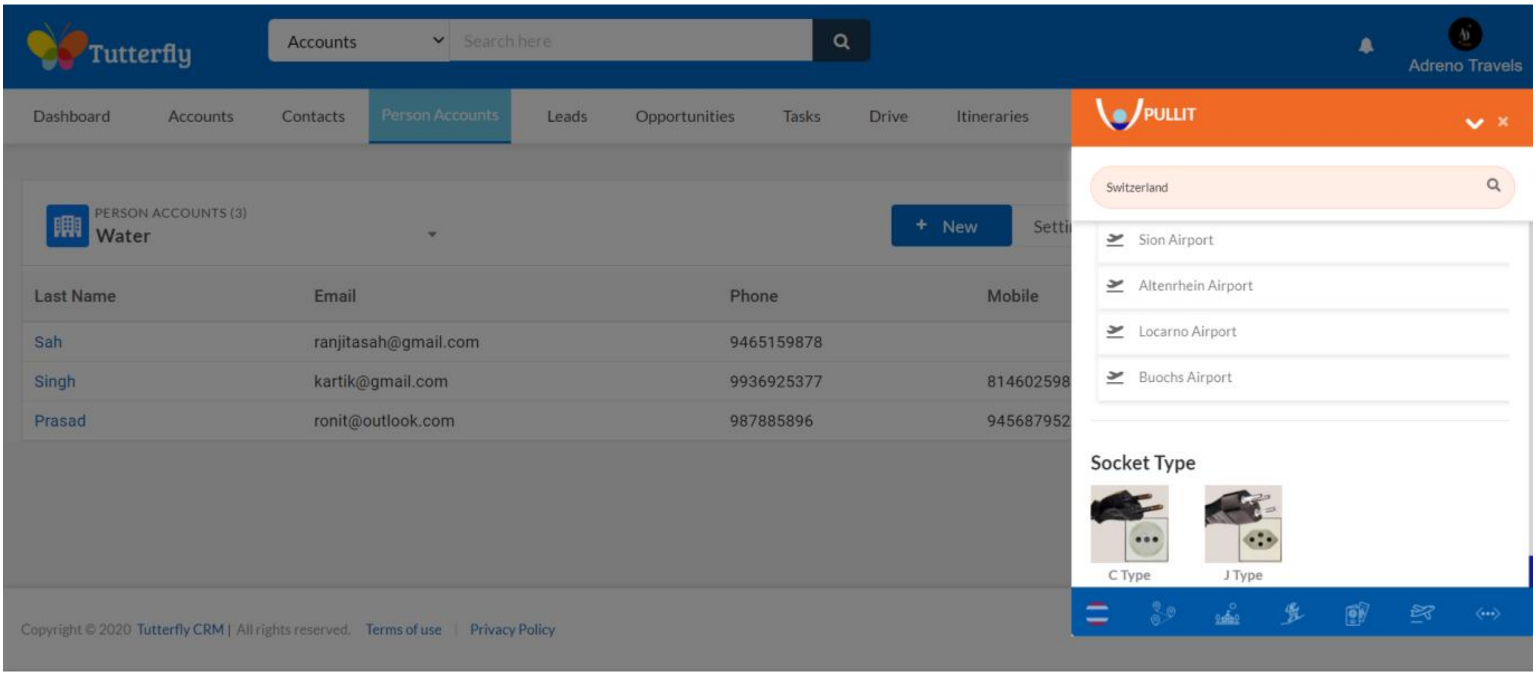




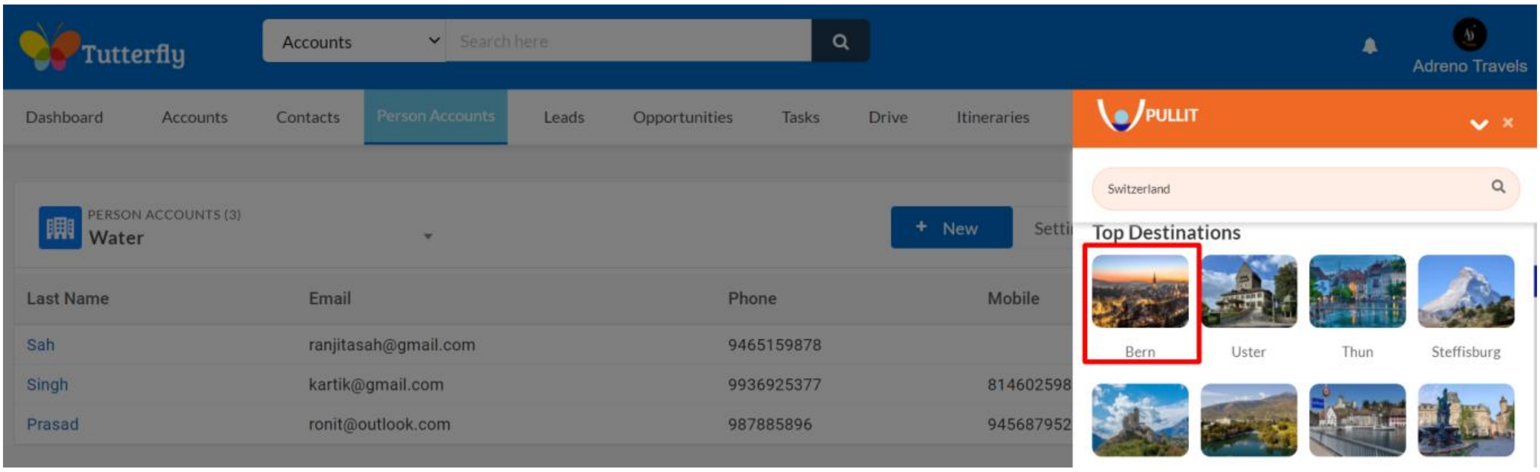
All the international Airports:



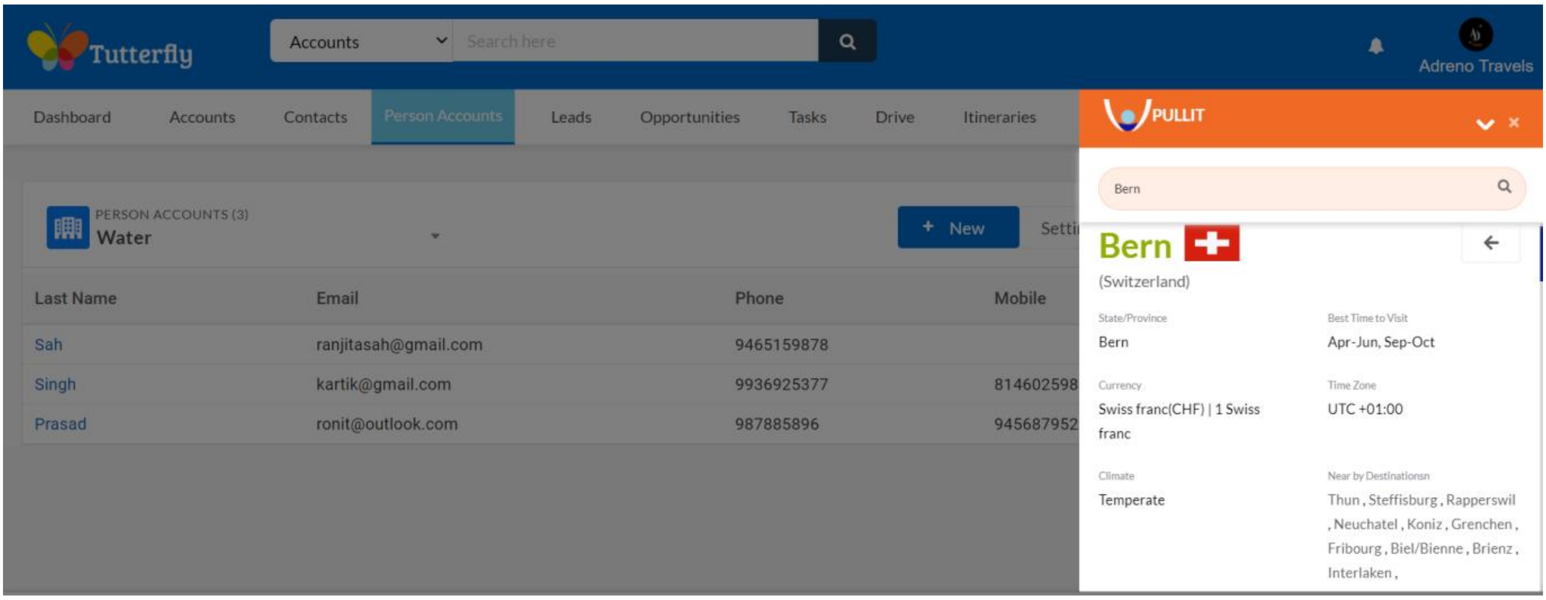
Socket type:



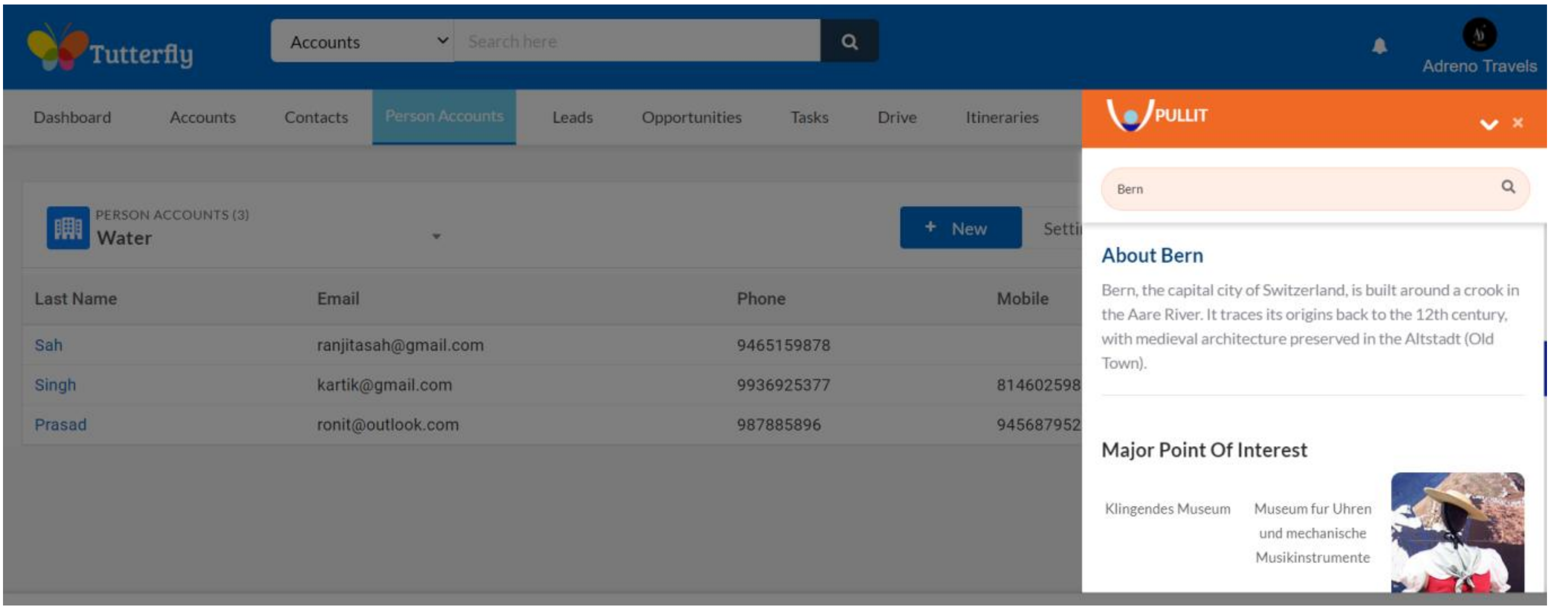
Now if someone wants to get the info on one particular destination, in this case, Bangkok. Just simply click on the destination.



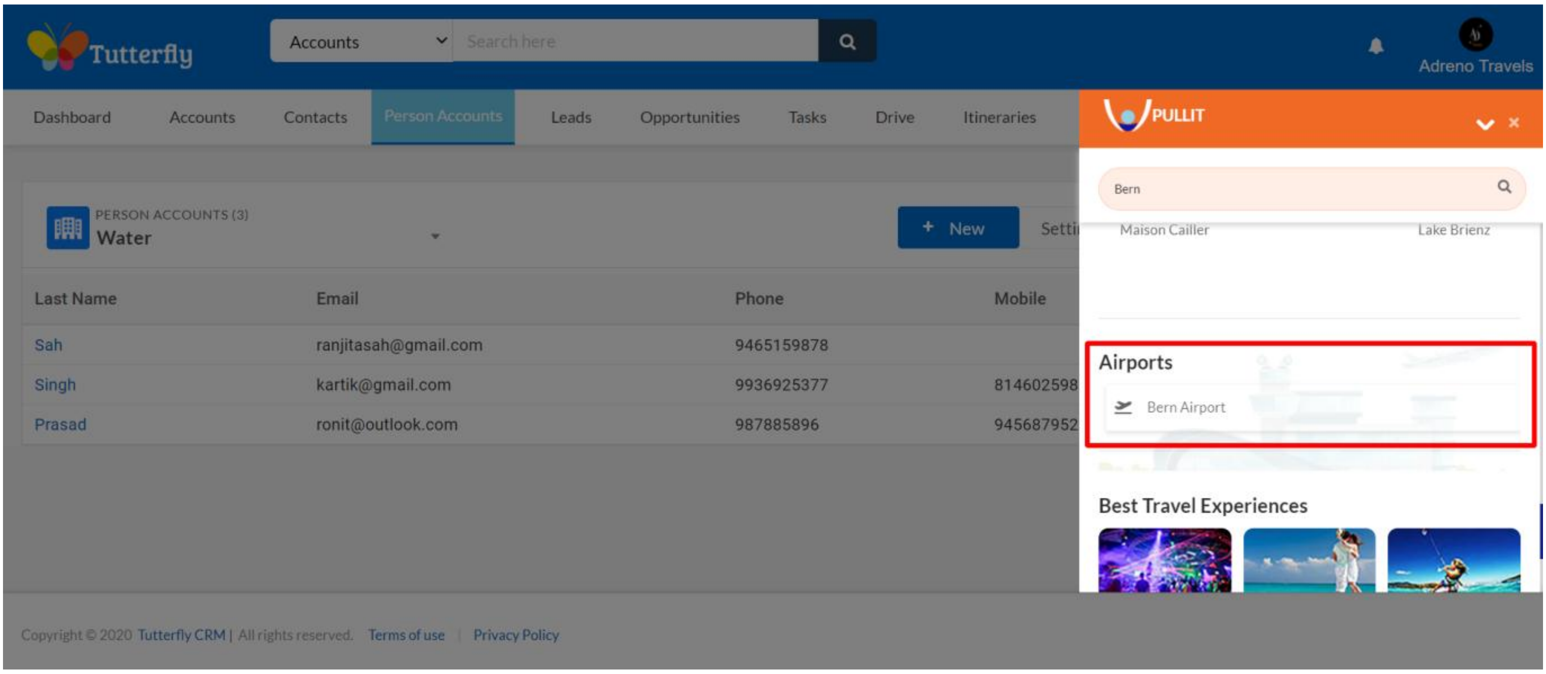
Information about the destination will pop up:



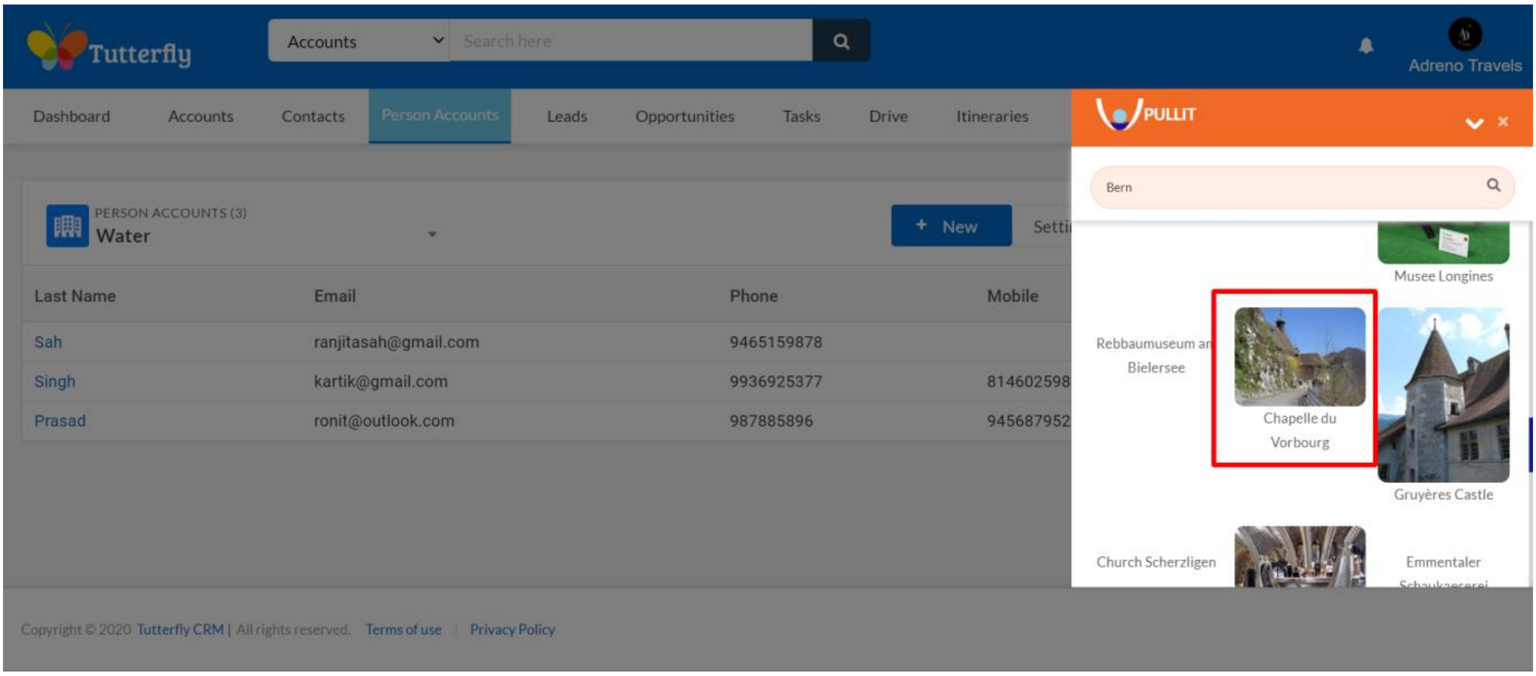
Major point of interest will also reflect:



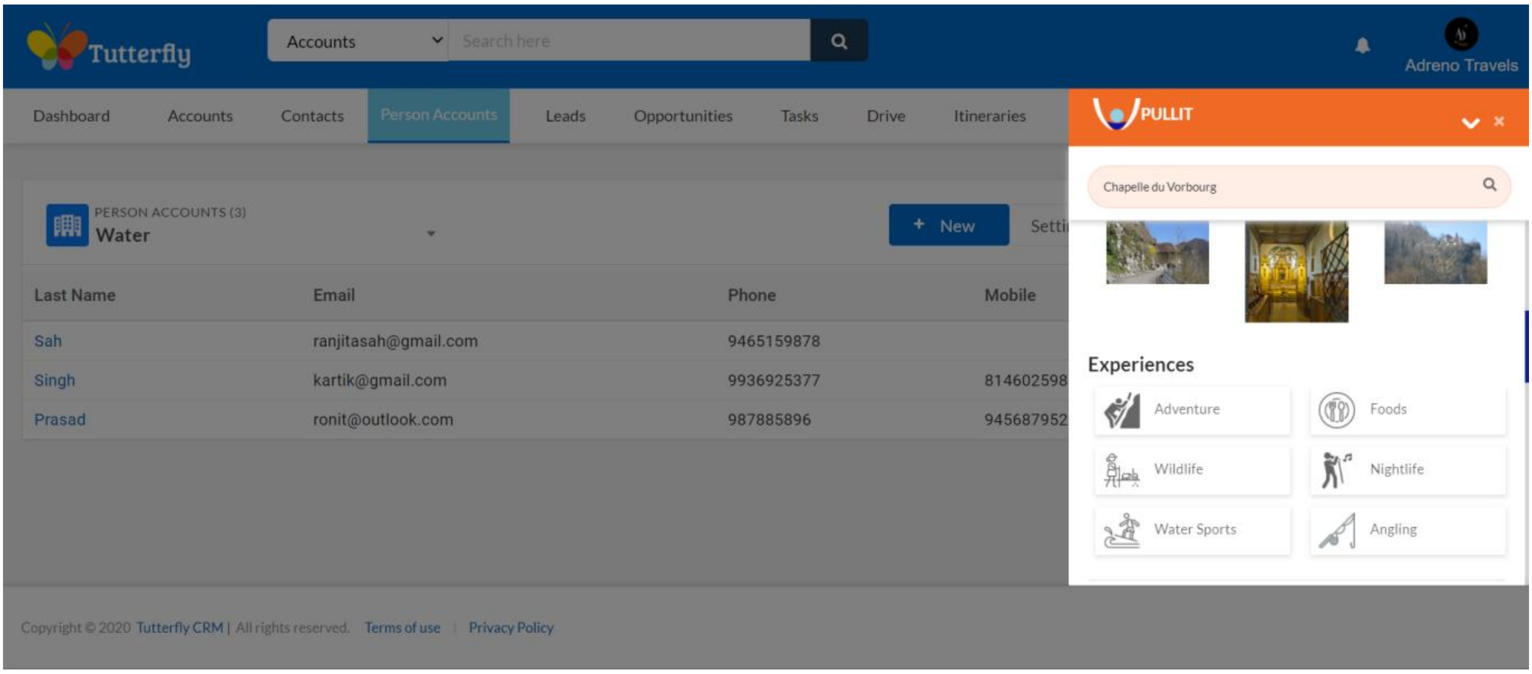
International airports:



Now if your clients are interested in one particular point of interest then you can just simply click on that point of interest under destination:



Information on that particular point of interest will pop up:



Benefits of tutterflyCRM:

Benefits of TutterflyCRM for your sales team Your sales team can immensely benefit from Tutterfly CRM and below mentioned points will clear it up for you.

Complete Sales Software CRMs are complete sales solutions that give businesses with the facilities they have to form the foremost of their product or service sales. Since CRMs are designed in and of itself, they superb for every kind of sales solutions. They not solely supply sales protocols that are extremely economical however a number of different facilities similarly.

Since all the processes within the CRM are integrated representatives will build fast work and find additional volume. this may directly impact their own method and therefore the total output you'll generate. The new staff and interns will take the code way more quickly. As a corporation, you would like to attain your most and your sales reps will try this best through a reliable CRM answer. CRM solutions also will work for businesses that have a various market to cater to.

Sales Process Tracking

Following your business procedure through the entirety of its stages is significant since it will permit your business to enhance everything. Your representatives are a major piece of your business sales process. With sales process following, your representatives will have enough feedback to develop themselves. They can likewise self-evaluate themselves and better their total lead generation protocols. The business forms consistently hold a mobile methodology relying upon the market. This is just conceivable on the off chance that you track your business procedure adequately and adjust it through the CRM as and when required. Significantly, you will show signs of improvement sales volume and increment brand reputation through a wide range of exercises.

Process Modification

Adjusting the business procedure to suit business needs is innate and important. Without adjustment, you will continue continuing with a similar procedure and obstructing your progress. As a business, it is imperative that you adjust yourself to suit the market. Normally, you have to have a CRM which offers process adjustment alternatives past the straightforward corrective. Along these lines, your business can have a noteworthy favorable position in employing the correct sales experts and group pioneers. A dependable CRM will assist you with accomplishing the business volume you need through procedure alteration.

Performance Review

Checking on the performance of each sales agent is a basic piece of keeping up a decent sales approach. This assessment ought to be occasional and ought to give nitty gritty data to every agent. In the event that you have a CRM which offers inbuilt performance reviewing alternatives, at that point you can do this evaluation without any problem. This normally expands your reasonability as a business group and gives your performance the correct lift.

Utilizing the right CRM solutions, you can likewise perform numerous other key capacities identifying with reviews. This will take into account a point by point audit of the whole procedure which can be utilized by your business over the entirety of its business channels. The entirety of this means your business taking full advantage of your CRM and accomplishing more prominent objectives with the application.

Feedback Loop

Feedback loops from a market performance are exceptionally valuable for sales groups. Organizations need to regularize their feedback loops and make it an immediate piece of the salesman performance reviews. This is best done through the product you are utilizing for your sales and customer management protocols. Normally, utilizing this procedure will assist you with accomplishing a higher work yield with your whole business process. Utilizing the CRM-based input loop, your project supervisors and group leads can build up a far-reaching sales system. At the point when you see this from the serious viewpoint in the market, it is an undeniable bit of leeway that can be of incredible advantage.

Market Insights

Feedback loops are predicated on market insights that renewal however the whole domain is working. If you've got the correct insights from your CRM, then you'll definitely achieve a better sales margin. Ideally, your CRM ought to directly provide some quite market analytics method. Usually, this may be predicated on the feedback method you've got.Market insights serve a key function of sales designing. Combining your external knowledge with the CRM can offer key knowledge of the market. This knowledge will be percolated or drawn all the way down to deliver method modifications across your company.

Competitive Development

Being adaptive is such a vital a part of the business that you simply cannot do while not it. In fact, all of your investments are leading up to the current method. If you are doing not carry on with the stride of the market, that will lead your organization to lag behind others. So, obtaining a CRM investment is that the ideal competitive approach. The most necessary a part of your business method is that the sales team employs a CRM that will assist them scale upwards. This naturally converts some time and energy into the correct market method. It additionally delivers a much more economical overall performance from your sales reps.

Selling Innovation

Innovative market methods are vital for breakout sales seasons. With TutterflyCRM, you'll achieve a much better output and apply your innovative strategy effectively. Your organization can use the CRM you've got to nice impact by assessing however your sales reps do. This may result in further innovation in addition and end in higher shopper development in conjunction with satisfaction ratios. If you've got a dynamic work method, then ability works okay. This mobile approach will yield nice edges once channeled through a CRM. If you're operative through sales reps groups, then you're certain to like this even a lot of as your sales scope will increase. Creating the correct CRM work for you may provide you with a comprehensive sales system that's effective and economical.

Benefits of using TutterflyCRM for travel companies in India

Here are the features that will assist your travel organization if you are using TutterflyCRM in India whether you are in the B2B or the B2C markets, you can achieve higher sales, manage your clients and optimize your business processes.

Unified code

The first and foremost advantage of having a CRM in your business method is that the right of a unified code. Having a powerful CRM code at the bottom of your business enables you to perform several tasks in a very efficient manner. Having single unified software will also enable companies to minimize their business investments. So, whether or not you've got a great deal of capital or not, you'll get into the business, and achieve the best. This is often one in every of the foremost necessary core advantages of CRMs within the travel business.

Reporting Protocols

Reports are a primary side of your business since they show wherever your business is standing. Perceptive reports are necessary for you to operate your business in the best way possible to predicate your selections. CRM-based reports will assist you optimize several aspects of your business. this is often basic to growing your business within the right means and guaranteeing its long-run viability. The right reporting processes in your CRM can even provide you with another major advantage. You won’t have to hire extra financial help and it is also a great benefit for the smaller businesses as they can save a lot of capital in the process. It gives them the opportunity to adapt to their increasing financial needs in an effective manner which makes a considerable difference.

Administrative Control

If you don’t have the tools to regulate your business, then you'll presumably suffer losses eventually. As your business grows, you'll want even a lot of comprehensive Administrative Control. There is high chances that you will lose ground in the market if you do not have a comprehensive administrative control as your business grows, so there is an innate need of strong administrative capabilities in the CRM that will invest in. With the assistance of the correct CRM, you'll find the perfect way to handle your travel businesses. this could assist you produce an efficient business method segmentation and find the best way for you to work your leads. Naturally, through the correct Administrative Control, you'll get rather more from your daily work than you would otherwise.

Leads Management

Dealing with your leads is the main way your business will develop. you need lead the management protocols in your business application. Without this, you can't deal with your leads adequately. This will bring about you losing potential business openings and not getting as much money as you should. Another extraordinary preferred position of CRMs is that you can consolidate leads with accounts and other market factors. This grows and connects to numerous other CRM procedures and aides in the overall company database substantiation. Therefore, you can discover how you got your leads in the earlier month, where you can improve and apply these analyses in live market sales.

Opportunities Handling

Capitalizing on changed over is significant for developing your business in the correct manner. You need top notch openings the board to guarantee your business can keep up to the market request. This necessitates you have solid CRM at the center of your business procedure. Changing over circumstances into real business will enable your organization to make its name as a solid market player. This will help in your general income generation and openings take-up. Normally, you can process more and empower your business to become quicker.

Analytics Management

Correct analytics and detailing procedures will enable your business to accomplish significantly more as you work in the market. Be that as it may, you need the right analytics tools to make things work. Else, you will no doubt not realize how to take advantage of the market powers and where you are inadequate. Both of these variables are significant for the quick improvement of any business procedure. Along these lines, you need a solid CRM that can give you this attractiveness and specialized preferred position. You will likewise need to utilize and apply these diagnostic devices in the market. A CRM that has the right analytics tools to give you the correct bits of knowledge will be of extraordinary favorable position. These devices can guarantee that you are never shy of data that you can use to improve your business processing. You can likewise take a drawn-out view for you the board procedure through market analytics devices. These will assist you with seeing how to improve your general business handling and oblige customers all the more viably.

Account Modules

Management of the accounts is an imperative part of all customer relationship activities. This will affect your travel agency prospects in the long term as it addresses the clients. Having an effective client management process in your CRM will ensure that you make a lot of goodwill. This will help serve your market presence in an obviously better manner and furthermore guarantee more noteworthy lead change. Another incredible preferred position from CRM you can get includes multi-account types. You can make business just as close to personal records. These can likewise connect to one another to profit you considerably more. From this, you can likewise cause increases in your database to further to develop and validate your customer profiles. This, will give an unquestionably more top to bottom perspective on the customer and show your, officials, how to serve them better.

Contact Modules

Contacts are directly linked it to the company and persons accounts. A solid CRM will ensure that your daily work gets much easier. Having a solid contacts module in your CRM will offer you an effective custom contact listing options and also task management features. So if you use the right CRM that you can handle your client and contact related tasks directly from the interface which saves a large amount of time and also records what you did which also enables faster formal processing. With the right CRM contacts module, you can also afford a lot more to contact info and related accounts are available to executives. this will prove very helpful for global businesses and small companies

Business Process Optimization

By now it is pretty clear that CRM can definitely be used for business process optimization. To achieve higher sales goals as a company it is imperative that you are using the right tool. A trustworthy CRM allows you to invest a time in the application which gives you the ability to manage your business effectively. You can achieve a much higher optimization when all the other processes like leads, opportunities and Account Processing are working hand in hand. This enables you to compete with bigger organizations as your business grows bigger than it should be kept in mind that your optimization depends on your use of CRM.

Business Expansion

With process enhancement, business extension and market catch are intrinsic. Also, this is the place your CRM will be generally helpful. It can help bolster your developing business needs. You can ingrain further developed selling forms, your information the executives can be redesigned, information security can be advanced and numerous different things. The entirety of this joins to give you the business value you merit and can bolster your development in the market. This is valuable for organizations of various kinds from SMEs to bigger organizations. Since you have a wide establishment on which you can fabricate your business, this will assist you with becoming greater, adjust snappier and upgrade your business inside and out.

Best Travel CRM for Start-Up Travel agencies

There is an intense competition in the travel domain right now so travel startups definitely need the right CRM which can help them generate a good amount of sales is the most important factor in the growth of business. So, TutterflyCRM has the perfect features and benefits that stock of travel agencies can use for the rapid growth of their business.

Client Relationship Development

Client Relationship Development is a key component in all the best CRMs for new businesses. Truth be told, the product type characterizes its essential capacity. Obviously, all the parts of the CRM straightforwardly or in a roundabout way add to this reason. This truly makes them the best sort of business programming for venture. Presently, on the off chance that you investigate the subtleties of CRMs, you will discover numerous modules which you can utilize. These incorporate contact the executives, account improvement, lead generation and so forth. Analysis is another key component in CRMs since it helps in creating customer connections. Estimation and study have permitted CRMs to move past being a straightforward sales hand-off. They can be an interface for your whole business over all levels. They can assist you with forming and tap into the genuine market potential. Moreover, CRMs can help in guaranteeing that organizations meet their drawn-out necessities without any problem. Customer connections improvement impacts travel organization information aggregation for serving customer needs. Getting rehash business through database stockpiling and customer study encourages brilliant marketing exercises.

Marketing Analysis

Marketing is tied in with understanding business sector patterns and utilizing your advantages in it. It requests precise study of patterns, and competition. The entirety of this is practiced by uniting different analytical tools. Google is a mainstream alternative for advanced marketing and you can make an interpretation of your native analytics to profit your general internet marketing activities. You can likewise have local tools to direct your own database-arranged research. Any quality CRM programming for new companies must have analytical tools. You can likewise have these marketing analysis tools scales with your business. This guarantees you can stay up with a developing business sector or customer base. Normally, you can use better administrations through this showcasing analysis. Further, you can actualize changes adequately over all business parameters. The CRM will likewise empower direct adjustment of sales forms through oversight. This permits analysis and usage procedures without influencing the lead generation process.

Lead Process Integration

Lead processing is the essential work in CRMs. Obviously, how each CRM works truly has the key effect. Not all CRM frameworks for new companies have a similar basic interface or operational action. Their general execution relies upon numerous different factors besides essential ones. Your CRM should convey comprehensive lead processing capacity. This ought to likewise coordinate with your mobile applications or some other convenient programming. Integrative analysis is an absolute necessity. They will guarantee your lead transformation is ideal. This advantages long haul prospects by observing market changes and dynamizing sales. This implies business gets the capacity to develop alongside the market and capitalize on it. With such advantages, your CRM can incredibly expand your lead procedure generation. On the off chance that you have a solid performing CRM, at that point it can guarantee you can streamline your procedure.

Selling Oversight

All travel organizations need a selling protocol review. This procedure is imperative to guarantee that everything fills in as arranged. Cold pitching is the perfect example why oversight is valuable. With selling oversight, a CRM can permit you to show signs of improvement business by permitting attempt to seal the deal surveys. On the off chance that you can guarantee selling process enhancement, at that point you can get the most extreme incentive from the market. A quality CRM for new businesses allows team leaders in developing employee performance profiles. Further, selling oversight guarantees dynamic business handling. A key component here is adjust to changing business market trends.

Contact Management

Contact Management is a significant part of the best CRMs for new businesses. To develop the travel business within the client markets networking can be the best way. The most astute approach to do this is to pitch custom packages to them. CRMs can help in doing this by keeping up contacts on hand. Keeping up contacts associated with full customer profiles and demographic database is the most ideal way. This will take some time to grow however it will profit your company in the long run. Contact management can also be based on access restrictions. Your company will not have to face legal liabilities and information leaks if it is ensured that the client information that also includes the financial information is protected. This makes it possible for the users to effectively access data. This in turn leads to enhanced conversion potential and marketing pitch customization.

Database Management

All travel organizations need a solid database to work with. You can acquire information about your target market through external sources like third-parties. For online marketing, using Google and other sources is critical but you also need your own native database which will be your primary information framework. For new companies, building up a database is confusing. So, you ought to put resources into a solid CRM which can bolster this effort. There are normally two choices for information stockpiling between on-drive and cloud-based. On-drive facilitating offers better assurance to information while Cloud is simpler to keep up. You ought to pick the one that works best with your CRM programming for new companies.

Set up organizations can likewise profit by CRM database features. With a database within reach, you can pitch considerably more adequately to the market. Individual profiles give key subtleties to solid conversion ratios on cold

calling processes. Further, if you have a well-defined database, then you get better repeat business. This combines with an overall compelling performance and delivers high-value output.

Recall and Repeat Business

Brand value generation is anything but a typical profit by any best CRM programming for new businesses. In any case, in the event that you have solid lead generation software, it does extensive brand building. Further, on the off chance that you have a well-defined database, at that point you will get better repeat business. This joins with a general convincing presentation and conveys high-value yield. Building up a solid market presence requires building your reputation. Normally, with a database-incorporated CRM, you can set new client service standards. This will affect your attractiveness and standing with other CRM forms.

• For Inbound tour operators:

TutterflyCRM facilitates creating itineraries, managing customers and travel agents, fully automates sales process, manages accounts and provides comprehensive insights into your travel business.

A. Easily add travel inclusions- Hotel, Air ticket, Visa, Airport transfer.

B. Improve group management efficiency - completely manage group travel processes from itinerary Creation to comprehensive profitability reports for each group.

C. Creates tours and departures - Create packages or tours by combining different travel components previously created in TutterflyCRM, TutterflyCRM saves time by using old departures saved in world format in the drive module.

D. Centralize communication with your customers - Use the powerful 2-way email communication system to successfully liaise with customers and suppliers. Communication from a standard email application can be synced in TutterflyCRM. Browse through a centralized history of email communication for each reservation or customer.

• Outbound tour operator:

A. Excelerate sales with tutterflyCRM - Everything you need to manage customer profiles and communication with your customers. Get insights into every customer or supplier.

B. Quote fast - Save your time by quoting and invoicing customers faster. Send beautiful,fully customized travel itineraries with photos and descriptions to customers.

C. Customer purchase history - Get detailed information on previously created opportunities for each customer and a better understanding of customer behavior. Use reports to find the most lucrative customers and direct marketing efforts towards them.

• Destination management company (DMC)

TutterflyCRM helps you manage group travel, customers, and travel agents, while fully automating Sales process, improving services, managing accounts and pro-viding comprehensive insights into your Travel business.

A. Manage customers and travel agents- Keep records on customers and travel agents in the tuttrflycrm . Use the White-Label feature showing the brand names of your company.

B. Assign Opportunities to specific employees- Appoint opportunity to specific employees and track their ongoing status. Get a clear overview of each assigned, as well as the unassigned opportunity.

C. Create follow up tasks- Create follow up task to remind the employees of their tasks.

D. Complete sales automation – Received query- Proposal/quotation – Negotiation – close won-close lost.

E. Centralize communication with suppliers- Use our powerful two-way email system to successfully communicate with suppliers. Browse through a centralized history of email communications for each reservation or customer.

• Travel agencies and OTA

A. Create appealing descriptions- Reach global customers with destination descriptions. Upload multiple photos at once for all of travel products. Use our web API to search point of interest.

B. Organise rooming, hotels and flight lists- Organise departures and arrivals of passengers. Create rooming, transfer, flight and hotel list.

C. Easily add travel products - Add travel products such as accommodation, packages, en-trance tickets, excursions and other activities, transfers, rent-a-car, vessels and cruises.

Tools of trade from Wat consulting services:

WAT Consulting Services is a top-of-the-line travel software development company which delivers top-quality products. As a dedicated technology firm focused on travel domains, we are a leading authority. We currently have five major software in the market, each with their own benefits. They offer great value to both growing businesses as well as SMBs.

1- TALK **2- JauntFix** **3- Adboek** **4- Mailracks** **5- TutterflyCRM**

• TLAK:

Managing travel operations has never been simpler. TLAK permits tour administrators to make and oversee tours most productively and adequately. TLAK is made keeping in mind all the basic highlights that make the tour creation and the entire travel process simple for the tour administrators. TLAK gives one of kind chances to tour administrators to draw in their customers more and in a superior way and remain associated with them significantly after the culmination of the tour. TLAK gives a large group of highlights that will give you an edge over other tour administrators or organizations.

The hardest part of the travel business is to deal with the everyday operations when the real tour is taking spot. Indeed, even the best-overseen tour upheld by extra tour chiefs may get muddled. One can never recognize what may turn out badly regardless of whether all the 'factors' are being overseen expressively. What the travel business requires is to minimize every single obscure factor, arrange the operational procedures ahead of time, and streamline all exercises involving the traveler during the tour days. Our response to this perfect situation is TLAK.

TLAK is genuinely a DIY application as you simply need to follow the means and make a tour without anyone else or with minimal assistance. All the travel operations can without much of a stretch be overseen and handled through TLAK in a problem freeway. All these extraordinary highlights anticipate you in TLAK, and you can profit by them at an exceptionally minimal effort. You can attempt the application first and then use it when you feel fulfilled, at that point you can pay and use it. TLAK is progressive tour activity management application that was made explicitly keeping in mind the requirements of the travel business proprietors and destination management organizations, using it won't just increase your proficiency, managing the general travel operations yet will likewise increase your income.

TLAK and its superb versatile application:

TLAK is an application for anybody in the travel business who needs to succeed and needs to see their business develop. This is the quintessential application that enables you to make and deal with a tour from the earliest starting point as far as possible and significantly after that you can contact your clients when the tour has finished. It will help you in reducing time and Manpower spent in managing the travel procedure. You can make destinations, including all the travelers, transfer the travel archives, and a ton of highlights that you can profit by when you use TLAK.

Versatile applications have come as a rescuer for organizations to spellbind their customers. The TLAK Mobile App causes you to widen your business, customer care and promoting your brand through our foundation where you can charm your customers. We appreciate this essential and along these lines, we have a submitted gathering of specialists for versatile application improvement for travel business. TLAK gives you the remarkable capacity to oversee and handle all the travel forms at a similar spot. With the portable application which is accessible on Android just as iOS, you can keep your clients connected consistently.

Here a few of the notable features of TLAK:

Alerts and Notifications

The tour administrators get can profit by multiple sorts of alerts and notifications that permit you to remain associated with the customers or contact them at whatever point you need.

On application Collaboration

With this element you can keep your customers connected as they can share pictures and message individuals on their tour. This likewise permits them to remain associated with the tour administrator and operator.

Integrated hotel list

Adding hotel information with TLAK's integrated hotel list highlight is easy breezy as every one of that should be done is entering the name of the hotel and selecting it after which all other info about it naturally refreshed.

Clutter-free documentation

All the travel related records of the travelers can be transferred and gotten to whenever in the TLAK versatile application. When spared every one of these archives can even be gotten to even offline.

Detailed itineraries

You can make detailed Day-wise itineraries giving the total insights regarding the action of every day of the tour. This will likewise include the inclusions of each specific day.

Track multiple tours in real-time

With TLAK you can track the advancement and area of multiple tours all the while. This permits you to remain refreshed with the tour consistently.

Accessible Map

An amazing component of TLAK that gives information about close by areas of point of interests, similar to Transport, Restaurants and Shopping focuses.

Alerts and Notifications

The tour administrators get can profit by multiple sorts of alerts and notifications that permit you to remain associated with the customers or contact them at whatever point you need.

Pay and use

TLAK gives you the incredible advantage of using the total highlights of the Software and application without making any payments. You can make total tours without having to pay a dime for it. This gives you an extraordinary preferred position over other tour management and helps applications as you can use all the highlights and make the tour and change it to your heart's content. Until this point you don't pay anything, you possibly need to pay when you choose to make the tour live.

White Label application

TLAK is one of only a handful of applications in the travel domain help and management domain that are White-labeled. This empowers you to use our foundation as a method for showcasing your own brand. Every one of your customers using the TLAK application will see your logo and brand when they use it. This will advance your brand and drive more individuals to use your administrations.

Detailed itinerary developer

This is of the main highlights of TLAK, which permits you to make detailed and far-reaching itineraries. You can give the total information on the exercises that will be included for every day of the tour. This Is exceptionally useful as it can give a striking portrayal of the exercises to the travelers, which gives them an insight into the day and make expectation. They can get information beforehand about the spots they are to visit. You can even include the inclusions and avoidances of every day. TLAK is the ideal amalgamation of the considerable number of highlights and the innovation that will permit all the travel business owners to streamline their business operations and increase the effectiveness as it were. TLAK has unlimited advantages for the business proprietor and the best thing is that you can use TLAK for free, as you get to all the highlights. You possibly cause the payment when you feel that you are prepared to enact the tour. In this way, use TLAK now and give yourself the genuinely necessary edge over other travel businesses.

• JauntFix:

JauntFix is a social travel application that offers answers for travelers and travel suppliers to connect. Our vigorous versatile application works impeccably for travelers and travel suppliers to get refreshes, data takes care of easily with a large group of cutting-edge highlights. Travel suppliers can market their items and administrations with eye-catchy pictures and rich substance. Travelers can find energizing travel bargains, most recent administrations, offers, and promotions. It is a free all-in-disentangled Travel App that allows posting and sharing of photographs, recordings, agendas, and tour bundles on a solitary versatile stage. The application gives end clients accommodation by letting them interfaces legitimately through moment talk which can improve proficiency. Our application is intended for all caring travelers and travel suppliers, for example, tour operators, travel specialists, hoteliers, aircraft, guides, and other specialty travel suppliers. JauntFix is a social media supernatural occurrence for travel organization operators. It conveys a magnificent performance and an open door that can assist you with accomplishing the most ideal social media marketing. As an application for travel operators, JauntFix empowers you to get to all significant social media platforms and post your substance on them. It is likewise an independent stage with a quickly developing number of profiles. This application can be gotten to by travel specialists, travelers, and all different experts in the middle. This makes JauntFix an incredible application for tour operators and all sorts of tourism-related experts.

It's all systems go for JauntFix as the social travel application gets steam and makes advances over the world. A great deal of careful work has gone into innovative work with the point of offering ascend to a stage that will interest travel item suppliers and purchasers the same. While the application is getting rave reviews from clients, the JauntFix group is as yet taking a shot at improving the usefulness of the application through fixing bugs and utilizing client proposals. This implies we plan on taking the application forward as a client-driven stage that looks to meet the client's ever-expanding and evolving requests. Various estimates have just been set up to make this methodology a reality. In this piece, we Explore the Road Ahead for JauntFix Travel App.

A few of the highlights of Jauntfix are:

Sequenced Posting Options

Having coordinated posts on your social media travel application can be an incredible assistance. You can succession media posts dependent on your marketing and afterward post them. This allows better marketing management in only a couple of snaps!

Review Post Performance

The performance of your posts matters a great de al in the event that you need to develop more. JauntFix gives you access to all your social media post performance investigation. This can assist you in showing signs of improvement at marketing even in a hurry!

Ensure Market Competitiveness

JauntFix gives you potential access to heaps of industry contenders and their social media ac-counts. You can improve your social media competitiveness by taking a gander at their marketing pitches and improving!

Zero-Cost Social Media Promotion

JauntFix is an application for tour guides that allows travel specialists to advance their business contributions with no cost over numerous platforms. You can cause your business to develop across numerous platforms without requiring any cash.

Sync All Media Platforms

It is elusive a solitary stage which can dedicatedly give your travel office dish social media get to. JauntFix is an application for travelers that does that easily and empowers you to get to each social media whenever anyplace.

Social Media Contact Management

Ever needed to control your crowd with social media? As a social travel application, JauntFix can allow you to specifically focus on your contacts and convey an engaged marketing drive. This will help in change improvement too!

Top of the Tech Tree

A social media marketing miracle **JauntFix** conveys a top of the line stage for encouraging all your social media exercises. It is a solidified medium that can assist you with accomplishing the most extreme incentive from your social media profiles. It incorporates all significant platforms and allows you to make various travel application posts with only a couple of snaps. You can likewise glance through your social media performance and ensure you can contend adequately in the market. Get the absolute best-committed tourism social travel application in the market!

Worldwide Coverage

JauntFix conveys an extraordinary application experience that joins quality social media access with disentangled capacities. The application for travel operators ensures you can cover all your customers and rivals are only a couple of snaps away on social media. Further, it allows you to market all over the planet. At present, the travel application is quickly making moves in the travel and tourism market globally. On the off chance that you associate with experts in your objective locale, you can market to the two crowds just like other tourism organizations. This makes getting full profit by social media a matter of a couple of snaps. Presently you can market like a genius without investing a lot of energy in it!

All-in-One App

JauntFix is an all-in-one application that can make your social media marketing strategies significantly more brilliant, smoothed out, and complex. This application for tour operators consolidates the best of all social media and committed specific assets for the travel space. Along these lines, you can discover not just travel specialists, offices, consultants, suppliers, tour operators, travelers yet besides a wide assortment of others here. Basically, this allows you to approach right away build up a solid system of expert contacts. Further, you can work together with them employing social travel application postings to give business potential. Well that is the most ideal way you can market your travel business for nothing!

JauntFix is a straightforward, successful, and all-incorporating social media answer for travel organizations. It conveys all the highlights you would need in your social media application without being excessively substantial. It additionally gives an independent social media application for travel suppliers alternative which you can use to interface with different experts.

A few notable features of Jauntfix are:

A. Multi Social Media Platform Syncs

B. Profile Management

C. Planned Posts

D. Post-Performance Analytics

E. Market Competition Overview

All of these highlights offered by JauntFix make it an incredible application for all sorts of travel organizations. Organizations, travel business owners, and tour operators can profit enormously from utilizing JauntFix to advance their business. In the event that you need to capitalize on social media application for tour guides for your travel business, give Jauntfix a try for absolutely free now.

• Adboek:

Adboek is a smart contact management app which delivers high-end contacts handling features to clients. This app has been built specifically for travel business owners who want to get a customized contacts app. As such, it has many specialized features which can help you get quick access and manage your contacts inventory. It also offers some very important additional features like sync in with other key travel contact apps to deliver a wholesome experience.

You get to access all your contact details exactly how you want it. With a fully customizable interface which allows you complete freedom, your contact management is a breeze. We also have several templates based on your specific travel address book domain service area.

Key features:

Memorized History:

Aside from various call history tracking features on travel agents directory, Adboek also offers synced in call record options. This can help you save conversations for future use and make the most of your on-phone business multitasking!

Customized Interface:

From visual style to available access buttons, Adboek offers a completely customizable interface. This feature allows you to get the best accessibility features from the travel contact app without making any effort at all!

Pro-Tier Contacts Directory:

Adboek is a smart free travel directory which delivers a great experience to users. It offers fully customizable interface which can help you call your collaborators is just a click away now!

Techtastic Technology:

A Pro Contact Management App

Adboek is a new type of contact management app which delivers exceptional performance and ease in a few clicks. You get to access all your contact details exactly how you want it. With a fully customizable interface which allows you complete freedom, your contact management is a breeze. We also have several templates based on your specific travel address book domain service area. This will help you arrange your contacts, access them and sync Adboek up.

Great Accessibility:

Accessibility is at the heart of Adboek. This feature was kept central because we wanted to create an easy-to-use app which delivers everything you want. Since we focused specifically on the travel domain, we also customized the accessibility features based on specifics. So, you can choose to categorize the app's home screen tabs based on contact type, regularity of calls, special case numbers, regions etc.

Versatility:

Versatility is another major defining feature of the Adboek free travel directory app. We wanted to cater to all kinds of travel industry professionals. So, we introduced various modes in which the app can be used. Tour operators get a separate mode setting to work with where they can organize travel agents and individuals travellers. Same goes for all kinds of travel agents, suppliers, transportation businesses etc. This allows Adboek to cater to a wide range of professionals who work in the tourism industry. It also means your entire business can have one consolidated contacts directory to contact each other with.

Adboek is an intelligent contact management app which delivers unparalleled performance for travel business operators. It also ensures that you can access the accounts you want when you want by allowing you customization options.

• Future integrations:

As enterprises generate and collect more data than ever from various data sources, the need to aggregate all the data in one place to extract value is growing. This is where data integration software comes in handy. Data integration software lets enterprises combine, manage, and understand all the data from multiple sources in one single platform.

Armed with data integration software, enterprises can make sense of the data, through analytics and statistics, and make better business decisions. Wondering how exactly beneficial data integration software could be?

The Benefits of Data Integration Software

Let's look a simple example. For instance, if you're a tech-savvy marketer, data integration software allows you to pull together large volumes of data from marketing operations software, sales system, web traffic, CRM platform, and customer success system (just to name a few). It saves you time and minimises errors in logging in and out multiple systems to manually put together and analyse all the data. It enhances collaboration across various departments. And above all, a unified view of data offers you valuable insights you can instantly act on and deliver results.

TutterflyCRM Integration

1. Zapier

Zapier is a data integration and automation software that allows users to integrate web applications (thereby, data), automate workflows, and get more works done. Users can integrate more than 1,000 web apps such as G suite, Microsoft office suite, Zoom, Slack and

Quickboxes and seamlessly move and share information and data across apps.

2. IFTT

If This Then That (or **IFTTT**) is a free, web-based application that enables users to create automation chains between other applications and web services such as Facebook, Google Drive. Each automation series is referred to as an applet, which performs a specific chain of events within your apps. There are currently around 54 million IFTTT applets that can be used to connect multiple apps with automated tasks.

Thank You!