Adventure Overland Discussion Points

1. Predefined mail according to destination selection sent to client automatically.
2. leads capturing from all sources auto assignment according to destination wise.
3. If assigned operation person went on trip (for few days) other person will be assigned at his place. ( auto assign one time , then can be change manually.
4. leads can be through Facebook , website will come to CRM. (API )
5. Suppliers payment update from CRM.
6. Fix departure booking report (format to be shared by client)
7. Daily booking report (format share)
8. Expense entry against booking (info to be shared by client).

Discussion with Mr Amit Kumar and Dinesh Sir

1. Lead Capture API integration:  
    Facebook

Instagram

Website

1. Fixed Departure changes, to capture lead from website.

(Will give option to define operation person, package URL, Auto reply template)

1. Supplier payment report (Format to be provided)
2. Fixed Departure Daily Movement chart (Format to be provided)
3. Expense → Query related expense handling (Flow is to be provided with sample report)