Travel Shravel CRM — Complete Department-Wise Specification

Objective:

Build a modern, lightweight, web-based CRM (preferably hybrid that can work even offline on mobile and web both) for Travel Shravel. Clean, user-friendly, mobile-responsive, and accessible from any computer in the network. Each department has role-specific users, with Salespersons restricted to the Sales module.

1. General & System Requirements

a. Query numbers prefixed with TSQ, starting from TSQ1600.
b. Initial services: Tour Packages, Hotel Booking, Air Ticket Booking, Taxi Booking, Travel Insurance.
c. Initially limited destinations (e.g., Jammu, Dubai, Toronto), but system must allow adding new destinations/services.
d. Modern, light-themed UI; easy for non-technical staff.
e. Accessible from any computer in the network.

2. User Roles & Department Access

A. Admin
  a. Full access across all modules: Sales, Accounts, Operations, Post Sales, Delivery, HR, Incentives.
  b. Can manage all users, assign roles, rename Salespersons, configure system settings.

B. Salespersons (Sales Department only)
  a. Access only the Sales module: lead management, remarks, follow-ups, assigned leads.
  b. Cannot see cost, profit, or detailed delivery info. But should be able to see only the stages of the booked lead.
  c. Can edit the sales cost as and when required. (it shall be required in the case - Guest have booked the package and booking get processed. But before the travel date he may wants to add some more activities to it’s existing booking.)
  d. Can view earned incentives but profit and cost remain hidden.
  e. Can assign/reassign leads if granted permission by Admin.

C. Accounts Team (Accounts Department only)
  a. Access Accounts & Payment module and Cost Price module.
  b. Can view/edit cost components and payment info.
  c. Can see profit calculations.
  d. Cannot access or modify Sales module or Delivery module.

D. Operations Team
  a. Receives leads once marked Booked.
  b. Manages service execution (hotel/ticket/visa bookings).
  c. Can only work on leads that are marked as Booked.
  d. Cannot edit price value entered by sales person. It can add & amend nett cost as and when required, so he can get the idea if the booking is in profit or loss. It must assure that the booking does not run into a loss.

To amend, admin approval is required. If booking is in loss, approval of admin is required, without the approval of admin, no one has authority to process the booking.

e. Must log internal notes for each booking (visible to Admin & Operations only).

f. Can see:

   i. Selling Price (to know client's final deal value).

   ii. Net Price (Profit = Selling – Cost) (to avoid loss-making mistakes).

   iii. Cost breakdown entered by Accounts.

g. Updates operations status (Pending → In Process → Completed → Vouchered).

h. Adds internal notes for tracking.

i. Cannot edit payments or change lead ownership.

j. Cannot export reports (view-only access on profit).

k. Cannot proceed until Post-Sales marks documents as received.

l. Must notify Admin if documents are missing or incorrect.

E. Post-Sales Role

Cannot mark operations or delivery as complete

a. **Client Coordination**

   i. Contact clients after booking is confirmed.

   ii. Ensure clients submit all required documents (passport, ID, visa forms, photographs, insurance details, etc.) on time.

   iii. Send document checklists and reminders to clients.

   iv. Track pending vs received documents in the CRM as per the checklist added by the admin.

   v. Responsible for reminders to clients about missing documents.

b. **Operations Coordination**

   i. Share collected documents with the Operations Team so they can proceed with ticketing, visa, and service bookings.

   ii. Follow up with Operations if any document is missing or clarification is needed.

   iii. Act as a communication bridge between client and operations.

   iv. Must share collected documents with Operations for smooth processing.

   v. Cannot approve or reject service fulfillment tasks but can raise alerts if documents are incomplete.

c. CRM Access

   i. View all Booked Leads.

   ii. Upload/mark documents as Received / Pending.

   iii. Add remarks regarding client document submission.

   iv. See Operations Status (Pending / In Process / Completed / Vouchered).

   v. Cannot view cost price, profit, or financial details.

d. Notifications

   i. Get alerts for document submission deadlines.

   ii. Notify Operations when documents are received.

iii. Admin can see pending document status across all leads.

F. Delivery Team (Delivery Department only)
   a. Access Delivery module only.
   b. Can update delivery status, attach documents, and mark deliveries as completed.
   c. Cannot see cost, profit, or Sales remarks.

G. Human Resource (HR) Department
   a. Each staff member (Sales, Accounts, Operations, Delivery, Post-Sales) has an HR profile inside CRM.
   b. Profile includes: Name, role, department, date of joining, contact info, performance history.
   c. No access to leads, client data, or financials.
   d. Can only see salesperson Booked Value & Incentive Progress.
   e. Record payouts (with Admin approval).
   f. Generate performance and incentive reports for Admin.
   g. Monitor incentives (progress vs targets).
   h. Cannot define incentive rules (Admin only).
   i. Cannot assign or reassign leads.
   j. Cannot change financial records.

H. Incentives Module
   a. Admin sees full profit and incentive details.
   b. Salespersons see only earned incentives and progress vs target.
   c. Accounts can see profit for calculation purposes.
   d. Delivery Team has no access.

3. Lead Management (Sales Department)

A. Lead Lifecycle: New → Contacted → Follow-up → Priority → Booked → Closed.

B. Track stage changes with history log.

C. Lock editing once Closed (only Admin can reopen).

D. Admin distributes leads; Salespersons with permission can assign/reassign leads.

E. Lead details: TSQ, customer name, contact, email, address, service, destination, date of travel, number of person (with respect to adults (12 years age and above, children (3 - 11 years) and infant (below 2 years)) assigned salesperson.

F. Remarks Section:
   a. Daily communication logs.
   b. Include follow-up date and destination/service type.

G. Filters & Search:
   a. Filter by service, destination, pending follow-ups, priority.
   b. Search by customer name, contact, email, or TSQ; display assigned salesperson.

H. Notifications & Reminders:
   a. Salespersons: Badge/highlight for due/overdue follow-ups.

b. Admin: View pending follow-ups across all Salespersons, leads assigned per date, and query activity.

c. Reminders appear on dashboard and as popup alerts.

I. Dashboard Metrics:

a. Lead counts by service.

b. Pending follow-ups.

c. Total pending payments.

d. Total received payments.

4. Accounts & Payment Management (Accounts Department)

a. Track pending/received payments; set deadlines.

b. Support partial payments/installments with multiple due dates.

c. Admin can view/edit payment status per lead.

A. Cost Price & Profit Tracking:

a. Accounts can add/edit component-wise costs: Hotel, Transport, Air Ticket, Train Ticket, Bus Ticket, Visa, Travel Insurance, etc.

b. Add new components as needed.

c. Cost prices visible only to Accounts & Admin.

d. Auto-calculate Profit = Selling Price – Total Cost Price.

e. Accounts dashboard shows Total Revenue, Total Cost, Net Profit.

f. Admin can export reports including selling price, cost breakdown, and profit.

B. Export Feature:

a. Admin-only Excel/CSV export: TSQ, service, destination, customer, payment status, costs, profit.

5. Profit-Based Incentive Scheme (Sales Department)

A. Incentives calculated on Profit = Selling Price – Total Cost Price.

B. Admin defines rules: fixed % of profit, tiered incentives, minimum profit threshold.

C. Incentives auto-calculated when lead is Booked and payment conditions are met.

D. Salesperson dashboard:

a. Shows only earned incentives and progress vs target.

b. Profit and cost details are hidden.

E. Admin dashboard:

a. Full visibility: revenue, cost, profit, and profit-based incentives per salesperson.

F. Incentive history logs: TSQ, booking value, total cost, profit, incentive amount, payout date.

G. Notifications: Salespersons alerted on credited/updated incentives; Admin receives summary alerts for high-profit leads.

6. Delivery Management (Delivery Department)

A. Auto-Assign Delivery: Once a lead is Vouchered, operation team can assign it to Delivery Team.

B. Delivery Status: Pending → In Process → Delivered.

C. Delivery team updates status with date/time and remarks (courier ID, hand delivery, etc.).

D. Attach soft copies: tickets, vouchers, insurance docs.

E. Notifications: Salesperson & Admin receive alerts when delivery is completed.

F. Delivery dashboard highlights pending and overdue deliveries.

G. Only Delivery Team & Admin can update status; Salespersons can view only.

H. Admin can export delivery reports including auto-assigned leads & delivery status.

7. Dashboard & Reporting (All Departments)

A. Lead reports: Pending, Closed, Priority, Follow-up, Salesperson-wise.

B. Accounts reports: Revenue, Cost, Profit, Payment Status.

C. Operations reports: Pending, Processed, Completed, Vouchered.

D. Delivery reports: Pending, In Process, Delivered.

E. Post Sales reports: Pending, In Process, Received

F. Incentive reports: Profit-based incentives per salesperson, history.

G. Dashboard metrics per department:

- a. Admin: Sees everything (financial + operational + HR).
- b. Sales: Lead counts, pending follow-ups, priority leads.
- c. Operations: Sees booked leads, documents & service tasks.
- d. Post-Sales: Sees documents from clients.
- e. Accounts: Total Revenue, Total Cost, Net Profit, pending/received payments.
- f. Delivery: Pending/Overdue deliveries.
- g. Human Resource: Sees people & incentives
- h. Incentives: Salesperson incentives earned (without profit disclosure).

8. Business Rules

A. Leads distributed by Admin.

B. Salespersons can reassign leads only if granted permission.

C. Filter leads by destination or service type.

D. Payment deadlines trigger reminders for timely collections.

E. Booked Value / Revenue mandatory at Booked stage.

F. Profit-based incentives calculated after considering cost components.

System scalable for future destinations and service expansions.