

Travelingos

Client: Asaf Levi

Country: US

Subscription: ZOHO ONE

Total Users: 2





About Travelingo:

Travelingo specializes in providing luxury travel experiences. They offer comprehensive services to ensure that their clients have an exceptional vacation. This includes assistance with trip planning, personalized recommendations, and support throughout the entire journey, from the initial stages of organizing the trip to the moment the client returns home. Their goal is to create memorable and luxurious travel experiences for their customers, catering to their every need and ensuring their safety and satisfaction throughout the entire process.



Project Overview:

The project involved integrating Zoho SalesIQ, Zoho CRM, Zoho Flow, Zoho Desk, Zoho Booking, and DNA Travel to create an efficient ecosystem. The key components included codeless chat with questions, automatic ticket creation, communication workflows, lead creation and updates, error handling, and automated email responses for reservation confirmations and cancellations.



Project Objective:

The objective of this project was to enhance the customer experience by implementing integrated solutions across multiple Zoho platforms. The primary focus was on improving communication, automating processes, and providing personalized support to customers.



Challenges

Travelingo encountered several challenges as they tried to refine its communication processes and smoothly integrate various systems. One significant hurdle involved setting up smooth communication channels across platforms, such as WhatsApp, SMS, and email, to ensure customers could interact effortlessly. Additionally, integrating different Zoho products and third-party systems posed another challenge, requiring the company to create a unified workflow to enhance operational efficiency.

Error handling and activity logging became important for monitoring and troubleshooting purposes, ensuring the stability and reliability of the system. Thorough testing and validation of integrations to guarantee accurate and timely data transfer, ultimately delivering a better user experience. Lastly, customizing email templates and automating responses for reservation confirmations and cancellations demanded careful setup to match what customers wanted.



Solution:

UniCloud IT Services embarked on a strategic initiative to address integration challenges faced by their client. Harnessing their expertise, the team smoothly integrated various Zoho products and third-party systems using methods like APIs and webhooks, enhancing system functionality. .

Meticulously defining triggers and criteria within Zoho CRM and Kommo ensured accurate lead creation and updates, facilitating real-time access to lead information and streamlining sales processes. Recognizing the importance of effective communication, they configured workflows for automated communication via WhatsApp, SMS, and email, tailored to user preferences, thereby improving customer engagement and satisfaction. Robust error handling mechanisms and logging procedures were implemented to maintain system reliability, enabling proactive monitoring, troubleshooting, and ensuring smooth operation. Thorough testing and validation of integrations guaranteed accurate data transfer and functionality, providing users with an easy and smooth experience and meeting client expectations

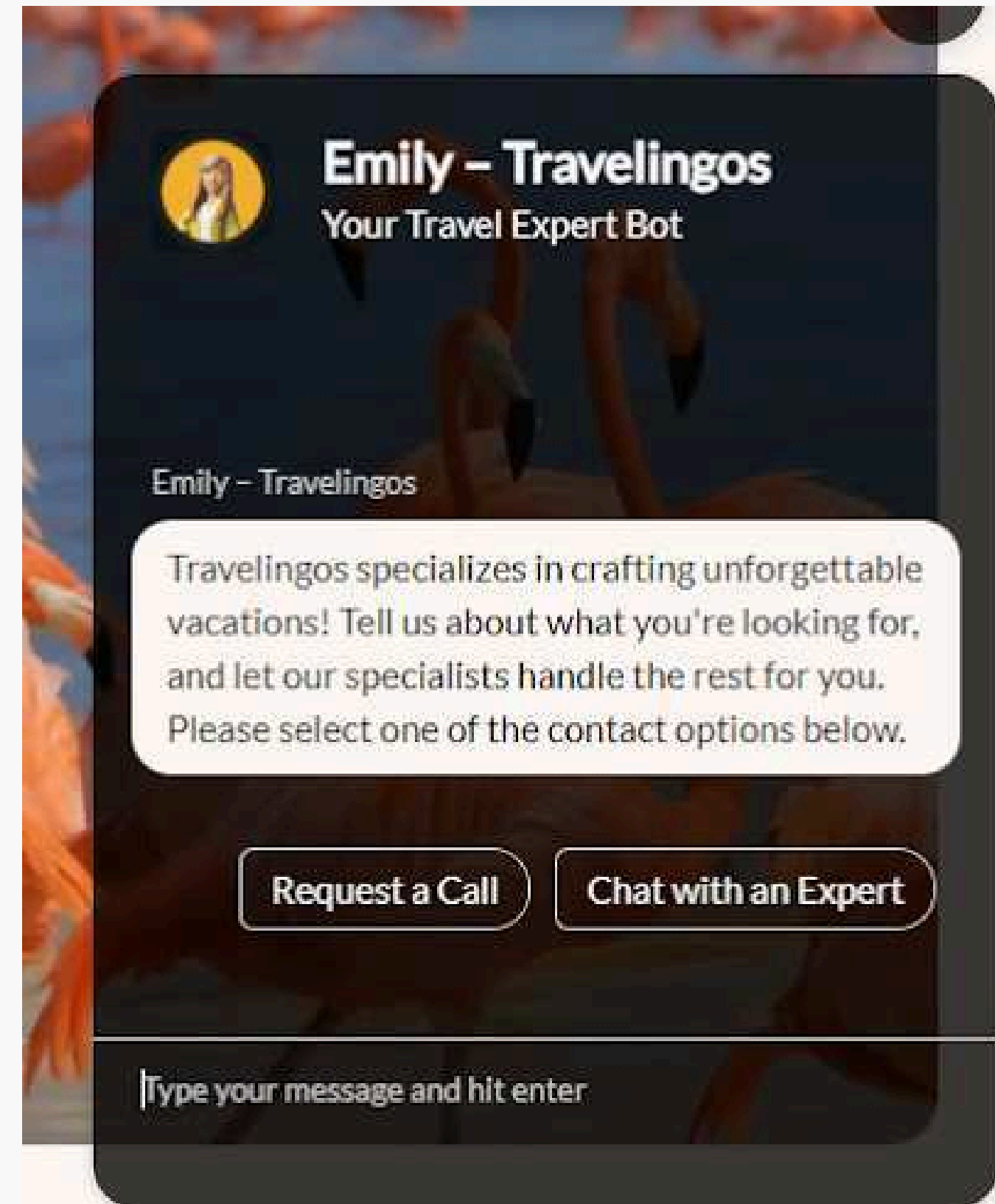
Functionality & Features

Recognizing the need for enhanced functionality, UniCloud IT Services implemented a range of features to strengthen Travelingo's capabilities.

Users now benefit from interactive chat with questions via Zoho SalesIQ and automated post-chat communication through Zoho Desk. In Zoho CRM, automation rules swiftly generate tickets in Zoho Desk upon lead creation. Integration points between Zoho SalesIQ and Zoho CRM enable ticket creation and communication with Zoho Desk. Zoho Flow facilitates efficient reservation ticket creation and contact/lead management. Kommo and Zoho CRM integration ensures secure data exchange, while Zoho Booking integration automates ticket creation and meeting rescheduling processes. Finally, integration between DNA Travels and Zoho CRM enables enhanced reservation processes and automated email responses, alongside a status update flow for timely communication with customers.

ZOHO SalesIQ:

- **Codeless Chat with Questions:** Integrated a codeless chat feature within ZOHO SalesIQ to engage users with questions.
- **Workflow for Communication:** Established a workflow in ZOHO Desk to automate communication processes post-chat, utilizing preferred channels like WhatsApp, SMS, and Email.



ZOHO FLOW:

- **Function Definition:** Defined a function to create reservation tickets, enabling efficient handling of customer bookings and inquiries.
- **Contact and Lead Handling:** Utilized ZOHO CRM's contact and lead management capabilities to enhance the reservation process, ensuring accurate data handling and mapping.

Kommo and Zoho CRM Integration:

- **Integration Setup:** Established integration between Kommo and Zoho CRM using diverse methods such as APIs and webhooks, ensuring secure data exchange.
- **Lead Creation and Updates:** Defined triggers and criteria for lead creation and updates, ensuring comprehensive lead management and accurate data synchronization.

CRM

HomeLeadsClientsAccountsReservations BookHotelBookingsToolsMeetings

4 Joe [redacted]

Save LeadCancelEdit...

4 Report Card

Notes

Customers

Prochessers

Products

Class Activities

Class Activities

Interest Meetings

Events

Conferences

Social

Life Survey

Follow Up

Video (New Activity)

Life Desk (1)

CRM History

CRM Template

Success Reporting

OverviewLocation

Lead Information

Lead Owner [redacted]

Title [redacted]

Phone [redacted]

Mobile [redacted]

Lead Source [redacted]

Contact Source [redacted]

Industry [redacted]

Assigned Business [redacted]

Lead Gen Date [redacted]

Modified By [redacted]

Assigned Conversion Status [redacted]

Lead Lead ID [redacted]

Plan Price [redacted]

Company

Lead Name [redacted]

Email [redacted]

Fax [redacted]

Website [redacted]

Lead Status [redacted]

No. of Employees [redacted]

Rating [redacted]

Created By [redacted]

Stage ID [redacted]

Secondary Email [redacted]

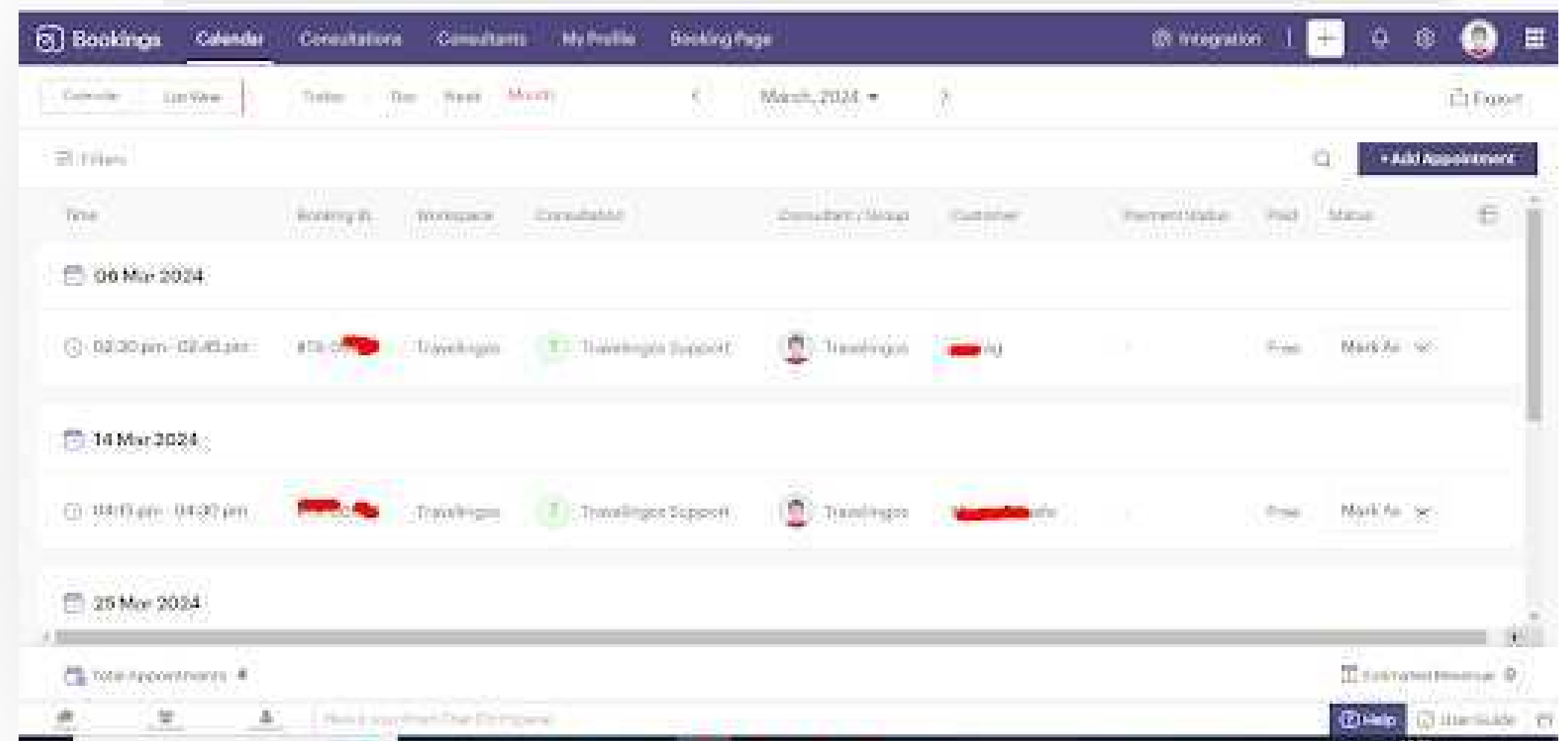
Notes [redacted]

Lead City [redacted]

Business Location [redacted]

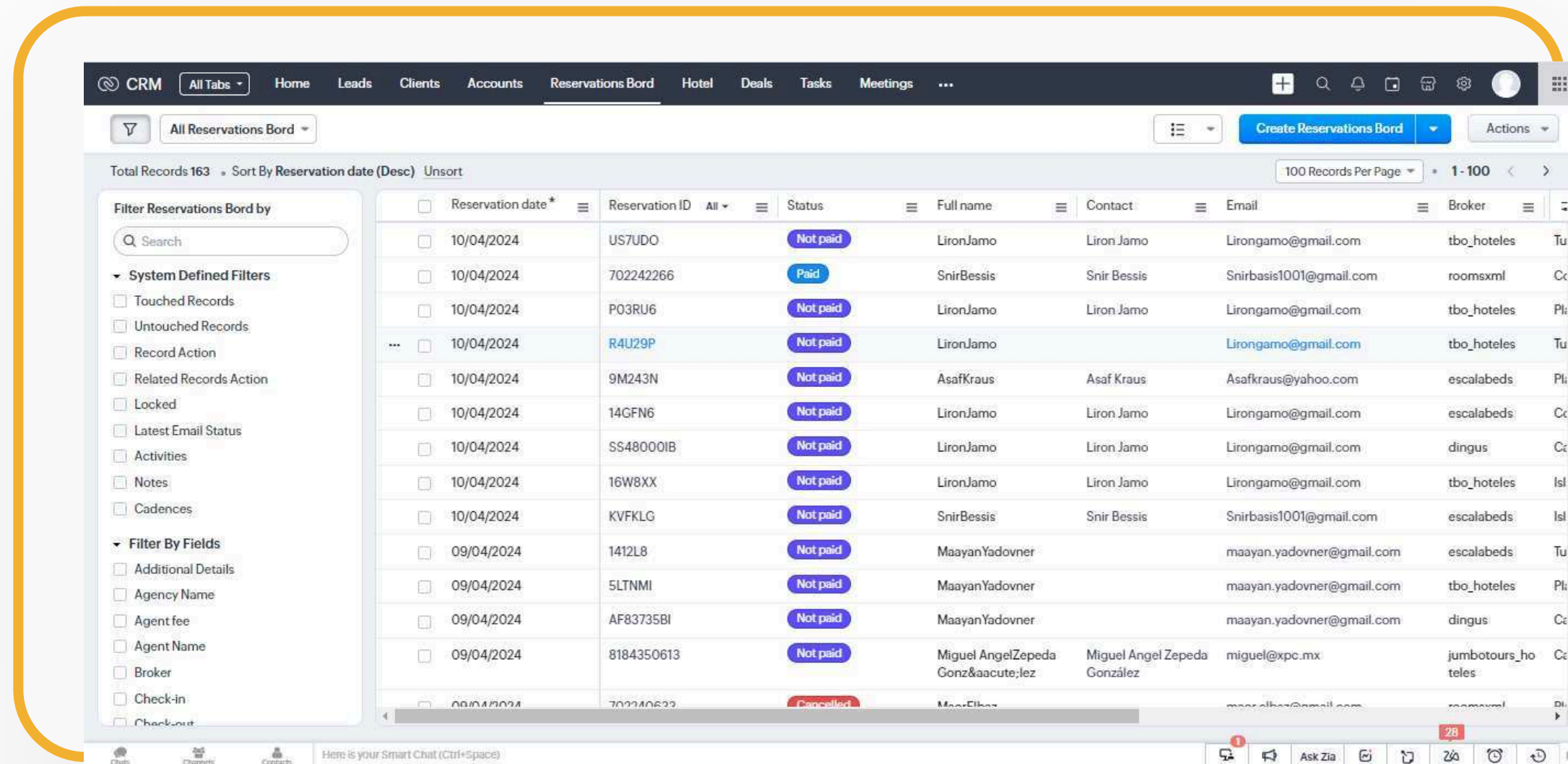
ZOHO Booking Integration:

- **Integration Setup:** Configured integrations and workflows between ZOHO Desk and ZOHO Booking to automate ticket creation and meeting rescheduling processes.
- **Confirmation and Communication:** Implemented mechanisms to confirm ticket creation and communicate relevant details, enhancing user experience and ensuring transparency.



DNA Travel Integration:

- **Integration Setup:** Established integration between DNA Travels and Zoho CRM to enhance reservation processes and enable automated email responses.
- **Status Update Flow:** Developed a flow to detect events and update reservation statuses, ensuring timely updates and effective communication with customers.



The screenshot displays the Zoho CRM Reservations Board interface. The top navigation bar includes tabs for CRM, All Tabs, Home, Leads, Clients, Accounts, Reservations Board (active), Hotel, Deals, Tasks, and Meetings. Below the navigation bar, there's a search bar and a dropdown for 'All Reservations Board'. The main area shows a table of reservations with columns for Reservation date, Reservation ID, Status, Full name, Contact, Email, and Broker. The table is filtered by 'Reservation date (Desc)' and shows 100 records per page. The status column contains buttons for 'Not paid', 'Paid', and 'Cancelled'. The left sidebar contains filters for System Defined Filters and Filter By Fields.

Reservation date*	Reservation ID	Status	Full name	Contact	Email	Broker
10/04/2024	US7UDO	Not paid	LironJamo	Liron Jamo	Lirongamo@gmail.com	tbo_hoteles
10/04/2024	702242266	Paid	SnirBessis	Snir Bessis	Snirbasis1001@gmail.com	roomsxml
10/04/2024	P03RU6	Not paid	LironJamo	Liron Jamo	Lirongamo@gmail.com	tbo_hoteles
10/04/2024	R4U29P	Not paid	LironJamo		Lirongamo@gmail.com	tbo_hoteles
10/04/2024	9M243N	Not paid	AsafKraus	Asaf Kraus	Asafkraus@yahoo.com	escalabeds
10/04/2024	14GFN6	Not paid	LironJamo	Liron Jamo	Lirongamo@gmail.com	escalabeds
10/04/2024	SS48000IB	Not paid	LironJamo	Liron Jamo	Lirongamo@gmail.com	dingus
10/04/2024	16W8XX	Not paid	LironJamo	Liron Jamo	Lirongamo@gmail.com	tbo_hoteles
10/04/2024	KVFKLG	Not paid	SnirBessis	Snir Bessis	Snirbasis1001@gmail.com	escalabeds
09/04/2024	1412L8	Not paid	MaayanYadovner		maayan.yadovner@gmail.com	escalabeds
09/04/2024	5LTNMI	Not paid	MaayanYadovner		maayan.yadovner@gmail.com	tbo_hoteles
09/04/2024	AF83735BI	Not paid	MaayanYadovner		maayan.yadovner@gmail.com	dingus
09/04/2024	8184350613	Not paid	Miguel AngelZepeda Gonzalez	Miguel Angel Zepeda González	miguel@xpc.mx	jumbotours_hoteles
09/04/2024	702240633	Cancelled	MaayanYadovner		maayan.yadovner@gmail.com	roomsxml

CRM

HomeLeadsClientsAccountsReservations BookHotelBookingsToolsMeetings

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Save LeadCancelEdit...

4 Report Card

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Social

Life Survey

Follow Up

Video (New Activity)

Life Desk (1)

CRM History

CRM Template

Success Reporting

OverviewLocation

Lead Information

Lead Owner [REDACTED]

Title [REDACTED]

Phone [REDACTED]

Mobile [REDACTED]

Lead Source [REDACTED]

Current Source [REDACTED]

Industry [REDACTED]

Annual Revenue [REDACTED]

Lead Gen Date [REDACTED]

Modified By [REDACTED]

Assigned Campaign/Source [REDACTED]

Source Lead ID [REDACTED]

Plan Price [REDACTED]

Company

Lead Name [REDACTED]

Email [REDACTED]

Fax [REDACTED]

Website [REDACTED]

Lead Status [REDACTED]

No. of Employees [REDACTED]

Rating [REDACTED]

Created By [REDACTED]

Stage ID [REDACTED]

Secondary Email [REDACTED]

Notes [REDACTED]

Lead City [REDACTED]

Business Location [REDACTED]

CRM

All Tabs

Home

Leads

Clients

Accounts

Reservations Bord

...

+

🔍

🔔

📅

📁

⚙️

👤

7

702242266

Send Email

Edit

...

<

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Related List

Notes

Reservation Details

Attachments

Emails 1

Open Activities 1

Closed Activities

Add Related List

Links

Add Link

Overview

Timeline

Last Update : 5 day(s) ago

No Attachment


Emails

Compose Email

Mails

Drafts

Scheduled

<input type="checkbox"/>	Subject	Date	Source	Sent By	Status
<input type="checkbox"/>	 Your Booking Confirmation at ... snirbasis1001@gmail.com	10/04/2024 10:43...	Workflow Alert	Asaf Levi	Opened

Open Activities

Add New

Column View

📄

☒ Open Tasks 1

☐ Open Meetings 0

☐ Open Calls 0



Conclusion:

By applying integrated solutions across multiple Zoho platforms, UniCloud IT Services successfully achieved its objective of enhancing the customer experience for Travelingo. The communication, automated processes, and personalized support capabilities implemented have significantly improved customer satisfaction and efficiency. Travelingo now stands as a leader in the industry, equipped with enhanced tools and systems to cater to the diverse needs of its clientele, setting new standards for excellence in the travel industry

About us

Unicloud IT Services was officially launched in the year 2018 on the 12th of September. Unicloud IT Services is a cloud service provider company. With over total experience of more than 7 years, Unicloud's developers are committed to providing dedicated services for ZOHO products to its clients. Unicloud has a high rate of client retention and successful deliveries.

We have more than 4000+ customers to whom we have provided the services and been providing support. Unicloud has completed 897+ Projects along with more than 4000+ satisfied customers and with a project succession rate of 95% to date and continuously working on more projects from different industries.

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