TravelJoy Inquiry -> Booking -> Recording Task List

1. CLIENT INTAKE

- [ ] Client Completes Initial Travel Survey, Assign this Task List to Client in TravelJoy
- [ ] TravelJoy Auto Creates Client Trip & Contact
- [ ] OR Manually Create Client Trip & Contact Info
- [ ] Send Booking Questionnaire Email with Link to Specific Supplier
- [ ] Client Completes Booking Questionnaire, Auto Send "Your Magic Expert" Email

2. CREATING A SMART PROPOSAL

- [ ] Edit Client Trip & Add Details
- [ ] Create Smart Proposal
- [ ] Send Proposal with Email
- [ ] Send Proposal Follow-Up Email

WATCH BOOKING TUTORIAL HERE

3. PROPOSAL APPROVAL & INVOICING

- [ ] Client Approves Proposal
- [ ] Create Trip Invoice
- [ ] Enter All Details & Expected Commission + Date
- [ ] Send "Proposal Approved, Ready to Book, Credit Card Authorization" Email with Invoice

4. BOOKING & PAYMENT

- [ ] Book Vacation & Download Confirmation Docs from Supplier (Screenshot Commission)
- [ ] Update Trip Details with Confirmation Number(s)
- [ ] Record Payment & Confirmation Number(s) in Invoice & Send Receipt
- [ ] Send Booked Email with Confirmation Docs Attached
- [ ] Add Confirmation Docs to Client Files

CLIENT WORKFLOWS BY SUPPLIER

The following workflow task lists can be found in TravelJoy via the side bar under “Templates → Task Lists → Team Templates Tab”

Disneyland, Walt Disney World, Disney Cruise Line, Aulani, Universal Orlando Resort, Universal Studios Holllywood, and Royal Caribbean Cruise Line

More to come...

5. INTERNAL RECORD-KEEPING

- [ ] Record Client Booking in Google Sheets
- [ ] Record Details in Annual Organizer Tab
- [ ] Record Details on Month Tab
- [ ] Assign Client a Supplier Workflow

***PLEASE PAY CLOSE ATTENTION TO ALL INFO AND DETAILS IN THE GUIDES FOR TRAVELJOY AND GOOGLE SHEETS**