



FlyQuote
Travel Agency Office Management

Complete CMS Product Guide

For modern travel agencies, teams and partner agents

A professional overview and from-scratch user guide covering setup, quotations, group flights, hotel vouchers, accounting, team invites, tasks, chat and agency operations.

AI Quotations

Group Flights

Team CMS

Hotel Vouchers

Ledger

Chat

Dashboard

Quotations

Group Flights

Hotel Vouchers

Team & Tasks

Ledger

Quote Pipeline

PKR 18.4M

Open Tasks

42

Active Agents

16

AI package quotation generated

7 days Umrah package - 2 adults - private transfer - hotel voucher ready

Ready to send

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A complete user guide for setting up and operating FlyQoute CMS

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05. Group Flights & Ticket Booking Create groups, manage seats, invite agents and track issued tickets.	06. Hotel Vouchers Create branded hotel booking vouchers with hotel, guest, stay and payment details.
07. Inventory & Master Data Hotels, airlines, visas, vehicles, transfers, sharing bus, route codes and currencies.	08. Team, Tasks, Invites & Chat Agency admin, team members, travel agent invites, task assignments and group chats.
09. Accounting & Ledger Payments, commission, booking records, receipts, audit-friendly records and reports.	10. Workflows, Checklist & FAQ Practical operating workflows, onboarding checklist and support guidance.

Recommended reading order

Start with CMS setup first. Complete company profile, PDF branding, base currency, master data and team permissions before creating live quotations, vouchers and group flight bookings.

01. Executive Overview

FlyQuote is an all-in-one travel agency CMS and operating system

FlyQuote is a premium travel agency operating system designed to replace scattered spreadsheets, WhatsApp follow-ups, manual quotation files and disconnected booking records with one professional CMS. It centralizes quotations, group flights, hotel vouchers, master data, team tasks, invited travel agents, accounting records and internal chat into a single workflow.

The system is built for agency owners, admins, sales teams, ticketing officers, accounts staff and invited travel agents who need a fast, organized and branded way to sell travel services.



Quote faster

Create package, ticket and AI-assisted quotations with reusable agency data.



Control operations

Manage hotels, visas, airlines, route codes, transport and currency from one CMS.



Run teams

Invite staff, assign tasks, manage roles, and keep agency work visible.



Book tickets

Invite travel agents to access allowed group flights and book available seats.



Generate documents

Create professional quotation PDFs, payment receipts and hotel vouchers.



Stay connected

Use team chats and group chats to reduce scattered WhatsApp operations.

Who should use this guide?

- **Agency owners/admins:** Use this guide to set up the CMS, configure branding, add master data, invite teams and monitor operations.
- **Sales agents:** Use it to understand how to create quotations, manage drafts and send branded PDFs to clients.
- **Ticketing staff:** Use it to manage group flights, issue seats, track PNRs and coordinate with invited travel agents.
- **Accounts staff:** Use it to understand ledger, payments, receipts, and status tracking.
- **Invited travel agents:** Use it to understand how invite-based access works for ticket booking and collaboration.

02. First-Time CMS Setup

Complete this setup before creating live quotations or vouchers

Before starting

Set up your CMS once, then daily work becomes much faster. The most important setup steps are company profile, logo, terms, base currency, PDF template, hotels, airlines, route codes, visas, transport and team access.

Step	Setup Area	What to Complete	Why It Matters
1	Company Profile	Agency name, logo, email, phone, address, terms and payment QR if available.	Used automatically in quotation PDFs, hotel vouchers, receipts and client-facing documents.
2	PDF Template	Choose your default quotation PDF template from the template library.	New quotations will use this selected design. Old quotations should keep the template selected at creation time.
3	Base Currency & ROE	Choose base currency, add exchange rates, mark manual rates if needed.	Keeps package, ticket and ledger calculations consistent.
4	Master Data	Add hotels, airlines, visa types, route codes, vehicles, private transfers and sharing bus routes.	Powers autocomplete and speeds up quotation creation.
5	Group Flights	Add airline, PNR, routes, seats, fares, luggage and status.	Allows the agency and invited agents to book and track seats.
6	Team & Access	Invite team members, assign roles and permissions.	Prevents unauthorized actions and keeps work structured.
7	Tasks & Chat	Create task flows and internal/team/group chats.	Coordinates daily operations and reduces lost follow-ups.

Company profile setup

The company profile is the foundation of the CMS. Every professional client-facing document should use the agency identity from settings. Complete the company name, logo, email, phone, address, terms and any payment QR code before generating documents.

Base currency setup

Set the base currency that represents how your agency tracks cost and profit internally. For example, if your base is PKR, other currencies should show conversion into PKR. This helps tickets, packages, ROE, ledger and total calculations stay transparent.

CMS Setup Checklist

Use this as the onboarding checklist for every new agency account

Area	Required Configuration	Recommended Notes
Settings	Company name, logo, contact details, address, terms, payment QR.	Logo should be clear and professional because it appears in PDFs and vouchers.
PDF Templates	Select default quotation PDF template.	Template change affects future quotations only; old quotations preserve their snapshot.
Currencies	Base currency, currency list, ROE, manual override if needed.	Keep exchange rates updated before sending quotations.
Route Codes	Airport/city codes with full readable names.	Client-facing PDFs should show readable names such as Multan, Dubai, Jeddah, Madinah.
Airlines	Airline name, code, country, active status.	Used in ticket quotes and group flights.
Hotels	Hotel name, city, rating, room notes, pricing if available.	Used in package quotations and hotel vouchers.
Visa Types	Country, visa name/type, duration, cost and requirements.	Used in package quotations and visa rows.
Vehicles	Vehicle types such as Sedan, GMC, H1, Hiace, Coaster.	Used in transport and transfer costing.
Private Transfers	From/to routes, vehicle, price, notes.	Used in package costing and client transport details.
Sharing Bus	Shared route, price, timing and notes.	Used when package includes shared transport.
Team & Access	Roles, permissions, user status and module access.	Owner/admin should control who can create, edit, delete, approve and manage settings.
Tasks	Create daily tasks, assign to users, set priority and due dates.	Keeps the team accountable.
Chat	Enable team chat and group chats for agency/agent coordination.	Reduces scattered WhatsApp-only coordination.

03. Dashboard & Daily Operations

Your command center for agency activity

The dashboard should give agency owners and managers a quick view of current activity: quotations, group flights, tasks, pending bookings, ledger movement, team activity and support items. It is the first place users should check each day.

Daily operating rhythm

Time	Action	Outcome
Morning	Review dashboard, open tasks, pending quotations and group flight availability.	Team starts with a clear plan.
During day	Create quotations, book seats, issue vouchers, update ledgers and use chat for coordination.	Operations remain centralized.
End of day	Review task completion, quotation status, issued tickets, payments and agent activity.	Admin can identify pending work before closing.

Dashboard should help answer

- How many quotations are draft, sent, approved or paid?
- Which group flights still have available seats?
- Which team tasks are overdue or pending?
- Which hotel vouchers were recently issued?
- Which payments, commissions or ledger entries need review?
- Which invited agents are active and booking tickets?

Operational principle

FlyQuote works best when the agency treats it as the official source of truth. WhatsApp can still be used for client communication, but quotations, vouchers, tickets, payments, tasks and team activity should be recorded inside the CMS.

04. Quotations

Package quotations, ticket quotations and AI quotation drafts

The Quotations module is the sales engine of FlyQoute. It allows an agency to prepare professional client proposals using saved agency data, pricing, selected currency, branding and PDF templates.

Quotation Type	Purpose	Typical Data Included
Package Quotation	Full travel package proposal.	Client details, visas, hotels, private transfers, sharing bus, flights, insurance, profit, adjustments, notes, terms and grand total.
Single Ticket Quotation	Quick flight/ticket quotation.	Client details, route, departure/arrival time, airline, flight number, PNR, baggage, pax pricing, currency and notes.
AI Quotation	Generate an editable draft from a natural-language prompt.	AI suggests package structure using available CMS data; user reviews and edits before saving.

Package quotation flow

Step	Section	What User Enters
1	Client Details	Client name, phone, email, adults, children, infants, destination/package context and currency.
2	Visa & Transport	Visa rows, private transfers, sharing bus rows, vehicles and route details.
3	Accommodation	Hotel, city, room type, nights, check-in/check-out and hotel pricing.
4	Ticketing & Review	Outbound/return flights, airline, route, departure/arrival time, baggage, PNR, pricing, profit and final review.

Draft and resume behavior

Unfinished quotations should be saved as drafts. When a user returns later, FlyQoute should prompt them to Resume Draft, Start New or Clear Draft. Drafts should save during step changes and important edits with a debounce so Firebase writes remain cost-efficient.

PDF template behavior

When a quotation is created, the currently selected default PDF template should be saved as a snapshot inside that quotation. If the agency changes the default template later, only new quotations should use the new template. Existing quotations should keep the original template used when they were created.

Quotation Management

Search, filter, status, share, print and receipt workflows

Action	What It Does	Recommended Behavior
View	Open quotation details and client-facing preview.	Show readable routes, clear totals and document options.
Edit	Update quotation fields or resume draft.	Keep entered data safe when moving between steps.
Duplicate	Create a copy for similar clients/packages.	Generate a new quote ID and preserve editable fields.
Preview PDF	Show branded quotation PDF before sending.	Use company branding and selected PDF template snapshot.
Share	Share PDF/link to client or team.	WhatsApp web fallback can use client phone when available.
Print	Print professional PDF quotation.	Use print dialog and keep layout clean.
Copy Link	Copy stored PDF or public quotation link.	Useful for WhatsApp, email and QR code.
Status Change	Draft, Sent, Approved, Paid, Partially Paid, Cancelled, Expired.	Paid/Partially Paid should reveal receipt actions.
Receipt	Generate payment receipt after payment.	Include client, quote ID, amount paid, method, status and agency branding.
Archive	Hide old quotations from active view.	Prefer archive over permanent delete.

Client-facing rule

Do not show technical route codes only. If MUX, DXB, JED or MED are used, the client-facing preview and PDF should display readable names such as Multan, Dubai, Jeddah and Madinah when available.

05. Group Flights & Ticket Booking

Manage seats, PNRs, agents and issuance from one place

The Group Flights module is designed for agencies that sell group seats. It allows admins to publish available groups, monitor availability, pause/stop groups, track temporary bookings, and issue tickets with a proper activity trail.

Feature	Details
Group Creation	Add airline, sector/route, departure and arrival date/time, PNR, seats, fare per seat, baggage and notes.
Status Control	Active groups allow bookings. Paused or stopped groups should block new bookings but remain visible for management.
Seat Booking	Select seat, enter passenger details, passport number, person-at-desk and booking source.
Temporary Hold	Temporary booking can expire after a configured time window, such as 30 minutes.
Ticket Issuance	Issue ticket after payment/confirmation and store issued timestamp, receipt/reference and staff name.
Agent Invites	Admin can invite travel agents by email, similar to Facebook invite flow. Accepted agents can join and book allowed tickets.
Filters	Available seats, booked seats, issued seats, group seats and all seats.
Export	Export booked or issued passenger data for operational review.

Recommended flow for invited travel agents

- Agency admin enters the travel agent email and sends an invite.
- The invited agent receives/accepts the invite and joins the agency workspace or allowed booking area.
- Admin controls what the invited agent can see and book.
- Agent books seats from allowed group flights.
- Agency ticketing team reviews, confirms and issues tickets.
- All activity is recorded against the agent and group flight for accountability.

06. Hotel Vouchers

Professional hotel booking vouchers for clients and suppliers

The Hotel Voucher module creates branded hotel booking vouchers that can be downloaded, printed or shared. It should use company branding from settings and keep voucher records scoped to the current agency.

Voucher Section	Fields / Purpose
Agency Branding	Company logo, company name, contact details and generated-by FlyQoute footer.
Voucher Identity	Voucher number, booking/reference number, issue date, status and payment status.
Guest Details	Guest name, phone, email, nationality, passport/reference if needed and total guests.
Hotel Details	Hotel name, city, address, contact and supplier/confirmation notes.
Stay Details	Check-in, check-out, nights, room type, rooms, meal plan and special instructions.
Payment Summary	Amount, currency, payment status, notes and terms.
Barcode	Unique stable barcode/value saved with voucher and printed in PDF.

When to create a hotel voucher

- After hotel booking is confirmed.
- When client needs a printable proof of stay.
- When the agency needs a supplier/client-facing booking document.
- When package quotation is converted into a confirmed booking.

Voucher quality standard

Voucher PDFs should remain simple, clean and professional. Keep the layout clear: branding at the top, booking identity, guest/hotel/stay/payment details, terms and a stable barcode.

07. Inventory & Master Data

The reusable data that powers fast quotation creation

Master data is the heart of the CMS. It reduces repeated typing, improves accuracy, powers autocomplete, and keeps the agency database organized.

Module	Used For	Important Fields
Hotels	Package quotations and hotel vouchers.	Hotel name, city, rating, address, contact, room notes and pricing notes.
Airlines	Ticket quotes and group flights.	Airline name, code, country, active status and notes.
Visa Types	Package visa rows and visa quotations.	Country, visa name/type, duration, cost, requirements and processing notes.
Route Codes	Readable airport/city names in quotes and PDFs.	Code, city/name, country and alias.
Vehicle Types	Transport costing and transfer planning.	Vehicle name/type, capacity and notes.
Private Transfers	Package transfers and transport cost rows.	From, to, vehicle, price, currency and notes.
Sharing Bus	Shared transport package rows.	Route, timing, price, seats/notes and active status.
Currency & ROE	Pricing, conversions and ledger consistency.	Base currency, exchange rates, manual override and last update.

Add new values from quotation forms

If a user types a new hotel, airline, visa type, route, vehicle, transfer or bus route that does not exist yet, it should still be accepted in the quotation and can be saved back into the relevant collection for future autocomplete.

Duplicate entries should be avoided.

08. Team, Tasks, Invites & Chat

The CMS layer that turns FlyQuote into a complete agency operating system

FlyQuote is more than a quotation tool. With team management, invite-based access, task management and chat, it becomes a complete CMS for agency operations.

Area	What Admin Can Do	User Experience
Team Members	Add internal staff by email, assign role, status and permissions.	Team member joins agency workspace and sees allowed modules.
Travel Agent Invites	Invite external travel agents by email to book tickets or collaborate.	Invite flow works like Facebook: add email, send invite, user accepts and joins.
Roles & Permissions	Control create, edit, delete, approve, export, issue, ledger and settings permissions.	Users only see or perform actions allowed by admin.
Tasks	Create tasks, assign owner, priority, due date, linked client/quote/booking and status.	Team members see assigned tasks and mark progress/completion.
Team Chat	Chat between admin and team members.	Keeps agency communication inside the CMS.
Agent Chat	Chat with invited travel agents.	Useful for seat booking questions, confirmations and updates.
Group Chats	Create shared rooms for teams/agents/groups.	Keeps discussions organized by operation, team or group flight.

Suggested roles

Role	Typical Access
Agency Owner	Full access to settings, team, permissions, quotations, groups, ledger, vouchers and reports.
Admin / Manager	Operational management, team tasks, quotations, group flights, approvals and reports.
Sales Agent	Create quotations, manage clients, follow up and send proposals.
Ticketing Officer	Manage group flights, bookings, PNRs, issued tickets and ticket quotes.
Accounts Officer	Ledger, receipts, payment status, commission and reports.
Invited Travel Agent	Book allowed group flight seats, communicate with agency, view limited permitted data.
Read Only	View-only access for audits, management or training.

09. Accounting & Ledger

Track financial movement connected to agency operations

The Accounting & Ledger module should connect quotations, bookings, tickets, payments, commission and receipts. It gives the agency a professional way to track money movement and reduce manual account confusion.

Record Type	Purpose
Client Payments	Track amount paid, payment method, reference, payment date and balance.
Quotation Totals	Store package/ticket totals, currency, ROE used, profit and adjustments.
Ticket Issuance	Connect payment/receipt to issued ticket and group flight seat.
Commission Tracking	Track commission or margin for agency, staff or invited travel agents if applicable.
Receipts	Generate payment-focused branded receipt after Paid or Partially Paid status.
Audit Trail	Keep timestamps and staff/agent references for changes and financial records.

Receipt PDF should include

- Company logo and company name.
- Receipt number and quotation ID.
- Client name, phone and email.
- Payment date, amount paid, currency and payment method.
- Purpose or purchase summary.
- Payment status such as Paid or Partially Paid.
- Agency contact details and payment QR if available.

Accounting principle

Quotation PDF and receipt PDF should be separate documents. The quotation explains the offer. The receipt confirms payment.

10. Practical Workflows

How users should operate the system from scratch

Workflow A - New agency onboarding

Step	Action
1	Create agency account and sign in as agency owner/admin.
2	Open Settings and complete company profile, logo, contact details, address and terms.
3	Open PDF Template Library and select a default quotation PDF template.
4	Open Currency & ROE and set base currency plus exchange rates.
5	Add route codes, airlines, hotels, visa types, vehicles, private transfers and sharing bus records.
6	Invite internal team members and assign permissions.
7	Invite travel agents if they need ticket booking access.
8	Create initial tasks for setup completion and daily operations.
9	Use chat/group chats for internal and agent communication.
10	Start creating quotations, group flights and hotel vouchers.

Workflow B - Create and send a package quotation

Step	Action
1	Open Quotations and choose Package Quote.
2	Enter client details and select currency.
3	Add visa, transport, hotel and ticketing sections using autocomplete data.
4	Review pricing, profit, adjustments, notes and client terms.
5	Preview branded PDF using selected PDF template snapshot.
6	Save as Draft or finalize as Sent.
7	Share PDF/link through WhatsApp or email, print/download if required.
8	When client confirms payment, update status and generate receipt.

Workflow C - Invite a travel agent to book tickets

Step	Action
1	Admin opens Team & Access or Agent Invites.
2	Enter travel agent email and send invite.
3	Travel agent accepts invite and joins allowed workspace.

Step	Action
4	Admin controls allowed modules/flight groups.
5	Agent books available seats from allowed group flights.
6	Ticketing team reviews booking, receives payment/reference and issues ticket.
7	Agent and team coordinate through chat/group chat.

Feature Directory & User Guidance

A quick reference for every major module

Module	What It Does	Best Used By
Dashboard	High-level overview of quotes, tasks, bookings and financial activity.	Owner, manager, admin.
Quotations	Package, ticket and AI quote creation with drafts and PDFs.	Sales, admin, owner.
PDF Templates	Select default quotation PDF design with agency branding preview.	Owner, admin.
Group Flights	Manage seats, PNRs, routes, bookings and issuance.	Ticketing, agents, admin.
Hotel Vouchers	Create branded hotel booking vouchers.	Sales, operations.
Hotels	Manage hotel master records.	Operations, admin.
Airlines	Manage airline data for tickets and group flights.	Ticketing, admin.
Visa Types	Manage visa options, pricing and requirements.	Visa desk, admin.
Route Codes	Map route codes to readable city/airport names.	Admin, ticketing.
Vehicles	Manage vehicle types and capacity.	Operations.
Private Transfers	Manage private transfer routes and rates.	Operations.
Sharing Bus	Manage shared transfer/bus routes and rates.	Operations.
Currency & ROE	Manage base currency and exchange rates.	Admin, accounts.
Bookings Ledger	Track booking/payment/ledger movement.	Accounts, owner.
Team & Access	Invite team, assign roles and permissions.	Owner, admin.
Tasks	Assign and track work across team members.	Manager, staff.
Chat	Team, agent and group communication.	All users.
Support & FAQ	Help center and custom request tickets.	All users.

FAQ & Best Practices

Answers for new agency users

Should we complete setup before creating quotations?

Yes. Complete company profile, PDF template, currency, hotels, airlines, route codes, visas and transport first so quotations and PDFs look professional.

Can quotation fields be left optional?

Most fields can be optional while drafting. Keep only essential fields required, such as quotation type, currency and at least a client name or phone where needed.

What happens when we change the default PDF template?

New quotations should use the new selected template. Existing quotations should keep the template snapshot saved at the time they were created.

How does the invite system work?

Admin enters an email and sends an invite. The user accepts and joins the agency/team or agent booking workspace, similar to Facebook-style invitations.

Why should we use tasks and chat inside the CMS?

Tasks and chat keep operations visible and reduce missed WhatsApp messages, scattered follow-ups and unclear responsibility.

When should we create a hotel voucher?

Create a hotel voucher after hotel booking is confirmed and the client or supplier needs a professional proof of stay.

What should owners review daily?

Dashboard, pending quotations, group flight availability, overdue tasks, new bookings, payments, ledger records and team/agent activity.

Implementation note

This guide presents the complete product vision and user workflow. When adding new modules, keep the same principles: agency-specific data, current user permissions, clean loading states, professional documents, and no unnecessary Firebase reads during local UI filtering.

Admin Launch Checklist

Use this before inviting real users and clients

Checklist Item	Completed?
Company profile and logo added in settings.	
Company email, phone, address and terms added.	
Default quotation PDF template selected.	
Base currency selected and ROE reviewed.	
Airlines, route codes and currencies imported/cleaned.	
Hotels, visa types, vehicles, private transfers and sharing bus data added.	
Group flights added with correct PNR, sectors, seats, baggage and fare.	
Team members invited and roles/permissions assigned.	
Travel agents invited only where booking access is required.	
Tasks created for operations team.	
Team chat and group chats available for coordination.	
Hotel voucher template and PDF tested.	
Quotation PDF, receipt and sharing flow tested.	
Ledger/payment workflow tested with a sample paid quotation.	
Support & FAQ reviewed for user onboarding.	

FlyQoute is designed to become the official operating layer of a travel agency: setup once, run daily operations professionally, and scale with teams, agents, bookings, quotations, vouchers, accounting and communication in one system.