



Zoho CRM Implementation Practices by Industry

Travel & Hospitality

A booking-centric CRM where a trip, its invoices, and its payments all live on one linked record instead of three disconnected places.

Custom Modules & Fields

- Custom Trips module linked to Contacts: destination, dates, party size, trip status stages (quote -> confirmed -> completed)
- Linked Invoices subform (deposit and final invoice lines) and Payments subform (balance calculated from billed vs. paid)
- Supplier/vendor and guide/service-provider detail per trip

Key Workflows & Automation

- Dynamic itinerary document generation from trip templates (Zoho Writer)
- Client-facing branded interactive quote/itinerary (Zoho Creator) in place of a static PDF
- Payment and deposit reminder automation
- Guide assignment, PO creation, and self-billing automation once service is confirmed

Integrations & Compliance Notes

- Zoho Books for sales orders and financial summaries per booking
- Zoho Analytics for commission and profit-per-booking calculation
- Zoho Campaigns for destination/offer marketing