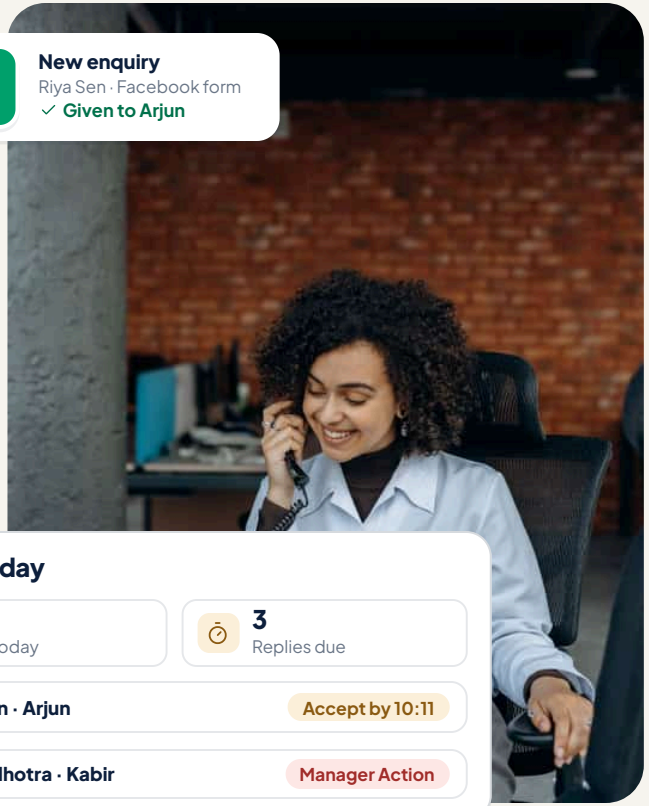
Travinci Ai

SMART LEAD AUTOMATION

Every lead deserves a follow-up.

Enquiries from ads, WhatsApp, calls and your website in one list, each with an owner and a reply clock. Built for **travel and service businesses.**

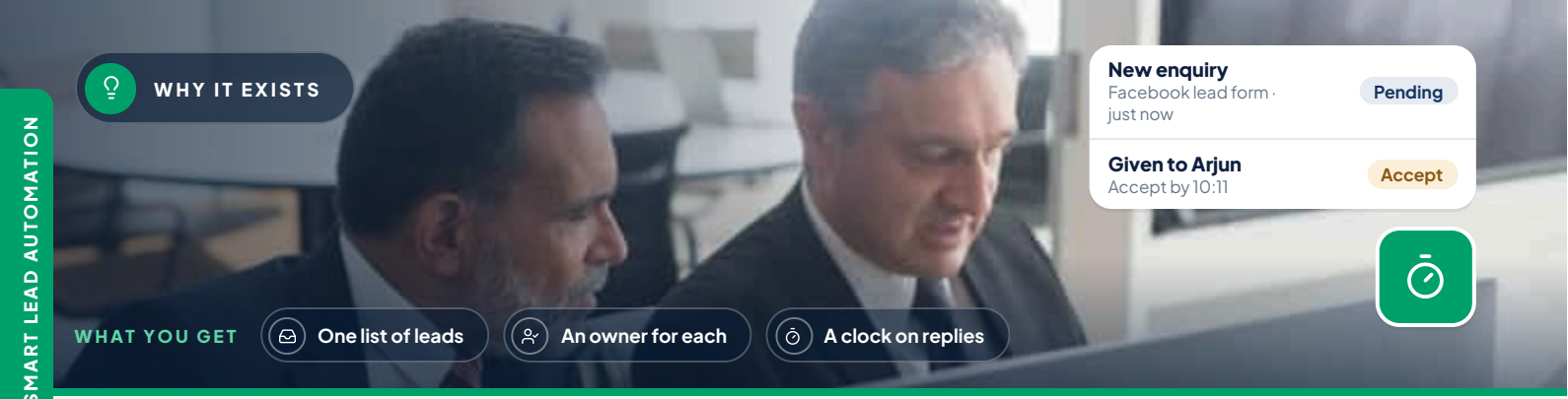
- One list of leads
- An owner for each
- A clock on replies



Travinci One · Marketing BOS · CRM OS · **YOU ARE HERE Smart Lead Automation** · Smart HRMS

PRODUCT GUIDE · SCREENS SHOW EXAMPLE DATA

travinci.ai



Enquiries go cold in silence. Make them visible.

The problem: enquiries sit unseen across channels, slow replies lose customers, and one person enquiring twice can get two salespeople. **The fix:** enquiries land in one list, each gets an owner and a reply clock, and a missed deadline goes back to a pool or up to a manager.

WHY TEAMS CHOOSE IT

One list
Ad forms, WhatsApp, website, calls, SMS and imports.

Automatic sharing
Waiting leads get an owner, oldest first.

Two clocks
One to accept the lead, one for first contact.

A way back
A missed lead can go to a pool or a manager.

One page per lead
Timeline, tasks, calls and reminders.

AI help
Summaries, next steps and reply drafts for a person to send.

THE FOUR STEPS

1. **Arrives** — New, or matched to a lead.
2. **Owner** — Shared out automatically.
3. **Clock** — Accept, then first contact.
4. **Missed?** — A pool, or the manager.

AI HERE

AI help

When enabled for your company

WHAT IT CAN DO

- Summarises a lead and suggests the next step
- Can call new leads, if you turn it on

WAITS FOR A PERSON

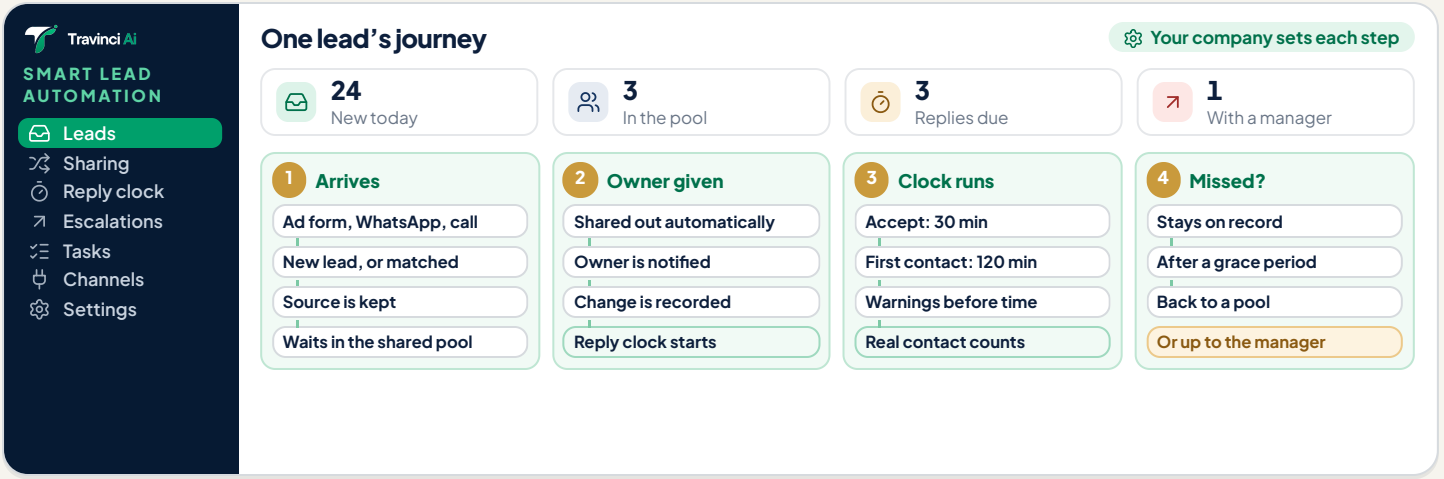
- Every reply draft: a person sends it
- Its suggested status, by default

WHO USES IT Sales teams · Businesses running ads · Managers

HOW IT WORKS · IN THE APP

From enquiry to first contact.

Screens show example data



1 An enquiry arrives
A new lead is made, or it joins that person's existing lead.

2 An owner is given
Automatic sharing gives waiting leads an owner, oldest first.

3 The reply clock runs
Accept in 30 minutes, then first contact within 120, by default.

4 Missed? It moves
After a grace period, back to a pool or up to the manager.

IN DETAIL · FOR TECHNICAL TEAMS

Set up in parts
Capture, sharing, clock and recovery are each set up for your company.

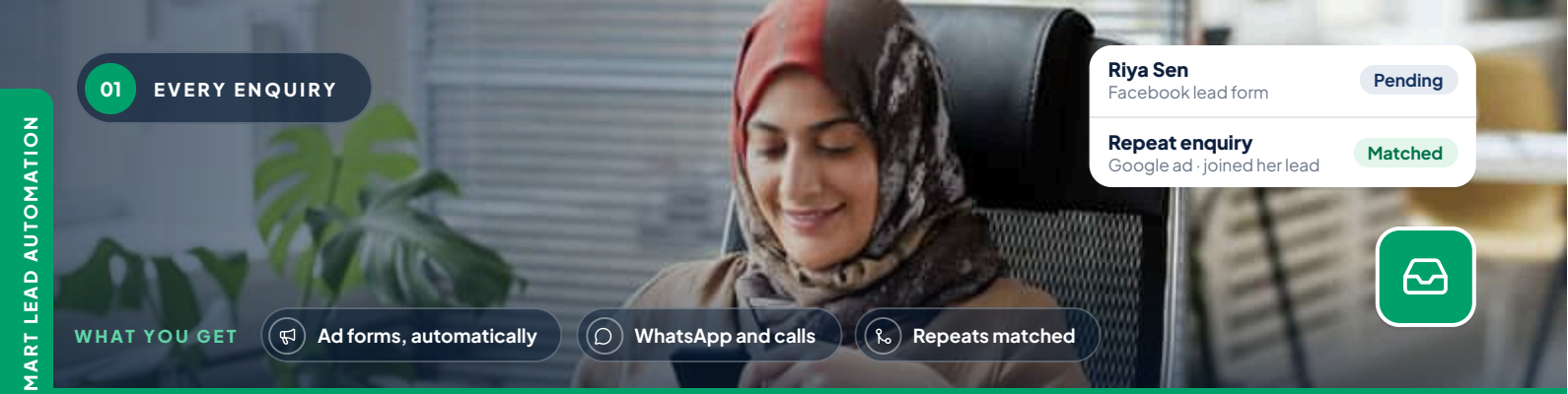
Owner notified
The new owner is told when a lead is assigned.

Shared pool
Incoming leads start with no owner and wait in a shared pool.

Timed from acceptance
The first-contact time starts when the owner accepts.

Regular runs
Automatic sharing runs at your company's set interval, once it is on.

On record
A missed deadline stays on record, even if the lead is rescued later.



Every enquiry. One list of leads.

The problem: enquiries arrive through ads, WhatsApp, the website and the phone, and the ones nobody sees go cold. **The fix:** connected channels feed one lead list, and a repeat ad enquiry or call joins the existing lead instead of starting again.

WHAT'S INSIDE

Ad lead forms
Facebook, Instagram and Google Ads lead forms arrive automatically.

WhatsApp
A message creates a lead when that chat has none.

Website forms
Post to your company's private link; each one becomes a lead.

Calls and SMS
Incoming and missed calls and incoming SMS, through connected providers.

Excel or CSV import
Duplicates are reviewed before the leads go in.

Where it came from
Ad leads keep their source, paid or organic, and campaign tags.

A DAY WITH IT

Day 1 · 09:40
Riya Sen fills a Facebook lead form. A lead appears.

Day 3 · 11:15
She fills a Google ad form with the same phone.

Same moment
It joins her lead as a repeat enquiry.

BUILT IN
Matching
Rules differ by channel

HAPPENS BY ITSELF
- Repeat ad leads join a match from the last 90 days
- Calls and SMS join the newest lead with that number

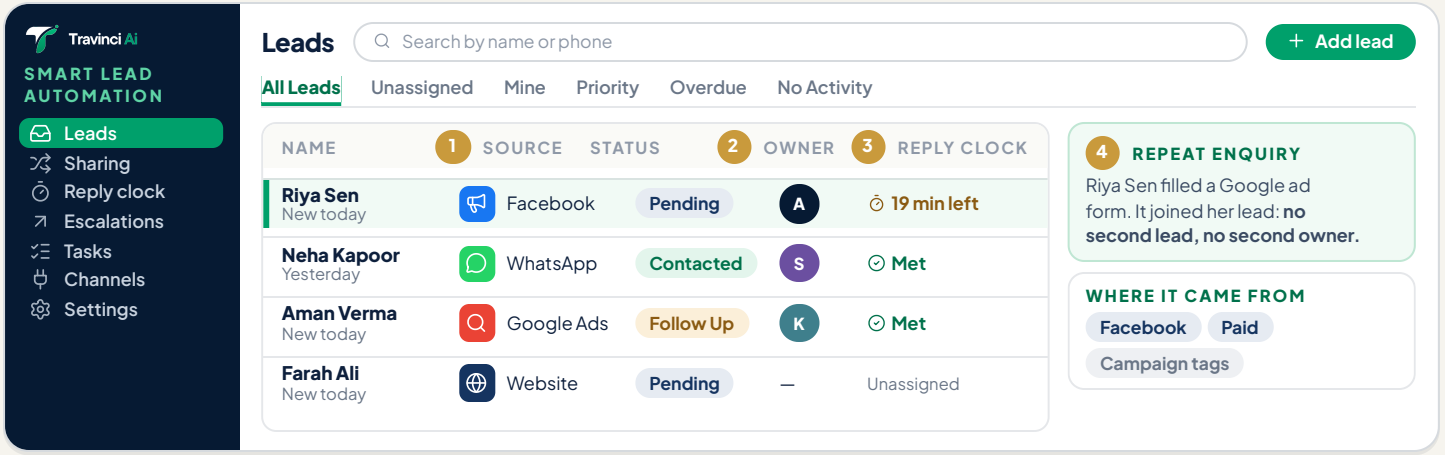
WAITS FOR A PERSON
- Adding by hand warns about a match
- Imports: review duplicates first

WHO USES IT Sales teams · Marketing teams · Ad-led businesses

01 EVERY ENQUIRY · IN THE APP

How leads come in.

Screens show example data



1 Connect channels

Ad forms, WhatsApp numbers and phone lines are connected and approved.

2 A lead appears

It starts with no owner, waiting in the shared pool.

3 Repeats are matched

Ad leads match on phone or email within 90 days.

4 Find it fast

Views for mine, priority, overdue, unassigned and no activity.

IN DETAIL · FOR TECHNICAL TEAMS

Approved first
Each Page, ad form and WhatsApp number is claimed and approved before leads flow.

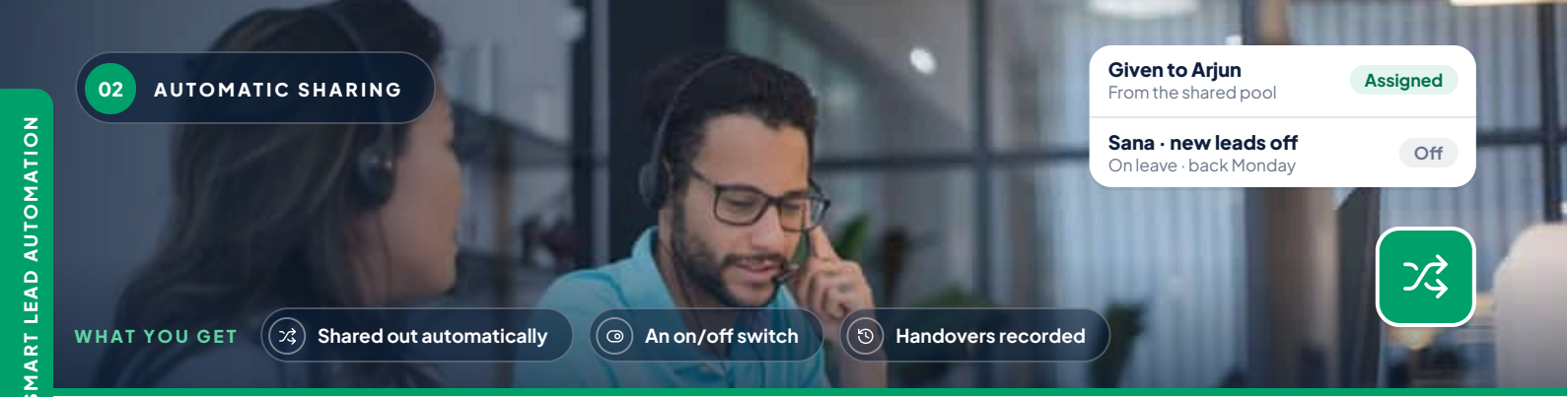
Imports
Imported leads belong to the person importing them.

Closed leads
Ad leads: one already lost, uninterested or won is not matched.

Emailed enquiries
Become a lead when someone clicks the AI's suggested action.

Website forms
Never matched: a repeat website enquiry creates a second lead.

Filters
Status, quality, source, paid or organic, and dates.



Waiting leads get an owner. Without anyone asking.

The problem: leads wait in a shared inbox until someone picks them up, and nobody knows who is on leave or who holds what. **The fix:** once your company turns on automatic sharing, waiting leads get an owner, oldest first, and every change of owner is recorded.

WHAT'S INSIDE

Automatic sharing
Oldest unowned leads first, at your company's set interval.

Eligible people
Leads rotate among active people who pass the team's checks.

On/off switch
People you permit can stop receiving new leads, with a reason.

You choose who receives
Team leads, team members, or members then leads.

Fallback person
If a team's rotation is empty, a named person can receive the lead.

Handover history
From whom, to whom, by whom, and why.

A DAY WITH IT

09:40
Riya's lead arrives with no owner.

09:41
At its next run, automatic sharing gives it to Arjun.

09:41
He is notified and his accept clock starts.

BUILT IN
Sharing rules
Set for your company

HAPPENS BY ITSELF
- Serves the oldest unowned leads first
- Notifies the new owner

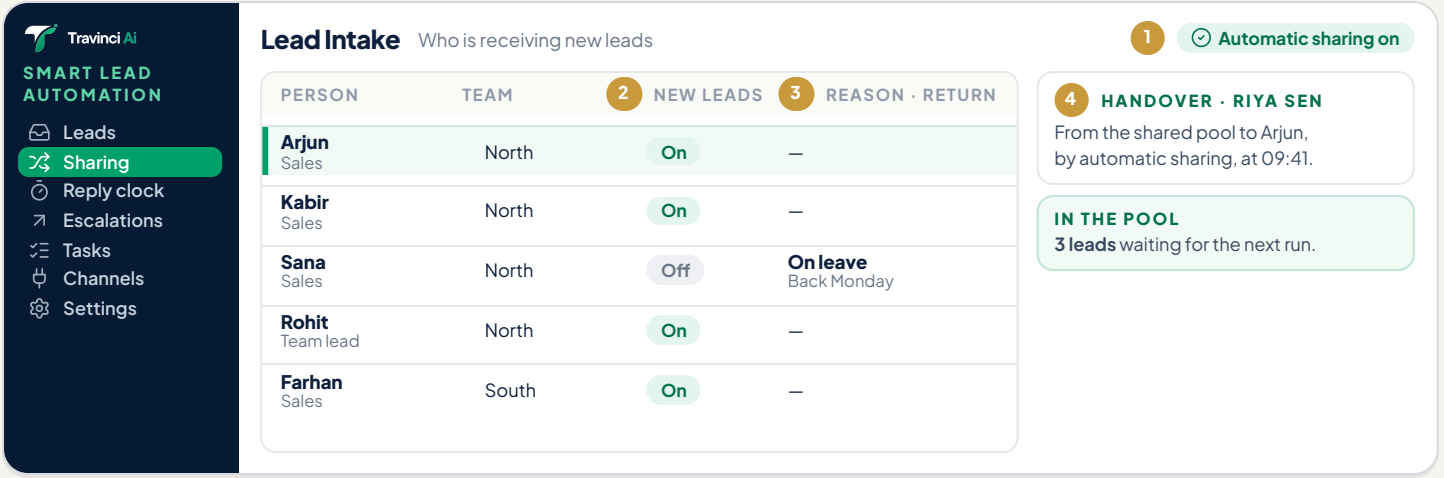
WAITS FOR A PERSON
- Changing an existing owner needs a reason
- Managers assign within their own team

WHO USES IT Sales managers · Team leads · Sales teams

02 AUTOMATIC SHARING · IN THE APP

How sharing works.

Screens show example data



1 Choose who receives
Team leads, members, or members then leads.

2 Leads are shared
Waiting leads rotate among eligible people.

3 The owner is told
The new owner is notified when the lead is assigned.

4 People can step out
Switch off new leads with a reason and an optional return date.

IN DETAIL · FOR TECHNICAL TEAMS

A strict switch
By default the on/off switch is not a hard block; a company setting makes it strict.

Who can assign
Managers within their own team; admins and lead routers to anyone.

Leads already held
Switching off affects future leads only.

Bulk assign
Leads can be assigned in bulk.

Re-sharing skips them
Automatic re-sharing always skips people who are switched off.

Every change recorded
Each owner change keeps who made it and why.

03 THE REPLY CLOCK



WHAT YOU GET · Two clocks · Early warnings · Your hours

A reply clock on every lead.

The problem: nobody can see how long a new lead has waited, and slow replies are only noticed once the customer has gone. **The fix:** when your company turns it on, each owner gets one clock to accept the lead and one to make real contact.

WHAT'S INSIDE

Accept clock
30 minutes to accept the lead, by default.

First-contact clock
120 minutes from accepting, by default.

Warnings
By default, at 50% and 80% of the first-contact time.

Working calendar
Your company's weekly hours, holidays and time zone.

Your own times
Your company sets its own accept and first-contact times.

Who sees what
Owners get an action list; managers get a queue, most urgent first.

A DAY WITH IT

09:41
Arjun gets Riya's lead. Accept is due at 10:11.

09:52
He accepts and calls. No answer, so it does not count.

09:55
An approved WhatsApp template is delivered. Clock met.

BUILT IN
What counts
After the owner accepts

COUNTS AS CONTACT
- A call answered for 15 seconds or more, by default
- A delivered WhatsApp or a sent email

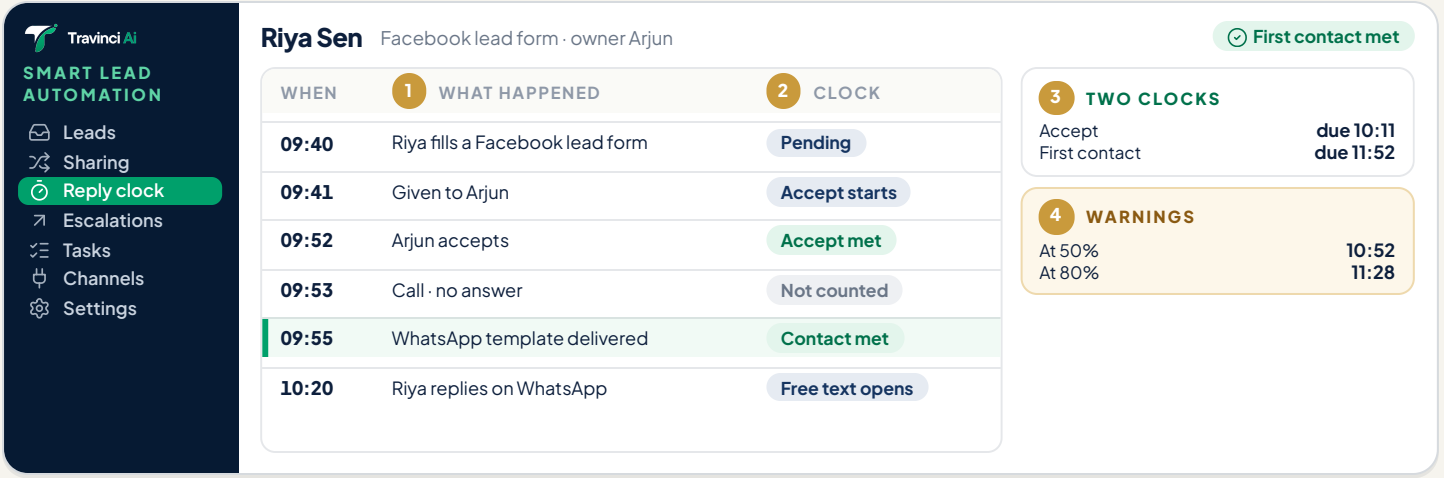
NEVER COUNTS
- Notes, edits and tasks
- Incoming messages and failed sends

WHO USES IT Sales teams · Team leads · Managers

03 THE REPLY CLOCK · IN THE APP

How the clock works.

Screens show example data



1 Turn it on
The clock stays off until your company turns it on.

2 Accept the lead
The owner accepts first, within 30 minutes by default.

3 Make real contact
Within 120 minutes of accepting, by default.

4 See it coming
Warnings fire before the first-contact time runs out.

IN DETAIL · FOR TECHNICAL TEAMS

Nights and holidays
With a calendar, holidays are skipped and after-hours leads start at the next opening.

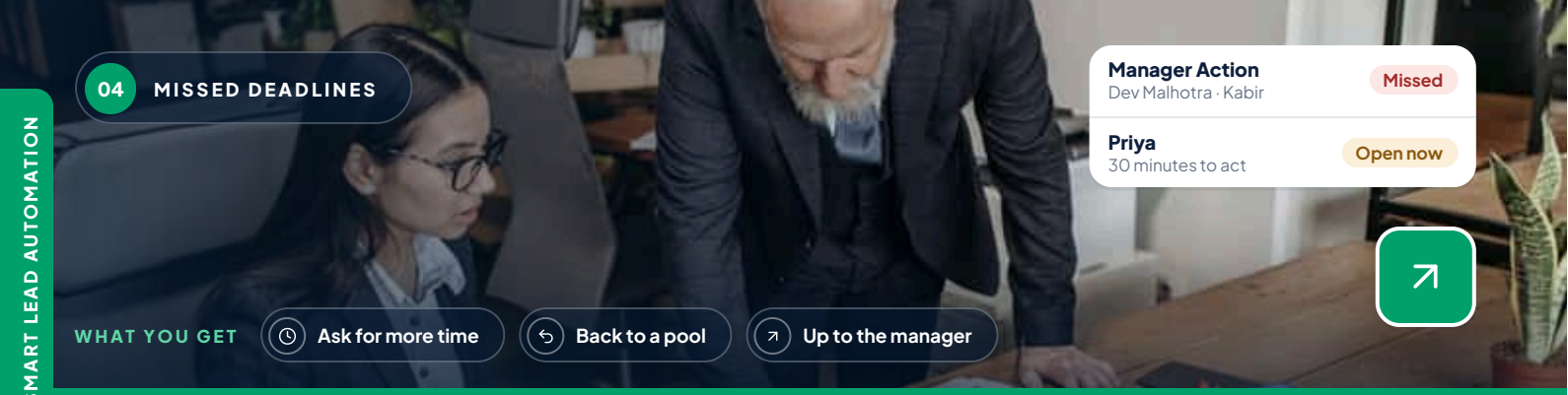
Your settings
Whether emails and AI calls count is up to your company.

No calendar?
The clocks run 24 hours a day, every day.

After acceptance
Contact counts only once the owner has accepted.

Phone calls
Count only if connected through your main calling provider.

WhatsApp rules
Free text only within 24 hours of the customer's last message; templates at any time.



Missed a deadline? The lead moves on.

The problem: a lead nobody replied to just sits with the same person, and by the time a manager hears about it, the customer has gone.
The fix: if your company switches it on, a missed lead returns to a pool after a grace period, or goes up to the owner's manager.

WHAT'S INSIDE

Ask for more time
The owner picks a reason from a fixed list.

Someone decides
The assigner if permitted, then a manager above, then a company admin.

Grace period
Set by your company. Real contact can cancel the return after a first-contact miss.

Back to a pool
Re-shared immediately, after a delay, or held.

Up to the manager
30 minutes to act by default: reassign, take it or escalate.

Company admin review
If the managers miss too, it reaches a company admin.

A DAY WITH IT

- **14:00** Automatic sharing gives Kabir a lead.
- **14:30** He has not accepted. The miss is recorded.
- **After grace** The lead goes up to Priya, his manager.

BUILT IN
If switched on
Your company chooses the route

HAPPENS BY ITSELF
- Automatic re-sharing never picks the person who missed it
- It also skips people who are switched off

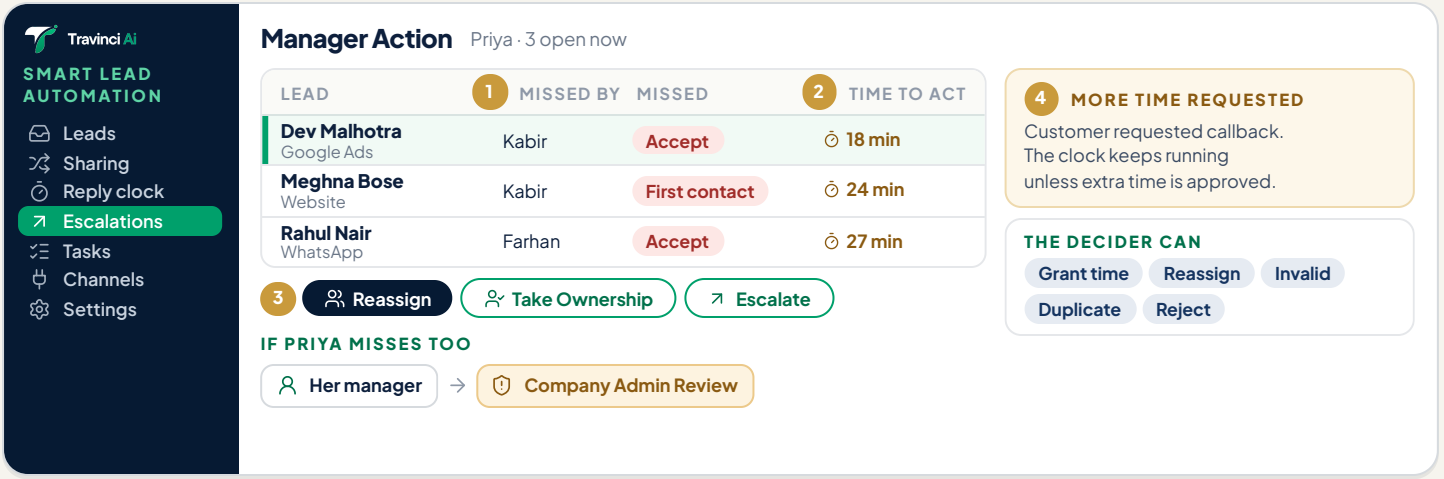
WAITS FOR A PERSON
- Nobody eligible: Manual Review
- Extra time needs approval

WHO USES IT Managers · Team leads · Owners

04 MISSED DEADLINES · IN THE APP

How recovery works.

Screens show example data



1 Deadline passes
The miss is recorded, even if the lead is rescued later.

2 Grace period
After a first-contact miss, real contact can cancel the return.

3 The lead moves
To a pool for re-sharing, or up to the owner's manager.

4 A person acts
Reassign it, take it, or escalate it with a reason.

IN DETAIL · FOR TECHNICAL TEAMS

Asking is not stopping
Asking for more time does not pause the clock.

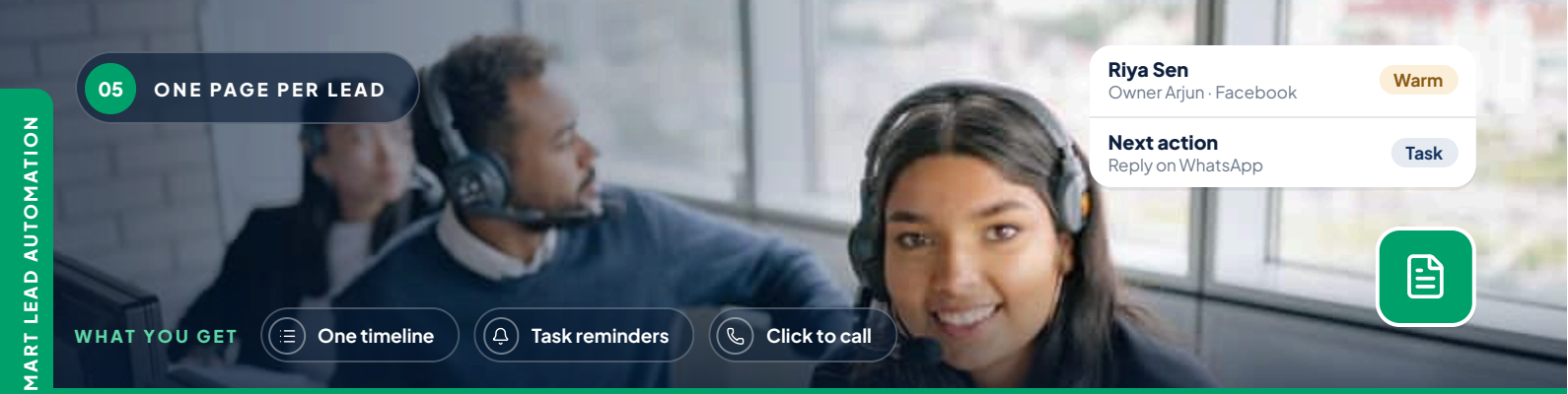
Approved time only
Only approved extra time moves the deadline.

What the decider can do
Grant time, reassign, mark invalid or duplicate, or reject.

Overrides
A person can override re-sharing, and it is recorded.

Climbing
If the manager misses too, it climbs the managers.

A fair record
A manager's miss is never counted against the seller.



One page for each lead. The story so far.

The problem: calls, messages and promises live in different places, so the next person starts from zero. **The fix:** each lead has one page, with a timeline of calls, emails, WhatsApp, notes, tasks and status changes.

WHAT'S INSIDE

Timeline
Calls, emails, WhatsApp, notes, tasks and status changes, newest first.

Tasks
Calls, meetings, emails, WhatsApp or follow-ups, each with a due date.

Reminders
When a task is due, and again at 24 hours late.

Click to call
Connects the seller's phone to the customer and records the call.

Calls written up
Recorded, connected calls get a transcript, summary and action items.

Lost needs a reason
Such as budget, competitor or no response.

A DAY WITH IT

- **10:20** Riya replies on WhatsApp.
- **10:26** Arjun asks AI Copilot for a draft, checks it and sends it.
- **Later** A follow-up task reminds him when it is due.

AI HERE

AI Copilot

When enabled for your company

WHEN A PERSON ASKS

- Summarises the lead and its conversation
- Suggests the next best step

WAITS FOR A PERSON

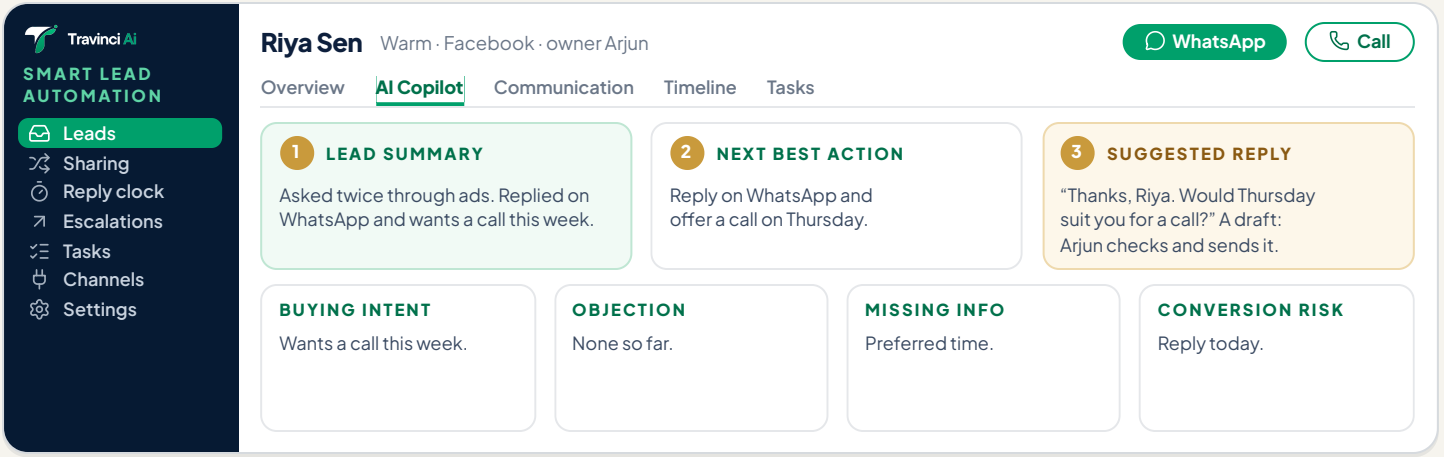
- Reply drafts: Copilot never sends anything
- A person approves every draft

WHO USES IT Sellers · Team leads · Managers

06 AI HELP · IN THE APP

AI does the reading. People send.

Screens show example data



1 Summarise
Copilot sums up the lead and its conversation.

2 Suggest
It suggests the next step and flags the risk of losing the lead.

3 Draft
Reply drafts need a person's approval.

4 Call, if you allow it
New leads can get an automatic AI call after a set delay.

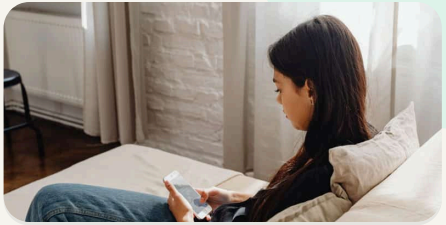
IN DETAIL · FOR TECHNICAL TEAMS

- **Only what you may see** — Copilot uses only what the signed-in person may see.
- **After a call** — A summary, sentiment and follow-up tasks.
- **Also flags** — Buying intent, objections and missing information.
- **Permissions** — Detailed lead permissions, one per action, by role or by person.
- **Quiet hours** — By default, AI calls avoid 21:00 to 09:00 India time.
- **Company isolation** — Every lead belongs to one company; asking for another company's lead returns not found.
- **Checks first** — Do-not-call status, call consent and rate limits.
- **Incoming events** — Facebook, WhatsApp and AI-call events are signature-checked; company links use a private token.

EXAMPLE · RIYA'S LEAD

One lead. Start to finish.

Riya Sen fills a Facebook lead form. Here is what happens next, with automatic sharing, the reply clock and recovery switched on, and what happens when a deadline is missed.



Two leads

1 RIYA'S LEAD · ARJUN

09:40	Riya fills a Facebook lead form	Pending
09:41	Automatic sharing gives it to Arjun	Accept by 10:11
09:52	He accepts and calls: no answer	Not counted
09:55	A WhatsApp template is delivered	Contact met
10:20	Riya replies on WhatsApp	Free text opens
10:26	Copilot drafts, Arjun checks and sends	Sent
Day 3	A Google ad form, the same phone	Repeat enquiry
Result	No second lead, no second owner	One lead

2 A MISSED LEAD · KABIR

14:00	Automatic sharing gives it to Kabir	Accept by 14:30
14:30	He has not accepted	Missed
Grace	Your company's grace period ends	Moves on
Next	It goes up to Priya, his manager	Manager Action
30 min	Priya reassigns it, with a reason	New owner
After	Kabir's miss stays on record	On record
If not	If Priya misses too, it goes to her manager	Climbs
Last	Company Admin Review	Admin

SWITCHED ON HERE Connected channels · Automatic sharing · Reply clock · Working calendar · Manager route · AI Copilot

1 Sharing
Waiting leads get an owner, oldest first.

2 Real contact
A call with no answer does not count.

3 WhatsApp rules
Templates only, until the customer writes.

4 Recovery
Your company chooses the route.

RUNS ON Ad forms · Sharing · WhatsApp · Calls

People decide: Arjun accepts and sends every reply; Priya, the manager, reassigns a missed lead. Example data.

YOUR QUESTIONS, ANSWERED

What every buyer asks us. Straight answers.

Which channels connect?

Facebook, Instagram and Google Ads lead forms, WhatsApp, website forms, calls, SMS and Excel. Each is connected and approved during setup.

Nights and holidays?

With a working calendar, the clock skips holidays and after-hours leads start at the next opening. With none, it runs day and night.

Someone on leave?

People you permit can switch off new leads, with a reason and return date. Leads they hold stay with them. A company setting makes the switch strict.

What counts as a reply?

After accepting: a call answered for 15 seconds or more by default, a delivered WhatsApp, or a sent email if your company counts it. Notes and tasks never do.

Can a seller ask for more time?

Yes, with a reason. The person who assigned it decides first, if permitted. Asking does not pause the clock.

What does the AI do by itself?

Copilot works when asked: it summarises and drafts, and a person sends. With AI calls on, it can call new leads after consent and do-not-call checks.

What stops duplicates?

Ad leads join a match from the last 90 days; calls and SMS join the newest lead with that number. Website forms are not matched.

Is my data separate?

Yes. Every record belongs to one company, and duplicate matching never crosses companies.

Travinci Ai

Next stop: your demo.

See it on your own enquiries, with your channels, your team and your working hours.

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Book a demo

Scan the code, or talk to our team at the stand.

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1. Book a demo
2. Pick what you need
3. Set it up with our team

START HERE
Your demo

Some features are switched on for each company during setup. Screens show example data. Photos: Pexels.

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