Travinci Ai

TRAVINCI AI

Automate it. Grow it. Run it.

Travinci One gives you a personal assistant and an AI workforce, **Marketing BOS** grows your brand and **CRM OS** runs your business. AI helps at every step; **you stay in charge.**

- AI employees
- Flows from plain words
- You stay in charge



PAGES 4–17 Travinci One

PAGES 18–29 Marketing BOS

PAGES 30–51 CRM OS

CONTENTS

Three products. Where each one is.

Each product has its own section, its name at the start and its own tab on the page edge. Read one, or all three.

PRODUCT 1 OF 3

Travinci One

Pages 4–17

A personal assistant for you and AI employees for your business, in any industry.

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PRODUCT 2 OF 3

Marketing BOS

Pages 18–29

An AI marketing team that reads your market, writes in your voice and makes the video.

Why it exists	18
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PRODUCT 3 OF 3

Travinci CRM OS

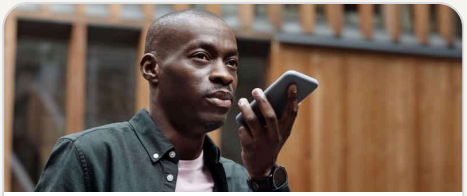
Pages 30–51

Your whole business in one system, with AI employees built in at every step.

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THREE PRODUCTS

Which product does what.



Travinci One

Product 1 of 3 · pages 4–17

FOR
Individuals, and businesses in any industry

WHAT IT DOES
A personal assistant and AI employees that take action across your connected systems.

ITS AI
You create the AI employees: any role and any flow, described in plain words.



START WITH
Personal assistant · AI employees · Flow Builder · Knowledge Hub



Marketing BOS

Product 2 of 3 · pages 18–29

FOR
Marketing teams, founders and agencies

WHAT IT DOES
Reads your market, writes in your brand's voice, makes the video and publishes it.

ITS AI
Marketing Brain and seven AI specialists; you decide what goes live.

START WITH
Brand · Discover · Create · Publish



Travinci CRM OS

Product 3 of 3 · pages 30–51

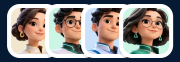
FOR
Travel companies and other growing service businesses

WHAT IT DOES
Leads, quotes, trips, payments and your team in one system.

ITS AI
AI employees come built in: Marx, Anaya, Hexa and John work inside its modules.



START WITH
Leads · Quotes · Operations · Finance · HRMS



The same four AI employees appear in two products. In Travinci One they show the AI employees you create for any job; in CRM OS they come ready inside its modules. Use one product, or all three.

PRODUCT 1 OF 3 · PAGES 4–17

Travinci One

OVERVIEW

For you	a personal assistant
For your business	AI employees
For any industry	flows from plain words

WHAT YOU GET · A personal assistant · An AI workforce · Real actions

I take action!



One platform. Two ways to work.

The problem: calls, emails, meetings, bookings and follow-ups are spread across separate apps, and someone has to do each step by hand. **The fix:** Travinci One gives a person their own AI assistant and a business named AI employees, and both act across your connected systems.

WHAT'S INSIDE

A personal assistant
Your own named assistant on calls, WhatsApp and email.

AI employees
Named roles with your knowledge, tools and workflows.

AI Flow Builder
Describe a process in plain words; AI builds the workflow.

Knowledge Hub
Your knowledge and systems linked; the AI sets up the rest.

Every channel
WhatsApp, web chat, voice calls, robots and kiosks.

You stay in control
Permissions, approvals and a log of every action.

HOW IT WORKS

1 · Describe the work
In plain words, like briefing a new teammate.

2 · Assign your AI employee
Attach the workflow to a named AI employee.

3 · Travinci One coordinates
Calls, messages, bookings and updates, step by step.

4 · A person decides
What you mark for approval waits for you.



AI EMPLOYEES HERE

Your AI team

ON THEIR OWN
- Act across calendar, email, CRM and bookings
- Use only your approved knowledge and tools

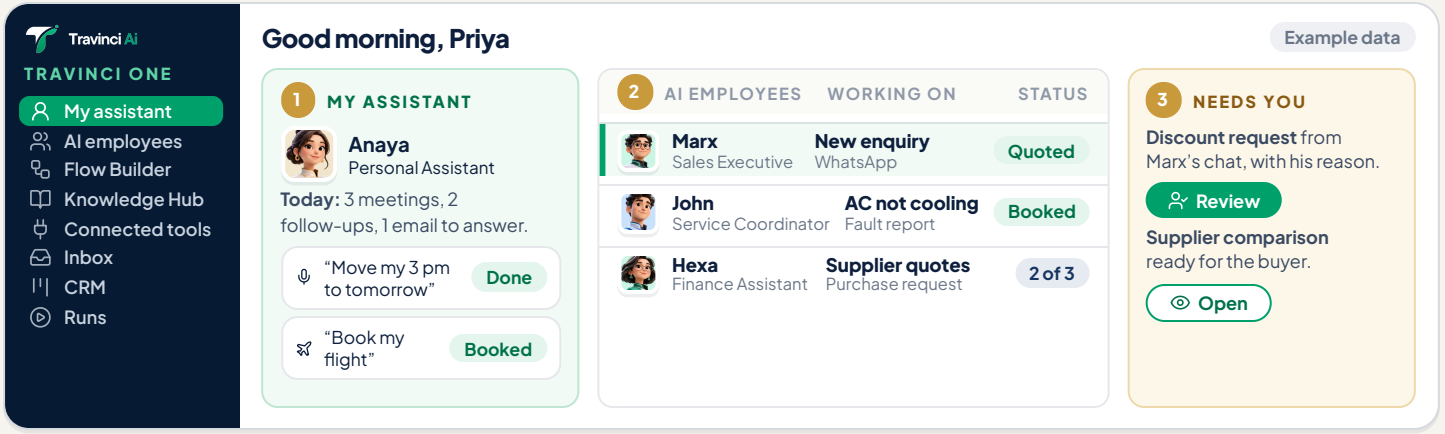
WAITS FOR A PERSON
- Any action you mark for approval
- Anything outside their permissions

WHO USES IT Individuals · Owners · Teams in any industry

AT A GLANCE · IN THE APP

You and your AI team. One app.

Screens show example data



1 Describe the work

In plain words, like briefing a new teammate. The AI Flow Builder turns it into a workflow.

2 Assign your AI employee

Attach the workflow to a named AI employee, or simply ask your own assistant.

3 Travinci One coordinates

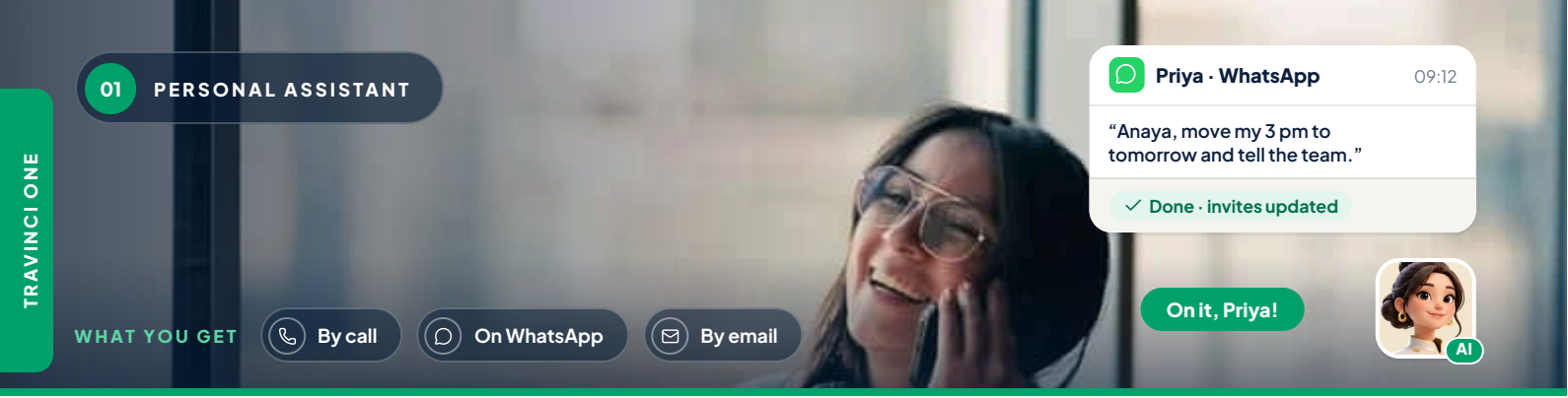
Calls, messages, bookings and updates run step by step across your connected systems.

4 You decide

Anything you mark for approval waits for a person, with the reason and a summary.

IN DETAIL · FOR TECHNICAL TEAMS

- **Journeys** — Multi-step follow-ups, reminders and handoffs, started by events.
- **A self-filling CRM** — Every conversation lands on a lead, kept up to date.
- **Outbound AI calling** — Call now, schedule a call, or let a campaign call leads.
- **Sales in the chat** — Live options, a final quote and a secure payment link, after approval.
- **Campaigns** — Choose leads and an agent, launch, and watch every outcome.
- **Wallet and limits** — A booking wallet, separate from AI credits, with holds and refunds.
- **Email rules** — Rules that notify, draft or act on incoming email.
- **Plans and credits** — Feature-based plans, prepaid AI credits and usage metering.



Your own assistant. Just ask.

The problem: your day goes on calls, emails, meetings and bookings, each in a different app. **The fix:** tell Anaya what you need by call, WhatsApp or email. She does it through your connected accounts, within the permissions you set.

WHAT SHE DOES FOR YOU

Calls for you
Calls to confirm or follow up, and tells you the answer.

Meetings arranged
Checks your calendar, books the slot and sends Google Meet invites.

Email, handled
Drafts, labels and archives in Gmail or Outlook; sends after your PIN.

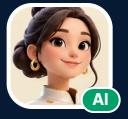
Flights and hotels
Finds live options and books within your budget.

A daily briefing
Your meetings, follow-ups and emails, every morning.

From any phone
Lost your phone? Call from any number; she checks your PIN first.

A DAY WITH ANAYA

- **08:00** The daily briefing: 3 meetings and 2 follow-ups.
- **10:30** On WhatsApp: “Arrange a meeting with the client and confirm.”
- **10:40** The meeting is booked, confirmed by phone and the invite sent.
- **17:00** The meeting summary is ready.



AI EMPLOYEE HERE

Anaya

Personal Assistant
Works for Priya

DOES ON HER OWN

- Calls, emails, books and reminds on your behalf
- Uses only the accounts you connect

WAITS FOR A PERSON

- Without your PIN, she shares nothing
- Spends only within your limits; you choose the hotel

WHO USES IT Individuals · Managers · Professionals

EXAMPLE · EMERGENCY, FROM ANY PHONE

Phone lost? Call from any phone.

Priya's phone is lost on a work trip. She calls Anaya from a colleague's phone; Anaya checks her PIN, books the flight and hotel, and sends the tickets where she asks.



Travinci Ai

TRAVINCI ONE

- My assistant
- AI employees
- Flow Builder
- Knowledge Hub
- Connected tools
- Inbox
- CRM
- Runs

Anaya Incoming call · a new number

PIN verified

1 PRIYA CALLS

"Anaya, it's Priya. I've lost my phone. Book tonight's flight to Mumbai and a hotel near the airport, and WhatsApp the tickets to this number."

2 THE PIN CHECK

A new number: no details shared yet
Her PIN: correct, so Anaya can act

3 WHAT ANAYA DOES

1 Verify
- Call from a new number
- Asks for her PIN
- PIN correct
- Wrong PIN → nothing shared

2 Book
- Tonight's flights
- Booked within budget
- Hotel near the airport

3 Send
- By email or WhatsApp
- To anyone she names

4 OUTCOMES

Flight · 21:40	Booked
Hotel	Booked
Tickets · WhatsApp	Sent

ON THE CALL

Anaya: PIN correct. Booked; tickets sent on WhatsApp.
Priya: Thank you, that saved my trip!

1 Priya calls
From any phone, any number, anywhere.

2 The PIN check
No PIN, no access: nothing is said or done.

3 What Anaya does
Verify, book, send, within Priya's limits.

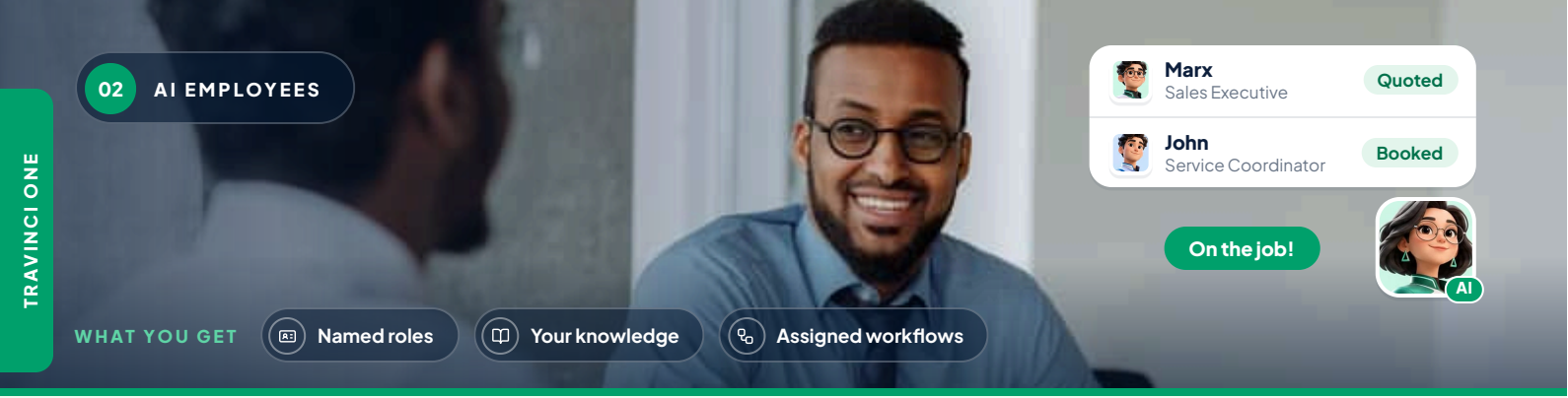
4 Outcomes
Booked and sent before the call ends.

RUNS ON

Any phone · call | PIN check | Flights and hotels | Email or WhatsApp

Without the PIN, Anaya never talks about Priya's details or acts for her. Spending stays within her limits. Example data.

02 AI EMPLOYEES



WHAT YOU GET · Named roles · Your knowledge · Assigned workflows

Hire an AI employee. Give it a job.

The problem: growing teams lose their day to the same calls, follow-ups and updates, and every new hire takes time to train. **The fix:** create named AI employees with clear roles. Each uses your approved knowledge, connected tools and assigned workflows to carry out the work.

ROLES YOU CAN CREATE

Sales Executive
Enquiries, quotes and follow-ups. Like Marx.

Finance Assistant
Reminders and supplier quotes. Like Hexa.

Procurement Assistant
Supplier quotes and a clear comparison.

Service Coordinator
Complaints, technician visits, follow-ups. Like John.

Personal Assistant
Meetings, email, calls and travel. Like Anaya.

Customer Support Executive
Answers on every channel, day and night.

HIRE ONE IN FOUR STEPS

1. **Choose a role**
   A job title, goals, tone and the person it reports to.
2. **Give it knowledge**
   Your approved answers, policies and files.
3. **Attach a workflow**
   The job it runs, with the tools it may use.
4. **Watch it work**
   Every step in the AI work center; exceptions reach you.



AI EMPLOYEE HERE

Marx
Sales Executive
Reports to Priya

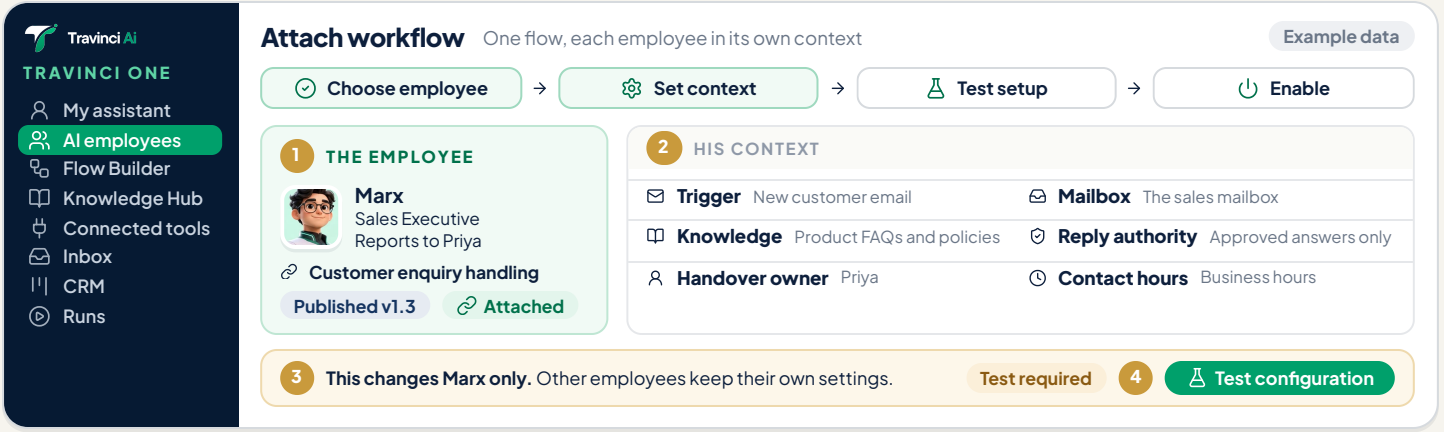
DOES ON HIS OWN
- Answers, qualifies and quotes on WhatsApp and email
- Keeps the CRM up to date as he works

WAITS FOR A PERSON
- Discounts and price changes go to Priya
- Money moves only after approval

FOR ANY BUSINESS Sales · Service · Procurement · Support

Attach a flow. Give it a job.

Screens show example data



1 Choose the employee

Pick an AI employee, or create one with a job title, goals, tone and the person it reports to.

2 Set its context

Trigger, mailbox, knowledge, reply authority, handover owner and contact hours, for this employee only.

3 Test the setup

A simulator runs the real agent and shows the knowledge it used, before anything goes live.

4 Enable

Switch it on. One flow can serve several AI employees, each with its own accounts and context.

IN DETAIL · FOR TECHNICAL TEAMS

Ready-made templates
Personal Assistant, Travel, Healthcare, Property or Custom, with a qualification checklist.

Actions with approval
AI employees act on connected tools; any action can need a person first.

Better instructions
AI suggests clearer instructions for each agent, for you to review.

Versions you can restore
Review a diff, publish, and restore any earlier version.

Server-side permissions
Which lead fields each AI employee may read or write, enforced on the server.

Running chats stay stable
Running conversations keep the version they started with.

EXAMPLE · PERSONAL ASSISTANT

One message. It gets arranged.

Priya, a sales manager, sends Anaya one WhatsApp message. Anaya checks the calendar, books the meeting, calls the client to confirm, sends the confirmation and books the flight, all within Priya's limits.



Travinci Ai

TRAVINCI ONE

- My assistant
- AI employees
- Flow Builder
- Knowledge Hub
- Connected tools
- Inbox
- CRM
- Runs

Anaya

Personal Assistant · works for Priya

Asked on WhatsApp

1 PRIYA ASKS

"Anaya, check my calendar, arrange a meeting with the client, and send the confirmation. Book my flight too."

2 CONNECTED ACCOUNTS

Calendar · Gmail · WhatsApp
Travel budget and limits

3 WHAT ANAYA DOES

Meeting and confirmation

- Check the calendar
- Book Thursday 11:00
- Call Meera Iyer, Head of Admin
- Send the confirmation
- No answer → follow up

Travel

- Find flight options
- Book within budget
- Hotels near the client
- Hotel: Priya chooses

4 OUTCOMES

Meeting · Thu 11:00	Booked
Meera Iyer	Confirmed
Flight	Booked
Hotel	Priya chooses

ON THE CALL

Meera Iyer: Thursday at 11 works.
Anaya: Confirmed. Invite sent.

1 Priya asks
By WhatsApp, a call or email, in plain words.

2 Connected accounts
Only the calendar, mailbox and limits Priya allows.

3 What Anaya does
Two tracks side by side; a missed call is followed up.

4 Outcomes
What is done, and what waits for Priya.

RUNS ON

WhatsApp · request | Calendar · meeting | AI calls | Flights and hotels

Priya decides: Anaya stays within her permissions and spending limits, and leaves the choice of hotel to her. Example data.

EXAMPLE · SERVICE COORDINATOR

From complaint to finished visit.

Ravi Menon, a homeowner, reports that his air conditioner has stopped cooling. John, the Service Coordinator, runs the whole job, from the first call to the follow-up after the visit.



Travinci Ai

TRAVINCI ONE

- My assistant
- AI employees
- Flow Builder
- Knowledge Hub
- Connected tools
- Inbox
- CRM
- Runs

John Service Coordinator · complaint → visit → follow-up

Workflow · version 1

1 THE COMPLAINT

"My AC has stopped cooling. It is still under warranty." Ravi Menon, on WhatsApp

2 CONNECTED SYSTEMS

Knowledge Hub: service procedures
Tools: assets, warranty, technician diary, CRM

3 WHAT JOHN DOES

1 Collect
- Complaint received
- Calls Ravi for details
- Warranty checked

2 Schedule
- Technician diary
- Imran accepts
- Visit booked
- No slot → Kavita

3 Close
- CRM updated
- Follow-up after visit
- Not fixed → Kavita

4 OUTCOMES

Warranty	Valid
Imran Khan	Accepted
Visit · Thu 3 PM	Booked
CRM case	Updated
Follow-up	After visit

ON THE CALL

Imran: I can take the 3 PM visit.
John: Booked. I will let Ravi know.

1 The complaint
On WhatsApp, a call or email, at any hour.

2 Connected systems
Procedures in the Knowledge Hub; assets, diary and CRM.

3 What John does
Collect, schedule, close. Gold steps go to a person.

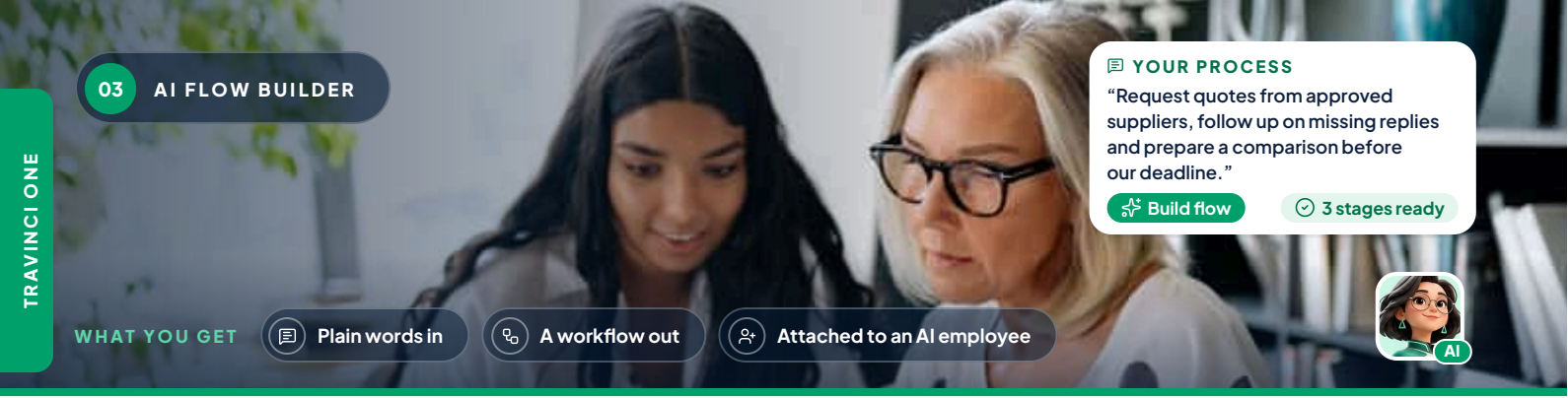
4 Outcomes
Where every job stands, step by step, in Runs.

RUNS ON

- WhatsApp · complaint
- AI calls
- Technician diary
- CRM · case

People decide: Imran Khan, Field Technician, accepts the visit; Kavita Rao, Service Manager, gets what John cannot settle. Example data.

03 AI FLOW BUILDER



WHAT YOU GET · Plain words in · A workflow out · Attached to an AI employee

Describe the process. AI builds the workflow.

The problem: every business has processes that follow the same steps, and setting them up used to need developers. **The fix:** describe the process in plain language. The AI Flow Builder turns it into a workflow you review, customise and attach to an AI employee.

WORKS IN ANY INDUSTRY

Service
Complaint, details, technician, visit and follow-up.

Procurement
Supplier quotes requested, chased and compared.

Education
Course questions, documents and a complete application.

Travel and meetings
Meetings, flights, hotels and special requests.

Property
Buyer needs, a shortlist and a confirmed viewing.

Customer support
Answers from approved knowledge; a person when it is missing.

FIVE MINUTES WITH IT

09:00
You type the process: request supplier quotes, chase missing replies, compare.

09:01
Travinci One builds a workflow in three stages: request, collect, compare.

09:05
You review it, attach it to Hexa and switch it on.



AI EMPLOYEE HERE

Hexa
Finance Assistant
Finance team

DOES ON HER OWN

- Runs the workflows attached to her, step by step
- Emails, messages and calls suppliers inside the flow

WAITS FOR A PERSON

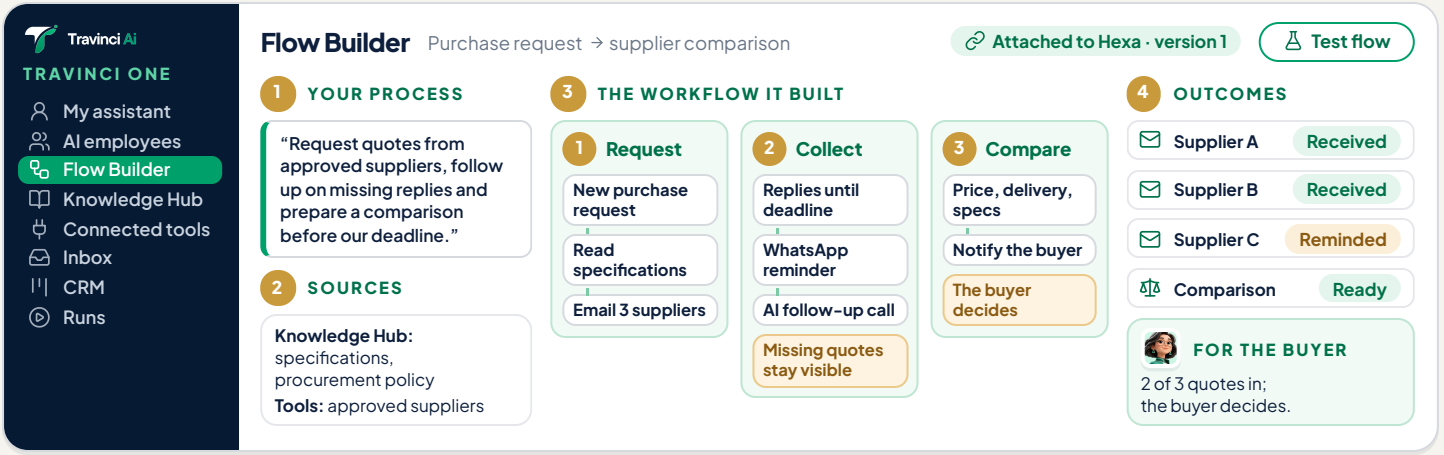
- The buyer reviews the comparison and decides
- No purchase is placed by the AI

WHO BUILDS FLOWS Owners · Operations heads · Team leads

03 AI FLOW BUILDER · IN THE APP

Review it. Customise it. Attach it.

Screens show example data



1 Describe the process
In plain language, like briefing a new teammate. No coding.

2 AI builds the workflow
Steps, checks, channels and handovers, set up from what the Knowledge Hub knows.

3 Review and customise
Change any step, add a person where you want one, and test the flow before it goes live.

4 Attach to an AI employee
Attach it to Hexa, or to several AI employees. Every run is tracked, step by step.

IN DETAIL · FOR TECHNICAL TEAMS

Built-in know-how
The Knowledge Hub already knows Travinci One's own features and connections.

Every channel in one flow
Email, WhatsApp, AI calls and app notifications.

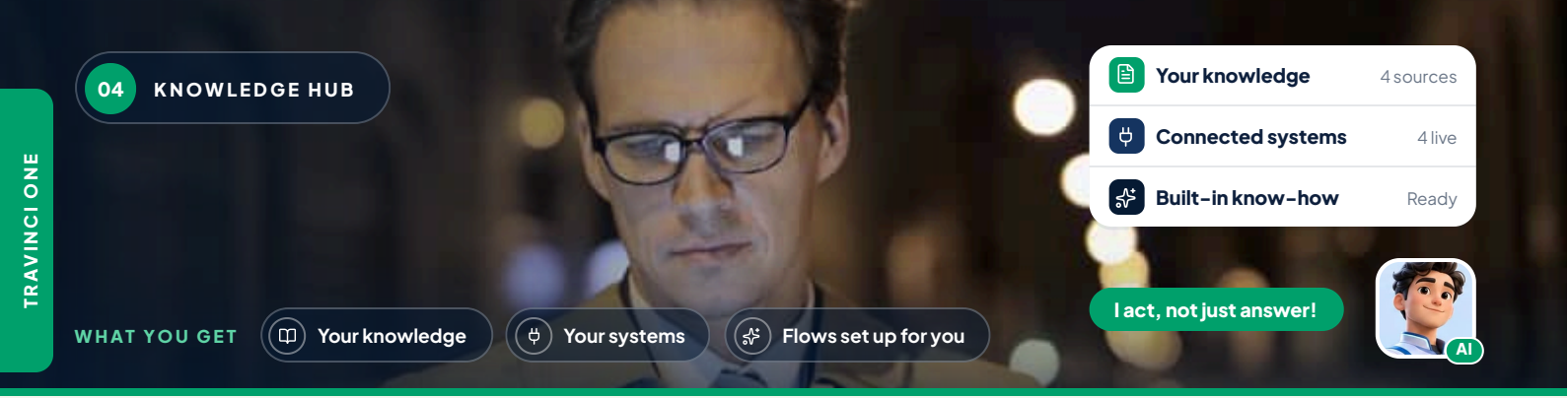
People where it matters
Steps you choose hand over to a person, with the context.

Published means fixed
A published version never changes; running work keeps its version.

Triggers of every kind
A message, an event or a schedule starts the flow.

Every run tracked
Each run is followed step by step in Runs, with its outcome.

04 KNOWLEDGE HUB



WHAT YOU GET · Your knowledge · Your systems · Flows set up for you

Tell the AI. It sets up the rest.

The problem: every new process means connecting systems and explaining your business again, and that used to need developers.
The fix: the Knowledge Hub links your knowledge, your systems and Travinci One's built-in know-how. Tell the AI the job: it sets up the flow and takes action, not just answers, in any industry.

WHAT'S INSIDE

Your knowledge
Files, website pages and social profiles, in versioned knowledge bases.

Your systems
CRM, calendar, booking tools and your own API, synced on your schedule.

Built-in know-how
The system's own features and connections, already known.

A knowledge graph
Facts, systems and features linked, so the AI knows what connects to what.

Every channel in
Email, WhatsApp, AI calls, web chat and app notifications.

Any industry
Not built for one trade: any flow, for any business.

FOR ANY BUSINESS Owners · Operations heads · IT teams

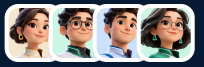
BEHIND ONE SENTENCE

You say
"Help applicants finish their applications."

The hub knows
Courses, fees, requirements and the application portal.

The AI sets up
The flow: its steps, channels and handovers.

You review
Change any step, test it and switch it on.



AI EMPLOYEES HERE

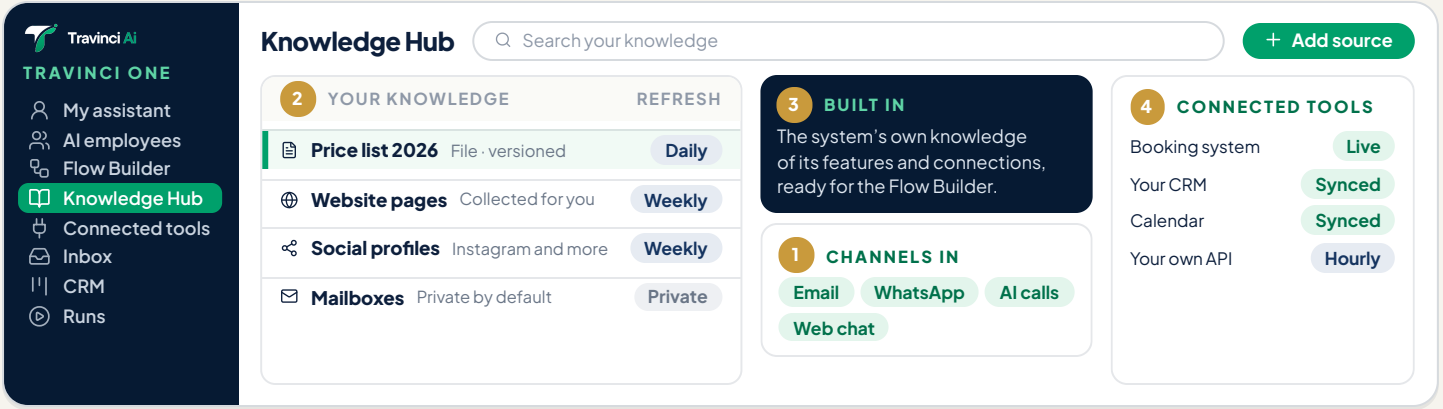
Every AI employee

ON THEIR OWN
- Answers from your approved knowledge
- Acts on your systems through the hub

WAITS FOR A PERSON
- Mailboxes stay private by default
- When knowledge is missing, a person answers

Four foundations. One hub.

Screens show example data



1 Connected channels
Email, WhatsApp, AI calls, web chat and app notifications bring every request in.

2 Your knowledge
Files, website pages, social profiles and systems, in versioned knowledge bases.

3 Built-in know-how
The Knowledge Hub already knows the system's own features, so the AI can set up the remaining flows.

4 Connected tools
Records, calendars, listings and your CRM, connected through the Knowledge Hub.

IN DETAIL · FOR TECHNICAL TEAMS

Smart retrieval
Semantic and hybrid search, with conversation recall.

Document library
Upload, sort and manage every file in one place.

Website and social
Website pages collected; Instagram, Facebook, LinkedIn, YouTube, TikTok and X profiles too.

Systems on a schedule
APIs and CRMs sync on your schedule, with a live lookup while answering.

Private mailboxes
Mailboxes stay private by default; email memory stays linked to its source.

Safe live updates
Running conversations keep the version they started with.

Published means fixed
A published version can never change.

Agent API
Per-agent keys let your own apps call your agents.

EXAMPLE · ADMISSIONS

From enquiry to full application.

Sara Thomas, an applicant, asks Northfield College about a business course. Its Admissions Assistant, an AI employee the college created, takes her to a complete application.



Travinci AI

TRAVINCI ONE

- My assistant
- AI employees
- Flow Builder
- Knowledge Hub
- Connected tools
- Inbox
- CRM
- Runs

Admissions Assistant

AI employee

Attached · version 1

1 YOUR INSTRUCTION

"Help applicants choose a course, collect the required documents and send complete applications to our admissions team."

2 SOURCES

Knowledge Hub: courses, fees, requirements

Systems: application portal, document status

3 THE FLOW IT BUILT

1 Guide

- New course enquiry
- Course and intake
- Prospectus, checklist
- Eligibility → team

2 Collect

- Documents complete?
- AI call: what is missing
- Sara uploads

3 Hand over

- Admissions review
- Adviser notified
- The team decides

4 OUTCOMES

Course	Chosen
Checklist	Sent
Documents	Complete
Decision	Team review

ON THE CALL

Assistant: Your transcript is still missing.
Sara: I will upload it tonight.

1 Your instruction
Written once, in plain words.

2 Sources
Course facts in the Knowledge Hub; the portal connected.

3 The flow
Guide, collect, hand over. Gold steps go to the team.

4 Outcomes
Every applicant's status, step by step.

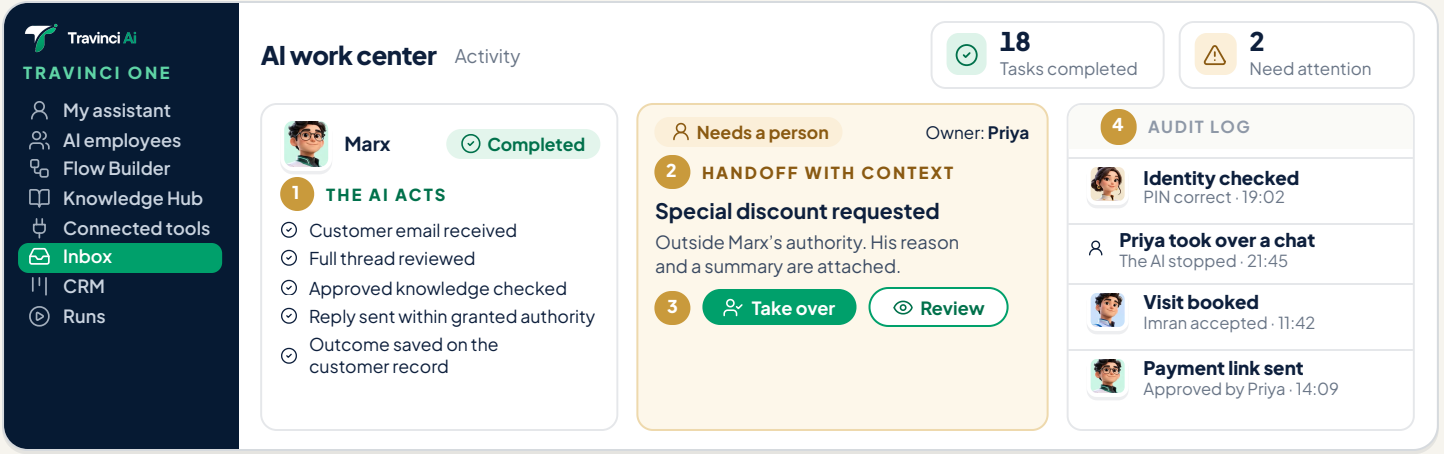
RUNS ON: Email · WhatsApp · AI calls · App · review

People decide: the admissions team answers eligibility questions and makes the final decision. Example data.

05 YOU STAY IN CONTROL · IN THE APP

AI does the work. People decide.

Screens show example data



1 The AI acts
Within its permissions, on every channel, day and night.

2 Handoff with context
When it needs a person, it hands over its reason and a summary of what it knew and did.

3 Take over in one click
The AI stops at once, and any reply it had queued is cancelled.

4 Every action recorded
A full audit log of every action, whether an agent or a person took it.

IN DETAIL · FOR TECHNICAL TEAMS

Approvals desk
Decide every action an agent asked permission for.

Clear roles
Owner, Admin, Member or Viewer; invitations expire after 7 days.

One inbox
Every channel, filtered by owner, queue and state.

Data and privacy
Retention, export, deletion requests and a full audit log.

Internal notes
Notes beside the transcript that the customer never sees.

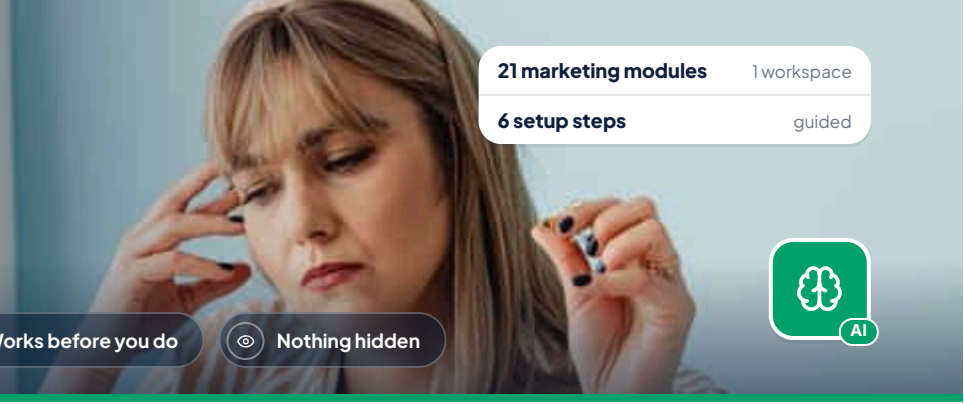
Your providers or ours
Bring your own OpenAI, ElevenLabs or Exotel accounts.

Your own workspace
Isolated at the database level; your data never crosses over.

Developer platform
REST API, tokens, per-agent keys and documentation.

Marketing BOS

WHY IT EXISTS



21 marketing modules	1 workspace
6 setup steps	guided

WHAT YOU GET · One marketing brain · Works before you do · Nothing hidden

AI

Marketing runs on too many tabs. We closed them.

The problem: a normal week jumps between six tools, and every jump loses your brand voice and last week's ideas. **The fix:** one workspace learns your business once, watches your market daily and carries it into every brief, image, video and post.

WHY TEAMS CHOOSE IT

Knows your business
Website, socials and Google Business read once, reviewed by you, used everywhere.

Works before you do
Trends, competitors and reports collected on a schedule.

A team of AI agents
One agent or a team that drafts, reviews and debates.

Nothing hidden
Paid AI actions show their price first; every score shows its source.

Made for agencies too
Many client brands from one login, with white-label reviews.

Pay only when it works
A failed AI action releases its credits.

THE LOOP

1. **1 · Brand** — Define your company and voice.
2. **2 · Discover** — Trends and rivals, daily.
3. **3 · Create** — Briefs, images and full videos.
4. **4 · Publish** — Every platform, one composer.
5. **5 · Improve** — Results make the next round smarter.

AI HERE
Marketing Brain
Your AI marketing team

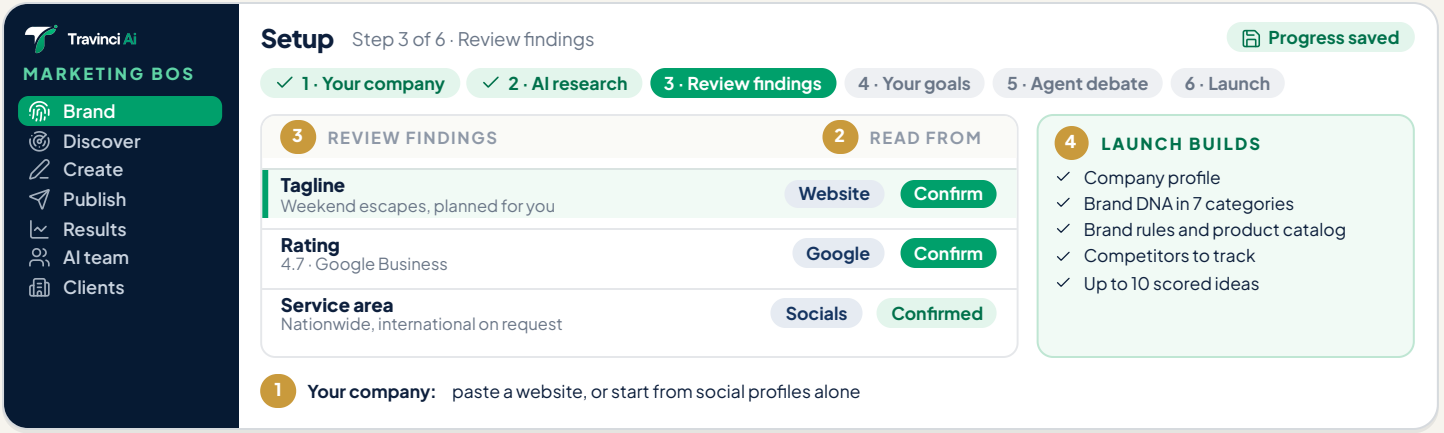
DOES ON ITS OWN
- Reads your website and socials once, for you to review
- Watches trends and rivals on your schedule

WAITS FOR A PERSON
- Nothing is kept as a fact until you confirm it
- Nothing is published until you confirm

WHO USES IT Marketing teams · Founders · Agencies

Paste your website. Meet your brain.

Screens show example data



1 Paste your website

Or your social profiles. Autofill suggests what the business offers.

2 The AI researches

Your website, Google Business listing and social profiles are read.

3 You review

Check and correct what was found. Nothing is kept as a fact until you confirm it.

4 Goals, debate, launch

Set your goals; four agents debate your approach; one click goes live.

IN DETAIL · FOR TECHNICAL TEAMS

Progress saved as you go
Safe to refresh in the middle of a build.

Your goals
The part AI cannot research: what you want marketing to achieve.

Each AI step priced first
You see the cost before it runs.

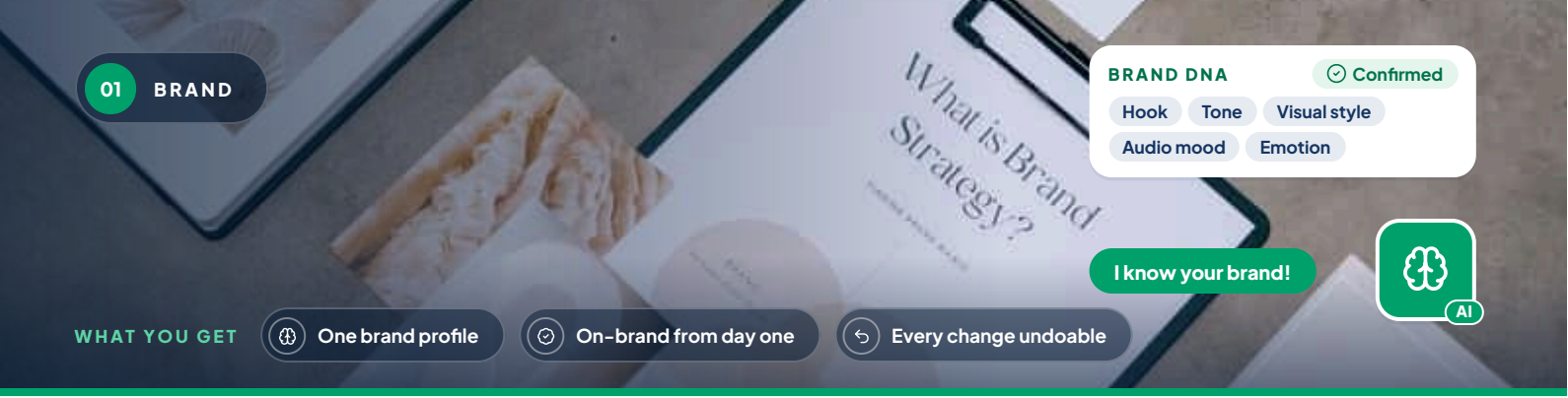
Agent debate
Scout, Analyst, Strategist and Brand Guardian weigh opportunities and risks.

No website? Socials work
Setup can start from your social profiles alone.

Ideas at launch
Up to 10 scored content ideas are ready on day one.

Built once
Launch builds once, however many times it is clicked.

You decide what is true
Nothing the AI finds is kept as a fact until a person confirms it.



MARKETING BOS

Teach it your brand once. It remembers everywhere.

The problem: your brand lives in people's heads and old files, so every writer and every tool sounds a little different. **The fix:** your facts, products, voice, rules and logo live in one profile, and every brief and caption is written from it.

WHAT'S INSIDE

Company profile
Facts from your website, socials and Google Business, each showing its source.

Brand DNA
Hook, tone, format, visual style, audio mood, call to action and emotion.

Brand rules
Rules that are really checked, with a report of where each one applies.

Product catalog
Real prices, "price not set" and "custom quote" kept apart.

Logo Studio
An AI logo in your brand colours, or your own, previewed light, dark and small.

Documents and FAQs
Facts and examples; only approved items reach the AI (add-on).

A DAY WITH IT

Mon
Your website is re-read. Three updates wait for review.

Tue
You approve two and reject one.

After
Every new brief and caption uses the new facts.

AI HERE

Marketing Brain

Your AI marketing team

DOES ON ITS OWN

- Reads your public presence and suggests what you offer
- Checks every sentence it writes against your saved facts

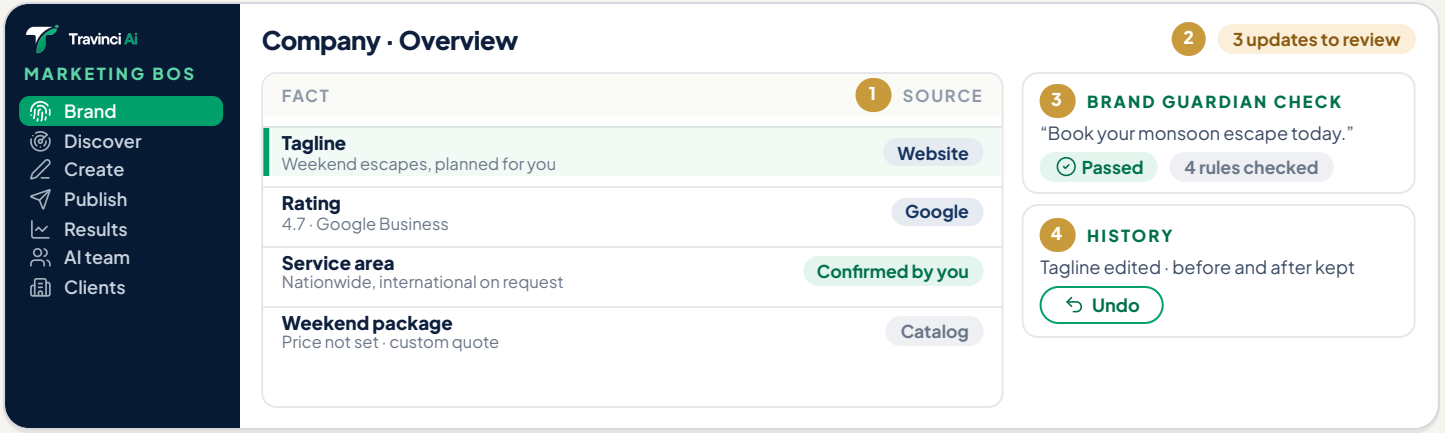
WAITS FOR A PERSON

- New findings change nothing until a person approves
- Only approved documents reach the AI

WHO USES IT Marketing team · Brand managers · Founders

How your brand profile works.

Screens show example data



1 Read once

Your website, social profiles and Google Business listing are read, and each fact keeps its source.

2 You confirm

New findings wait in "Review updates" and change nothing until a person approves them.

3 Used everywhere

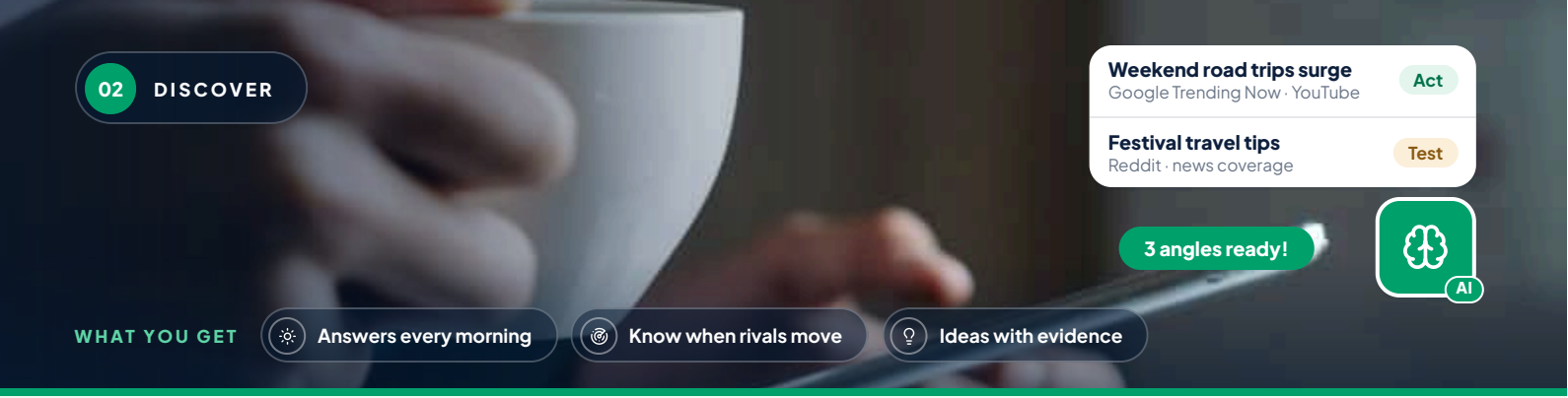
Every brief, image, video and caption is written from the profile. Unsupported sentences are removed.

4 Every change undoable

Each edit keeps an exact before and after, and one click puts it back.

IN DETAIL · FOR TECHNICAL TEAMS

- **Brand Guardian check** — Paste any text: Passed, Flagged or Not checked.
- **Rule coverage** — See exactly where each brand rule is enforced.
- **Charged only when read** — Re-reads cost only when the site was read.
- **Logo previews** — Light, dark and small sizes before you choose.
- **Edits never collide** — Two people editing never overwrite each other.
- **Safe undo** — Payments and published posts are never "undone".
- **Unsaved edits kept** — Edits survive switching between tabs.
- **Brand colours everywhere** — Logo Studio and captions use your Brand DNA colours.



MARKETING BOS

Your market, read before breakfast.

The problem: trends and rival moves are found too late, scattered across tabs, and guesses are presented as numbers. **The fix:** trends, rivals and product ideas are collected on your schedule, with evidence, and unknown is never shown as zero.

WHAT'S INSIDE

Intelligence Hub
One screen with your content pipeline and the next best step.

Daily Trends
The public conversation in your markets, ranked for your business.

Competitor Intelligence
Rival websites and six social channels, with what changed.

Recommended Posts
Ideas scored on eight dimensions, each score explained.

Market Position
Your publishing against the competitors you track.

Product Intelligence
An AI CMO that suggests what to sell next.

A DAY WITH IT

07:00
Trends and competitor sites are collected on your schedule.

08:30
"Weekend road trips surge" is ranked Act; you get three on-brand angles.

09:00
A rival cut a package price. You see the before and after.

AI HERE
Marketing Brain
Your AI marketing team

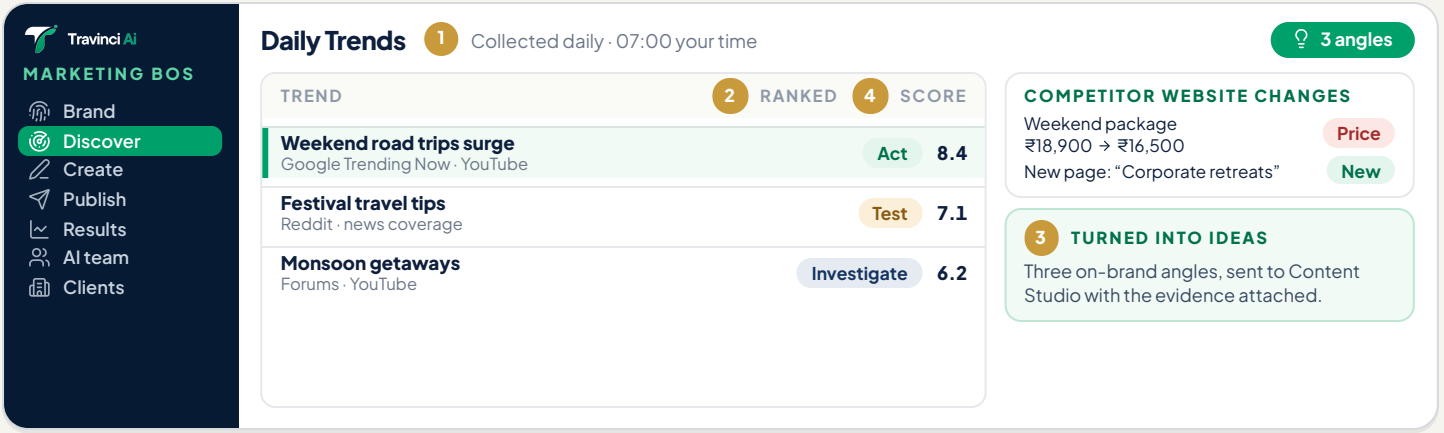
DOES ON ITS OWN
- Ranks trends for your business and writes angles
- Reads competitor changes and suggests new offers

WAITS FOR A PERSON
- Every AI reading is labelled as AI, apart from facts
- It never sets a price: product ideas stay yours

WHO USES IT Marketing heads · Content teams · Founders

How discovery works.

Screens show example data



1 Collected on your schedule

Daily or weekly at your local time: Google Trending Now, YouTube, Reddit, news, forums and rivals' sites and socials.

2 Ranked for your business

Each trend is marked Act, Test, Investigate or Watch, labelled as a judgement, not a probability.

3 Turned into ideas

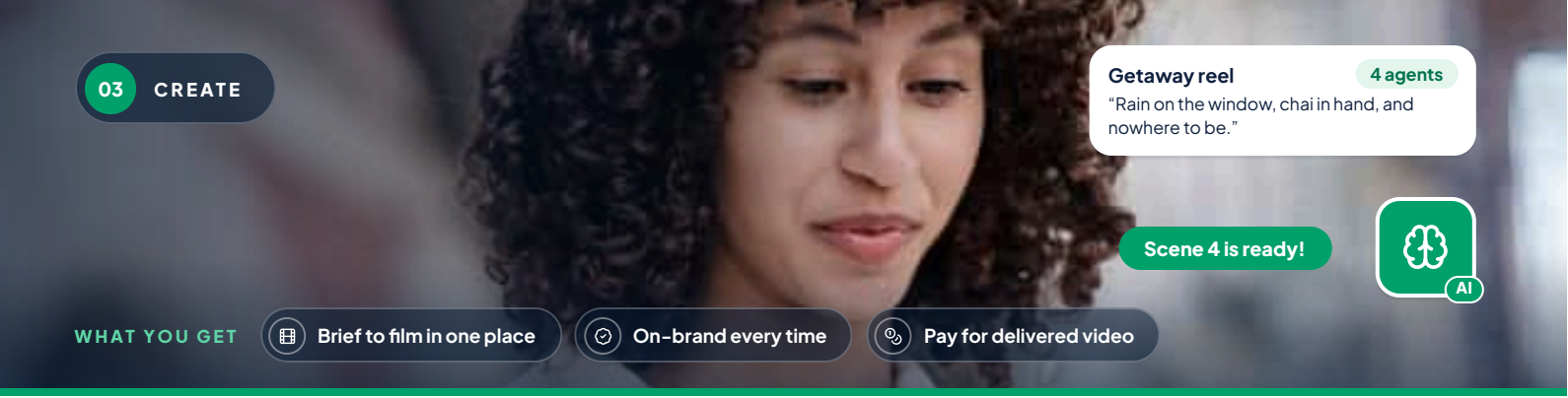
One click turns a trend or a rival's change into on-brand angles, sent to Content Studio with the evidence.

4 Every idea scored

On eight dimensions: momentum, brand fit, viral potential, feasibility, leads, freshness, gap and resonance.

IN DETAIL · FOR TECHNICAL TEAMS

- **Evidence on every card** — Published date, measured date and source links.
- **Honest scores** — Evidence-backed, partial, AI estimate, historical or not analysed.
- **Seen vs. interpreted** — What was observed, your facts and the AI's reading are kept apart.
- **Honest numbers** — "Observed post share", never a claimed market share.
- **Checked before you see it** — Angles with unbacked prices or promises are dropped.
- **Product ideas, judged three ways** — Fit, evidence and readiness; AI never sets the price.



MARKETING BOS

From idea to finished film. One studio.

The problem: a single reel means a writer, a designer, a voice artist, a video editor and a week of back-and-forth. **The fix:** a team of AI agents writes the brief in your voice; then images, voice, music and every scene are made and edited here.

WHAT'S INSIDE

Content Studio
Hook, script, story beats, shot plan, caption and hashtags in your voice.

Visual Engine
Campaign images, moodboards, storyboard frames and caption overlays.

Characters
Cast one face and lock it as the reference for every scene.

Build a full video
Your brief planned and filmed scene by scene.

Video Studio
Trim, captions, music, templates and Full HD export in the browser.

Asset Library
Every image, clip and video, linked to the brief it came from.

A DAY WITH IT

10:00
One idea in: a four-agent team writes the reel brief in your voice.

10:20
Images, voiceover and four video scenes are made from it.

11:00
Captions and your logo are added; the reel exports in 1080p.

AI HERE
Marketing Brain
Your AI marketing team

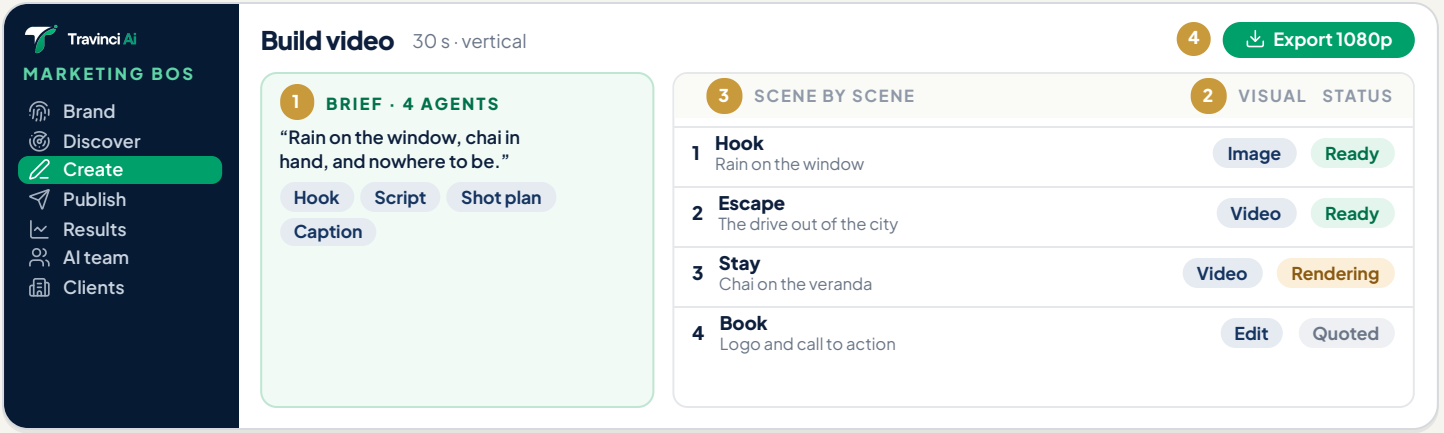
DOES ON ITS OWN
- Writes briefs and prompts in your brand voice
- Makes images, voiceovers, music and every scene

WAITS FOR A PERSON
- You see and edit every prompt first
- You approve the price before each scene is made

WHO USES IT Content creators · Social media teams · Agencies

How creating works.

Screens show example data



1 A brief from a team

1, 2 or 4 agents write it in your voice, in 13 formats and 12 languages.

2 Visuals that fit

Each purpose sets its own shape. You see and edit the prompt first; voice and music follow your story.

3 Filmed scene by scene

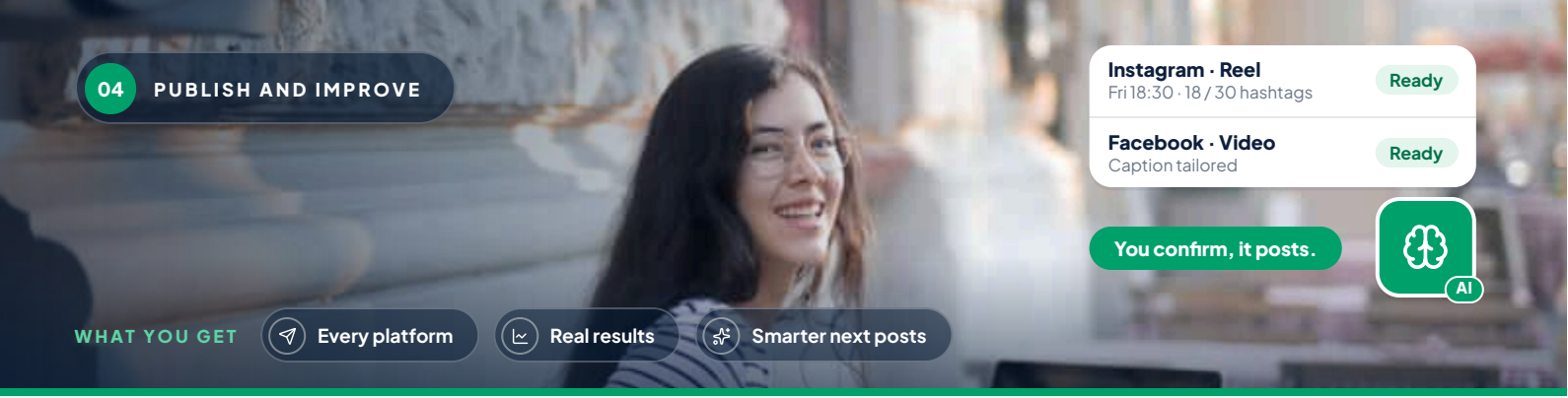
The video plan suggests length, scenes and engine. Each scene is quoted first and paid only when delivered.

4 Edit and export

Captions from the real audio in 42 languages, templates, your logo, and export in 720p or 1080p.

IN DETAIL · FOR TECHNICAL TEAMS

- **Claim check built in** — Unsupported prices, numbers and promises are removed.
- **Every version kept** — Compare, restore or undo briefs, images and plans.
- **Change the length safely** — 15, 30, 45 or 60 s, with new timings and price shown first.
- **Buyer Lens (add-on)** — Watches your ad like a customer and proposes missing shots.
- **Close the tab, it keeps going** — Renders continue on the server.
- **Leading engines** — Gemini and OpenAI images; Seedance, Kling, Veo, Luma, Runway video; ElevenLabs voice.



Publish everywhere. Learn from every result.

The problem: every platform has its own limits and tools, and results come back too late to change the next post. **The fix:** one composer fits each post to every platform and schedules it; real results flow back and make the next post smarter.

WHAT'S INSIDE

Every platform's rules
Facebook and Instagram post automatically; 6 more get drafts.

Meta ads, paused first
Five objectives; turning an ad on needs your budget OK.

Reliable scheduling
Retries, a clear time zone, a calendar; never posted twice.

Performance
Reach, engagement and leads, read from Meta every six hours.

AI Insights
What changed and what to do, marked data or AI inference.

Daily Reports
A morning brief on your schedule; no news means no AI call.

A DAY WITH IT

Fri 18:30
The reel goes out on Instagram and Facebook, each caption tailored.

+6 h
Reach, engagement and leads are read back from Meta.

Next day
AI Insights say what changed and what to try next.

AI HERE
Marketing Brain
Your AI marketing team

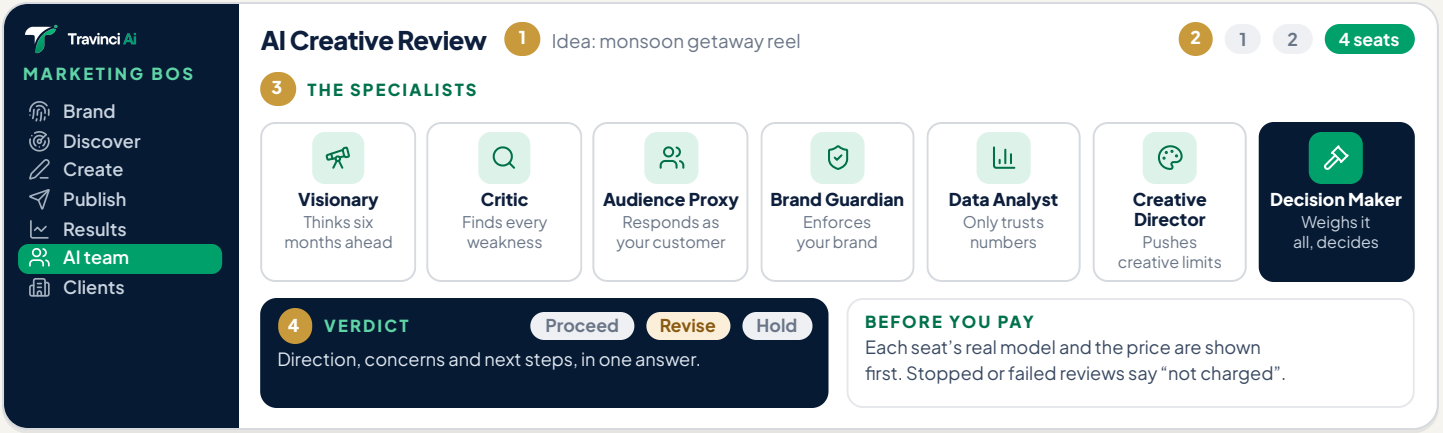
DOES ON ITS OWN
- Fits each post to every platform's rules
- Explains what changed, marked data or AI inference

WAITS FOR A PERSON
- Nothing is published until you confirm
- Switching an ad on asks you to confirm its budget

WHO USES IT Social teams · Performance marketers · Agencies

Seven specialists. One decision.

Screens show example data



1 Pick an idea
Choose the idea or the content to review, from anywhere in the workspace.

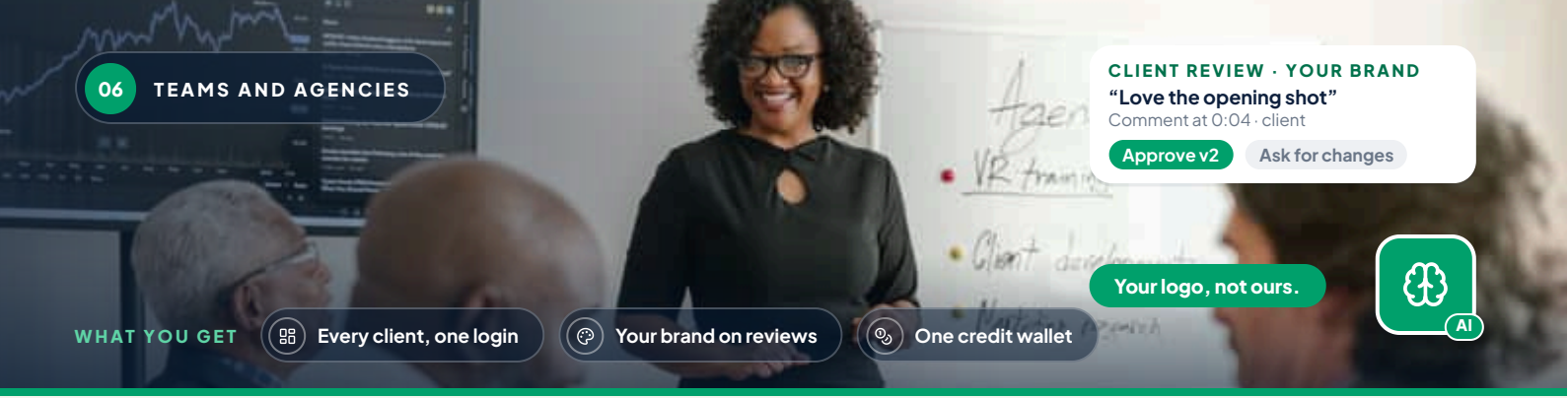
2 Pick a team size
1, 2 or 4 seats per task. See each seat's real model and the price before you pay.

3 The team reviews
Each specialist looks from its own angle: brand, audience, data, creativity and risk.

4 One clear verdict
Proceed, Revise or Hold, with the direction, concerns and next steps.

IN DETAIL · FOR TECHNICAL TEAMS

- **Briefs** — Content Studio, with 1, 2 or 4 agents.
- **Prompts** — A prompt team in the Visual Engine.
- **Strategy** — The agent debate during setup.
- **Decisions** — AI Creative Review before you spend on production.
- **Stop any time** — Stopped or failed reviews say "not charged".
- **Inputs checked first** — Warnings when data is missing or out of date, before the review runs.
- **Honest when partial** — If an agent didn't answer, the review says which one. Nothing is invented.
- **AI Assistant** — A chat that knows your company, logo, colours and Brand DNA, and sends answers to Content Studio.



WHAT YOU GET · Every client, one login · Your brand on reviews · One credit wallet

Many brands. One login. Your logo on reviews.

The problem: agencies juggle a login, a tool bill and a review thread per client, and clients see someone else's brand. **The fix:** run every client from one subscription and credit wallet, and send reviews from a portal with your own brand.

WHAT'S INSIDE

Agency Hub
Every client company at a glance; switch in one click.

Credits, shared or set
One wallet for all, or a set amount per company.

White-label review
Your name, logo, colours and domain; comments at an exact second of video.

Tools per company
Switch individual tools on or off for each client.

Roles and access
Admin, member or viewer, with an access preview.

Approval re-checked
Before publishing, the approved version is re-checked. Nothing is auto-approved.

A DAY WITH IT

Mon
You add Sunrise Travel as a client company.

Tue
Its team gets only the tools you switch on.

Fri
The client comments at 0:04 and approves version 2 in your portal.

AI HERE
Marketing Brain
Your AI marketing team

DOES ON ITS OWN
- Works from each client's own brand profile
- Re-checks the approved version before publishing

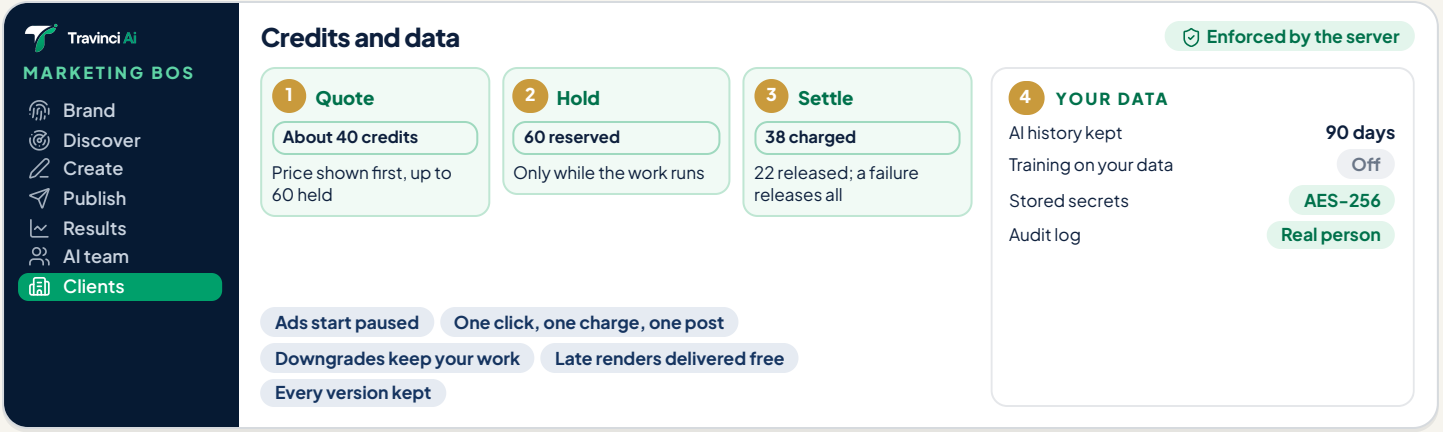
WAITS FOR A PERSON
- Nothing is auto-approved: the client decides
- Reviews use no AI and no credits

WHO USES IT Agencies · Multi-brand teams · Their clients

07 TRUST · IN THE APP

Show the price. Never fake a zero.

Screens show example data



1 The price, before the button
Every paid AI action shows its price first.

2 Fail, and you don't pay
A failed AI action releases its credits.

3 Unknown is a word
A metric that was never recorded says "not recorded", never zero.

4 Inference is labelled
AI inference is always marked as inference, apart from the data.

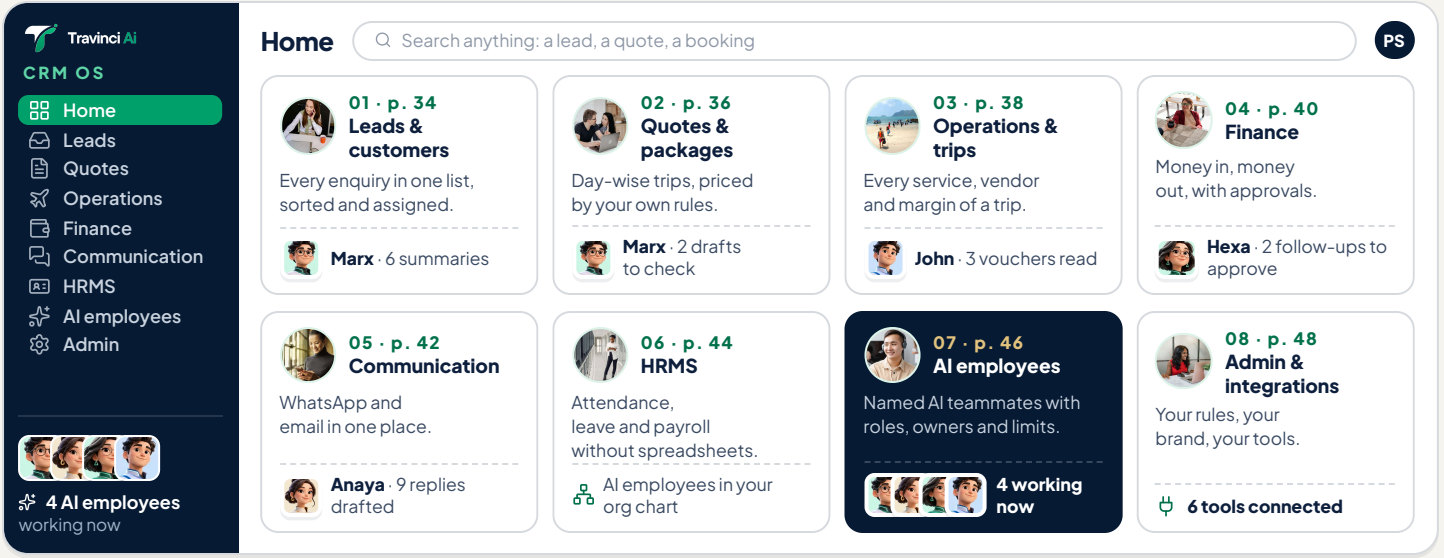
IN DETAIL · FOR TECHNICAL TEAMS

- **Walled-off companies** — Each company's data is kept apart, set by the signed-in session.
- **Encrypted, write-only secrets** — AES-256 for stored credentials; keys are never shown again.
- **Your AI data, your choice** — Training is off unless you turn it on; delete AI history any time.
- **Retention you set** — Keep AI history from 7 to 3,650 days, set by the account owner.
- **Safe fetching** — Links you add are blocked from private networks and cloud metadata addresses.
- **Learning you approve** — It adjusts recommendation weights per workspace (no model training); an admin approves.
- **Prices approved in advance** — Analyses that update while you sleep use prices you approved.
- **Under the hood** — OpenAI, Claude, Gemini, Groq, Mistral, Cohere and our own models, with up to four fallbacks.

Travinci CRM OS

Everything your business runs on. In one system.

Eight connected areas share one customer record, one team and one set of rules. Start with the module you need today and add the rest when you grow.



8	40+	2,500+	5
connected areas	automatic background jobs	system actions (APIs)	AI engines to choose from

AI employees work inside every module

They read, draft, remind, call and sum up. No AI employee can move money.

OpenAI · Anthropic Claude · Google Gemini · DeepSeek · Travinci LLM

Four lines. One network. Nothing typed twice.

Sales, money, trips and people each run on their own line. Where two lines meet, one module hands its work to the next by itself: a payment starts the trip and updates what is owed, and your team structure decides who gets each lead. After the trip, if you switch it on, reviews and complaints are routed for you.



Line 1 · Sales
Leads, quotes · p. 34–37

Line 2 · Money
Finance · p. 40–41

Line 3 · Trip
Operations · p. 38–39

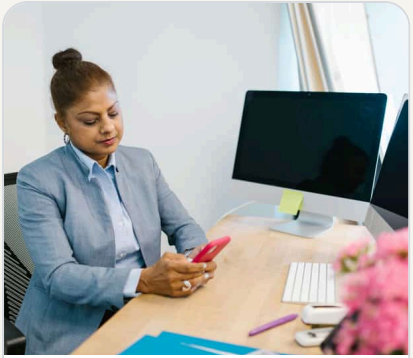
Line 4 · People
HRMS · p. 44–45

Left pages: what each module is, and its AI employee. **Right pages:** how it works in the app.

CRM OS

Meet your AI team. Priya stays in charge.

AI employees come built into CRM OS and work next to your staff, each with a name, a job and limits, just like hiring. They do the busywork inside the modules; no AI employee can move money, and risky AI actions wait for a person.



A PERSON · IN CHARGE

Priya

Sales Manager

- Approves money and anything risky, in one tap
- Sees every AI action in the log
- New AI employees only propose at first



Marx

Sales Executive

Leads · Quotes
p. 34–37

- Writes a one-look summary and the next step on every lead
- Drafts day-wise quotes for your team to check
- **Asks before he calls a customer about a quote**



Anaya

Personal Assistant

Communication
p. 42–43

- Can answer your calls, recognise callers and open a lead
- Reads every email and drafts the reply
- **Transfers the call to a person in business hours**



Hexa

Finance Assistant

Finance
p. 40–41

- Follows up payment links by phone, once a person approves
- Reads the numbers, so she can answer questions
- **Can never move money: a person approves every payout**



John

Service Coordinator

Operations & trips
p. 38–39

- Reads supplier vouchers into the booking
- Reads e-tickets too, for a person to confirm
- **A person confirms what he read from a voucher**

Every AI employee ✓ Has a name, a job and limits ✓ Can only read on calls ✓ Never says an unchecked price ✓ Keeps quiet hours and do-not-call lists ✓ Logs every action

AI IN EVERY STEP

AI does the busywork. Your team makes the calls.

From the first enquiry to the last review, an AI employee helps at each step. No AI employee can move money.

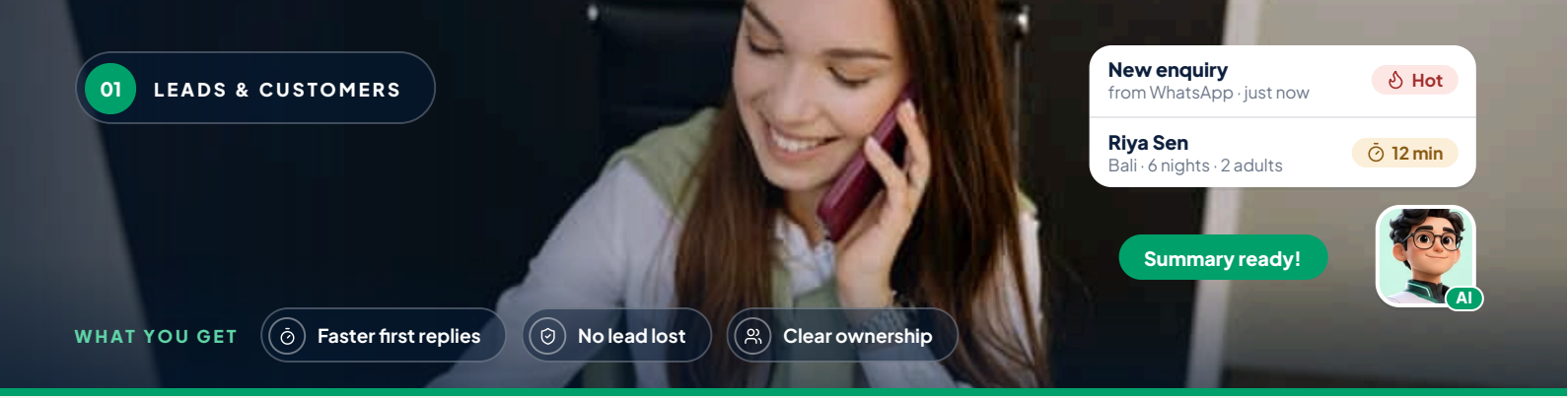
YOUR TEAM

1	2	3	4	5	6	7
An enquiry arrives WhatsApp, ads, website, phone, walk-in	**The lead is assigned** Sorted hot, warm or cold	**The customer is contacted** Calls, WhatsApp, email	**A quote is built** Day-wise, priced by your rules	**The trip is booked and run** Services, vendors, documents	**The customer pays** Card, UPI, pay links	**Feedback comes in** Reviews and complaints

AI NEXT TO THEM

1	2	3	4	5	6	7
Anaya Answers the call and opens the lead p. 46	**Marx** Writes a one-look summary and the next best step p. 34	**Marx** The voice bot calls, records and sums up the call p. 34	**Marx** Drafts the full quote; your team checks and sends p. 36	**John** Reads supplier vouchers and drafts vendor emails p. 38	**A person** **Only a person approves money. AI never pays.** p. 40	**John** Sums up guest feedback for managers p. 38

AI employees work between every step: callbacks, follow-ups, payment reminders and scheduled tasks, by playbooks you set. Some AI features are switched on per company.



Every enquiry in one list. No lead goes cold.

The problem: enquiries arrive on WhatsApp, ads, your website and the phone, and the ones nobody answers in time go cold. **The fix:** every enquiry lands in one list, is sorted hot, warm or cold, and goes to the right person; switch on a reply clock to time the first answer.

CRM OS

WHAT'S INSIDE

Lead capture
Meta and Google ads, WhatsApp, website, calls, walk-ins and Excel import.

Customer profiles
Found or created for every lead; active and inactive customers.

Lead lifecycle
Calls, quotes, payments, bookings, tasks and journey file on one record.

Assignment
Shared out to your team, with every handover logged.

Smart segregation
Hot, warm and cold, with a priority score that explains itself.

Voice bot
AI calls that are recorded and summed up on the lead.

A DAY WITH IT

10:02
Riya asks about Bali on WhatsApp. A lead is made with her number.

10:03
It is marked hot and given to Priya. Her reply clock starts.

10:09
Priya calls. Marx's summary tells her what Riya wants.



AI EMPLOYEE HERE

Marx

Sales Executive
Reports to Priya

DOES ON HIS OWN

- A one-look summary and the next best step on every lead
- Asks a person before he calls a customer

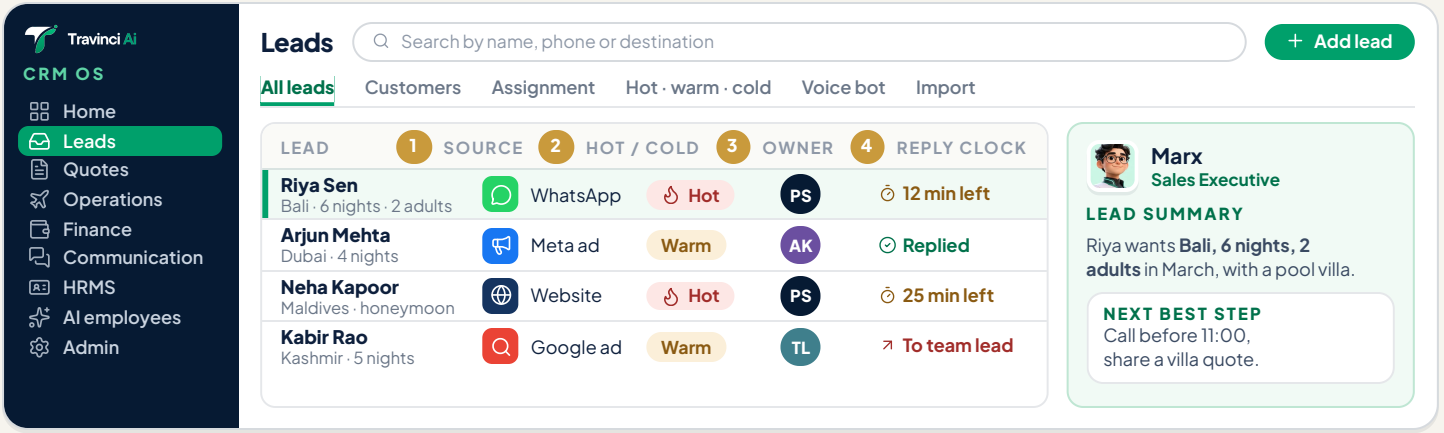
WAITS FOR A PERSON

- Discounts, payments and bookings: on a call he can only read
- Any price or availability that is not yet checked

WHO USES IT Sales team · Team leads · Managers · Owners

How leads work.

Screens show example data



1 Comes in from anywhere

Ads, WhatsApp, your website, calls and walk-ins land in one list. A returning customer's profile is found; a new one is made.

2 Sorted hot, warm or cold

Each lead gets a temperature, so your team knows who to call first. Calls, quotes and payments collect on one record.

3 Given to the right person

Leads are shared by your team structure, or by hand. Every handover is logged.

4 A reply clock starts

A time limit for the first reply. If nobody acts in time, the lead moves up to a team lead or manager instead of going cold.

IN DETAIL · FOR TECHNICAL TEAMS

No duplicates
A phone number that matches an open lead is flagged before a second lead is made.

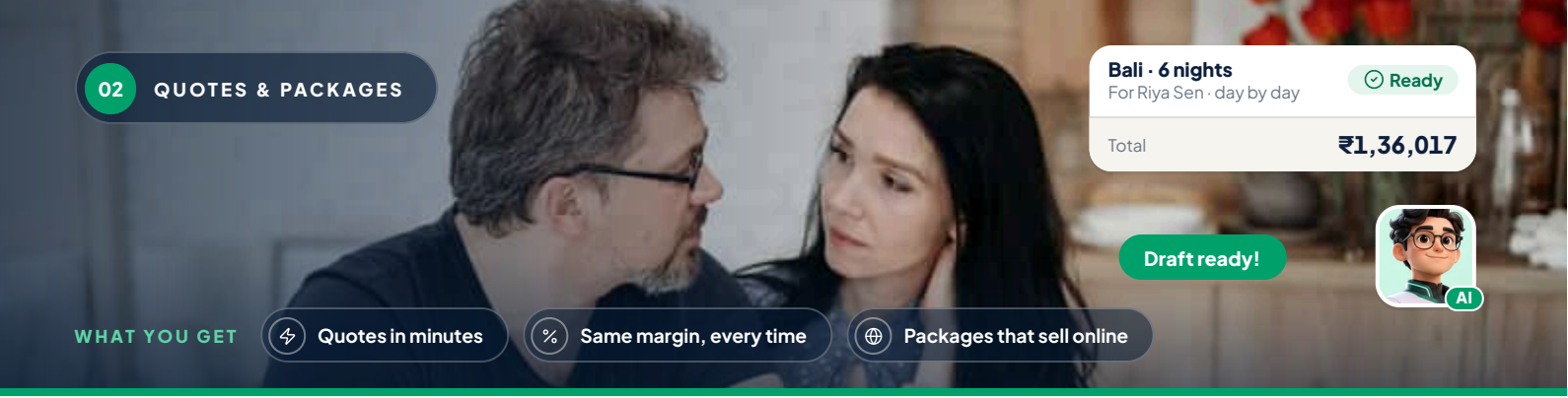
Business hours, if you choose
When the clock is on, it can count business hours only.

Automatic sharing
When switched on, leads go to the people whose intake is on. Overrides need a reason.

Proof, not notes
Notes and edits never stop the clock; which real contacts count is set by your company.

Two clocks, if you want them
When switched on: one to accept the lead, one for the first action, with warnings.

Quote-ready check
The key trip details must be filled in before a quote can be made.



Their dream trip, priced in minutes.

The problem: a full trip quote takes hours of copying prices, and every salesperson adds a different margin. **The fix:** build it day by day from the lead; the price works itself out from your own margin and tax rules, and it goes out in minutes.

CRM OS

WHAT'S INSIDE

Quote builder
Pick the lead, then add hotels, flights, activities and visa.

Day-wise itinerary
Every day planned with stays, transfers and experiences.

Pricing and tax rules
Central markup, GST and TCS set by your company policy.

Quote templates
Branded PDFs and links that look like your company.

Packages
Ready trips with category, type and a day-by-day plan.

Website publishing
Packages go live on your website after a 2-step approval.

A DAY WITH IT

11:00
Marx's draft of Riya's Bali quote is waiting for Priya.

11:06
Priya swaps one hotel; the price updates by itself.

11:10
The quote goes out on WhatsApp. Riya opens it at 11:14.



AI EMPLOYEE HERE

Marx

Sales Executive
Reports to Priya

DOES ON HIS OWN

- Drafts the full day-wise quote from the lead
- Uses real prices and your margin rules

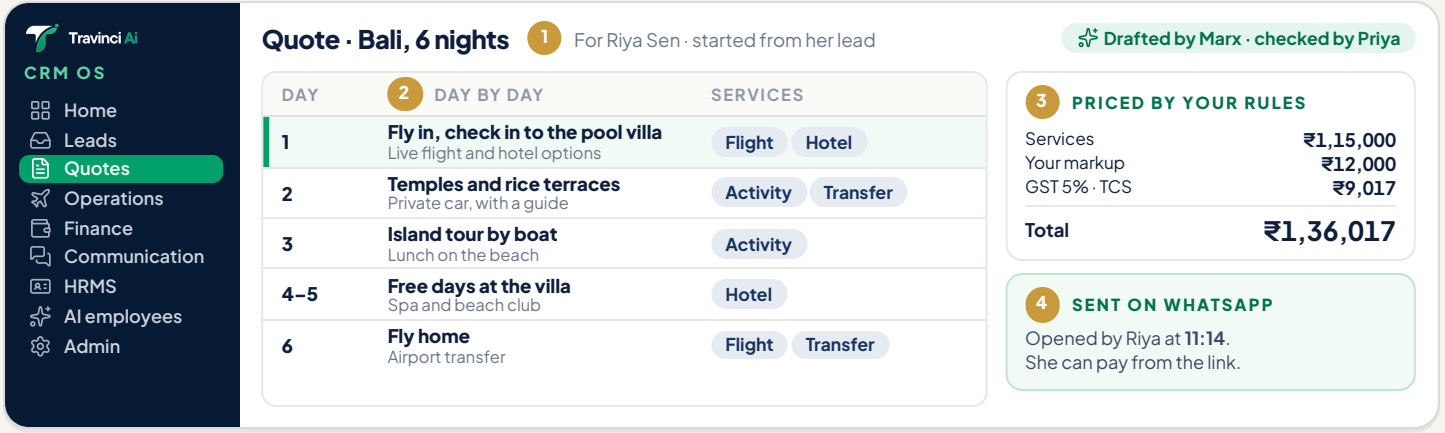
WAITS FOR A PERSON

- Your team checks every quote before it goes out
- Packages go live on your website only after a 2-step approval

WHO USES IT Sales team · Product team · Managers

How quotes work.

Screens show example data



1 Start from the lead

Open the lead and start a quote: dates, travellers and destination are already filled in. Or begin from a package.

2 Build it day by day

Add flights, hotels, activities, transfers and visa to each day. Live flight and hotel options are searched inside.

3 Priced by your rules

Your markup, GST and TCS settings apply by themselves. Ready templates keep every quote looking like your brand.

4 Send it, see it opened

Send by email or WhatsApp and see when the customer opens it. They can pay straight from the link.

IN DETAIL · FOR TECHNICAL TEAMS

Live flights and hotels
Real-time flights and hotels; activities, transfers and visas from your own lists.

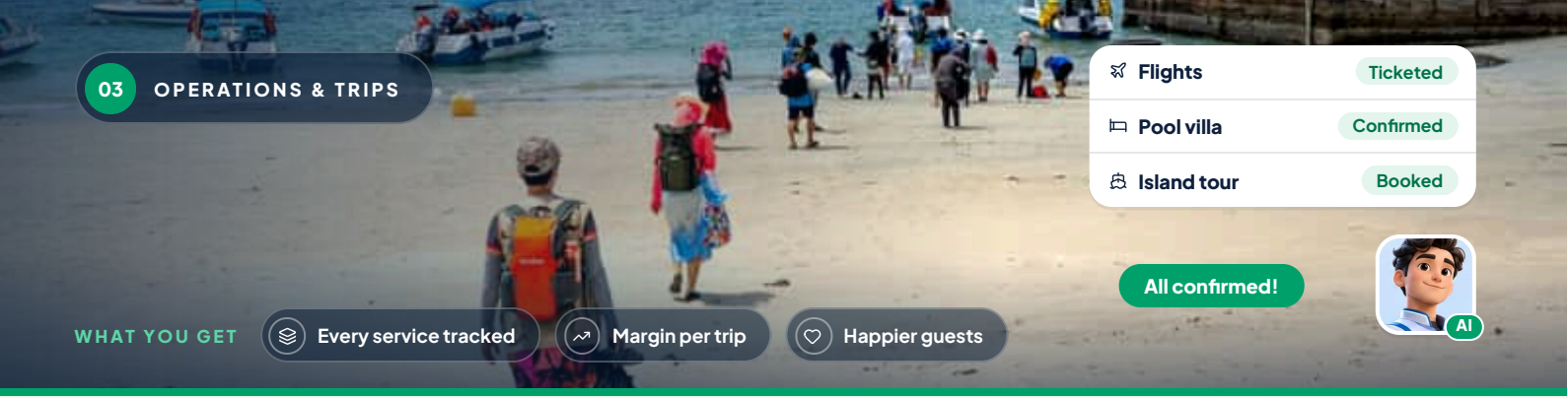
Tax worked out for you
GST and TCS come from your quote settings, worked out for you.

Smart day planner
Keeps each day's pace in budget and never repeats an activity in a day.

Fares rechecked
Prices are checked again before the customer pays.

Cost and price kept apart
Cost and selling price kept apart; markup starts from your company default.

Tracked link + PDF
You see when the quote is opened; payment turns it into a booking.



Every trip looked after.

The problem: once a customer pays, the trip lives in emails and spreadsheets, and a missing voucher or visa is found too late. **The fix:** a paid quote opens the trip with every service listed; vendors, documents and the journey stay on one record.

WHAT'S INSIDE

Services
Flights, hotels, transfers, activities and visa for every trip.

Customer dues
What each customer still owes, and when it is due.

Documents
Passports, visas and ID proofs collected by secure link.

Vendor management
One action emails every vendor about its services, then payments.

Profit per service
The margin on every service and on the whole trip.

Journey file
The full travel record, journey updates and feedback.

ONE TRIP, START TO END

Mon
Riya pays. Her trip opens with flights, hotel, transfers and visa.

Tue
The vendors confirm. Her passport copies arrive by link.

After
With feedback switched on, Riya rates the trip and is asked for a review.



AI EMPLOYEE HERE

John

Service Coordinator
Operations team

DOES ON HIS OWN

- Reads supplier vouchers and e-tickets into the booking
- Reads supplier e-tickets and vouchers for a person to confirm

WAITS FOR A PERSON

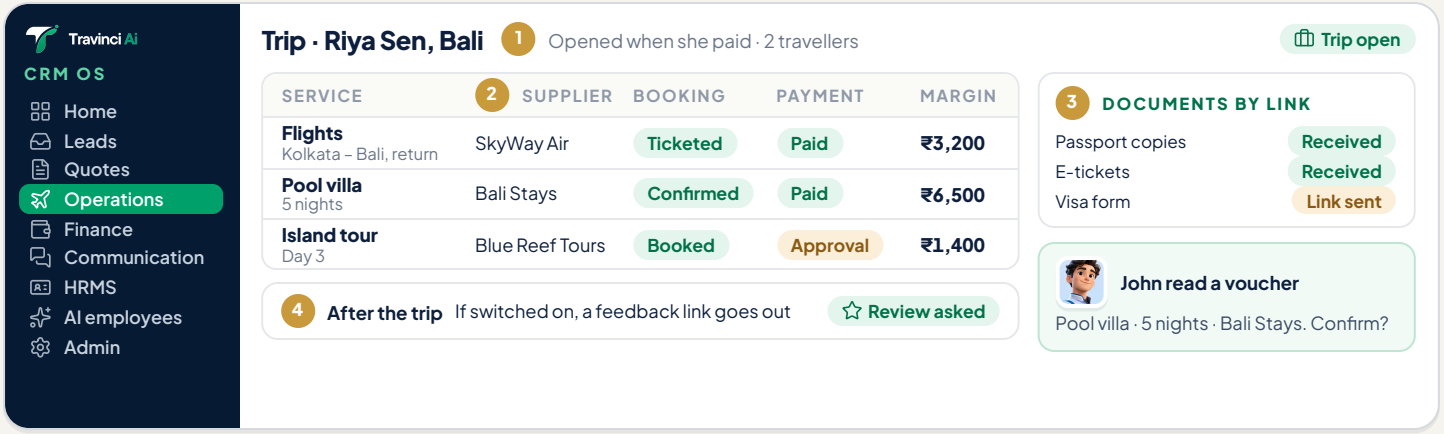
- A person confirms what he read from a voucher
- Vendor payments go to Finance for approval

WHO USES IT Operations team · Finance · Sales team

CRM OS

How trips work.

Screens show example data



1 A paid quote becomes a trip

When the customer pays, a trip opens with every service from the quote and an executive is assigned. Nothing is typed again.

2 One action, every vendor

One action emails each vendor about its own services, and you track each confirmation.

3 Documents collected

Passports, visas and ID proofs are requested by secure link. The journey file keeps the whole trip in one place.

4 After the trip, feedback

Switch on journey automation and a feedback link goes out when the trip ends; a complaint goes to an owner.

IN DETAIL · FOR TECHNICAL TEAMS

Auto-booking
Flights and hotels picked from live inventory book themselves once paid and details are complete.

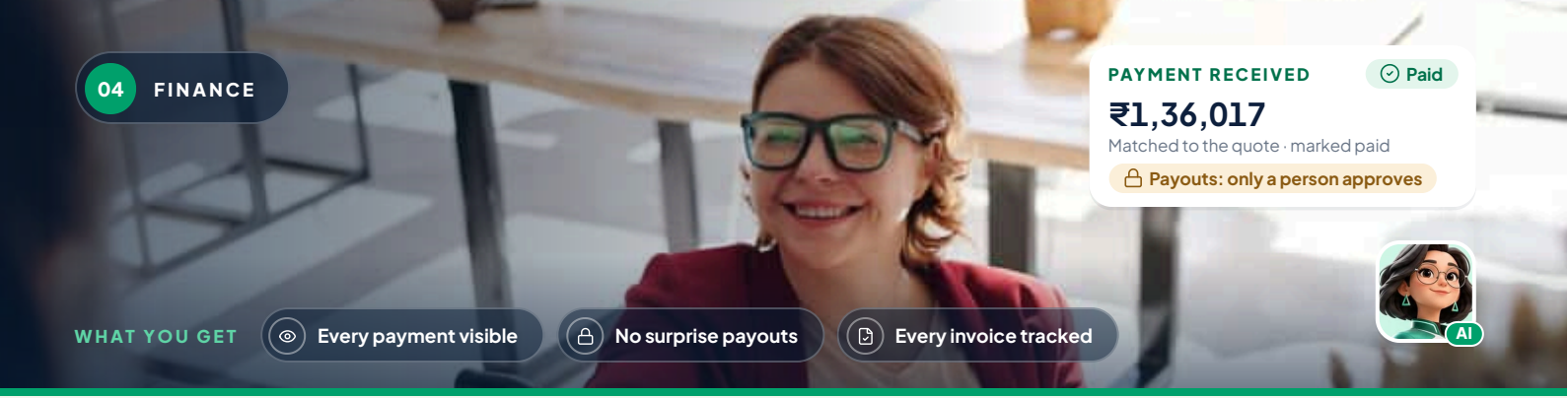
19-document checklist
Per trip, with secure upload links for customers and branded voucher PDFs.

Every service tracked
Each flight, hotel, transfer, activity and visa has its own supplier, booking and payment status.

Linked to Finance
Vendor payment requests go straight to the approval center.

AI voucher reading
Upload a supplier voucher or e-ticket; AI pulls out the services and a person confirms.

Recovery, when switched on
An unhappy guest opens a recovery case for an owner, with a follow-up task.



Know every payment. Approve every payout.

The problem: payments arrive in many places, books are kept by hand, and money can leave without anyone checking. **The fix:** customers pay by link, each payment lands on its quote, and no payout leaves unapproved.

WHAT'S INSIDE

Accounts
Money in and money out, all in one view.

Approval center
Payments and vendor bills wait for a person to approve.

Invoices
Tax invoices, proforma, credit and debit notes.

Expense management
Staff claims through your approval chain, then Finance.

Payment gateway
Razorpay for cards, UPI, net banking and pay links.

Books and reports
Ledger, trial balance, profit and loss, and export.

A DAY WITH IT

09:15
Riya pays by UPI. Her quote is marked paid; Finance raises the invoice.

12:30
Operations asks to pay the hotel. It waits for approval.

16:00
The finance head approves, and the payout goes out.



AI EMPLOYEE HERE

Hexa

Finance Assistant
Finance team

DOES ON HER OWN

- Follows up payment links by phone, once a person approves
- Reads the numbers, so she can answer questions

WAITS FOR A PERSON

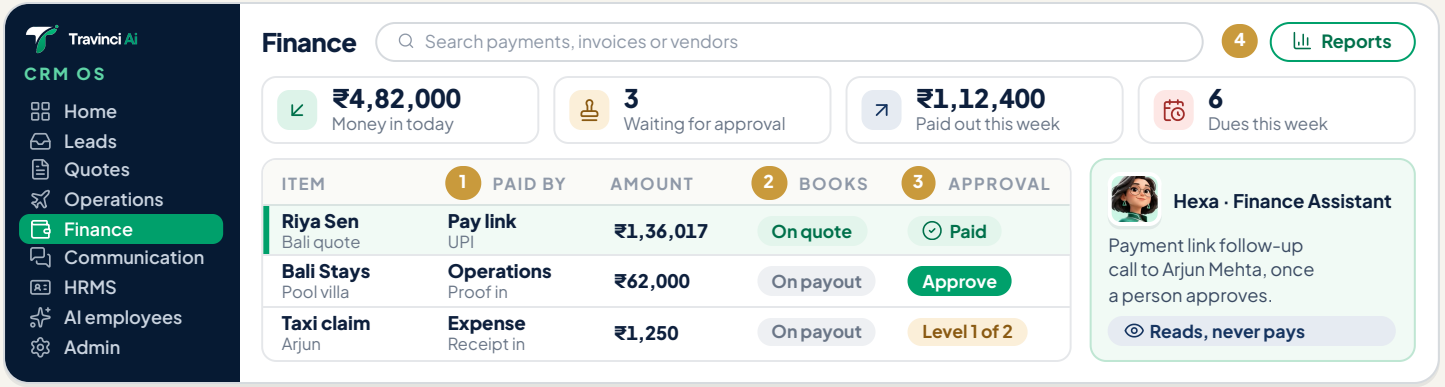
- Every payout: she can never move money
- Vendor bills and expense claims: a person signs off

WHO USES IT Accountants · Finance head · Owners

CRM OS

How money works.

Screens show example data



1 Customers pay by link

A pay link goes out with the quote: card, UPI or bank transfer through Razorpay, matched to the right customer.

2 Invoices and receipts

GST invoices with the tax split done for you; receipts Finance finalises post to the ledger.

3 Every payout approved

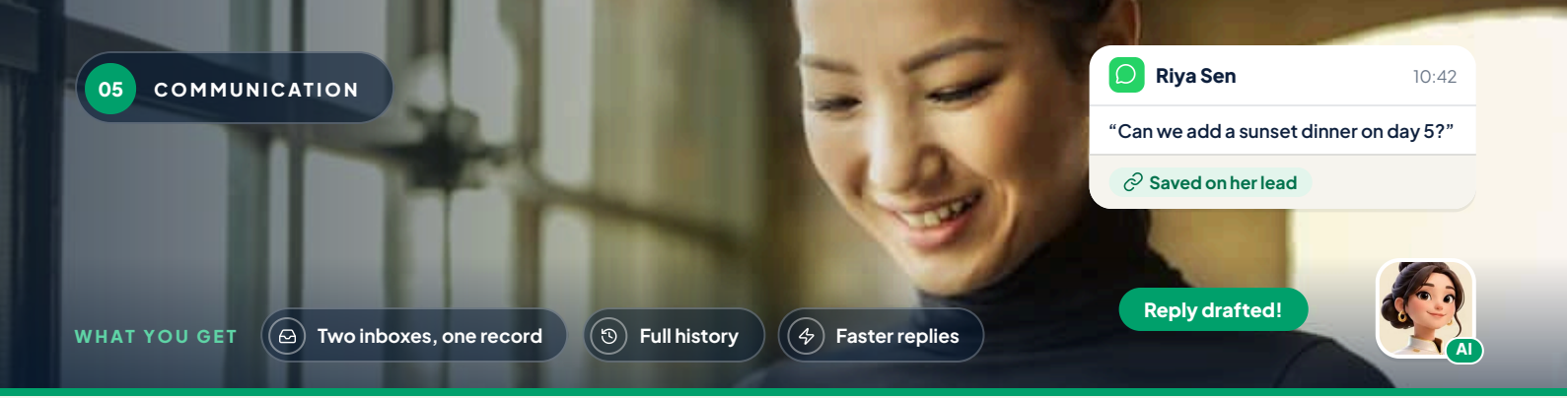
Vendor bills and staff expense claims go to the approval center, and are paid only after the right person signs off.

4 See all of it

Money in and out, what each trip earned, and reports you can export at any time.

IN DETAIL · FOR TECHNICAL TEAMS

- **One approval queue** — Receipts from sales and vendor requests from operations, side by side.
- **No self-approval** — Claims follow your approval chain; nobody approves their own claim.
- **Invoice and proof** — A vendor request needs its invoice; Finance records proof of each payment.
- **Payment keys protected** — Gateway keys are stored encrypted; charges run on a separate service.
- **Real double-entry books** — Chart of accounts, journal vouchers, ledger, trial balance, P&L and balance sheet.
- **Gateway view** — Razorpay transactions, settlements and payment links, inside Finance.
- **Collections on time** — Payment milestones with reminders before each due date.
- **Credit and debit notes** — Proforma, tax invoice, credit and debit notes, with the tax split done for you.



Every conversation in one place.

The problem: chats sit on salespeople’s own phones and mailboxes, so when someone is away, nobody knows what was said. **The fix:** WhatsApp and email each get a shared inbox, every message is saved on the right customer, and anyone can pick up.

CRM OS

WHAT’S INSIDE

WhatsApp inbox
A shared team inbox on the official WhatsApp Business API.

Email inbox
Gmail and Microsoft 365 mailboxes inside the CRM.

AI email reading
AI sums up and sorts incoming email.

Calls
Click-to-call, recordings and missed-call leads.

Templates
Approved messages, sent in one click.

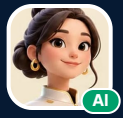
Linked to the lead
Every message saved on the right customer.

A DAY WITH IT

10:42
Riya asks on WhatsApp for a sunset dinner. The chat lands on her lead.

11:05
The hotel emails her voucher. Anaya links it to her booking and drafts a reply.

11:07
Priya checks the draft and sends it. Both threads sit on Riya’s record.



AI EMPLOYEE HERE

Anaya

Personal Assistant
Reports to Priya

DOES ON HER OWN

- Reads every incoming email, sums it up and files it on the right record
- Drafts the reply for a person to send

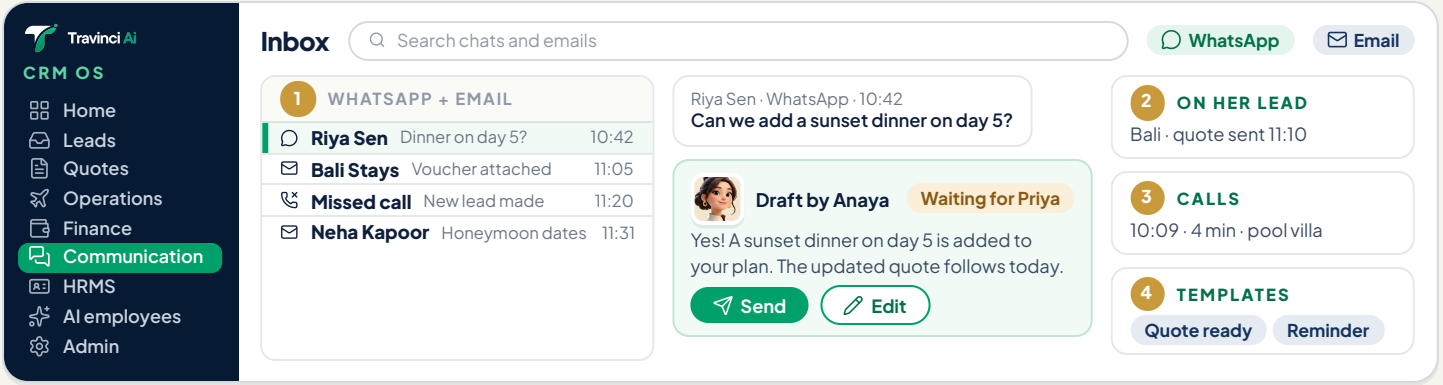
WAITS FOR A PERSON

- An AI-sent reply waits for approval of its exact text
- A person checks and sends every draft

WHO USES IT Sales team · Operations · Support

How the inbox works.

Screens show example data



1 WhatsApp and email together

Connect your WhatsApp numbers and Gmail or Microsoft 365 mailboxes. Chats and emails land on the right lead.

2 On the right customer

Each message is linked to the right lead or booking by itself. Open a customer and see every conversation in order.

3 Calls on the record

Calls are logged on the lead with how they went, so the next person knows what was said.

4 Ready templates

Approved WhatsApp and email templates for quotes, reminders and updates, sent in one click.

IN DETAIL · FOR TECHNICAL TEAMS

Secure sign-in to mailboxes
Gmail and Microsoft 365 connect by secure sign-in; new mail arrives every 2 minutes.

New chats become leads
A new WhatsApp chat creates a lead, so no enquiry is missed.

Files itself
By booking reference to the booking, by email to the lead, by sender to the vendor.

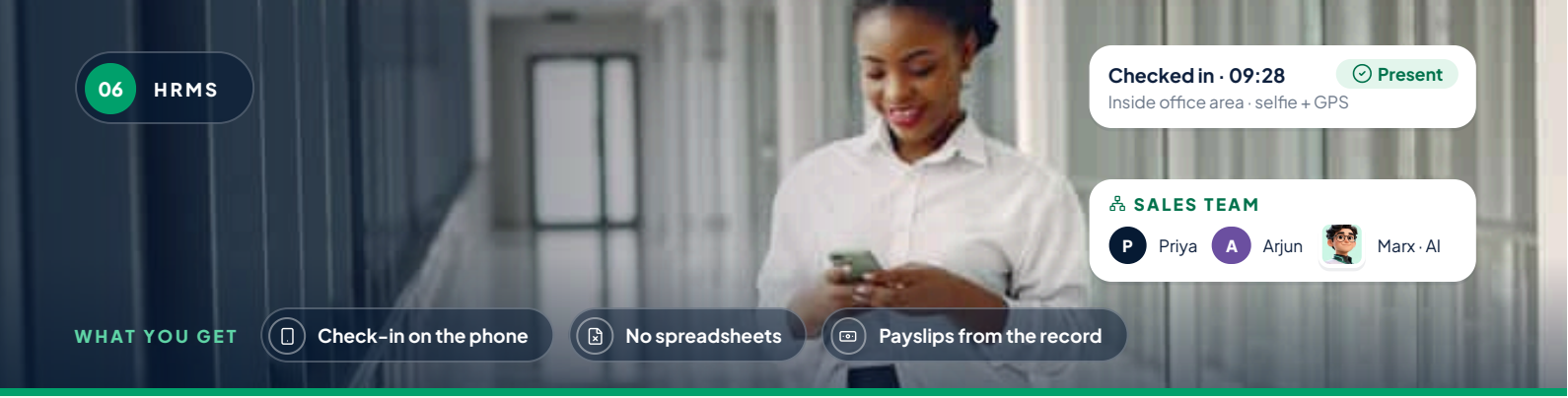
Access by design
Sellers see their own mail, managers their team's; every support view is logged.

Attachments understood
Vouchers, tickets, visa documents, invoices and itineraries are read and sorted.

Missed-call leads
A missed call becomes a lead, with click-to-call back from the lead.

Approval before AI replies
An AI-sent reply waits for approval of its exact text.

Team chat and alerts
Real-time notifications, staff chat, announcements and video meetings.



Attendance and payroll. No spreadsheets.

The problem: attendance, leave and salaries live in registers and spreadsheets, and month end means copying numbers. **The fix:** staff check in on their phone, managers approve leave from anywhere, and payslips come from attendance and leave.

WHAT'S INSIDE

Employee management
Profiles, departments and a 5-step onboarding.

Team management
Your hierarchy: who reports to whom.

Attendance
Selfie + GPS check-in for office and field teams.

Leave management
Requests, approvals and leave balances.

Roster
Shifts, weekly offs and rosters.

Payroll
Salary, payslips and statutory deductions.

A DAY WITH IT

09:28
Priya checks in at the office with a selfie.

11:00
Arjun asks for Thursday off; his team lead approves it on the phone.

Month end
Payslips are ready from attendance and leave.



AI EMPLOYEES HERE

In your org chart

ON THEIR OWN

- Can sit in your org chart, with a manager or team
- Show in your team structure, like staff

WAITS FOR A PERSON

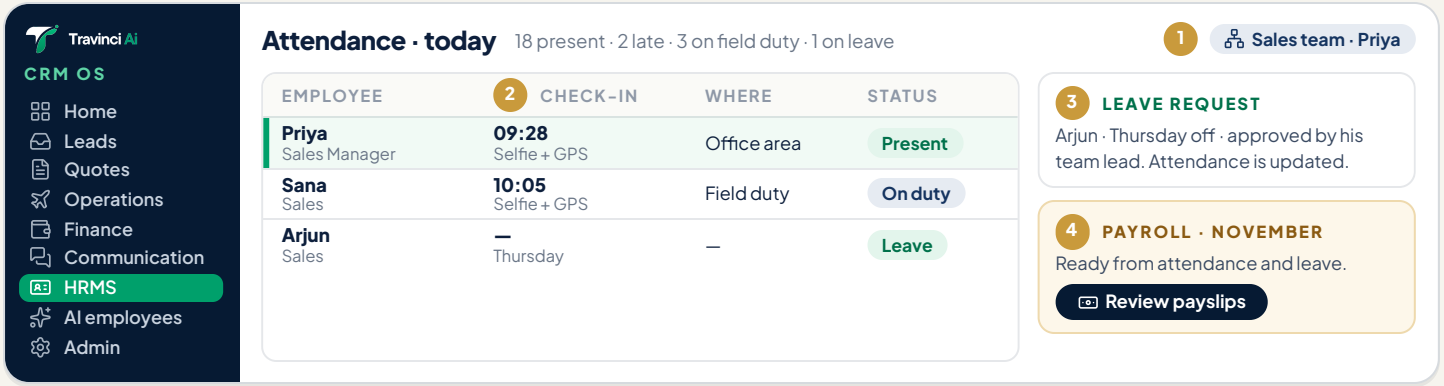
- Attendance and payroll stay out of their reach
- HR changes go through approval levels, and are logged

WHO USES IT HR team · Managers · Every employee

CRM OS

How HRMS works.

Screens show example data



1 Your team structure

Add employees, departments and reporting lines once. The same hierarchy decides who gets leads and who approves.

2 Check in on the phone

Staff check in with a selfie and GPS, in the office area or on field duty. Managers see who is in, late or out.

3 Shifts and leave

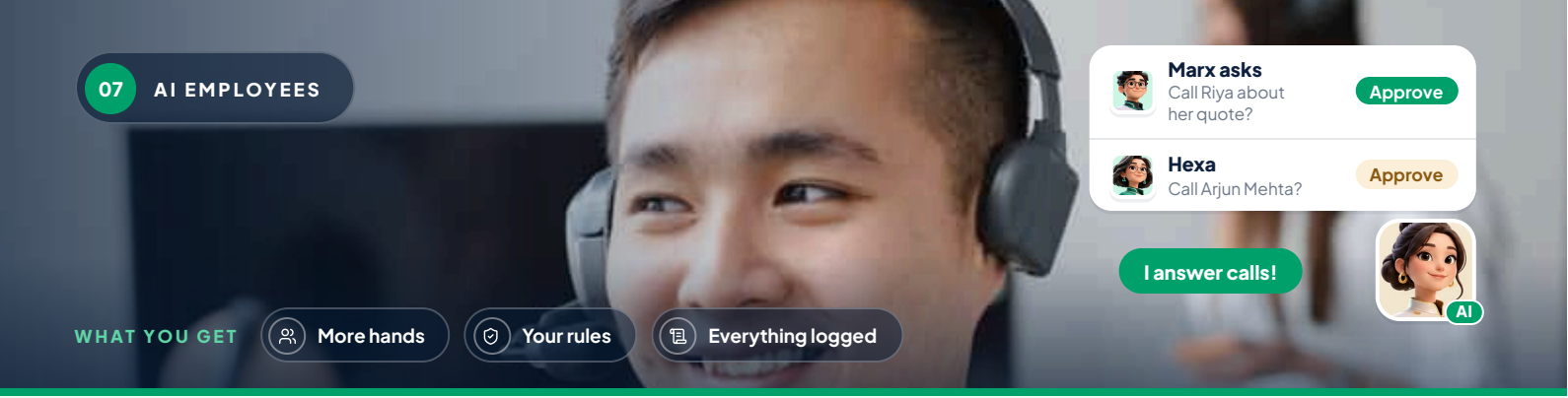
Set shifts, weekly offs and rosters. Leave goes to the right manager; approved days update attendance by themselves.

4 Payroll from attendance

Payroll is worked out from attendance and leave, so payslips are ready without anyone copying numbers.

IN DETAIL · FOR TECHNICAL TEAMS

- **Trusted attendance** — Geofence, GPS accuracy, selfie rules and device registration; offline punches sync later.
- **Maker-checker** — Approval levels with no self-approval; payslips held, released or reissued.
- **Day status by itself** — Present, half day, absent, leave, holiday or week-off, night shifts included.
- **Self-service** — Staff see payslips and requests; a manager portal never shows salaries.
- **Leave by policy** — Policies by department, grade or branch, with multi-level approval.
- **Onboarding in one sitting** — A 5-step wizard creates the employee, salary structure and login.
- **Statutory payroll** — PF, ESI, professional tax, tax regimes, bank files and full-and-final settlement.
- **Training** — Courses with quizzes and certificates for your team.



WHAT YOU GET · More hands · Your rules · Everything logged

Hire AI teammates. Keep control.

The problem: callbacks, follow-ups and reminders slip when your team is busy, and general AI tools do not follow your rules. **The fix:** AI employees built into CRM OS work next to your staff, each with a name, a job and limits; anything risky waits for a person.

WHAT'S INSIDE

AI employees
Create and manage AI staff with a name, a role and limits.

Tasks
Schedules, callbacks, follow-ups and reminders.

Playbooks
Step-by-step rules for each situation.

Knowledge Hub
Your policies and guides for the AI to use.

Voice AI
Can answer and make calls, when switched on.

Approvals and log
Risky actions wait; every action is recorded.

A DAY WITH IT

09:00
Anaya answers an incoming call and opens a lead for the caller.

11:30
Hexa asks to call Arjun Mehta about his payment link.

15:00
Marx asks to call Riya about her quote. You approve in one tap.



AI EMPLOYEES HERE

Your AI team

ON THEIR OWN
- Answer and make calls, with a written summary on the lead
- Callbacks, follow-ups and reminders, by your playbooks

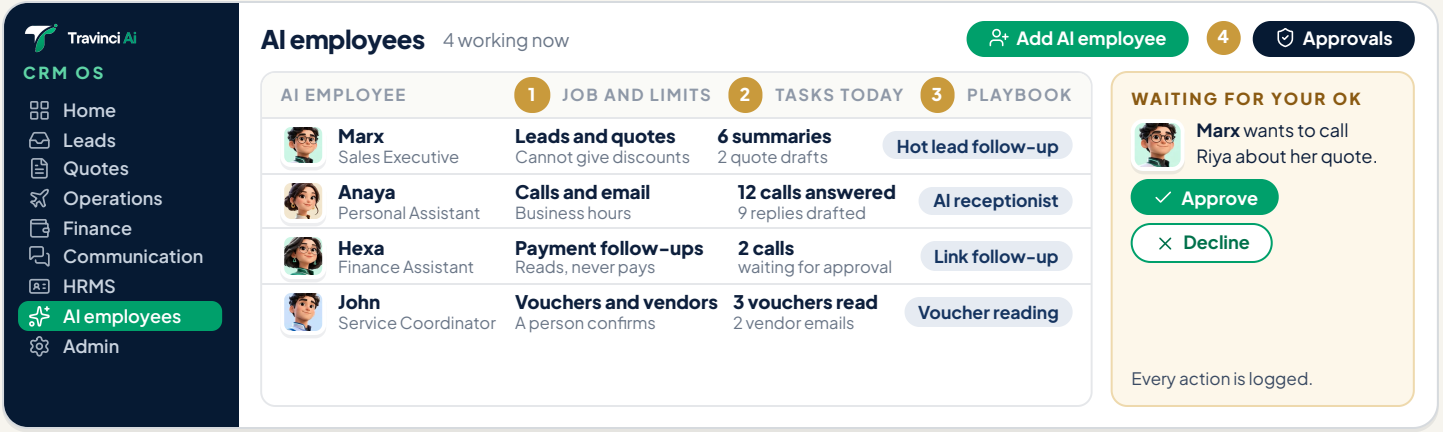
WAITS FOR A PERSON
- Risky actions wait for your approval
- New AI employees only propose at first

WHO USES IT Owners · Managers · Sales team

CRM OS

How AI teammates work.

Screens show example data



1 Give them a role

Create an AI employee with a name, a job and clear limits, like hiring staff. Choose the customers and actions they touch.

2 Give them tasks

Callbacks and follow-ups go on their schedule. They work through the list and report on the lead.

3 Teach them how

Playbooks set the steps for each situation. The Knowledge Hub gives them your policies and guides.

4 You stay in charge

Risky actions wait for your approval, every action is logged, and new AI employees only propose at first.

IN DETAIL · FOR TECHNICAL TEAMS

AI receptionist
When switched on, answers calls, recognises callers, captures the enquiry and transfers.

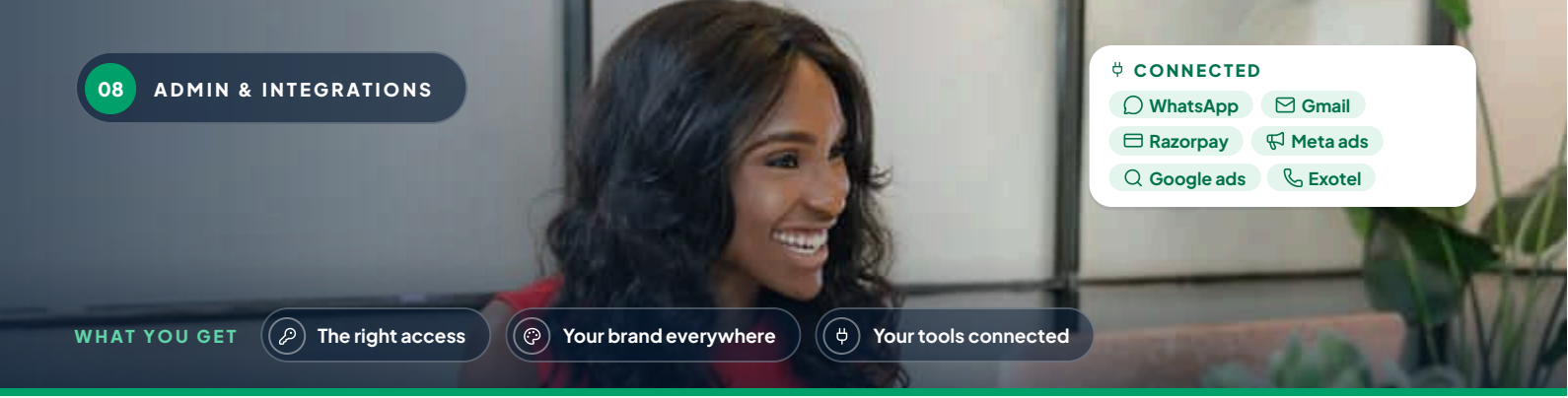
Read-only on calls
On a call the AI can read facts, never edit, pay, book or give discounts.

Every call written down
Recorded, transcribed and summed up on the lead: needs, objections and next steps.

Respects quiet hours
Consent, do-not-call lists and quiet hours are checked before every call.

Never makes things up
A guard blocks unchecked prices, availability or hotel claims before they are spoken.

Budget and limits
A daily AI budget and a per-minute limit per company.



08 ADMIN & INTEGRATIONS

CONNECTED
WhatsApp · Gmail · Razorpay · Meta ads · Google ads · Exotel

WHAT YOU GET — The right access · Your brand everywhere · Your tools connected

Your rules. Your brand. Your tools.

The problem: every company works its own way, and software that ignores your approvals, taxes and brand gets worked around. **The fix:** set access, approval chains, tax and pricing rules and your logo once, then connect the tools you already use.

WHAT'S INSIDE

User management
Invite, activate and retire users.

Permissions
Access by department or by person.

Company rules
Approval chains, pricing and tax settings.

Expense approval chain
Who approves which claims, level by level.

Branding
Your logo and details on every document.

Integration hub
Your connected providers, keys and switches in one place.

GETTING STARTED

First
Your admin adds the team and sets who can see what.

Next
WhatsApp, Gmail, Razorpay and your ad accounts are connected.

Then
Leads arrive on their own, and every rule is already in place.



AI EMPLOYEES HERE

Set up like staff

ON THEIR OWN
- Use the AI provider you connect: OpenAI, Claude, Gemini or DeepSeek
- If one provider fails, the next takes over

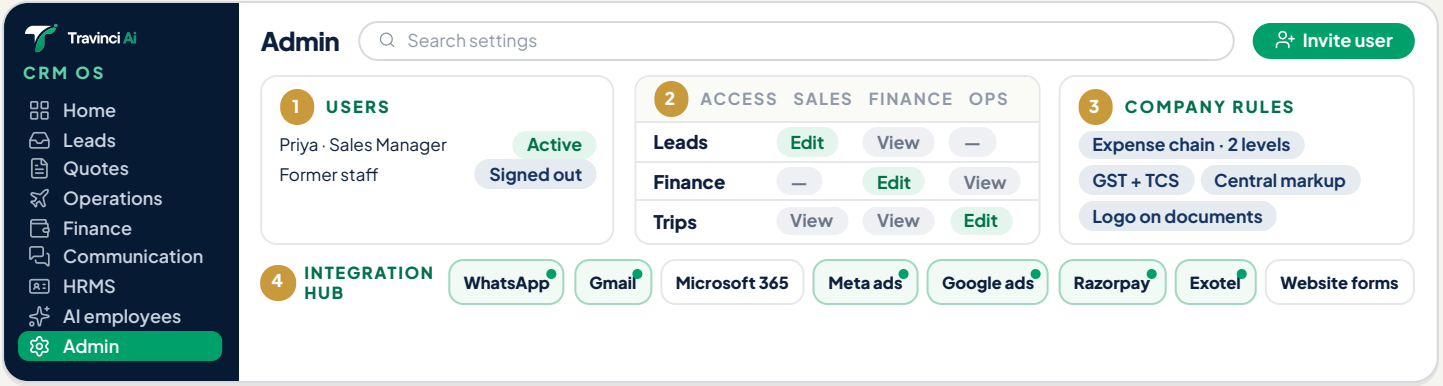
WAITS FOR A PERSON
- Roles and limits are set by your admin
- Every AI decision is in the audit trail

CRM OS

WHO USES IT Company admin · Owners · IT team

How setup works.

Screens show example data



1 Users and access

Invite staff, activate them, and switch them off when they leave. Passwords can be reset in a click.

2 Permissions that fit

Give access by department or by person, so each role sees and does only what it should.

3 Your company rules

Approval chains for expenses, your pricing and tax settings, and your logo and details on every document.

4 Connect your tools

Meta and Google lead ads, WhatsApp, Gmail, Microsoft 365, Razorpay, Exotel and your website forms.

IN DETAIL · FOR TECHNICAL TEAMS

Company isolation
Every record belongs to one company; another company's data is never shown.

Full audit trail
Approvals, AI decisions, HR changes and access are all logged.

Layered permissions
Sign-in, company, module, role and feature; a per-user block always wins.

Your AI, your order
Pick your AI providers; if one fails, the next takes over.

Secure sign-in
Optional emailed one-time code, limited attempts, and sessions you can end at once.

Sessions ended at once
Sign a user out of every device the moment they leave.

Encrypted keys
Integration keys and tokens are encrypted and masked.

Your own sign-in link
Each company signs in through its own link; a session can't cross companies.

What every buyer asks us. Straight answers.

Does it fix my problem?

If leads go cold, quotes take hours or payroll lives in spreadsheets: yes. Each module spread shows how.

Can I buy only what I need?

Yes. Start with one module. The rest switch on when you grow, on the same customer record.

Will it work with my tools?

WhatsApp, Gmail, Microsoft 365, Meta and Google ads, Razorpay, Exotel and your website forms.

p. 48

Who controls the AI?

You do. No AI employee can move money, risky AI actions wait for a person, and every AI action is logged.

p. 46

Is my data safe?

Yes. Every record belongs to your company only, keys are encrypted, and every sensitive action is logged.

p. 51

Will it fit how we work?

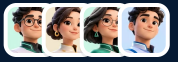
Yes. Roles, approvals, pricing, taxes and branding are set per company.

p. 48

Who will I deal with?

One in-house team that builds, connects and supports it, and scopes any custom work with you.

p. 51



Ask us anything at the stand.

We show it on your own enquiries, quotes and team. Book a demo on the back cover.

Why growing businesses choose Travinci.

One system, not five tools
Leads, quotes, trips, money, people and email on one customer record. No copying between apps.

AI employees, not AI add-ons
AI that calls, drafts, reads and follows up, with roles, playbooks and approvals like staff.

You stay in control
No AI employee moves money, risky AI actions wait for a person, and every step is logged.

Accountability you can see
Switch on reply clocks, escalation and hand-back, measured in business hours.

Fits your business, anywhere
Your rules, roles, approvals, taxes and branding are set per company. Travinci adapts to how you work.

Start small, grow
Begin with one module. The same in-house team builds your custom integrations and apps.

SAFE BY DESIGN

Company isolation
Every record belongs to one company; other companies never see it.

Layered permissions
Company, module, role and feature; a per-user block always wins.

Encrypted keys
Integration and payment keys are stored encrypted and masked.

Full audit trail
Approvals, AI decisions, HR changes and sensitive views are all logged.

No self-approval
Nobody approves their own expense claim or payroll change.

Governed automation
Every scheduled job passes a central check; Travinci can stop them all at once.

BEYOND THE CRM, OUR TEAM ALSO BUILDS

Custom API integrations · Flight and hotel supply · Wallet integration · Android and iOS apps · Websites · Corporate software

BUILT FOR

Travel agencies · Tour operators · DMCs · Corporate travel desks · Service businesses · Growing sales teams

CRM OS

Travinci Ai

Next stop: your demo.

See it on your own business: your assistant, your brand and your customers, with your team in control.

Call
+91 97322 92224

Email
info@travinci.ai

Kolkata
Room A117, 1st Floor, City Center II, New Town, Kolkata 700156

Dubai
Horizon Building, Office 601, 6th Floor, Dubai, UAE

Book a demo

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

travinci.ai

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

START HERE
Your demo

Products, modules and AI features depend on your plan and setup. Screens, flows, people and AI employees show example data. Photos: Pexels.

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