

WHAT UNLOCKS WHAT

YACHT CHARTER CRM FLOWCHART

Roles in the Flowchart

Sales → Inquiry → Under Booking → Charter Details → Invoice

Finance → Invoice → Payments → VAT

Operations → Checklist → Charter

Admin → Overrides, audit, compliance

1. LEAD MANAGEMENT

Lead Source (Website/WhatsApp/Phone/Email/Referral/Social Media)

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Lead Type

- Individual
- Corporate
- Government
- DMC
- Concierge
- Charter Partner

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Duplicate Check (Existing Client/ Existing Company)

CLIENT LEAD FLOW

Client Consultation (Within 24hrs)

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Charter Questionnaire (Under Booking)

- Inquiry Status
- Experience Type
- Charter Date(s)
- Alternative Date (Optional)
- Duration
- Timings
- Number of Guests
- Proposed Yacht Option(s)
- Budget (Optional)
- Itinerary
- Pickup Marina (Optional)
- Catering (Optional from list)
- Entertainment (Optional from list)
- Water Sports (Optional from list)
- Transfer Required (Optional from list)
- Other Special Services

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Client Qualification

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Qualified?

YES → Client Registration (Client ID)

NO → Follow-Up Pool

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CLIENT REGISTRATION (CRM)

- **Full Name**
- **Company (Optional)**
- **Email**
- **Mobile Number**
- **Nationality (Optional)**
- **Address**
- **Client Type**
- **Preferred Communication**
- **EID / Passport (Optional)**
- **Previous Charters (Optional)**
- **VIP Level**
- **Dietary Preferences (Optional)**
- **Allergies (Optional)**
- **Notes**

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Client Approved

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2. CHARTER ENQUIRY MANAGEMENT

Create Charter Enquiry

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Assign Sales Agent

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Charter Details

- **Inquiry Date**
- **Departure Time**
- **Return Time**
- **Guests (Adults / Children)**
- **Destination**
- **Route**
- **Pickup Marina**
- **Drop-off Marina**

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Inquiry Status

- **New**
- **Contacted**
- **Proposal Sent**
- **Waiting Client**
- **Follow-Up**

- **Qualified**
- **Lost**

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Experience Selection

- **Leisure**
- **Sunset Cruise**
- **Birthday**
- **Wedding**
- **Proposal**
- **Corporate Event**
- **Government Event**
- **Fishing**
- **Overnight**
- **Multi-Day Charter**

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Next Action Created

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3. YACHT MATCHING SYSTEM (Automated)

Client Profile Created

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Agent Assignment

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Availability Check

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Matching Engine

- **Budget**
- **Guest Capacity**
- **Yacht Type**
- **Location**
- **Availability**
- **Experience**

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Matching Yachts Generated

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Shortlist Created

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Proposal Prepared (Optional Quotation)

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Proposal Sent

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Client Feedback Logged

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Alternative Options (If required)



Next Action Created



4. QUOTATION (PROPOSAL) MANAGEMENT

Selected Yacht



Proposal Includes

- **Yacht Details (Charter PDF)**
- **Photos (Charter PDF)**
- **Itinerary**
- **Charter Rate**
- **VAT**
- **Standard Charter Inclusions**
- **Special Services and F&B**
- **Terms & Conditions**



Proposal Sent



Proposal Status

- **Draft**
- **Sent**
- **Viewed**
- **Revision Requested**
- **Accepted**
- **Declined**



Client Negotiation



Final Proposal Approved



Booking Process Initiated



5. BOOKING MANAGEMENT

Proposal Accepted



Booking Created



Booking Details

- **Booking ID**
- **Charter Date**
- **Yacht**
- **Guests**
- **Duration**
- **Pickup / Drop-off**
- **Assigned Sales Agent**

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Booking Status (Dashboard) Per Charter

- **Draft**
- **Tentative**
- **Option Held**
- **Awaiting Documents**
- **Awaiting Payment**
- **Deposit Paid**
- **Confirmed**
- **Upcoming Charter**
- **Operation In Progress**
- **Completed**
- **Cancelled**
- **No Show**

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Availability Locked

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Operations Notified

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6. CONTRACT & KYC MANAGEMENT

Client Verification

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KYC Documents

- **Passport / EID**
- **Company Documents (Optional)**
- **TRN (Optional)**
- **Proof of Address (Optional)**

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Auto Generated Documents

- **Quotation**
- **Charter Details Agreement**
- **Multiple Invoices**
- **NDA (Optional)**
- **Crew Agreement (Internal)**
- **Vendor Agreements (If required)**

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Documents Sent for E-Signature

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Signed Documents Received

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Booking Confirmed

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7. COST AND OFFER TABLE

Hourly Rate

Yacht Fees

Tax Amount

Visitor Fees

Berth Fees

Security Deposit

Additional

Food

Beverages

Entertainment

Watersports

Guests Transfer

Others

Total Fees

Payment 1

Due Date 1

Payment 2

Due Date 2

Payment 3

Due Date 3

Other Costs

Standard Inclusions

Operations Staff

Buggy Driver Tips

Catering Tips

Crew Tips

Team Commission %

Agent Commission

Tax Amount

Bank Charges + VAT Total

Bank Charges Particulars

Refund APA

Total Cost

Total Offer

Total Profit

7. PAYMENT MANAGEMENT

Invoice Generated

Recurring Invoices

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Payment Schedule (Dated)

- **Deposit**
- **Final Balance**
- **Security Deposit**

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Payment Tracking

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Payment Status

- **Pending**
- **Partial**
- **Paid**
- **Overdue**

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Automatic Payment Reminders

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Receipt Issued

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Finance Approval

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Operational Release

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8. CHARTER OPERATIONS

Operations Manager Assigned



Client Interaction

- **Client Call / Meeting**
- **Charter Details Verification**
- **Final Guest Requirements**
- **Final Itinerary Review**
- **Clients Can Approve Documents & Changes Without Login**



Operations Meeting



Operations Checklists Created



Charter Planning (Major Step)



Route & Itinerary Finalized



Weather Check



Marina Coordination



Guest Manifest (Optional)



Special Requests Confirmed



Provisioning Ordered



Crew Briefing



Ready for Charter



9. CREW MANAGEMENT

Captain Assigned



Crew Assigned



Crew Schedule

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Crew Documents

- License (Optional)
- STCW (Optional)
- Passport (Optional)
- Visa (Optional)
- Medical Certificate (Optional)

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Responsibilities Assigned (Internal and External)

- Captain
- Steward
- Deckhand
- Chef
- Engineer

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Crew Acknowledgement

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Crew Ready

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10. YACHT PREPARATION

Pre-Charter Checklist

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Final Inspection

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Ready for Guest Boarding

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11. VENDOR MANAGEMENT

Vendor Database

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Vendor Categories (Optional)

- Catering
- Entertainment
- Florist
- Photographer
- Videographer
- Hotel
- Transportation
- Water Sports
- Security

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Vendor Documents

- Trade License
- TRN
- Insurance (Optional)
- Contract
- Contact Details

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Vendor Assigned

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Purchase Order Generated

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Vendor Confirmation

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Vendor Performance Rating

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12. INVENTORY & WATER TOYS

Inventory Check

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Import inclusions from (inclusion stock)

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Ready for Charter

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13. CHARTER DAY OPERATIONS

Yacht Arrival

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Yacht Setting Up

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Guest Transfer

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Service- Provider Arrival

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Guest Arrival

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Guest Check-In

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Identity Verification



Safety Briefing



Captain Introduction



Guest Boarding



Charter Started



Live Charter Status



Additional Requests Logged (Optional)



Extra Charges Recorded (Optional)



Incident / Complaint Report (If required)



Charter Completed



Guest Check-Out



Damage Inspection



Damage Report (If Applicable)



Security Deposit Review



14. FINANCIAL FLOW (Log) -

Charter financial Log (Template)

Charter Completed



Client Payment Confirmed



Vendor Payments

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Crew Payments

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Commission Breakdown

- Sales Commission
- Referral Commission
- Company Revenue

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Additional Charges (Optional)

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Security Deposit Released / Deducted

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Company Profit Calculation

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Financial Closure

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Receipts Issued

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Booking Closed

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15. POST-CHARTER MANAGEMENT

Thank You Email

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Client Feedback Request

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Online Review Request

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Guest Satisfaction Survey

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Complaint Resolution (If required)

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Gift Voucher / Loyalty Points (Template)

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Repeat Charter Reminder

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Follow-Ups (Automated)

- **30 Days**
- **90 Days**
- **Annual Reminder**

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Upsell Opportunities

- **Yacht Brokerage**
- **Yacht Sales**
- **Yacht Management**
- **Crew Services**
- **Maintenance**
- **Annual Charter Package**
- **Membership Program**

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Client Status Updated

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16. CRM PIPELINE STATUS

Charter Pipeline:

Lead → Qualified → Registered → Proposal → Negotiation → Booking → Contract Signed → Deposit Paid → Confirmed → Operations → Charter Completed → Closed Won/Lost

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Status Indicators (Color-Coded)

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17. CHARTER FLEET MANAGEMENT (BACKEND) Can create one for brokerage

Create Yacht Profile

- **Yacht ID**
- **Name**
- **Make / Model**
- **Builder**
- **Year**
- **LOA**
- **Beam**
- **Draft**
- **Engines / Hours**
- **Capacity**
- **Cabins**
- **Crew**
- **Marina**
- **Berth**
- **Hourly / Daily Rate**
- **Full Yacht Specifications**

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Media Upload

- **Photos**
- **Videos**
- **Drone Footage**

- **Brochures**
- **Virtual Tour**



Yacht Documents

- **Registration CB**
- **Insurance CB**
- **Survey B**
- **Safety Certificates B**
- **Service History B**
- **Warranties B**



Availability Calendar



Yacht Status

- **Draft**
- **Available**
- **Reserved**
- **Confirmed Charter**
- **Maintenance**
- **Out of Service**
- **Archived**



18. MAINTENANCE & COMPLIANCE (MANAGEMENT) + P&L

Maintenance Schedule



Preventive Maintenance

- **Engines**
- **Generator**
- **Air Conditioning**
- **Electrical**
- **Plumbing**



Hull Maintenance



Cleaning Schedule



Annual Survey



Registration Renewal



Insurance Renewal



Class Certification

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Safety Inspection

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Maintenance Log

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Ready for Charter

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19. AUTOMATION ENGINE (DEPLOYMENT)

Automated Workflows

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Sales

- **Lead Assignment**
- **Follow-Up Reminders**
- **Proposal Generation**
- **Quotation Approval**

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Operations

- **Crew Notification**
- **Marina Notification**
- **Vendor Notification**

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Finance

- **Multiple Invoice Generation**
- **Payment Reminders**
- **Receipt Generation**
- **Deposit Refund Reminder**

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Client

- **Booking Confirmation**
- **Charter Reminder**
- **Weather Update**
- **Thank You Email**
- **Feedback Request**
- **Birthday Reminder**