Documents

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What

Documents are all types of information carriers such as offers, invoices, itineraries, etc. All types of documents are stored in a dossier and linked to a customer: Offer, confirmation, invoice, etc.

A dossier is always linked to a travel agent (an external employee of the company).

- Customer sends an inquiry.
  - A dossier is created, assigned to an external travel agent (from Company XY) and attached to a location.
  - A document is created in the dossier.

See also **sales process.**

Create and edit

After you have created a company with a location and a dossier, you can create your first document in a dossier.
Learn how to create your first offer/itinerary here.