Dossiers

Menu: Companies ? Company ? Location ? Dossiers

What

A dossier is always linked to a location, and this location to a company. All types of documents are stored in a dossier: Offer, confirmation, invoice, etc. A dossier is always linked to a travel agent (an external employee of the company).

An automatic follow-up is created when the dossier is created. This is currently 14 days after creation. The duration can be set in days in the Global Settings.

Create a dossier

After you have created a company and a location, a dossier can be created at the location level. The dossier summarizes all the information about a trip.

Opening date
On which day the dossier is opened.

Travel Advisor
Which Travel Advisor is responsible on the client side.

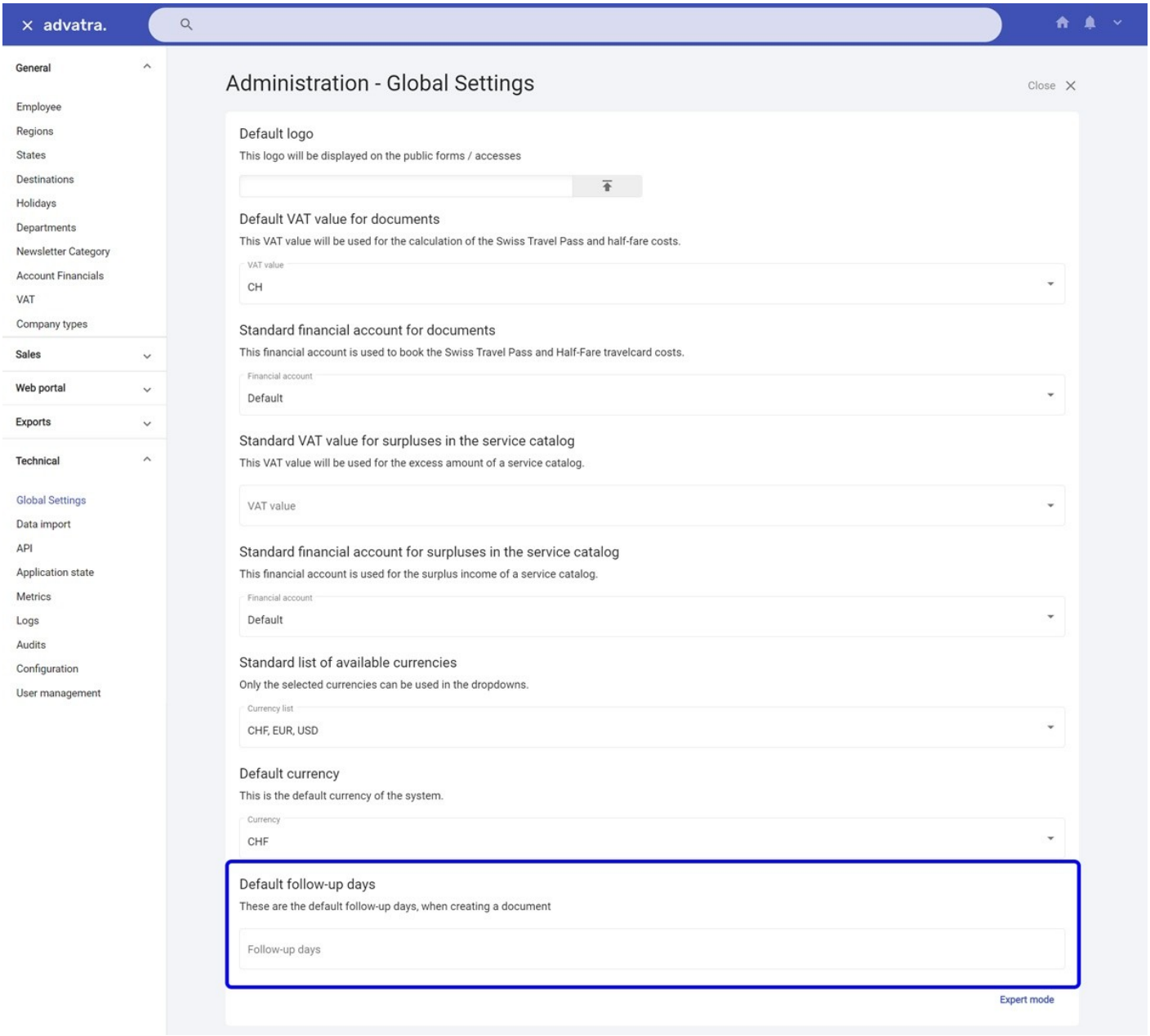
Employee
Which employee is responsible for designing and managing the trip and the dossier in general?

Responsible employee operations
In large companies, the administrative work is distinguished from the work of the travel designer (assembles the trip).

> The employee and the responsible employee can also be the same!

Set automatic follow-up

Menu: Administration ? Administration ? Technical ? Global Settings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General
Employee
Regions
States
Destinations
Holidays
Departments
Newsletter Category
Account Financials
VAT
Company types
Sales
Web portal
Exports
Technical
Global Settings
Data import
API
Application state
Metrics
Logs
Audits
Configuration
User management
Administration - Global Settings
Close
Default logo
This logo will be displayed on the public forms / accesses
Default VAT value for documents
This VAT value will be used for the calculation of the Swiss Travel Pass and half-fare costs.
VAT value
CH
Standard financial account for documents
This financial account is used to book the Swiss Travel Pass and Half-Fare travelcard costs.
Financial account
Default
Standard VAT value for surpluses in the service catalog
This VAT value will be used for the excess amount of a service catalog.
VAT value
Standard financial account for surpluses in the service catalog
This financial account is used for the surplus income of a service catalog.
Financial account
Default
Standard list of available currencies
Only the selected currencies can be used in the dropdowns.
Currency list
CHF, EUR, USD
Default currency
This is the default currency of the system.
Currency
CHF
Default follow-up days
These are the default follow-up days, when creating a document
Follow-up days
Expert mode