

Dossiers

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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

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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