Forms

Menu: Web portal ? Forms

What

A form can be any type of feedback that can be filled out by external people and returned to the form creator. For example, travel feedback.

There are two different types of forms: Dossier forms and surveys.

Surveys are public surveys and can be viewed under the main menu item Web portal. There, a link can be copied and sent to external persons.

Dossier forms are forms that are always attached to a dossier. The responses of a dossier form is visible directly on the dossier view.

Form types

Survey
Are public surveys. These can be sent to external persons with a link under Web portal ? Survey.

Dossier
A form can be attached to a dossier. This can be, for example, a billing reminder for an agency or a guide. DMC creates a form and sends it to the agency or guide as a payment reminder. The form then states that the agency or guide should provide their contact and account details so that DMC can pay.

Form statuses

No status
The admin creates a new form template.

Open
An employee selects the form template with the number of expected responses.

Filled out
All expected persons have responded to the form.

Approved
The employee/dossier manager has confirmed by clicking on the tick that the form has been completed by all and thus confirms the form.

Processed
The accounting department clicks on the tick to confirm that, for example, the commission has been paid in.

Create a from

Administration ? Web portal ? Forms
The administrator creates form templates here, which the employees can use.

Company ? Company ? Location ? Dossier
In the Dossier Forms section, they can select a template from a form created by the administrator. In doing so, he specifies how many responses he expects.
As soon as everyone has filled out the form, the status changes to Filled out. The employee can then approve the form for the accounting department.

Menu ? Administration ? Dossier forms
The accounting department has an overview of all dossiers here.

Menu ? Web portal ? Surveys
Overview over all survey forms and their response.