

To-do templates

Create to-do templates: **Menu: Administration ? Sales ? Product templates ? To-do templates**

Use to-do templates/Generate to-dos: **Menu: Companies ? Company X ? Documents (Offer, Confirmation)**



What are to-do templates?

To-do templates are templates for to-dos that can be used again and again.

To-do templates are attached to a product template and are created directly there.

For example, the to-do template "Reserve a chauffeur" is attached to the product template "Limousine service". Or the to-do template "Check hotel availability" is attached to the product template "Viktoria Jungfrau Grand Hotel".

The screenshot displays the 'Limousine' product template interface. At the top, there is a table with columns for 'Name', 'Due by', 'Internal', 'Type', and 'Actions'. Below this table, the 'Todo Templates' section is visible, containing a table with columns for 'Name', 'Due by', 'Internal', 'Type', and 'Actions'. The table lists 'Chauffeur reservation' with a due date of '1 days after creation date', 'Internal' status 'No', and 'Type' 'Confirmation Incoming'. Below the table, there is a 'Create' button. The 'Images' section shows two images of a limousine. On the right side, there is a sidebar with a list of templates: 'Limousine Service from and to the airport', 'Details', 'Sub product templates', 'Product Descriptions', 'Product Note Templates', 'Voucher Texts', 'Opening Times', 'Main service', 'Additional service', 'Markup and Margin', 'Todo Templates', and 'Images'. A 'Chat with us' button is located in the bottom left corner.

Name	Due by	Internal	Type	Actions
Chauffeur reservation	1 days after creation date	No	Confirmation Incoming	 

Create

Images

Add

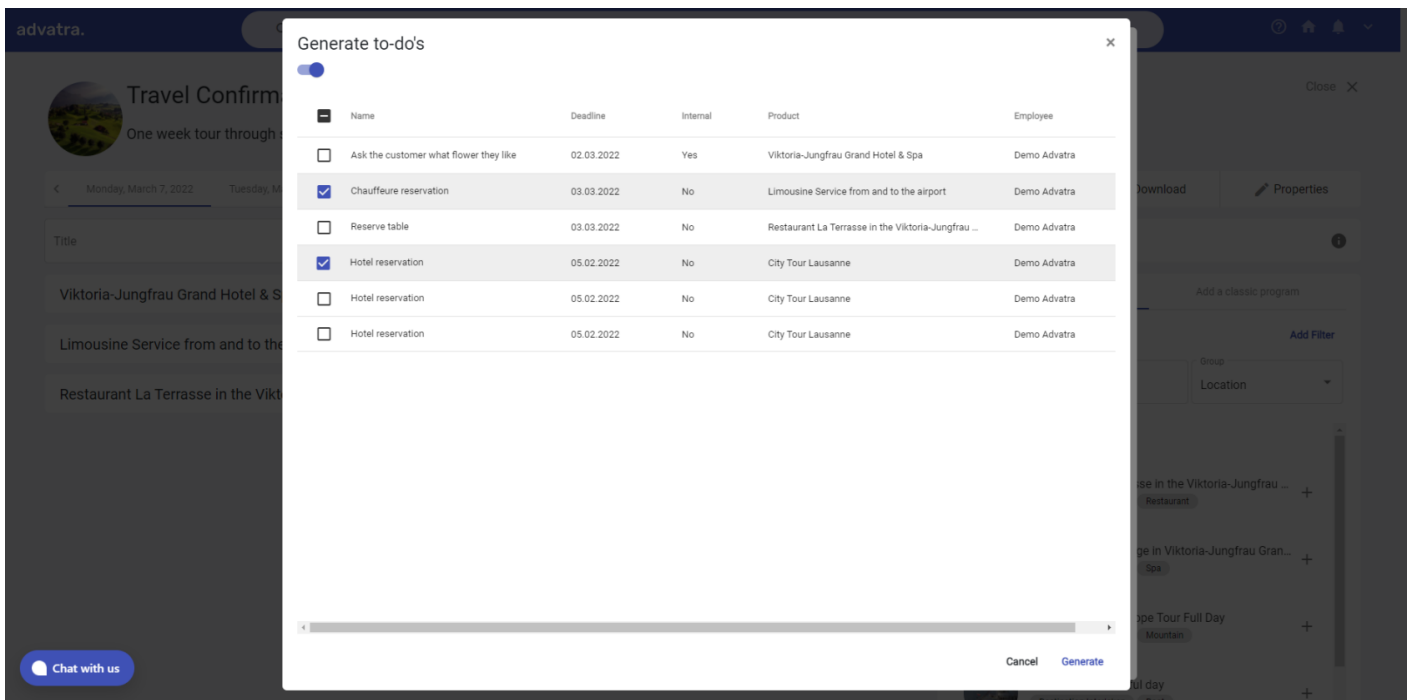
Chat with us

Where are to-do templates used?

To-do templates are used in a document (offer or confirmation).

For example, an offer is compiled with a limousine ride and an overnight stay at the Viktoria Jungfrau Grand Hotel. Now, to-dos can be generated from the to-do templates and added to the offer.

- To-do 1: Book chauffeur
- To-do 2: Check hotel availability



How are to-do templates created?

The administrator creates to-do templates directly in the product template: Administration ? Sales ? Product templates.

For example, the to-do template "Reserve a chauffeur" is attached to the product template "Limousine Service".
Or the product template "Viktoria Jungfrau Grand Hotel" has the To-do template "Check hotel availability".

Name

Name of the to-do template

Deadline in days

For example: 5 ? When is the deadline of this to-do, based on the "due by" value.

Due by

from creation day: the to-do always appears 5 days after the document has been created

before start date: the to-do always appears 5 days before the start date of the trip

Type

the to-dos can only be used on the selected document type: offer incoming or confirmation incoming

Internal or external

Internal to-dos contain information that is only relevant for your staff, i.e. for internal use

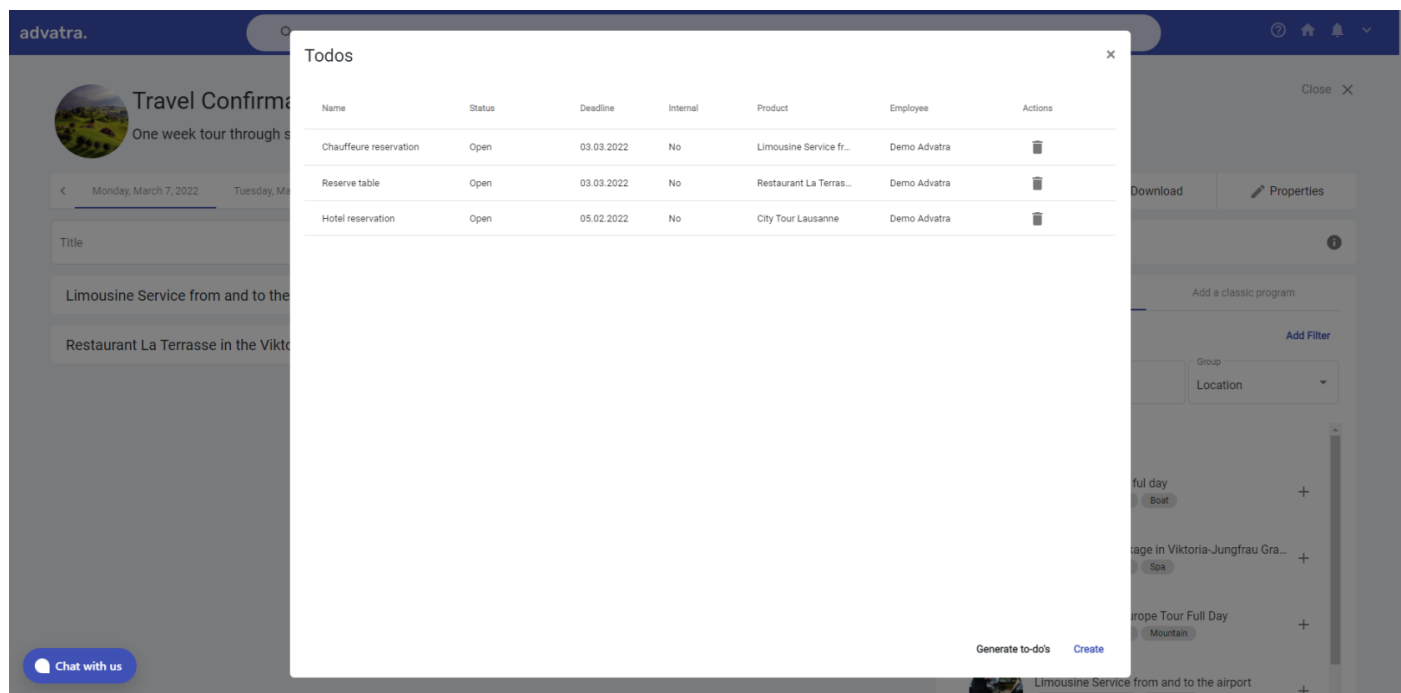
The collected information of the **external** to-dos can be viewed by your clients and/or travellers - depending on your export configuration.

How does a to-do template become a to-do?

Create or navigate to a document

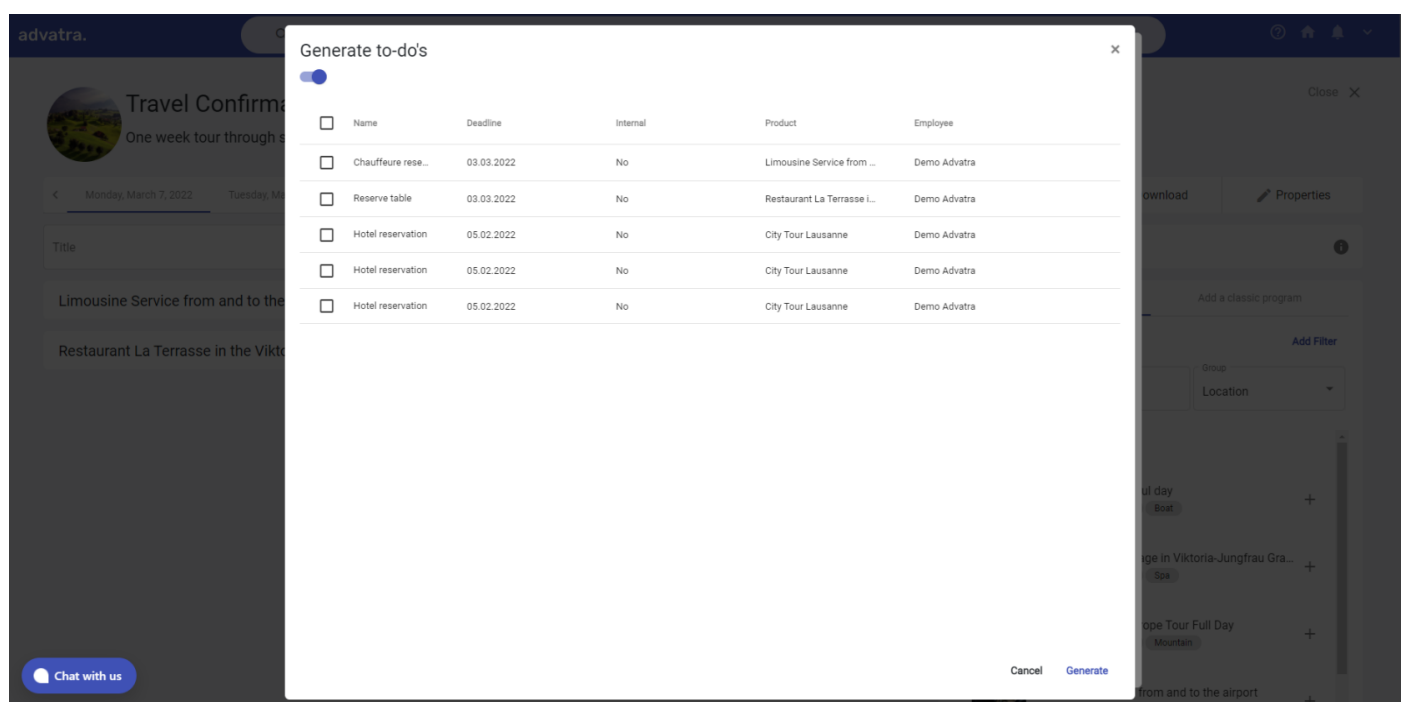
To-do templates with the type offer can only be added to an Offer, To-do templates with the type confirmation can only be added to a confirmation.

Under "More ? To-dos" there is an overview of your to-dos on your document.



Under generate to-dos, the to-do templates that are relevant for the trip can be selected and added to the document. To-dos are created from the to-do templates when they are added.

Added to-dos are automatically assigned to the "Responsible employee operations". The Responsible employee operations can be defined in the dossier setting.



How are to-dos processed?

To-dos are automatically assigned to the "Responsible employee operations". He finds an overview of his to-dos on his dashboard.

All to-dos and the current status can be viewed under Show all.

A to-do can be sent directly by e-mail:

For example, the to-do Reserve chauffeur is linked to the email address of the product template that offers the limousine service. (Product template = limousine service, attached mail address = contact person).

To-dos can be dragged and dropped between the individual columns.
