Create a company

Before you create a new company, the following information must be stored in the system: Company type and departments.

Create a company

1. Field one "First Name": If it has an official company name, just leave the first field open and enter the company name in the next field.
2. Field two "Name/Company": If it does not have an official company name, just enter first name in field one and family name in field two

Example:

Company (Brownell Travel Company)

Create a location for the company

You can create multiple locations for one company and manage it here. When you create dossiers (projects) and documents later, they will be subordinated to the locations.

Example:

Company (Brownell Travel Company)

Location 1: Brownell Birmingham, Alabama

Create a contact for the company

Here you create contacts that belong to this company. The best thing to do first is to create a travel agent with all the contact details.

Example:

Company (Brownell Travel Company)

Location 1: Brownell Birmingham, Alabama

Contact 1: Emily Smith, Travel agent

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 Travel Agency side.
- **Employee**: Which employee is responsible for designing and managing the trip and the dossier in general?
- **Responsible employee operations**: In large DMCs, the administrative work is distinguished from the work of the travel designer (assembles the trip).

Example:

Company (Brownell Travel Company)

Location 1: Brownell Birmingham, Alabama

Dossier 1: One week through Switzerland for the Kennedy family