Quick Start Guide

ADVISOR DASHBOARD



Accessing the Dashboard

Log in to TPISuitcase and navigate to the Advisor Dashboard by hovering over Dashboard in the left-hand navigation bar.

Client Travel Status

The top left section displays your clients' travel statuses, which are automatically updated based on their travel dates.



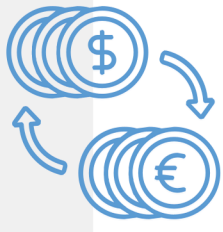


Reminders Management

The Reminder section provides a quick overview of your set reminders, which can be viewed and interacted with in your calendar.

Financial Overview

The Year to Date section offers a comprehensive view of your financial performance from the beginning of the year, complementing the Month to Date information.





Calender Display Option

The *more options* menu ☰, above and to the right of the calendar, allows you to customize how you view calendar information, providing flexibility in managing your schedule.

Interactive Calendar Feature

The calendar on the right side of the page lets you see current and upcoming important dates and allows for interaction; you can right-click the reminder task to edit and access client reservations and information directly.

