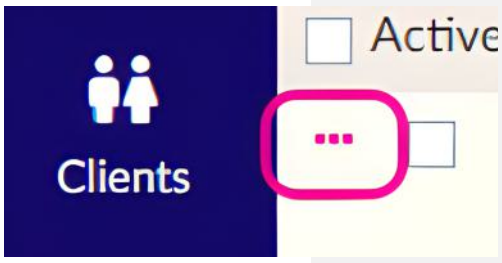
Quick Start Guide

EMAILING WEBFORMS

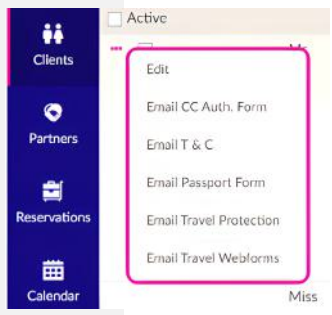


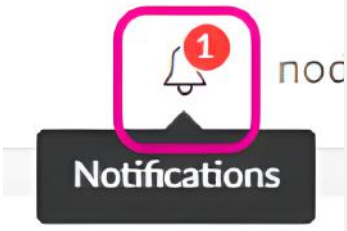
Clients Tab

Click on the Clients tab, then click the three dots (ellipses) next to the client's name on the left-hand side.

Select Webform

Select the webform you wish to email to your client. Alternatively, you can choose "Travel Webforms" or "Terms & Conditions" to include in the email.





Notification

Once clients submit a webform, you'll receive an email and a TPISuitcase notification, visible in the upper-right corner of the screen.

Client Details

When you click the notification, a new page will open with your client's newly entered details. Alternatively, you can navigate directly to the Clients tab and select your client to view this information.



Reminder #1

Webforms are sent to clients from the email address hello@yourtraveladvisor.info, and this cannot be modified.

Reminder #2

If multiple webforms are selected, your client will receive a single email containing all the selected webforms.

