TPISUITCASE

TPISUITCASE & CORE EXPLAINED:

YOUR GATEWAY TO EXPERT TRAVEL PLANNING

ADDING A CLIENT

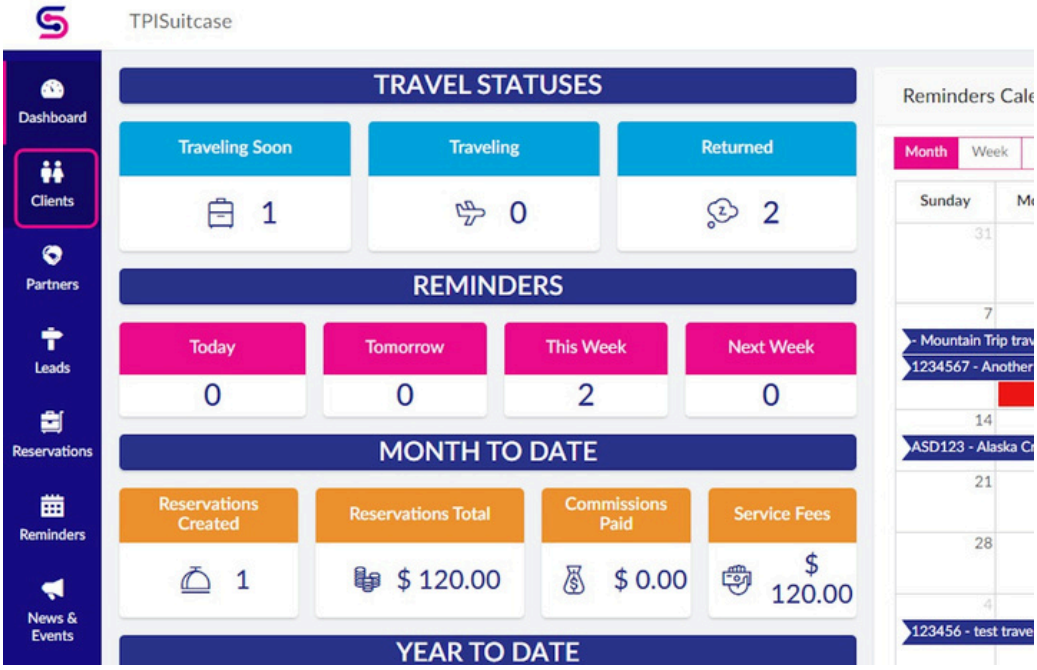
ELEVATE YOUR SKILLS WITH OUR DEFINITIVE GUIDE TO MASTERING TRAVEL PLANNERS INTERNATIONAL'S PREMIER PLATFORMS

Travel Planners International - TPISuitcase

29 Steps

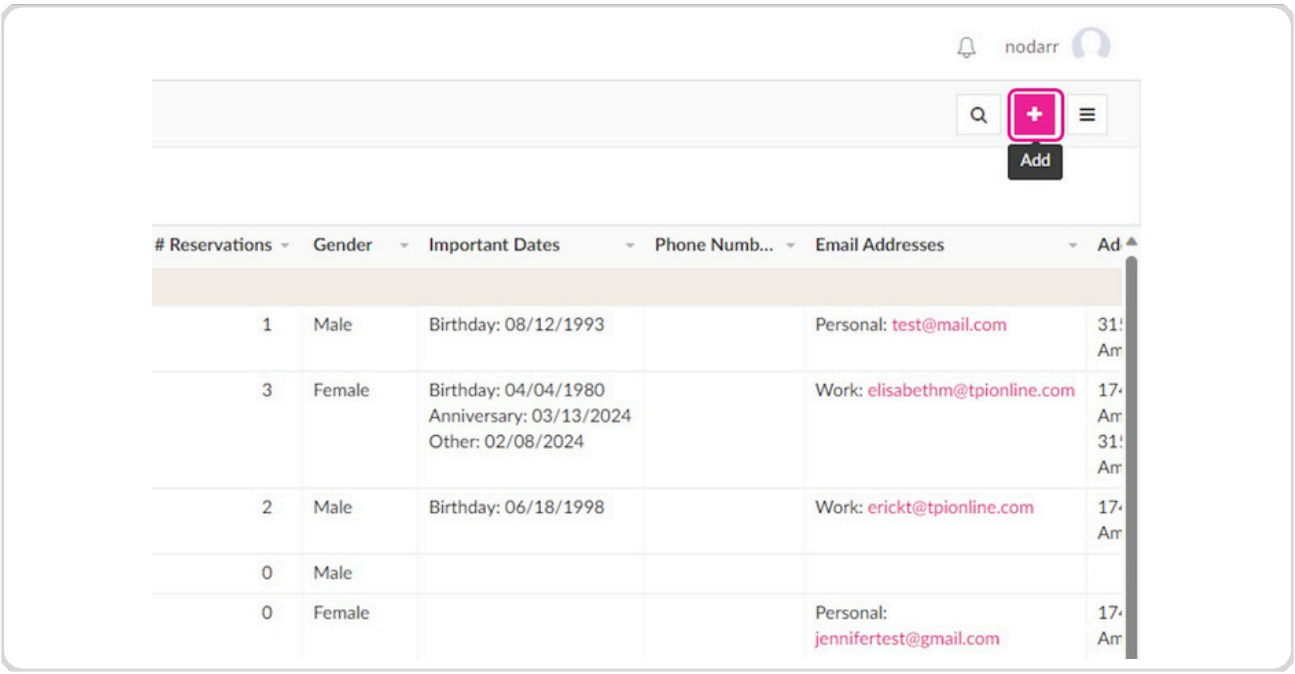
STEP 1

Click on Clients



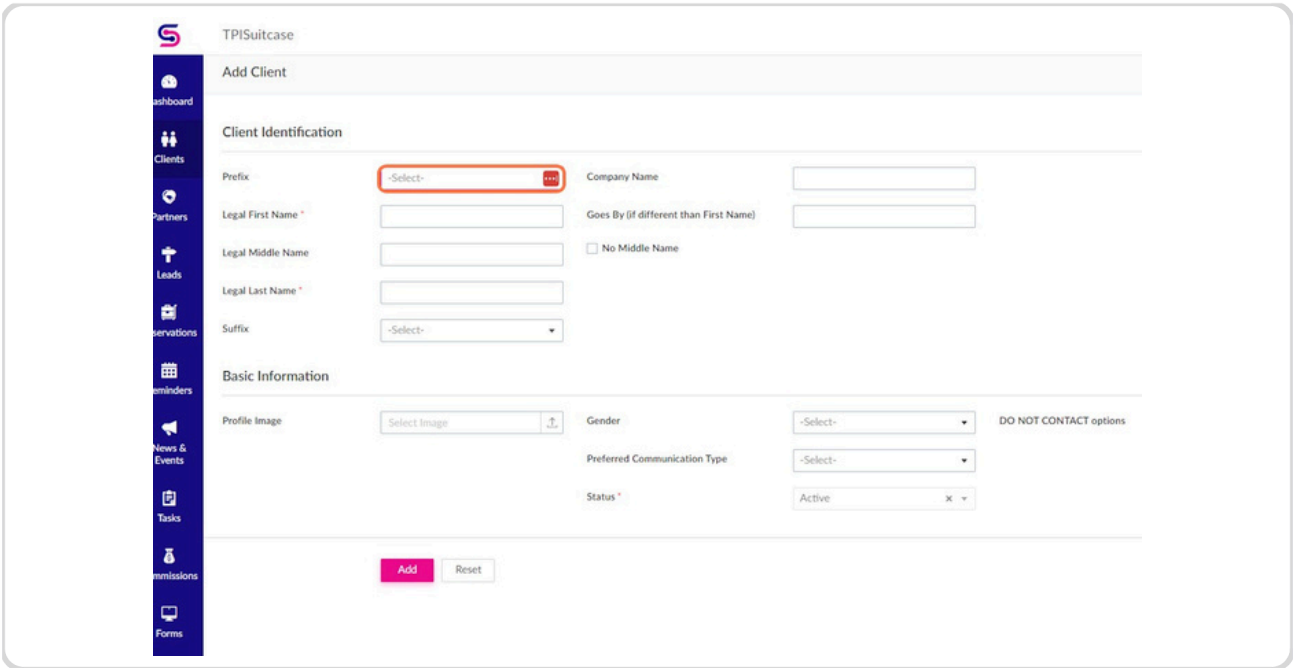
STEP 2

Click on Add



STEP 3

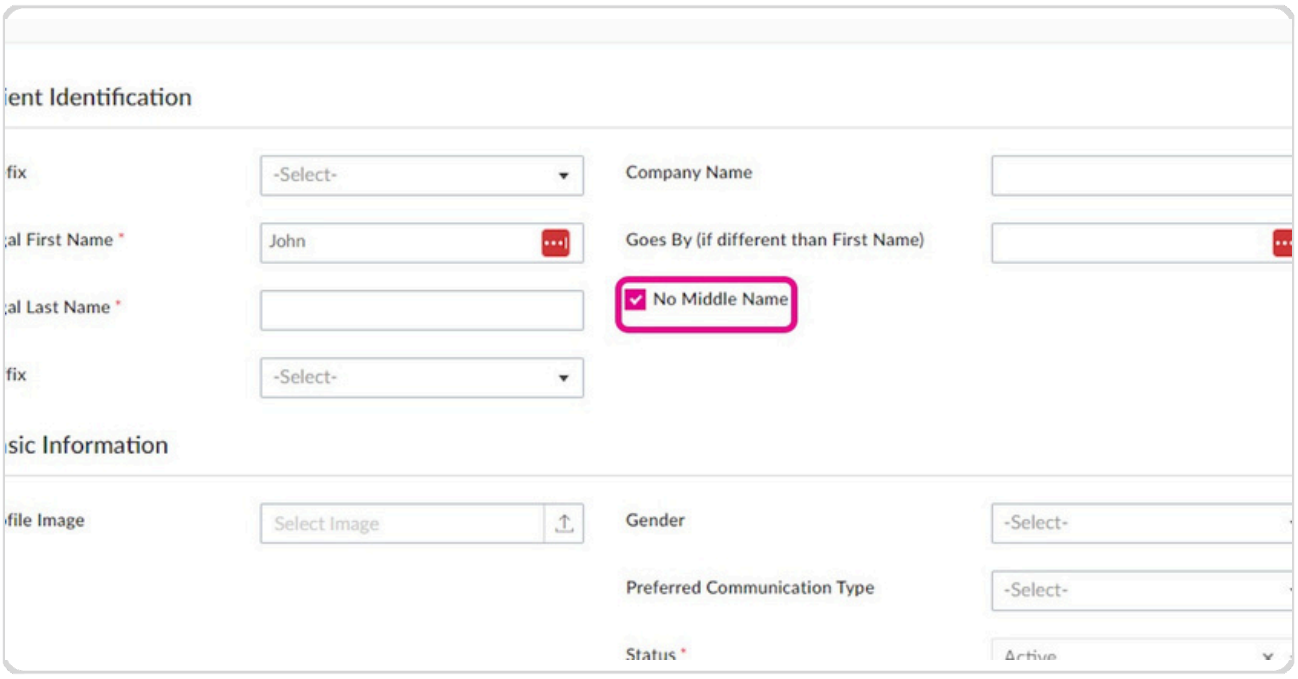
Start filling in your client's information



STEP 4

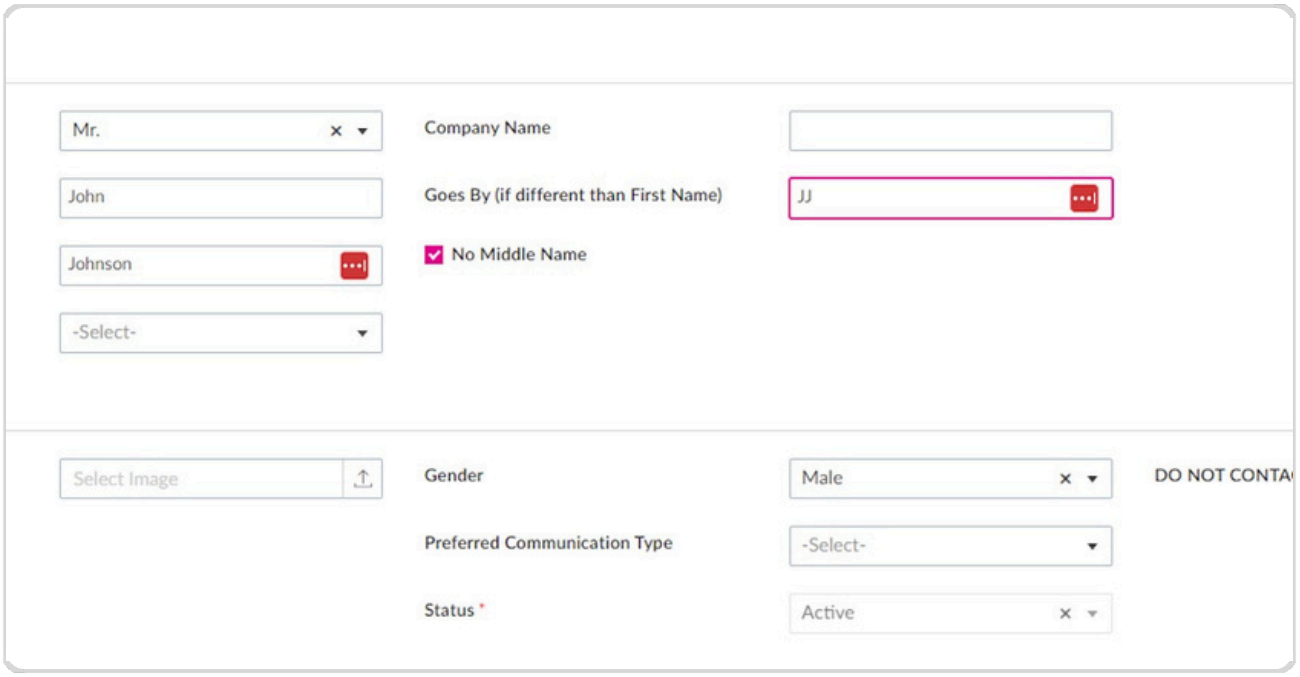
If your client has no middle name, check No Middle Name

Please do not leave this field empty, you will receive an error message when updating information is Middle name box is left empty



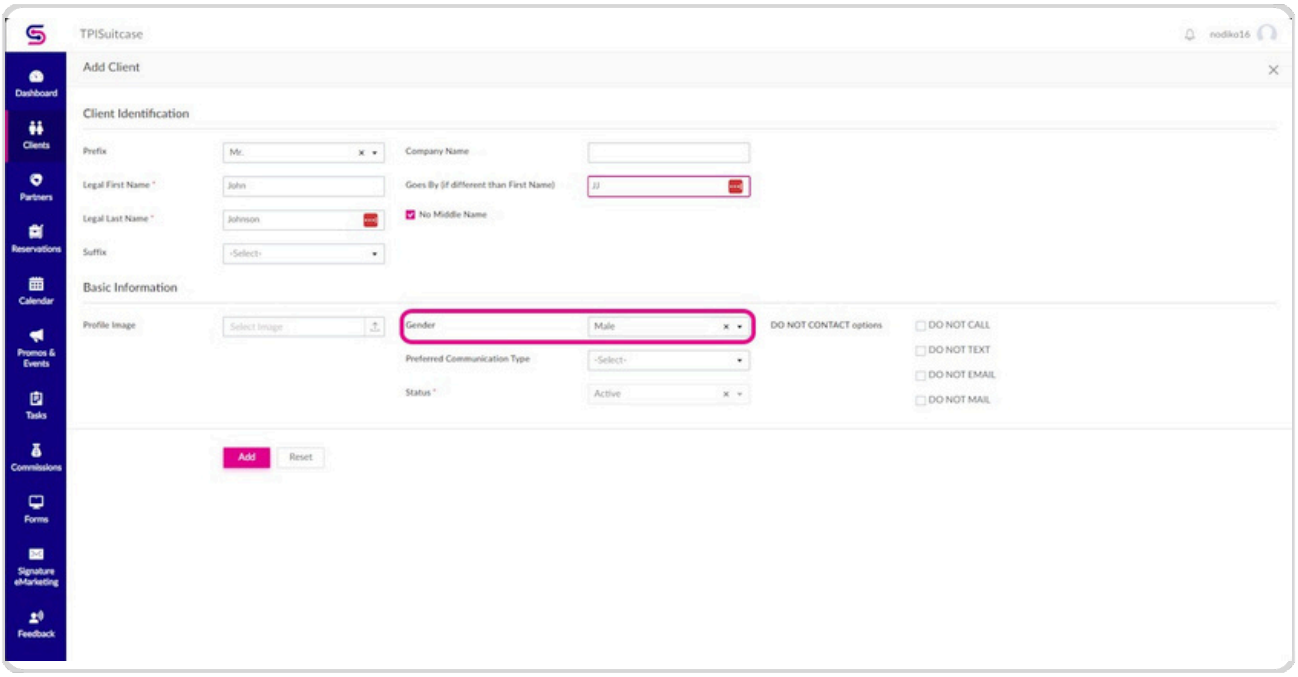
STEP 5

If your client goes by a different name, you can type in that info here.



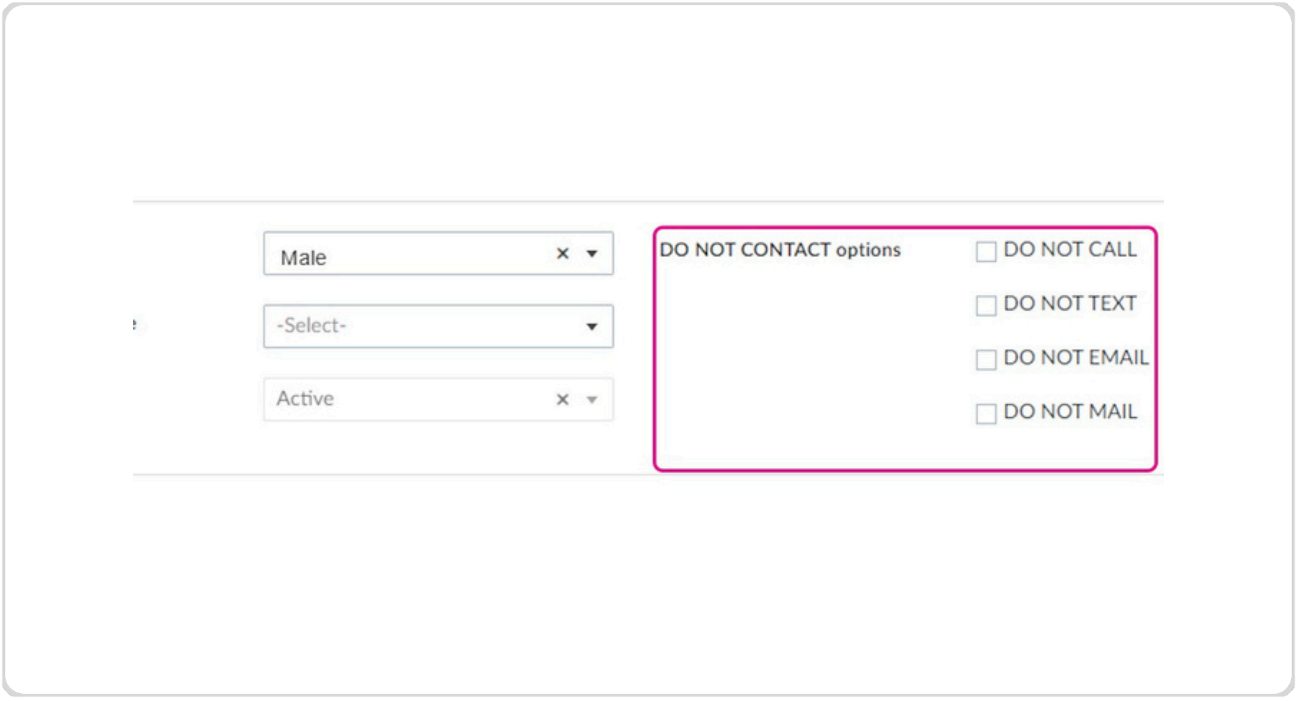
STEP 6

When you select your client's prefix, their gender will automatically change to match the prefix, you also have the option to leave this box empty or put "other" as Gender.



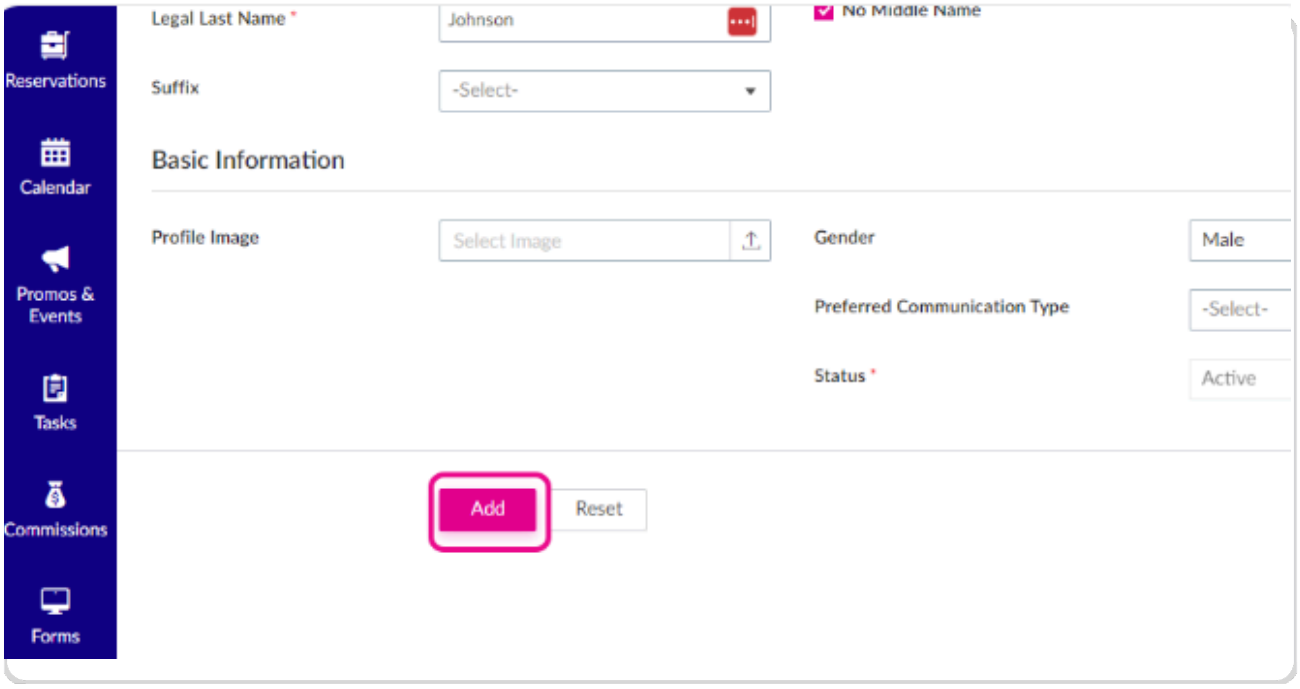
STEP 7

If your client does not want to be contacted by a certain method, you can check it for your reference.



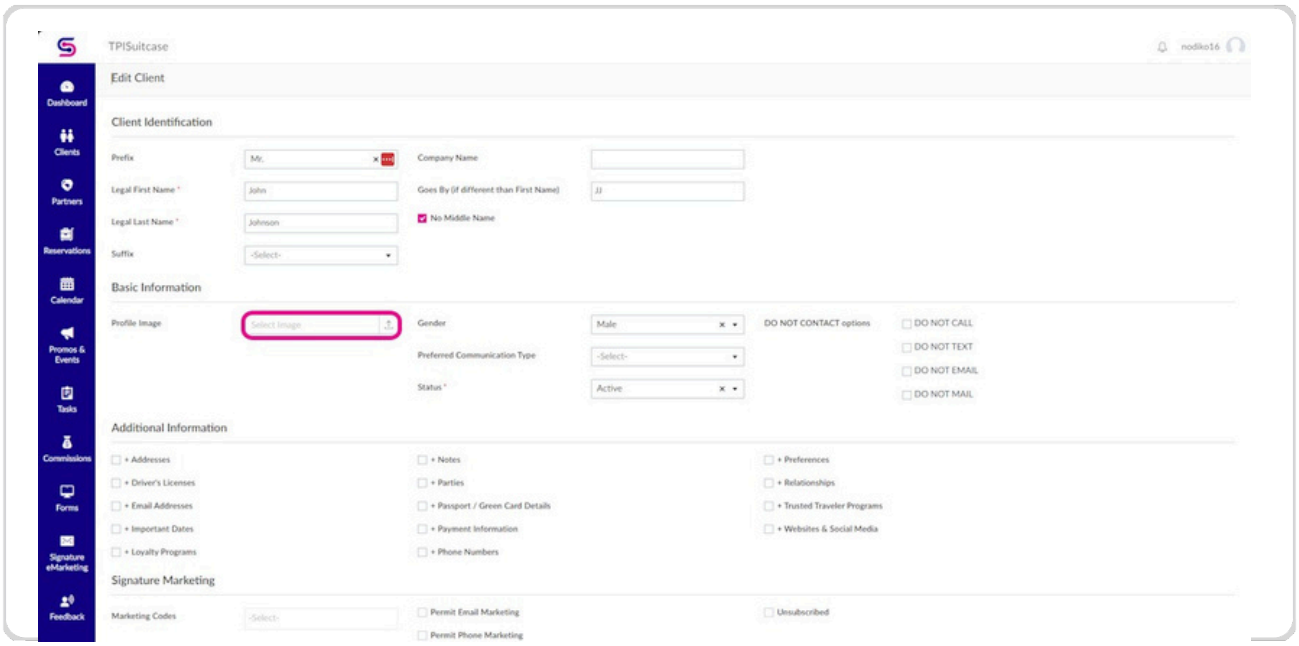
STEP 8

When you are ready to add the client to your CRM, click on the Add button on the bottom of the page



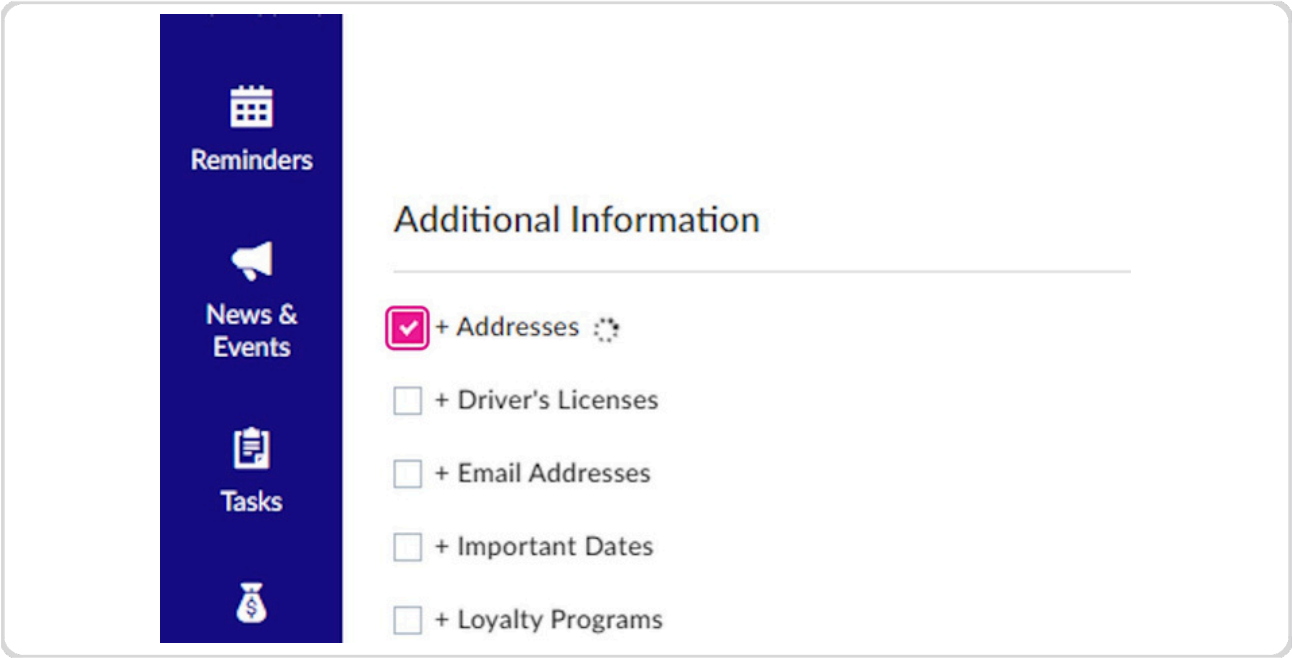
STEP 9

Your client's full profile will open up, where you can add additional information like profile image, address, email, phone number, etc.



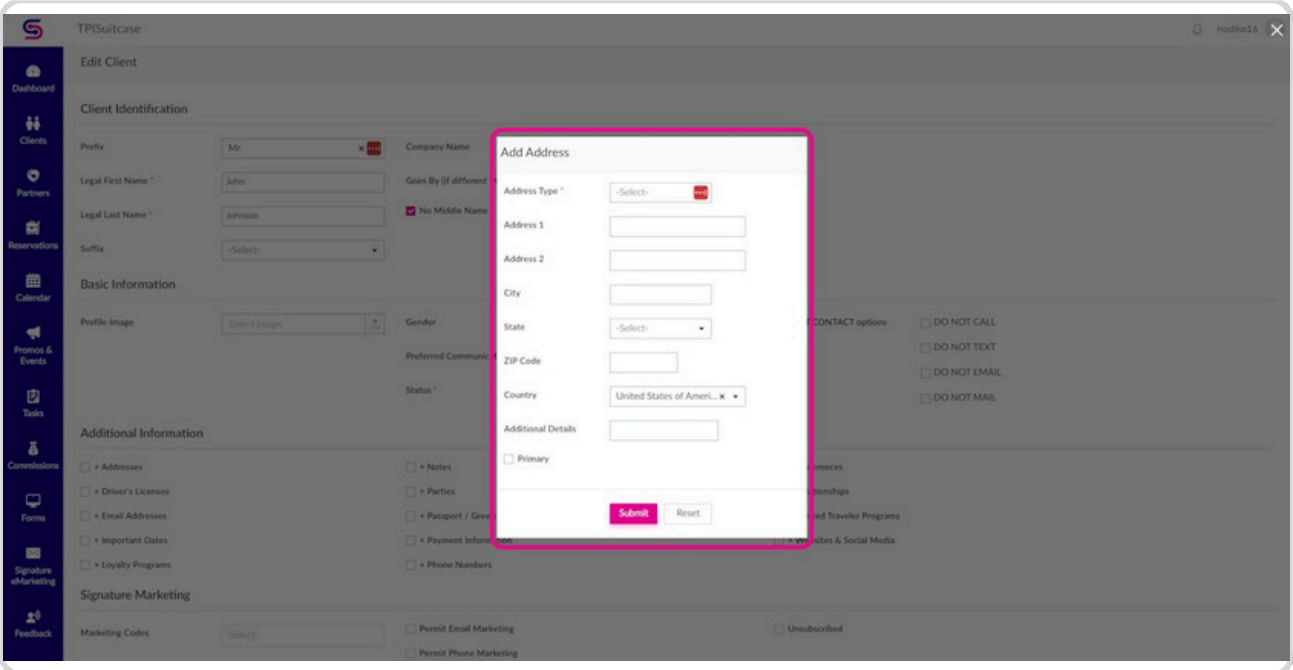
STEP 10

To add your client's address just click on the "+ addresses" button.



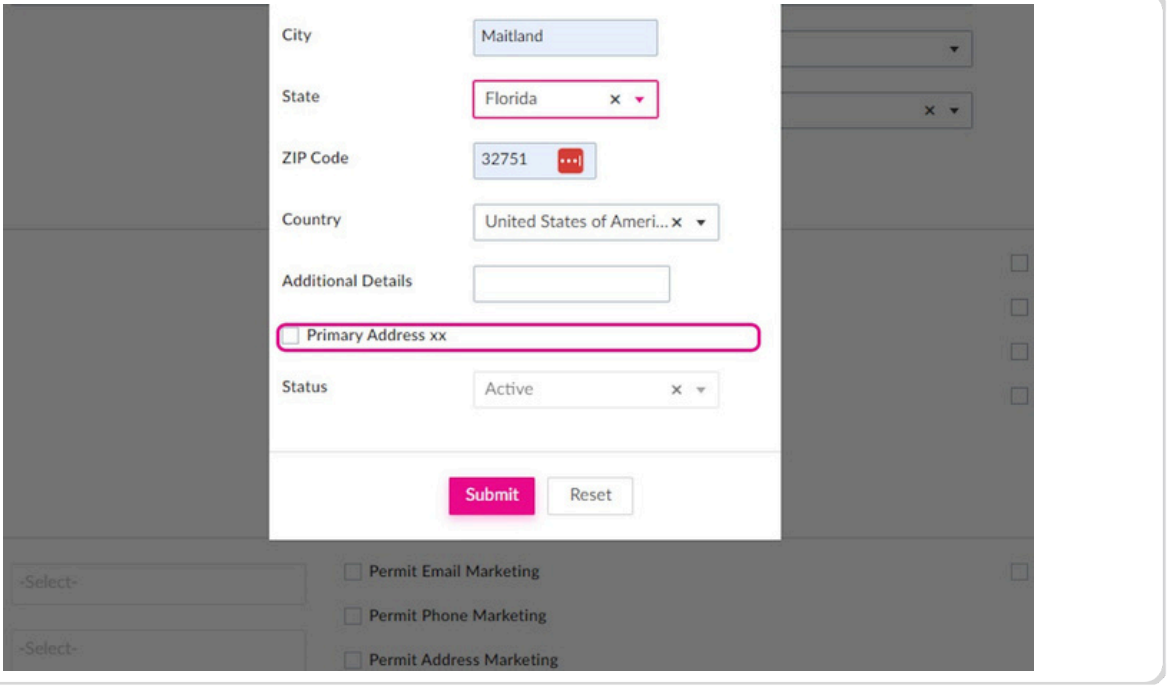
STEP 11

Fill out all the information. We use USPS address checker to make sure all addresses entered are valid US addresses.



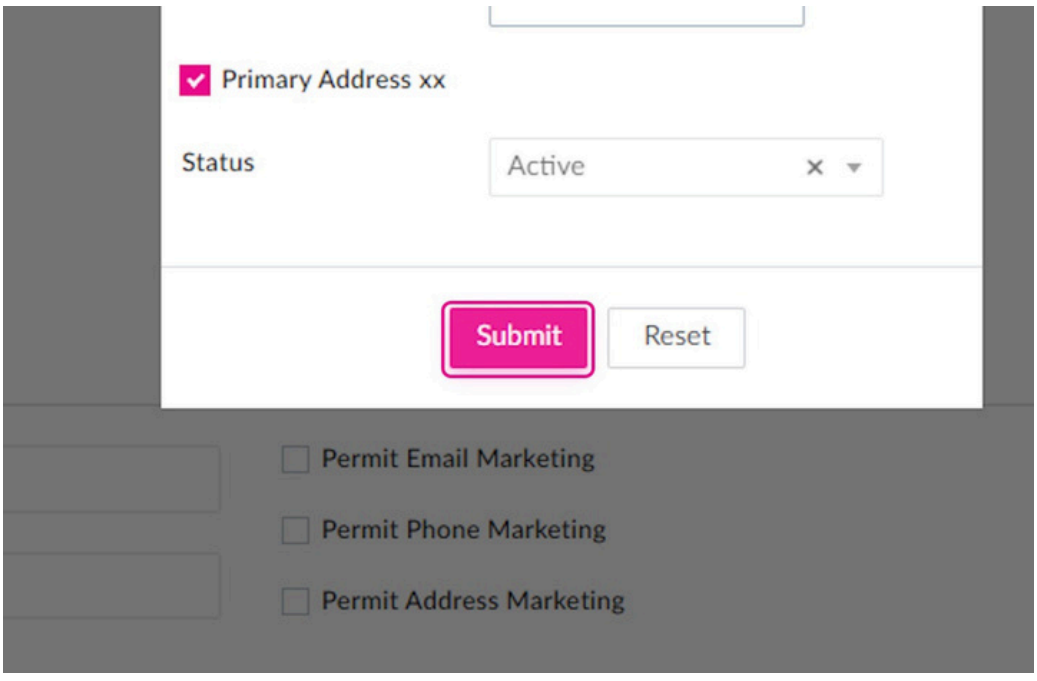
STEP 12

If the address you are adding is a primary address your client wants to receive sprint marketing to in the future, please check the "Primary Address" box.



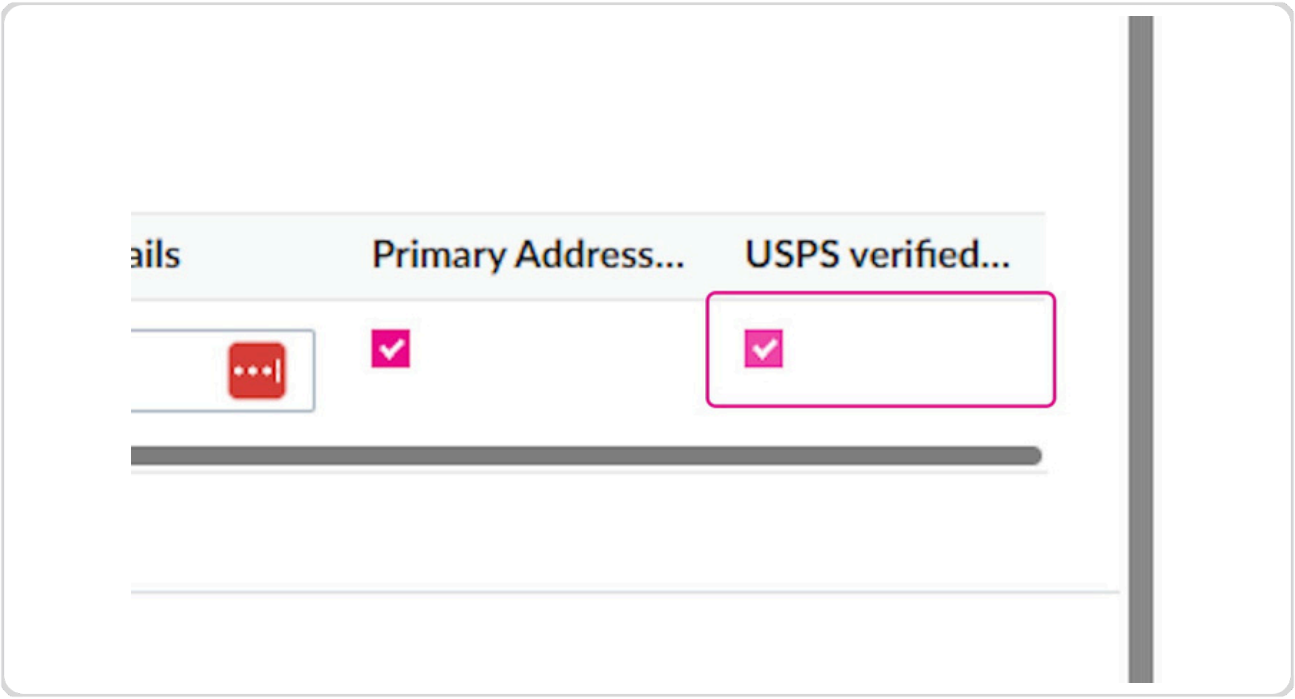
STEP 13

After all the information is filled in, please click on "Submit" to save your client's address



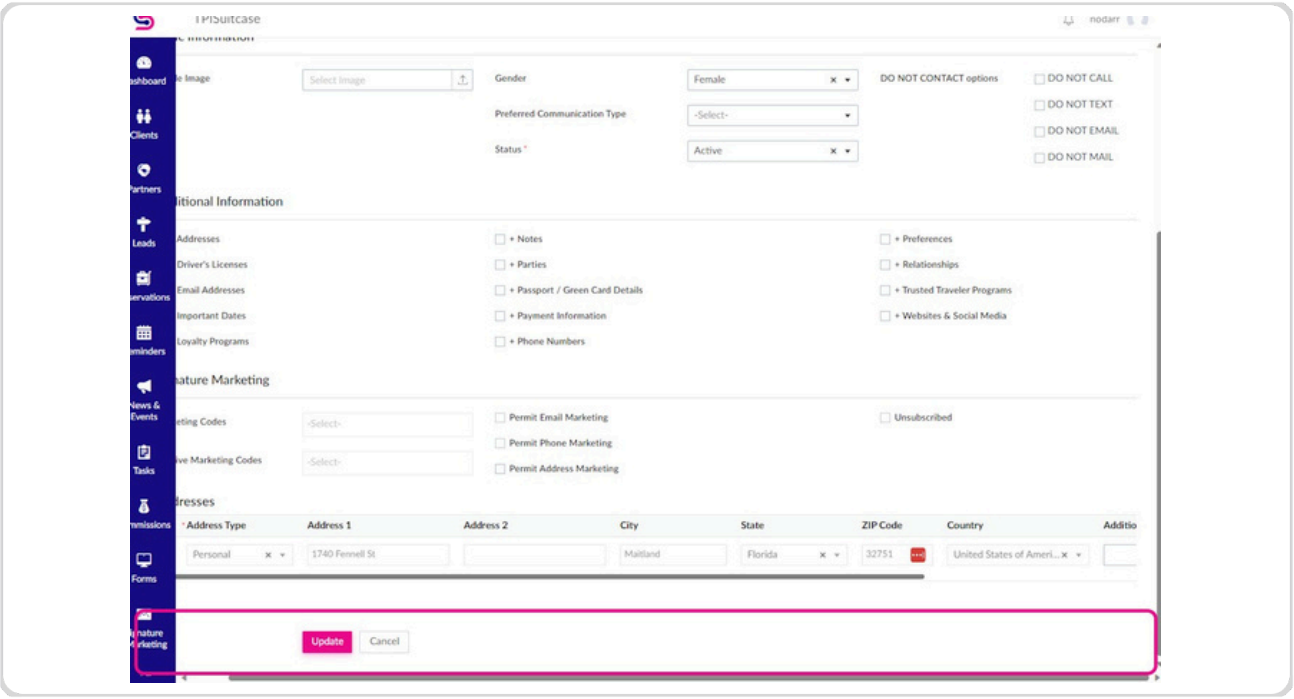
STEP 14

When you submit your client's address, it will automatically go through USPS address verification, if it passes, you will see a checkmark, if it fails the verification, you will see an error message and you can fix any mistakes that were made.



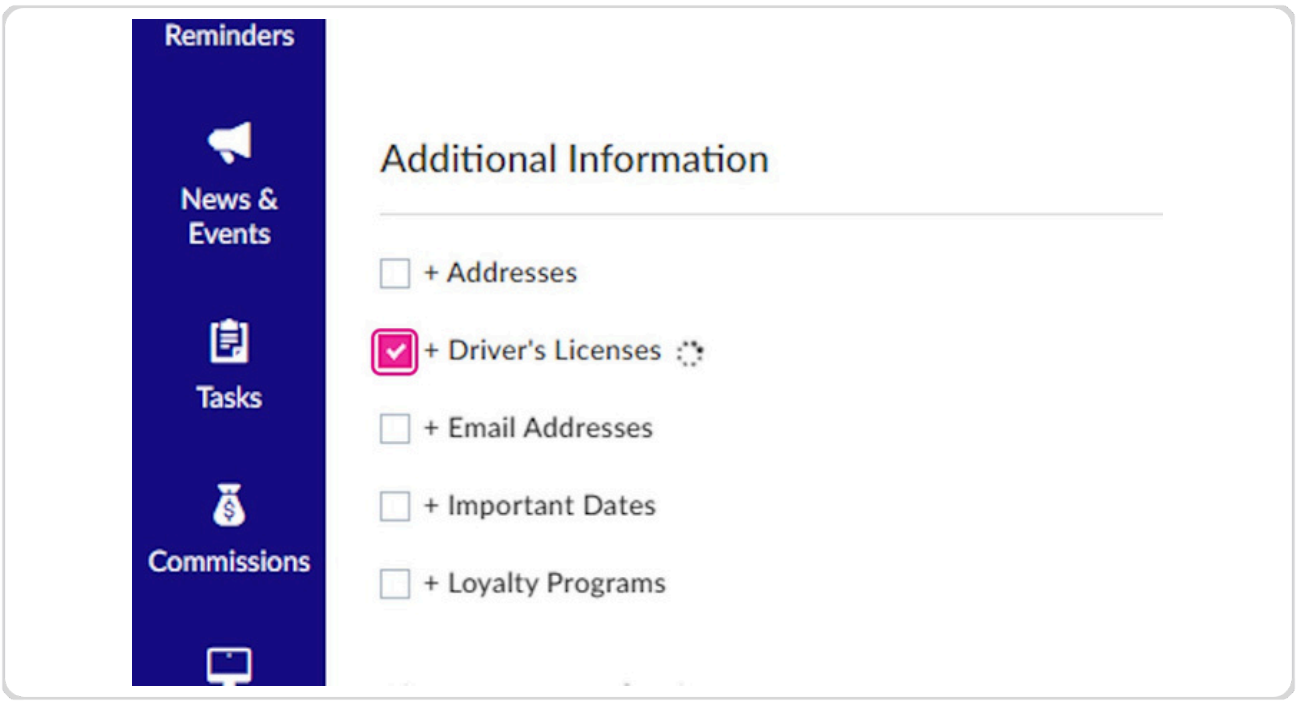
STEP 15

When you are satisfied with all the information you entered, please click on "update" to save all the changes.



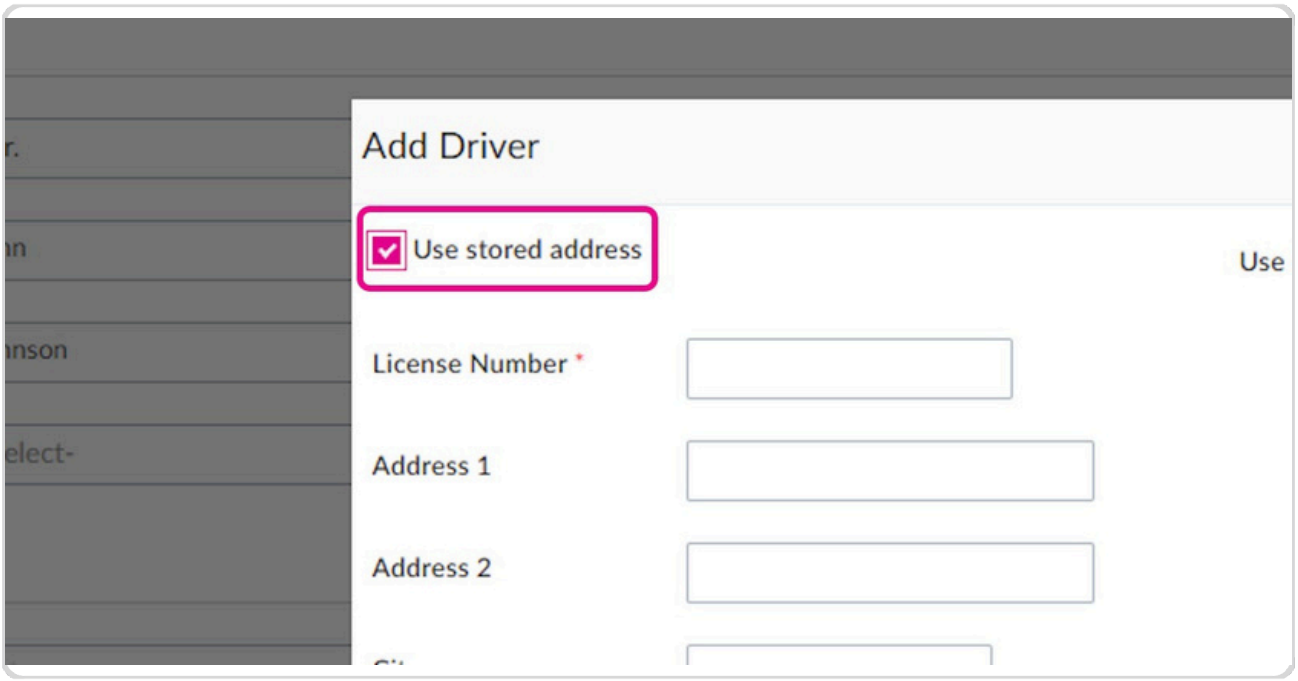
STEP 16

When entering your client's Drivers License, you can use a stored address so you don't have to enter it all over again.



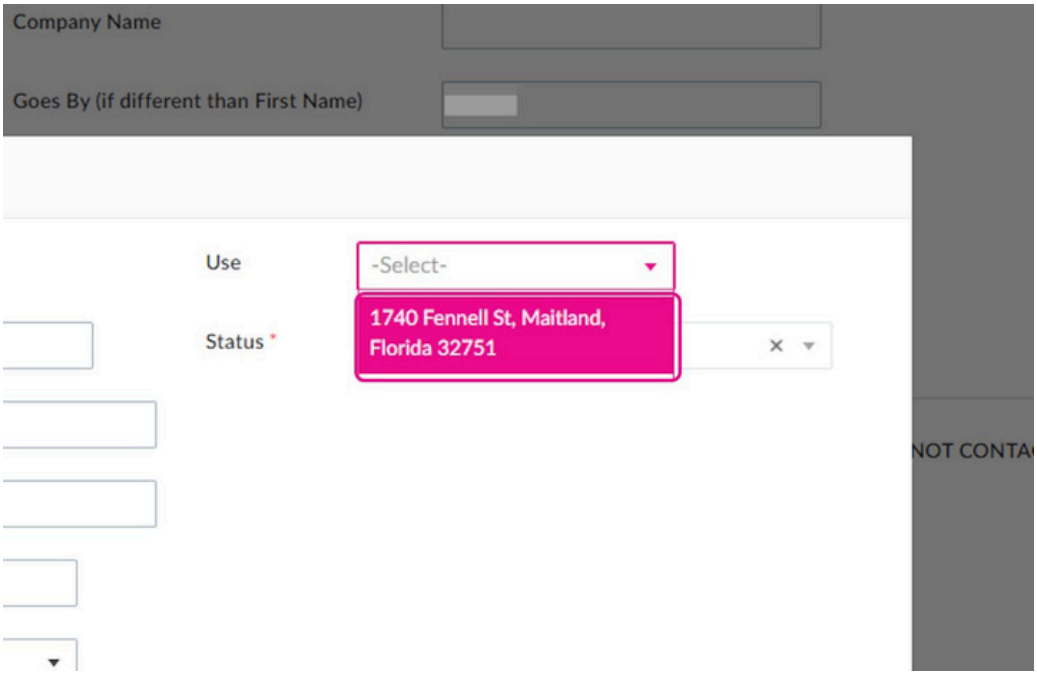
STEP 17

To use the stored address, click on the checkmark that says "Use Stored Address"



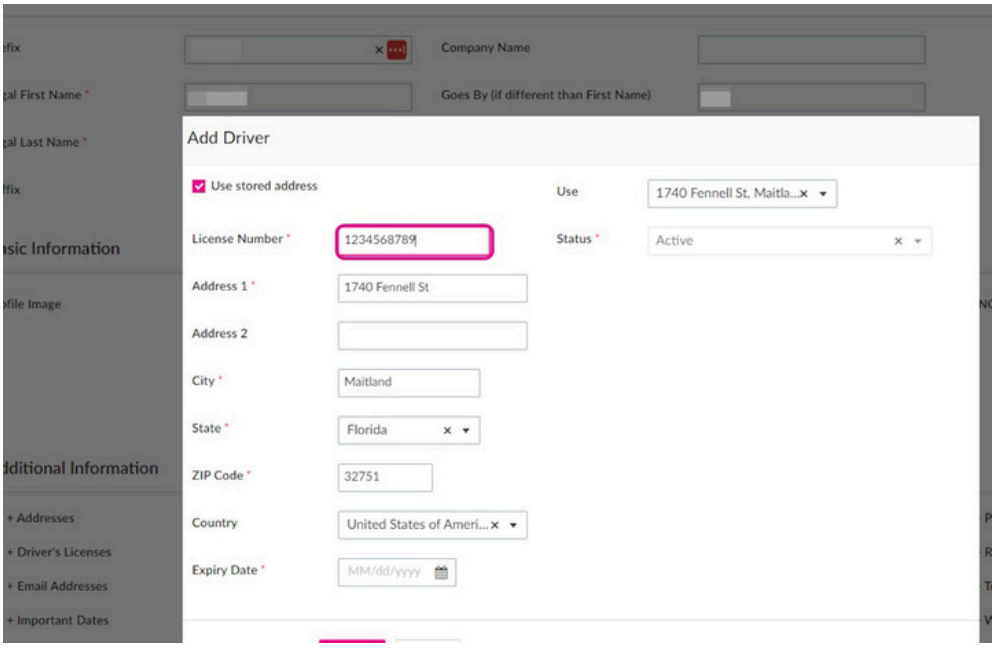
STEP 18

In the dropdown menu, select the address you want to use for the Drivers License, if you have multiple addresses stored.



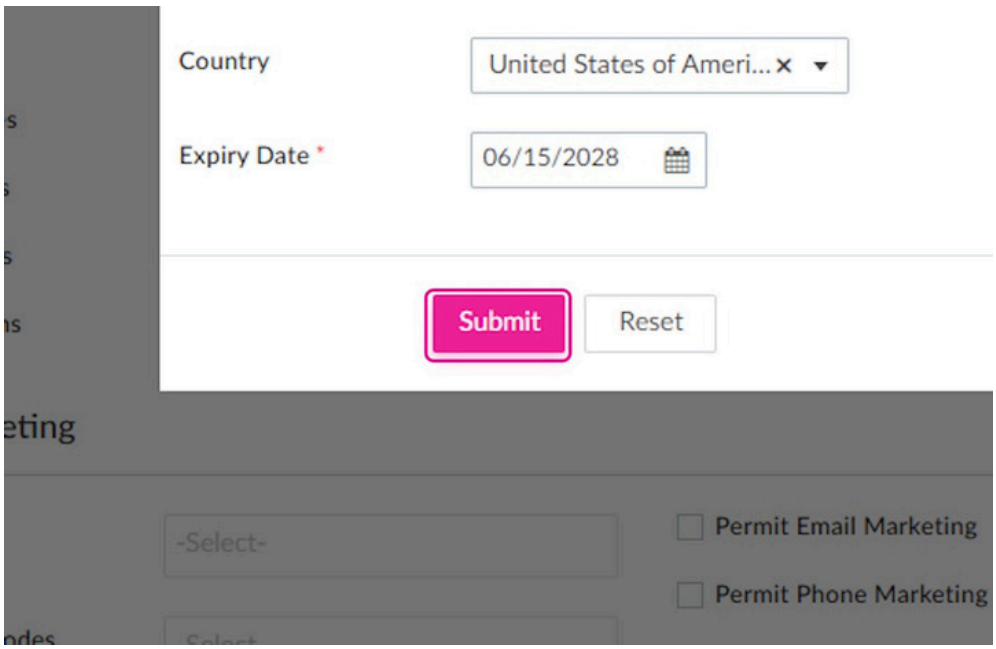
STEP 19

You just need to enter the Drivers License number and the expiration date.



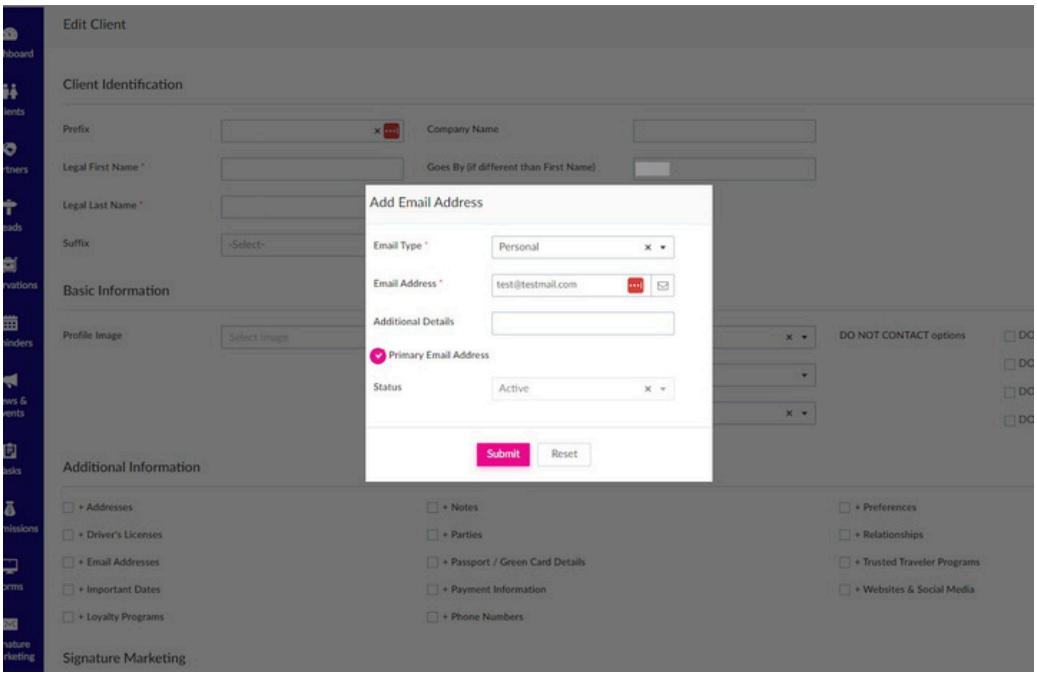
STEP 20

When you have enterd all the info, please click on "submit" to save changes.



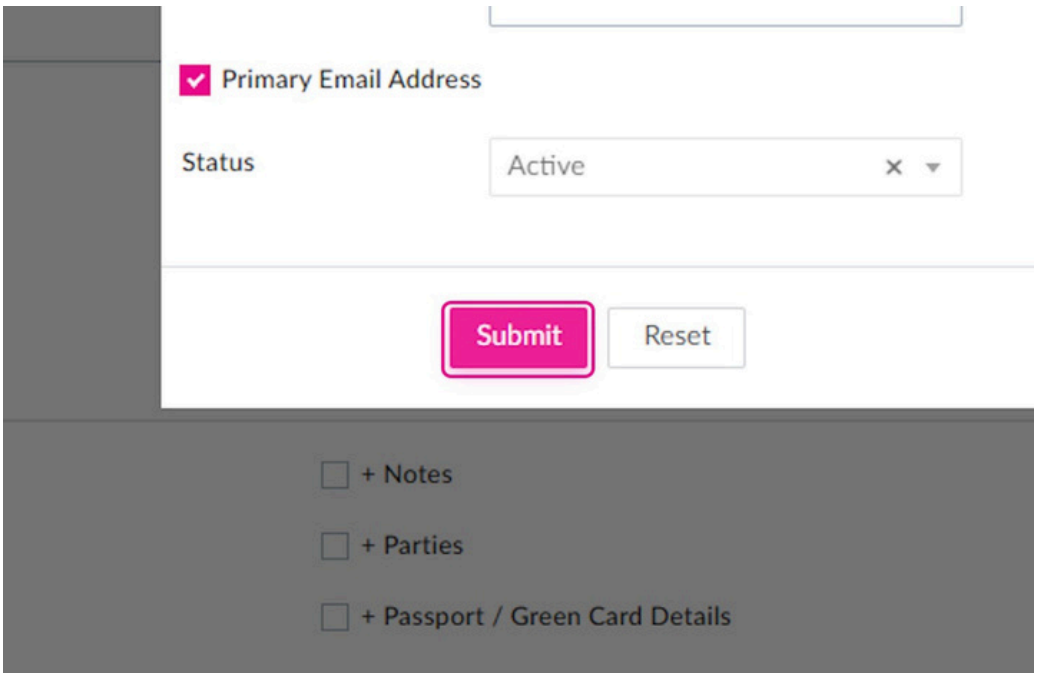
STEP 21

If your client has multiple email addresses you are entering in your CRM, please designate one of them as "primary" if you want them to receive anything generated from the system via email (i.e. webforms).



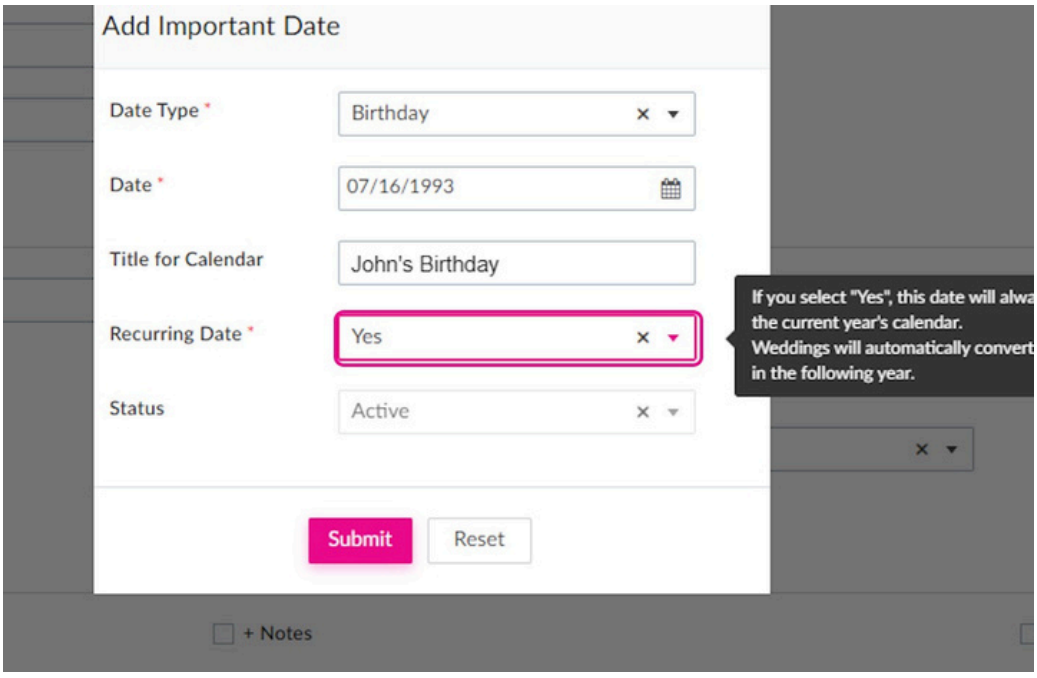
STEP 22

Click on "submit" to save the changes.



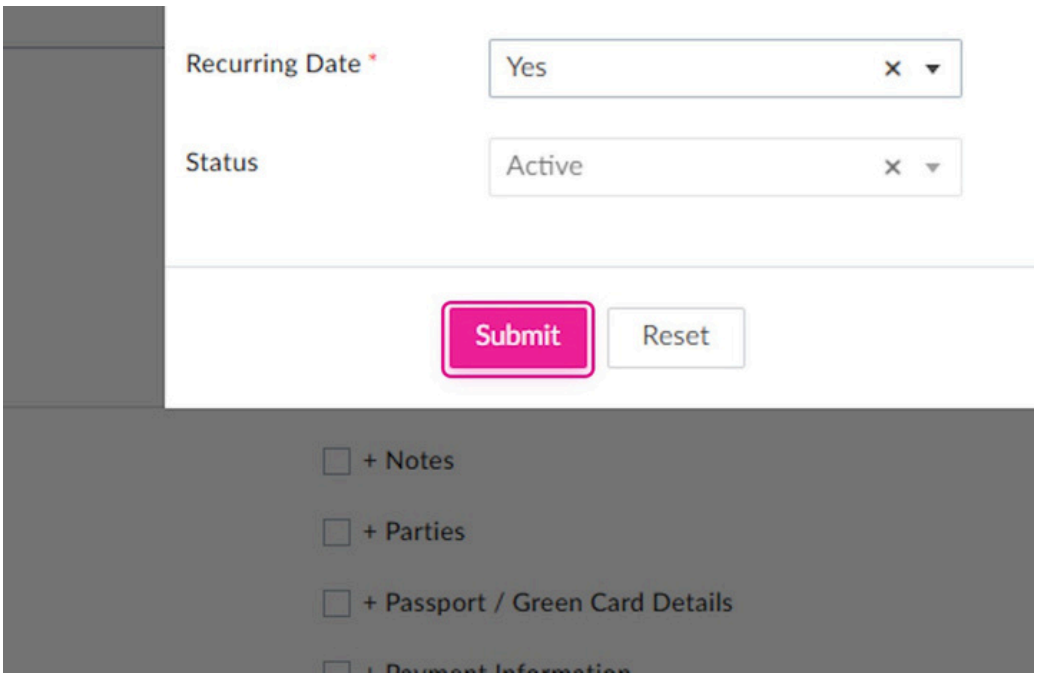
STEP 23

When adding important dates like birthdays and weddings, they will automatically be set as recurring dates. In the case of weddings, they will automatically be converted to anniversaries the following year.



STEP 24

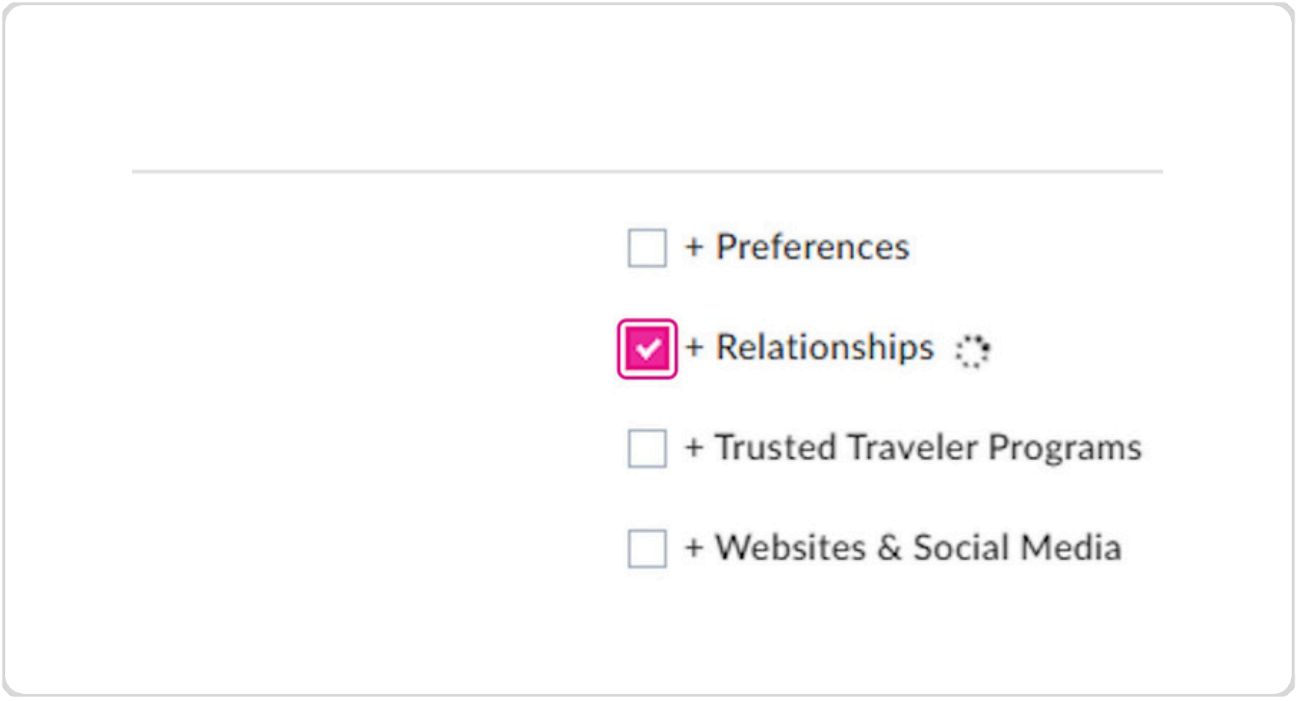
Click on Submit to save all the changes.



STEP 25

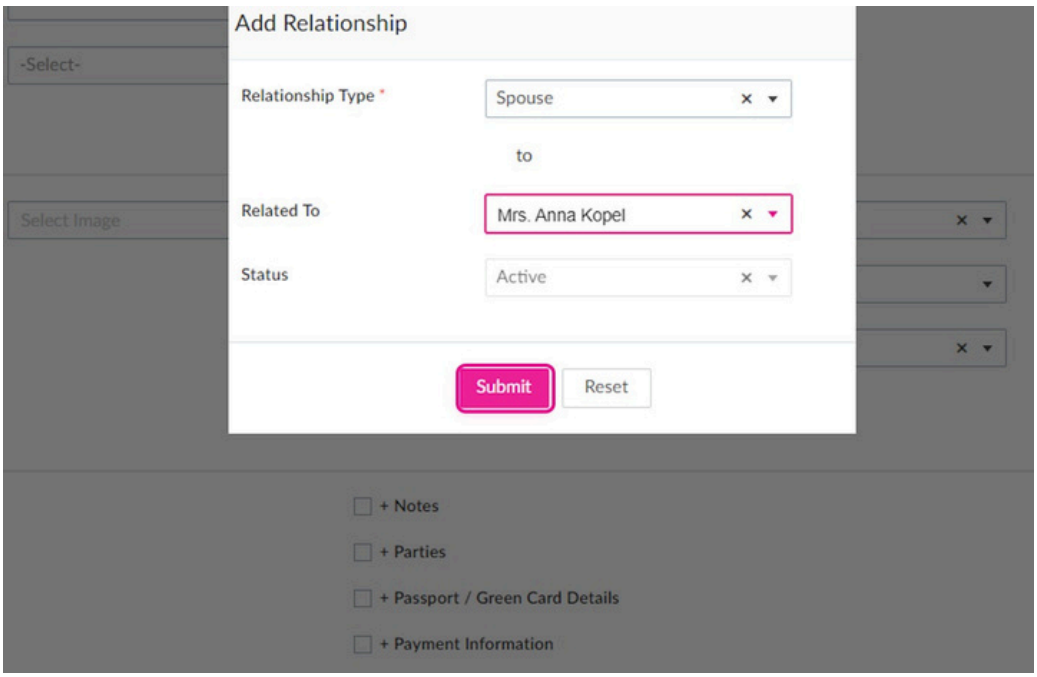
We have made changes to relationships.

Every time you add a relationship between 2 people, both people will be assigned the relationship automatically. In the example below, we have Samantha, as a spouse to Louis, so Louis's profile will automatically be updated to show he is a spouse of Sam



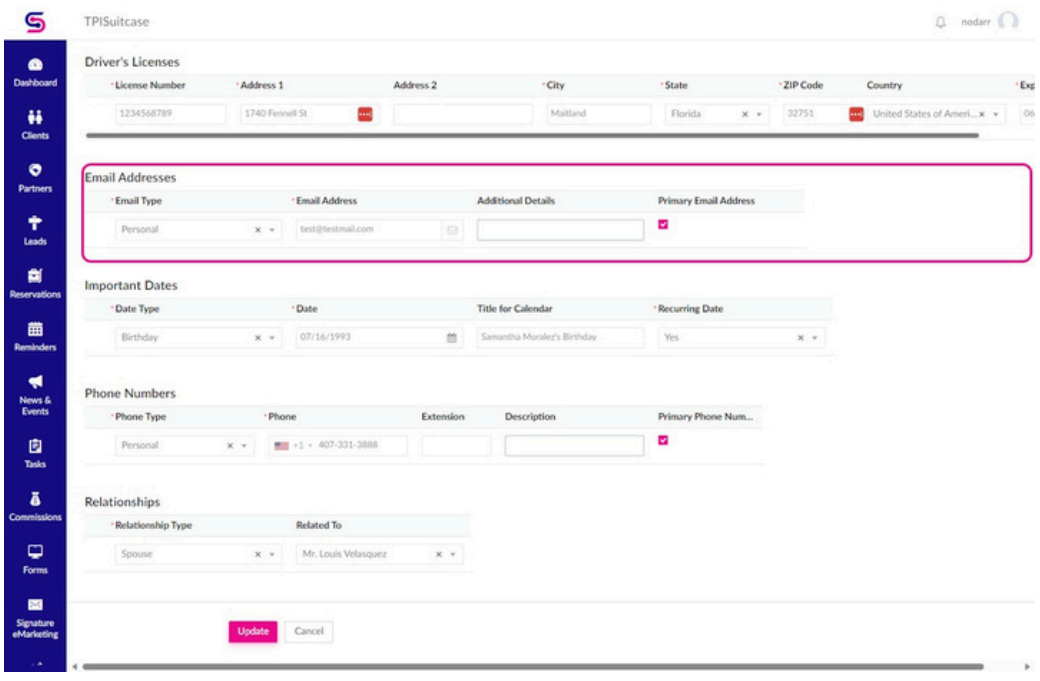
STEP 26

Example of Relationship



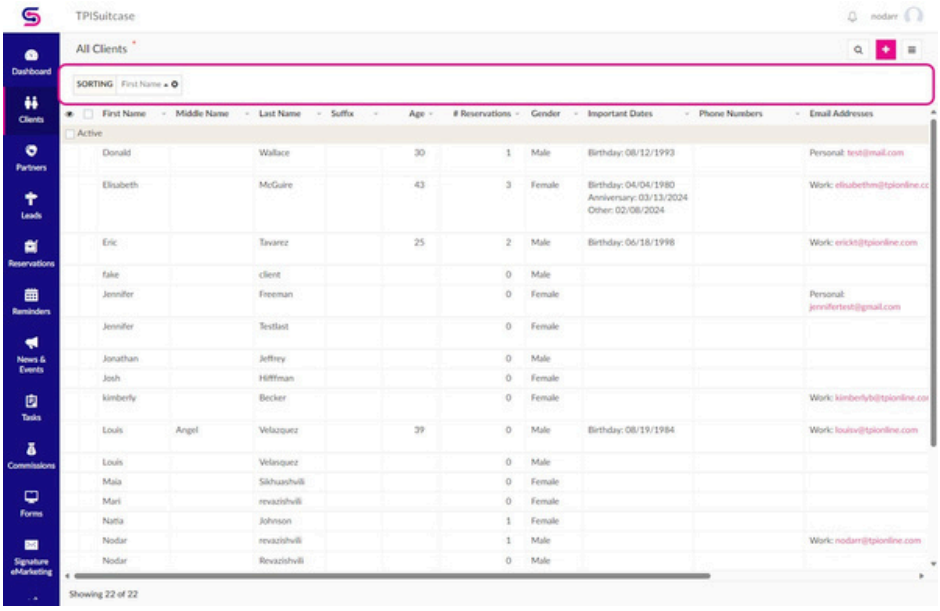
STEP 27

You will see all your client's information in their profile. You can make changes at your convenience.



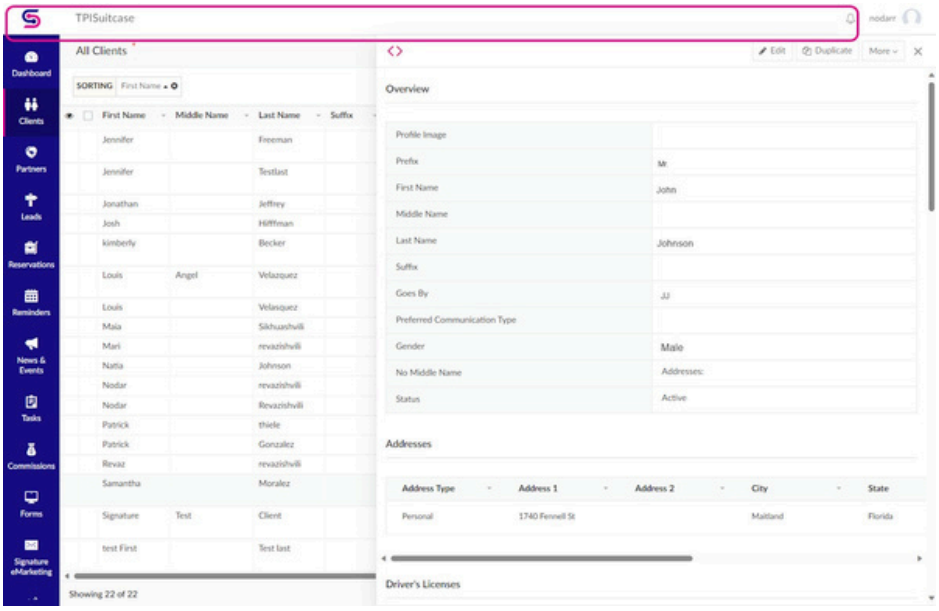
STEP 28

This is your Client List, here you can see all your clients, and you can sort and search all fields.



STEP 29

If you click anywhere on your client, you will see a "birds-eye view" of that client with all the information at your fingertips.



TPI SUiTCASE

ADDING A CLIENT

COMPLETE