TPISUITCASE

TPISUITCASE & CORE EXPLAINED:

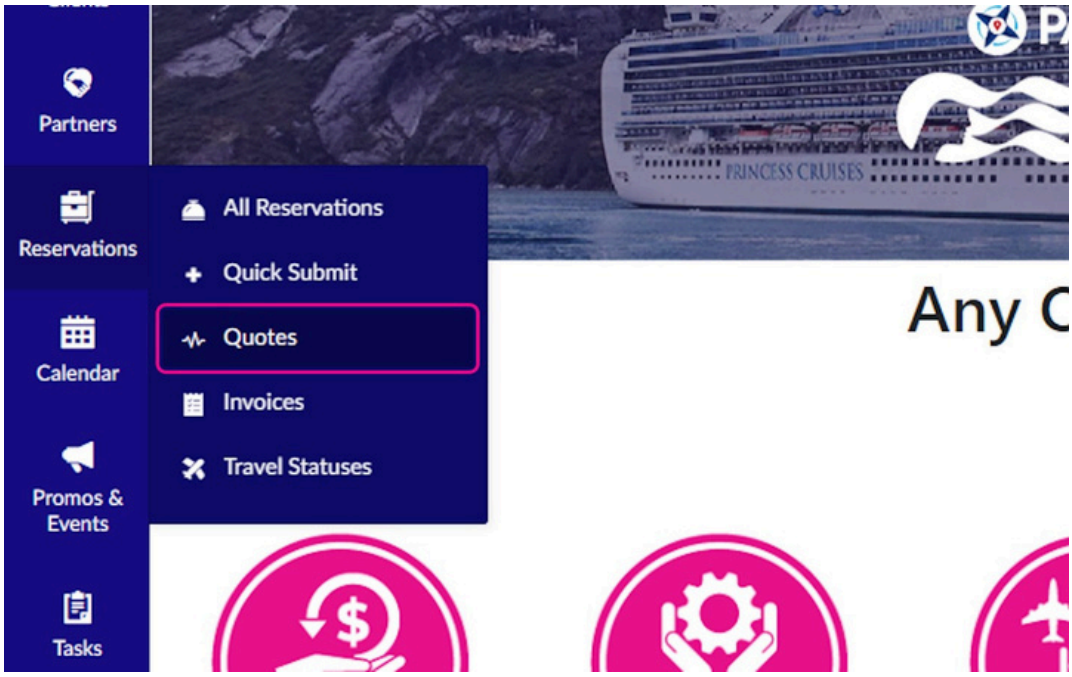
YOUR GATEWAY TO EXPERT TRAVEL PLANNING

CREATING AND EMAILING A QUOTE

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

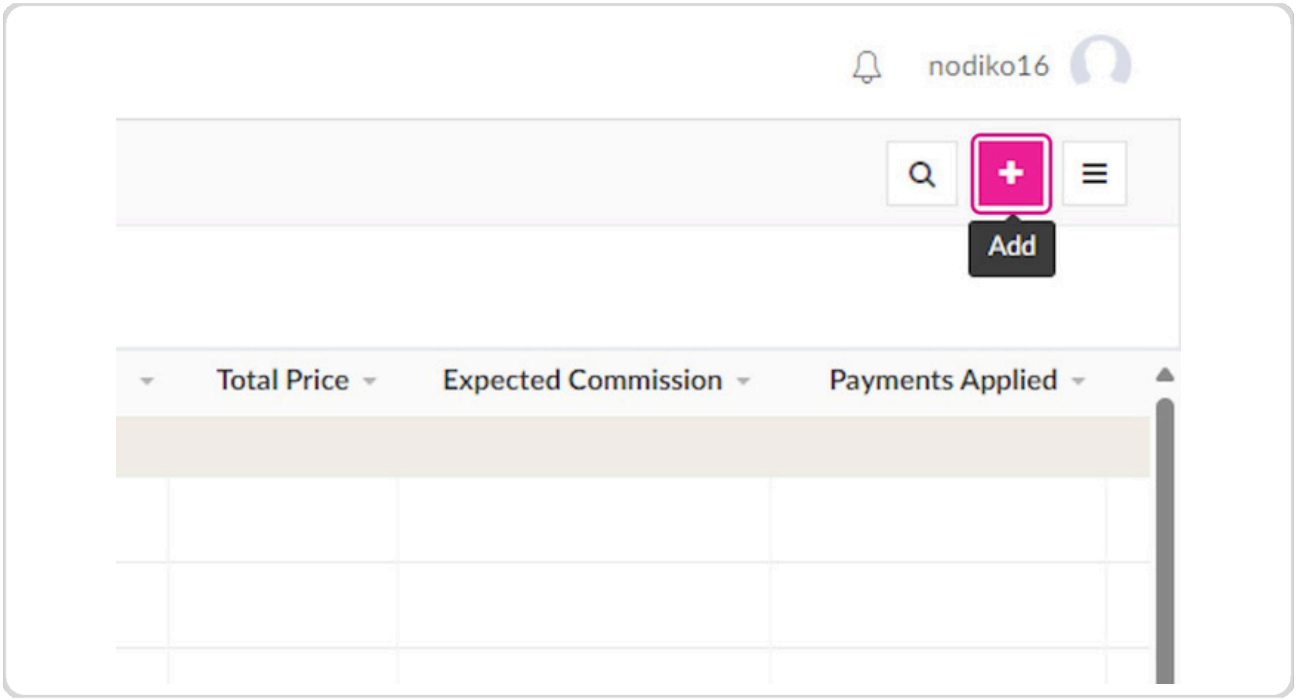
STEP 1

On the left-hand navigation bar hover over the “Reservations” section, this will display related menu items, there click on Quotes



STEP 2

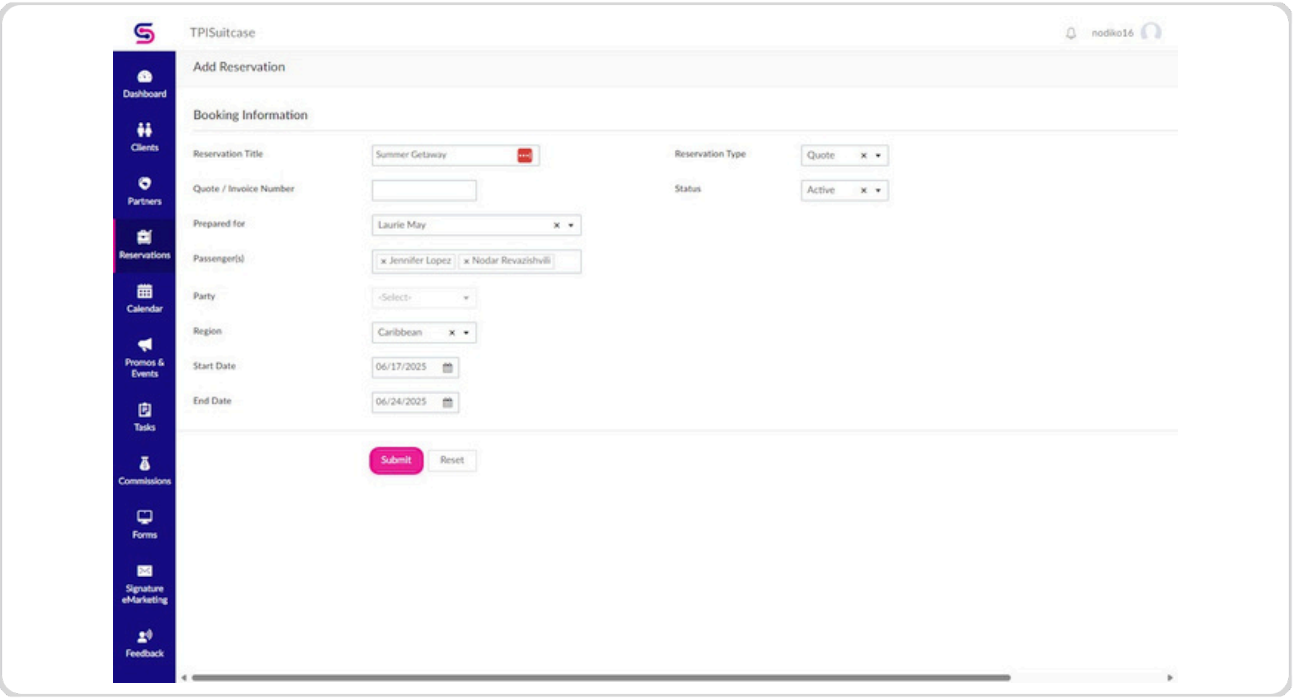
Click on the pink "+" sign in the top right corner of the page.



STEP 3

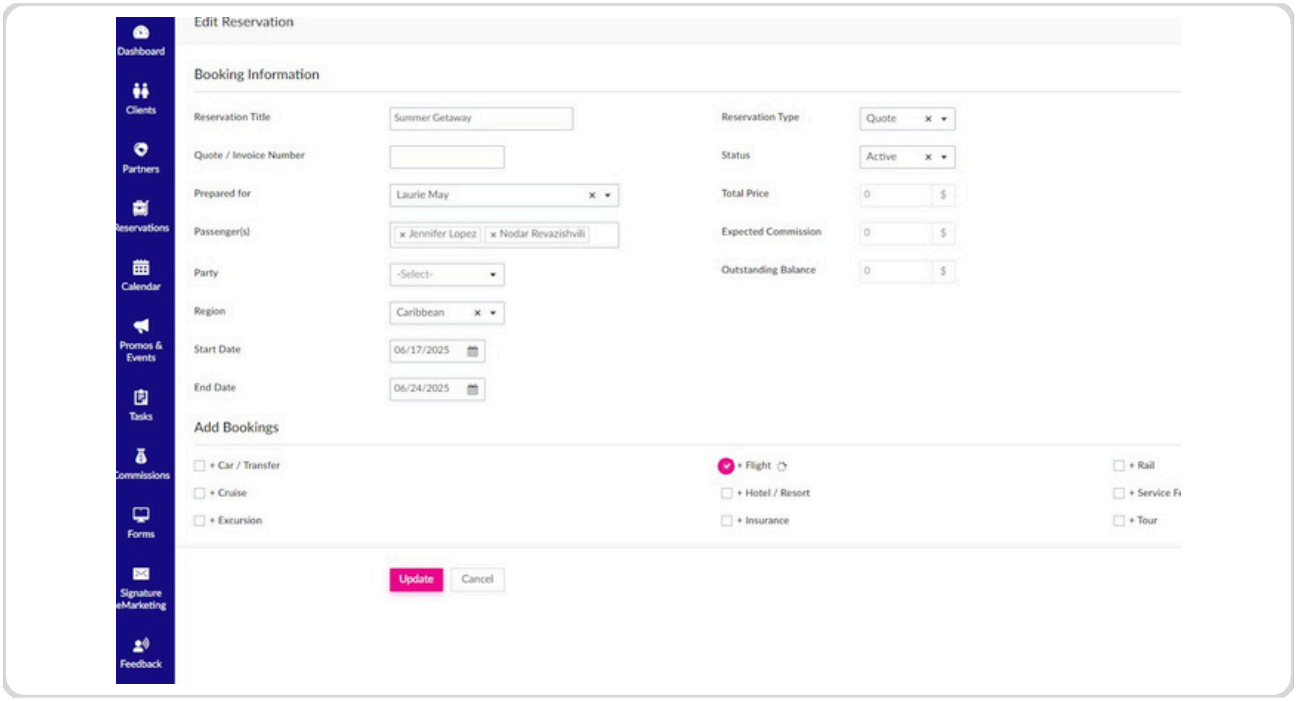
Fill in all the information and click on "Submit" to create a quote.

Make sure to have the proper start and end date. For example, if your client's cruise starts on June 18th, but they are flying in one day before, their vacation starts on June 17th.



STEP 4

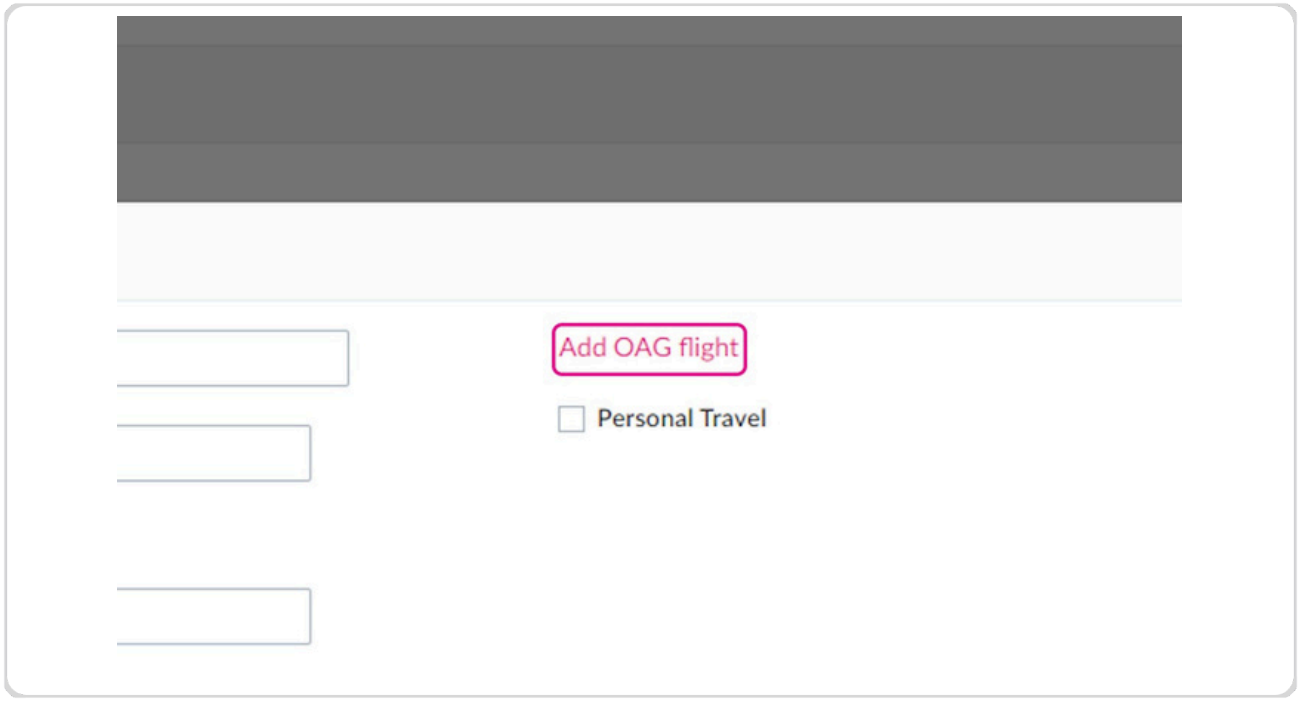
When you click on Submit, you will be redirected to a page where you can add bookings to the reservation.



STEP 5

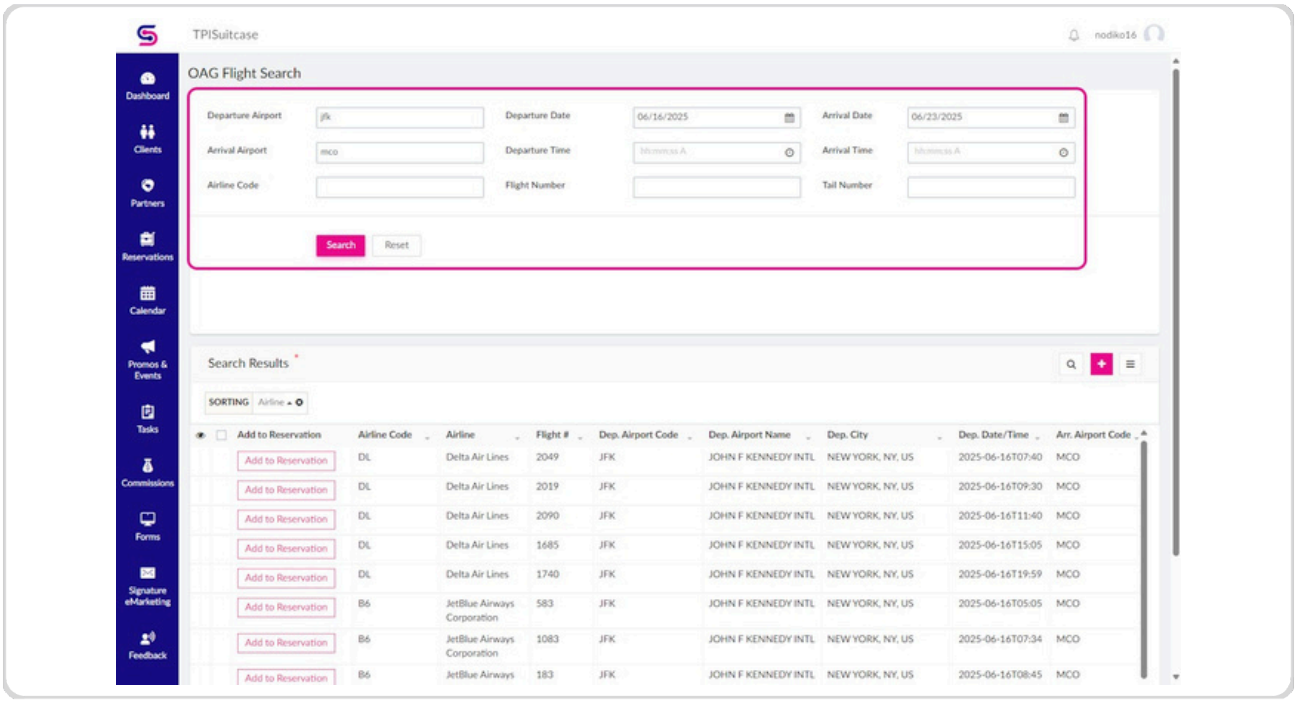
In this example, the first thing we are adding is a flight for our Clients.

We are using OAG flight search to search for flights for our clients.



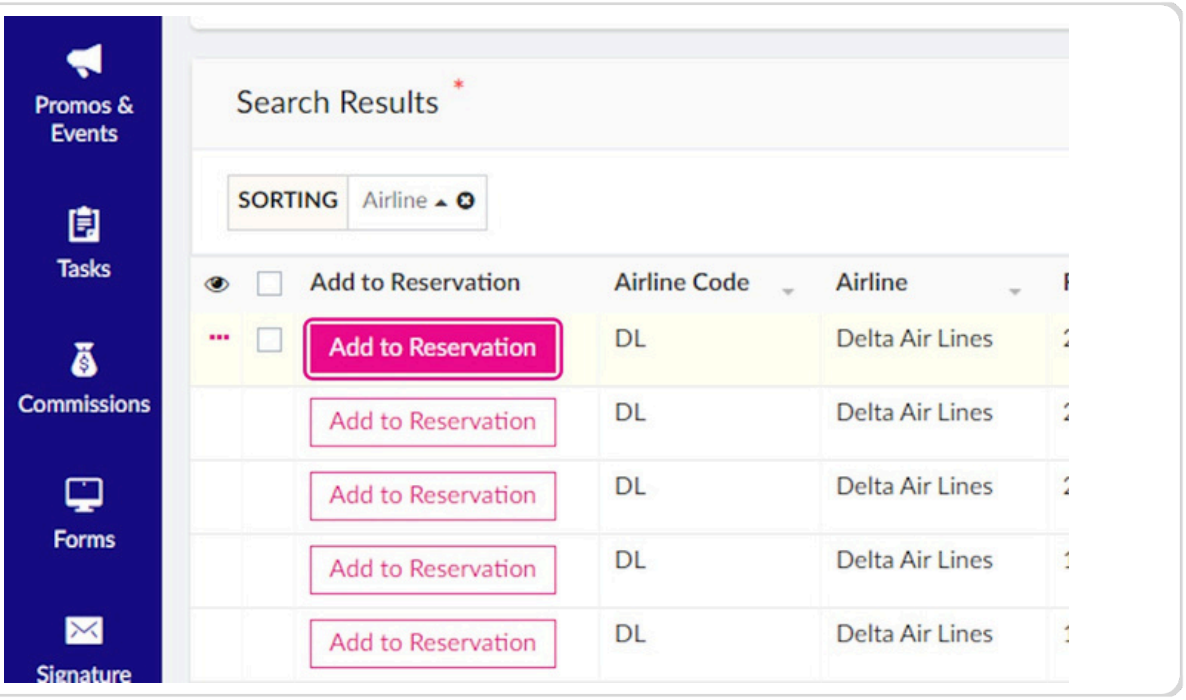
STEP 6

When you enter basic details about the flight you want to search, OAG flight will display all the results for you.



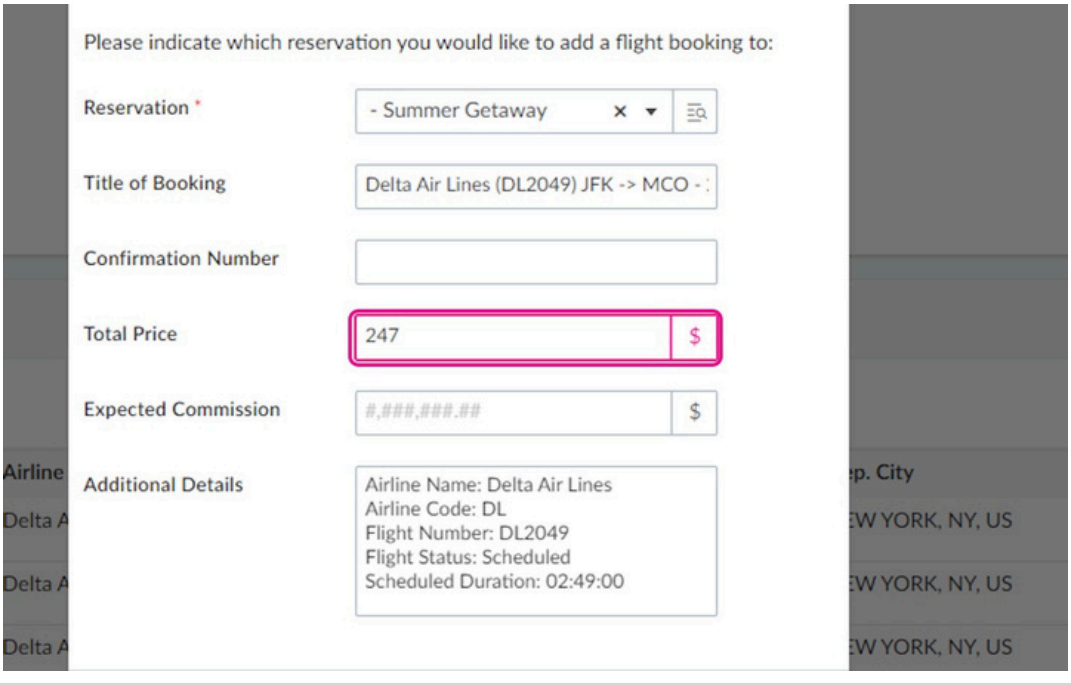
STEP 7

Select the result that best suits your needs and click on "Add to Reservation".



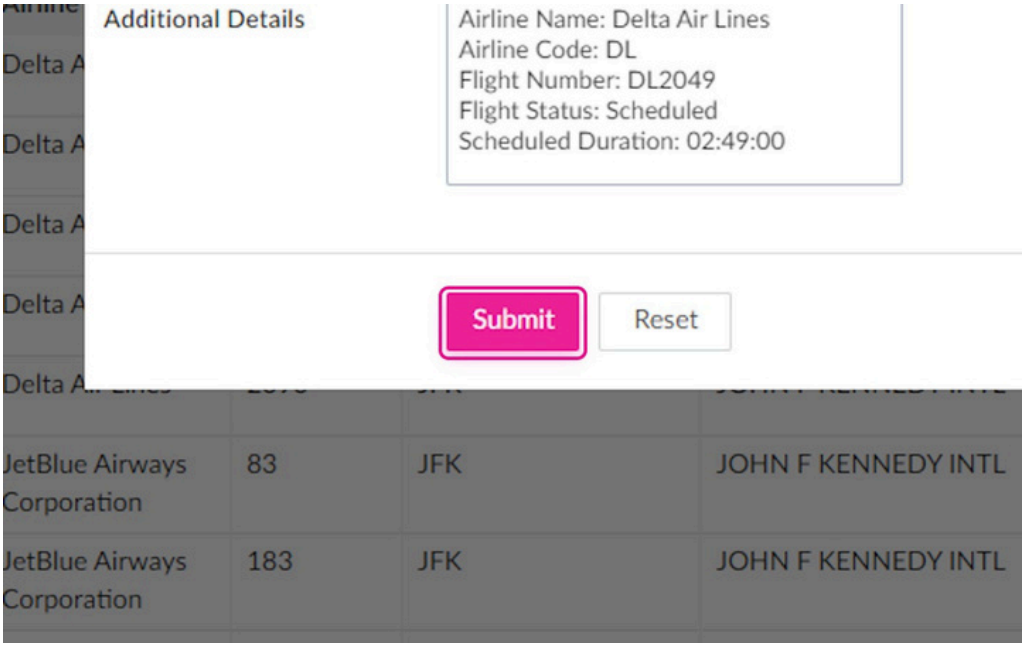
STEP 8

It is recommended that you manually add the price of the flight, since that information is not searched by OAG.



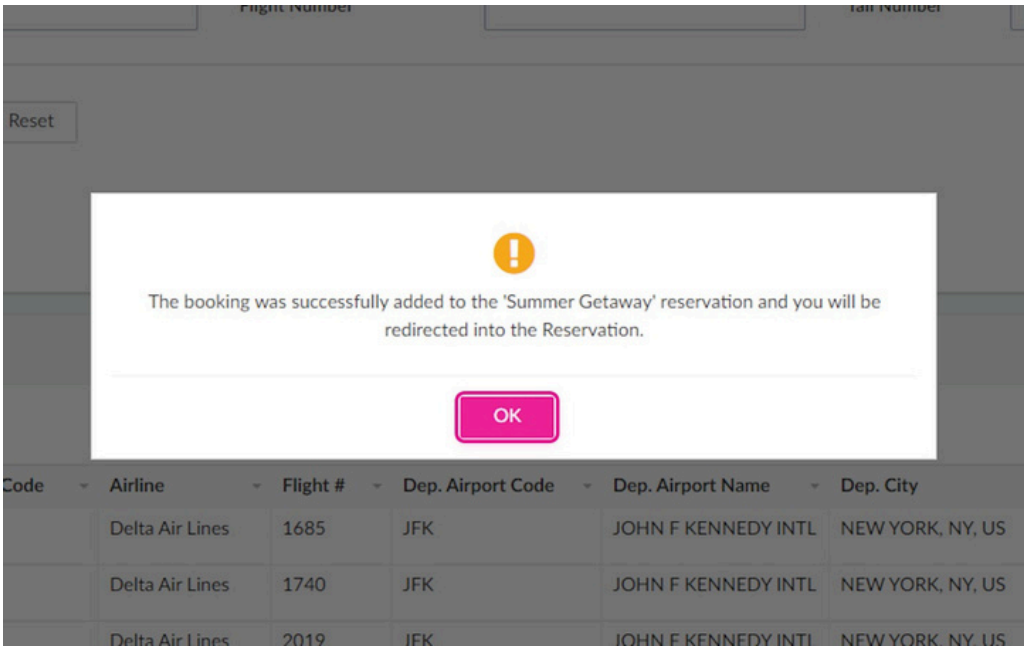
STEP 9

Click on "submit" to add the flight to your reservation.



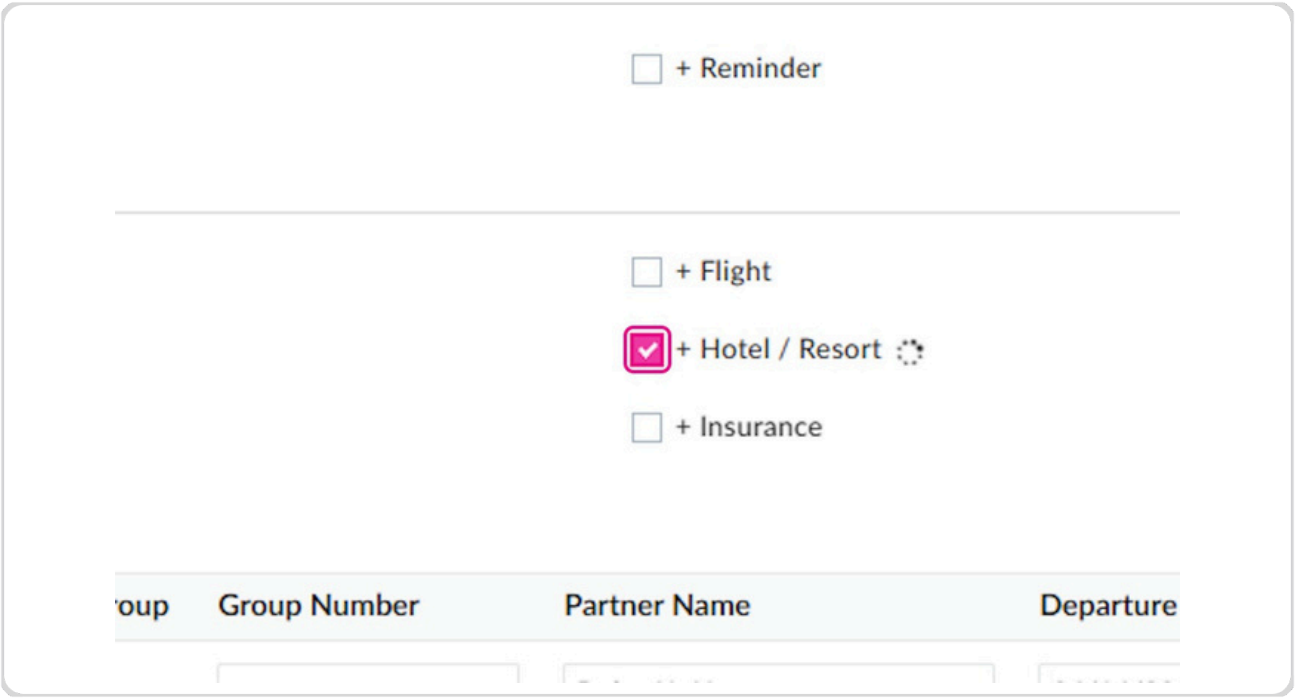
STEP 10

A confirmation screen will appear, click "OK" to continue.



STEP 11

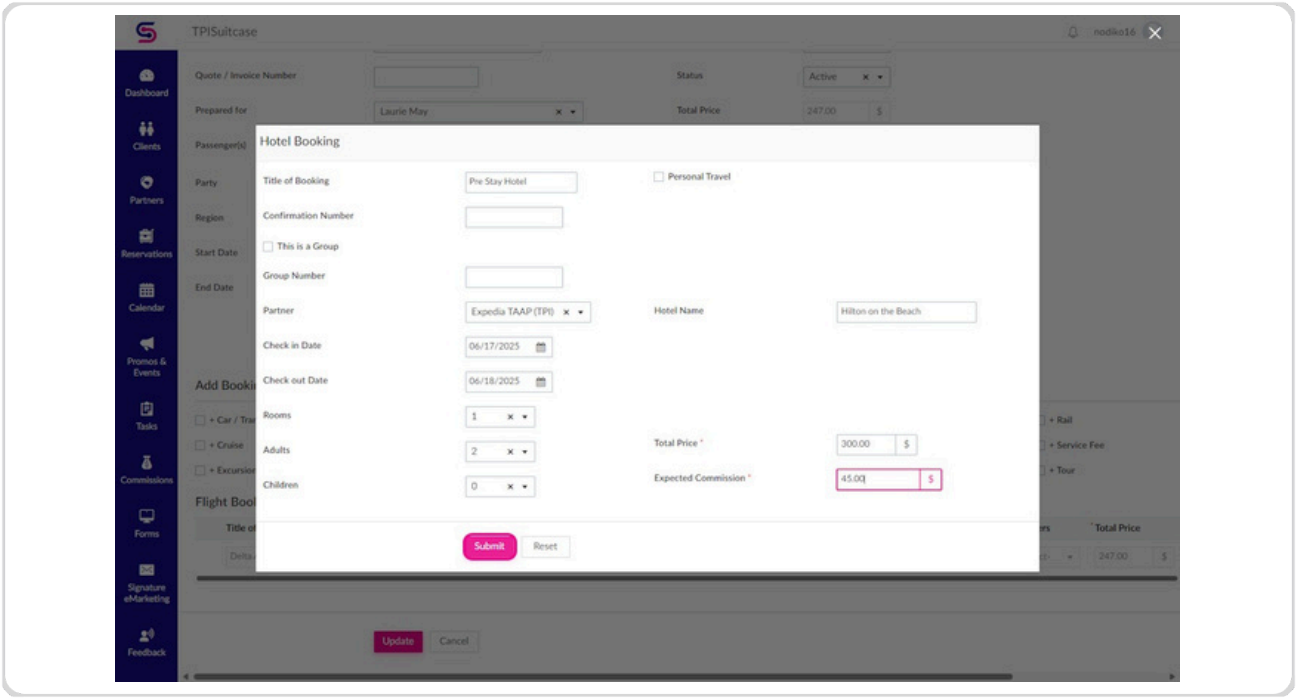
Next, we will add a Hotel/Resort. To do so, click on "+Hotel/Resort".



STEP 12

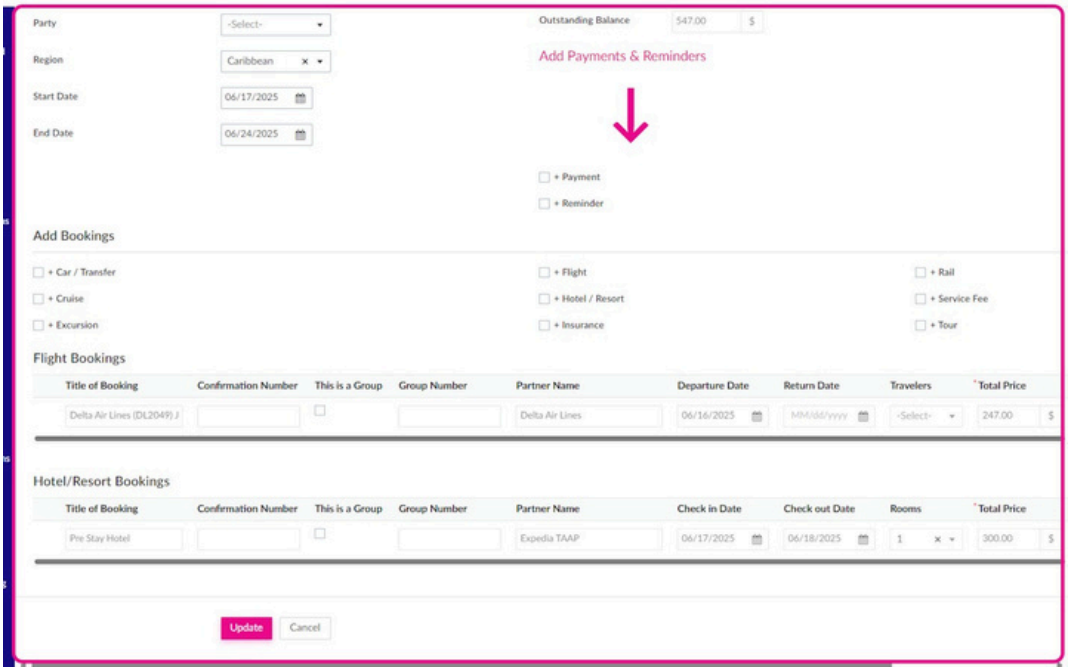
You will see a pop-up, in that pop-up window, fill in all the information you have and click on "submit" to add the hotel booking to your reservation.

Please note that the Partner Name and the Hotel Name may be different, as demonstrated in the following example: If you booked a hotel through Expedia TAAP, the Partner Name would be "Expedia TAAP," while the Hotel Name would be the specific property, such as "Hilton".



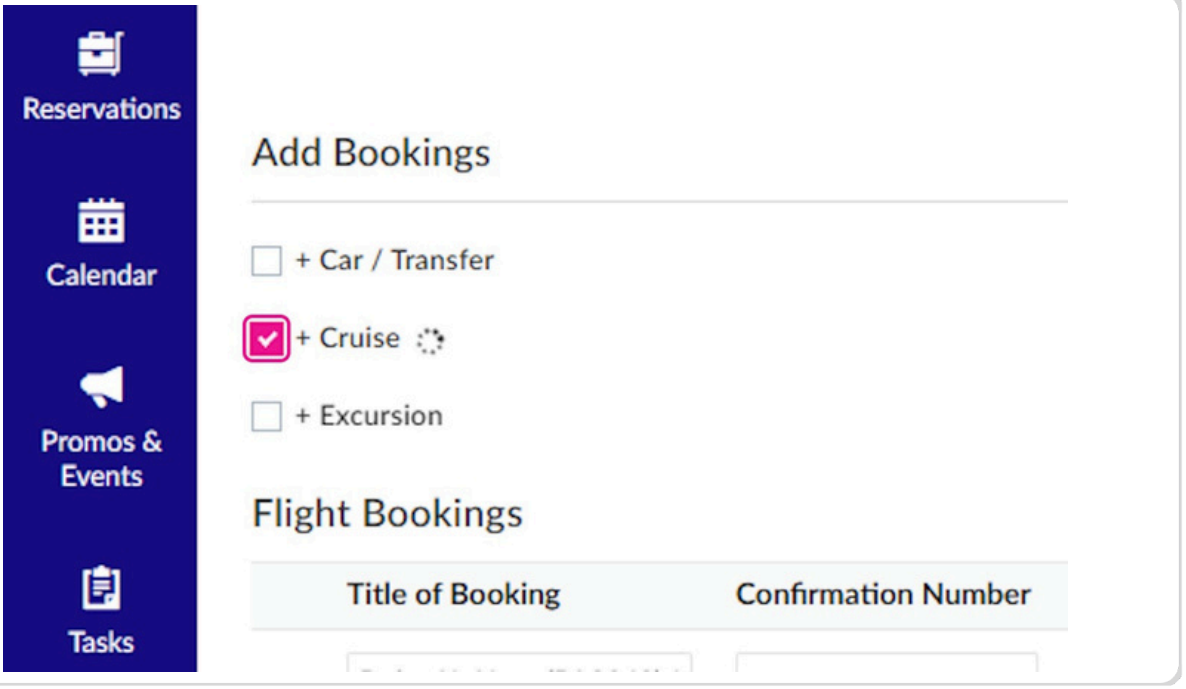
STEP 13

You can easily see all the bookings you have added to the reservation and the details for each of them.



STEP 14

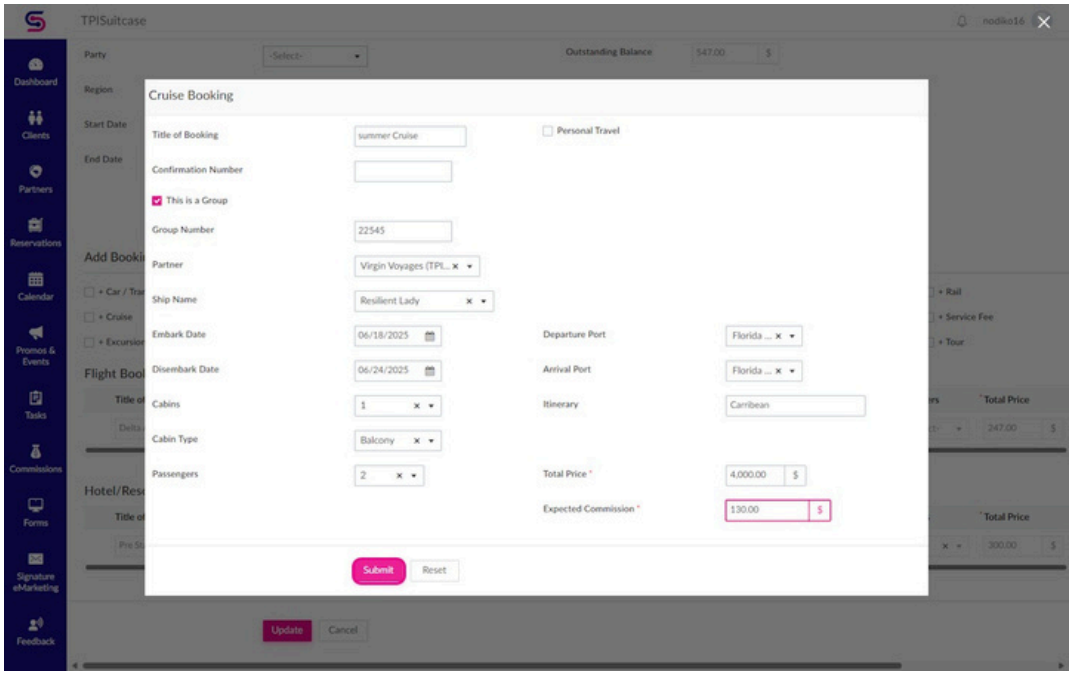
Next, let's add a Cruise, by clicking on the "+Cruise" button.



STEP 15

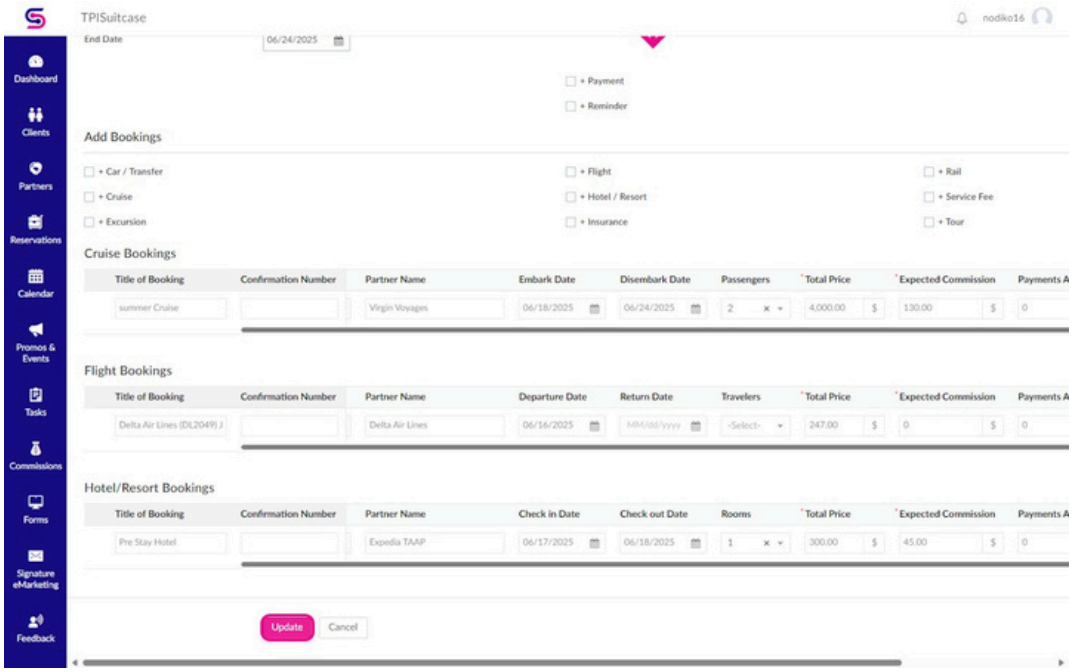
Just like before, fill in all the information and click on "Submit".

When selecting a partner, the ship names will automatically be filtered to display only those associated with that partner. We also strongly recommend that you complete the cabin type, embarkation port, and disembarkation port fields to enhance tracking and reporting accuracy.



STEP 16

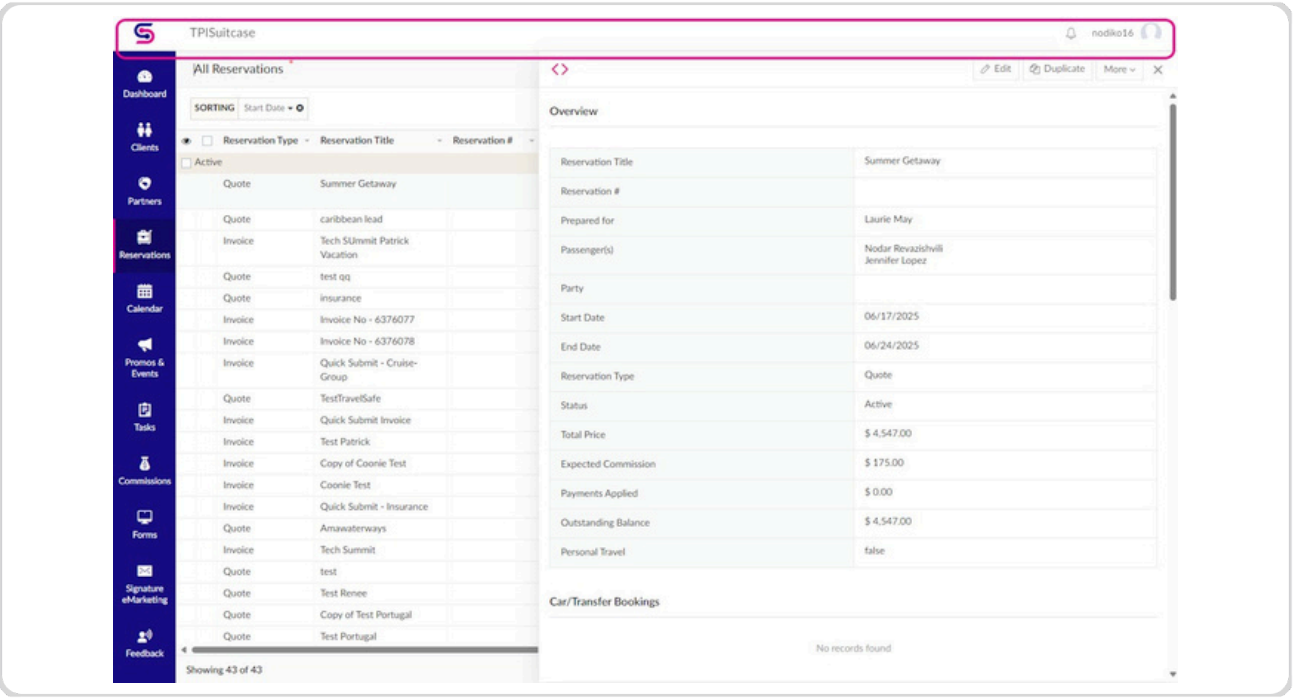
Click on Update, to save all the changes you have made.



STEP 17

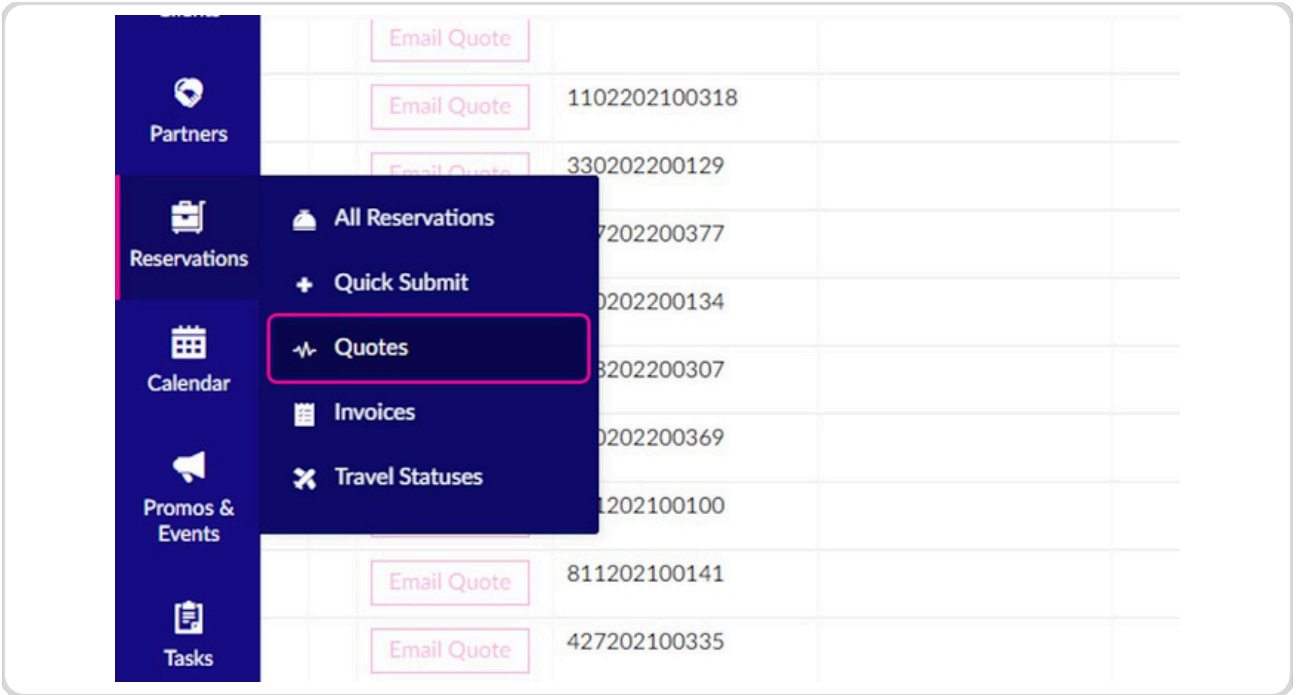
Once you click on Submit, you will see the reservation under the "All Reservations" tab.

Once you click anywhere on that reservation, you will see the "Birds-Eye View" with all the details of that reservation.



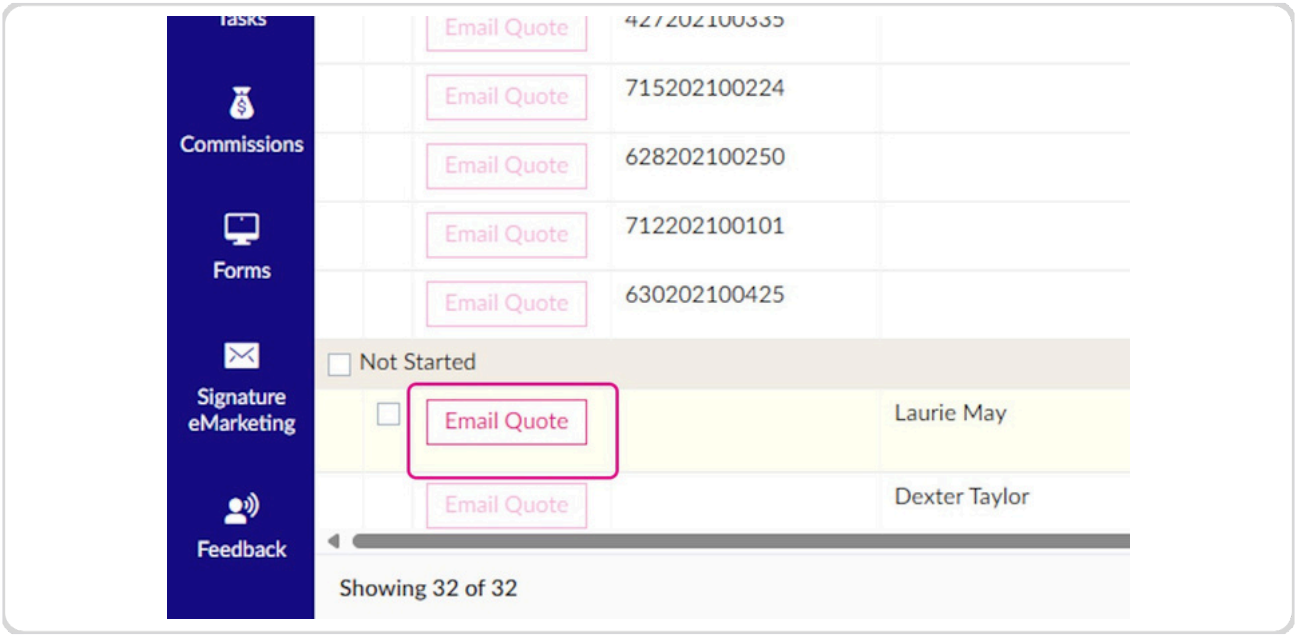
STEP 18

To send a quote, hover over "Reservations" and click on "Quotes".



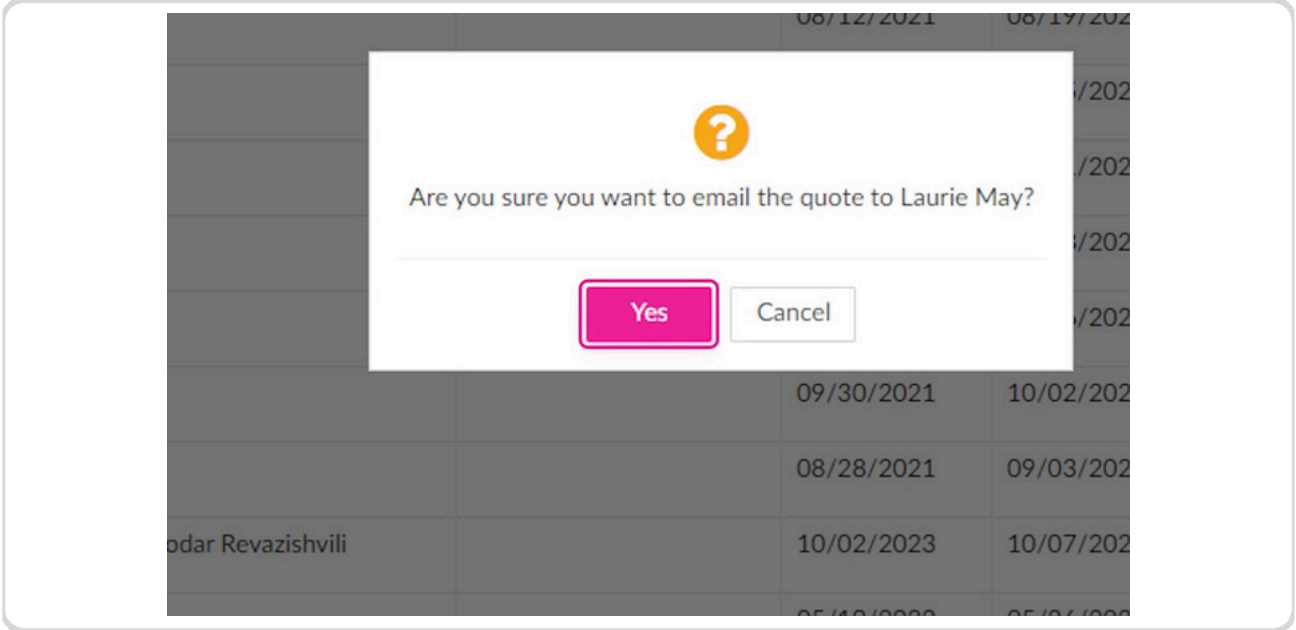
STEP 19

Once you see all the Quotes, scroll down to the "Not Started" section and click on "Email Quote".



STEP 20

You will see a pop-up window if you are sure you want to send the email. Click on "Yes".



TPI SUiTCASE

CREATING AND EMAILING A QUOTE

COMPLETE