TPISUITCASE

TPISUITCASE & CORE EXPLAINED:

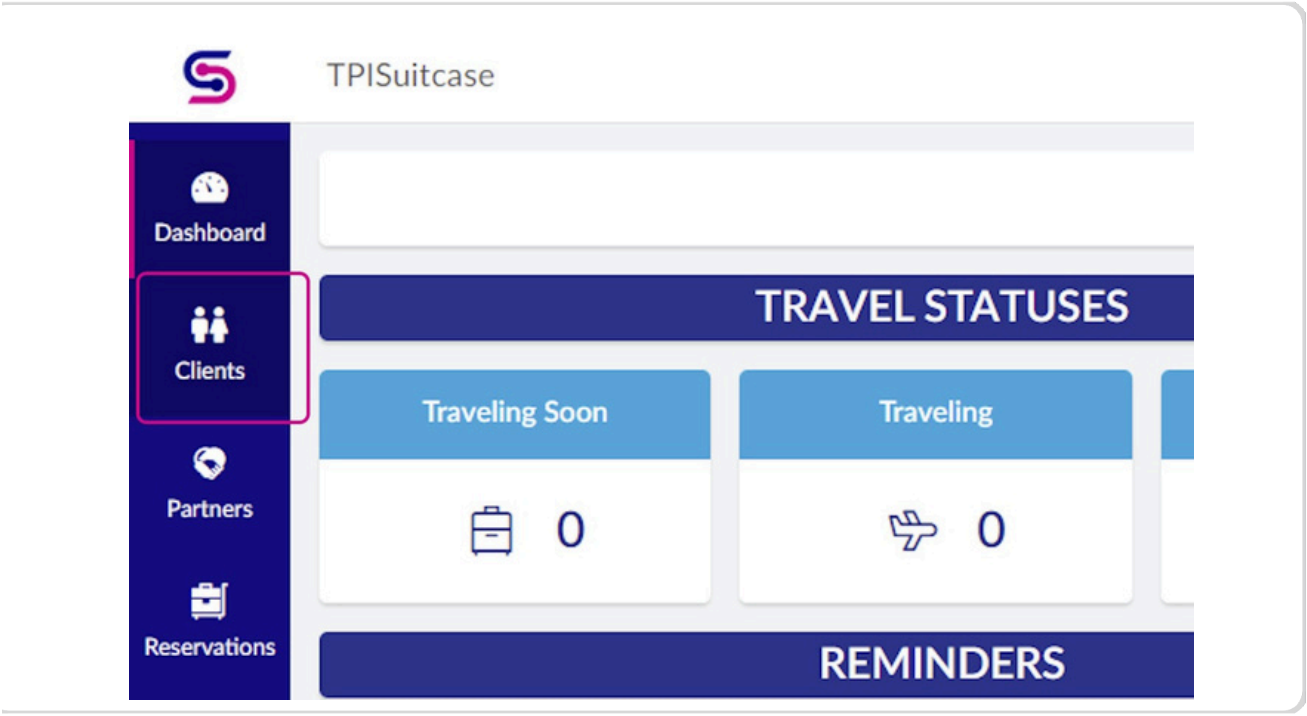
YOUR GATEWAY TO EXPERT TRAVEL PLANNING

EMAILING WEBFORMS THROUGH TPISUITCASE

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

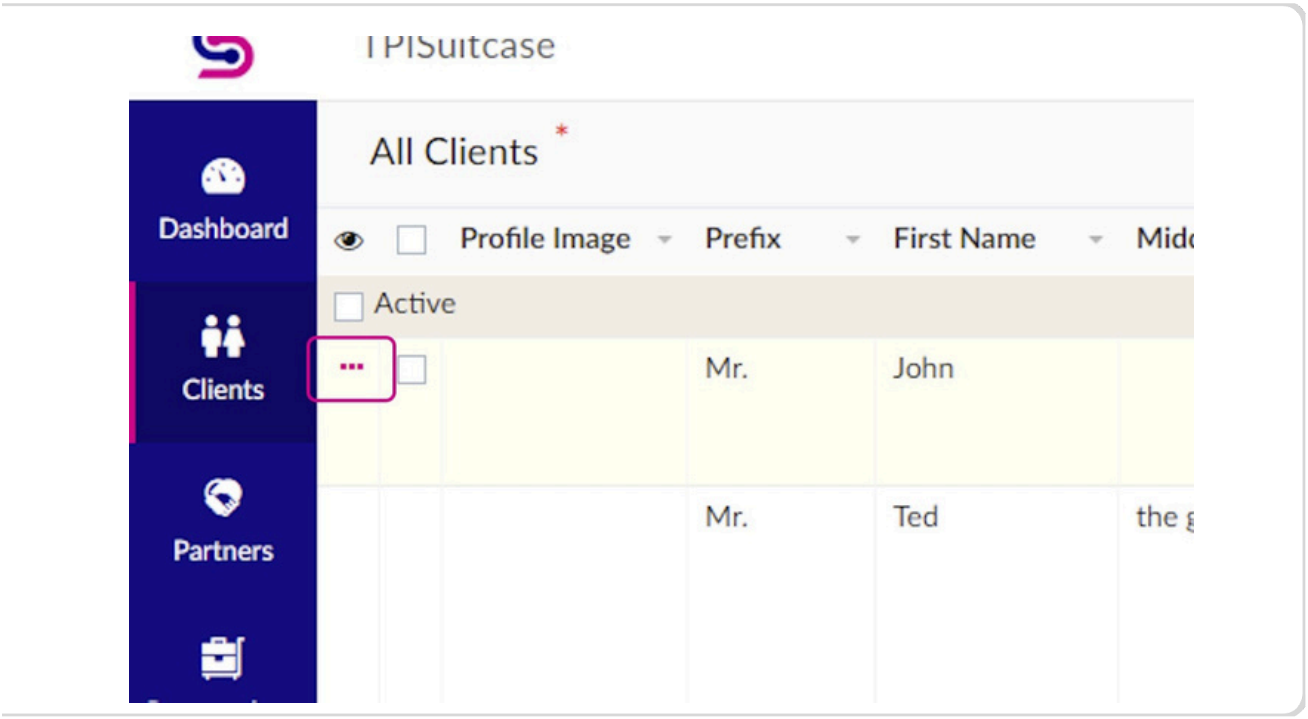
STEP 1

We have changed the way you email webforms to your clients. In TPISuitcase, you need to click on the "Clients" tab first to email webforms to your clients.



STEP 2

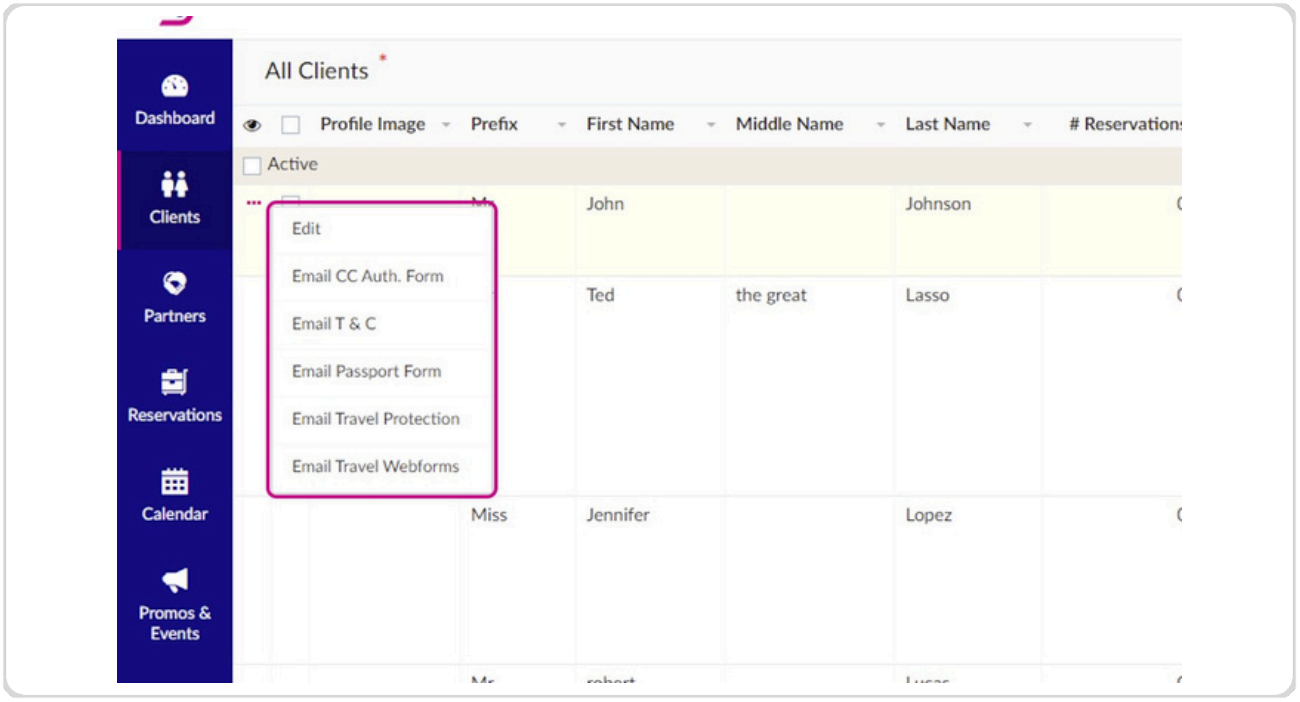
Once you are in the "Clients" tab, you need to click on the three dots on the left-hand side of the client name.



STEP 3

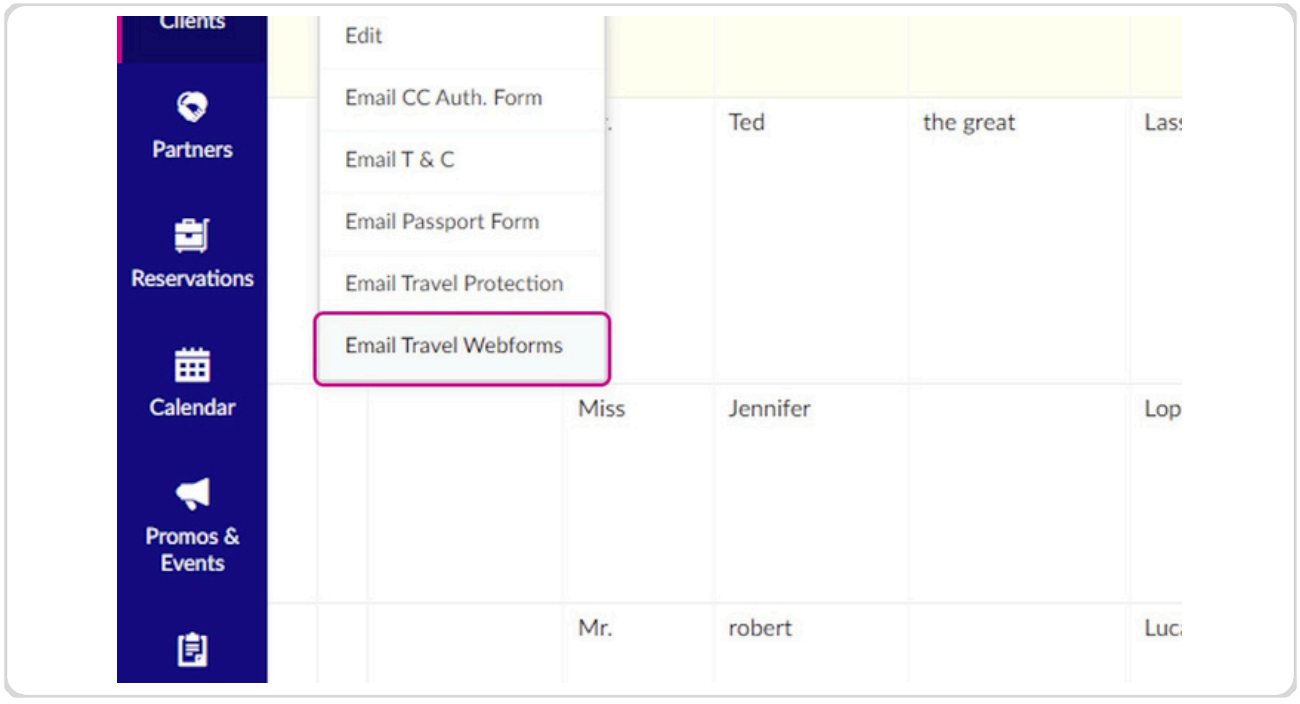
Once you click on the three dots, you will see a new pop-up, in this pop-up you can select which webforms you want to email to your client.

You will have the option to email webforms one by one, or email all travel webforms together, This option will email all webforms EXCEPT the Terms and Conditions, as this webform is not considered a travel form.



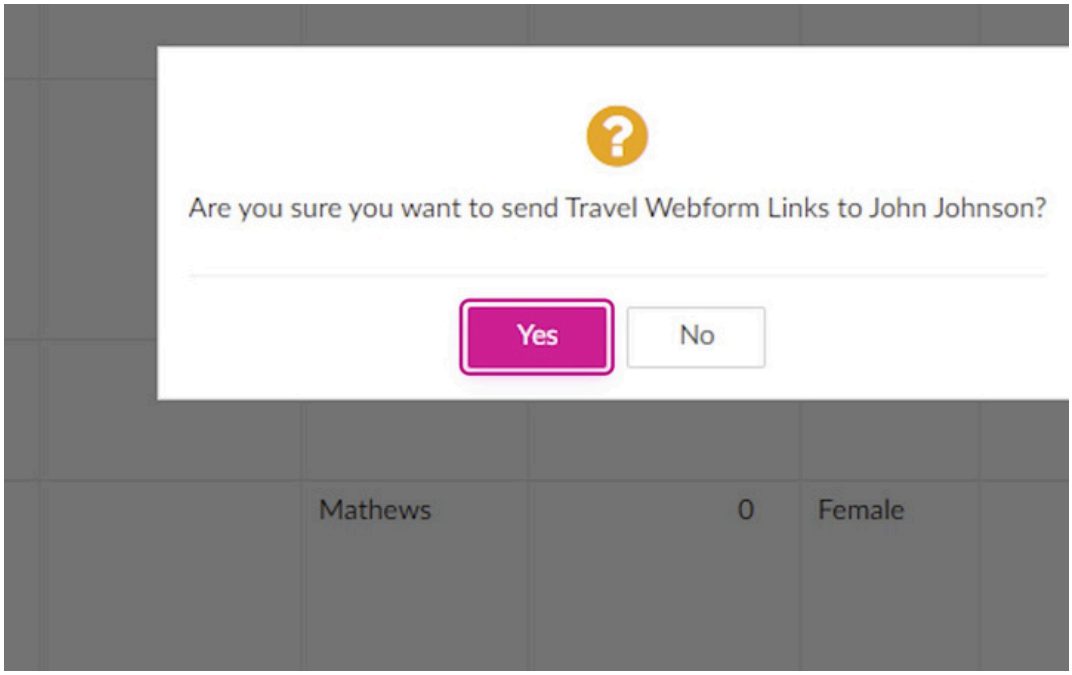
STEP 4

In this example, we will be emailing the "Travel Webforms" to our client.



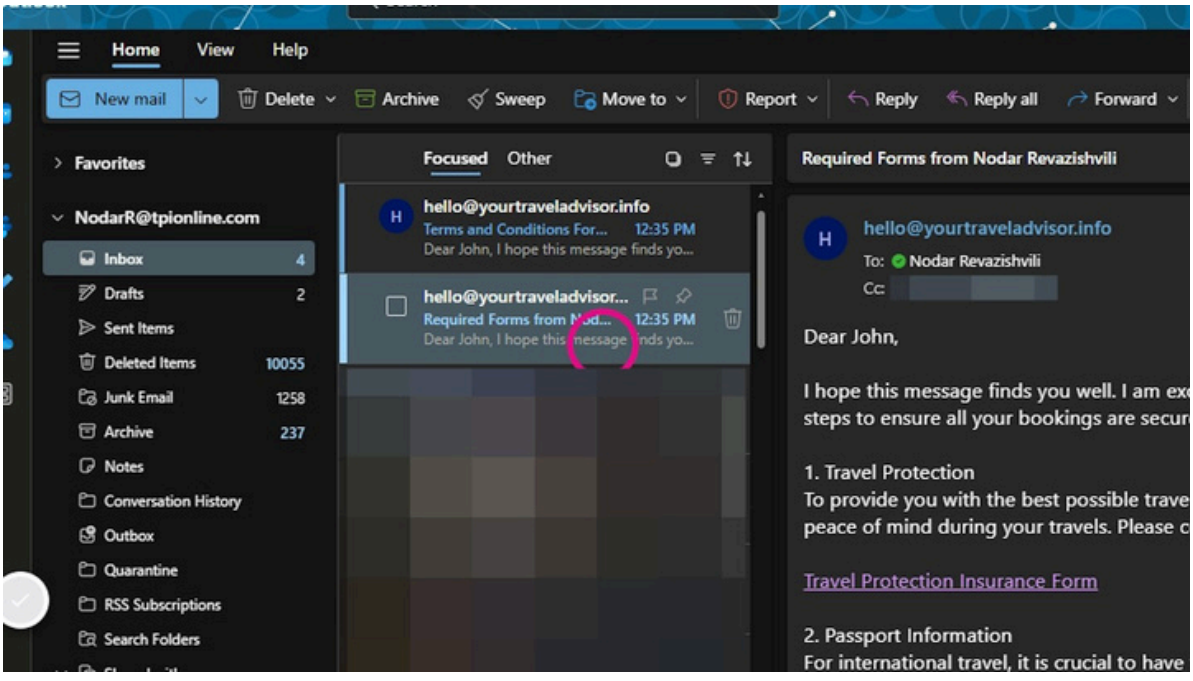
STEP 5

You must confirm that you are sure you want to email the Webforms to the selected client.



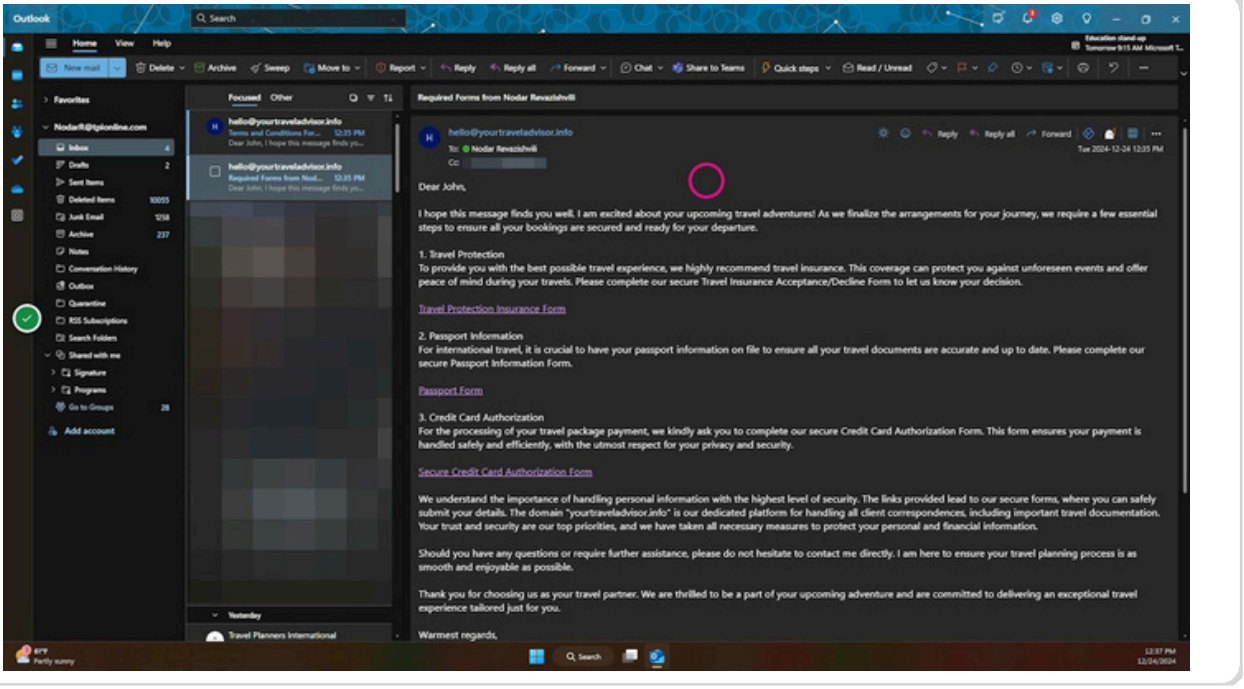
STEP 6

Please note the email address that your clients will see in their inbox is "hello@yourtraveladvisor.info".



STEP 7

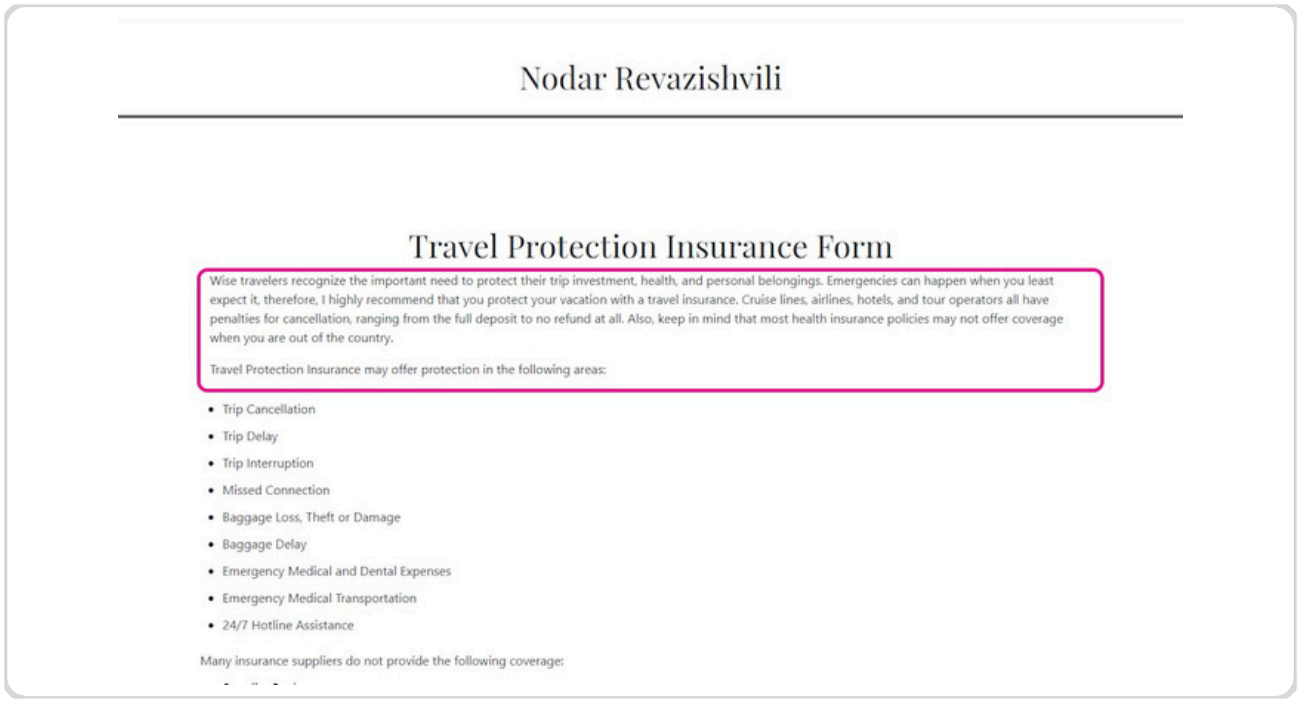
We have also changed the verbiage your clients will see, when they get the email from you, and your clients will see all the webforms in one email, they can select which form they want to fill out.



STEP 8

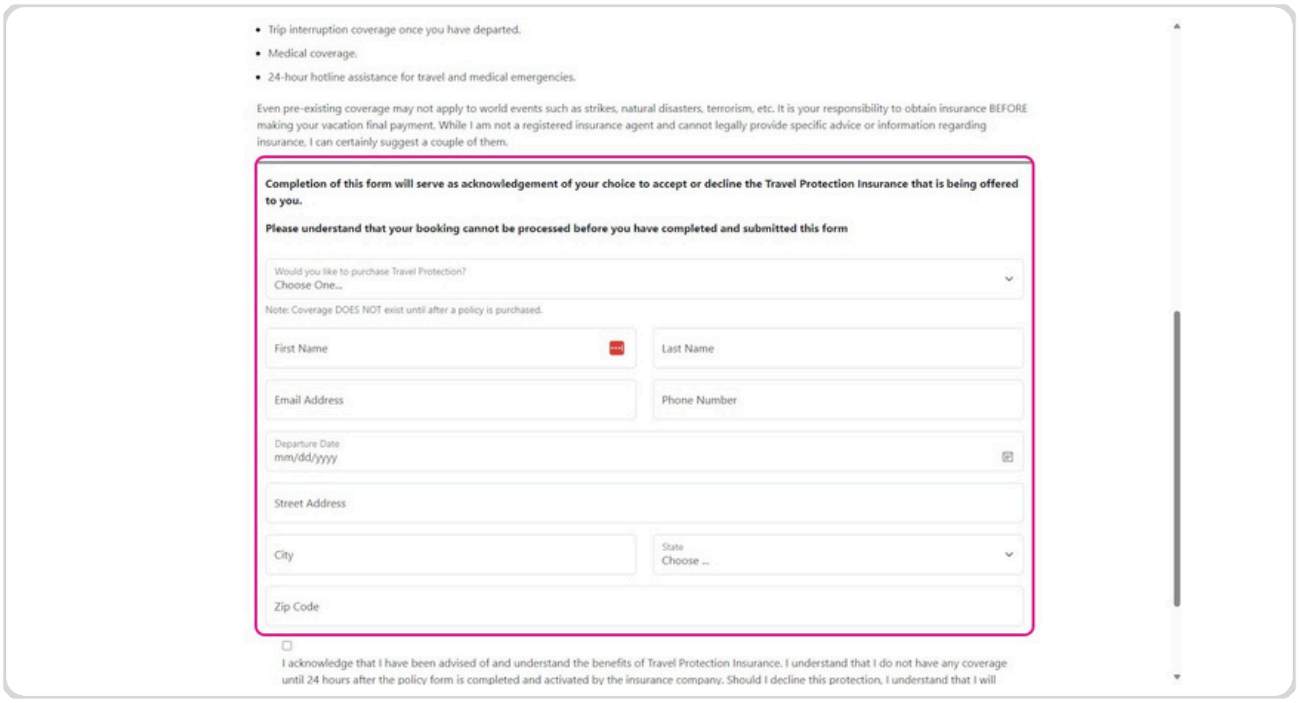
Below you will see examples of a few Travel Webforms.

The Travel Protection form is up first, on this form we outline what types of protections Travel Insurance may offer your clients.



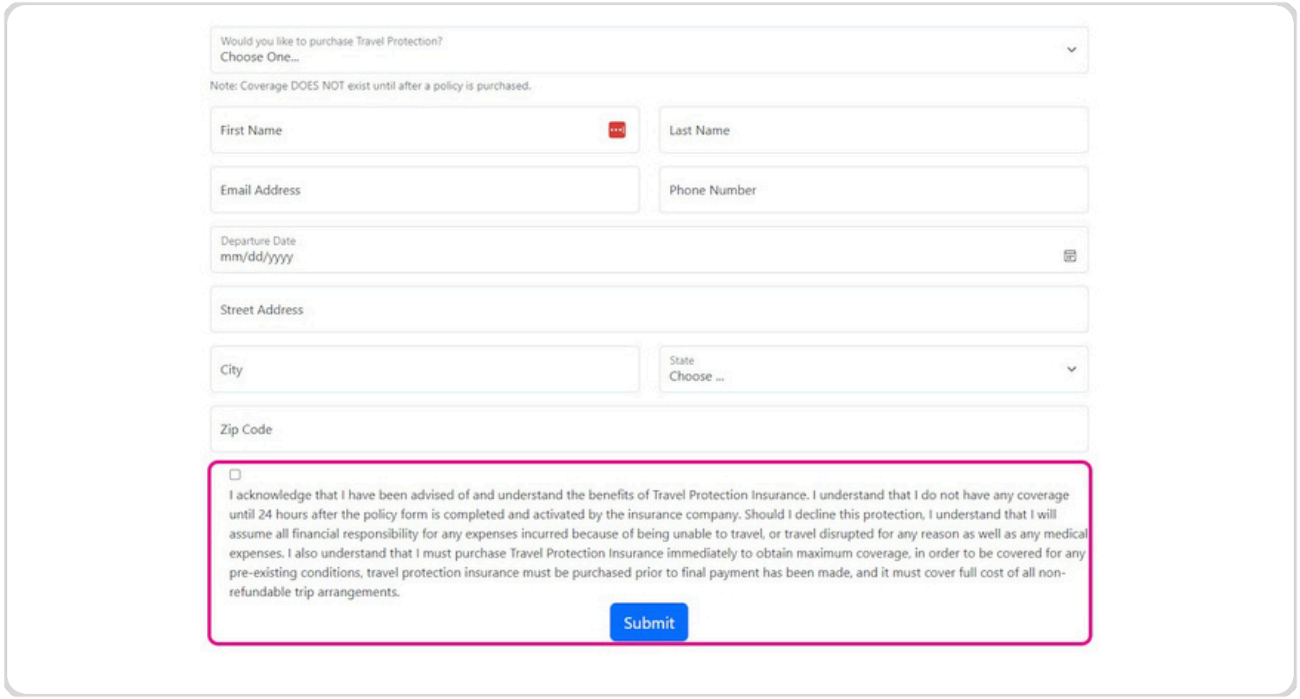
STEP 9

Your clients will have the option to fill out the form.



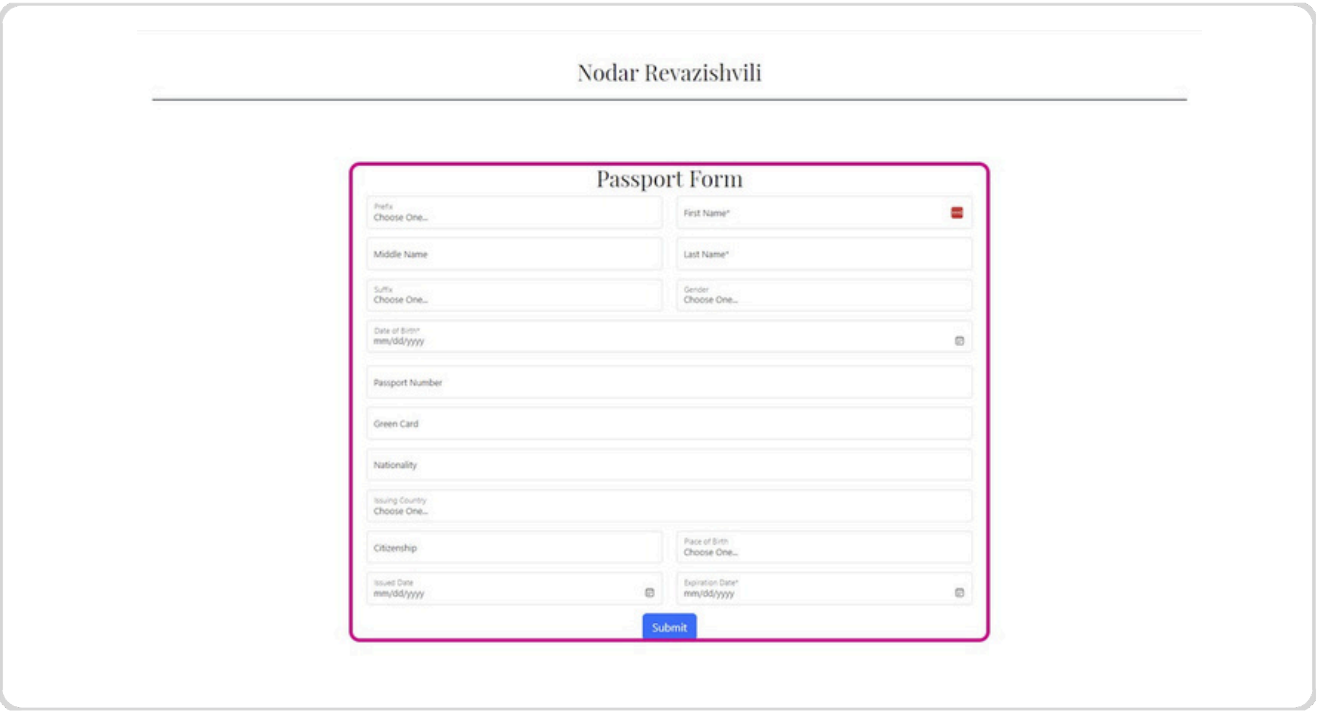
STEP 10

If your clients choose to decline Travel Protection, they will have to click on a button stating that they have been acknowledged of the form and its benefits.



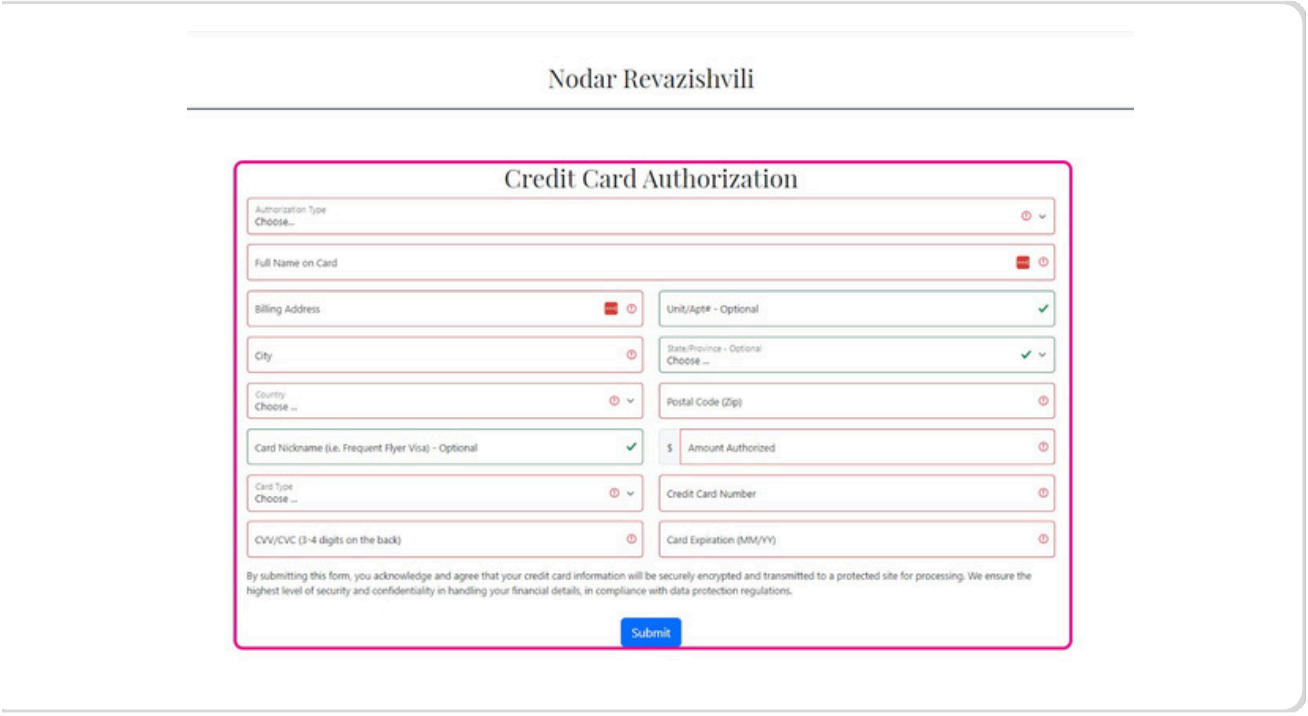
STEP 11

The Passport Form is also very simple. Your clients will have to fill out and click on the "Submit" button to submit the form to you.



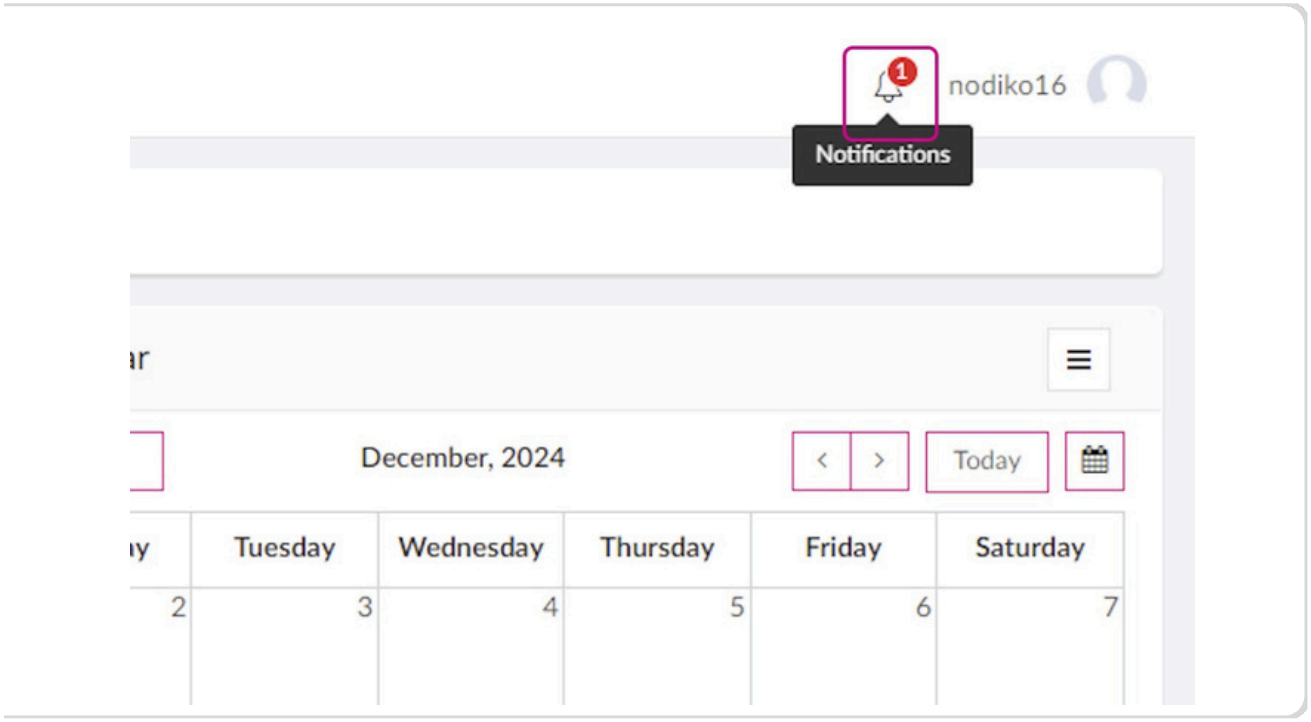
STEP 12

The same goes for the Credit Card Authorization form. Your clients will need to fill the form out and click on the "Submit" button to submit the form to you.



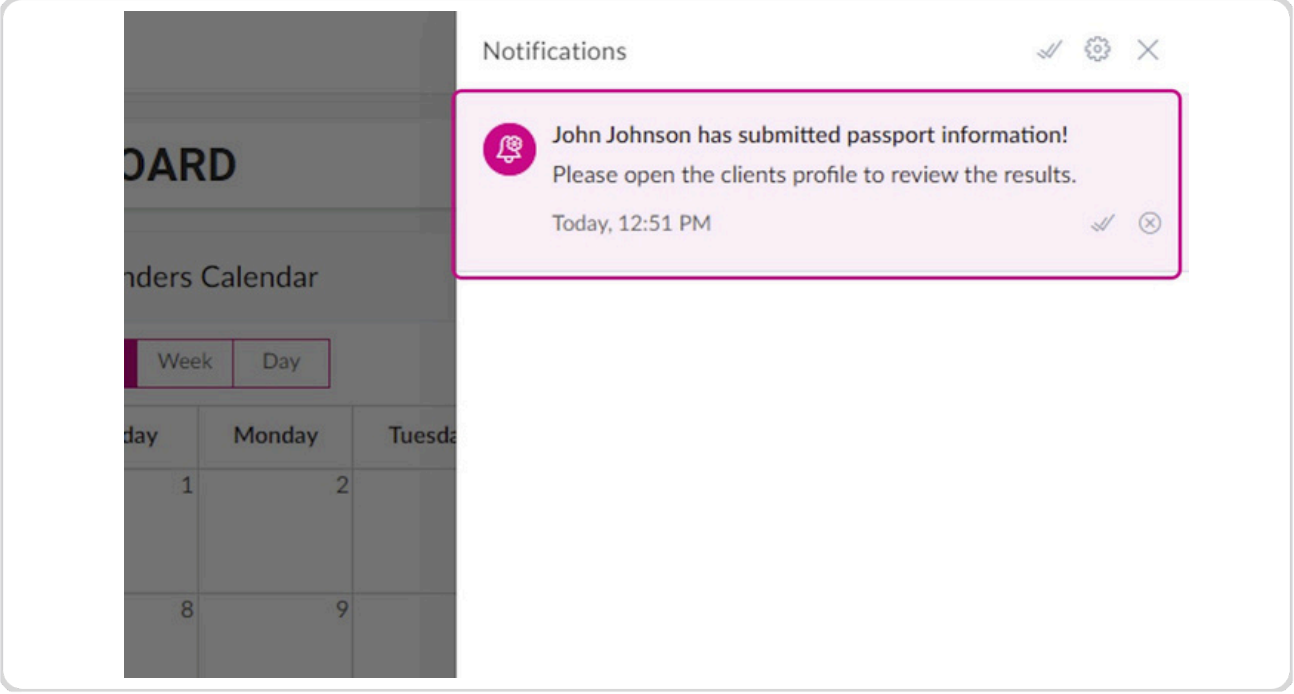
STEP 13

When your clients submit the Webforms, you will receive an email notification, as well as a notification on TPISuitcase. The notification will be in the top right-hand side of the page, and it looks like a bell icon.



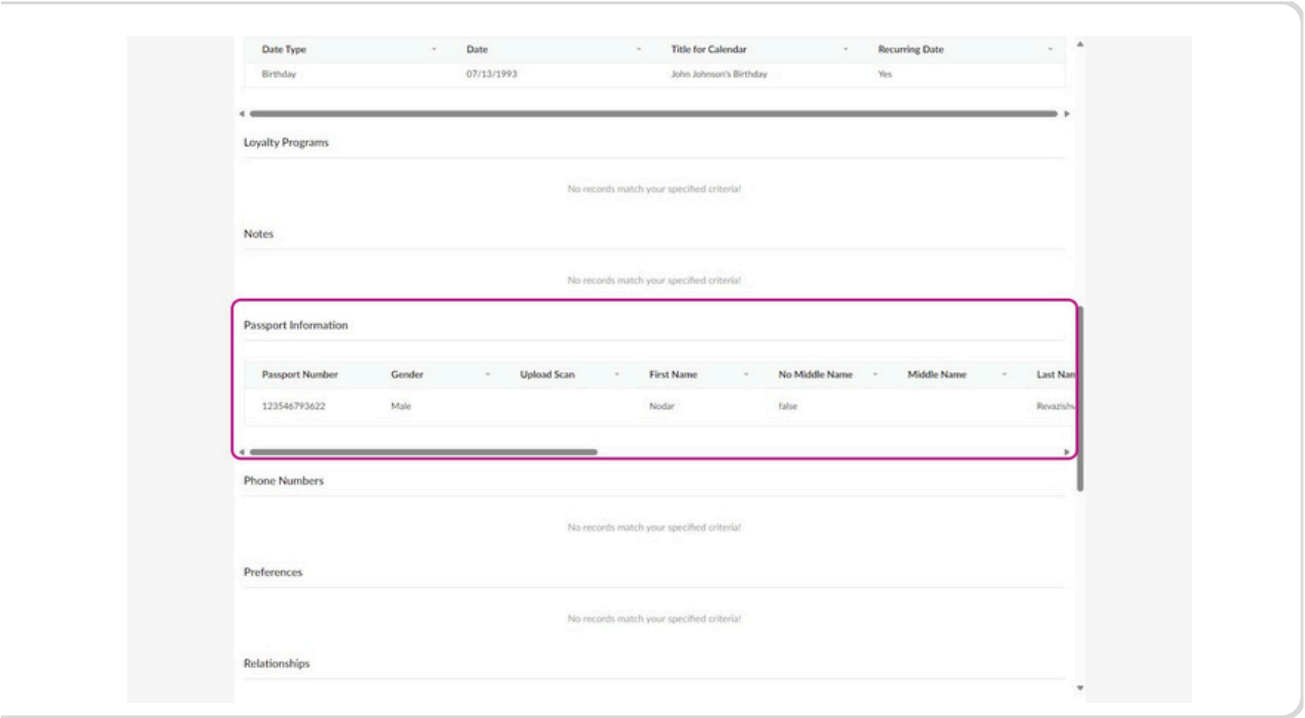
STEP 14

When you click on the bell icon, you will see the notification itself. as well as the time the notification arrived.



STEP 15

Once you click the notification, a new page will open up with your client's details. In this example, our client has submitted the Passport Form to us, and we see it under "Passport Information".



TPISUITCASE

EMAILING WEBFORMS THROUGH TPISUITCASE

COMPLETE