TPISUITCASE

TPISUITCASE & CORE EXPLAINED:

YOUR GATEWAY TO EXPERT TRAVEL PLANNING

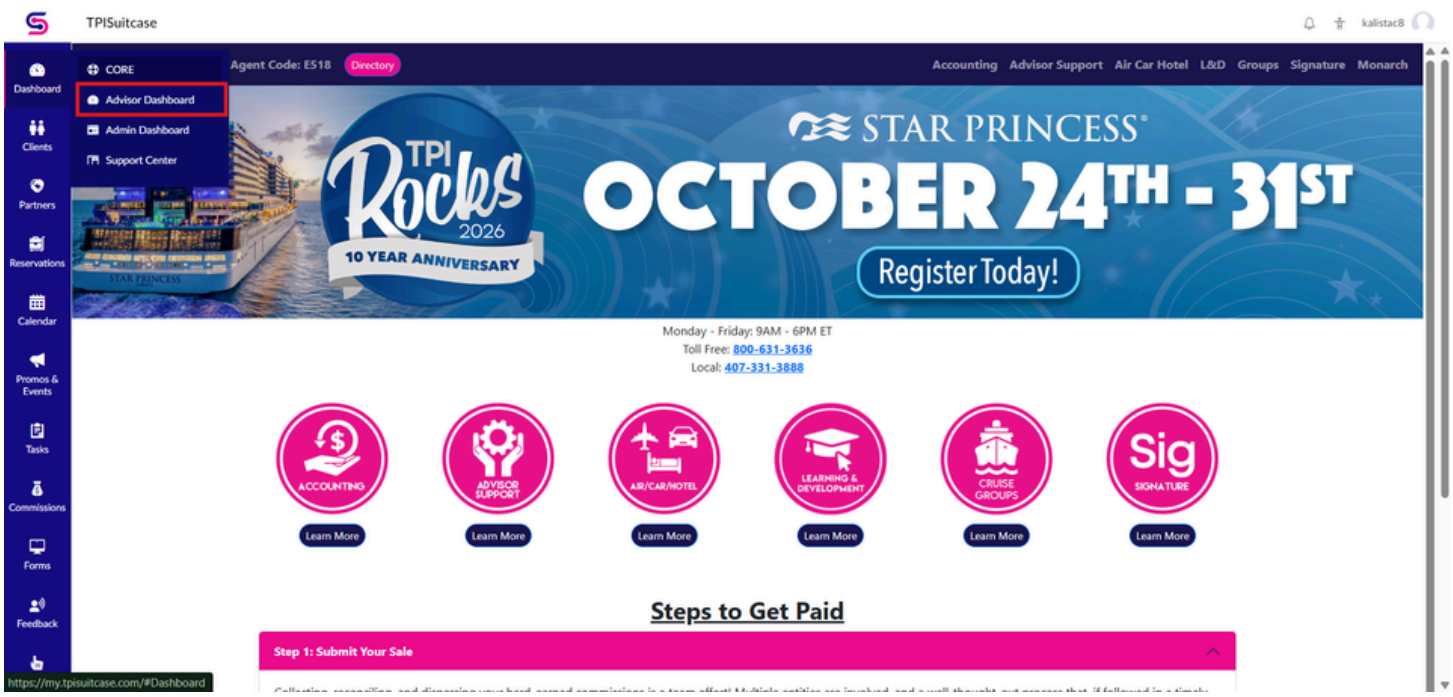
NAVIGATING THE ADVISOR DASHBOARD

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

STEP 1

When you log in to TPISuitcase, you will automatically land on CORE (Community Optimized Resource Education)

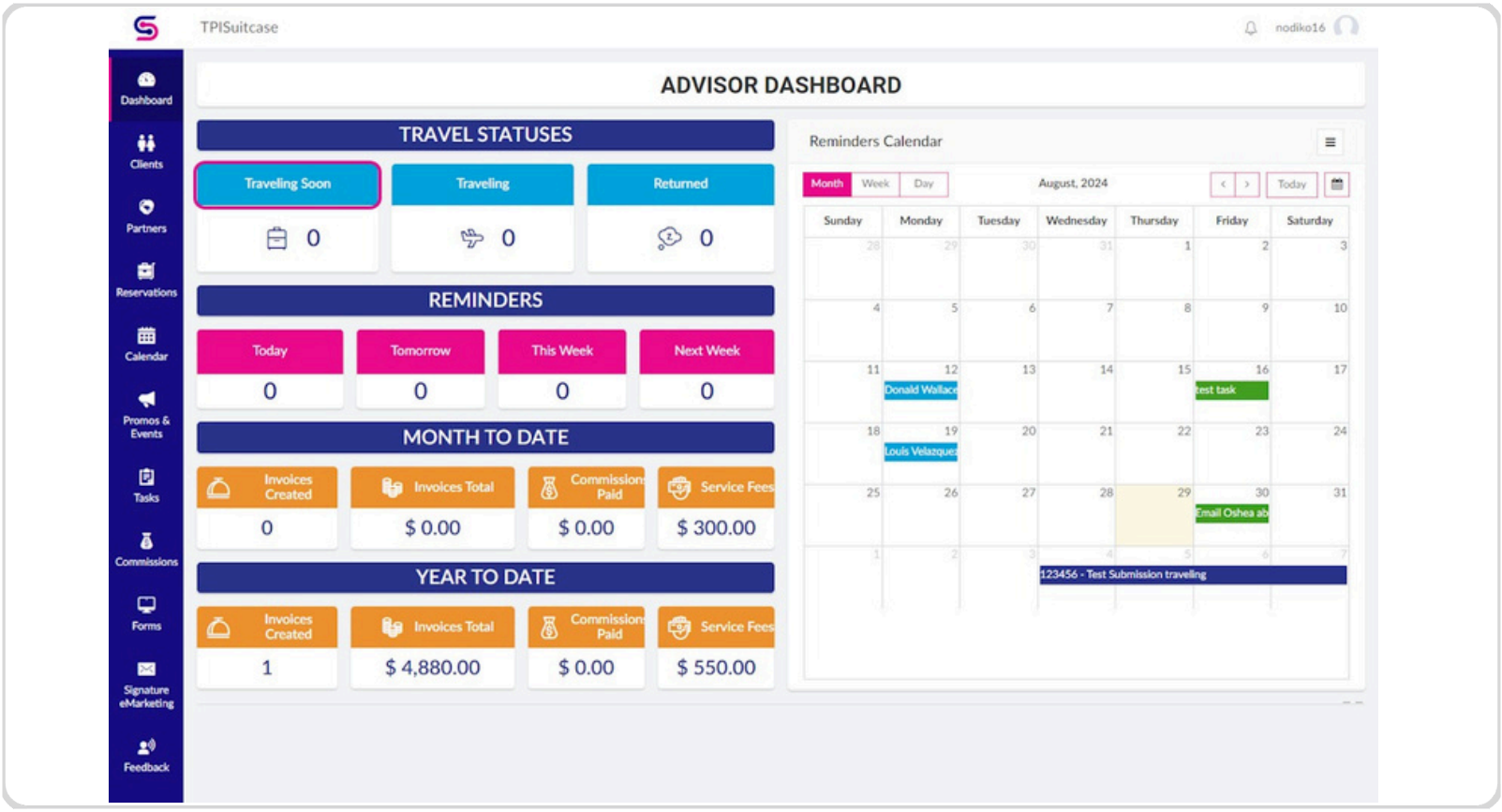
From CORE, hover over "Dashboard" and click on Advisor Dashboard.



STEP 2

The Advisor Dashboard is comprised of a few modules that make it easier for you to manage your agency quickly.

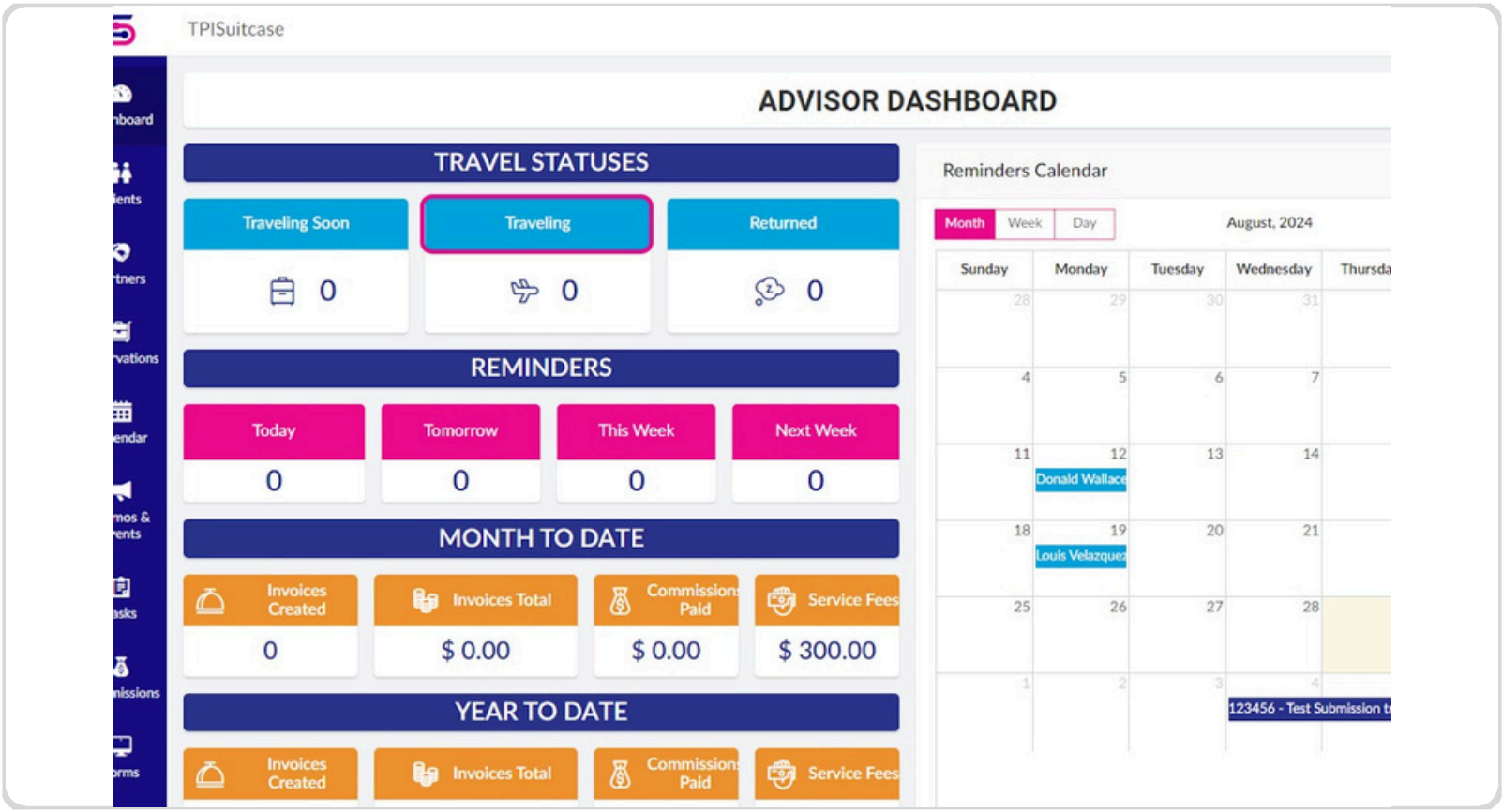
We have plans to add more modules to this space so stay tuned!



STEP 3

The top left section will show you your clients' travel statuses.

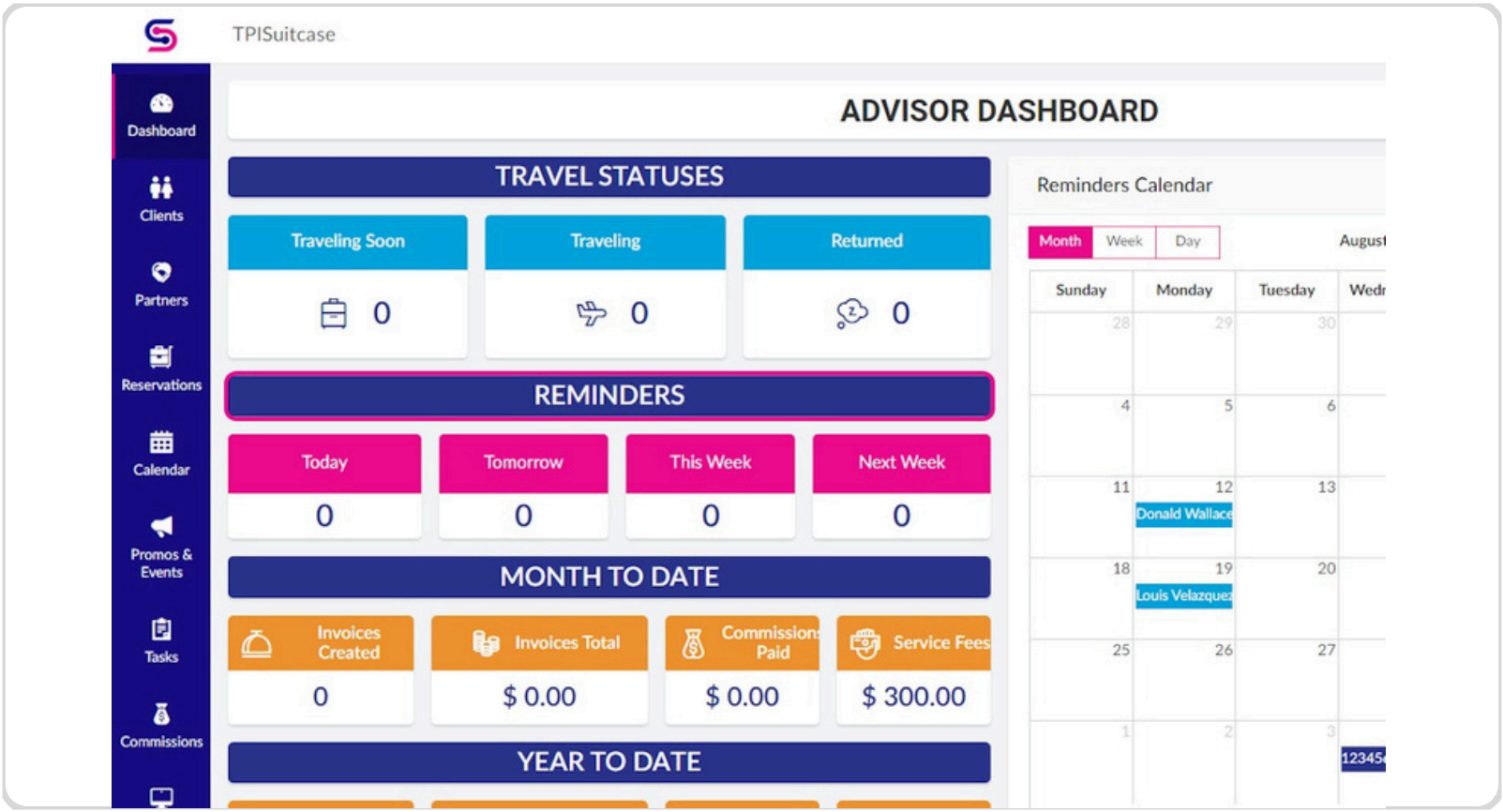
This information is automatically updated based on your clients' travel dates.



STEP 4

“Reminders” show you a quick look of how many reminders you have set for yourself.

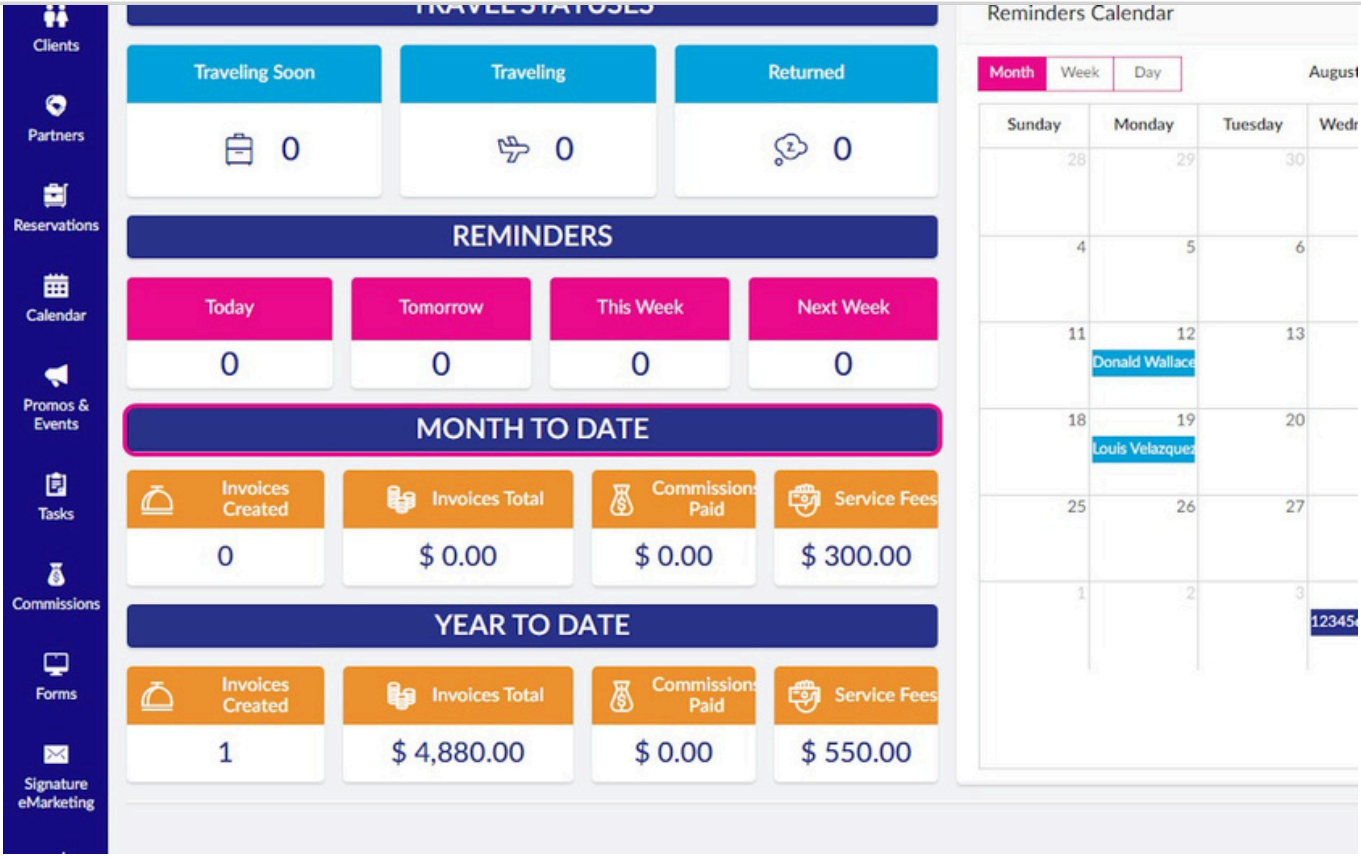
You will be able to see the reminders in your calendar and also be able to interact with them by right clicking on it.



STEP 5

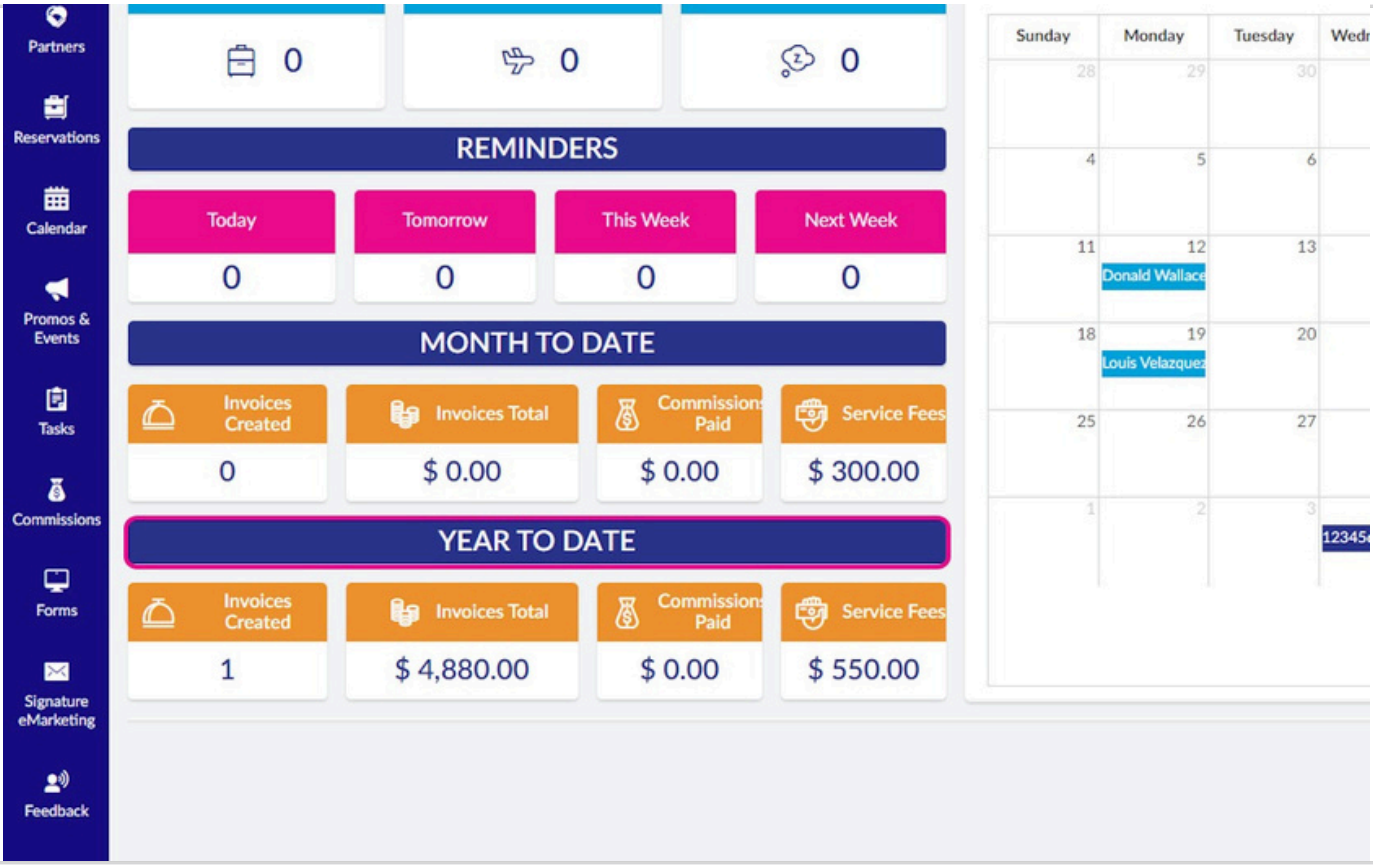
The “Month to Date” section displays how many invoices you have created and subsequent invoice commission and service fee totals.

We have chosen to gather information for commissions and money received from invoices instead of quotes to ensure your numbers are stable and represent a clearer outlook on future earnings.



STEP 6

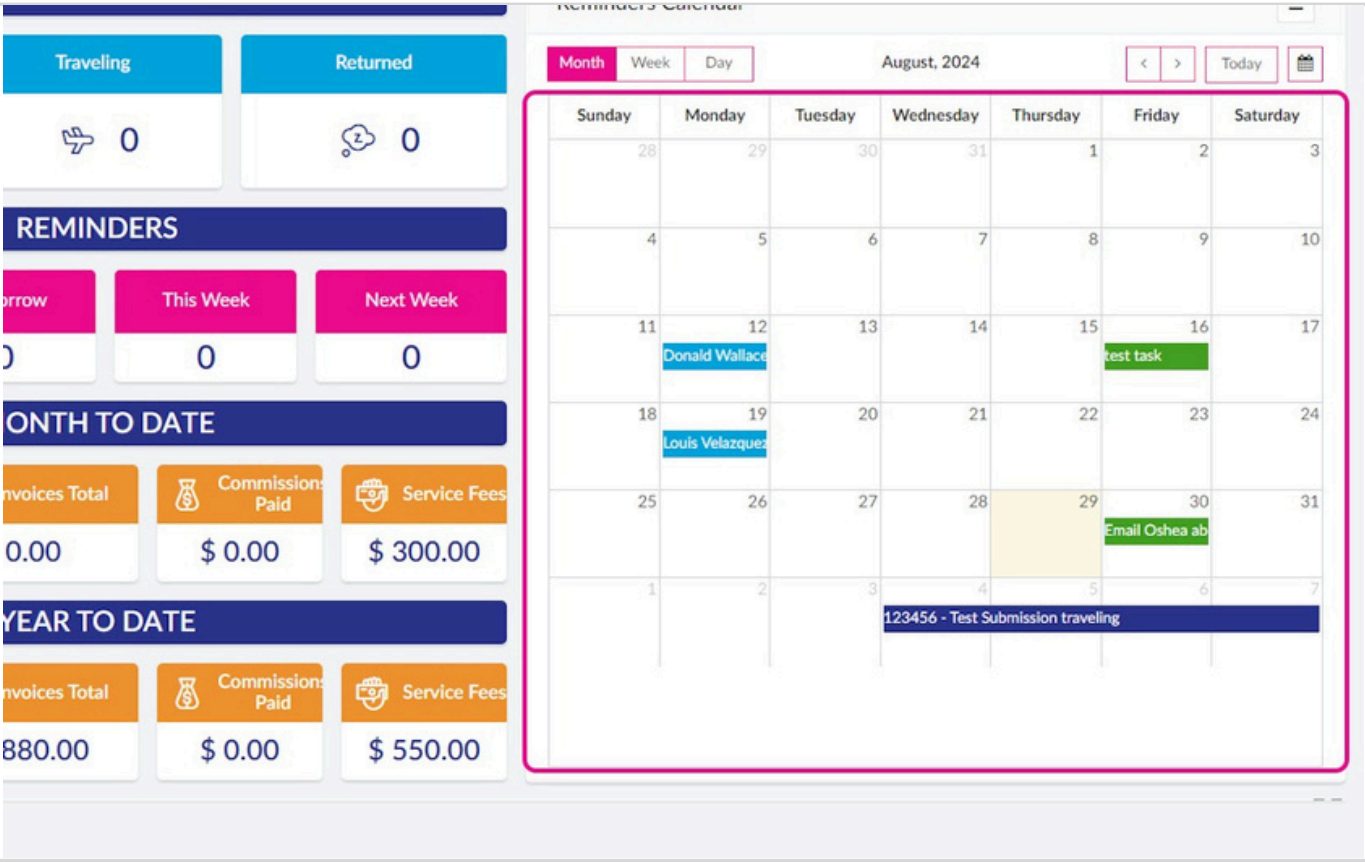
The “Year To Date” gathers all the same info as “Month To Date”, but gives you a better outlook from the beginning of the year to make it easier to visualize your numbers.



STEP 7

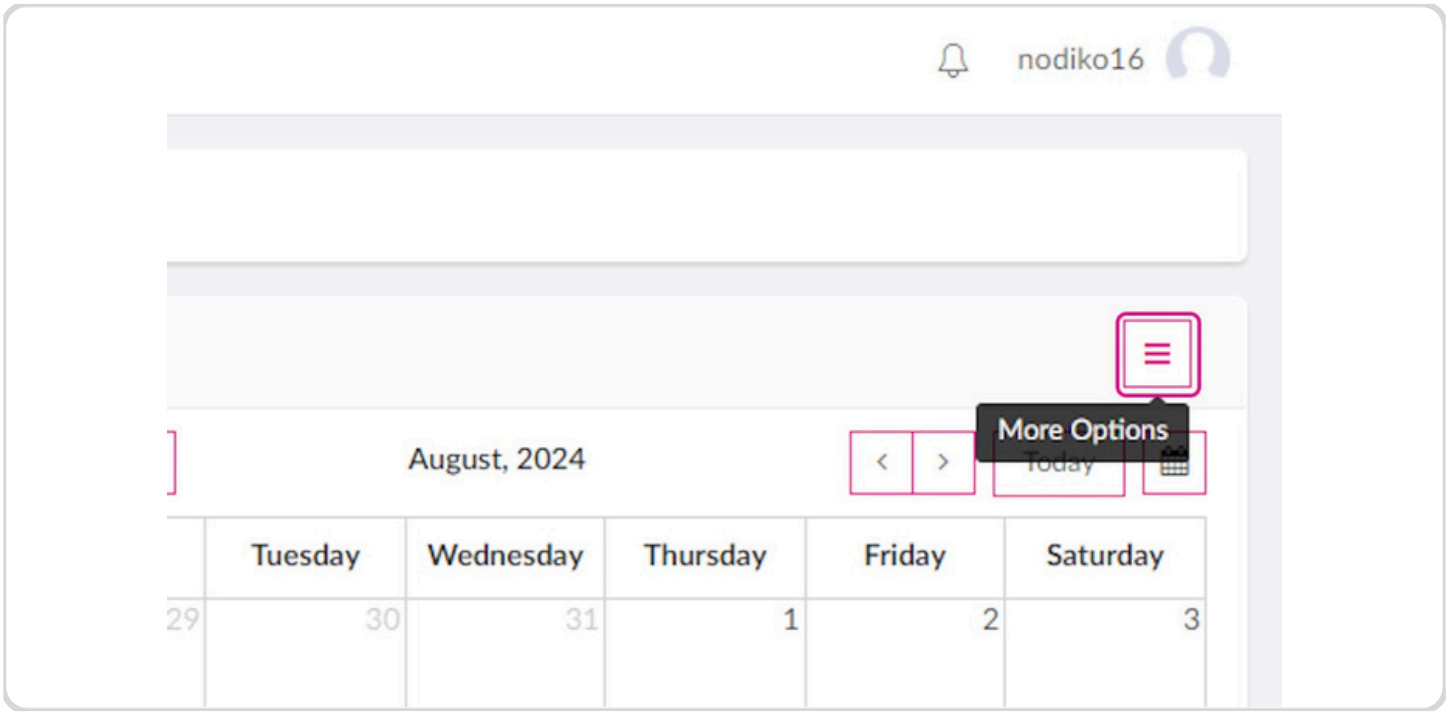
The calendar on the right-hand side of the page makes it easier for you to see all your upcoming and ongoing important dates.

You can interact with all the information you see on the calendar. If you right-click the task, you can open it and edit it. If you right-click your clients' travel dates, you can either open the reservation or open the main clients' profile.



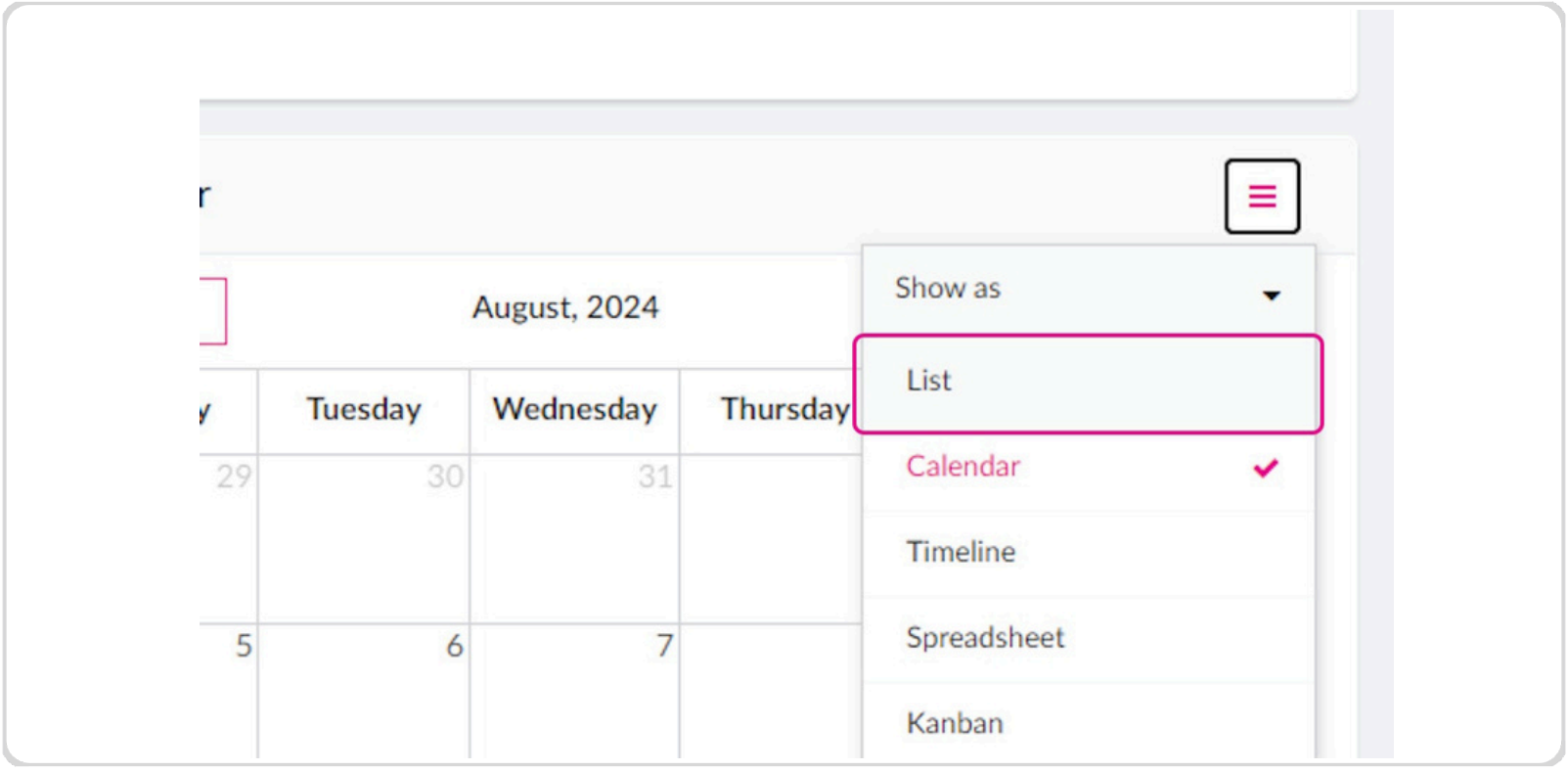
STEP 8

Above the calendar, you will see the "More Options" menu. When clicked, you will see other ways to display the calendar information.



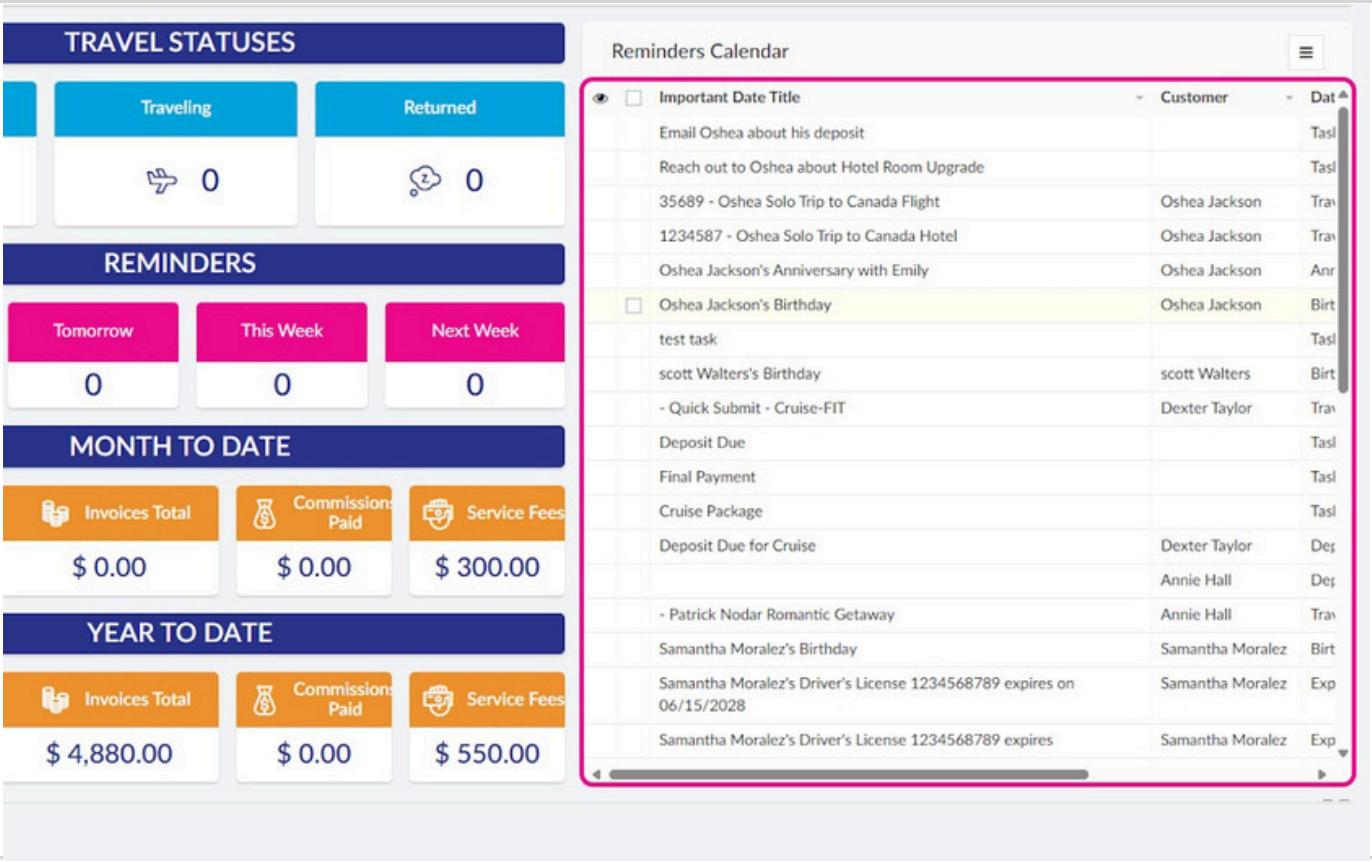
STEP 9

when the "More Options" button is clicked, you will be able to see all the ways you can display your calendar information.



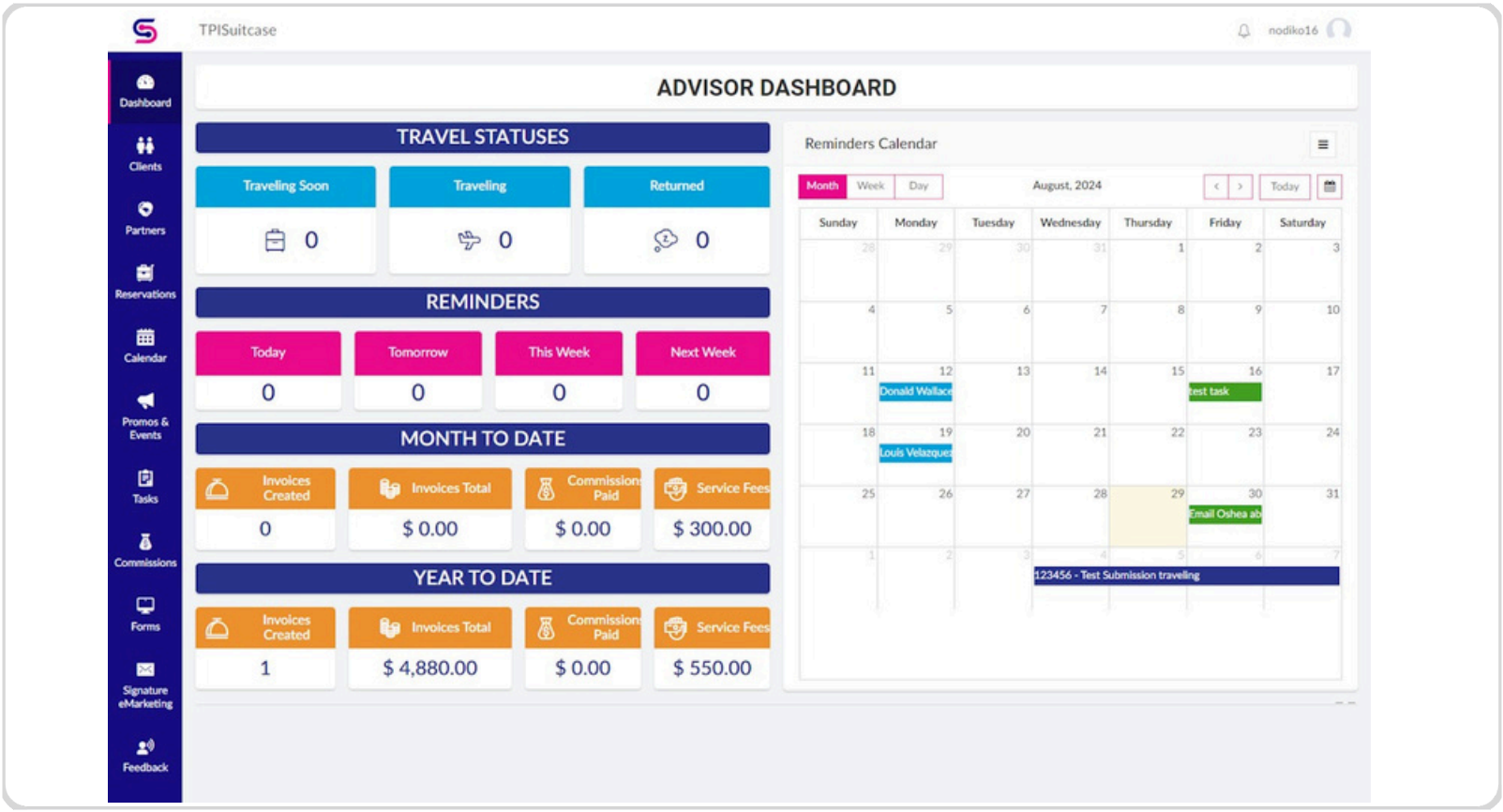
STEP 10

In this case, we have calendar information displayed as a "List"



STEP 11

This ends our overview of "Advisor Dashboard". If you have any questions, please do not hesitate to reach out to our Learning and Development Team at lnd@tpionline.com, and we will be more than happy to assist you.



TPI SUiTCASE

NAVIGATING THE ADVISOR DASHBOARD

COMPLETE