TPISUITCASE

TPISUITCASE & CORE EXPLAINED:

YOUR GATEWAY TO EXPERT TRAVEL PLANNING

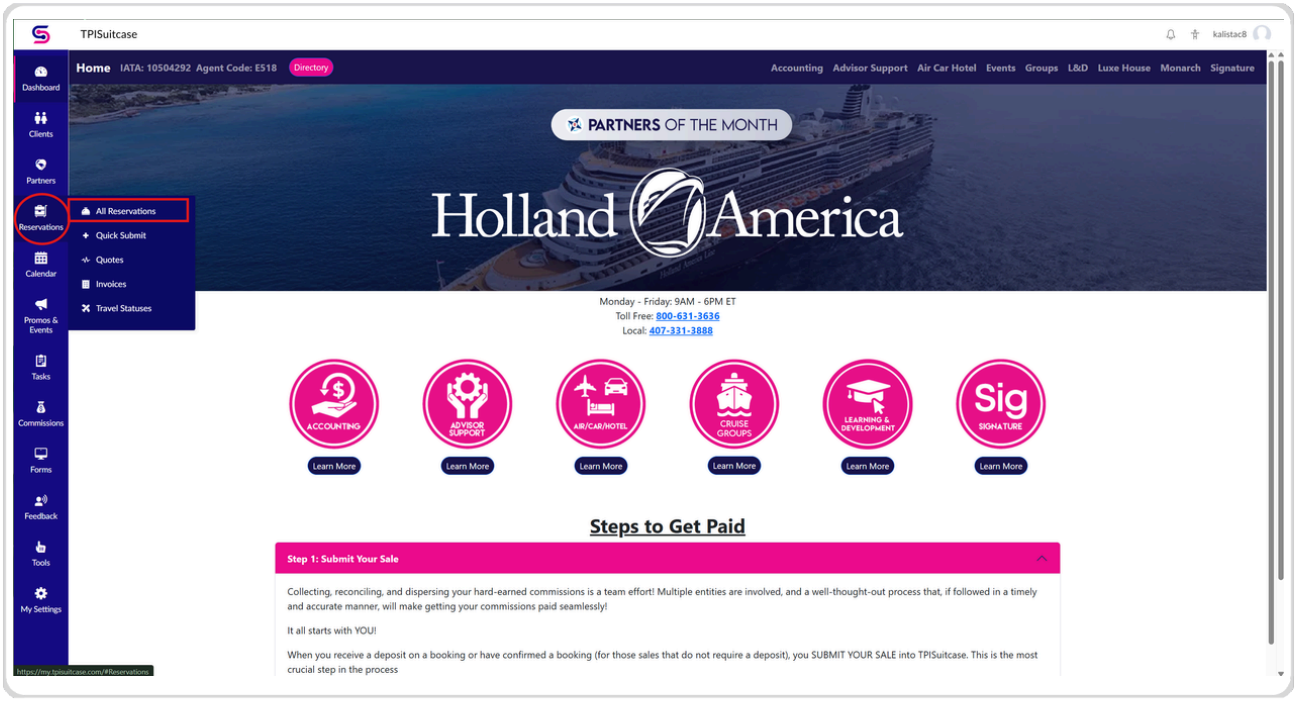
LONG FORM SALE SUBMISSION (ALL RESERVATIONS)

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

Travel Planners International - TPISuitcase

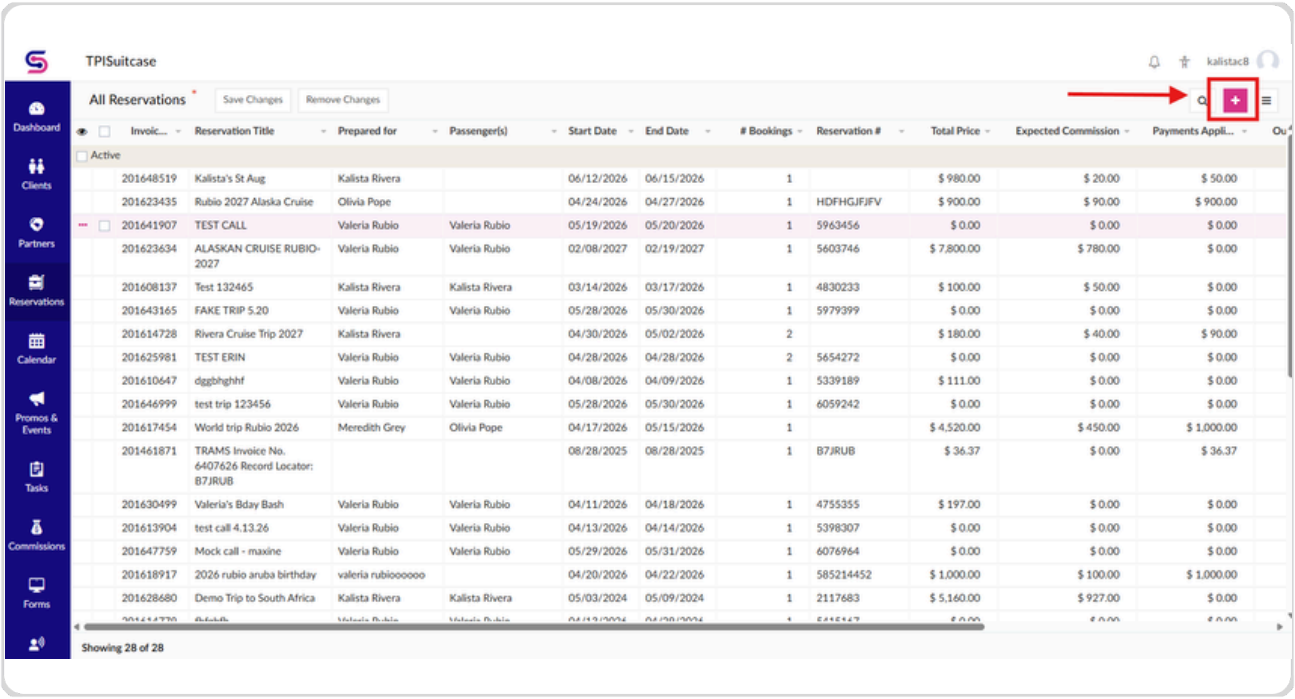
STEP 1

Once you've logged into TPISuitcase, click on the All Reservations section of the Reservations tab.



STEP 2

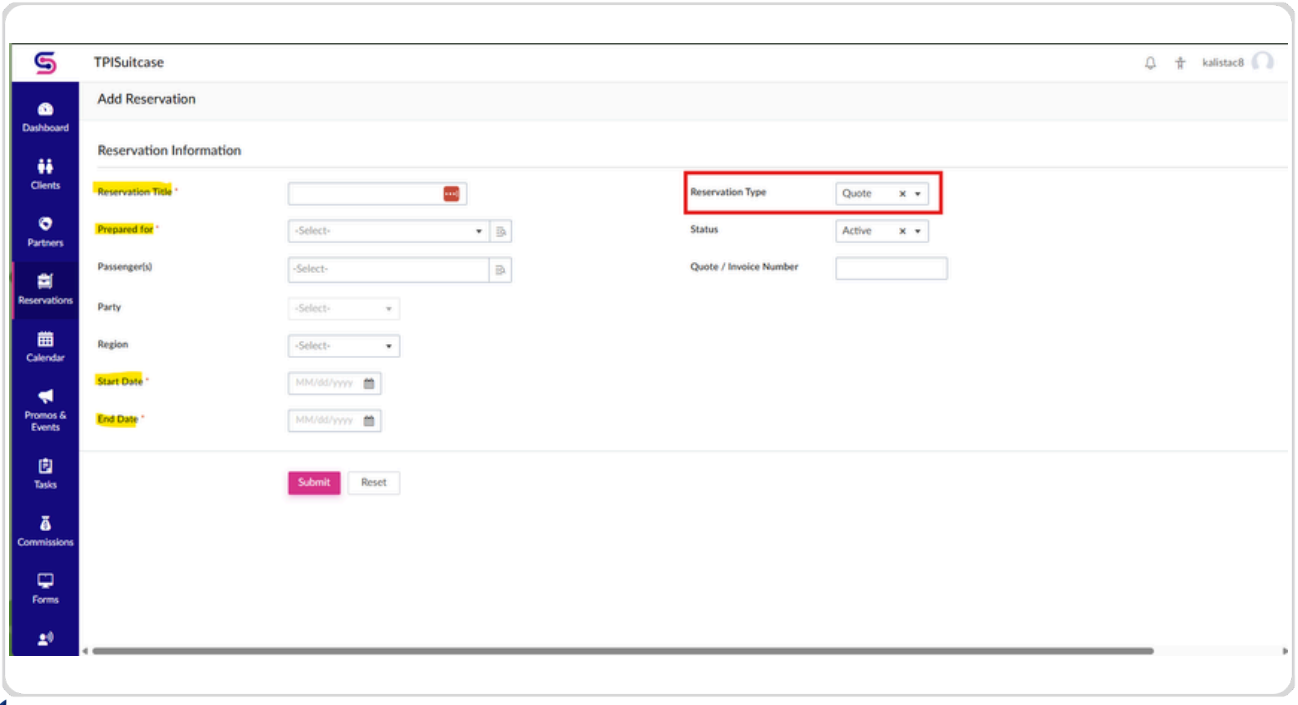
Click on the pink "+" button at the upper-right hand corner of your screen to proceed to the first portion of your submission.



STEP 3

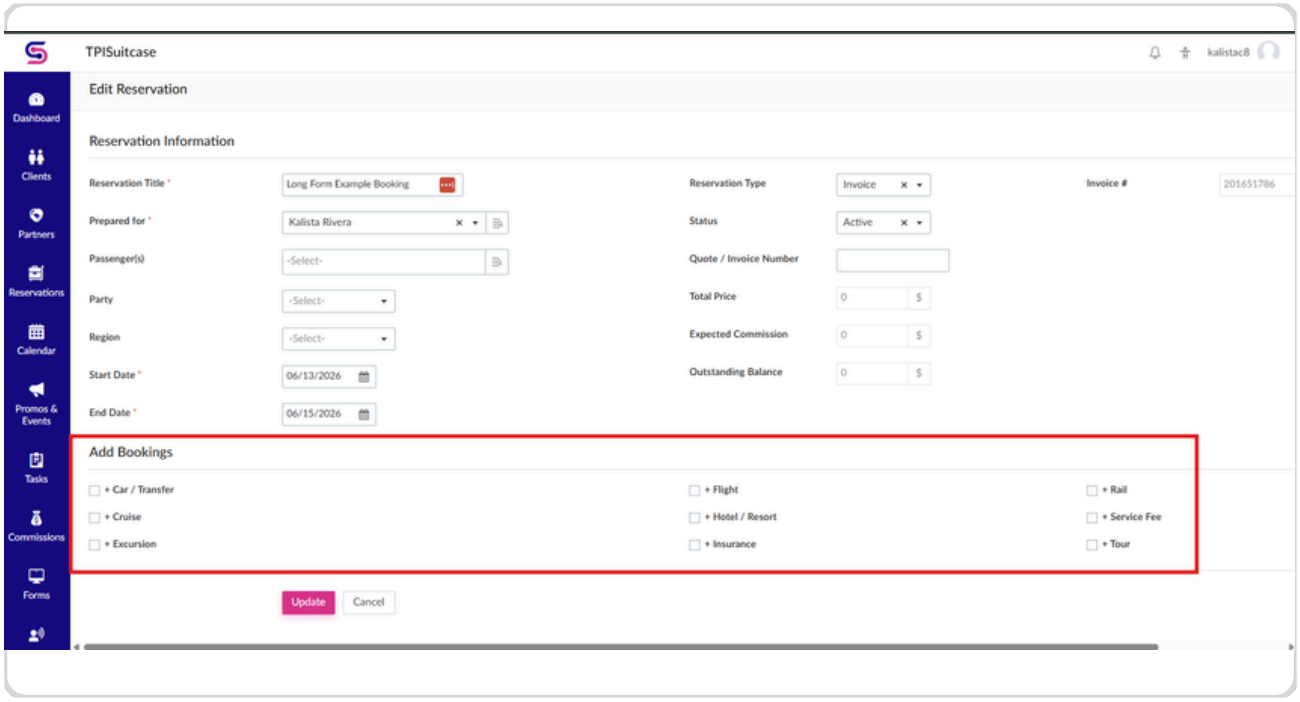
Fill out all of the required fields. Be sure to take a moment to switch the Reservation Type drop-down section from "Quote" to "Invoice" if this is a sale submission that has already received a client's payment towards the total.

Note: You will not be adding any specific reservation data on this first page. Once you click the pink submit button on the bottom of the page, do **NOT** click on anything else.



STEP 4

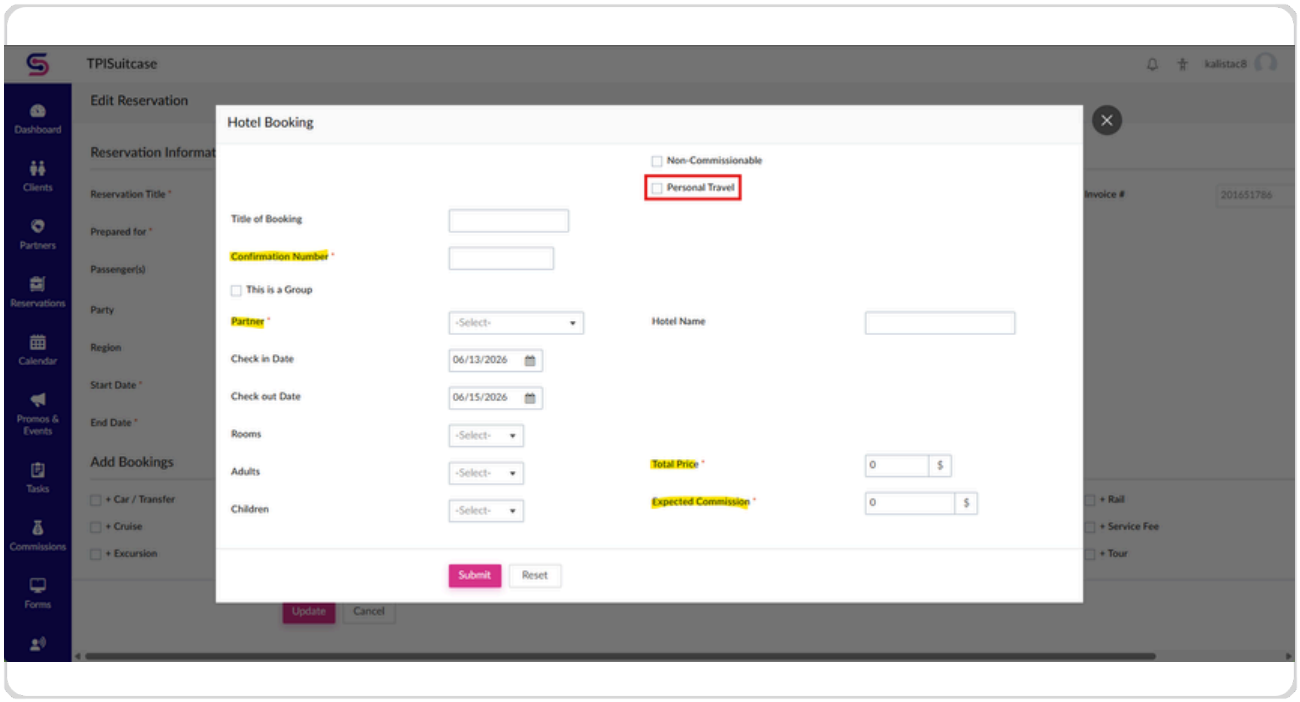
Once the second page appears, booking data can be entered in under the "Add Bookings" section on the bottom-half of the page by clicking on the box correlating with the type of travel you are submitting into the system.



STEP 5

After clicking on one of the options, fill out the required fields on the pop-up box according to your client's reservation and click Submit.

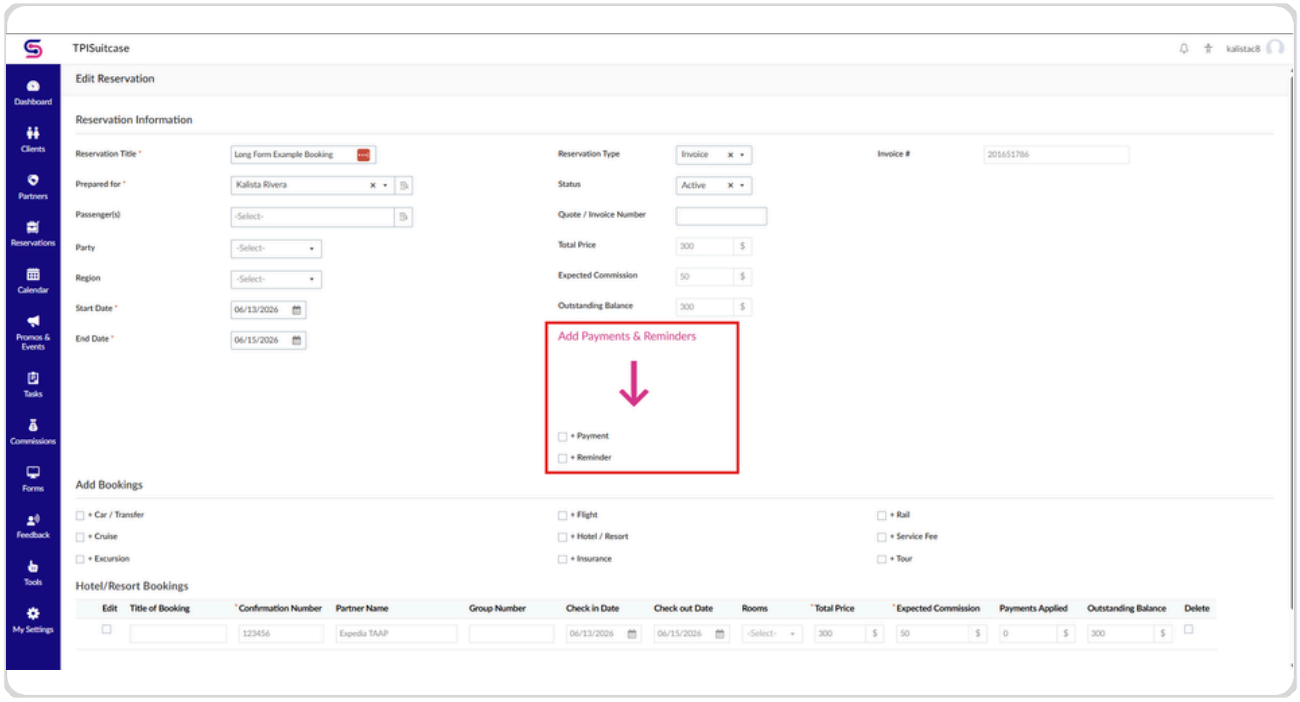
Note: If your submission is for "**Personal Travel**" (your name is on the booking), make sure to click the option for **Personal Travel** and upload a copy of your reservation confirmation from the partner.



STEP 6

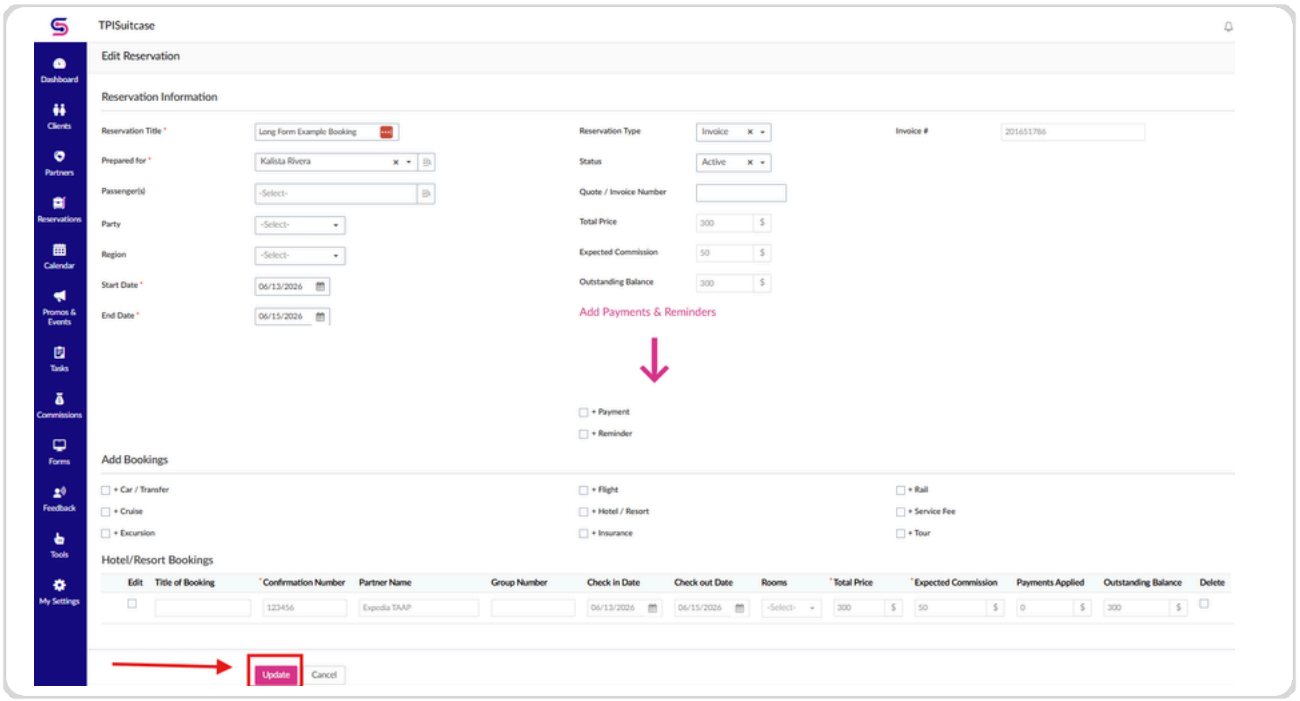
After entering the client's reservation details, a confirmation email will be sent to the email on file for your account and you can track any client payments/reminders for the submission.

Note: Reminders will not generate a reminder email to your inbox. It is important to track details in a separate area in addition to TPISuitcase to ensure no details are missed for your client bookings.



STEP 7

After submitting any bookings, payments, or reminders for your client's bookings, be sure to click the pink "Update" button on the bottom of the page to save your details.



TPI SUiTCASE

LONG FORM SALE SUBMISSION (ALL RESERVATIONS)

COMPLETE