TPISUITCASE

2.0 FAQ SHEET

HI ROCKSTARS! We know navigating our new TPISuitcase platform/system can be confusing at first. We have created this FAQ to answer some common questions to help make things a little easier for you.

Where is TPICentral?

TPICENTRAL and the old TPISuitcase (also known as "1.0") have been merged to create our new CRM platform TPISuitcase (also known as "2.0"). (https://my.tpisuitcase.com).

First time logging in?

Use the **"Forgot Password"** option on the login page to set your password. If these scenarios arise below, follow the respective actions:

+ ***"No account found":*** Attempt an alternative/previously used email address (unless you are new to TPI). If still unable to access, send an email to AdvisorSupport@tpionline.com.

+ ***Not receiving the One-Time Password (OTP)?:*** Check Spam/Junk folders and review email inbox security settings.

Where can I find the IATAN Number?

Log into TPISuitcase 2.0 > Locate and hover over the **"Dashboard"** tab on the left side > Click **"CORE"** > Click the **"Air | Car | Hotel"** button > Scroll down and Click **"Air Contracts".**
Note: The IATAN info us above the blue "view additional contracts" button.

My screen just keeps loading/won't do anything?

Sign out of TPISuitcase 2.0 and log back in to refresh your page.

Where do I find Monarch?

Log into TPISuitcase 2.0 > Go to the left navigation bar and hover over **"Dashboard"**> Click **"CORE"** > Click on **"Education"** (Pink Circle OR Upper Right Corner) > **"Marketing"** > **"Customizable Email Marketing (Free Tool)"** > **"Access Monarch"**.

Where do I find TPI's held cruise group space?

Navigate to the "Promos and Events" tab on the left navigation bar > **"Hot Deals"**> **"Cruise Discounts".**

My advisor/admin dashboard information is not correct; how do I get this updated?

This is part of the data migration process and will be corrected once finalized. We appreciate your patience.

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How do I access the chat feature?

Go to the **"Dashboard"** tab on the left > **"Support Center"** > Click the Pink Chat Bubble/Button (in the bottom right-hand corner) > Then click the Chat Bubble icon (fourth square over).

How do I view client credit card details?

Navigate to the **"Clients"** tab on the left navigation > Locate the respective client and click on their name > Click **"Edit"** from the panel that appears > Scroll past the **"Additional Information"** section to find **"Payment information"** > Click the **"Display Card CC"** checkbox to view details.

How do I remove/delete a client?

Navigate to the **"Clients"** tab on the left navigation bar > Locate the respective client and click on their name > Click "**Edit"** from the panel that appears > Locate the **"Status"** drop-down under **"Basic Information"** > Select the appropriate status.

How do I send webforms?

Navigate to the **"Clients"** tab on the left navigation > Locate the respective client and hover over the left-hand side of the screen to select the ellipsis (**"..."**) > From the drop-down menu, select the form you want to send to your clients OR send all of them by selecting the option for **"Email Travel Webforms".** *Note: The client must have their email address marked as the primary email on profile or no webform will be sent.*

How do I set my Terms and Conditions?

Locate **"My Settings"** on the left navigation bar (at the bottom) and click on **"My Settings"** again from the expanded menu. Click the pink **"Add Settings"** button and scroll down to the **"Terms and Conditions"** box to add any text that would need to be included in your webform. *Note: To update your terms and conditions, follow the steps outlined above to locate the "My Settings" page, and once on the page, click on the line where all the "Yes's" appear. Scroll down, and your existing terms and conditions will appear in the same text box for editing.*

How do I mass import my client list?

Unfortunately, this is not a feature at this time.

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How do I mass edit my clients?

Go to the **“Clients”** tab on the left navigation > Click the check box directly to the left of your respective client’s profile > Then, click the **“Edit”** button that appears at the upper left of the page. > Once the quick view/birds eye view panel appears on the right of your screen, select the option from the drop-down menu that best fits your need.> Lastly, click **“Update”** and **“Confirm”** to complete the edit.

What is the “My Partners” tab for?

Used for local partners not located on the **“All Partners"** list OR for tracking service fees. *Note: It can also be used if a partner is not seen on the **“All Partners”** list for sale submission purposes. (If using a partner from **“My Partners”**: Currently, Long form is the ONLY way to submit sales for partners on "My Partners" list.).*

Where can I view instructions for gaining access to the travel partner?

Go to the **“Partners”** tab on the left navigation bar. > Click **“All Partners”** tab > Under the **“Portal Instructions”** column of each respective partner. *Note: If no information is available, please feel free to reach out to the Advisor Support team for further guidance.*

Where are the airline contracts located?

Click the **“All Partners”** tab (Under **“Partners”** tab on the left navigation bar) AND/OR **“Air | Car | Hotel”** section of **“CORE”** (Under **“Dashboard”** tab) AND/OR Under the **“Contract PDF”** column (You may need to scroll to the right of the page to view).

How do I do the long form/submission for submitting my sale?

Go to the **“Reservations”** tab > **“All Reservations”** > Locate the pink **“+”** to begin the long form. > Fill in ALL of the required information and wait to be redirected to the next page to add commission and pricing information on the individual component level (**“Add Bookings”** section).

Can I use quick submit for personal travel?

No.

Why do my reservations show as “paid” in full when they are not?

If the sale was entered into TPISuitcase 2.0 using the **“Quick Submit a Sale”** feature, the system will automatically mark it as paid in full. *Note: To remove payments,navigate to the*

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Why do my reservations show as “paid” in full when they are not? (Continued)

“Reservations” > ***“All Reservations”*** *on TPISuitcase 2.0 and click the respective reservation to open the side panel and edit the reservation. Once the reservation details pull up, you may remove the payment from the “Payments” section by clicking the* ***“X”*** *at the left section of the payment information.*

+ Currently, transferred reservations from TPISuitcase 1.0 are not editable until the data sync has completed. We appreciate your patience.

What do the Travel Statuses mean?

Not Started = Clients are not traveling yet.

Traveling Soon = Travel is starting within 7 days.

Traveling = Clients are traveling.

Returned = Clients have returned from travel within the past 7 days.

Complete = Travel is completed

How do I view which reservation/client a reminder/task is for on the “Calendar” tab

Right-click on the banner for the reminder or task in question and select **“Open Client/ Reservation”**. > This will open a new window with the information selected.

Why do I see reservations on my “Unclaimed Commissions” tab that don’t belong to me?

The **“Unclaimed Commissions”** tab is a new feature to TPISuitcase 2.0 that contains ALL of TPI’s received commissions that do not have a sale submission to claim in the system.

What is the "Claims Pending” tab for?

“Claims Pending” will house ALL of the claims an advisor submits on the **“Unclaimed Commissions”** tab. Once an unclaimed commission is found and claimed, the status can be viewed on this page.

Where are the interim statements and report builder features located?

Currently, TPISuitcase 2.0 doesn’t have the report builder feature available; however, you can locate all your currently posted commissions under Commissions > Interim Statement in the blue navigation bar. Please pay attention to the "Posted Date" column, as you can post commissions that fall into two separate pay periods. If the screen is blank, you do not have any commissions currently posted.

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Why am I missing bookings on my "Unpaid Bookings" tab?

This is part of the last batch of data being moved from TPISuitcase 1.0. More to come!

How can I view my statements?

Log in to TPISuitcase 2.0 > Hover over the **"Commissions"** tab on the left navigation bar > Click the **"My Statements"** section from the drop-down menu > Click on the **"View Statements"** button, and a new page will open with the statement details. (Currently unavailable for Associate Advisors) *Note: Popups must be enabled in your browser to view statements. Click **HERE** for more information on enabling pop-ups.*

Can I export my statement into a PDF?

Currently, the only format you can export your statements into from TPISuitcae 2.0 will be Excel format. Further updates will be announced once available!

How do I sign up for Signature Travel Network?

Log into TPISuitcase 2.0 > Hover over the **"Forms"** tab on the left navigation bar > Scroll down in the drop-down menu to the last option titled **"Signature Sign Up"** and click it to view the form > Fill out all required fields and submit.

Where can I view the booking engine for Air, Car, and Hotels?

Log into TPISuitcase 2.0 > Scroll down the left navigation bar to find the **"Tools"** tab > Click on "**Booking Engine"** from the drop-down.

What is the "OAG Flight Search"?

OAG Flight Search is not a booking tool. Instead, it's a quoting and pricing tool designed to help travel advisors. Once an advisor finds an itinerary on any travel website, they can use this tool to generate a professional quote or price summary to share with their customer/client. It allows advisors like you to present travel options clearly, but it does not handle actual reservations or bookings.

How do I add my logo to my quotes and invoices?

Log into TPISuitcase 2.0 > Scroll down the left navigation bar to find the **"My Settings"** tab > Click on **"My Profile"** from the drop-down menu > Scroll to the right of the screen under the section labeled **"Address Information"** > Add your JPG/PNG to the **"Upload Logo"** section. *Note: Your picture will automatically be resized to fit on quotes and invoices sent from TPISuitcase 2.0.*

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TPISUITCASE 2.0 YOUTUBE LINKS

If you feel like you missed a YouTube Video or if you want a refresher, click on a topic below to watch.

SUITCASE 2.0 ASK JEFF ANYTHING
Watch Here

SALES SUBMISSION GUIDE
Watch Here

NAVIGATING THE PARTNERS TAB
Watch Here

MANAGING CLIENTS & WEBFORMS
Watch Here

CLAIMING UNCLAIMED COMMISSIONS
Watch Here

ACCESSING SUPPORT RESOURCES
Watch Here

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TPISUITCASE 2.0 QUICK START VIDEO GUIDES

Click on a video below to learn how to navigate TPISuitcase 2.0

NAVIGATING CORE
Watch Here

ADVISOR DASHBOARD
Watch Here

CLIENTS TAB
Watch Here

VIEW & REQUEST ACCESS TO PARTNERS
Watch Here

HOW TO QUICK SUBMIT A SALE
Watch Here

HOW TO CREATE & EMAIL QUOTES
Watch Here

CREATE A TASK
Watch Here

NAVIGATING FORMS
Watch Here

POINT & CLICK BOOKING ENGINE
Watch Here

OAG FLIGHT SEARCH
Watch Here

NAVIGATING THE PROMOS & EVENT TAB
Watch Here

EMAILING WEBFORMS THROUGH SUITCASE
Watch Here

EDITING A QUICK SUBMITTED SALE
Watch Here

VIEWING YOUR STATEMENT
Watch Here

ENABLING YOUR NOTIFICATIONS
Watch Here

DATA EXPORT
Watch Here

NAVIGATING THE BILLING PORTAL
Watch Here

Travel Planners
INTERNATIONAL