

Tripian

Process Documentation - updated as of **Nov 17, 2023**

Training dates covered: **Nov 14, 2023** to **Nov 17, 2023**

Tripian

Client name: Jeff Kischuk

Client's email address and phone number: jeff@tripian.com +1.4165699247

Other point of contact: Robert Simon robert@tripian.com

Uplevel Gmail and LastPass login details

Gmail: calvin@uplevelsolutions.com

Password: CalvinEspino2023!

Company Generated Email: calvin@tripian.com

Password: CalvinEspino2023!

LastPass: calvin@uplevelsolutions.com

Password: CalvinEspino2023!

OpenPhone Number: not applicable

Description of the Company

Internal

Tripian is a travel-tech company that focuses on travel management and our client needs assistance in organizing and managing email and building a list of data that will be provided by their team for their perusal.

External

There are probably external individuals that may aid in the business process of our client and it may affect the output and performance of the tasks.

OVERVIEW

Tripian is a travel-tech company that focuses on travel management especially in the planning aspect. It uses the power of AI to help out planning and makes the travel itineraries comprehensive and personalized.

Task Checklist

Daily Tasks

- ☐ Usage of Apollo
- ☐ Usage of Copper CRM
- ☐ Usage of Airgram
- ☐ Usage of Otter
- ☐ **End of Day Report**

Weekly Tasks

- ☐ Consolidate work or tasks done with relation to training
- ☐ **End of Week Report**

Programs/Software/Apps

- ☐ [Apollo](#)
- ☐ [Copper](#)
- ☐ [Airgram](#)
- ☐ [Otter](#)
- ☐ [LinkedIn Sales Navigator](#)

STEP BY STEP PROCESS (BY PRIORITY)

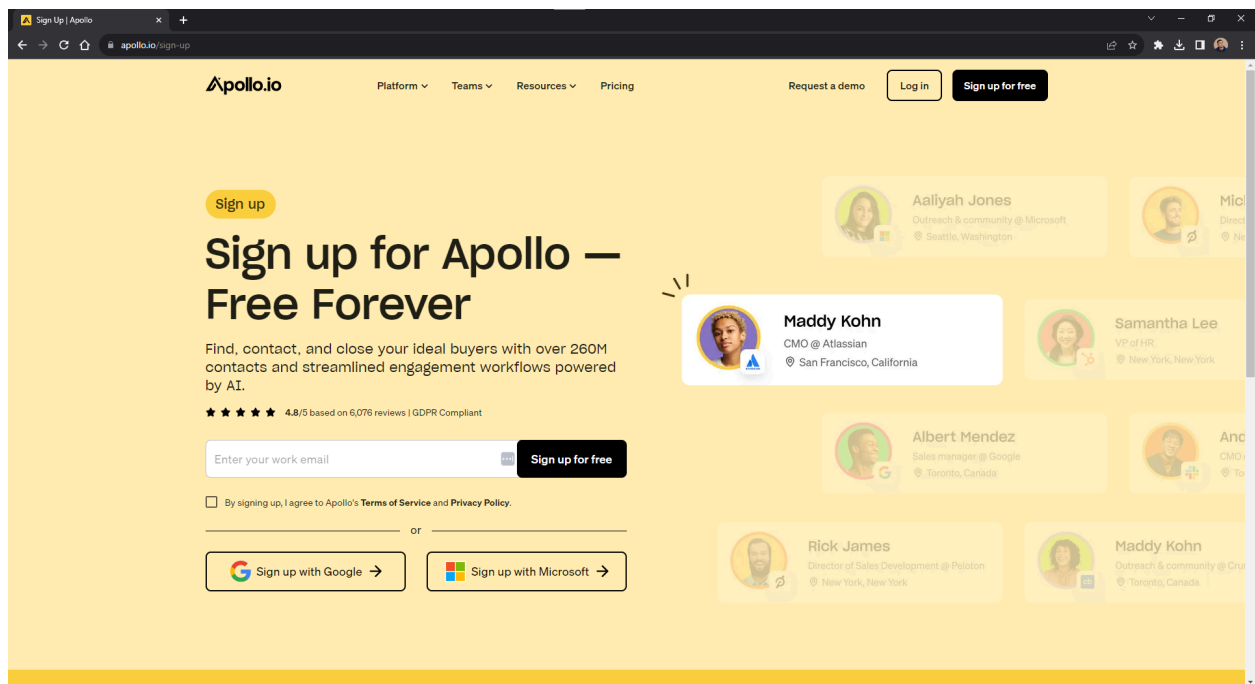
LastPass logins were provided by Jeff via shared folder using calvin@uplevelsolutions.com account for these specific applications:

- Airgram

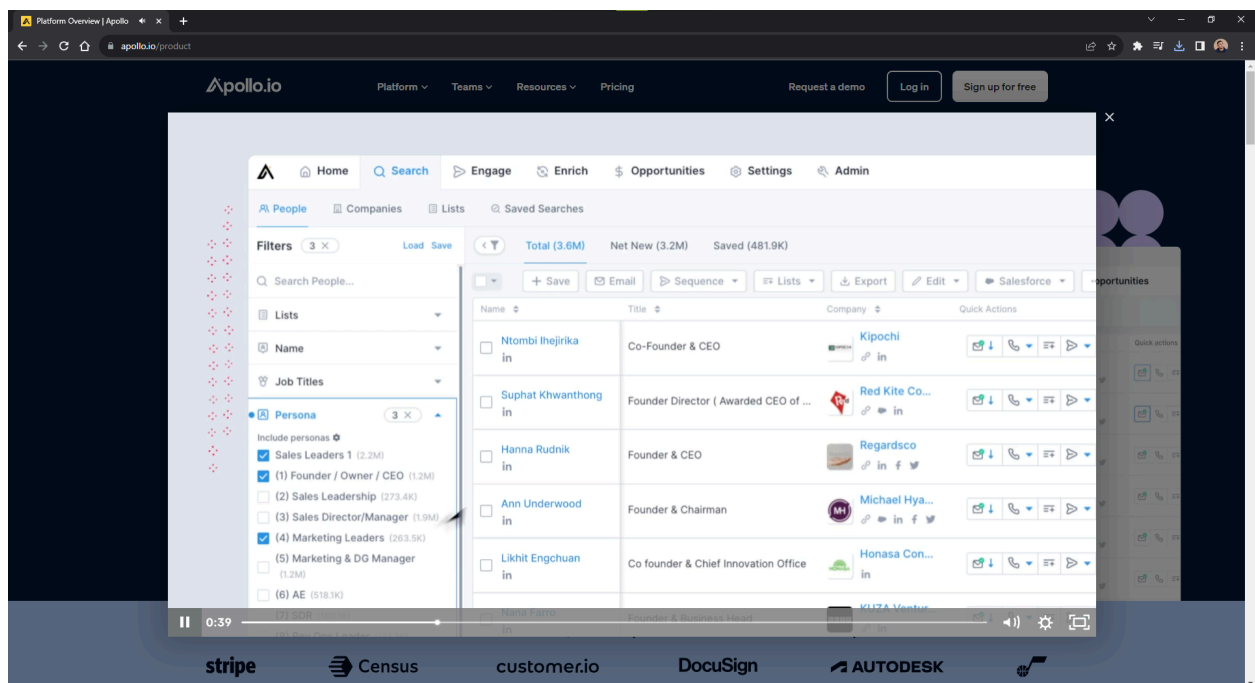
TASK #1

Apollo

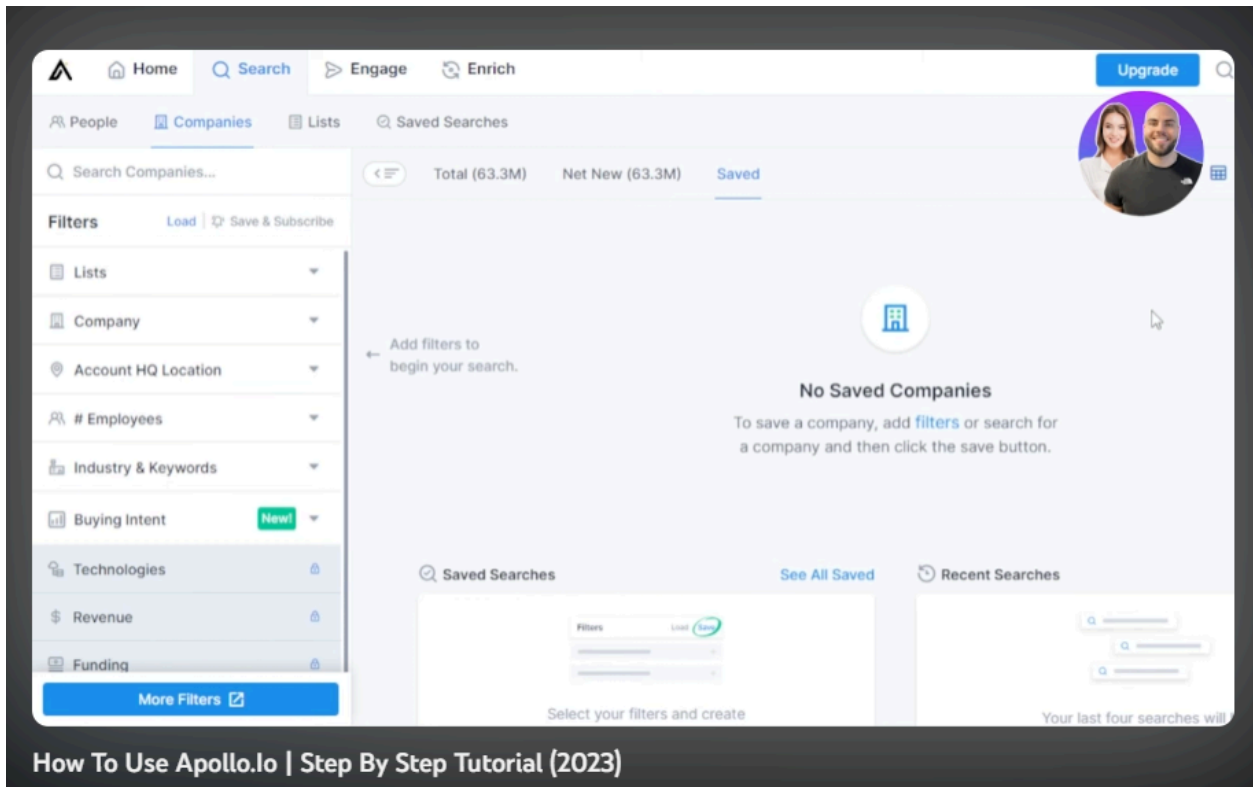
Go to [Apollo.io](https://apollo.io) and sign up for an account



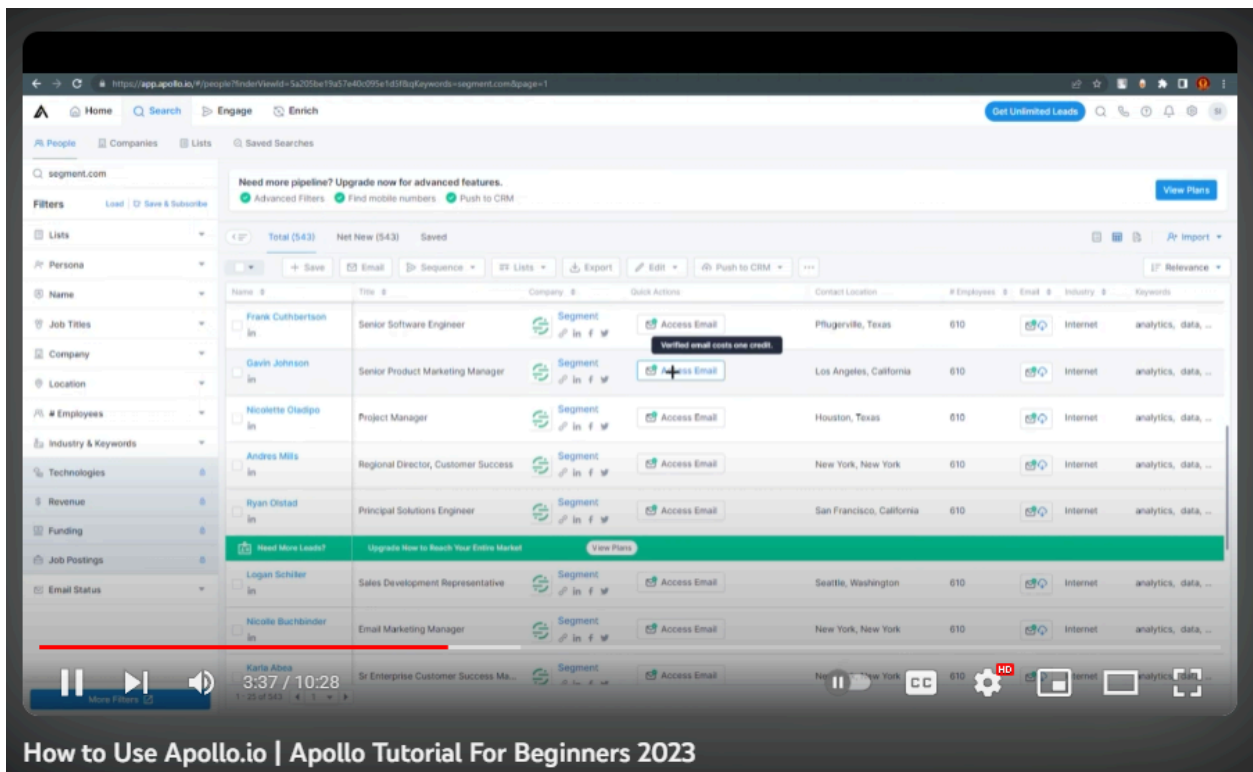
Watched the platform overview video to get acquainted



While I am waiting for the login credentials from our client, I consider to watch tutorials on YouTube



[Tutorial 1](#)



[Tutorial 2](#)

Copper

Airgram

Login using LastPass account calvin@uplevelsolutions.com and you can find Jeff's logins in a shared folder named Uplevel Solutions

Jeff's login credentials are automatically registered in LastPass vault, it will appear as you click in the username and password fields

Otter

LinkedIn Sales Navigator

OTHER PROCEDURES & PROCESSES

Tasks specific to the usage of Apollo that will be provided by our client will be used and implemented

END OF DAY & END OF WEEK REPORT

Recipient: Uplevel Solutions email address, cc: metchell@uplevelsolutions.com

[END OF DAY REPORTS](#)

[END OF WEEK SUMMARY REPORTS](#)