

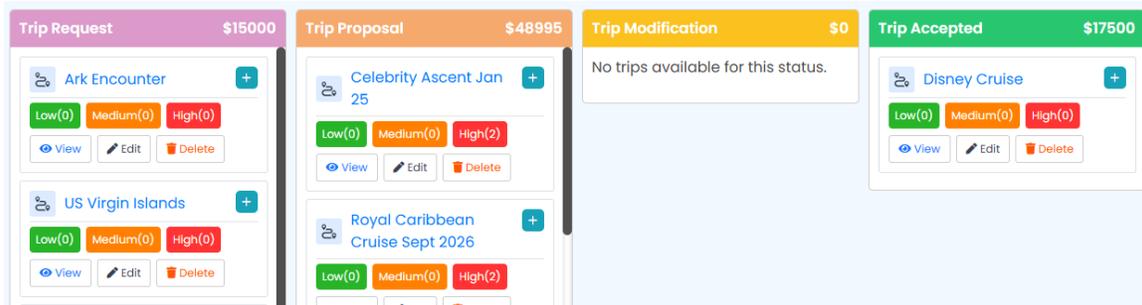
TA Trip Tracker – Managing the Pre-Booked Pipeline

The Pre-Booked Pipeline is where every trip begins. This pipeline tracks trips that are still in the planning and proposal stage before any bookings are confirmed. It helps travel advisors manage client inquiries, organize proposals, track revisions, and move travelers toward booking.

Pre-Booked Pipeline Overview

The Pre-Booked pipeline is fully manual. Advisors move trips between stages as the sales process progresses by dragging the trip card to another stage or by updating the status inside the trip record.

Example of the Pre-Booked Pipeline:



Pipeline Stages

- Trip Request
- Trip Proposal
- Trip Modification
- Trip Accepted
- Trip Lost

Trip Request

A Trip Request represents a new travel inquiry. This stage is used when a traveler first contacts you about planning a trip. Advisors can create the request themselves or use the Trip Request Link and clients can request a trip.

Trip Proposal

The Trip Proposal stage means you have presented travel options to the traveler and they are reviewing the proposal.

Trip Modification

This stage is used when the traveler requests changes to the original proposal.

Trip Accepted

The Trip Accepted stage means the traveler has approved the proposal and you are ready to begin booking the trip.

Trip Lost

The Trip Lost stage is used when a traveler decides not to move forward with the trip.

Best Practices

- Enter every inquiry as a Trip Request
- Follow up regularly on proposals
- Move trips as the traveler makes decisions
- Use Trip Lost for proposals that do not convert