



## TA Trip Tracker – Adding a Traveler

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Traveler profiles store important client information inside TA Trip Tracker. Adding travelers allows you to keep contact details, notes, and trip history organized so you can easily manage your clients and plan future trips.

### **Step 1 – Open the Travelers Section**

From the Agency Dashboard or the left-side navigation menu, click on 'Travelers'. This will open the traveler management area where all client profiles are stored.

### **Step 2 – Click Add Traveler**

Click the 'Add Traveler' button. This will open the traveler profile form where you can enter the traveler's information.

### **Step 3 – Enter Traveler Information**

You can enter as much or as little information as you want when creating a traveler profile. Information can always be updated later.

- Full Name
- Email Address
- Phone Number
- Address
- Notes about preferences

### **Step 4 – Save the Traveler Profile**

Once you have entered the traveler's information, click Save. The traveler profile will now appear in your traveler list and can be selected when creating or managing trips.

## **Best Practices**

- Add travelers as soon as you begin planning a trip
- Keep traveler contact information updated
- Use notes to record travel preferences
- Review traveler profiles before planning future trips

## **Why Traveler Profiles Matter**

Well-organized traveler profiles help you deliver better service. By keeping contact information and travel notes in one place, TA Trip Tracker makes it easier to personalize trips and build long-term client relationships.