TA Trip Tracker – Agency Users

Agency Users allows administrators to manage the team members who have access to TA Trip Tracker. This section is used to add new users, update user information, and manage which advisors can access the system.

Accessing Agency Users

Administrators can access the Agency Users section from the Tools & Settings area of the system. This section displays all users associated with the agency account.

Adding a New User

To add a new team member, open the Agency Users section and select the option to add a user. Enter the required information and save the user record.

Typical information entered when creating a user includes:

• User name

• Email address

• Role or permission level

• Contact information (if applicable)

Editing a User

User records can be edited at any time. Administrators may update contact information, adjust permissions, or modify other user settings as needed.

Deactivating a User

If a team member no longer needs access to TA Trip Tracker, their account can be deactivated. Deactivating a user prevents system access while preserving historical records related to that advisor.

Best Practices

• Only grant system access to active team members

• Assign appropriate roles and permissions when creating users

• Deactivate users who no longer require access

• Review user access periodically to ensure accuracy

Why User Management Matters

Managing agency users ensures that the right people have access to the system while maintaining proper security and organization. TA Trip Tracker makes it easy for administrators to control access and keep team records up to date.