



## TA Trip Tracker – Assigning & Updating Tasks

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Tasks can be assigned, updated, and managed to help travel advisors stay organized and ensure important actions are completed. Assigning tasks allows teams to collaborate effectively and ensures responsibilities are clearly defined.

### **Assigning a Task**

When creating or editing a task, you can assign it to yourself or to another agent within your organization.

- Open the Tasks section.
- Create a new task or open an existing task.
- Select the agent responsible for completing the task.
- Save the task.

### **Updating a Task**

Tasks can be updated at any time as work progresses. Keeping tasks updated helps ensure your task list reflects current priorities.

- Change the assigned agent
- Update the due date
- Modify the task description
- Change the task category
- Adjust the priority level

## **Tracking Task Progress**

As tasks are completed or priorities change, update the task details to reflect the current status. This keeps your workflow organized and ensures nothing is overlooked.

## **Collaboration with Tasks**

In agencies with multiple advisors, assigning tasks helps distribute responsibilities and improve communication. Each agent can clearly see which tasks they are responsible for completing.

## **Best Practices**

- Assign tasks to the appropriate team member
- Use due dates to track deadlines
- Update tasks as progress is made
- Review tasks regularly to stay organized

## **Why Task Assignment Matters**

Clear task assignment ensures accountability and helps teams stay organized. By assigning responsibilities and tracking progress, TA Trip Tracker helps travel advisors manage their workload efficiently.