



TA Trip Tracker – Managing Tasks

Tasks help travel advisors stay organized and keep track of important actions related to trips and clients. The Tasks feature allows you to create reminders, assign tasks to agents, track priorities, and manage due dates so nothing falls through the cracks.

Accessing Tasks

You can access Tasks from the Agency Dashboard or from the left-side navigation menu. This will open the task management area where all tasks are displayed.

Task Views

Tasks can be displayed in two different formats depending on how you prefer to manage your work.

- Column View – Tasks are organized by priority or status in columns.
- List View – Tasks are displayed in a simple list format.

Creating a Task

To create a new task, open the Tasks section and select the option to add a task. Enter the task details and save.

Typical task details include:

- Task title or description
- Assigned agent
- Due date
- Task category
- Priority level

- Additional notes

Editing a Task

Tasks can be edited at any time. You can update the assigned agent, due date, status, category, or other task details.

Assigning Tasks

Tasks can be assigned to yourself or to other agents within your organization. This makes it easy to collaborate and ensure responsibilities are clearly defined.

Automatic Tasks

Some tasks may be automatically created by the system as part of workflows. These automated tasks help ensure important actions related to trips are not missed.

Best Practices

- Use tasks to track follow-ups with clients
- Assign due dates to keep work organized
- Use task categories to group similar tasks
- Review tasks regularly to stay on schedule

Why Tasks Matter

Using tasks helps travel advisors stay organized and manage their workload more efficiently. By tracking important actions and deadlines, TA Trip Tracker helps ensure that no client request or trip detail is forgotten.