



TA Trip Tracker – Managing Travelers

Travelers are your client profiles inside TA Trip Tracker. Each traveler record stores important client information such as contact details, notes, and trip history. Keeping traveler profiles organized helps advisors manage client relationships and quickly reference important information when planning trips.

Accessing Travelers

You can access the Travelers section from the Agency Dashboard or from the left-side navigation menu. This area displays all traveler profiles associated with your account.

Searching for a Traveler

The search bar allows you to quickly find a traveler by typing any of the following:

- Traveler name
- Email address
- Phone number
- Other contact information

Adding a New Traveler

To add a new traveler, click the 'Add Traveler' button and enter the traveler's information. You can add as much or as little information as you wish and update the profile later.

Typical traveler information may include:

- Full name
- Email address
- Phone number
- Address

- Preferences
- Travel Party
- Documents
- Loyalty Numbers (coming soon_
- Notes

Updating Traveler Information

Traveler profiles can be updated anytime. Simply open the traveler record and edit the fields you want to update. Keeping profiles current ensures accurate contact information and helps advisors provide personalized service.

Exporting Travelers

TA Trip Tracker allows you to export traveler records into a spreadsheet. This feature can be helpful for reviewing your client list, creating reports, or importing data into other systems.

Why Traveler Profiles Matter

Organized traveler profiles help advisors build stronger client relationships. By keeping contact details, notes, and travel history in one place, TA Trip Tracker makes it easy to personalize service and plan future trips.

Travelers will be updated soon to a cleaner dashboard.