# TA Trip Tracker – Get Started in 5 Minutes

This quick guide will help you understand the basic workflow of TA Trip Tracker so you can begin organizing trips, managing clients, and staying on top of important milestones right away.

## Step 1 – Start With a Trip or a Traveler

You can begin using TA Trip Tracker in two different ways depending on your workflow.

### Option 1 – Create a Trip First (Recommended)

Many advisors find it easiest to begin by creating a Trip Request. This allows you to capture the client inquiry immediately and add traveler details during the process.

• Click 'Add Trip'

• Enter the basic trip request details

• Add the Lead Traveler

• Add additional travelers if needed

• Save the trip

### Option 2 – Add Travelers First

You can also create traveler profiles first and then select them when creating trips.

• Open the Travelers section

• Click 'Add Traveler'

• Enter traveler information

• Save the traveler profile

## Step 2 – Use the Pre-Booked Pipeline

New trip inquiries begin in the Pre-Booked Pipeline where you manage the planning and proposal process.

• Trip Request – A new client inquiry

• Trip Proposal – Options have been presented

• Trip Modification – Client requested changes

• Trip Accepted – Client approved the proposal

Once bookings are confirmed with suppliers, move the trip to the Booked Trips Pipeline.

## Step 3 – Let Automation Handle Key Milestones

After a trip is booked, TA Trip Tracker automatically manages important travel milestones.

• Final Payment reminders

• Trip Review preparation

• Bon Voyage stage before departure

• Post-travel follow-ups

Automation is triggered by three important dates:

• Final Payment Date

• Trip Start Date

• Trip End Date

## Step 4 – Use Tasks to Stay Organized

• Follow up on proposals

• Confirm final payments

• Send travel documents

• Check in with clients before departure

## Step 5 – Review Your Dashboard

The dashboard provides a snapshot of your trips, tasks, and upcoming travel activity. Reviewing it regularly helps you stay organized and identify what needs attention.

## Helpful Tips

- Capture trip inquiries as soon as they arrive
- Keep traveler profiles updated
- Enter accurate trip dates for automation
- Use tasks to track follow-ups
- Review pipelines regularly

## You're Ready to Start!

You now understand the basic workflow of TA Trip Tracker. For more detailed instructions on each feature, visit the TA Trip Tracker Help Center.