



TA Trip Tracker – Traveler Profiles & Documents

Traveler profiles store important information about your clients. These profiles allow you to keep contact details, notes, and related documents organized in one place so you can quickly reference them when planning trips or assisting travelers.

Accessing a Traveler Profile

To view a traveler profile, open the Travelers section from the Agency Dashboard or the left-side navigation menu. Then click on the traveler's name to open their profile.

Editing Traveler Information

Traveler profiles can be updated at any time. Simply open the profile and edit any fields that need to be updated.

Information that may be stored in a traveler profile includes:

- Full name
- Email address
- Phone number
- Address
- Travel preferences
- Notes

Traveler Preferences

The preferences section allows advisors to keep track of useful client information such as preferred destinations, favorite suppliers, and more. These preferences help personalize future travel experiences.

Traveler Documents

Traveler documents can be uploaded directly to the traveler profile. This keeps important files organized and easily accessible.

Examples of documents that may be stored include:

- Passport copies
- Travel insurance documents
- Authorization forms
- Client agreements
- Other traveler-specific paperwork

How Traveler Profiles Connect to Trips

When creating a trip, you will select a Lead Traveler from your traveler list. Any additional travelers can also be linked to the trip. This connection allows TA Trip Tracker to organize trips by client and maintain a clear travel history.

Best Practices

- Keep traveler contact information updated
- Use preferences to record preferences and important details
- Upload important documents to the traveler profile
- Review traveler profiles before planning future trips

Why Traveler Profiles Matter

Well-maintained traveler profiles make it easier to deliver exceptional service. By storing client information, notes, and documents in one place, TA Trip Tracker helps travel advisors stay organized and create more personalized travel experiences.