



TRIPS

Companions and relationships

Link spouses, kids, parents, friends, and travel partners between contacts in Trips. How mirrored pairs work, how to add and remove them, and where they show up.

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In Trips, every person is a top-level contact — there's no "child of" or "spouse of" parent record. Relationships are links between two equal contacts, mirrored so the connection shows up on either contact's drawer.

ADVISOR TIP

Coming from another CRM? TravelJoy and Tern attach companions to a primary contact. Trips doesn't — Sarah is her own contact whether you're looking at her or at her spouse Tom. That lets Sarah travel with Tom on family trips and with her sister on a girls' weekend without any data wrangling.

The Companions tab

Open any contact (from `/contacts` or from anywhere a contact name links to the drawer) and click the **Companions** tab. You'll see two things: an **Add companion** composer at the top, and a list of everyone already linked to this contact below it.

Clicking any linked companion's row swaps the drawer to that contact — same drawer, different person. Use it to bounce between a couple or a family without leaving the panel.

Adding a companion

Companions are always existing contacts in your org. The composer searches your contacts; if the person you need isn't in Trips yet, you create them first and then come back to link.

1. In the **Find a contact** field, type at least two characters of a name or email. Results appear in a dropdown.
2. Click a result. The selected contact appears in a confirmation chip with a **Clear** button if you picked the wrong one.

3. Pick the **Relationship** from the dropdown — Spouse, Partner, Child, Parent, Sibling, Friend, Business partner, or Other.
4. Optionally add a **Label** (up to 80 characters) — handy for things like *"Eldest daughter"* or *"Travel buddy"*. Strongly recommended when you pick **Other** since the relationship name alone won't describe what they are to each other.
5. Click **Link companion**. The relationship saves and immediately appears in the list below.

ADVISOR TIP

No match? Add the contact first. If your typeahead returns nothing, the empty-state shows an **Add a new contact** link that opens the new-contact drawer. Save the new contact, then re-open the primary contact's drawer and link them — the new person will show up in the typeahead now.

Supported relationship kinds

Trips ships eight relationship kinds. They're curated on purpose — a fixed list keeps reports and future segmentation predictable. If none fit, use **Other** and describe the relationship in the Label.

Symmetric

- **Spouse** — both sides labeled Spouse.
- **Partner** — both sides labeled Partner.
- **Sibling** — both sides labeled Sibling.
- **Friend** — both sides labeled Friend.
- **Business partner** — both sides labeled Business partner.
- **Other** — both sides labeled Other.

Asymmetric (auto-flipped)

- **Parent** on one side becomes **Child** on the other.
- **Child** on one side becomes **Parent** on the other.

Pick the kind from the perspective of the contact whose drawer you're in. If you're on Tom's drawer adding his daughter Emma, pick **Child**. When you open Emma's drawer, you'll see Tom listed as **Parent** automatically.

How the mirror works

Each link is stored on both contacts. That's deliberate: it means opening either Tom's drawer or Sarah's drawer shows the companion straight away — you don't have to remember who you added first, and the list stays accurate from both directions.

The mirror is automatic. You add Tom → Spouse → Sarah on Tom's drawer, and Sarah → Spouse → Tom appears on Sarah's drawer the next time you open it. The Label field copies to both sides as well.

ADVISOR TIP

Re-linking updates instead of duplicating. If you add the same companion twice with a different relationship or label (say, you changed your mind and a **Friend** is actually a **Partner**), Trips updates the existing link rather than creating a duplicate. There's only ever one link between any two contacts.

Removing a companion

On the Companions tab, find the row you want to remove and click the unlink icon on the right. A small **Unlink?** prompt appears with **Yes** and **No** buttons inline — no separate modal, no scroll. Click **Yes** to confirm.

Removing a link drops both mirror rows. Neither side will see the other in their Companions tab after that. The contacts themselves stay — you're only deleting the link, never the people.

ADVISOR TIP

Archiving a contact does not drop their relationships. Archive is a reversible hide — the contact stays on file, just out of your active list, and their companion links stay intact. Only a permanent delete (from the archived view) clears the links. So if you archive Tom and later restore him, Sarah's Companions tab still has him linked.

What companions do NOT do (yet)

A few things to set expectations on — these are common asks but they're not how Trips currently behaves:

- **Trip travelers are independent.** Linking Sarah as Tom's spouse does not auto-add her to a trip when you add Tom. Add each traveler explicitly on the trip — companions are a contact-level relationship, not a trip-level shortcut.
 - **The client portal doesn't show relationships.** Companions are an internal-CRM concept right now. When a client logs into the portal they see their own profile, trips, files, and messages — they don't see who's linked to them.
 - **No age calculation.** The companion row shows the date of birth from Core when one is on file, but Trips doesn't compute an age. If you need to know how old a child is, do the math from the DOB shown.
 - **Emergency contact is a separate field.** The "Emergency contact" on the contact drawer is its own free-text block (name, phone, email, relationship-as-text). It is not the same as a Companion link and the two don't auto-sync.
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Troubleshooting

I added a relationship on Tom but Sarah's Companions tab is empty.

Close Sarah's drawer if it was already open and reopen it. The mirror row is written immediately when you click **Link companion** on Tom's side, but Sarah's drawer caches its data on first open. A fresh open pulls the latest list.

The typeahead returns no results even though I know the contact exists.

Three things to check: (1) you typed at least two characters — single-letter queries return nothing on purpose, (2) the other contact is in the same organization (Trips is org-scoped end-to-end), and (3) the other contact isn't already linked or isn't the primary themselves — those are excluded automatically. If all three pass and you still see nothing, try a different fragment of the name or the email.

I picked the wrong relationship kind. Do I have to unlink and re-add?

No. Add the same companion again with the correct kind — the system recognizes the existing pair and updates it instead of erroring. The Label updates the same way.

Can a child be linked to two parents?

Yes. Each parent-child link is a separate pair. Add Emma as Tom's child on Tom's drawer, then add Emma as Sarah's child on Sarah's drawer. Emma's Companions tab will show both Tom and Sarah, each labeled **Parent**. Same pattern works for blended families, guardians, or any other multi-parent setup.

Related

- [Contacts in Trips](#)
- [Trips — Getting Started](#)
- [What is a trip?](#)
- [The Trip page, top to bottom](#)