URTRAVELPRO

TRIPS

Contacts in Trips

How contacts work in Trips: the split between Core identity and Trips-owned travel data, the contact drawer's tabs, the find-or-create dedup flow on add, and how contacts become travelers on a trip.

Prepared by System Generated · June 10, 2026

On this page

A **contact** is a person your agency works with — a client, a spouse, a kid, a referral source. Contacts are the backbone of everything else in Trips: every trip has at least one traveler, every invoice is sent to someone, every portal account belongs to a contact. This article covers how they're structured, how to add them without creating duplicates, and what lives on each tab of the contact drawer.

Where contact data actually lives

Trips contacts are split across two systems, and knowing which is which makes everything else click into place.

Core owns identity

Your UrTravelPro account, sometimes called your *Core* account, is the platform-wide source of truth for **who a person is**. That includes first / middle / last name, suffix, email, phone, address, date of birth, and anniversary date.

Anyone in your agency working in Trips, Marketing, or Books sees the same person.

Trips owns travel data

Trips stores the rich CRM layer: travel preferences, passport details and scans, loyalty programs, emergency contact, dietary restrictions, trusted-traveler numbers, custom fields, notes, and which trips they're a traveler on.

None of that is shared with Marketing or Books — it's yours.

ADVISOR TIP

Contacts are per-organization. Each agency has its own contact roster. If you're a host running multiple sub-agencies in separate UrTravelPro orgs, each org has its own contacts — they don't bleed across.

The contact drawer

There are no separate `show` / `edit` / `create` pages for contacts. Everything happens in a single right-side drawer that slides over the page you're on. Open it from:

- **Contacts → click any row** (view + edit mode)
- **Contacts → + New contact** (new mode, empty form)
- Anywhere a contact appears with a clickable name — the trip travelers strip, search results, the invoice recipient picker

The drawer has these tabs along the top:

- **Contact info** — identity (name, email, phone, address, DOB, anniversary) and company name. Identity fields proxy to Core when you save; company name lives on Trips.
- **Companions** — household and relationship links. Covered in the separate Contact Relationships article.
- **Loyalty programs** — airline, hotel, cruise line, car rental, and other program memberships. One row per program.
- **Travel preferences** — preferred airline / hotel chain / car rental, seat and meal preference, special meal notes, accessibility needs, dietary restrictions.
- **Passport** — passport number, country, expiry, issued date, place of birth, issuing authority, type, gender, plus trusted-traveler IDs (TSA Known Traveler, TSA Redress, Global Entry) and encrypted passport scan uploads.
- **Emergency contact** — name, relationship, phone, email. One per contact.
- **Payment** — preferred payment method label and company name (for invoice billing context).
- **Notes** — internal notes. Mark important to pin; mark private to hide from teammates with lower roles.
- **Trips** — every trip this contact is a traveler on, with status and dates.
- **Marketing** — marketing consent state.
- **Custom** — your agency-defined custom fields (see **Settings → Custom contact fields** to create them).
- **Portal access** — magic-link invite state, last login, and disable / re-enable controls.

Each tab has its own **Save** button. Saving on the Passport tab won't touch anything on Preferences. This keeps the form forgiving — you can fill in what you have and come back later.

Adding a contact (and the dedup check)

From **/contacts** click **+ New contact**. The drawer opens in new-contact mode with an empty Contact info form. The minimum required is first name + last name; everything else is optional but helpful — especially email or date of birth, which is what makes the dedup check work.

When you click **Save**, Trips first asks Core: *"Do you already know someone with this email, or this name + DOB combination, in this organization?"* If Core says yes, Trips pops up a modal before creating a duplicate.

"You may already have this person"

Shown when at least one match is already a Trips contact in your org. Pick **Open existing** to jump to the existing row, or **Create new anyway** if it's genuinely a different person. **Cancel** closes the modal without saving anything.

"This person is on file in another app"

Shown when Core has a matching identity from Marketing or Books but no Trips contact yet. Pick **Link to this** to bind a fresh Trips row to that existing identity — your existing email history, Marketing audience membership, etc. stays attached to the same person.

ADVISOR TIP

When to "Create new anyway." Households share an email (mom's email on file for her teenager). The dedup modal flags it; if you supply a different name + date of birth, Trips will mint a brand-new identity for the second person. The shared email stays attached to whoever it belonged to first.

How contacts attach to trips

A contact becomes a **traveler** the moment they're added to a trip. From the trip detail page, the **Travelers** strip near the top has a picker — start typing a name or email, pick from the dropdown, and they're on the trip. You can also click **+ Add new traveler** to spawn the contact drawer in *inline-add* mode, fill in the form, and the freshly-created contact pops onto the traveler list without a page reload.

One traveler per trip is marked **primary** — that's the one most surfaces default to (the portal greeting, the invoice "Bill to" line, the messages thread). You can change which traveler is primary at any time from the trip's travelers strip.

Contacts and trips have a many-to-many relationship: one contact can be on many trips (Mrs. Smith's annual Cancún trip plus the family Disney trip), and one trip can have many travelers. The drawer's **Trips** tab shows every trip a given contact is on, newest first.

Archiving, restoring, and deleting

Contacts have three states:

- **Active** — shows up in the main contacts list, search, traveler pickers, everywhere.
- **Archived** — hidden from the main list and pickers but everything they're linked to (trips, invoices, messages) stays intact. Reachable by switching the contacts page to the **Archived** tab. Archiving a contact also auto-disables their portal account.
- **Deleted** — permanent. Only available from the archived view, and only when nothing references the contact. If they're still on a trip, linked as a companion, in a message thread, or attached to a form submission, you'll be told what to clean up first.

ADVISOR TIP

Prefer archive over delete. Archive is reversible in one click; delete also removes the Core identity record, which means Marketing and Books lose the same person. Unless the contact was a typo or test row, archive.

The UUID bridge (and why you don't touch it)

Under the hood, every Trips contact carries a `core_contact_uuid` — Core's permanent ID for that person. You never see it in the UI, and that's deliberate. Trips refuses to accept a UUID from any direction except its own verified create / dedup flow.

IMPORTANT

Never paste UUIDs around manually. There's no UI to do this anyway, and the rare support-ticket workflow that needs to re-bind a contact's identity goes through a guarded admin tool that round-trips Core to verify. This is what guarantees that "Jessica's contact row" can never silently point at "Chris's identity" — a real bug we hit before this guard existed.

Practical takeaway: the find-or-create dedup modal is the only "is this the same person?" decision you'll ever make. Everything downstream just works.

Troubleshooting

The dedup modal isn't firing when I know there's a duplicate.

Dedup runs on **email** or **first name + last name + date of birth**. If you're only typing a name with no email and no DOB, Core has no deterministic key to match on and will let the create through. Add either the email or the DOB before clicking Save and the modal will surface the match.

I edited the contact's email but Marketing still has the old one.

Identity (name, email, phone, address, DOB, anniversary) is owned by Core, and the change should propagate to every app that uses that identity. If Marketing hasn't caught up, give it a minute and refresh — and if it still hasn't, the contact in Marketing may have been imported separately before Trips linked them. Open a support ticket and we'll trace the link.

I can't delete a contact — it says "still linked to N trips."

Delete is blocked when the contact is referenced by trips, relationships, messages, or form submissions. The error message lists exactly what's holding them. Two choices: remove them from each trip / thread first, or just **Archive** instead — which is what we'd recommend for any contact with real history.

Where do I create custom fields like "T-shirt size" or "Frequent diet"?

At **Settings** → **Custom contact fields**. Definitions made there appear on every contact's **Custom** tab as inputs. The deep-dive on custom field types (text, date, choice, multi-choice) lives in its own help article.

Related

- Trips — Getting Started
- Contact relationships and companions
- What is a trip?
- Passport collection and scans