



TRIPS

Todo templates

How to build a reusable checklist of tasks in Settings → Todo templates and apply it to a trip in one click. Covers what a template item carries — due offsets, assignee placeholders, reminders, optional email automation — and what changes when you edit a task after applying.

On this page

- [Where templates live](#)
- [What a template holds](#)
 - [Per-template](#)
 - [Per item](#)
- [Assignee placeholders](#)
- [Reminder anchors on a template](#)
- [Applying a template to a trip](#)
- [Editing a task after applying](#)
- [Related](#)

A todo template is a named, reusable checklist of tasks you can drop onto any trip in one click. Build one for your pre-trip prep, your post-trip follow-up, your cruise checklist — then apply it from the trip's Tasks tab and Trips materializes every item as a real, editable todo on that trip.

ADVISOR TIP

Templates are the highest-leverage setup move in Trips. Five minutes building a "Cruise prep" template saves you the same five minutes on every cruise booking forever. The templates page is the first place we send agencies that ask "how do I stop doing the same thing on every trip?".

Where templates live

Templates are managed at **Settings** → **Todo templates** (/settings/todo-templates). The index lists every template in your agency — active ones first, then any inactive ones. Click a row to edit; click **+ New template** to start one from scratch.

Templates are scoped to your agency. Other agencies on the platform can't see yours, and you can't see theirs.

What a template holds

Each template has a name, an optional description, and an active/inactive toggle. The real content is the **items** — the individual tasks the template will create when you apply it.

Per-template

- **Name** — required, up to 160 characters. Shown in the Apply-template menu on every trip's Tasks tab.

Per item

- **Label** — the task text. Required.
- **Notes** — optional longer description. Carried to the materialized todo.

- **Description** — optional one-liner. Shown as the gray subtitle in the menu so you can disambiguate similar templates at a glance.
- **Active** — only active templates appear in the apply menu. Toggle off when retiring a template without deleting it.
- **Due offset days** — days relative to the trip's start date. Negative numbers mean "before"; positive numbers mean "after".
- **Client-visible** — flag tasks the traveler should see on the portal (e.g. "Upload your passport scan").
- **Reminder** — optional anchor + offset + time-of-day.
- **Assignee placeholders** — who the task gets assigned to once applied.
- **Email automation** — optional reminder email the system sends.

Assignee placeholders

A template can't name specific people — the same template applies across many trips with different travelers and staff. Instead you pick from four placeholder roles, and Trips resolves them at apply time:

- **Agent** — the staff user who created the trip.
- **Primary traveler** — the contact flagged primary on the trip.
- **All travelers** — every contact on the trip.
- **All agents** — every staff user in your agency.

Reminder anchors on a template

Templates support three of the four trip-todo reminder anchors. Each item can carry one:

- **Days from today** — fires X days after the agent applies the template (good for "follow up in 7 days").
- **Days before trip start** — fires X days before the trip's start date.
- **Days after trip end** — fires X days after the trip's end date.

ADVISOR TIP

Why no absolute-date anchor? A specific date like "Aug 1, 2026" doesn't generalize across trips. Templates only carry the three relative anchors. If you need an absolute reminder, set it on the materialized todo after applying.

Applying a template to a trip

1. Open the trip and click the **Tasks** tab.
2. Click **Apply template** at the top right. The menu lists every active template in your agency.
3. Pick a template. The page reloads with every item from the template added as a fresh todo.

Each materialized todo gets its due date computed from the trip's start date + the item's offset. If the trip has no start date yet, the todo lands with no due date — fill it in by hand later. Reminders are resolved the same way: anchor + offset + the trip's dates produces a concrete **reminder_at** moment.

ADVISOR TIP

Apply the same template more than once and you get duplicates. Trips doesn't de-dupe — if you apply "Cruise prep" twice, you get two copies of every task. Useful for a template that genuinely repeats (a weekly check-in), and easy to clean up if you applied the wrong one by mistake.

Editing a task after applying

A materialized todo remembers which template it came from (the row's `from_template_id`), but it's otherwise fully independent. Edit the label, change assignees, move the due date, complete or delete it — none of that touches the template. The template is the cookie cutter, not the cookie.

Conversely, editing the template later does not propagate to already-applied tasks. The next time you apply the template, the new items show up; the old ones on previous trips stay as-is.

Related

- [Trip todos + reminders](#)
- [Email templates](#)
- [The Trip page, top to bottom](#)