



TRIPS

Trip todos + reminders

Add, assign, and remind on trip-level tasks. Covers the four reminder anchors (absolute, days-from-today, days-before-start, days-after-end), staff + traveler assignees, client-visible tasks on the portal, the pending-review handshake, and how reminder emails fire.

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The **Tasks** tab on a trip is where every actionable item for that trip lives — staff prep work, traveler to-dos, deadlines, follow-ups. Each task can carry a due date, a reminder, assignees on either side of the agent/traveler line, and an optional automation email that fires when the reminder fires.

ADVISOR TIP

Apply a template first. If you find yourself typing the same five tasks on every cruise booking, save them as a [Todo template](#) once and apply the whole list in one click forever after.

Adding a task

1. Open the trip and click the **Tasks** tab.
2. Click **Add task**. The editor modal opens.
3. Fill in the label (required, up to 200 characters), optional notes, optional due date, optional reminder, and assignees. Click **Save**.

Tasks save instantly via JSON — no page reload. They appear in the tab list immediately, ordered by due date with undated items at the bottom.

Assignees

Each task can be assigned to any combination of staff users and travelers — up to 20 of each.

Staff

Pick from your agency's team. Newly-assigned teammates get an in-app bell notification immediately ("you were assigned a task"). You're never pinged for tasks you assigned to yourself.

Travelers

Pick from the trip's contacts. Useful for client-side tasks like "Send us your passport scan" or "Confirm dinner preferences" — pair this with the **Client-visible** toggle so the traveler sees the task in their portal.

Reminders — the four anchors

A task's reminder is a date + time + an anchor type. Trips supports four anchors; pick whichever fits how you think about the task:

- **Absolute date** — fire on a specific calendar date. "Confirm cabin: July 1, 2026, 9:00 AM."
- **Days from today** — fire X days after you create the task. "Follow up in 7 days."
- **Days before trip start** — fire X days before the trip's start date. "Welcome packet: 14 days before departure."
- **Days after trip end** — fire X days after the trip's end date. "Send review request: 5 days after they return."

The time-of-day input (HH:MM) is interpreted in the time zone of the browser that created the task. If your team is spread across time zones, set the reminder from the device of whoever you want to anchor the wall-clock time to.

ADVISOR TIP

Edit the trip's start or end date and relative reminders recompute automatically. A task pinned to "14 days before trip start" will move with the trip if you shift the dates. Absolute-date reminders are immune — they fire on the literal date no matter what happens to the trip.

Who gets the reminder email

When a reminder fires, the recipients are resolved from the task's assignees. Both sides get email:

- Staff assignees get the reminder at their staff email.
- Traveler assignees get the reminder at the contact's email.

The reminder uses a sensible default subject and body unless you attached an automation (see below) — in which case the automation's subject, body, and template take over.

Email automation on a task

An optional automation lets you attach a specific email template to a task. When the reminder fires, the automation sends that email — with merge fields resolved — to the recipient bucket you chose.

1. Open the task editor and find the **Automation** section.
2. Pick recipients (primary traveler, all travelers, a specific contact, freeform email addresses, or any combination).
3. Either pick an existing [email template](#) OR write an inline subject + body.
4. Save the task.

Automations fire once, at the same moment the standard reminder fires. The audit trail records the recipients and the moment it sent.

Client-visible tasks on the portal

Flip a task's **Client-visible** toggle and it shows up under **Your tasks** on the client portal — open items at the top, completed items collapsed beneath. The traveler can check the task off themselves.

Client check-offs aren't marked done outright. They land as **pending review** — a yellow-bordered row in your Tasks tab — until an agent clicks **Confirm** (now done) or **Reopen** (kick it back to the client). The audit shows BOTH who checked it and who confirmed it.

ADVISOR TIP

Pair client-visible with a traveler assignee + an automation. A "Send us your passport scan" task assigned to the traveler, marked client-visible, with a friendly reminder email 30 days before departure — that's the whole "are we ready?" workflow in one task.

Completing, reopening, deleting

- **Toggle complete** — click the checkbox on the row. Stamps `completed_by_user_id` or `completed_by_contact_id` depending on who clicked it.
- **Uncomplete** — click the checked box again. Clears the completion stamp.
- **Delete** — open the task and use the trash icon. Soft-delete; the row is recoverable for the standard retention window.

Notifications recap

- **Assignment** — newly-added staff assignees get an in-app bell notification immediately. (You're never pinged for self-assignments.)
 - **Reminder** — staff and traveler assignees both get emailed when the reminder fires.
 - **Client task added** — when you flip Client-visible on, portal users get a bell notification that a new task is waiting for them.
 - **Pending review** — when a client checks a task off, the trip's lead agent sees the yellow-pending row on the Tasks tab.
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Troubleshooting

My reminder never fired.

Three things to check, in order: (1) the task's **reminder_at** resolves to a real moment — a relative-anchor task on a trip with no start date can't resolve, so no fire. (2) The moment hasn't been "marked as fired" already — the row's **reminded_at** column is the suppression marker; once stamped, the reminder won't re-fire. (3) The reminder cron is running on the platform side — open a support ticket and we can confirm.

I moved the trip dates and my reminders moved too — was that supposed to happen?

Yes — relative anchors (**days before start**, **days after end**) are computed from the trip's dates. Move the trip and the reminder moves. Absolute-date reminders are unaffected — they fire on the literal date you set, no matter what happens to the trip.

The traveler checked off a task in the portal but it's still showing as not done in my Tasks tab.

That's the pending-review handshake working. Look for the yellow-bordered row on your Tasks tab — that's the client's checkoff waiting for your confirmation. Click **Confirm** to accept it (the task closes) or **Reopen** to push it back to the client.

Can the traveler see notes or assignees on a client-visible task?

They see the label, the notes, and the due date. They don't see who's assigned, the automation, or the reminder details — those stay internal to your team.

I assigned a teammate by mistake and now they're getting reminder emails. How do I undo?

Open the task, remove them from the assignees list, save. They stop getting reminder emails immediately. The initial assignment bell already fired — that one we can't recall, but it doesn't persist anywhere visible.

Related

- [Todo templates](#)
- [Email templates](#)
- [The client portal overview](#)
- [The Trip page, top to bottom](#)

