URTRAVELPRO

TRIPS

What Groups look like on the client portal — Hosted Trips + Lead landing

Every angle of the client-side experience for Groups: the Hosted Trips tile grid, the Group tab that layers on top of a traveler's trip, the Lead Dashboard for designated group leads, and the standalone Group Lead landing page for leaders who aren't personally traveling.

Prepared by System Generated · July 21, 2026

On this page

Group-related surfaces on the client portal split into three distinct landing patterns. Which one a viewer lands on depends on their role: is the client a traveler in the group, a designated Lead, both, or neither?

Hosted Trips — the public-facing tile grid

Every agency's client portal has a nav item labeled **{Agency name} Hosted Trips**. It shows every Group with a public booking page in an "upcoming" and "past" section:

- **Upcoming** — Groups whose end date is in the future and whose status is Open, Sold out, or Waitlist. Each tile has the cover image, name, destination, dates, and a "Book now" or "Sold out" or "Join waitlist" CTA.
- **Past** — Groups whose end date is in the past. Tile shows "Trip has ended" and, for members who traveled, a "Go to my trip" link so they can revisit memories.

> ADVISOR TIP
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> **This tile lives at** `/portal/{slug}/hosted-trips` (or `/hosted-trips` on a host-agency custom domain). Any client with a portal login sees it — even if they've never been on a group trip. It's public-facing agency inventory.

The Group tab — layered on a traveler's trip

When a client who's a member of a Group visits their normal **Trip** portal page, a new tab strip appears at the top: **My Trip** | **Group**. Clicking Group takes them to the group's portal surface.

Inside the Group tab, up to four sub-tabs (depending on role):

Community Chat

The live thread. Everyone in the group sees this — members, leads, and agents all post here together.

Members

The full roster. Names, avatars, "who's on which trip" for members who have their own linked Trip in the group.

Roommates

Only shown if the group has roommate matching enabled. Questionnaire, potential matches, inbound requests, outbound requests, approval status.

Lead Dashboard

Only shown to the designated Group Lead. Full roster with payment status pips, "days behind deposit" nudges, and attention-list items. Zero dollar amounts.

ADVISOR TIP

The Group tab shows an unread pill on Community Chat. Rose pill with the unread count. Once the member opens Chat, the read pointer updates and the pill clears.

The Lead Dashboard — chase without dollars

The Lead Dashboard is a KPI + roster combo built specifically for a non-agent lead who's helping the agency shepherd a group. It shows:

- **4 KPI tiles at the top** — Members (count vs. capacity), Deposits paid (paid / member count), Behind on forms (count of members with pending forms), Departure (countdown or "Today" / "Past").
- **Full member roster** — one row per member. Name, on-which-trip, deposit status (Paid / Partial / Unpaid pill), forms status ("2 pending" / "All done").
- **Days-behind-deposit callouts** — bold red text next to a member who's past due on their deposit.

Amounts are NEVER surfaced — the whole surface is designed so a group organizer (e.g. the friend who put together a friends' cruise) can chase people without needing to know what everyone paid.

ADVISOR TIP

Non-lead members don't see this tab at all. Only the designated Lead. Members see Chat + Members + optional Roommates.

The Lead Landing — when the lead isn't traveling

Sometimes the group organizer isn't going on the trip themselves — a friend who put together a girls' cruise but isn't going, a corporate coordinator organizing an incentive she's not personally attending. They still need portal access to the Lead Dashboard.

For these cases, Trips generates a **virtual trip page** at `/portal/{slug}/groups/{group_id}/lead` — same look as a regular trip page (cover, title, dates, countdown) but with:

- A "Group Lead" chip in the hero instead of the trip status pill
- Only the Group tab (no My Trip tab, because there's no trip)
- A Details tab with static group info + the agency contact's name
- The full Lead Dashboard + Chat / Members / Roommates access

The portal Dashboard shows a "Group leader dashboard" tile in the Your Trips grid for anyone in this position, so they can find their way to the Lead Landing on login.

ADVISOR TIP

A lead who ALSO travels sees BOTH. If the group's Lead is also traveling on a cohort Trip, they don't get a virtual landing — they land on their real Trip and access the Group + Lead Dashboard from the tab strip. The virtual landing is strictly for lead-only-no-trip cases.

Booking flow from the portal

When a client browses a Hosted Trips tile and clicks **Book now**, they're taken to the public booking page at `/g/{slug}` — the same page a non-logged-in prospect would see from a shared link. There's no special "logged-in booking" flow today; the portal is a jumping-off point, not an in-portal checkout.

After they book on the public page, if auto-convert is on, a new Trip lands on their portal Dashboard within a few minutes.

Frequently asked

A member has a portal login but doesn't see the Group tab on their trip.

The Trip needs to be attached to the Group (**Trips** tab on the Group). If the member was manually added without going through the booking form, no auto-link was created — attach the Trip manually from the Trips tab on the Group.

Does the Hosted Trips tile show sold-out groups?

Yes — sold-out groups appear with a red "Sold out" pill and a disabled CTA. A "See next trip" link appears if a future Open group exists.

Can members chat with each other privately?

Not today. The Community Chat is fully public within the group. If someone needs a private conversation, they can email each other via the Members tab (each row shows an email).

What happens to the Lead Dashboard when the group is over?

It stays live. The Lead can still see the roster and payment history for as long as the group is active (i.e. not archived). Archive the group to remove the tile from the portal entirely.

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