



TRIPS

Creating a Group — statuses, destinations, and settings

A field-by-field tour of the New Group form and the Settings tab: the five status states (Draft / Open / Sold out / Waitlist / Archived), the destinations list that feeds every member's Trip, roommate matching, and the archive workflow.

On this page

- [Making a new Group](#)
- [The five status states](#)
 - [Draft](#)
 - [Open](#)
 - [Sold out](#)
 - [Waitlist](#)
 - [Archived](#)
 - ["Past" is different](#)
- [Destinations — the shared itinerary skeleton](#)
- [Roommate matching \(optional\)](#)
- [Archiving vs deleting](#)
- [Frequently asked](#)
- [Related](#)

Making a new Group

From the **Groups** nav item, click **+ New Group**. A modal opens with the four required-to-get-started fields:

- **Group name** — what you (and the client) call it. *"Gaylaska 2027", "Amalfi October", "Corporate Retreat — Cabo"*. Up to 255 characters.
- **Start date / End date** — the departure window. Optional at creation, but nothing about the public page or the Financials rollup works well without them.
- **Brand color** — hex color that drives the public booking page primary button, the portal tile accent, and (as a fallback) the internal cover gradient. Defaults to Trips cyan.

Click **Create group** and Trips writes the row, mints a `public_id` + slug, and drops you on the Group's Overview tab. All the rest of the fields (destinations, description, roommate matching, capacity) live on the **Settings** tab and can be filled in whenever.

ADVISOR TIP

You don't need destinations at creation. Add them later from the Settings tab — they'll retroactively copy onto any Trips that get created after that.

The five status states

Every Group has one status at a time. The status drives what the public page shows and how the client portal treats the group.

Draft

Hidden from clients. Public URL 404s. Use while you're still building — cover, options, itinerary, hosts. The Members tab still works; you can add people ahead of time.

Sold out

Public page still renders but the **Book now** CTA becomes a disabled "*Sold out*" button. A "See next trip" link appears when a future Open group exists. Waitlist submissions can still be enabled per-option.

Archived

Hidden from your Groups index (toggle to **Archived** chip to see them) and from every client portal. Public URL 404s. Every underlying Trip, member, and message stays intact. Reversible.

Open

The workhorse status. Booking page live at `/g/{slug}`, accepting real bookings. Tile on the client portal is bookable.

Waitlist

The whole page becomes a waitlist collector — Name / Email / party size — instead of the full booking wizard. Waitlist submissions attach to the group with **Waitlist** role.

"Past" is different

Past isn't a status — it's derived from the end date. Groups whose dates are in the past show a Past chip on the index (behind the **Past** filter) and never rewrite their status.

ADVISOR TIP

Switching Open → Waitlist is destructive to submissions in flight. If a prospect is halfway through the booking wizard and you flip the status, their next submit attempt gets the waitlist form instead. Consider posting to Chat before flipping.

Destinations — the shared itinerary skeleton

The **Destinations** section on Settings holds an ordered list of legs (city + optional country code + arrival/departure dates + notes). It behaves exactly like a Trip's destinations tab — drag to reorder, sort by date, add rows with the **+ Add destination** button.

The important part: **these entries auto-copy onto every Trip that gets created from a Group booking.** A member who books your Amalfi group ends up with a Trip whose destinations tab is pre-populated with *Positano, Italy → Capri, Italy → Ravello, Italy*.

ADVISOR TIP

Country codes power the passport map. The client portal's "Countries visited" tile counts distinct country codes across all their trip destinations. Setting the country code on a Group destination is a one-time gift to every future member.

Roommate matching (optional)

Toggle **Enable roommate matching** on the Settings tab if this is a cruise / tour where solo travelers might share cabins to avoid the single-supplement. When on, members see a Roommates tab on their client portal with a compatibility questionnaire; mutual matches wait for your approval before pairing.

You can leave it off for groups where it doesn't apply (family reunions, corporate incentives). Turning it on later is safe — members see the new tab on their next portal visit. See [Rooming and roommate matching](#).

Archiving vs deleting

Groups can't be hard-deleted from the UI, on purpose — attached member Trips would lose their group context and the Financials rollup would drift. Instead, **Archive** from the Settings tab (danger zone at the bottom). Archived groups:

- Hidden from the main Groups index (visible behind the Archived filter chip)
- Public booking URL 404s
- Client portal removes the Hosted Trips tile
- Every attached Trip, Contact, Payment, Message stays untouched
- Un-archive with the same button any time

IMPORTANT

If you truly need a hard delete (e.g. GDPR request, test group created by mistake), that's a support request. Reach out and we'll wipe it with the underlying rows intact.

Frequently asked

Can I clone last year's group?

Not yet — that's on the roadmap. Today, create a fresh group, copy over the name / description / destinations / booking-page content by hand. The booking page editor takes about 15 minutes to re-fill.

What if I change the destinations after members have already booked?

Existing members' Trips are **not** back-filled. Only Trips created **after** the destination edit pick up the new legs. If you need to sync destinations onto already-booked Trips, edit each Trip's destinations tab manually.

Can I switch a Group from Open to Sold out and back?

Yes — freely. No data is lost either direction. The public page and portal tile respond in real time.

How do I know if members will see the group tile on their portal?

Members see the group's portal tile whenever the group's status is Open, Sold out, or Waitlist AND the group hasn't been archived. Draft and Archived groups are invisible on the portal.

Related

- [Groups overview](#)
- [Members and roles](#)
- [The public booking page](#)
- [Rooming and roommate matching](#)