URTRAVELPRO

TRIPS

Group members — roles, auto-attached Trips, and Group Leads

How the Group Members roster works: the three roles (Member / Leader / Waitlist), how Trips auto-create when someone books, promoting a member to Group Lead, and what a lead can do that a member can't.

Prepared by System Generated · July 21, 2026

On this page

Where members come from

There are three ways someone becomes a member of a Group:

1. **Public booking form.** When a prospect books through `/g/{slug}`, they and every party member are attached automatically. Primary booker gets the Trip; everyone in the party gets a Contact + Group Member row.
2. **Manual add on the Members tab.** The **+ Add member** picker searches your Contacts. If the person isn't a contact yet, add them from the picker's inline **+ New contact** link. They're attached with **Member** role.
3. **Waitlist join.** When a group's status is **Waitlist** (or a specific option is sold-out with waitlist enabled), the submitter is attached as a member with **Waitlist** role.

ADVISOR TIP

One membership row per contact, per group. If someone books twice or you accidentally re-add them, Trips deduplicates on (group_id, contact_id) — the second attempt is a no-op.

The three roles

Member

The default. Everyone starts here. They see the group's public content, get broadcast emails, join the community chat as a participant, and their payment status feeds the Group's Financials rollup.

Leader

One per group, max. Also called **Group Lead**. Gets a private Lead Dashboard on the portal + moderation powers on the community chat. Everything else is identical to Member.

Waitlist

Same as Member but tagged as "waiting for a spot." Filtered out of the roster on the Members tab by default (toggle **Show waitlist** to see them). When a spot opens up, promote them to Member from the member row menu.

Promoting or demoting

Change a member's role from the **Role** dropdown on their member row. Promoting to **Leader** automatically demotes any existing leader — Trips enforces the "one lead" invariant in a transaction.

When Trips auto-create

The moment a public booking submission is converted (either automatically at submit time or manually from the Submissions tab), Trips creates a fresh Trip for the primary booker with:

- **Name** — the group name, e.g. *"Amalfi Coast small group"*. Rename per-booking if you want.
- **Dates** — copied from the Group's default start/end dates.
- **Trip status** — the org's default (usually *Quote Sent*).
- **Destinations** — copied from the Group's destination list, ordered.
- **Travelers** — the primary booker plus every other party member listed on the submission (each becomes a Contact if they weren't already).
- **Invoice** — a Supplier Invoice with a line item per chosen option + any add-ons, matching the deposit/final schedule you configured.

The Trip is attached to the Group via a many-to-many pivot (`trip_group_trip`) so the Group's Trips tab lists it and the Financials rollup includes its invoice.

> ADVISOR TIP
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> **Manual add-member does not spawn a Trip.** If you add a member from the Members tab (bypassing the booking form), no Trip is created — that member is on the roster and gets the chat + portal treatment, but you still need to build them an invoice / itinerary. Use the booking form for the full auto-create flow.

Removing a member

Remove from the member row menu. What happens:

- **The membership row is hard-deleted.** No soft-delete — the row is gone.
- **The attached Trip is NOT deleted.** If the removal was a mistake, the Trip still exists — you can re-add the person as a member from the Members tab and Trips will re-attach.

- **The Contact stays.** Contacts are agency-wide; group membership was just an association.
- **Any invoice payments they've made stay untouched.** The Trip's invoice keeps its history.

> ADVISOR TIP
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> **Removing a member does not refund them.** If someone drops with a payment already logged, use the invoice's Refund flow on the schedule row separately. Removing them from the group and refunding are two different actions.

What Group Leads can do

The Leader flag unlocks these capabilities on the client portal side — the agent-side Members / Financials / Booking Page views are unchanged:

- **Lead Dashboard** — private tab on the portal group page. Shows the full roster with each member's payment status (Paid / Partial / Unpaid pill) and "days behind deposit" nudge. Amounts are never shown — this surface is deliberately dollar-free.
- **Chat moderation** — Leads can delete member messages in community chat (never agent messages). Members can only delete their own.
- **Group Lead landing page** — if the Lead isn't personally traveling on any cohort trip, they still get a portal entry point: a virtual trip-shaped landing at `/portal/{slug}/groups/{group_id}/lead`. Covered in Client portal: Hosted Trips.

> ADVISOR TIP
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> **Leads never see dollar amounts.** The Lead Dashboard is meant for a group-organizer non-agency-staff person — "the friend who put the trip together." They can chase people on payments without needing to know what everyone paid.

Frequently asked

Can a group have more than one leader?

No — one leader per group, enforced by the model. If two people are co-organizing, pick one as the flag-holder for the portal dashboard; the other stays a Member and can still see the community chat.

What happens if I demote the leader to a member?

Their **is_lead** flag flips off. They lose the Lead Dashboard tab on their next portal visit and can no longer delete member messages in chat. They stay in the group as a normal member.

A member booked twice — same person, two submissions. What now?

Only one Group Member row exists (unique on group + contact). But you'll see two Submissions on the Submissions tab and possibly two Trips (if both got auto-converted). Manually delete the duplicate Submission or cancel the extra Trip's invoice.

Can I export the member roster to CSV?

The **Rooming** tab has an Export button (Excel + CSV) that includes every member with their room assignment, sharing info, and contact details — that's the closest thing today. A pure member-roster export is on the roadmap.

Related

- Groups overview
- The public booking page
- Rooming and roommate matching
- Client portal: Hosted Trips