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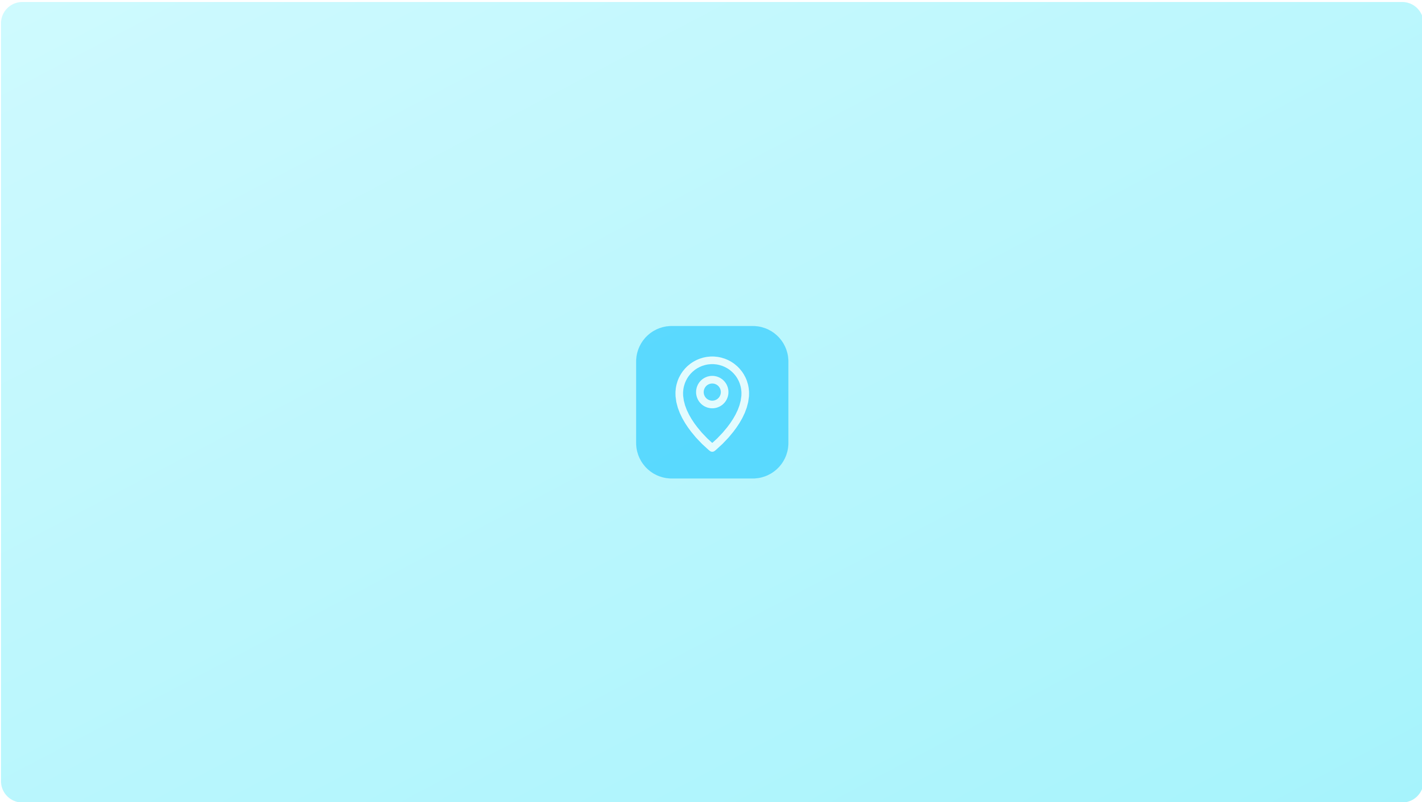

TRIPS

Groups in Trips — what they are, when to use them

Groups are Trips' primitive for hosted cohorts — cruise groups, escorted tours, themed trips, corporate incentives. This article explains what a Group is, when to reach for one instead of individual Trips, and how the pieces fit together.

Prepared by System Generated · July 21, 2026

On this page

A **Group** is a Trips record that represents a cohort of travelers heading somewhere together on the same dates. The classic use cases: an agency-hosted cruise, an escorted tour, a themed trip (photography workshop, wine harvest week, Northern Lights chase), or a corporate incentive.

Groups aren't a replacement for Trips — they sit alongside them. Every member of a Group ends up with their own Trip record (auto-created when they book). The Group is the container that holds the shared plumbing: one booking page, one roster, one chat, one payment plan, one set of destinations that gets copied down onto every member's Trip.

> ADVISOR TIP
>
> **This is the overview.** For the CRUD nuts and bolts (create, edit, statuses, archive), skip ahead to Creating a Group.

When to use a Group vs. individual Trips

Reach for a Group when

- Multiple clients travel together on shared dates
- You have a shared cover, itinerary, and pricing that repeats per traveler
- You want a public "book this trip" URL you can share on social

Stick to individual Trips when

- Everyone is going somewhere different
- Every client has custom dates, pricing, or destinations
- You don't need a public URL — everything is bespoke

- You need one place to broadcast messages to everyone attending
- You want a roster you can hand a supplier (e.g. cruise-line manifest)
- You need to fill rooms — the roommate-matching primitive lives on Groups

- Your workflow is fully 1:1 (couples, families, corporate one-offs)

ADVISOR TIP

You can mix and match. A client can be a member of a Group AND have unrelated 1:1 Trips at the same time. Their trip drawer shows both.

What a Group contains

Every Group has the same anatomy — you don't enable features per group; they're all there. What differs is how much of it you fill in.

The shared record

- **Name** — internal + external label (e.g. *"Gaylaska 2027"*).
- **Status** — Draft, Open, Sold out, Waitlist, or Archived. Drives what the public page shows.
- **Default start / end date + destinations** — copied onto each member's Trip when they book.
- **Brand color + cover image** — for the public booking page and portal tiles.
- **Booking deadline** — soft deadline for the "book by" nudge.
- **Min / max members** — capacity limits.

The 11 tabs

- **Overview** — KPIs, activity, quick actions.
- **Members** — roster; add, promote to leader, remove.
- **Trips** — auto-created per-member Trips.
- **Rooming** — cabin/room assignments, roommate matching.
- **Financials** — revenue, commission rollup, per-member payment status.
- **Amenities** — perk thresholds ("free wine at 10 cabins, spa credit at 20").
- **Booking page** — the public /g/{slug} editor.
- **Submissions** — everyone who filled out the booking form.
- **Messages** — agent-to-everyone broadcasts.
- **Chat** — community chat between agents and members.

- **Settings** — status, dates, roommate matching toggle, danger zone.

How a booking flows through a Group

Understanding the lifecycle helps every other decision. Here's a typical Open group from the day you publish the booking page:

1. **You publish the group.** Status flips to Open, booking page is live at `/g/{slug}`.
2. **A prospect submits the booking form.** A Booking Submission row is written. Optionally converted automatically into a Trip (see the Booking page article).
3. **The auto-created Trip.** If auto-convert is on, Trips mints a new Trip for the primary booker, attaches the destination(s) from the Group, adds all party members as travelers, and creates a Supplier Invoice with the option prices as line items.
4. **The Group's Members roster fills.** Every traveler on that Trip becomes a Group Member automatically.
5. **You accept payments through the invoice.** Each member's payment status feeds the Group's Financials rollup.
6. **The Group's status can go to Sold out.** Public page swaps to a sold-out CTA. Optionally accepts waitlist submissions.
7. **Travel happens.** Chat is live throughout. Members see the Group tab from their own trip portal.
8. **The Group ages into "past".** Automatically inferred from dates — you don't flip a switch. Past state shows on the Groups index + hides from the client's active portal.

Individual agent vs. host-agency mental model

Groups work for solo agents running a couple of hosted trips a year AND for host agencies running dozens with a leader coordinator per group. The difference is how you assign leaders.

Solo agent

You're running the group. No leader designations needed. Every member is just a member; you're the point of contact for chat, payments, and questions. Skip the leader role entirely.

Host agency

One member is designated the **Group Lead** — usually the person who assembled the group. Leads get a private Lead Dashboard on the client portal (roster + payment progress, no dollar amounts) and can moderate the community chat. See Members and roles.

ADVISOR TIP

The leader can be a non-traveler. A group organizer who's coordinating a friends' cruise but not going themselves still gets a full lead dashboard — Trips knows the difference and gives them a virtual trip surface. See Client portal: Hosted Trips.

Frequently asked

Is there a limit on how many members a Group can have?

There's a soft cap you set per group (max_members) that governs the public "sold out" behavior. There's no hard platform cap on member rows.

Can a Group hold Trips from previous years, or is it strictly one departure?

One departure per Group. If you run *"Gaylaska"* every year, create a new Group each year (they're fast to clone in your head — same shape, new dates). Past Groups stay searchable and their financials keep counting toward reports.

Do Groups show up in the same Reports as regular Trips?

Yes. The Trips that get auto-created from Group bookings roll up into Sales, Commission, Client LTV, and every other report exactly like any other Trip. The Group is invisible to reports — the individual member Trips are the reporting unit.

Does a Group need a public booking page, or can I keep it internal?

Purely optional. A Group with status=*Draft* has no public page. You can still add members manually, chat, track payments, do everything else. The booking page is for public promotion; skip it if you're assembling the group by hand.

Related

- Creating a Group
- Members and roles
- The public booking page
- Client portal: Hosted Trips