



TRIPS

Rooming and roommate matching — filling cabins for hosted groups

The Rooming tab: how to assign members to rooms/cabins, export a supplier-ready manifest, and — when enabled — how the roommate-matching flow works from a solo traveler's portal through mutual match to agent approval.

On this page

- [Room assignments \(always on\)](#)
- [Roommate matching \(opt-in per group\)](#)
- [The four match states](#)
 - [Requested](#)
 - [Mutual, pending approval](#)
 - [Approved](#)
 - [Declined / Withdrawn](#)
- [The Approvals queue](#)
- [What members see](#)
- [Frequently asked](#)
- [Related](#)

Two related-but-separate features live under the Rooming umbrella:

- **Room assignments** — every group has this. Assign members to rooms/cabins, export the manifest for the supplier.
- **Roommate matching** — opt-in per group. Solo travelers self-serve a compatibility questionnaire and browse potential roommates. Mutual matches wait for agent approval before pairing.

Room assignments (always on)

The Rooming tab shows every member with an optional **Room number** + **Room note** field. Add anyone to a room by typing a number; multiple members with the same room number are treated as sharing.

The **Export rooming** button (top-right) generates an Excel or CSV file with the columns most cruise / tour operators want:

- Room number
- Member name + role (Lead sorts to top of their room)
- Contact email + phone
- Passport number + expiration (from the Contact's passport tab)
- Date of birth
- Bed configuration preference (from the member's notes field)

ADVISOR TIP

Room numbers can be any string. Use ship-cabin codes ("7104"), tour rooms ("Villa A — Room 2"), or just numbers. Anything you type is what shows up on the export.

Roommate matching (opt-in per group)

Toggle **Enable roommate matching** on the group's Settings tab to turn on the self-serve matching flow. When enabled:

- Members see a new Roommates sub-tab on their portal group page
- A short compatibility questionnaire appears (wake time, tidiness, snoring, smoking, etc.)
- Once completed, they see a list of potential matches (other members with completed questionnaires, sorted by compatibility score)
- They can send match requests. The requested member gets a notification
- If both accept, the match enters "Mutual, pending agent approval" state
- You approve (or reject) from the Rooming tab; approved pairs get assigned the same room number

ADVISOR TIP

Solo travelers are the ONLY audience. Members already in a party of 2+ don't see the Roommates tab — the whole flow is designed for the "I want to share a room to avoid the single supplement" scenario.

The four match states

Requested

Member A sent a request to Member B. B sees an inbound request card; A sees an outbound "waiting" card.

Mutual, pending approval

Both members accepted each other. Sits in the agent's Rooming tab as a pending approval card. Doesn't assign a room yet.

Approved

Agent clicked Approve. The pair is assigned the same room number. Their status pill on Rooming flips to Paired.

Declined / Withdrawn

Either side declined, or a request was withdrawn before acceptance. The requesting member can send a new request to someone else.

The Approvals queue

When roommate matching is enabled and mutual matches exist, the Rooming tab shows an **Awaiting approval** section at the top. Each card shows:

- Both members' names + photos
- Their compatibility score (0-100)
- When they matched
- A quick side-by-side of their questionnaire answers
- Approve / Reject buttons

Rejecting sends a polite auto-email to both members explaining the pair wasn't approved (you can add a note). Both are free to match with someone else.

ADVISOR TIP

Why does the agent approve at all? Two reasons. First: it's a chance to spot obvious mismatches the questionnaire missed (e.g. one member has a service animal and the other has severe allergies — a real case). Second: it prevents members from gaming the system if you have any waitlist / capacity pressure.

What members see

On their portal, if the group has roommate matching enabled AND they haven't completed the questionnaire, they see a soft banner: *"Fill out roommate preferences to find a match."* Once completed, the banner disappears and the Roommates tab shows their queue.

For approved pairs, both members' portal shows a Paired card with their roommate's name + email (so they can coordinate directly). The card stays visible until departure.

Frequently asked

Can I disable roommate matching after it's been used?

Yes, but consider the timing. Existing approved pairs stay paired. Pending requests / mutual-pending-approval matches are held in place but no new questionnaires can be filled out. Members see the Roommates tab disappear on their next portal visit.

What if someone changes their mind after they're approved?

Contact your agent (you). Manually clear the room number on the Rooming tab; the pair drops back to unpaired. Rare enough that it stays a manual override.

How does the compatibility score get calculated?

Weighted match of the questionnaire fields. Non-smoker + non-smoker scores higher than mixed. Similar wake times score higher than opposite. It's a rough heuristic — the score is a filter aid, not a promise.

Can I add a room without a member?

Room assignments live on member rows — no membership, no room. If you're trying to reserve capacity for a not-yet-booked pair, hold it in your head (or in the Notes field on the group) until they book.

Related

- [Members and roles](#)
- [Creating a Group](#)
- [Client portal: Hosted Trips](#)