URTRAVELPRO

TRIPS

Groups

Hosted travel groups: create a group, attach trips, manage members, publish a public booking page that auto-creates trips from sign-ups.

Prepared by System Generated · June 29, 2026

On this page

Groups model a hosted trip — a group cruise, escorted tour, themed travel cohort — where one container holds many individual traveler trips, a shared roster, communication channels, and an optional public booking page that captures sign-ups directly into your CRM.

This article covers the foundation (Phase 1) through to the public booking page (Phase 3). Messages and the live chat room ship in Phase 4 — see the bottom of this article for what is coming.

When to use a Group

A Group is the right primitive when you are hosting one travel experience that multiple separately-paying parties join. Examples:

- A group cruise where each couple or family books their own cabin

- An escorted tour with multiple booked travelers
- A themed travel cohort (LGBTQ+ pride travel, photography workshops, food + wine)
- Any wedding party or anniversary trip where several rooms / cabins need their own paperwork

A Group is NOT the right primitive for a single party traveling together — that is just a Trip with multiple travelers.

Create a group

1. Click Groups in the sidebar (currently labeled BETA while we finish building)
2. Click "New group"
3. Enter a name (e.g. "Smith Family Cruise"), an optional default destination, optional default start/end dates, and a brand color
4. Submit — you land on the new group's page

The default destination and dates pre-fill onto every trip created inside the group, so your travelers do not have to re-type them.

Add members

The Members tab manages who is in the group. Two ways to add members:

- Click "Add member" → search your existing org contacts → pick one. They are added with role = Member
- Sign-ups via the public booking page (next section) automatically become members + get an auto-created trip

Promote a member to Leader by changing their role from the inline dropdown. Leaders get send-message permissions when Phase 4 ships.

Attach trips

Two ways to populate the group with trips:

- Create new trip — opens the trip wizard with the group pre-attached; on submit the trip is automatically linked
- Attach existing — search any trip in your org that is not already attached; one click moves it in

A trip can belong to multiple groups (e.g. main group cruise + pre-cruise side excursion). Detaching from one group does not affect the other.

The public booking page

Every group can have one public booking page at /g/{slug}. Open Booking page tab → click "Create booking page" if none exists, or "Edit page" if you have one.

Editor sections

- Hero image — uploaded to encrypted R2 storage, 10 MB max, PNG/JPEG/WebP. Doubles as the group cover
- Page title + subtitle — the hero headline
- Description — plain text or simple HTML (rich editor in Phase 4)
- Highlights, What's included, What's NOT included — bullet lists shown as checkmarks (highlights + included) or red Xs (excluded)
- Bookable options — room types, cabin classes, package tiers. Each has a label, price, and optional sold-out toggle. Leave empty if there is one option only
- Deposit amount — optional. Stored in cents (25000 = $250.00)
- Terms text + required checkbox — terms are snapshotted on every submission for legal audit
- Expiration — optional. After this date the public page returns 404

Publishing

Click "Publish" in the header to make the page live. Click "Unpublish" to take it down without deleting. The agent-side editor stays accessible regardless.

How sign-ups become trips automatically

Every public submission goes through this pipeline immediately on submit (no manual "convert" step):

1. Terms text is snapshotted onto the submission row with the IP, user agent, and timestamp
2. A Core contact is created (or matched on existing email / name+DOB)
3. A local Trips contact is created bound to that Core UUID
4. The primary submitter is added to the group's member roster
5. A Trip is created named "{Last name} party — {Group name}" with the group's default dates
6. Every traveler row on the submission becomes a Trip traveler (the primary is row 0 / is_primary=true)
7. The Trip is attached to the group via the trip-group pivot
8. The submission row gets status=converted with converted_to_trip_id pointing at the new Trip

If Core is unreachable during conversion the submission is still saved with status=new; the rest gets caught up on the next agent action.

Booking submissions tab

Lists every public sign-up, newest first. Columns: submitted date, primary contact, party size, selected option, status, converted Trip link. Click through to the Trip for full editing.

Broadcast messages

The Messages tab on a group sends one email to every group member who is on at least one trip in the group. Each email also lands on the recipient's trip Messages tab, so when a client replies the conversation threads back into their specific trip.

Composing

- Subject + plain-text body (line breaks preserved in the email)
- Pre-send count shows "Will send to N members across M trips" — and a separate amber count for members not on any trip who will be skipped
- Sent via the agent's connected Gmail when available; falls back to the platform Postmark mailer otherwise (no-Gmail authors are no longer silently dropped)
- Each per-trip email tagged with source_group_message_id so the broadcast can be reconstructed for audit

Past broadcasts

The right column of the Messages tab lists every broadcast in order — subject, sent date, sender, recipient count, and how many were skipped (no email on file). Click "View message" to expand the full body inline.

Why some members get skipped

Two reasons a member won't receive a broadcast:

- They're a member but not on any attached trip yet — the broadcast model is per-trip, so attach them to a trip first
- Their Core contact has no email on file — Core's contact-show endpoint returned an empty email. Fix by editing the Core contact and adding one

Group attachments

Files uploaded to a group live in trip_group_attachments and can be attached to any broadcast email from the composer. They're encrypted at rest on R2 with the same tenant-scoped AES-256-GCM cipher trip attachments use — so if you ever need to hand-recover a blob, the same tooling works.

- Upload via the composer's "+ Upload file" button when composing a broadcast
- 10MB max per file. PNG / JPEG / WebP / PDFs / most common docs pass ClamAV scanning
- On send, each per-trip email gets a "mirror" TripAttachment row pointing at the SAME R2 blob (no storage duplication). The mirror kind is "group-broadcast-attachment" so it doesn't appear in that trip's Files tab

Chat room (Phase 4b.1 — agent side)

The Community Chat tab on a group is a live in-app shared thread between everyone in the agency team. Polling-based delivery every 3 seconds — good enough for a booking-thread cadence, and websockets can slot in later without changing the UI contract.

How it works today

- Every agent who opens the tab sees the same shared thread
- Enter to send, Shift+Enter for a new line — Slack/Gmail convention
- Your own messages sit on the right in brand color; teammates' on the left in slate; portal-member messages (Phase 4b.2) will render in amber
- Live indicator in the header confirms polling is active. Auto-pauses when the browser tab is backgrounded, resumes when you return
- Unread badge on the Community Chat tab shows the count of messages posted since your last visit
- Auto-scroll pins to the bottom on new messages unless you've manually scrolled up (Slack-style)

Data model

Each message is a trip_group_chat_messages row with either author_user_id (agents) OR author_contact_id (portal members, when Phase 4b.2 lands) — never both. Per-(group, member) last-read pointers in trip_group_chat_reads drive unread counts without scanning every message.

Coming in Phase 4b.2

- Portal-side chat surface — members see the same Community Chat from their trip portal and can post as themselves
- Rich editor (Tiptap) for both chat and broadcast composer
- Chat attachments (currently text only)
- Online deposit payment (Stripe Connect) directly on the booking page

Common questions

Can a contact be in multiple groups?

Yes — the trip_group_members table is a pivot, so the same contact can be a member of many groups.

Can a trip be in multiple groups?

Yes — same M:N pattern. Most won't be, but the schema supports it.

What happens to attached trips if I archive a group?

Trips stay intact. Archiving only hides the group from the index; the trip-group pivot rows remain, so unarchiving restores the full state.

Who can access the public booking page?

Anyone with the URL — there is no auth required to sign up. Spam-control is via the IP rate limit (5 submissions/minute per IP). Add a terms_required checkbox to slow drive-by submissions further.
