



TRIPS

Team management + roles

The Team view inside Trips is read-only — invites, role changes, removals, and seat upgrades all happen in Core. Why Core is the authority, what the four roles do, how Trips-specific access is granted, the seat-status meter, and how the page links you out to Core for changes.

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The Team view at **Settings** → **Team** shows everyone in your agency with access to Trips — name, role, when they joined, and when they last signed in. It is intentionally **read-only**. Every change — adding a teammate, changing a role, removing access, upgrading the seat plan — happens in Core, the platform's identity authority.

IMPORTANT

Trips never edits memberships. If Trips wrote to memberships locally, you would have two sources of truth that drift the moment they disagree. So the page shows you the roster and points you at Core for changes. The button is in the bottom-right of the page: **Manage team in Core**.

Why Core is the authority

Your UrTravelPro account is a single identity that can belong to several agencies, and within each agency it carries a role and a per-app access map. That model lives in Core because every other app — Books, Marketing, Compass, Trips — needs to trust it. If Trips owned its own roster, signing in to Books with the same email could surface different teammates. So Core holds the roster, the role, and the per-app entitlement, and every app projects them.

The four roles

Trips honors Core's organization roles directly. Each one means the same thing in every app:

- **Owner** — full control. Automatically has Trips access. Sees the Passport access log, the Team page, and every billing surface. Most agencies have one or two owners.
- **Admin** — full operational control. Automatically has Trips access. Can see the Passport access log. Billing authority is a separate **Can manage billing** flag — independent of role — so an admin only sees billing surfaces when an owner has granted them that flag in Core.
- **Member** — your day-to-day agents. **Trips access is not automatic — it must be granted explicitly per-member in Core.** Cannot see the Passport access log.

- **Viewer** — read-only across the apps they have access to. Rare; usually a bookkeeper or a consultant.

ADVISOR TIP

A member without Trips access gets "no entitlement" at sign-in. If someone in your org cannot get into Trips even after you have created their Core account, an owner needs to open Core, find their row under **Organization** → **Users**, and tick **Trips** under app access. Owners and admins inherit access automatically; members do not.

The seat-status meter

At the top of the Team page, when your Trips plan has a seat cap, you see a meter — *"3 of 5 seats used — 2 remaining"* — with the plan name underneath (Trips Individual, Trips Growth, Trips Host Agency, or just Trips). The numbers come straight from Core, so they reflect your **current** subscription, not a stale Trips-side cache.

- When you are well under the cap, the meter is white.
- When you are **at** the cap, the meter turns amber and an **Upgrade Trips plan** button appears that links straight to Core's plan-change flow. New invites will be blocked until you upgrade or remove someone.
- Trips Host Agency has no cap — the meter shows *"unlimited seats"* and never goes amber.

Last active in Trips

The Joined column shows when the person was added to your agency in Core. The **Last active** column is a Trips-specific number — when they last actually signed into Trips, not when they last signed into any app. A teammate who lives in Books and never opens Trips shows *"Never signed in to Trips"* even though they are an active member of the agency. This is the distinction that helps you spot seats you might be wasting.

Making a change — the click-through

Every change happens in Core. From the bottom of the Team page, **Manage team in Core** opens `core.urtravelpro.com/organization/users` in a new tab. From there:

1. **Add a teammate** — invite by email. They get a one-time link that creates their account and joins your org. If your plan has a seat cap, the invite respects it.
2. **Change a role** — click the person's row in Core. Owner / admin / member / viewer is a single dropdown.
3. **Grant Trips access to a member** — same row in Core. App-access checkboxes for Trips, Books, Marketing, Compass.
4. **Remove a teammate** — same row, Remove. The seat frees immediately; the local Trips user record stays for audit purposes but the person can no longer sign in to Trips.

ADVISOR TIP

Changes propagate within seconds. Role changes, access grants, and removals take effect the next time the person hits a Trips page. They do not need to sign out and back in for the new role to apply.

What if Core is unreachable?

On the rare occasion Core is unreachable from Trips, the page shows an error banner — *"Could not reach Core to load the team roster"* — and the table renders empty. The seat-status meter silently disappears. Refresh in a moment; it almost always self-resolves before you finish reading the banner.

Related

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