Onboarding Guide

All WeTravel Organizer Accounts

Account Creation

Required Actions

- ☐ Confirm your email address (in your welcome email, sent at account creation)

Best Practices

- ☐ Begin the account verification process here per these instructions
- ☐ Protect your account using a password manager and 2-factor authentication
- ☐ Configure general settings in your profile (e.g., add profile photo, link your terms & conditions)
- ☐ Need a quick summary of how to set up trips (and more) in WeTravel? Check out our video orientation here

First Trip Created

Required Actions

- ☐ If not already completed, verify your account here (when logged in) per these instructions

Best Practices

- ☐ Watch "5 Of Our Most Popular Features" video
- ☐ Set up a booking button on your website (if applicable) and customize it (if you'd like)
- ☐ Bookmark our Help Center (English | Spanish) & our video knowledge base (English | Spanish)

First Booking Received

Required Actions

- ☐ Review the payout methods available on WeTravel and begin by setting up standard payouts: USD, GBP, EUR, CAD, AUD, or ZAR (note: this will only be possible after account verification)

Best Practices

- ☐ Get acquainted with the My Trips section of your account (when logged in)
- ☐ Invite team members and/or suppliers to collaborate with you on WeTravel
- ☐ Decide to proceed with a Basic vs. Pro account (if not already completed)
- ☐ Check out the user experience for your customers by taking a quick tour of their customized booking dashboards

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First Payout Complete

Required Actions

- [ ] Beyond "standard payouts," set up additional payout/transfer methods (as your operations require) including instant payouts to your USD debit card, loading USD to your WeTravel card, making suppliers transfers directly within WeTravel, or sending wire transfers to any accounts around the world

Best Practices

- [ ] Get acquainted with the reporting sections of your account (Payments and Dashboard, when logged in)
- [ ] Connect with your peers in our Facebook Groups for Tour Operators, LatAm Travel Companies, and/or Retreat Leaders
- [ ] Stay up to date on features releases & improvements by bookmarking our Product Hub

Conclusion Of First Trip Managed Through WeTravel

Required Actions

- [ ] If your initial verification decision was "partial approval," contact info@wetravel.com 30 days after the trip's conclusion to request a review of your account for a possible upgrade in status

Best Practices

- [ ] Enroll in our Booking Management course to get more in-depth insight into making WeTravel work best for you
- [ ] Consider installing a review widget on your website to increase conversions
- [ ] Join our WeTravel Innovation Council if you'd like to give product feedback and get to know other travel business owners in our community