Onboarding Guide

WeTravel Pro Accounts

Account Upgrade

Required Actions

- [ ] When logged in, upload your business logo & set up your branded URL in the [Pro Settings section of your profile](#)

Best Practices

- [ ] When logged in, customize your travel insurance offer by providing the link of your choice (or removing insurance links from your communications altogether) also in the [Pro Settings section of your profile](#)
- [ ] Connect WeTravel with your [Google Analytics](#) account (if applicable)
- [ ] Integrate your existing tech with our no-coding required [Zapier](#) API and/or our four [custom APIs](#)

At First Trip Set-Up with Pro

Required Actions

- [ ] When logged in, familiarize yourself with the [Leads Tab](#) in your account, which will allow you to track leads generated by our Pro-only "download brochure," "ask a question," and "abandoned cart" features

Best Practices

- [ ] Take advantage of the Pro-only enhancements to our basic [payment plans](#), including customizable installment amounts and optional auto-billing
- [ ] Empower travelers to raise funds for their trips by enabling Go Fund Me-style [contribution pages](#) (great for student trips; simply toggle them on and there's no extra cost or effort on your part)
- [ ] Require legally-binding customer signatures by incorporating [eSignatures](#) into your registration process or collecting ink-signed [documents via upload](#)

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