Onboarding Guide

WeTravel
Team Members

Account Creation

Required Actions

- ☐ Create your account by clicking the "accept invitation" link in your invite email

Two Important Notes

- ☐ You don't need to go through account verification to use WeTravel as a team member (you won't be collecting funds on your own behalf)
- ☐ You gain automatic access to all WeTravel Pro features when managing trips on behalf of a Pro account holder

Best Practices

- ☐ Check out our 90 second tutorial on how to create trips as a team member (English | Spanish)
- ☐ Protect your account using a password manager and 2-factor authentication

Building Trips

Best Practices

- ☐ Learn best practices for creating trips as a team member
- ☐ Watch "5 Of Our Most Popular Features" video
- ☐ Bookmark our Help Center (English | Spanish) & our video knowledge base (English | Spanish)

Managing Bookings

Best Practices

- ☐ Enroll in our Booking Management course to get more in-depth insight into making WeTravel work best for you
- ☐ Stay up to date on features releases & improvements by bookmarking our Product Hub
- ☐ Manage automatic email notifications you receive from WeTravel under notification settings

Accounting

Best Practices

- ☐ If you have been granted access to view reporting at the account level (across all trips), you can access specific reports per these instructions: payments reporting, payout/transfer reporting, and transactions reporting
- ☐ "Accountant" team members (ie., those with the permissions described above) can also integrate WeTravel with Quickbooks or similar bookkeeping software per these instructions