

Welcome to Tern

Your Journey Starts Here



Travmanity

Advisor Onboarding Guide

Welcome Aboard

You've just joined Tern, and we couldn't be more excited to have you with us. This guide isn't just paperwork—it's your flight plan. It'll keep us on course, keep things moving, and make sure your agency is cleared for takeoff.

I'm genuinely thrilled you're here. Joining Tern isn't just about a platform—it's about becoming part of a crew that's got your back. We'll tackle onboarding step by step, together, so you're set up for smooth skies, big wins, and a future that's wide open. Welcome to the Tern family—we're so glad you're on this journey with us.



Your Personalized Onboarding Guide to Tern

Getting started with a new system can feel overwhelming, but we've got you covered. Tern gives you everything you need to feel confident and productive fast. With self-paced training, step-by-step resources, and live support for any question, we're here to make your onboarding easy and successful!

Training at your fingertips

[The Tern Training Hub](#)

Your personalized check-list, step-by-step series, and in depth training designed to help new and transitioning advisors build confidence and fluency with the platform. You'll develop skills to plan, price, and present trips in Tern, with each session building on the last.

 *Pro Tip: Start here to get a comprehensive overview of the Tern system.*

Support from Tern's team of experts

[Tern Training Events & Office Hours](#)

This step-by-step series is designed to help new and transitioning advisors build confidence and fluency with the platform. You'll develop skills to plan, price, and present trips in Tern, with each session building on the last.

[Help Center](#)

Tern's official Help Center documents step-by-step processes and documentation to provide you with information on key capabilities in Tern.

[Fin & Tern Support Team](#)

Inside Tern, you'll have access to Fin, our powerful AI assistant, and our dedicated Support Team, ready to help. You can also reach us directly at help@tern.travel

Product updates & the Tern community

[Flight Path Podcast](#)

Join Tern's R&D leadership team as we bring you behind the scenes.

[Tern's Blog](#)

Find a full list of product updates and new to make the most impact with Tern.

[Official User Group](#)

Join on Facebook for discussion on upcoming features, get help from the Tern community, give feedback on product questions, and more!

Travmanity Resources Recorded Training Sessions

- Tern Overview & Orientation - [Recording](#) Passcode: E^7?2s1m
- Trip Building & Booking in Tern - [Recording](#) Passcode: n+F%4VbM
- Group Trip Building in Tern - [Recording](#) Passcode: x6+Vmup=
- Booking, Payments, Workflows & Reporting - [Recording](#) Passcode: =TC6myp

Advisor Account Setup

 **17** Join the *Travmanity x Tern: Tern Orientation & Overview* training on Monday, August 31st for a live review of the below resources to get started in Tern.

If you are an agency owner with a team, refer to [this getting started guide](#)

Step 1: Tern Platform Overview

Outcome: Orient yourself to Tern — learn how to navigate your dashboard and keep key tasks top of mind.

[Get familiar with your Tern Dashboard — 4-min tutorial](#)

[Navigate and manage your Trip Dashboard — 3-min tutorial](#)

Step 2: Personal & Business Settings

Outcome: Configure your Tern account with the settings you need to run your business smoothly.

 *Pro Tip: Open Tern's AI Chat and start with the prompt "I'm new to Tern" and select the option to get help with your account setup.* [Get started with AI Chat — 7 min tutorial](#)

Personal Settings

[Set up your personal settings — 2-min tutorial](#)

Account settings — your name, email, and details shown to clients on forms and itineraries

Notifications — get email alerts for form submissions, itinerary feedback, and credit card authorizations

Security — enable 2-step verification (*required for credit card auth., travel insurance, & service fees*)

Business Settings

[Set up your business settings — 4-min tutorial](#)

Business information — your agency name, [credentials](#), and affiliations

 *Note as you start using Tern: Your agency name is your business name, not Travmanity. If you are a solo advisor, you do not need to create a new agency in Tern. If you are an agency owner, follow the owner onboarding process to setup your agency for your team to be invited to.*

Waivers & agreements — your personal T&Cs that clients agree to on forms and credit card auth.

 *If your agency provides your T&Cs, your owner will set those up in the Agency Settings.*

Trip settings — toggle on "Use Tern to manage credit card authorizations" under [Trip Settings](#) to authorize credit card payments through Tern.

Email & scheduling — connect your email and set your availability so clients can book with you.

Have additional questions? Join an office hours session at [tern.travel/events](#) — look for "Q&A | Account Settings, Setup, and Imports."

Trip Building in Tern

 **17** Join the *Travmanity x Tern: Trip Building in Tern* training on Wednesday September 2nd for a live review of the below resources to get started in Tern.

Step 3: Trip & Itinerary Building

Outcome: Build a complete trip in Tern from scratch — add travelers, create itinerary items, preview the client experience, and publish with confidence.

 *Pro Tip: Open Tern's AI Chat and start with the prompt "help me build a trip"*

[Get started with AI Chat – 7 min tutorial](#)

[Trip building basics — 6-min tutorial](#)

[Collect credit cards securely — 4-min tutorial](#)

Other trip capabilities to work more efficiently in Tern:

- [Option blocks](#) — give clients choices within a trip
- [Optional add-ons](#) — let clients customize their experience
- [Do more with AI Chat](#) – add media, audit trips, publish changes, and more
- Book insurance, packaged travel, tours, and transfers directly in Tern

 *Pro Tip: You can find the list of integrated suppliers under your Settings → Integrations. Open Tern's AI Chat and ask for help with setting up a specific Tern integration setup..*

Have additional questions? Join an office hours session at tern.travel/events — look for "Q&A | Trip Building and Itineraries."

Step 4: Authorized Payments on Trips

Outcome: Manage client authorizations, log payments, and submit commissions for a trip — the core workflows that keep your revenue organized and reconciled.

[Prepare bookings for client authorization — 4-min tutorial](#)

[Set payment schedules and collect credit card authorizations — 10-min tutorial](#)

[Log a payment and mark an item as booked — 5-min tutorial](#)

Have additional questions? Join an office hours session at tern.travel/events — look for "Q&A | Trip Pricing, Packaging and Authorization."

Building Group Trips in Tern

 **17** Join the *Travmanity x Tern: Building Group Trips in Tern* training on Wednesday, September 9th for a live review of the below resources to get started in Tern.

Step 5 — build a Group Trip

Outcome: Build a Group trip in Tern from scratch — add travelers, create itinerary items, Sub-trip items, preview the client experience, and publish with confidence.

 *Pro Tip: Open Tern's AI Chat and start with the prompt "help me build a group trip"*

[Tern & Learn: Workflows on Group Trips](#)

[Tern & Learn: Managing Sub-Trips from the Group Level](#)

[Tern & Learn: Authorizations & Payments for Group Trips](#)

Step 6 — Creating a Landing Page

Outcome: Launch a group trip with a live landing page and manage sub-trips at scale. A large share of Travmanity's top earners run groups — this session doubles as a growth lever.

 *Pro Tip: Open Tern's AI Chat and start with the prompt "help me build a group trip"*

[Group Trip Landing Pages & Forms Training Guide](#)

[Creating Effective Landing Pages for Group Trips](#)

[Promoting Group Trips with AI — Landing Pages](#)

[Using a Landing Page to Manage Group Bookings](#)

[Group Landing Pages: Tips & Tricks](#)

Have additional questions? Join an office hours session at tern.travel/events — look for "Office Hours | Manage Group Trips in Tern"

Booking, Payments, Workflows & Reporting

 **17** Join the *Travmanity x Tern: Booking, Payments, Workflows & Reporting in Tern* training on Wednesday, September 9th for a live review of the below resources to get started in Tern.

Step 7 — Booking, Payments, Workflows & Reporting

Outcome: Get money collected correctly, submit bookings to the agency, then automate the repetitive parts and see your numbers.

[Tern & Learn: Authorized Payments & Commission](#)
[Payments & Authorizations in Tern](#)

Have additional questions? Join an office hours session at tern.travel/events — look for "Office Hours | Automate Your Process in Tern"

FAQ From Training sessions:

Session #2 Building a Trip in Tern:

Q: When adding travelers, do names need to match their passport/ID spelling? Not required upfront — first and last name are all that's needed to start. But verify names match ID documents by final payment (advisors typically audit this 90–120 days before departure).

Q: Do taxes get added automatically, or do we enter them? Tax is charged by the supplier, not calculated by Tern. You enter supplier pricing (taxes included); Tern just totals what you enter.

Q: Can we not book through Tern — do we book elsewhere and just input info? Correct, for most products (cruises, hotels, flights, FITs). Tern tracks the trip and handles CC authorization; you still book through the supplier. Exceptions: Project Expedition and insurance are bookable directly in Tern, and we are continuously exploring more opportunities to expand booking directly.

Q: Trouble finding how to add components to the itinerary. Use the library panel (right side) while editing an itinerary — search, then drag-and-drop or use the "+" button. You can also use Tern's AI chat inside the itinerary to build out structure.

Q: Is there a payment portal? Yes, for the client — they get a link, log in via magic code, and enter their card directly in the itinerary. You view authorized cards under "Active Authorizations" on your dashboard.

Q: Can you use the CC authorization feature without building a full trip? No, All Trip components live within a Trip and therefore any trip component that needs CC authorization must first be put into a trip. This allows your clients to review the entire itinerary and approve payment for each component.

Q: If you use a vendor like ALG for a quote, can you copy it into Tern? Yes, via AI chat import — paste in ALG booking data and the AI creates the contact, trip, and populates hotel/flights. Pricing isn't pulled in automatically yet. You can also use the ALG integration to pull in reservation confirmation ([Help doc.](#))

Q: Did the AI Agent pull the manually entered flight/hotel info? Yes — Tern's AI reads the current trip's data automatically, regardless of how it was entered.

Q: Where do travelers get taxed — home location or travel destination? Tax is set by the supplier, not based on where the client lives or travels from.

Q: Are additional notes internal-only, or client-visible? Depends on where you add them: the Advisor Tools notes panel is internal-only; payment/refund notes are client-visible.

Q: If it's a package, is only the deposit required? Yes, if you configure deposit + final balance. Final balance calculates automatically based on client selections.

Q: Will Tern do automatic payments? No. The client authorizes their card; the advisor manually charges the supplier and logs the payment in Tern.

Q: To clarify — Tern is NOT a booking engine, but a tracking tool? Correct, with the exception of Project Expedition and insurance, which are bookable directly in Tern.

Q: Can we add a company to integrate? For a full native integration request that we do not currently offer, please go to 'Help' > 'submit Feedback' and share your request for our team to track.

Q: What about group cruises individuals already booked elsewhere (e.g., MSC)? You can still add it to the trip for tracking, even though it wasn't booked through Tern. Note: "Mark as Booked" only updates Tern's records, not the supplier's.

Q: Do you have to enter contact info before integrating a booking from ALG? No — the ALG import can create/match the contact automatically from the booking data.