How We Take Client Payments

Last Updated
June 20, 2025

Travel advisors should never accept cash or checks for payments, opting instead for secure electronic transactions using their clients' credit card information. This practice offers several protections for advisors. Firstly, it minimizes the risk of theft or loss associated with handling physical money. Secondly, electronic payments provide a clear, traceable record of transactions, which is crucial for resolving disputes and maintaining accurate financial records. Additionally, using secure payment platforms helps protect against fraud, ensuring that advisors receive legitimate payments. By utilizing clients' credit card information, travel advisors can streamline the payment process and enhance the safety and reliability of financial transactions, allowing them to focus on providing excellent service to their clients.

At Wanderly Adventures, ensuring smooth and secure transactions is paramount to providing exceptional service to our clients. One critical aspect of this process is having clients fill out a payment authorization form every time they are making payments to vendors. This practice is not only a standard industry protocol but also a vital protective measure for both the travel advisor and the client.

Firstly, a payment authorization form serves as a formal agreement between the client and the travel agency. It clearly outlines the payment details, including the amount, the vendor, and the services being paid for. This transparency helps prevent any misunderstandings or discrepancies regarding the transaction. By having clients review and sign this form, travel advisors can ensure that clients are fully aware of the financial commitments they are making. Moreover, the payment authorization form acts as a safeguard in the event of a payment dispute. In the travel industry, disputes can arise for various reasons, such as dissatisfaction with services, changes in travel plans, or even fraudulent claims. When a client disputes a payment, having a signed authorization form provides concrete evidence that the client consented to the transaction. This documentation can be crucial in resolving disputes efficiently and fairly, protecting the travel advisor from potential financial losses and legal complications.

Additionally, the use of payment authorization forms enhances the professionalism and credibility of the travel agency. Clients are more likely to trust and feel secure with an agency that follows stringent financial protocols. This trust is essential for building long-term relationships and ensuring repeat business. It also reflects the agency's commitment to ethical practices and client satisfaction.

In conclusion, requiring clients to fill out a payment authorization form is a fundamental practice for travel advisors at Wanderly Adventures. It ensures transparency, provides protection in case of disputes, and enhances the agency's professionalism. By adhering to this protocol, travel advisors can offer a secure and reliable service, fostering trust and
confidence among their clients.

How to Create a Payment Authorization Form

Ensuring the secure receipt of payment authorization forms is crucial for protecting both the travel advisor and the client. Here are some recommended methods:

1. Customer Relationship Management (CRM) Systems: Many CRM systems offer secure ways to handle payment authorization forms. These systems can streamline the process and ensure that all sensitive information is stored securely.
2. TPISuitcase includes a PCI-compliant combination payment authorization form/credit card authorization form for free.
3. Encrypted Email: Use email encryption services to send and receive payment authorization forms. This ensures that the information is protected from unauthorized access during transmission.
4. Secure File Transfer Services: Services like DocuSign, Dropbox, Google Drive, or OneDrive offer secure file transfer options. Ensure that the files are encrypted and access is restricted to authorized personnel only.
5. Password-Protected Documents: If sending forms via email, ensure they are password-protected. Share the password through a different communication channel, such as a phone call or text message.
6. Itinerary Builder Systems like Travefy: Some itinerary builder systems, such as Travefy, also provide secure options for handling payment authorization forms.

These systems can integrate payment processing with itinerary management, offering a seamless and secure experience for both the travel advisor and the client. By implementing these methods, travel advisors can ensure that payment authorization forms are received securely, protecting both their clients and their business.