Tern Travel CRM Information

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Wanderly Adventures uses the TERN travel advisor CRM platform. Tern is a dedicated **all-in-one travel CRM and trip-planning platform** designed for travel advisors and agencies. It combines tools typically found in separate services—CRM, forms, itinerary builder, payment collection, automation, and reporting—into a single product.

TERN is more than just a CRM—it's your business growth partner. Designed specifically for travel advisors, TERN helps you scale your business with confidence by giving you the tools to stay organized, efficient, and client-focused. Whether you're just starting out or managing a growing book of business, TERN scales with you—helping you work smarter, not harder.

Here's what makes TERN a game-changer for your business:

☑ Built for Growth

- Automate repetitive tasks like follow-ups, reminders, and client communications so you can focus on selling and servicing.
- Track your sales pipeline and client journeys from inquiry to post-trip follow-up, giving you full visibility into your business performance.
- Centralize client data—no more spreadsheets or scattered notes. Everything is in one place, accessible from anywhere including client data such as passport info (auto parsed), loyalty programs, seating preferences, allergies and much more.
- Visually polished forms that automatically sync to client profile.
- Drag-and-drop itinerary builder with large cruise and hotel library.
- Secure authorization for credit card payments within the itinerary. Supports full, partial and deposit payments.
- AI-Assist can convert PDFs to itineraries and auto-parse emails for confirmation details.
- Built-in scheduling tool integrates with several calendar services (Gmail, Exchange, Office 365 and iCloud accounts).

☑ Designed for Collaboration

- Easily collaborate with your agency team and share trip details, notes, and updates.

💰 Pricing

- $20 per month
- Pre-billed quarterly (you will receive an invoice every 4 months)

📝 How to Sign Up

Follow these simple steps to get started:

1. Go to Tern.Travel
2. Sign up for a free trial
3. Go to the Help menu and search "TPI"
4. Click on the "How TPI Advisors Can Get Started with Tern"
5. Follow the instructions on that page
6. Send an email to info@wanderlyadventures.com to invite you to the agency account. This ensures you're properly connected to our agency setup.

☑ Learn While You Launch

Once you're signed up, head to the **Help Section** and enroll in: **"Tern & Learn"**

The *Tern and Learn* program is designed with one goal in mind: helping you make the most of your Tern experience.

Each lesson offers bite-sized, actionable insights that fit easily into your busy day. Whether you're just getting started or looking to deepen your expertise, they've created content that empowers you to streamline, collaborate, and grow with Tern.

Connecting Your Advisor Email to Tern

Tern offers the ability to send emails and automations directly from the CRM. Here are the way to properly link your email.

1. Log into Tern.Travel using the credentials you created above.
2. Click on your user profile in the upper right corner.
3. Click Settings
4. On the left side of the screen select Email & Scheduling
5. Click Connect Account
6. Enter the following information
    a. Your email address and the password
    b. If you are using an @WanderlyAdventures.com email address enter the following information
        i. IMAP (Incoming): Port 993 (SSL/TLS)
        ii. SMTP (Outgoing): Port 465 (SSL/TLS)
        iii. The domain for both is mail.WanderlyAdventures.com