



# TravelBuxx User Manual

The easy, illustrated guide for every role — applicants, front desk, case officers, admins, accountants and agency owners.

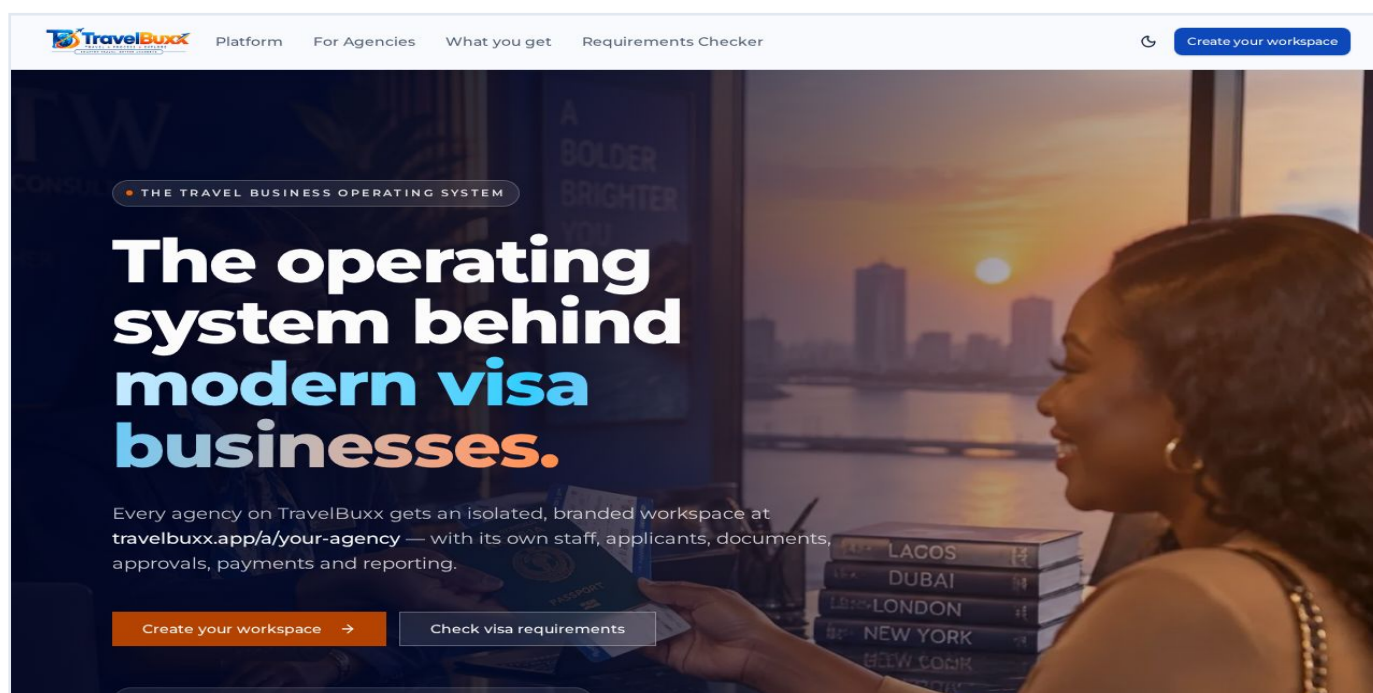
Edition: October 2026 · [travelbuxx.app/manual](https://travelbuxx.app/manual)

# Contents

|                                          |                     |
|------------------------------------------|---------------------|
| <b>1. Getting started</b>                | Everyone            |
| <b>2. Applicants &amp; travellers</b>    | Applicant           |
| <b>3. Receptionist / Front desk</b>      | Receptionist        |
| <b>4. Case Officers</b>                  | Case Officer        |
| <b>5. Admin / Head of Department</b>     | Admin / HOD         |
| <b>6. Accountants &amp; Finance desk</b> | Accountant          |
| <b>7. Super Admin / Agency Owner</b>     | Super Admin / Owner |
| <b>8. Onboarding a new agency</b>        | New agencies        |
| <b>9. Quick answers</b>                  |                     |

# Getting started

TravelBuxx is the operating system for visa and travel agencies. Every agency has its own private workspace — your agency's cases, clients, fees and messages are never visible to another agency.



- 1 Open your agency link**  
Use your agency address, e.g. [travelbuxx.app/a/your-agency](https://travelbuxx.app/a/your-agency). The address bar always shows which agency you are in.
- 2 Sign in**  
Choose your portal (Applicant, Case Officer, Admin/HOD, Accountant, Receptionist or Super Admin) and sign in with your email and password.
- 3 Secure your account**  
Super Admins must set up an authenticator app (two-step verification). Others can switch it on under Security.
- 4 Auto sign-out**  
For safety you are signed out after 30 minutes of inactivity. Your application drafts are saved automatically.

Tip: Forgot your password? Use 'Forgot password' on the sign-in page.

Tip: Lost your authenticator? Ask your Super Admin to reset it.

# Applicants & travellers

Apply for a visa, upload documents, confirm your form, pay invoices and track progress — all from your phone or computer.

## 1 Start an application

Pick your destination country and visa type. The form is built for that country and saves as you type — come back any time within 30 days.

## 2 Upload documents

Follow the checklist. Each item shows Missing, Pending review, Approved, or Needs replacement with the reviewer's reason.

## 3 Review & confirm your form

When your officer sends the completed form, check every answer. Press Confirm, or Request changes with a note.

## 4 Pay your invoice

Download the invoice, pay, then upload your receipt. Status moves from Missing → Pending → Paid once Finance verifies it.

## 5 Track your case

See your case reference, stage, appointments and the final embassy form to download. Messages and alerts appear in the bell icon.

**Tip:** You get an email only for important updates — log in to read the full message.

**Tip:** Family applications can be linked so everyone travels together.

# Receptionist / Front desk

Welcome walk-in clients, start applications on their behalf and keep a safe record of every passport that enters the office.

- 1 Front Desk overview**  
Your dashboard shows today's counts and shortcuts: New application, Passport intake, Assign case, Client lookup.
- 2 Log a passport**  
Passport tracking → enter Full name (free text), Item type, optional Linked profile and case, Handed to (staff) and notes.
- 3 Hand over safely**  
Every handover is timestamped and kept in the history, so you always know who holds a passport.
- 4 Search the register**  
Filter by name, linked case, assigned staff or date.

# Case Officers

Work your assigned cases from first upload to embassy submission.

- 1 Assisted application**  
Create an application for a client who cannot fill it themselves.
- 2 Review documents**  
On each case, use the checklist to Approve, Reject (a reason is required) or mark N/A. Select several items for bulk actions.
- 3 Send the form for confirmation**  
Use 'Send form to applicant'. The applicant confirms or asks for changes; every round is recorded.
- 4 Activate payment**  
Activate payment on the case — the Accountant sets the amount and issues the invoice.
- 5 Submission readiness**  
The case shows 'Ready to submit' only when all documents are Approved/N/A, the form is confirmed and fees are paid.
- 6 Upload the final embassy form**  
Upload the final form (up to 20 MB) so the applicant can download it.

Tip: Staff can never delete applicant documents — request a replacement instead.

# Admin / Head of Department

Distribute work, watch deadlines and keep the team moving.

1

## **My cases & All cases**

See every case in the agency. Filter by stage, officer, or 'Embassy ready'.

2

## **Assign in bulk**

Select cases and assign an officer or change status in one go.

3

## **Document review queue**

Open documents awaiting review across all cases.

4

## **Deadlines (SLAs)**

Stage time limits flag overdue cases so nothing is forgotten.

5

## **Team & invitations**

Invite staff, resend invitations, or send a test invitation to yourself first.

# Accountants & Finance desk

Only Accountants issue invoices and record payments. All amounts are in Naira (₦) by default.



- 1 Finance inbox**  
Activated cases arrive with applicant, case reference and officer details.
- 2 Create the invoice**  
Upload the QuickBooks invoice, enter the amount and Send for approval.
- 3 Returned for changes**  
If the Super Admin returns it, read the note, fix and resubmit.
- 4 Verify receipts**  
'Receipts to verify' lists uploaded receipts. Verify (Paid), Reject (new receipt needed) or Request correction.
- 5 Transaction register**  
Every payment receives a number like TXN-2610-0001. Record expenses and petty cash too.

Tip: Every step is logged in the invoice audit trail with names, times and notes.

# Super Admin / Agency Owner

The final decision-maker for the agency: approvals, payments, staff and settings.

1

## **Final verdicts**

Approve cases and payments that are waiting for Super Admin approval.

2

## **Approve invoices**

Edit, Return with a note, or Approve & send to the applicant.

3

## **Team messages**

Message one staff member or broadcast to Everyone in the agency.

4

## **Staff & roles**

Invite staff, choose access levels, reset authenticators, review audit history.

5

## **Passport tracking & documents**

See the passport register and document review queue from your own workspace.

# Onboarding a new agency

Any travel agency can join TravelBuxx online through a six-step form at [travelbuxx.app/start](https://travelbuxx.app/start). It takes about 15 minutes. Have your CAC papers, IDs and company details ready before you begin.

← Back to TravelBuxx

## Agency onboarding

Create your branded workspace and complete business verification securely online.

Step 1 of 6 Business

**Business**

Core registration and company information.

Agency / trading name \*

Legal business / company name \*

CAC registration number \*

Business type \*

Select business type

Date of incorporation / registration \*

mm/dd/yyyy

Website

https://

Registered business address \*

City \*

State / region

Postal code

### 1 Before you start — what you need

CAC registration certificate, an ID for a director or beneficial owner, an ID for the authorised representative (PDF, PNG or JPG, max 10 MB each), your TIN, official company email and phone, and optionally your logo and brand colour.

### 2 Step 1 · Business

Enter trading name, legal company name, CAC registration number, business type, date of incorporation, website (optional), registered address, city, state and postal code.

### 3 Step 2 · Ownership

List every director and beneficial owner with their full name and capacity (Director, Beneficial owner, or both). Use 'Add another person' for more than one.

### 4 Step 3 · Representative

Name the authorised representative and their position, plus the official company email, phone, Tax Identification Number (TIN) and operational address. This person becomes the agency's first Super Admin.

### 5 Step 4 · Profile

Describe your travel services, choose expected monthly application volume and pick your workspace address ([travelbuxx.app/a/your-agency](https://travelbuxx.app/a/your-agency)) — a green tick shows it is available. Upload your logo and set your brand colour.

**6****Step 5 · Documents**

Upload the three verification documents: CAC certificate, director/owner ID and representative ID. Files are private and only seen by authorised reviewers.

**7****Step 6 · Review & declare**

Check the summary, tick the declaration that all information is true, type the representative's full name and Submit.

**8****Get your reference & track status**

You receive an acknowledgement email with a reference number. Use 'Check my application status' ([travelbuxx.app/start/status](https://travelbuxx.app/start/status)) any time: Under review → Approved or Not approved. Reviews usually take 1-2 working days.

**9****Approval & first sign-in**

When approved, the representative receives an email to set a password and set up an authenticator app. You then sign in as Super Admin at your workspace address.

**10****Set up your workspace**

Invite staff (Admin/HOD, Case Officers, Accountant, Receptionist), add your countries, visa types and fees, set stage deadlines, and share your agency link with clients.

Tip: You can't skip steps — each step checks required fields before you continue.

Tip: If not approved, contact support from the status page; we will help you correct it.

Tip: Use an email you check often — all onboarding updates go to the official company email.

# Quick answers

## **I'm in the wrong workspace.**

Sign out, then sign in from the portal for your role (e.g. Admin, not Super Admin).

## **My invitation email didn't arrive.**

Check spam, then ask your admin to resend or copy the invitation link.

## **Why can't I submit to the embassy?**

All documents must be Approved/N/A, the form confirmed and fees paid.

## **Who can change the invoice amount?**

Only Accountants (and the Super Admin when approving).