



COMPASS

Compass Plans

Three Compass plans (Individual, Team, Host Agency), what each includes, how seats work, free trial, and how to change plans.

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Compass offers three subscription plans. The editor, templates, custom domain, branded PDFs, analytics, snippets, and private SOPs are included on all three — the tiers differ only in **seat count** (how many advisors can use the same agency library).

ADVISOR TIP

See current pricing on the Compass plans page in your account. We don't document prices in this guide so they're never out of date.

Available Plans

Compass Individual

For solo advisors. Your public travel site plus a private SOP library so you're ready the day you add a teammate.

- 1 advisor seat
- Copy for Email — paste full guides into Gmail, Outlook, or Apple Mail with formatting intact
- Notion-style editor with travel-specific blocks
- Pre-loaded starter guides + templates
- Your own custom domain (CNAME)
- Branded PDF exports
- Per-guide view and download analytics
- Reusable snippets
- Private SOPs (never leak to public)

Compass Team

For agencies with multiple advisors sharing guides, templates, and internal SOPs.

- Up to 5 advisor seats
- Everything in Individual
- Priority support

Compass Host Agency

More than 5 advisors. Designed for host agencies and larger teams.

- Unlimited advisor seats
- Dedicated onboarding
- Dedicated account manager
- Everything in Team
- Custom pricing

What All Plans Include

- Full editor with all block types (Callout, FAQ, Itinerary, Columns, Tables, HtmlBlock, ToC, more)
- All four visibility levels (Private, Team, Client, Public)
- Custom-domain hosting with free SSL
- Branded PDF exports
- Copy-for-Email
- Snippets and reusable blocks
- Categories and search
- View and PDF-download analytics per guide
- SEO-friendly public site

How Seats Work

- A "seat" = one logged-in advisor with access to your agency library
- All seats in your org share the same guides, snippets, blocks, branding, and custom domain
- Each advisor has their own author attribution — you can see who wrote what in guide history

- Inviting a new seat: go to **Settings** → **Users** → **Invite**
- If you exceed your seat count, Compass shows an upgrade prompt before completing the invite

Changing Plans

1. Go to **Settings** → **Billing**
2. Click **Change Plan**
3. Stripe Checkout opens for new subscriptions; existing subscriptions update immediately
4. Upgrades take effect right away
5. Downgrades take effect at the end of your billing period

If you downgrade past your seat count (e.g., from Team with 4 active advisors down to Individual which allows 1), the extra advisors keep their access until the downgrade fully completes. You'll see a banner asking you to remove the extras before the period ends.

Free Trial

Both Compass Individual and Compass Team include a 30-day free trial. No credit card required to start; you only enter billing if you decide to continue past day 30. Cancel any time during the trial.

Cancellation

Cancel any time from **Settings** → **Billing**. You keep access until the end of your billing period. Your guides, snippets, branding, and custom domain stay intact for 90 days after cancellation in case you re-subscribe. After 90 days, the data is permanently deleted.