



Email Series — automate your trip follow-ups

Email Series turn your best follow-up sequences into automation: build an ordered set of email steps once, assign it to a trip, and the right emails send at the right time — from your own mailbox, with attachments and merge tags handled. Covers building a series, trigger types, send times, assigning, and per-trip skip/reschedule overrides.

Email Series turn your best follow-up sequences into automation. Instead of remembering to email every client at every milestone of a trip, you build the sequence once and assign it — the right emails go out at the right time, from your own mailbox, with attachments and merge tags handled for you.

ADVISOR TIP

In a hurry? Build a series in Settings → Email series, add ordered steps (each picks an email template + when to send), then open a trip → Email Series tab → Assign. The first step can fire the moment you assign it.

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What is an Email Series?

An Email Series is a named, ordered set of email steps. Each step points to one of your Email Templates and defines when it should send relative to the trip. Once you assign a series to a trip, Trips schedules every step automatically and sends each one on time — from the trip's primary agent's connected mailbox — so every message looks personal, not automated.

Common uses: a cruise pre-departure sequence (booking confirmation → what's included → packing guide → embarkation prep), a post-trip flow (welcome home → review request → rebooking offer), or an onboarding drip for new inquiries.

IMPORTANT

Series emails are real messages. Every step that fires is logged in the trip's Messages tab and appears in the client portal — and if the client replies, it threads back into that trip conversation. Nothing sends silently in the background.

Before you start: templates and mailbox

A series is built from Email Templates, so create those first (Settings → Email templates). Each template holds a subject line and body, supports merge tags like the client's first name, and can carry attachments that ride along automatically whenever the template is used.

- **Templates** — write the actual email content once; reuse across many series and trips.
- **Merge tags** — personalize the subject and body (e.g. first name, trip name); real values fill in at send time.
- **Attachments** — a PDF attached to a template is sent every time that template goes out, including from a series.
- **Connected mailbox** — series emails send from the trip's primary agent's connected Gmail, so replies land in your inbox and the message looks personal.

Building a series

Go to Settings → Email series → New series. Give it a name (e.g. "Virgin Voyages"), then add steps. Each step is one email in the sequence.

Each step has four parts

1. **A name** — for your reference (e.g. "One Week Countdown").
2. **A template** — the email that gets sent.
3. **A trigger** — when it fires (see the table below).
4. **Recipients** — who receives it: primary traveler, all travelers, primary agent, or all agents. At least one is required.

Drag steps to reorder them. The visual timeline shows the whole sequence at a glance, and a preview modal recaps exactly what will send, to whom, and when.

Trigger types (when a step sends)

Each step fires relative to an anchor plus an offset in days. The available anchors:

Trigger	Fires...	Good for
Days after added to trip	Relative to when you assign the series	Kickoff / welcome emails, onboarding drips
Days after the previous email	Relative to when the prior step actually sent	Even-cadence drips ("every few days")
Days before trip start	Counting down to departure	Packing lists, countdowns, embarkation prep
Days after trip start	After the trip begins	Mid-trip check-ins
Days before trip ends	Just before the trip wraps	Onboard reminders, last-day nudges
Days after trip ends	After the client returns	Welcome-home notes, reviews, rebooking

ADVISOR TIP

Date-anchored steps follow the trip. If you change a trip's start or end date, the countdown steps automatically recompute to the new dates — you don't have to touch the series.

Send time — a set hour or "as soon as it's due"

For each step you can either pick a specific time of day (e.g. 9:00 AM in your agency's timezone) or check "Send as soon as it's due."

Option	Behavior
At a specific time	Sends at that clock time, in your agency timezone, on the day it's due.
As soon as it's due	Sends on the next automated check (within ~5 minutes) — a launch email set to "0 days after added" goes out right when you assign the series.

IMPORTANT

Times are in your agency timezone. A step set to 9:00 AM sends at 9 AM local to your agency (set under Branding & Agency), not UTC.

Assigning a series to a trip

Open a trip and go to the Email Series tab. Choose a series from "Add a series..." and click Assign. From there you'll see every step with its computed send date for this specific trip.

- **Pause / Resume** — temporarily stop the whole series for this trip, then pick it back up.
- **Remove** — detach the series from this trip (its history for this trip is cleared; the series itself is untouched).

Adjusting a series for one trip

Sometimes the default schedule isn't ideal for a particular trip — a rebooking email might land on a holiday, or a client asks you to hold off. On the trip's Email Series tab, each upcoming step has its own controls:

Control	What it does	Affects other trips?
Reschedule	Move that step to a specific date and time — for this trip only.	No
Skip	Turn off that one email for this trip. The rest of the series continues.	No
Reset to default	Clear a skip or reschedule and snap the step back to the series default.	No

ADVISOR TIP

Example: a rebooking follow-up falls on Christmas Eve. Open the trip's Email Series tab, find that step, and either Skip it or Reschedule it to a friendlier day — every other trip using the same series is unaffected.

Steps that have already sent are locked — the send log is the record of what actually went out and can't be changed.

What sends, and where it shows up

- **From your mailbox** — each email sends from the trip's primary agent's connected Gmail.
 - **In Messages** — every fired step is logged in the trip's Messages tab and the client portal thread.
 - **Replies thread back** — if the client replies, it comes back into the same trip conversation.
 - **Sent once each** — a step sends a single time per trip; the system won't double-send if it re-checks.
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Frequently asked questions

Can I assign more than one series to a trip?

Yes. A trip can have multiple series assigned at once — for example a pre-trip prep sequence and a post-trip follow-up. Each runs on its own schedule.

If I change the trip's dates, does the schedule update?

Yes — automatically. Series steps aren't stored with fixed dates; the schedule is recomputed from the trip's current dates. Date-anchored steps (before start, after end, etc.) move to match the new dates on the next check. Your per-trip skips and reschedules are preserved.

How do I stop one email without stopping the whole series?

On the trip's Email Series tab, find the step and click Skip. Only that email is turned off for that trip; the rest of the series keeps sending. Use Reset to default to bring it back.

Will editing a series affect trips it's already assigned to?

Editing the series template changes what future sends look like for trips using it. Steps that have already sent are logged and unchanged. Per-trip overrides (skip / reschedule) always take precedence over the template for that trip.

Do template attachments come along on a series email?

Yes. Any file attached to the step's email template is automatically attached when the series sends that step — the same as if you'd attached it in the composer.

What timezone do the send times use?

Your agency timezone, set under Settings → Branding & Agency. A step scheduled for 9:00 AM sends at 9 AM local to your agency.

Can a launch email go out immediately when I assign the series?

Yes. Set the first step to "0 days after added to trip" and check "Send as soon as it's due." It goes out on the next automated check, within about five minutes of assigning.