



TRIPS

# Forms (intake, traveler info, passport)

Build a form once, share a link, collect structured client responses on your branded portal. Use forms for new-client intake, per-trip traveler info, passport collection, signed release waivers, and marketing opt-in capture.

## On this page

- [Two kinds of form — pick on create](#)
  - [Trip-attached](#)
  - [New inquiry](#)
- [Build — drag fields onto the canvas](#)
- [Share — mint a link](#)
- [Submit — what the client sees](#)
- [Review — submissions land on the trip](#)
- [Marketing opt-in fields](#)
- [Frequently asked](#)
- [Related](#)

Trips **Forms** is a build-once-share-anywhere data collection surface — agents drag fields onto a canvas, publish, and send the link to clients. Submissions land back on the trip (or as a new inquiry) with the data already parsed and routed: identity fields write to the contact, passport scans land in the encrypted passport vault, signatures stamp a legal-binding audit trail.

### ADVISOR TIP

**Use forms instead of email Q-and-A.** Asking for passport details, dietary restrictions, or emergency contacts by email puts that data in inboxes and means agents have to retype it. A form captures it structured and writes it into the right place automatically.

## Two kinds of form — pick on create

Trips forms come in two shapes, and the difference matters for what happens after the client submits.

### Trip-attached

- Linked to a specific trip when you mint the share link.
- Submissions land on that trip's Forms tab.
- Identity fields overwrite the existing contact on the trip.
- Default link expiry: **14 days**.
- Use for passport collection, pre-trip traveler info, release waivers.

### New inquiry

- Standalone — no trip linked.
- Submission mints a new contact AND a new trip in the inquiry stage.
- Embeddable on your marketing site (the public surface allows iframe embed).
- Default link expiry: **90 days**.
- Use for "Plan my trip" lead forms.

You pick the kind on **+ New form** and it's fixed for the life of that form. Forms also have a lifecycle: **Draft** → **Published** → **Archived**. Drafts have no public link; archiving revokes every live share link in a single action.

## Build — drag fields onto the canvas

The form builder is a drag-and-drop canvas. Available field types:

- **Single-line text, multi-line text, email, phone, date, number**
- **Single-select, multi-select, checkbox, curated combobox** (airline, hotel chain, loyalty program — pulled from Core's curated reference list)
- **Signature** — drawn pad OR typed name, both legally binding under ESIGN / eIDAS when paired with the auto-captured audit trail.
- **File upload** — accepts PDFs and images; routes to the trip's Files tab OR to the passport vault depending on a per-field setting.
- **Marketing opt-in** — checkbox with consent snapshot; on submission, pushes the client to your Marketing audience(s).
- **Section header, two-column row** — layout only, no input.

Two settings on most fields matter beyond label and required-flag.

- **contactKey** — tells the post-processor which identity slot this field maps to. Common values: `first_name`, `last_name`, `email`, `phone`, `date_of_birth`. Prefix with `trips:` (e.g. `trips:passport_number`) to write to a Trips-only column instead of Core identity. Trips columns have an allowlist — typos are silently dropped so a misnamed field can't blow up the submission.
- **routeTo** (file fields only) — `trip` lands the upload in the trip's Files tab; `contact` lands it in the passport vault. Pick `contact` for passport scans, `trip` for everything else.

### ADVISOR TIP

**Identity fields on a trip-attached form overwrite the contact.** If the client corrects a typo in their last name or updates their phone number, the submission writes through to the contact record (and synced back to Core). Use this — it's the whole point — but be aware your contact data is mutable from the client side once they have the form link.

## Share — mint a link

On the form's detail page, click **Share** to mint a link. For trip-attached forms, pick the trip first — Trips pre-fills the client's existing contact data into the form so they only edit what's stale instead of retyping. The link looks like `/f/{token}` served from your branded portal host.

You can override expiry at mint time (1 day to 10 years). The same form can have multiple live links — one per trip, one for a different traveler — and you can revoke any one of them individually without taking the form down.

#### ADVISOR TIP

**Public forms are gated by the token, not by a login.** Anyone with the URL can submit. Treat share links like passwords — don't paste them into public chat, and revoke a link the moment you suspect it leaked.

## Submit — what the client sees

The client clicks the link and lands on your branded form: agency logo, agency brand color on the submit button, the card background you picked in settings. They fill in answers, drop files into upload fields, sign at the bottom if you put a signature block in.

Two protections run silently before we accept the submission:

- **reCAPTCHA v3** — Google scores the session as bot-shaped or human. Low-score submissions are rejected with a "looked automated" message before they touch the database.
- **Server-side schema validation** — we re-validate every field against the schema rather than trusting the client's validation pass. Required fields must be filled, curated combobox values must match the option list, signature fields must have either drawn strokes or a typed name.

Once a signature is captured, the submission row is **locked** — the client can't come back and edit. That's what makes the audit trail (typed name + signed-at timestamp + IP + user agent) legally meaningful.

## Review — submissions land on the trip

Trip-attached submissions show on the trip's **Forms** tab. New-inquiry submissions create a new trip in your inquiry pipeline (status configurable per form) and a new contact. Open the submission to see every answer, the signature image and audit metadata if signed, and any file uploads.

Uploaded files are already in the right place: passport scans in the contact's encrypted passport vault, other files in the trip's Files tab. See [the passport collection workflow](#) for the passport-specific pipeline.

## Marketing opt-in fields

Drop a **marketing\_opt\_in** checkbox on the form and tag it with one or more audience IDs. When the client ticks the box and submits, Trips snapshots the consent text + timestamp + IP and queues a bridge job to push the client to Marketing as an opted-in subscriber. The snapshot is the legal record; the bridge is async so a Marketing outage never blocks the submission.

## Frequently asked

### Can I copy a form between agencies (e.g. mine and a host agency's)?

Not today — forms are per-org. You can duplicate within your agency from the form's detail page; cross-org export is a future enhancement.

### What happens if the client closes the tab mid-fill?

No autosave. The submission only persists when they click **Submit** and the server validates successfully. For long forms (passport collection with files), consider splitting into two shorter forms.

### Can I email a copy of the response to the client?

The confirmation screen can include a custom headline, body, and CTA button you set per form. The client doesn't get an automatic email copy of their answers; if they need one for their records, ask them to use **Print** on the confirmation page.

### Can I see who opened the form without submitting?

Yes — the share link tracks **view\_count** and **last viewed at**. The share-link list on the form's detail page surfaces both. You can't see *who* opened it (the public URL is anonymous until they submit) — only that someone did.

## Related

- [Passport collection workflow](#)
- [Trip files](#)
- [Sharing proposals and e-signature](#)
- [The branded client portal](#)