URTRAVELPRO

TRIPS

Trips — Getting Started

A 30-minute roadmap for your first week in Trips: customize your pipeline, set up branding, build your first trip, send your first invoice, and invite your first client to the portal.

Prepared by System Generated · June 10, 2026

On this page

Trips is the travel-native CRM inside UrTravelPro. This article walks you through the five things to do in your first week — in the order that makes the rest of the app feel obvious.

> ADVISOR TIP
>
> **You can skip ahead.** If you already have an active trip you want to dive straight into, jump to **Build your first trip** below. The settings work can wait — Trips ships with sensible defaults.

Day one — sign in

Trips uses Single Sign-On with your UrTravelPro account. Head to trips.urtravelpro.com (or click **Trips** from your Core dashboard's app launcher) and you'll be redirected through Core. Once authenticated you land on your Trips dashboard.

Already on Books, Marketing, or Compass? Same account. Sign in with the same email you use for those apps — no separate registration.

> ADVISOR TIP
>
> **Your organization, members, and billing live in Core.** Trips is read-only on those — to invite a teammate, change a role, or update your subscription, you head to Core. We link out to the right pages from inside Trips wherever it matters.

Customize your pipeline (5 minutes)

Trip statuses are the columns your trips move through — Inquiry, Proposed, Booked, In Progress, Completed, etc. Every agency runs their pipeline a little differently, and Trips lets you rename, recolor, and reorder these statuses to match how you actually work.

1. **Open Settings → Trip statuses.**
2. Click **Edit** on any status to rename it, change its color, or toggle the **Client-facing** flag.
3. Drag to reorder. The order here is the order they appear in the status picker and on lists across the app.
4. Add new statuses with the **+ New status** button. There's no limit.

ADVISOR TIP

Client-facing vs internal-only. Statuses you mark client-facing appear on the client portal trip card; internal-only statuses don't. Use internal-only for things like *"Waiting on supplier confirmation"* that you don't want clients to see.

Set up branding (5 minutes)

Your branding shows up on every client-facing surface — proposals, invoices, the portal, emails. Get this right once and you don't think about it again.

What to set

- **Logo** — PNG with transparent background works best, 400 px wide or larger.
- **Brand color** — used for buttons, accents, payment receipts.
- **Identity** — agency name, address, phone, website, support email. Appears in invoice footers and portal welcome.
- **Default trip cover** — fallback photo used whenever a specific trip doesn't have its own.

Where to set it

All four sections live under **Settings → Branding & Agency** as separate cards. Make changes in any order — each card saves independently.

Build your first trip

A trip is the unit of work in Trips. Everything else — proposals, invoices, files, todos, messages — lives on a trip.

1. From the dashboard's Quick Actions widget (or from **/trips**), click **+ New trip**.
2. Give the trip a name (the client-facing title) and add at least one traveler — pick an existing contact or create a new one inline. Those two are the only required fields.
3. Optional but recommended: start + end dates, destinations, trip type, status. You can fill these in now or come back later.
4. Save. You land on the trip's detail page.

> ADVISOR TIP
>
> **Don't overthink the trip name.** Use what the client uses. `"Smith Family Mexico"` is better than `"SMITH-2027-001"`. The trip's internal ID is autogenerated and stays out of the client's view.

Send your first invoice

Trips has two kinds of invoices, and choosing the right one matters:

Supplier Invoice

Track-only. Used for what the client owes a supplier (Royal Caribbean, Marriott, a tour operator). Payment happens outside Trips — Trips tracks the due date, deposit + final schedule, and commission per line.

Use this for ~95% of invoices.

Direct Invoice

Card-processing. Used for charging your own planning fees through your connected Stripe account. The client pays the invoice inside their portal — funds settle to you in the background.

Requires Stripe Connect setup. See the dedicated article.

From the trip detail page, click **+ Create** and pick the invoice type. Add line items (supplier, amount, commission), schedule deposit + final if you want a split, and share. The client clicks the share link, sees the invoice on your branded portal, and either pays (Direct) or sees due dates and pays the supplier directly (Supplier).

Invite your first client to the portal

The client portal lives at `your-agency.urtravelpro.com/portal` (or your custom domain — see the Custom Domain article). Clients sign in with a magic link emailed to them. They see their trips, proposals, invoices, files, forms, and a messages thread to your team.

1. Open the trip's detail page and find the travelers strip near the top.
2. Click the contact's row → **Invite to portal**.

3. A magic-link email goes out immediately. The link is valid for 7 days; the client can request a new one anytime, and you can resend from the same row.

ADVISOR TIP

Auto-invite on first share. You can turn on a setting that auto-mints a portal invite the first time you share a proposal or invoice on a trip — **Settings → Client portal** under **Auto-invite to portal**. Off by default so agencies opt in when they're ready.

What to do next

You now have the basics. The articles below cover the rest of the surface — each one is short and focused on one topic. Read them as the situation comes up; you don't have to read them in order.

- The Trip page, top to bottom
- Build a proposal or itinerary
- Stripe Connect setup
- Books integration
- Custom domain setup

Troubleshooting

I signed in but Trips says "no entitlement" — what gives?

Your account exists in Core, but no one has granted you Trips access. Owners and admins of your agency inherit access to every app automatically; members need explicit per-app access. Ask your agency owner to open `core.urtravelpro.com/organization/users`, click your row, and check **Trips** under app access.

I can't find the dashboard widget I had yesterday.

Dashboard widgets are reorderable and dismissable per agent. Click **Customize** at the top right of the dashboard to enter edit mode; a **Restore widget** menu appears next to it once you've hidden anything. Drag widgets to reorder, click the X on a widget to hide it, then click **Done** to save.

My logo looks fuzzy on proposals.

Upload a PNG that's at least 400 px wide. Trips serves the image at retina density on most client surfaces. Sub-200 px logos look soft on a Retina screen.

My client says they didn't get the portal invite email.

Three things to check, in order: (1) Spam folder — the email comes from Postmark on behalf of `your-agency.urtravelpro.com`, (2) the email address on the contact record is correct, and (3) you haven't hit a delivery block. Open the trip → **Travelers** → click the contact and use **Resend portal invite**. Still nothing? Open a support ticket and we'll trace the delivery in Postmark.

Related

- The Trip page, top to bottom
- Customize your pipeline
- The branded client portal
- Books integration