



TRIPS

Direct Invoices (charge planning fees via Stripe)

How Direct Invoices work in Trips: charging your own planning, consultation, and service fees through your branded client portal via Stripe. What to put on one, how the client pays, the fee math, and how refunds work.

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A **Direct Invoice** is what you use to charge for your own work — planning fees, consultation, change fees. The client pays on a card inside your branded portal and the funds settle into your connected Stripe account. The other kind — **Supplier Invoice** — is for what the client owes a tour operator, cruise line, or hotel; Trips just tracks the schedule there.

ADVISOR TIP

The client pays inside your branded portal. They never log into Stripe. You never log into Stripe to send an invoice. The pay form lives on the invoice page itself.

What a Direct Invoice is for

Use one when you want to collect money on a card for your own work — planning, consultation, change fees. What it is **not** for: the price of the cruise, hotel, or tour. Those are Supplier Invoices. About 95% of your invoices will be Supplier.

Direct Invoice

- For **your own fees**
- Client pays online with a card
- Funds settle to your Stripe account
- No commission tracking
- Requires Stripe Connect setup

Supplier Invoice

- For what the client owes a **supplier**
- Payment happens outside Trips
- Tracks deposit + final schedule
- Records commission per line
- No Stripe setup required

Creating a Direct Invoice

From any trip detail page, click **+ Create** → **Invoice**. A modal opens with two tiles — **Supplier** and **Direct**. Pick **Direct Invoice** and you land on the invoice builder.

ADVISOR TIP

Direct tile greyed out? Your agency hasn't finished connecting Stripe yet. Click **Set up direct payments** on the greyed-out tile (or open **Payments** from the sidebar). See the [Stripe Connect setup](#) article. Supplier Invoices still work fine in the meantime.

The builder looks almost identical to a Supplier Invoice, with two differences: **no commission section on line items** (no supplier in between), and a **Pay** button on the published client view. Everything else — [line items](#), payment terms, the bill-to snapshot, the share link — works the same.

ADVISOR TIP

Set Direct defaults once. Open **Settings** → **Invoices** to preset a default payment term, terms-and-conditions block, and first-line description (e.g. "*Travel planning fee*").

How the client pays

When you click **Share**, Trips mints a link on your branded portal (your custom domain if you have one, otherwise your `-agency.urtravelpro.com`). Copy and text it, or use the **Send** button to email it from your connected Gmail.

The client clicks the link and sees the invoice — your logo, your colors, the total, and a **Pay** button. They tap **Pay**, the pay form expands inline, they enter card details (or use Apple Pay / Google Pay), and confirm. The whole thing happens on your portal page; they never get bounced to stripe.com or asked to make an account.

When the payment succeeds, the funds land in your Stripe account on Stripe's standard payout schedule, Trips records the payment automatically (amount, card brand, last 4, cardholder name), the invoice flips to **Paid** (or **Partially paid** on a deposit milestone), the client gets a receipt, and you get a bell notification.

ADVISOR TIP

What if the client closes the browser before it finishes? Stripe notifies Trips a moment later and the payment still records. You don't have to do anything. The same payment never records twice.

The fee math

Two fees come off every Direct Invoice payment: **Stripe's processing fee** (for US cards, **2.9% + 30¢** per successful charge), and a **small UrTravelPro platform fee** on top. The client is charged the full invoice amount; Stripe deducts both fees and the rest settles to your Stripe balance. The exact split shows on the payment row inside Trips and on your Stripe dashboard under **Payments**.

ADVISOR TIP

Pricing tip. If a \$500 fee feels light after the processing cuts, charge \$525. Build the fees into your price the way every other card-accepting business does.

Refunds

Refunds go through Stripe — the money was on a real card, so it has to be refunded to that card. Open the invoice, find the payment in the **Payments** section, click the menu on the payment row, and pick **Refund via Stripe**. Enter the amount (defaults to the full remaining refundable balance) and confirm. Trips calls Stripe, Stripe refunds the card, and the refund records on the invoice as a negative payment row.

Full or partial refunds both work, and you can issue multiple partials against the same payment until the full amount is returned.

ADVISOR TIP

Fees on refunds. Stripe refunds the UrTravelPro platform fee proportionally with the refund. The agency only eats Stripe's processing fee on the original charge — standard Stripe default behavior.

Troubleshooting

The Direct tile is greyed out — why?

Your Stripe account isn't ready to charge yet. Click **Set up direct payments** on the greyed-out tile to finish setup, or see the [Stripe Connect troubleshooting](#) article.

The client paid but the invoice still says Unpaid.

Refresh the invoice. Trips records the payment immediately when the client's browser confirms, or a moment later when Stripe notifies Trips. If it's still Unpaid after a minute, see the [Stripe Connect troubleshooting](#) article.

The client got "Your card was declined" on the pay form.

That message comes from the client's bank, not Trips. Ask them to call the number on the back of the card to authorize the charge, then try again.

Can I refund a Direct Invoice without going through Stripe?

No. The money was charged on a real card, so it has to be refunded to that card. **Refund via Stripe** on the payment row is the only path.

Related

- [Setting up Stripe Connect](#)
- [Supplier Invoices \(track-only\)](#)
- [Invoice line items](#)
- [Stripe Connect troubleshooting](#)