



TRIPS

Building an itinerary day-by-day

The itinerary builder, top to bottom: add days, drop in flights and hotels and transfers, handle multi-night stays, share a live calendar feed, and export a polished PDF the client can print at the airport.

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An **itinerary** in Trips is the confirmed plan you hand a client after the deposit lands — day-by-day, with airline confirmation numbers, hotel check-in times, cruise terminals, and transfer pickup locations all in one place.

ADVISOR TIP

Shares a builder with proposals. Everything in this article works the same way in the proposal builder — see [Building a proposal day-by-day](#) for the shared mechanics. This one zooms in on the moves that matter most after a trip is booked.

Days are the spine

Every itinerary is a stack of day cards in the middle of the builder. Each card has a date, an optional title (think *"Arrive in Santorini"* or *"Sail from Miami"*), an optional narrative paragraph, and the blocks the traveler does that day.

1. **Add a day.** Click **+ Add day** at the top or bottom of the day stack. Trips appends a new empty day with the next sequential date if your trip has start/end dates set.
2. **Edit the date or title.** Click the day card to open the day editor drawer on the left. Change the date, give it a title, write a short narrative. Autosaves on blur.
3. **Reorder.** Grab the drag handle on a day card (in the outline panel on the right) and drag it up or down. Day numbers renumber themselves.
4. **Delete.** Inside the day card, click the trash icon. Trips asks you to confirm — every block on that day disappears with it, so be deliberate.
5. **Fill days from the trip dates.** If the trip has a start and end date, the **Fill days from trip** button generates one day card per night in one click. Great for skeleton-then-fill workflows.

Block types you can drop into a day

Each day holds a sequence of **blocks** — the individual line items that show up on the printed page and the public itinerary URL. Open the block picker from inside any day, pick a type, fill the form on the left drawer, save. The block lands in the day in the order you added it, and you can drag to reorder.

Travel blocks (the meat)

- **Flight** — airline, flight number, from/to airports, depart + arrive times, cabin, confirmation.
- **Lodging** — hotel name, address, check-in + check-out dates, room type, confirmation.
- **Cruise** — line, ship, sail-from + sail-to dates, depart + return port, cabin category, cabin number, confirmation.
- **Rail** — operator, train number, from + to stations, depart + arrive times, confirmation.
- **Car rental** — vendor, vehicle class, pickup + drop-off date/time and location, confirmation.
- **Transfer** — type (private car, shuttle, taxi), vendor, pickup date/time and location, drop-off location, confirmation.
- **Tour package** — name, operator, start + end date, duration, confirmation.

Day-fillers

- **Activity** — anything not in the structured types: museum visit, free morning, beach. Name, when, location.
- **Restaurant** — name, address, time, reservation number.
- **Note / Info** — free-form heads-up or a structured info card with title and body.
- **Photo gallery / Embedded video** — visual storytelling for a destination.
- **Section header** — a divider to break long days into chunks.

ADVISOR TIP

Confirmation numbers go in every travel block. That single field is the whole reason itineraries exist for most travelers — it is the thing they will be asked for at the check-in counter, the front desk, and the cruise terminal. Fill it. The PDF and the public page both surface it prominently.

Multi-night stays only render once

When a hotel runs three nights, you do not need to add the hotel block three times. Add it once on the check-in day with its check-in and check-out dates. On the PDF and the public page the full hotel card renders on the check-in day; every subsequent day inside that stay shows a compact *"Continuing at [hotel name]"* badge. The same rule applies to multi-day cruise and tour-package blocks. Flights, activities, transfers,

meals, and rentals are always discrete — each occurrence renders as its own block. One source of truth for the confirmation number, no repeating hotel cards across a 14-day Europe trip.

Client additions — let travelers add their own stops

Itineraries are read-only to the client — but they can layer their own additions on top without touching what you built. From the public itinerary page, a signed-in portal account holder opens the **Add to your itinerary** modal from the action bar and submits a title, start time, optional end time, location, and notes. The item lands on whichever day matches the start date; if no day matches, it shows up under *Other additions* at the bottom. Every client-added item is badged "*Added by client*" with the contact name so neither side gets confused about who added what.

ADVISOR TIP

Agents can remove, not edit. Client additions show up in the agent builder under a *Client-added items* panel. You can delete an entry (use for obvious duplicates or typos), but the edit field is deliberately disabled — touching a client's wording silently breaks their mental model of "this is the thing I added." If it needs to change, ask them in a message.

Calendar subscribe — itinerary on their phone

Every shared itinerary has a calendar feed. From the public itinerary URL the client clicks the calendar icon in the action bar, opens **Add to your calendar**, and gets a private webcal:// URL they paste into Apple Calendar, Google Calendar, or Outlook. The feed updates automatically — change a flight time, their phone reflects the new time the next time their calendar app polls. The modal also offers a **Download snapshot .ics** button for clients who prefer a static copy, clearly labeled as a snapshot that will **not** update if the trip changes. Each flight, hotel check-in, cruise sail, transfer, activity, and meal becomes its own event, and client additions land in the same feed.

PDF export — for the airport

Every share link has a **Download as PDF** button in the top action bar (the download arrow icon). Click it and Trips generates a polished, paginated PDF on the fly: cover page with the trip name and dates, day-by-day spread, confirmation numbers, photos, and your agency branding in the header and footer of every page.

ADVISOR TIP

What the PDF is for. Even with calendar subscribe and the live URL, most clients still want a printable safety net for the trip folder, the carry-on, or the relative house-sitting their pets. The PDF is identical in content to the live page so there is nothing to keep in sync — you push the URL for live updates and they print the PDF for paper backup.

Troubleshooting

My hotel shows as "Continuing at..." on the day I expected the full card.

The full card renders on the **check-in** date. If the check-in date does not match the day card the block is sitting on, that day will look like a continuation. Open the hotel block and confirm the check-in date matches the day. Trips picks the chronologically-first day in the stay to render the full card.

I changed a flight time but the client says their calendar still shows the old time.

Calendar apps poll on their own schedule — Apple Calendar typically refreshes a subscription every few hours, Google every 24 hours. Time-sensitive changes (a same-day departure shift) are worth a direct message in addition to updating the block. The .ics snapshot download **never** updates — that is by design and the download UI labels it clearly. If a client is looking at a snapshot, send them the webcal URL instead.

The PDF takes a long time to generate or times out on a 20-day trip.

Generation is roughly proportional to day count and photo count. If you have dozens of high-resolution photos across a long itinerary, expect 10-30 seconds. If a PDF fails to render, the most common cause is a broken photo URL inside a photo gallery block — open the share page in a browser tab, look for any photo that fails to load, and re-upload it.

A client added an item to my itinerary and I do not want it there.

Open the itinerary in the builder. Scroll past the day stack to the *Client-added items* panel, find their entry, click **Remove**. The client is **not** notified — Trips treats removal as quiet moderation. If you want them to know it was removed, send a portal message explaining why.

Related

- [Proposals + Itineraries — what they are](#)
- [Proposal vs Itinerary vs Proposal Pro](#)
- [Building a proposal day-by-day](#)
- [Sharing + e-signing a proposal](#)