



TRIPS

# Customize your pipeline (Trip statuses)

Rename, recolor, reorder, and add custom trip statuses to match how your agency actually works — plus what core, default, final, and client-facing really mean.

Prepared by System Generated · June 10, 2026

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Trip statuses are the columns your trips move through — Draft, Inquiry, Quote Sent, In Progress, Completed, and so on. Every agency runs their pipeline a little differently, and Trips lets you reshape this list (TravelJoy calls them "Stages", Tern calls them "Trip States") without affecting any other agency.

#### ADVISOR TIP

**You can skip this entirely.** Trips ships with eight sensible defaults that work for most agencies on day one. Come back here when you notice your team using a status that doesn't exist yet, or when a default name doesn't match your vocabulary.

## Where it lives

Open **Settings** from the left sidebar, then click the **Trip statuses** card. You'll land on a single-page list at `/settings/pipeline` — every status for your agency in one place, in the order they'll appear in pickers across the app.

Every row shows a drag handle, a color swatch, the status name, any flags (DEFAULT, CORE, FINAL, INACTIVE), and an edit + archive button.

# The eight seeded defaults

When your agency was created, Trips seeded eight starter statuses. They're a working pipeline out of the box — sales-funnel stages on the front end, lifecycle stages on the back end:

## Sales funnel

- **Draft** — where every new trip lands by default.
- **Inquiry** — a client has asked but you haven't quoted yet.
- **Quote Requested** — you're preparing a quote.
- **Quote Sent** — quote is with the client.

## Lifecycle

- **This Week** — trip departs within 7 days.
- **In Progress** — trip is currently happening.
- **Completed** — trip is over.
- **Canceled** — trip won't happen.

The lifecycle four — **Draft**, **This Week**, **In Progress**, **Completed** — plus **Canceled** are the five system-protected ones (see the *Core statuses* section below). The three sales-funnel statuses between them (Inquiry / Quote Requested / Quote Sent) are convenience defaults — delete or replace them freely if your funnel uses different language.

## Add, edit, and reorder

Three things you'll do most often:

1. **Add a status.** Click **Add status** in the page header. A modal opens with name, color picker, behavior toggles, and a client-portal description. New statuses append to the end of the list — drag them where you want after saving.
2. **Edit a status.** Click the pencil icon on any row. The same modal opens, pre-filled. Save changes when done.
3. **Reorder.** Drag any row by its handle. The new order saves automatically the moment you drop — there's no separate Save button. This order is what shows up in the status picker on every trip.

### ADVISOR TIP

**Color is a free-form hex value, not a fixed palette.** The modal gives you a native color picker plus a hex input (`#6c757d`-style) right beside it. Pick whatever matches your brand — there's no curated swatch set to choose from.

# The four behavior flags

Every status carries four toggles that govern how the rest of Trips treats it. Three of these you'll set on most statuses; one you'll touch only when changing the trip-creation default.

## Default for new trips

Exactly one status per agency is the landing pad for new trips. Out of the box, that's Draft. To move it, edit a different status and tick this box — Trips silently un-defaults the previous one for you.

You can't un-default the current default by un-ticking the box; set another default first and the old one releases.

## Active

Inactive statuses still exist (and any historical trips parked on them keep their reference), but they disappear from the status picker on new and existing trips. Use this to retire a status without losing history — turn it off instead of archiving when trips might still be on it.

## Final / closed state

Trips on a final status are treated as closed. They drop out of "active pipeline" counts on the dashboard and in reports. Completed and Canceled ship as final; mark your own statuses final if they mean "this trip is done" (e.g. an agency-specific *"Lost to competitor"* state).

## Show in client portal

Client-facing statuses appear in the client portal's trip-progress tracker (the "pizza-tracker"-style stepper across the top of a trip). Internal-only statuses don't — clients skip right over them in the visual progress.

Internal-only statuses still appear in the agency status picker exactly like client-facing ones — the distinction only matters at the portal layer.

### ADVISOR TIP

**Use internal-only statuses freely.** Things like *"Waiting on supplier confirmation"* or *"Needs traveler form"* are perfect candidates — they're useful for your team, confusing for clients. Turn off **Show in client portal** on those and they're hidden from the portal stepper while remaining fully usable internally.

## Core statuses (and why some renames are locked)

Five of the seeded statuses are tagged CORE: Draft, This Week, In Progress, Completed, and Canceled. These are the ones the rest of Trips relies on by slug — the nightly auto-promote job, for example, walks active trips and bumps them from Draft → This Week → In Progress → Completed based on their dates, but only when they're sitting on a core status. (If you've moved a trip to a custom status like Quote Sent, Trips assumes you're driving the pipeline manually and leaves it alone.)

Because of that contract, core statuses are partially locked:

- **You can't rename a core status.** The Name field is read-only in the edit modal, with a "Core statuses have fixed names" hint.
- **You can't delete a core status.** The archive icon is greyed out with a tooltip explaining why.
- **You can change everything else.** Color, order, active/inactive, final, client-facing, and the client description are all editable — so you can still brand them to fit your visual identity.

#### ADVISOR TIP

**Don't mark Draft inactive.** It's technically allowed, but new trips land on the default status (Draft, unless you've moved the default elsewhere) — making your default inactive means new trips have nowhere obvious to live. If you want to skip Draft entirely, set a different status as default first.

## Archiving (deleting) a status

Click the trash icon on any non-core, non-default status and confirm. The confirm dialog warns you that *"Trips currently in this status will need to be moved."* The status is hidden from new pickers, but any past trips that used it keep showing the name on their cards — nothing breaks retroactively.

You can't archive a core status, and you can't archive the current default — set a different default first if you want to retire the one new trips land on.

## Client portal behavior

On the client portal trip page, the trip-progress tracker pulls every active, client-facing status for your agency, in order. Stages earlier than the trip's current status render as "done", the current one as active, later ones as upcoming. The optional client description you set on each status shows under the stage label — that's where "Your quote is ready for review" and "Welcome home! Your trip is complete." come from in the seeded defaults.

Canceled is a special case: it never appears in the stepper unless the trip itself is actually canceled. We don't end every happy trip with an ominous final "Canceled" stage.

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# Troubleshooting

## **I renamed a status and now a client sees a different label — is that supposed to happen?**

Yes — every client-facing surface (the portal trip tracker, status-change notifications) pulls live from the status row. Rename it and the new name shows up everywhere immediately, including on trips already sitting on that status.

## **I want to delete Inquiry and use my own funnel — is that safe?**

Yes. Inquiry, Quote Requested, and Quote Sent are non-core defaults, deletable like any custom status. Move any active trips off them first (Trips will warn you), then archive. The auto-promote cron doesn't touch custom statuses, so your replacements will behave the same way.

## **Why can't I un-check "Default for new trips" on my default status?**

Trips enforces that exactly one status is always the default — otherwise new trips would have nowhere to land. To move the default, edit a different status and tick the box on that one; Trips will silently release the old default in the same save.

## **Will Trips automatically move my trips between custom statuses (like Inquiry → Quote Sent)?**

No — only between the five core statuses, and only when start/end dates make the move unambiguous (departure within 7 days → This Week, currently happening → In Progress, end date past → Completed). Custom funnel stages stay under your control; the auto-promote job leaves them alone.

## Related

- [Trips — Getting Started](#)
- [What is a trip?](#)
- [The Trip page, top to bottom](#)
- [The branded client portal](#)