



TRIPS

Building a proposal: blocks, photos, pricing

How the proposal builder actually works in Trips — the block list, the photo uploader, the pricing card, and how autosave handles your edits as you type.

Prepared by System Generated · June 10, 2026

On this page

- [Opening the builder](#)
- [The block list](#)
 - [Content](#)
 - [Travel](#)
- [Working with photos](#)
- [The pricing block](#)
- [Preview vs share](#)
- [Saving and autosave](#)
- [Troubleshooting](#)
- [Related](#)

The Trips proposal builder is a side-by-side editor — an outline on the left, a live canvas on the right that looks like what your client will see. Everything is built out of typed blocks you stack into days.

Opening the builder

From any trip, click **+ Create** and pick Proposal, Proposal PRO, or Itinerary. Trips opens a blank draft — no days, no items, no pricing yet. You build from a blank canvas.

The top bar stays pinned as you scroll. The left side shows the title and a tiny **Saved** indicator that flashes after each edit syncs. The right side has a gear icon (document settings), **Preview**, and **Share**.

ADVISOR TIP

Trip dates already set? In the empty-state card click **Auto-add trip dates** to spawn one day per calendar date from the trip's start to end. Saves a minute of clicking **+ Add day** over and over.

The block list

Everything on the canvas is a block. Click **+ Add** inside the intro section, inside any day, or in the outro section, and the block picker opens. Blocks are grouped into two categories:

Content

- **Header** — a labeled section divider.
- **Narrative** — rich-text prose. The first narrative block in the intro becomes the hero subtitle.
- **Info** and **Note** — small callout-style blurbs.

Travel

- **Flight** — airline, flight number, from/to airports, times.
- **Lodging** — hotel name, address, room category.

- **Gallery** — multi-photo block when the images are the point.
- **Video** — paste a YouTube or Vimeo URL.
- **Cruise** — line, ship, cabin, embark/disembark ports.
- **Car rental, Rail, Transfer** — same shape, different category.
- **Tour package, Activity, Restaurant** — the on-the-ground stuff.

Click any item on the canvas (or in the outline) and an edit panel slides in with the fields for that block type. Edits save when you tab out — there is no Save button.

- **Drag a row** to reorder items inside a day, or across days to move between them.
- **Drag a day** (from the date chip) to reorder whole days. Day numbers renumber themselves.
- **Delete** — use the trash button inside the edit panel; days have one next to the day title.

Working with photos

Most block types accept photos — flights, hotels, activities, narratives, galleries, and so on. Section headers, videos, and the pricing card do not.

1. Click the block to open its edit panel.
2. Scroll to the **Photos** section and click **Add photos**. Pick one or many.
3. While each image uploads, the button shows *Uploading...* Thumbnails appear in a 3-column grid when it finishes; hover any thumbnail to remove it.

Each image can be up to 25MB and must be JPG, PNG, or HEIC. Uploads run through virus scanning and are encrypted at rest.

ADVISOR TIP

The cover photo lives in document settings, not on a block. Click the gear icon, open **Cover**, and upload there. Covers cap at 10MB.

The pricing block

Pricing lives in one card on every proposal (itineraries hide pricing, so the card is suppressed there). The Pricing tile sits near the bottom of the canvas — click it to open the pricing editor. There are three ways to enter pricing:

- **Total** — type the lump sum the client owes. Simplest, fine for most quotes.

- **Line items** — add rows with a label, quantity, and unit price. The total recomputes as you type.
- **Roll-up** — Trips sums the optional Price field across the blocks inside your days. Useful when you have already itemized everything and want one consistent total.

A deposit field sits next to the total. If you set one, the client view shows the deposit alongside the total — it does not collect (that is what Direct Invoices are for), it just communicates the split.

ADVISOR TIP

Currency is per-document. It defaults to USD on every new proposal. If you work in CAD/GBP/EUR, change it inside the pricing editor before sharing.

Preview vs share

Both buttons live in the top bar. **Preview** opens the live client-facing page in a new tab. **Share** opens a small modal with a copyable link.

Two surprises the first time you use Preview:

- Preview **mints a share link** the first time you click it, and it **flips the proposal's status from Draft to Sent**. Trips asks you to confirm before doing this.
- Any edit you make in the builder shows up on the client page on refresh — there is no separate publish step. To pull the link offline, use **Unpublish** on the Files tab.

Saving and autosave

There is no Save button anywhere in the builder. Every field saves when you tab out of it or after a short pause in typing. The **Saved** indicator next to the title flashes for about a second after each sync, and the canvas footer carries a persistent italic *Autosaved.* note for reassurance.

Drag reorders persist the moment you drop. Photos save when the upload completes. If your connection drops mid-edit, the indicator will not flash — refresh, see what stuck, and retype anything that did not.

Troubleshooting

I uploaded a photo and got an error.

Most often it is size — anything over 25MB is rejected. The next most common is format: only JPG, PNG, and HEIC go through. If the file is the right size and format, the virus scanner occasionally flags a corrupt supplier download; re-saving the image in Preview or Photos usually clears it.

I rearranged some items but the order keeps snapping back.

The drag never committed to the server — usually because the tab refreshed mid-drag. Try again and watch for the **Saved** flash next to the title; if you see it, a refresh will keep the new order.

My pricing total shows \$0 even though I added line items.

Each row needs both **Qty** and **Unit price** — a blank in either contributes 0. Roll-up mode has the same gotcha: it only sums blocks with a Price filled in inside their edit panel.

I hit Preview and now the proposal says Sent — did the client get an email?

No. Preview mints a shareable link so the URL can render publicly, and that link's existence flips the status. The client only gets notified if you actually share the link with them. To return the proposal to a private draft, open the trip's Files tab and click **Unpublish** on the proposal — the link goes dead immediately.

Related

- [Proposals overview](#)
- [Proposal vs Itinerary vs Proposal Pro](#)
- [Sharing and e-sign](#)
- [Itinerary deep dive](#)