



TRIPS

# Proposal vs Itinerary vs Proposal Pro

Three options appear when you click + Create on a trip — Proposal, Proposal PRO, and Itinerary. Same builder, three different documents. Here is how to pick the right one fast.

Prepared by System Generated · June 10, 2026

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Click + **Create** on any trip and you get three travel-document options: **Proposal**, **Proposal PRO**, and **Itinerary**. They all live in the same block-based builder — same day cards, same photo blocks, same hotel and flight items — but the document you create wears one of three faces on the client side. Pick the face that matches what you are doing at this moment in the trip's life.

#### ADVISOR TIP

**The fastest way to decide:** Has the client paid a deposit? If no → **Proposal** (or **PRO**). If yes → **Itinerary**. That covers ~95% of cases.

## The three-way comparison

### Proposal

Pre-booking sales document.  
Clean card layout, prints to PDF nicely.

- **When:** you are pitching the trip
- **Pricing:** shown
- **Accept button:** yes
- **Best for:** most clients
- **Badge:** *Classic*

### Proposal PRO

Same pre-booking use case as Proposal, dressed up. Full-bleed photography, scroll-driven reveals, cinematic hero.

- **When:** you are pitching the trip
- **Pricing:** shown
- **Accept button:** yes
- **Best for:** luxury, honeymoon, anniversary, big-ticket

### Itinerary

Post-booking reference document.  
The confirmed day-by-day plan the client travels with.

- **When:** the trip is booked
- **Pricing:** hidden
- **Accept button:** none
- **Best for:** every booked trip
- **Badge:** —

- **Badge:** *PRO*

## Proposal — your pitch

A **Proposal** is what you send before the client books. It is a sales tool. It shows photos, day-by-day plans, what is included, what is not, the price, and a **Accept this proposal** button at the bottom that signs the client up.

Layout is card-based and reads well in landscape and on mobile. The same proposal renders to a clean PDF the client can save or forward to a spouse for sign-off. The chooser modal labels this option **Classic** — that is the agent-facing label only; the client never sees the word "Classic" anywhere.

Pick Proposal when the trip is normal-budget, when the client is direct and price-driven, when they have asked for "something I can print," or when you are not sure which of the two proposal looks to use. It is the safe default.

## Proposal PRO — your pitch, dressed up

A **Proposal PRO** is the same kind of document as a Proposal — pre-booking, with pricing and an Accept button — but the client-facing presentation is magazine-style. Full-bleed cover photo, parallax hero, scroll-driven reveals on each day, animated price reveal at the bottom.

Use it when the trip earns the production: honeymoons, anniversaries, milestone birthdays, luxury cruise suites, private villas, multi-week safaris. Anything where a beautifully presented document is part of how you justify the price tag.

### ADVISOR TIP

**PRO is a look, not a different document.** Under the hood it is still a proposal. The pricing summary, Accept flow, share link, e-sign, and timeline all behave identically. PRO just renders the days with cinematic styling instead of cards.

## Itinerary — the booked plan

An **Itinerary** is the document you send *after* the trip is booked. It is the confirmed day-by-day plan the client travels with: flight times, hotel addresses and confirmation numbers, tour pickup windows, supplier contact info, day narratives. It is the document the client opens on their phone at the airport.

Itineraries do not show pricing, and they do not have an Accept button — the trip is already paid for or scheduled, so there is nothing for the client to agree to. The structure is otherwise identical to a Proposal: cover, intro, day cards with blocks, outro. You can attach a printable PDF and the client can subscribe to the trip dates as a calendar feed.

The agent-facing language in the builder also shifts: buttons say `Delete itinerary` (not `Delete proposal`), the share link says `Get the shareable link for this itinerary`, and so on. The builder knows what kind of document it is.

## How to pick — a summary

1. **Pre-booking, normal budget?** Proposal.
2. **Pre-booking, luxury or special-occasion?** Proposal PRO.
3. **Booked and paid?** Itinerary.
4. **Not sure?** Proposal. It is the safe default and you can switch to PRO from inside the builder if you change your mind.

### ADVISOR TIP

**Send a Proposal, then an Itinerary.** That is the normal trip lifecycle in Trips. The Proposal closes the sale; the Itinerary travels with the client. They are two separate documents on the same trip — both stay around as a record.

## Frequently asked

### **Can I switch a Proposal to Proposal PRO after I create it?**

Yes. Open the proposal in the builder and use the template switcher in the settings drawer. The same content keeps — just the presentation changes. The chooser modal even tells you this when you create one: *"You can switch between them later from inside the builder."*

### **Can I convert a Proposal into an Itinerary?**

You can change the template, but in practice agents rarely do — a Proposal is a sales document with pricing and an Accept button, and an Itinerary is a reference document without them. The cleaner workflow is to keep the Proposal as your accepted-sales record and create a fresh Itinerary on the same trip for the booked, confirmed plan. Both documents live on the trip and stay visible to the client side by side.

### **If a client accepts a Proposal, does it become an Itinerary automatically?**

No. Acceptance is its own moment — the proposal is stamped with the signer's name, IP, signature, and timestamp, and the lifecycle flips to **Accepted**. The proposal does not transform into something else. When you are ready to send the booked plan, create a new Itinerary on the same trip. That separation keeps the signed sales record clean and the day-of travel document focused.

### **Does the client see the word "Proposal PRO" anywhere?**

No. PRO is an agent-facing label that only appears in the chooser, in your builder, and in your internal listings. On the client side, both Proposal and Proposal PRO simply read as your trip proposal under your agency brand.

### **I started a Proposal but I should have picked Itinerary. Do I have to start over?**

You can switch the template from inside the builder, but the Proposal-shaped pieces you have built — pricing, an Accept setup — will be hidden on the client side once you switch to Itinerary. If you have not built much yet, the cleanest move is to delete the draft and create a fresh Itinerary so the defaults match what you actually want.

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## Related

- [Proposals — overview](#)
- [The proposal builder, step by step](#)

- Itinerary deep dive
- Sharing and e-sign

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