URTRAVELPRO

TRIPS

Proposals + Itineraries — what they are

Orientation to the proposal family in Trips — Proposal, Proposal PRO, and Itinerary. What each is for, how they share a builder, and how the share-and-sign flow works.

Prepared by System Generated · June 10, 2026

On this page

In Trips, the documents you send to win a booking and the ones you send after the booking all live on the same **proposals and itineraries** surface — the modern replacement for the PDFs, Word docs, and Travefy- or TravelJoy-style pages you have been sending until now.

> ADVISOR TIP
>
> **One builder, three faces.** Proposal, Proposal PRO, and Itinerary share the same day-by-day builder. The difference is what the client sees and whether the document asks for an e-signature. Switch between them inside the builder.

The three documents in plain English

Click **+ Create** on a trip and you get three choices in the chooser. Here is what each is for:

Proposal

The pre-booking pitch. Clean card layout, day-by-day plan, pricing, and an Accept button. Reads well on screen and prints cleanly to PDF.

Use this for most clients.

Proposal PRO

Same pre-booking job, dressed up. Full-bleed cinematic photography, scroll-driven reveals, an animated price reveal.

Use this for honeymoons, anniversaries, and big-ticket luxury.

Itinerary

Post-booking. The confirmed plan for a trip that is already paid. Same day-by-day layout, no pricing section, no Accept button.

Use this once the deposit lands.

ADVISOR TIP

Same builder, same blocks. Photo blocks, hotel cards, flight items, day cards, intro and outro text behave identically across the three. Learn one, you have learned them all.

The shared lifecycle

Every document — proposal or itinerary — moves through the same stages. Trips timestamps each one so you know exactly where the client is.

1. **Draft** — you are still building. Nothing is shared, the client has no link.
2. **Sent** — you have generated a share link (and usually emailed it). The client can now open the document.
3. **Viewed** — the client opened the link. Trips records the timestamp and a view count.
4. **Accepted** — the client clicked Accept and e-signed (proposals only). That version is frozen as the accepted version.
5. **Expired** — optional. If you set an expiry, the document goes read-only on that date.

Itineraries skip the Accepted step — there is nothing to e-sign on a confirmed plan.

How sharing works

You do not send a proposal as an attachment. Trips mints a public share link — something like `your-agency.urtravelpro.com/proposal/abc123` — and the client opens it in their browser. The page wears your agency's logo and brand color, with no UrTravelPro chrome.

From the document's page you can:

- **Copy the share link** to paste into email, SMS, or a portal message.
- **Send via email** using the built-in composer.
- **Open the client view** yourself to preview what the client sees.

IMPORTANT

The client never sees "Proposal" vs "Proposal PRO" vs "Itinerary." Those labels are agent-facing only. On the public link the client sees *"Your trip proposal"* or *"Your travel itinerary"* under your agency name. PRO is a presentation style, not a different product.

E-sign and what happens after Accept

On a proposal (Classic or PRO), the bottom of the page has an Accept section. The client types their name, signs, and clicks Accept. Trips records the typed name, the signature image, the email and IP address, the browser, the timestamp, and the exact version of the document they agreed to.

That accepted version is the document of record — even if you later edit the live proposal, the signed version stays exactly as the client saw it. From there the trip typically moves to your Booked status, and you swap the proposal for an itinerary.

Where to go next

Each linked guide below goes deep on one piece of the proposal flow.

Troubleshooting

I picked Proposal but my client is fancy — can I switch to PRO?
Yes. Flip the template toggle inside the builder and the same content re-renders in the cinematic layout. Day cards, photos, pricing, and intro text all carry over.

My client says the Accept button is missing.
You probably created an Itinerary instead of a Proposal. Itineraries are post-booking and have no Accept button by design. Switch the template from inside the builder if the trip is still pre-booking.

Does the client need a portal account to view a proposal?
No. The share link is public — anyone with the link can open it. The portal is separate.

Can I export the proposal as a PDF?
Yes. Use the **Download PDF** action on the document's page. Proposal PRO simplifies its cinematic effects for print.

Related

- Proposal vs Itinerary vs Proposal PRO — pick the right one
- The proposal builder, top to bottom
- Itineraries — deep dive

- Sharing and e-sign
