URTRAVELPRO

TRIPS

Sharing a proposal or itinerary

How the Share button works, how view tracking is recorded, and what happens when a client accepts a proposal.

Prepared by System Generated · June 10, 2026

On this page

Once a proposal or itinerary is built, the next step is putting it in front of your client. Trips uses a single **Share** button at the top of the builder for that.

The Share button + the public link

Open the builder. Top-right, next to **Preview**, is **Share**. Click it — Trips mints a public link the first time and reuses the same link every time after, so you never accumulate duplicate URLs.

The link looks like `https://your-agency.urtravelpro.com/proposal/<token>` by default. If you have a custom portal domain configured under **Settings** → **Custom domain**, Trips swaps in your branded host automatically. The token is a random handle and reveals nothing about the trip or client.

ADVISOR TIP

First share flips the status. A draft proposal becomes **Sent** the moment you open the share modal. Re-sharing never downgrades the lifecycle — status only moves forward.

Share-and-copy vs. emailing through Trip Messages

Share is a copy-link action — Trips does not send the proposal email for you. Two practical paths:

Just copy the link

Click **Share**, click **Copy**, paste into your usual email tool, a text message, or your CRM. Keeps your existing signature and template.

No email goes out from Trips. Status still flips to **Sent**.

Send through Trip Messages

Open the trip's **Messages** tab, paste the link into a new message. It goes out through your connected Gmail account (or the agency's default sender) and the thread stays attached to the trip.

Most agents prefer this — replies land back inside the trip.

ADVISOR TIP

Auto-portal invite on first share. If **Settings → Client portal → Auto-invite to portal** is on, the first share also emails the primary traveler a portal-claim link. Off by default.

View tracking

Every time someone opens the share URL (other than you previewing), three things happen:

- **The view count goes up by one.** Visible on the proposal card and in the Files tab.
- **Last viewed is stamped.** Shown as a relative timestamp — "Viewed 12 minutes ago".
- **Status flips draft → viewed exactly once.** After that it only changes on Accept (proposals) or stays at Sent (itineraries).

Agent previews are excluded. When you click **Preview** from inside the builder, Trips knows you are signed in to the same agency and skips the view-count bump.

E-sign on accept — proposals only

Proposals (Classic and PRO) end with an Accept block on the public page. Itineraries skip this entirely — they are informational, the booking is already in place by the time you send one.

The Accept block asks for the client's full name (which becomes their typed signature) and their email. On **Accept this proposal**, Trips captures the typed name as the signature of record alongside their IP, browser, and a timestamp. The exact version of the proposal they saw is frozen as the accepted version, so later edits never change the document they agreed to.

IMPORTANT

Typed name, not drawn. Trips v1 uses a typed-name signature — clients cannot draw with a finger or stylus. The typed name plus the IP, browser, timestamp, and frozen version is the legal record. Same model HelloSign and PandaDoc use for "type to sign" mode.

What happens when a client accepts

Three things fire in the same request:

- **Status flips to Accepted.** The public page reloads with a green "Accepted" banner showing who signed and when. A second click does nothing — Trips treats the first as the record.
- **Your team gets emailed.** The proposal author plus every owner and admin on the agency receive a "Proposal accepted" email. An in-app bell fires too.
- **The client sees a confirmation.** Same page, now showing the Accepted banner instead of the form.

ADVISOR TIP

The trip status does NOT auto-flip to Booked. "Booked" usually means deposit collected, and an Accept click is upstream of that. After Accept, move the trip status to **Booked** yourself and trigger your usual booking workflow.

Revoking a shared link

To pull a proposal back, open the trip's **Files** tab, find the proposal, and click **Unpublish**. The URL stops working immediately, status returns to **Draft**, and the old link returns a not-found page. Edit, re-share, and a fresh link is minted. Already-accepted proposals can be unpublished too — the acceptance record stays on the proposal regardless.

FAQ

Can I see exactly when the client opened the proposal?

Yes. The proposal card shows **Viewed <relative time>** once the first view comes in, plus a running view count. Each view is logged for inspection in the Files tab — useful when a client claims they never received it.

My client wants to sign with their finger, not type their name.

Not supported in v1. If a client insists on a drawn signature for a high-value booking, export the proposal as a PDF, run it through your existing e-sign tool, and upload the signed PDF to the trip's Files tab as the record.

I shared a link, then changed pricing. Did the client see the new price?

Yes — the share link renders the current version until the moment of Accept. After Accept, the version they signed is frozen and your edits no longer affect the document of record.

The status is stuck on "Sent" — the client says they opened it.

Likely an email previewer (Apple Mail Privacy Protection, corporate scanners) fetched the link instead of the client. Ask them to click into the link in a real browser and the status will flip.

Related

- Proposals + Itineraries — what they are
- Building a proposal in the builder
- Custom domain setup
- Trip Messages — talking to your client