URTRAVELPRO

TRIPS

The Trip page, top to bottom

A guided tour of the trip detail page: the hero, the eight tabs, the action pill, the "+ Create" menu, and the right-rail Trip details card. Where everything lives and how to interact with it.

Prepared by System Generated · June 10, 2026

On this page

The trip detail page is where most of your day happens. This article walks the page top-to-bottom so you know exactly what each piece is — and how to act on it without hunting.

The hero — cover, title, status, and meta

The big banner at the top is the trip hero. It has four things stacked over a cover photo, with a dark gradient overlay so the text stays readable on any image.

- **Title** — the trip's name (whatever you typed when you created it). Big, white, anchored to the bottom-left of the hero.
- **Status pill** — a white pill with a colored dot, showing the current trip status. Click it to open a quick-switch dropdown of every active status in your org. Picking a new one saves immediately; a tiny `Saving…` label flashes while it goes, and rolls back if the server says no.
- **Type chip** — if you set a trip type (Cruise, Tour, Honeymoon, etc.) it shows as a colored pill next to the status. The color comes from the type, not the status.
- **Meta row** — primary traveler's name, date range, traveler count, and destination count, each with an icon. Anything you haven't set is simply omitted; no placeholders.

> ADVISOR TIP
>
> **The cover photo is per-trip.** It overrides your agency default. If you haven't uploaded one for this trip, the agency default shows; if you haven't set an agency default either, you'll see the platform default. Upload from the action pill (next section) — PNG, JPG, or WEBP.

The action pill — Edit, Archive, Cover

Top-right of the hero sits a small white pill with three actions:

- **Edit** — jumps to the trip edit form, where you change name, dates, type, description, travelers, destinations, and internal notes.
- **Archive** — hides the trip from your active trips list. You'll get an in-app confirm before it commits; archived trips are restorable from the Archived view on `/trips`.
- **Upload cover** / **Replace** — opens a file picker. If a custom cover is already set, a small trash icon appears next to it for removing it (the agency default takes over).

On a phone the pill is hidden (it would clip the cover photo). A second row of the same actions appears in-flow just below the hero on narrow viewports — same behavior, different placement.

The "+ Create" menu

Bottom-right of the hero is a white **+ Create** button. It's the single launching point for everything you'd make on this trip:

What it makes

- **Create Email** — starts a new thread with the client. Switches you to the Messages tab and opens the composer.
- **Create Invoice** — opens the kind picker (Supplier vs Direct).
- **Send Form** — picks one of your published trip-attached forms and emails it to the client with a tracking link.
- **Create Proposal** — opens the Proposal / Proposal PRO chooser.
- **Create Itinerary** — finalized travel document for a booked trip; submits straight to the editor.

Where things land

Everything you create from this menu attaches to the trip. Proposals, itineraries, and invoices show up on the **Files** tab. Emails land in **Messages**. Form sends drop into **Form responses** the moment the client submits.

Most inner tabs duplicate the relevant + button locally — the Files tab has its own Proposal / Itinerary / Invoice creators, Notes has **Add note**, To-do has **Add task**. Use whichever is closer to where you're working.

The eight tabs — what's on each one

Under the hero is a tab strip. Each tab is a real link to `/trips/{id}/{tab}`, so bookmarks and browser-back work. The strip shows a badge next to a tab when there's a meaningful count.

- **Overview** — a 70/30 split. Left: **Trip information** (description, type, start/end date, internal notes) and an **Itinerary** preview if you have destinations. Right: the Travelers card and the Trip details card.
- **Messages** — the email thread with the client. Badge counts unread inbound replies; opening a thread marks them read.
- **Destinations** — a numbered Itinerary list of every leg with arrival/departure dates and notes. Edit jumps to the trip edit page.
- **To-do** — labeled **Tasks** inside, with assignees, due dates, reminders, and per-task automations. Badge counts open todos only.
- **Notes** — internal notes, optionally flagged Important. The author and timestamp show on every row.
- **Resources** — **Recommended resources**: Compass guides you've attached to this trip. They render in the client portal as cards that open the live Compass article — your edits flow through automatically.
- **Files** — three stacked sections: **Proposals & Itineraries**, **Invoices**, and **Files** (one-off uploads). Each section has its own **+** for adding to that bucket.
- **Form responses** — every form the client has submitted on this trip. Each row expands to show answers, signature image, and the IP/UA audit trail.

> ADVISOR TIP
>
> **Tab badges only show when meaningful.** Messages shows *unread* replies (rose), Form responses uses brand color, and the rest just count items. Zero never shows a badge — a clean strip means there's nothing waiting on you.

The travelers strip and portal invites

The Travelers card lives in the right rail of the Overview tab. Each traveler row shows avatar, name, a tiny **Primary** badge if applicable, email, phone, DOB, and role.

- Click the avatar or name to open the **contact drawer** for that person — same drawer you get from `/contacts`.
- Click any email, phone, or DOB value to copy it. A green checkmark flashes for ~1.5s when the copy succeeds.
- The portal row at the bottom tells you whether the traveler has a portal account: **Portal active** (emerald), **Invite pending** (amber), or no pill at all.
- The portal button next to the pill is contextual: **Invite to portal** if they've never been invited, **Resend invite** if the link is still pending, or **Send password reset** if their account is already active.

The right rail — Trip details card

Under the Travelers card in the Overview's right rail sits the **Trip details** card. It's the audit-y stuff that doesn't belong in the main info section:

- **Created** — the date this trip record was first saved.
- **Last activity** — relative time since something on this trip changed (a message, a status flip, a file upload). Reads "—" if nothing has happened beyond creation.
- **Trip ID** — the trip's short ID (the same 10-character string you see in the URL). Handy for sharing a direct link with a teammate.

Troubleshooting

I don't see the Edit / Archive pill at the top of my trip.
You're probably on a phone. The pill is hidden under `640px` wide to keep it from clipping the cover photo. The same actions appear in an in-flow row directly below the hero on narrow viewports — look right under the title block.

The status pill won't open / shows "Set status".
"Set status" appears when the trip has no status assigned yet — pick one from the dropdown and it'll start showing the name. If the pill won't open at all, the org has zero active statuses; head to **Settings → Trip statuses** and either un-archive one or add a new one.

My cover photo upload silently fails.
Three checks: (1) the file is PNG, JPG, or WEBP (HEIC and TIFF aren't accepted), (2) it's under your agency's upload size limit, and (3) you're not on a flaky network — the form auto-submits when you pick the file, so a dropped connection is invisible. Try again and watch for the success banner at the top.

I clicked a tab and it bounced me back to Overview.
The URL had a tab the page doesn't recognize — usually a stale bookmark from before a rename. Valid tabs are `overview`, `messages`, `destinations`, `todos`, `notes`, `resources`, `attachments` (Files), and `submissions` (Form responses). Anything else falls back to Overview.

Related

- Trips — Getting Started

- What is a trip?
- Trip files — proposals, invoices, and uploads
- Pipeline and statuses