



# PLOY

## PLANNER GUIDE

version 1.0

Hello there, welcome onboard!

We are thrilled to have you join PLOY's very special group of Local Planners. PLOY is a team of young, passionate talents with one goal, to provide the best and immersed travel experience to the world. Thus, we hope that our goals align and we try the hardest to plan every single trip as if it is for ours.

While we are working hard to get your first customer, please take a moment to read through this document, understand the process and agree to all the requirements to become a successful trip planner.

It is important for you to know that PLOY will not be able to run without you, and we sincerely believe that our planners are the company's most critical resource. If there are anything that we can do to enrich your experience here at PLOY, please don't hesitate to let us know. We are here to address any concerns or suggestions from you, so feel free to reach out at any time.

Your PLOY Planner  
Onboarding Team  
@ NYC  
2017

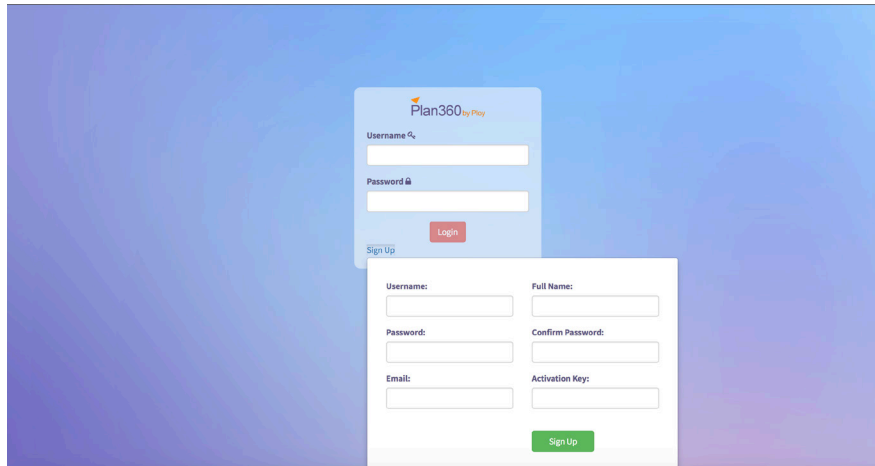


# Getting Started

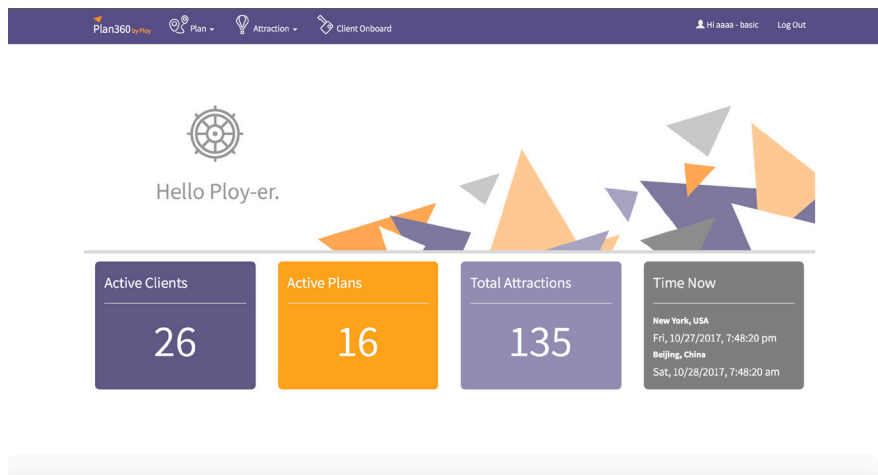


## Set up Plan360

1. Navigate to <https://plan360.ploytrip.com> and sign up using the activation key found in your Planner offer email.



2. Once signed up, log into your account to the home page of Plan360.



## Set up your PLOY marketplace

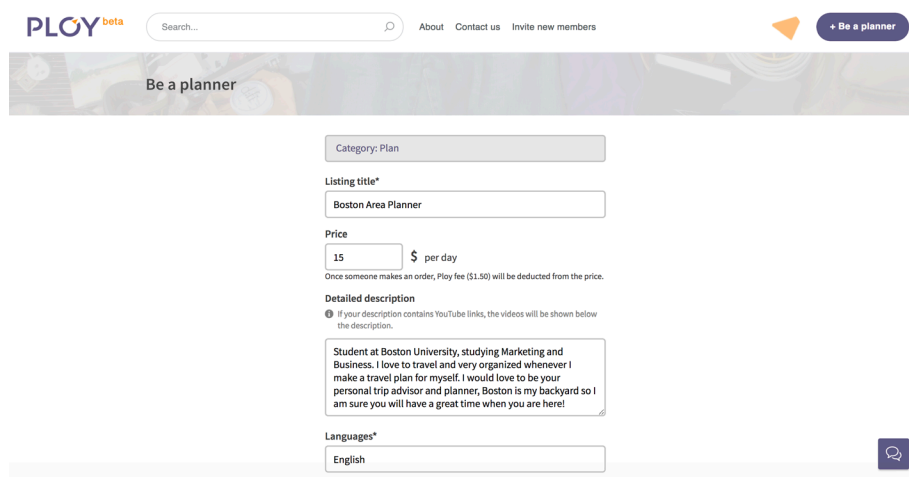
1. Navigate to <http://ploytrip.com> and log in using your account.
2. Go to Profile Image -> Settings -> Profile Info and update your phone number, profile picture, and about you.
3. Go to Payments and update your payment information, including bank account number and routing number. This is needed for you to receive orders and payments. Once payments is set up, you will be able to receive payments from customers 3-7 business days after they mark it as completed.

## Post your Planner listing

1. Click on 'Be a Planner' button, select 'Plan', and input all fields, including good quality photos of yourself, as well as any travel related images that you took. (No internet images allowed)

- Title should be a generic listing title, such as "New York City Planner", "West Coast Planner", "Vermont Planner w/ adventurous activities"
- Description should be as detailed as it can be. This should include a brief introduction of yourself, your hobbies, what you are good at, what you do during free time, your favorite places, etc.
- Price of the listing is decided by you, we recommend \$10 / day or less as a starting point and increase at a later stage. If you would like to plan it for as low, that is also acceptable.
- We recommend uploading at least 4 quality images to fully express yourself and your ability. JPG format is recommended.

*\*PLOY reserves the rights to remove any inappropriate listings and ask them to be edited.*



The screenshot shows the 'Be a planner' form on the PLOY website. The form is titled 'Be a planner' and includes a search bar, a 'Be a planner' button, and a 'Category: Plan' dropdown. The 'Listing title\*' field contains 'Boston Area Planner'. The 'Price' field shows '15' and '\$ per day'. Below the price, a note states: 'Once someone makes an order, Ploy fee (\$1.90) will be deducted from the price.' The 'Detailed description' field contains the text: 'Student at Boston University, studying Marketing and Business. I love to travel and very organized whenever I make a travel plan for myself. I would love to be your personal trip advisor and planner, Boston is my backyard so I am sure you will have a great time when you are here!'. The 'Languages\*' field shows 'English'. A 'Be a planner' button is located at the bottom right of the form.

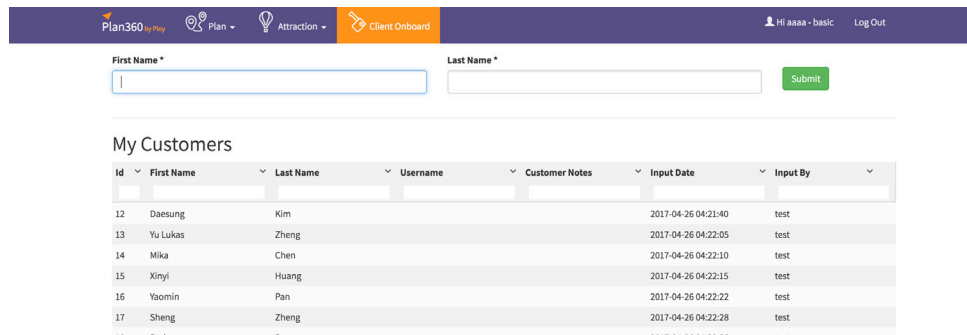
2. Hooray! You have just made a posting to be a planner. Now all you need to do is to wait for customers to contact you and make payments. Then you can start planning! (Note: PLOY does require initial quality draft to be delivered in 3 days and the entire transaction to be completed in 15 days.)

# Navigating around Plan360



## Step one - Onboard Customer

1. Click on “Client Onboard” and input customer First and Last Name, click ‘Submit’. The customer will be added to the ‘My Customers’ list.

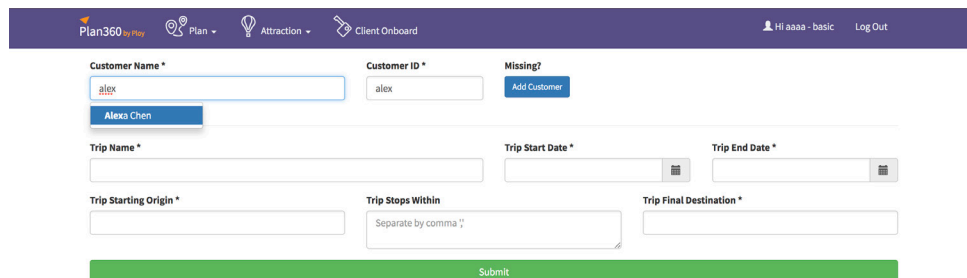


The screenshot shows the 'Client Onboard' form with fields for 'First Name' and 'Last Name', and a 'Submit' button. Below the form is a table titled 'My Customers' with the following data:

ID	First Name	Last Name	Username	Customer Notes	Input Date	Input By
12	Daesung	Kim			2017-04-26 04:21:40	test
13	Yu Lukas	Zheng			2017-04-26 04:22:05	test
14	Mika	Chen			2017-04-26 04:22:10	test
15	Xinyi	Huang			2017-04-26 04:22:15	test
16	Yaomin	Pan			2017-04-26 04:22:22	test
17	Sheng	Zheng			2017-04-26 04:22:28	test

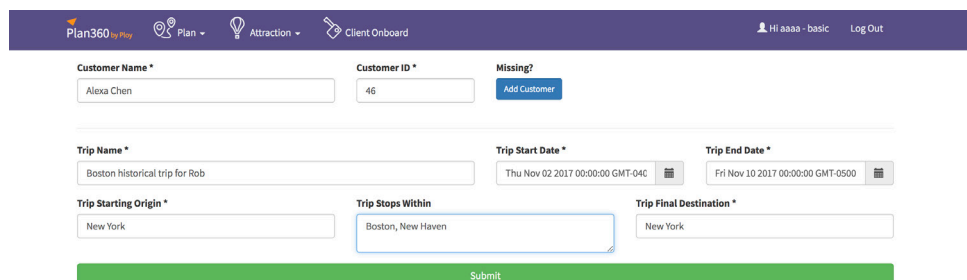
## Step two - Register a New Plan

1. Click on “Plan” -> “Input Plan” and input the customer name or id at the top section. A dropdown should appear with customer information.



The screenshot shows the 'Input Plan' form. The 'Customer Name' field contains 'alex' and a dropdown menu is open showing 'Alexa Chen'. The 'Customer ID' field contains 'alex'. The 'Missing?' button is labeled 'Add Customer'. Below these fields are sections for 'Trip Name', 'Trip Start Date', 'Trip End Date', 'Trip Starting Origin', 'Trip Stops Within', and 'Trip Final Destination'. The 'Submit' button is at the bottom.

2. Input all fields according to customer requirements. Plan name should be original and general. Then click Submit.



The screenshot shows the 'Input Plan' form with the following data entered:

- Customer Name:** Alexa Chen
- Customer ID:** 46
- Missing?:** Add Customer
- Trip Name:** Boston historical trip for Rob
- Trip Start Date:** Thu Nov 02 2017 00:00:00 GMT-04C
- Trip End Date:** Fri Nov 10 2017 00:00:00 GMT-0500
- Trip Starting Origin:** New York
- Trip Stops Within:** Boston, New Haven
- Trip Final Destination:** New York

The 'Submit' button is at the bottom.

## Step three - Apply/Create/Modify Destination Info Template

This step is needed to add destination information. Plan360 has a collection of templates that can be applied or modified to your plan. If no template is available, we recommend you to create a template.

(\*Please make sure the information you put in is accurate via a reliable source)

1. View/Modify template, click "Plan" -> "Destination Info Template".
2. Type in a destination/city that you would like to view, select the city and click "Load/Edit Template"
3. The content will be displayed into corresponding boxes, simply make changes and click "Update Plan" at the bottom of the page.

4. To Apply the template, click "Plan" -> "View Plans", type in the customer name or id, and choose from the dropdown.
5. Choose the plan from "Select Plan" dropdown and click "Get/Refresh Plan"



6. Click “Show Destination Info”, input the city name into the box and click import.
7. Verify all content is expected and click “Save Template to Plan”.
8. If any section needs modification, simple click on the section and make edits. Edits are saved automatically.

Plan360 by Ploy Plan Attraction Client Onboard Hi aaaa - basic Log Out

USA (Boston) Import Preview Save Template To Plan Data Updated...

Destination(s) Briefing

Boston Briefing ✓ ✕

Flight(s) Information  
no description

Accommodation(s) Information  
no description

What To Pack?  
test boston

## Step four - Insert Attractions to Plan

This step is essential for the daily breakdown of the plan, which is the core content of a well planned trip.

1. Click “Attraction” -> “View Attraction”, search Attraction by any criteria.
2. Choose the attraction you are looking for, verify all information and click “Add to Plan”. (You may choose to edit the attraction information if needed)
3. Select the customer and plan, and input all fields, click “Save”.

Plan360 by Ploy Plan Attraction Client Onboard Hi aaaa - basic Log Out

Search Any Search By Country Search By State new york Search By Name Search By Category

Hello - test Result count: 7

ID: 1000000026 Category: Tours and Activities  
Country: United States State: NY City: New York  
Last Updated: test @ 2017-08-08 00:14:23

**Name:** Flatiron Building  
**Address:** 175 5th Ave, New York, NY 10010  
**Phone:** 6466274015  
**Website:** <http://www.history.com/topics/flatiron-building>  
**Hours:** 24/7  
**Ticket Info:** Free  
**Parking Info:** Street Parking  
**Public Transportation:** Subway N,Q,R  
**Description:** The distinctive triangular shape of the Flatiron Building, designed by Chicago architect Daniel Burnham and built in 1902, allowed it to fill the wedge-shaped property located at the intersection of Fifth Avenue and Broadway. The building was intended to serve as offices for the George A. Fuller Company, a major Chicago contracting firm. At 22 stories and 307 feet, the Flatiron was never the city's tallest building, but always one of its most dramatic-looking, and its popularity with photographers and artists has made it an enduring symbol of New York for more than a century.  
**Notes:** No access indoor.

**ID:** 1000000027 Category: Tours and Activities  
Country: United States State: NY City: New York  
Last Updated: test @ 2017-08-08 00:14:28

**Name:** Times Square  
**Address:** Manhattan, New York, 10036  
**Phone:** 6466274015  
**Website:** <http://www.nycgo.com/attractions/times-square>  
**Hours:** 24/7  
**Ticket Info:** Free  
**Parking Info:** Street Parking  
**Public Transportation:** Subway services: 1 2 3 7 A C E N Q R W S trains at Times Square station  
**Description:**  
**Notes:**

**ID:** 1000000028 Category: Tours and Activities  
Country: United States State: NY City: New York  
Last Updated: test @ 2017-08-08 00:14:31

## Step five - Input New Attractions

If you are not able to find the attraction needed, this may be due to the attraction not present in the database. It is your obligation to input the new attraction into the system.

1. Click “Attraction” -> “Input Attraction”
2. Under “Attraction Name”, input the name of the attraction you would like to add. If the attraction is found in the dropdown, most of the fields will be autopopulated. If not, please input all fields manually.
3. Choose the “Category” and “Duration Suggested” of the attraction, fill in all missing fields such as “Details”.
4. Use google to look for two images of the attraction and paste the URL to the input boxes.
5. Update recommendation rating if needed and click “Save”
6. Repeat step 4 to insert the attraction to the plan.

Plan360 by Ploy
Plan
Attraction
Client Onboard
Hi aaaa - basic
Log Out

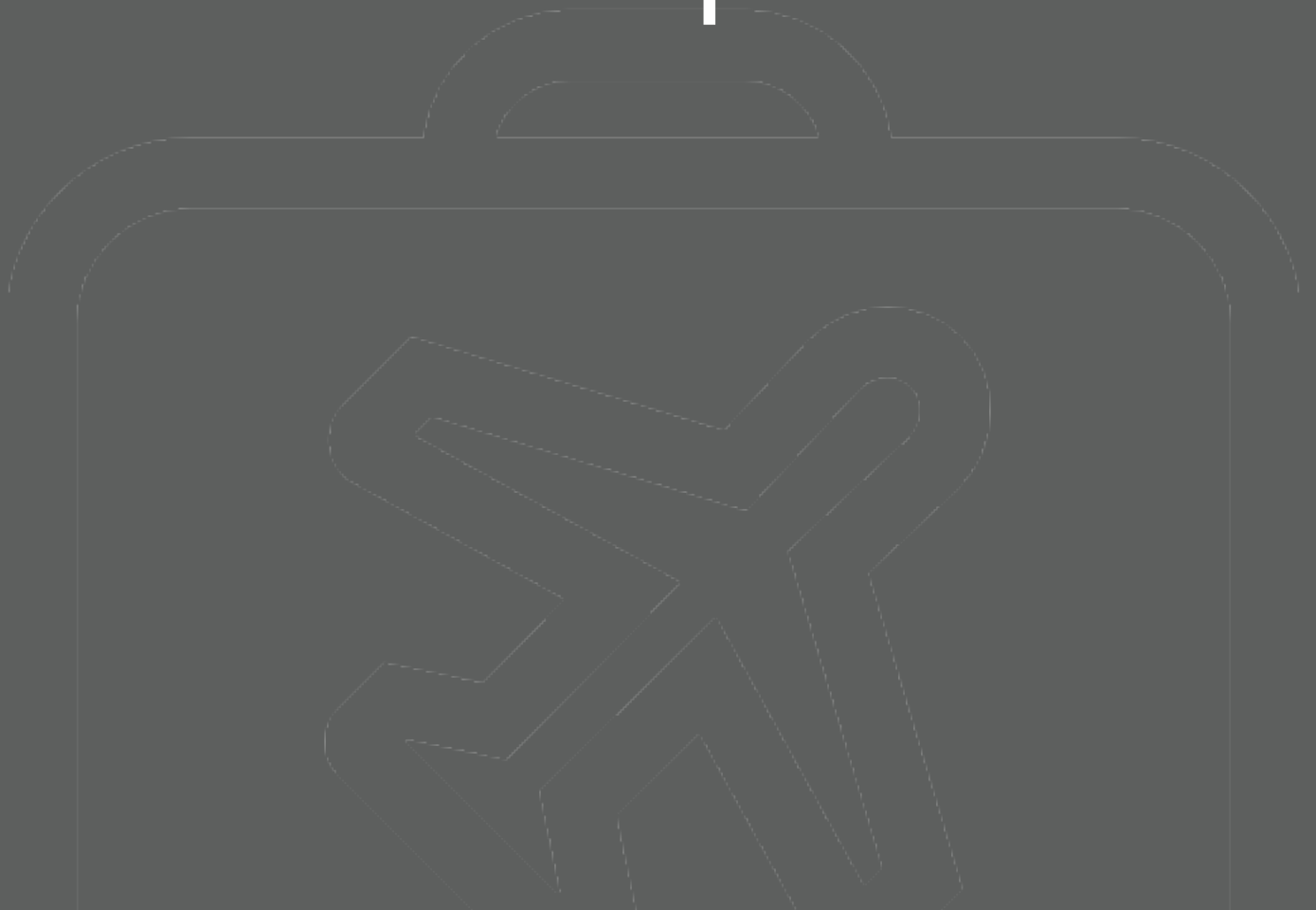
<b>Country</b> <input type="text" value="United States"/>	<b>State</b> <input type="text" value="MA"/>	<b>City</b> <input type="text" value="Boston"/>	<b>GPS Coordinates</b> <input type="text" value="42.3504997,-71.1053991"/>
<b>Attraction Name</b> <input type="text" value="Boston University"/>		<b>Category</b> <input type="text" value="Tours and Activities"/>	<b>Duration Suggested (Hours)</b> <input type="text" value="2"/>
<b>Address</b> <input type="text" value="Boston, MA 02215, USA"/>		<b>Phone</b> <input type="text" value="+1 617-353-2000"/>	<b>Website</b> <input type="text" value="http://www.bu.edu/"/>
<b>Ticket Info</b> <input type="text" value="N/a"/>	<b>Parking Info</b> <input type="text" value="N/a"/>	<b>Public Transportation Info</b> <input type="text" value="https://maps.google.com/?cid=3113234192467738312"/>	<b>Hours</b> <input type="text" value="24 hours"/>
<b>Details</b> <input type="text" value="Boston University is a private institution that was founded in 1839. It has a total undergraduate enrollment of 17,944, its setting is urban, and the campus size is 134 acres. It utilizes a semester-based academic calendar. Boston University's ranking in the 2018 edition of Best Colleges is National Universities, 37. Its tuition and fees are \$52,082 (2017-18). Boston University is one of the largest independent, nonprofit universities in the country. The BU Terriers have more than 20"/>		<b>Other Notes</b> <input type="text" value="Google PlaceID:ChJFzjIY_B544kRyL6j4ABuNCs"/>	
<b>Photo URL 1</b> <input type="text" value="http://www.bu.edu/creativewriting/files/2009/07/BU-CAS-"/>	<b>Photo URL 2</b> <input type="text" value="ia/commons/4/45/Boston_University_Medical_Center.jpg"/>	<b>Recommend</b> <input type="text" value="★★★★☆"/>	<b>Reservation Needed</b> <input type="checkbox"/>
<b>Inputted By</b> <input type="text" value="test"/>	<b>Cross-Checked By</b> <input type="text"/>		

# The Process

Below process shall be strictly followed:

1. Customer requests the plan and planner responds in 48 hours.
2. Planner uses Plan360 to produce & deliver the draft within 3 days.
3. Once the plan is produced, planner requests for the plan to be reviewed.  
(Plan -> View Plans -> Actions -> Request Review)
4. Plan set to be pending approval, which will be processed within 3 business days.
5. After approved, Planner downloads the plan as PDF.  
(Plan -> View Plans -> Actions -> View/Download PDF)
6. Planner attaches the PDF and sends email to the customer via Plan360.  
(Plan -> View Plans -> Actions -> Send Email)
7. Within 15 days of accepting the request. Planner makes edits until customer approves the plan. Payment is processed and deposited to Planner's bank account within 3-7 business days.
8. Customer and Planner review and rate each other.
9. Congrats and Done!

# Planner Business Principles



In order to maintain the integrity and PLOY community of Planners and to ensure that our mutual customers have consistently great experiences, Planners adhere to the following Business Principles. By doing so, we all achieve our goals.

As a planner, you should be able to uphold the following principles:

## Professionalism

You are a professional, whose primary concern is to provide your customers with unique travel experiences. To that end, you always act in a friendly, calm but professional manner. You understand that everything you say and do is a reflection of you, your country and your culture. You accept that you have total responsibility for your customer's happiness and safety. You believe that it is best to under promise and over deliver. In the event that a customer expresses dissatisfaction with their experience, you respond to the complaint in an appropriate manner - even if the complaint is groundless.

## Full Information

You believe in full and complete disclosure. All information in your profile and plans are accurate and up-to-date. You have a keen awareness of any hazards and clearly explain issues related to personal safety.

## Responsive

Questions regarding plan details or service are responded to as soon as possible, but no longer than within 24 hours. If you will be out of touch for a period of time, you've assigned a back up person to deal with any issues that arise.

## Reliable

Once a booking is confirmed, you will do your utmost to deliver the plan unless there is other exceptional circumstance. In this case, as soon as possible, you will inform the customer and PLOY so that we can work with you to find another qualified planner. In all cases, you are responsible for the successful delivery of the plan.

## Value for Money

The cost charged to customers will be as described in the listing description. You understand that the last thing a customer wants is to be surprised that things cost more than they expected.

## Knowledgeable

Your role is critical to the success of the plan. You are passionate and are well versed in the subject matter of your plan. You also are responsible to provide the most accurate information possible to your customers.

## Proactive

You are proactive and confirm and reconfirm all details of the plan. If possible, you contact the customer on the day or two prior to the tour. During the tour, you anticipate events and are aware of what's going on with the customer. You understand that you are responsible for the well-being of your customers.

## Flexible

You understand that your job very demanding and that things won't always run smoothly. When changes have to be made, you are clear to the customer why the change is being made. You do your best to make the customer happy at all times.



And thats a wrap, more features to come!

Happy planning!

For any questions or report an issue, please reach out to [contact@ploytrip.com](mailto:contact@ploytrip.com)  
or utilize our live chat support system on [www.ploytrip.com](http://www.ploytrip.com)

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