**Configuring Itinerary Templates in moonstride**

*Design, brand, and control every detail of the travel itineraries you send to your customers. moonstride’s HTML-based itinerary templates offer flexibility in structure, content, and visual presentation, ensuring each document meets your unique business needs.*

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**1. Introduction**

Itinerary templates in moonstride allow you to create visually engaging, branded, and information-rich travel documents for your customers. You have granular control over what each itinerary displays—down to the precise arrangement, pricing visibility, cover content, and even agent branding. All templates can be copied or repurposed, and sections can be hidden, sequenced, or removed as needed.

**2. Accessing and Viewing Itinerary Templates**

**Navigation:** Go to **Administrator > Settings > Itinerary Template**.

*Insert screenshot here (Screenshot 1) showing the main Itinerary Template listing page, menu navigation, and the Actions menu with Edit, Delete, Copy.*

* From this listing, you’ll see all templates, their type (e.g., Tour Itinerary, Mobile App Itinerary), code, name, and status (Active/Inactive).
* Use the **Search** area to filter templates by language, status, and document type.

*Insert screenshot here (Screenshot 5) showing the Search panel and status filters.*

**3. Managing Itinerary Templates**

**Search and Filter Templates**

Use filters at the top of the listing to quickly find templates by language, status (Active/Inactive/All), or document type.

*Screenshot 5 illustrates the Search section with language and status.*

**Editing a Template**

1. Click the **Actions** gear icon next to your chosen template, then select **Edit**.

*Insert screenshot here (Screenshot 1) highlighting Edit in the Actions menu.*

1. You will be directed to the template editing screen.

*Insert screenshot here (Screenshot 2) of the Itinerary Template Edit screen showing all header sections, field groupings, and configurable options.*

**Deleting a Template**

* In the same Actions menu, select **Delete** for the target template.
* Confirm the deletion when the warning message appears.

*Insert screenshot here (Screenshot 1 and/or 12) with Delete highlighted.*

**Copying a Template**

* In the Actions menu, select **Copy**.
* Enter a name for the new template when the pop-up appears and click **Save**.

*Insert screenshot here (Screenshot 13) showing the Copy Document Template pop-up.*

* Open the duplicated template to edit and customise as required.

**Changing Template Status (Activate/Deactivate)**

* Click on the **Status** link for a template to switch between Active and Inactive.
* Confirm in the warning popup.

*Insert screenshot here (Screenshots 1 and 14) showing the Status column with Active/Inactive.*

**4. Detailed Template Editing**

**Template Details and Branding**

Within the edit view, you can configure:

* **Name** – Enter the template name.
* **Code** – System-generated and unique.
* **Document Type** – E.g., Tour Itinerary.
* **Branding** – Choose Client, Agent, or Sell Channel Branding.
* **Mark as Default** – Make this your automatic selection for new docs.
* **Pricing Section** – Define exactly what pricing information appears (see next section for details).
* **Itinerary View** – Choose display style (e.g., small/big images).
* **Upload Itinerary Image** – Set a custom cover image.
* **Language** – Select the template language.

*Insert screenshot here (Screenshot 2) showing Name, Branding, Pricing, Image Upload, and Language fields.*

**Section Visibility, Content, and Order**

* Use checkboxes to display or hide core sections (e.g., Attachments, Location, Guide & Driver Contact Info, Summary, Passenger Info).
* Add or remove extra sections and reorder them using the **Sort Order** column.
* Use the "+" to add a new section and the "×" to delete.
* All section visibility adjustments can be done directly on the edit screen.

*Insert screenshot here (Screenshot 2 and Screenshot 4 for visibility, checkboxes, and section order).*

**Pricing Section & Previews**

* The **Pricing Section** dropdown provides options for how pricing appears:
  + Total Price Only
  + Service Names with Total Price
  + Service Only (no price) with Total Price
  + Service Name, Quantity & Total Price
  + Per Person breakdown, Per Person Type (Adult/Child/Infant), Pax Range
* Preview each pricing style by clicking the “i” icon beside the dropdown.

*Insert screenshot here (Screenshot 3) showing the Pricing Section dropdown with preview pop-up.*

**Adding Images and Branding**

* Upload a cover image for visually impactful itineraries (suggested size: 850px width x 450px height, jpg/gif/png/jpeg).
* Choose branding level—Client, Agent, or Sell Channel.

*Insert screenshot here (Screenshot 2 for Cover Image Upload area).*

**Header and Footer Options**

* Enable and edit the header using the rich text editor.
* Configure header to appear on the first page and/or all pages.
* Set the header height.
* Expand **Footer Options** to configure and customise footer content for the document.

*Insert screenshot here (Screenshot 4) showing header content editor and footer options.*

**Cover Page, Cover Letter, Contact Us**

Beneath headers and footers:

* **Cover Page** – Set introductory or welcoming text, images, or trip highlights to display up front.
* **Cover Letter** – Add a formal introduction, personal message, or travel overview.
* **Contact Us** – Include company contact details for customer queries or emergencies.

*Insert screenshot here (Screenshot 4) showing Cover Page, Cover Letter, and Contact Us fields.*

**Main Content Sections**

**You have fine control of these sections and can add, remove, sort, or edit their content as needed:**

* **Dates** Used to show travel start and end dates
* **Inclusions/Exclusions/Highlights** *Screenshot 6: Example of these sections with bullet points and ticks/crosses.*
* **Trip Summary** *Screenshot 7: Table view with dates, summary, service icons.*
* **Your Details at a Glance** *Screenshot 8: Detailed service-by-service breakdown—transport, tours, accommodation, etc.*
* **Itinerary Section –**Used to insert the day wise itinerary content and service wise details
* **Itinerary Section (Big Images)**– Used to insert the day wise itinerary content with big images
* **Service Sections** *Screenshot 9: Example with hotel details and images.*
* **Optional Upgrades / Enhancements** *Screenshot 10: Table layout for optional services per person type.*
* **Payment Plan/How to Book** *Screenshot 11: Payment plan summary with row-by-row amounts and statuses.* *Screenshot 12: How to Book instructions, key payment details, and custom notes.*
* **Documents** *Screenshot 13: Downloadable embedded documents, such as flight e-tickets or vouchers.*
* **Traveller Information** *Screenshot 14: Table listing all passengers with type and age.*
* Other content sections you may configure:
  + Additional Notes
  + Agent Commission
  + Price Details/Summary
  + Deposit Details
  + Balance Due Date
  + Payment Plan
  + Service Details
  + Location Information
  + Other Important Trip Information
  + Terms & Conditions
  + Traveller Information Section

*Insert each relevant screenshot to match the section it demonstrates.*

**Service Type Customisation**

* Select service-specific settings for Transfers or Vehicle Hire.

*Insert screenshot here (Screenshot 2, bottom, with transfer and vehicle hire selection drop-downs).*

**Available Tags**

* Use tags displayed above the body editor to dynamically insert booking or customer information (e.g., [#Company Name#], [#Lead Passenger#]).
* Only use tags from the list to ensure details are populated correctly.
* Do not alter the tag syntax.

*Screenshot 2 demonstrates available tags above the content editor.*

**5. See Also**

* [Document Branding and Logo Settings](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)
* [Booking & Enquiry Templates](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)
* [Managing Images and Media](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)
* [Translation and Multilingual Settings](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)
* [Task Assignment and Notifications](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)

**Summary**

With itinerary templates in moonstride, you build documents to your exact requirements—combining content flexibility (cover letter/page, trip summary, inclusions, and more), sophisticated section and pricing control, and professional branding. Screenshots at every step clarify the configuration process and help ensure optimal results for your organisation. If you need more help, our support team is always available.

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**Related Images**



































