**Manage Itinerary in moonstride**

*Transform service details into a customer-ready, interactive itinerary document. With moonstride, create, customise, share, and manage all aspects of your client’s trip itinerary—day-by-day, service-by-service, and fully branded to your business.*

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**1. Manage Itinerary Overview**

Once you add services to a quotation, you can build out the full itinerary. All selected products—flights, hotels, tours, transfers—are included and fully displayed in the itinerary document. You can edit, reorder, and add rich content to each section according to your brand and client needs.

**2. Summary**

Switch to the **Summary** tab for an at-a-glance list of all added services (flights, hotels, tours, etc.), including basic info such as dates, quantities, status (confirmed/not confirmed), locations, and other key details.

*Insert screenshot here of the Summary tab with services listed, three-dot action icon, and status indicators.*

On the right of each service row, the three-dot icon opens a menu for relevant actions (Edit, Copy, Notes, Supplier Ref. No., Delete, etc.), depending on the service type.

**3. Edit, Copy, Notes, Supplier Ref. No., Delete**

* **Edit:** Update service details directly; changes are reflected in the itinerary.
* **Copy:** Duplicate a service row to easily create a similar new service with minimal changes.
* **Notes:** Add or edit notes for each service (refer to the Notes section for details).
* **Supplier Ref. No.:** Add or update the supplier confirmation or reference code for tracking.
* **Delete:** Remove or cancel a service from the itinerary.

*Insert screenshot here displaying the action menu for a service, with Edit, Copy, Notes, Supplier Ref. No., and Delete.*

**4. Itinerary Tab**

The **Itinerary** tab displays a day-by-day breakdown of the journey, with each service allocated to specific days.

*Insert screenshot here of the Itinerary tab showing daily groupings.*

* To edit a day’s details, click the **pencil (edit) icon** next to the day or service.
  + *For day-level changes, you’ll be redirected to a day view customisation screen (screenshot here).*
  + *For service-specific edits, you’ll have access to a detailed service edit screen (screenshot here).*
* Use the **Edit All Days** button to batch edit descriptions, images, or visibility for multiple days at once.
  + *Insert screenshot here of Edit All Days screen and Save All button.*
* Choose whether each day/service appears in the itinerary using the Yes/No display toggle.
* Set **sort order** for services within a day by entering a number; save with “Save Sort Order” or revert to default order with “Remove Sort Order.”

**5. Viewing, Exporting, and Sharing Itinerary**

**View Itinerary**

Click **View Itinerary** to see the fully formatted itinerary in the browser.

*Insert screenshot here of the View Itinerary (browser display) document.*

**View PDF**

Use **View PDF** to generate a downloadable, shareable version of the itinerary.

*Insert screenshot here of the PDF version of the itinerary.*

**Share Itinerary**

Click **Share Itinerary** to open the sharing screen:

* Configure recipient, branding, and email content.
* Attach documents or include document links if required.
* Option to send the itinerary as client or sell channel branding, include payment links, and CC or BCC additional recipients.

*Insert screenshot here of the Share Itinerary interface and custom email template.*

**Edit Itinerary (Document Settings)**

Click **Edit Itinerary** to:

* Upload/change header image.
* Choose itinerary template and pricing format.
* Select branding, update the cover letter and description.
* Choose which information is displayed (images, highlights, service details, etc.).
* Option to use the same image in vouchers/invoices.

*Insert screenshot here of the Edit Itinerary settings screen.*

**6. Highlights/Includes & Excludes**

Add and manage *highlights*, *inclusions*, and *exclusions* for the package. Decide their order in the itinerary document and add multiple highlights as needed.

*Insert screenshot here of the Highlights / Includes & Excludes screen.*

**7. Service Allocation (Summary or Itinerary Tab)**

Click **Service Allocation** (top right in Summary view) to view or manage which services are allocated to which passengers, or vice versa.

* Use **Edit Allocation** to adjust passenger/service assignments.
* Select **Expanded View** to switch between views by passenger or by service.
* Sort services using the dropdown next to the Service Allocation button.

*Insert screenshot here of the Service Allocation management and expanded view.*

**8. Interactive Itinerary (Add-On)**

Take advantage of moonstride’s advanced interactive itinerary templates (PRO feature):

* Select Interactive Template from "Edit Itinerary".
* Interactive itineraries can be branded and customised for your needs and offer a dynamic navigation experience.

*Insert screenshot here of an Interactive Itinerary with tabs: Overview, Map, Trip Timeline, Summary At a Glance, Itinerary, Accommodation, Pricing, Terms, Contact Us.*

* Users and clients can navigate tabs for detailed trip info.
* Download as PDF is available with the "Download" button in the top right.

**9. Consolidated Itineraries with Currency-Specific Bookings**

Travel itineraries often span multiple countries and involve services in different currencies. In moonstride, such services are managed as separate bookings according to the required currency—but you can easily combine bookings or quotations to produce a consolidated itinerary.

**How it works:**

* Users can link multiple quotations or bookings with different currencies to generate a combined itinerary document.
* In the **Edit Itinerary** window, you’ll find options to:
  + Choose an itinerary template as usual
  + Add one or more “Secondary Booking(s)” for consolidation

[Insert screenshot here: Edit Itinerary screen with Template and Secondary Booking(s) highlighted, showing how to add bookings and custom titles]

* Enter/select the bookings or quotations you want to merge, assigning each a descriptive title (e.g., “Half-Day Sightseeing,” “Visit To Museum”).
* Save changes to generate a single, streamlined itinerary for the client.

**Key details:**

* The final document presents all services in chronological order, regardless of currency or original booking.
* Pricing sections are distinguished per currency, helping clients clearly understand their multi-country/package itinerary.

This feature is invaluable for agents organising complex travel across borders, delivering unified itineraries with currency clarity and a professional appearance.

**10. See Also**

* [Creating a New Quotation](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)
* [Manage Passengers](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)
* [Service Allocation and Pricing](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)
* [Document Branding Settings](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)

**Summary**

moonstride’s Manage Itinerary tools let you present tailored, accurate, and visually appealing itineraries to clients. Review, edit, share, or print day-wise or service-wise details and empower your team and passengers with a modern, interactive experience. Insert the referenced screenshots wherever indicated for best usability.