

Welcome to **travel**

Congratulations! You've just made a great step in improving your travel business. Our team of global correspondents personally investigates hotels and destinations so you don't have to! We'll show you how to access this information, and white label our content for your agency. Start planning insightful, world-class vacations with ease today! Check out our tutorial videos; www.travel-42.com/tutorials and participate in our free weekly webinars; www.travel-42.com/webinars to learn more about our product.

QUICK START GUIDE

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- [How to use Quick Email/Print](#)
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- [Starting a Trip and Creating an Itinerary](#)
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SETTING UP YOUR PROFILE — Business Card Tab

After logging in, click Edit Profile on the top right of the screen.



From here you can add information about yourself. Be sure your contact information and address are correct — this will appear on the cover page of your Trips.

To upload your logo and headshot the CANVAS and image size must exactly match the specs listed.

We will help you with this! Email: mhaberer@ntmlc.com

The screenshot shows the 'Business Card' profile editing page. It includes fields for personal and company information, a list of destination specialties, and upload buttons for a company logo and agent picture. The 'SAVE' button at the bottom right is circled in yellow.

Business Card
To change your User ID, Password, payment information, renew, or add users, click [Manage Account](#)

Include me in the Find an Agent Lead Generation Program: What is Find an Agent?

First Name: * Required
Last Name: * Required
E-Mail Address: * Required
Office Phone:
Mobile Phone:
Fax:
Website:
Company Name:
Company Address 1:
Company Address 2:
ShoreTrips Link Id:

Destination Specialties: (choose up to 3)

<input type="checkbox"/> Argentina	<input type="checkbox"/> England	<input type="checkbox"/> Italy	<input checked="" type="checkbox"/> Thailand	<input type="checkbox"/> Midwest U.S.
<input type="checkbox"/> Australia	<input type="checkbox"/> France	<input type="checkbox"/> Mexico	<input type="checkbox"/> Alaska U.S.	<input type="checkbox"/> Northeast U.S.
<input type="checkbox"/> Bermuda	<input type="checkbox"/> Germany	<input type="checkbox"/> Netherlands	<input type="checkbox"/> California U.S.	<input type="checkbox"/> Northwest U.S.
<input type="checkbox"/> Canada	<input checked="" type="checkbox"/> Greece	<input type="checkbox"/> Russia	<input type="checkbox"/> Florida U.S.	<input type="checkbox"/> Southeast U.S.
<input checked="" type="checkbox"/> Caribbean	<input type="checkbox"/> Ireland	<input type="checkbox"/> South Africa	<input type="checkbox"/> Hawaii U.S.	<input type="checkbox"/> Southwest U.S.
<input type="checkbox"/> China	<input type="checkbox"/> Israel	<input type="checkbox"/> Spain	<input type="checkbox"/> Las Vegas U.S.	<input type="checkbox"/> Washington, D.C.
<input type="checkbox"/> Czech Republic				

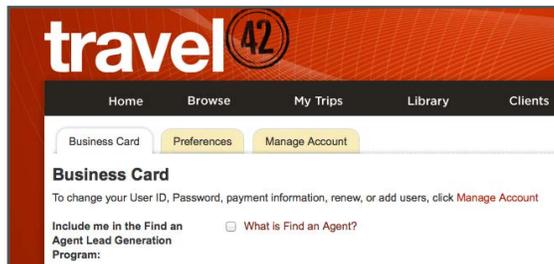
Company Logo: No file selected.
Images should be a maximum size of 230 x 80 pixels (width x height) and less than 100K in size.
 Delete the currently uploaded image

Agent Picture: No file selected.
Images should be a maximum size of 115 x 80 pixels (width x height) and less than 100K in size.
 Delete the currently uploaded image

****Be sure and hit **SAVE** before exiting the Business Card tab.**

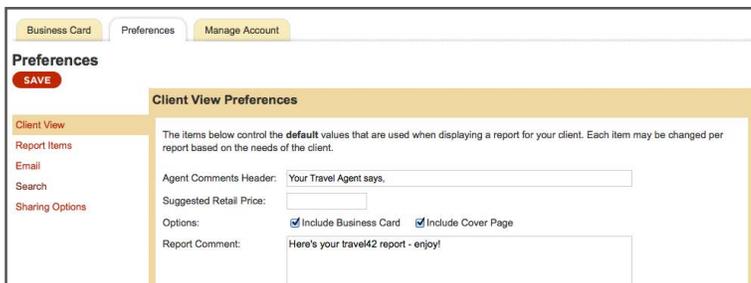
SETTING UP YOUR PROFILE — Preferences Tab

From this area you can also control the default settings within travel42 on the Preferences tab.



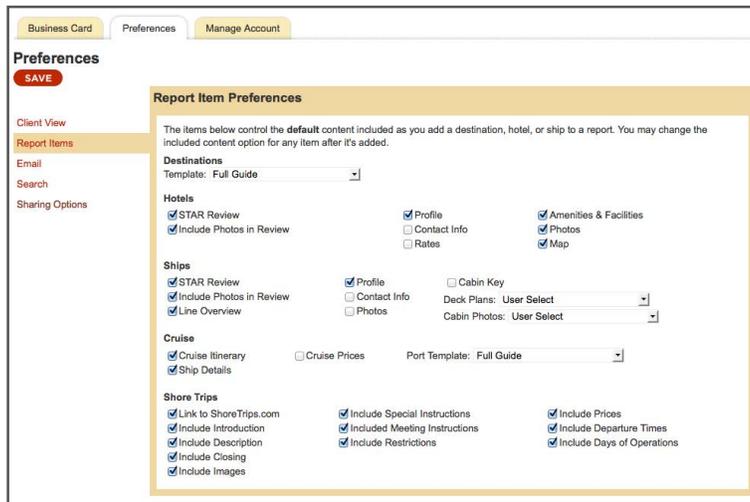
Client View

This will set up what your clients see on the Trip Plan Cover.



Report Items

This will change what is automatically included within the content of the report. Remove hotel pricing, contact info and more.



SETTING UP YOUR PROFILE — Preferences Tab

Email

This will set up the subject line, body message, and closing in the emails you send directly from travel42.

The screenshot shows the 'Email Preferences' section of the 'Preferences' tab. It includes a 'SAVE' button and a sidebar with options like 'Client View', 'Report Items', 'Email', 'Search', and 'Sharing Options'. The main content area is titled 'Email Preferences' and contains the following fields:

- Subject:** Michaela Haberer has sent you a travel42 report!
- Copy Me:**
- Personal Message:** I've prepared this report just for you. Please let me know if there's anything I can do to assist further.
- Closing:** Best
Closing is automatically followed by a comma, a line break, and then the agent's name.

Search

This will modify how search results appear within travel42. For instance, you can change the default setting to only show STAR-rated properties.

The screenshot shows the 'Search Preferences' section of the 'Preferences' tab. It includes a 'SAVE' button and a sidebar with options like 'Client View', 'Report Items', 'Email', 'Search', and 'Sharing Options'. The main content area is titled 'Search Preferences' and contains the following fields:

- Search For:** Destination Reports
- Sort Order:** STAR Rating
- View:** Details
- Show Only Hotels with STAR Reviews:**
- Sort Order:** Departure Date
- View:** Details
- Sort Order:** Name

Sharing Options

If you have a multi-agent account you can choose to share Trips or Library Items with other members on your travel42 account.

The screenshot shows the 'Sharing Preferences' section of the 'Preferences' tab. It includes a 'SAVE' button and a sidebar with options like 'Client View', 'Report Items', 'Email', 'Search', and 'Sharing Options'. The main content area is titled 'Sharing Preferences' and contains the following fields:

- Share Trips
- Share Library Items

****Be sure and hit **SAVE** before exiting the Preferences tab.**

SETTING UP YOUR PROFILE — Manage Account Tab

Manage Account for Single User Accounts

This tab is where you can update your user id, password and sign up for our eNewsletter.

Business Card Preferences **Manage Account**

Manage Account

My User Information

User ID and Password must be between 5 and 32 characters. Your Password must contain at least one digit and one alphabetic character. You can change your User ID and Password at anytime.

First Name:

Last Name:

Email Address:

User ID:

Password:

Retype Password:

Yes, please send me the travel42 newsletter to keep me up-to-date on travel news and product features

SAVE

If you have any questions or problems, please contact our Customer Care department at 855-872-8542 (in the US) or 336-714-3325 (outside the US) or email travel42@ntmlc.com.

Manage Account for Multi-User Accounts

If you are the Administrator for the account, this is where you can make changes to all levels of your account; change credit card information, look up monthly invoices, and add users.

Summary

This displays all account and subscription information. Click on the red words in each category to update or view more.

Business Card Preferences **Manage Account**

Manage Account

Account & Subscription Summary

Manage Account Summary	Account Profile travel42 demo account Account #: EPC00000049 Kelly McPherson kmcpherson@ntmlc.com 336-714-3328	Payment Method American Express *****1000 Auto Pay: No Manage	Plan Information COMPACT - Travel42 Annual Complimentary Next Renewal: Aug 14, 2015 Auto Renew: Yes See subscription terms & details
Account Administrator	200 Brookstown Ave Winston-Salem, North Carolina 27101 Update	Billing history Last Payment: \$45.26 See billing history	User Admin User Licenses: 1 Increase User Licenses
My User Information	User Information User ID: t42michaela Name: Michaela Haberer Password: ***** Email: michaela.haberer@gmail.com Update		

If you have any questions or problems, please contact our Customer Care department at 855-872-8542 (in the US) or 336-714-3325 (outside the US) or email travel42@ntmlc.com.

SETTING UP YOUR PROFILE — Manage Account Tab

Billing History

This displays all past invoiced and other payment details.

The screenshot shows the 'Manage Account' tab with the 'Billing History' sub-tab selected. The page is divided into sections for Invoices and Payments. The Invoices section contains a table with the following data:

Invoice Number	Invoice Date	Amount	Due Date	Balance
INV00001232	02/02/2011	(\$45.26)	02/02/2011	\$0.00
INV00001215	02/01/2011	\$45.26	02/01/2011	\$0.00

The Payments section contains a table with the following data:

Ref Id	Payment Date	Amount	Status	Type	Method
VSHA6BFBAC25	02/01/2011	\$45.26	Processed	Electronic	

Payment Method

This displays all information regarding your method of payment. You can enter a new payment method or update the existing credit card expiration date.

The screenshot shows the 'Manage Account' tab with the 'Manage Payment Method' sub-tab selected. The page displays the current payment method as 'AmericanExpress - Kelly C McPherson - *****1000'. There is a 'SELECT' button to change the method. Below, there is a section to 'Update an Existing Payment Method' with a dropdown menu for the card and a 'Month' and 'Year' selection for the expiration date. An 'UPDATE' button is at the bottom.

User Admin

This displays all user information. You can add a user by clicking on Create User. Delete a user by checking their name and clicking Delete. You can also invite new users via email.

The screenshot shows the 'Manage Account' tab with the 'Group User Administration' sub-tab selected. The page displays a table of users with the following data:

Email	User ID	Status	User Name	User Type
lisa@interfaceguru.com	interfaceguru	Active	Lisa Walsh (me)	Account Admin
<input type="checkbox"/> mhaberer@ntmlc.com	GuestEight	Active	Guest Eight	User
<input type="checkbox"/> mhaberer@ntmlc.com	GuestFive	Active	Guest Five	User
<input type="checkbox"/> mhaberer@ntmlc.com	GuestFour	Active	Guest Four	User
<input type="checkbox"/> mhaberer@ntmlc.com	GuestNine	Active	Guest Nine	User
<input type="checkbox"/> mhaberer@ntmlc.com	GuestOne	Active	Guest One	User
<input type="checkbox"/> mhaberer@ntmlc.com	GuestSeven	Active	Guest Seven	User
<input type="checkbox"/> mhaberer@ntmlc.com	GuestSix	Active	Guest Six	User
<input type="checkbox"/> mhaberer@ntmlc.com	GuestTen	Active	Guest Ten	User
<input type="checkbox"/> mhaberer@ntmlc.com	GuestThree	Active	Guest Three	User
<input type="checkbox"/> mhaberer@ntmlc.com	GuestTwo	Active	Guest Two	User

At the bottom, there are checkboxes for 'Delete Checked' and 'Send New License Invitations', and a 'CREATE USER >' button.

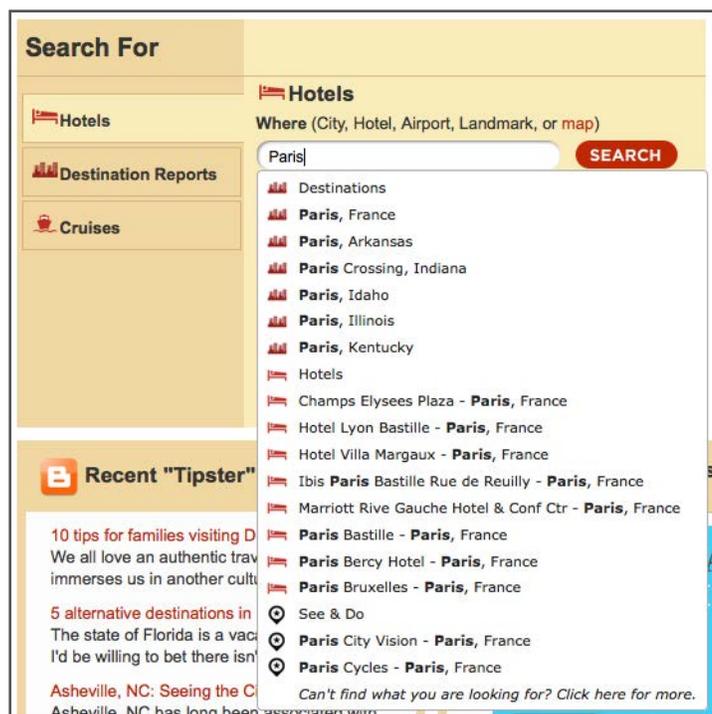
SEARCHING FOR ITEMS

From the logged-in Home Page you can search by **Hotel**, **Destination Reports**, or **Cruises**. You can also search by clicking on the map and browsing by region. The **Quick Search** in the top right corner is another popular search method.

Searching for a Hotel

With Hotels highlighted type in the city, specific hotel or landmark for which you would like to search near-by hotels and select it from the drop-down.

If you select Paris in the example to the right it will give you all hotels in Paris. If you select a particular hotel in Paris it will give you the full STAR report on that particular property. If you select a Point of Interest in Paris it will plot the hotels within closest proximity to that particular landmark.



SEARCHING FOR ITEMS

Searching for a Destination

With Destination Reports highlighted type in the name of the destination you would like to search for and select it from the drop-down.

The screenshot shows a search interface with a sidebar on the left containing three options: Hotels, Destination Reports (highlighted), and Cruises. The main area is titled "Search For" and "Destination Reports". It features a search input field with "Rome" entered, a "SEARCH" button, and a dropdown menu showing "Destinations" with "Rome, Italy" selected. Below the dropdown is a link: "Can't find what you are looking for? Click here for more." A world map is visible at the bottom right of the search area.

Searching for a Cruise

With Cruises highlighted you can search for a sailing by Destination, Line, Ship, Length, Date and Departure. You can also click Browse by Line and Ship to view cruise categories (like River) or lines (like Seabourn).

The screenshot shows a search interface with a sidebar on the left containing three options: Hotels, Destination Reports, and Cruises (highlighted). The main area is titled "Search For" and "Cruise". It features several dropdown menus for "Destination", "Line", "Ship", "Length", "Date", and "Departure", all set to "No Preference". A "SEARCH" button is located at the bottom right. Below the search area are two links: "Browse by Line & Ship »" and "Browse by Destination »".

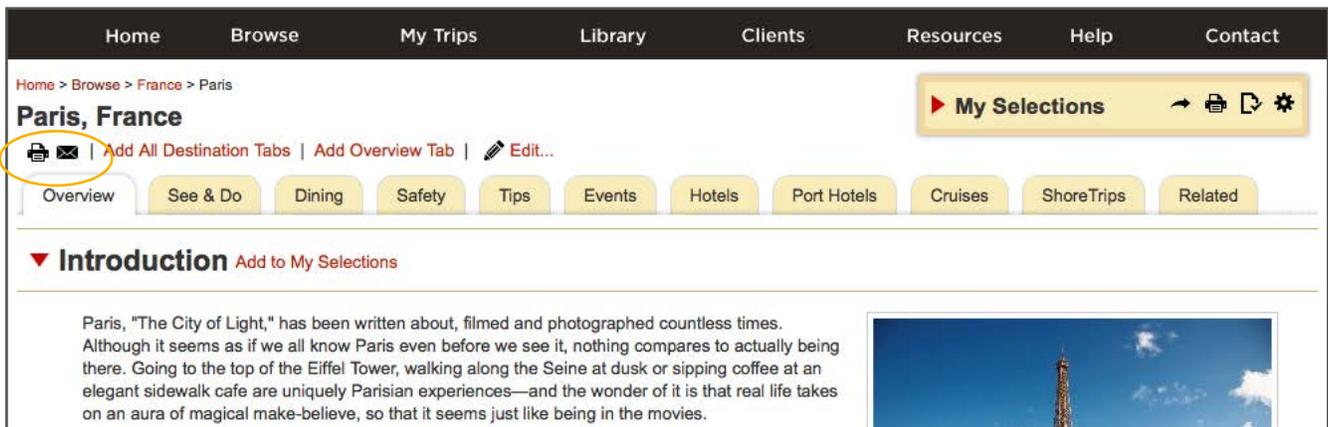
Searching using Quick Search

Quick Search is like a universal search. You can find Hotels, Destinations, Cruises and Points of Interest.

The screenshot shows the "travel 42" website's Quick Search interface. The top navigation bar includes "Home", "Browse", "My Trips", "Library", "Clients", and "Resources". The search input field contains "Rome". Below the search bar, there are sections for "My Recent Trips" and "Or Browse by Region". The "My Recent Trips" section lists various travel options like "25th Anniversary Trip", "Istanbul, Turkey", "Paris", "Danube River cruise", "Acapulco Hotel options", "Rome", "Cruise with AMA", and "River Cruise from Budapest". The "Or Browse by Region" section shows a world map. The bottom of the page features "Recent 'Tipster' Posts", "travel42 News & Updates", and "Travel A".

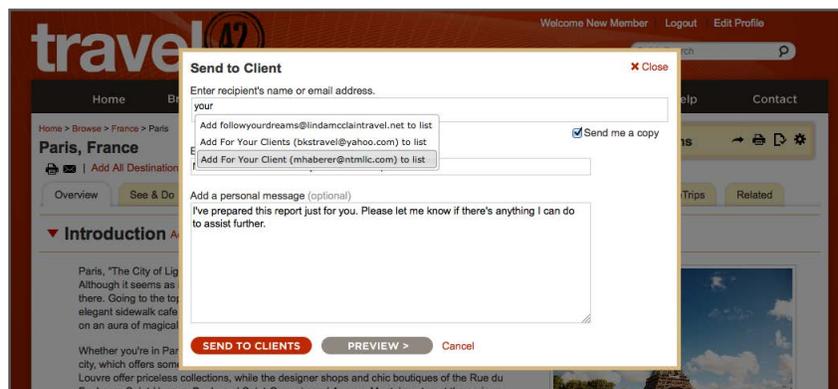
HOW TO USE QUICK EMAIL/QUICK PRINT

While looking at the correct hotel or destination, easily send the full review or destination guide to your client by utilizing Quick Email. You can also print the full review or report. A branded cover page will not appear when you send or print from this area.



 By clicking the printer icon, it will download the full guide as a PDF for you to then print. We define the full guide as the first six tabs within the destination guide. Everything from Overview to Events.

 Clicking the envelope icon will open a pop-up box. Here, enter your clients email address and select “add to list and clients”. You can enter a subject line and personal message, or modify the one you already have saved as the default from Edit Profile.



SENDING FROM MY SELECTIONS

To individually select content or to send a group of properties to a client you can opt to use the My Selections box without saving as a Trip. A branded cover page will not appear when you send or print from My Selections. After clearing My Selections your information will not be saved.

Add items into your My Selections box by clicking Add to My Selections next to any property name, destination information or cruise ship. The My Selections box, opened below by clicking on the red triangle next to My Selections, is currently empty.

The screenshot shows the 'Paris, France' page with a navigation bar and a 'My Selections' sidebar. The 'Introduction' section has a red triangle icon and the text 'Add to My Selections' circled in yellow. The sidebar is currently empty.

Home > Browse > France > Paris

Paris, France

✉ | Add All Destination Tabs | Add Overview Tab | ✎ Edit...

Overview See & Do Dining Safety Tips Events Hotels Port Hotels

▼ Introduction Add to My Selections

Paris, "The City of Light," has been written about, filmed and photographed countless times. Although it seems as if we all know Paris even before we see it, nothing compares to actually being there. Going to the top of the Eiffel Tower, walking along the Seine at dusk or sipping coffee at an elegant sidewalk cafe are uniquely Parisian experiences—and the wonder of it is that real life takes on an aura of magical make-believe, so that it seems just like being in the movies.

Whether you're in Paris for work or for fun, do as the Parisians do and enjoy yourself in this romantic city, which offers something special for everyone. For the art lover, the Musee d'Orsay and the Louvre offer priceless collections, while the designer shops and chic boutiques of the Rue du Faubourg Saint-Honore, Boulevard Saint-Germain and Avenue Montaigne tempt the serious shopper.

And for anyone who enjoys good food, Paris' restaurants, from inexpensive neighborhood bistros to

My Selections → 🖨️ 📄 ⚙️

🗑️ Clear 'My Selections'

- 🇫🇷 Hotels (0) 🗑️
- 🚢 Ships (0) 🗑️
- 🚢 Cruises (0) 🗑️
- 🚢 Shore Trips (0) 🗑️
- ✎ Paris (0) 🗑️

Find the items you want and add them here by clicking "Add to My Selections".

Once you build your list you can save it to your library for later, add it to a new or existing trip plan, or send it immediately to your client for review.

Additionally, you can use a pre-built destination report using one of our templates by clicking the Edit icon in the header above.

Click Add to My Selections to add it into the My Selections box. Anything added into the My Selections box will be sent to your client. You can remove the items you've added by clicking on the trash can in the Selections box, or by clicking Remove Item.

The screenshot shows the 'Paris, France' page with the 'Remove Item' button circled in yellow. The 'My Selections' sidebar now contains the 'Introduction' item.

Home > Browse > France > Paris

Paris, France

✉ | Add All Destination Tabs | Add Overview Tab | ✎ Edit...

Overview See & Do Dining Safety Tips Events Hotels Port Hotels

▼ Introduction Remove Item

Paris, "The City of Light," has been written about, filmed and photographed countless times. Although it seems as if we all know Paris even before we see it, nothing compares to actually being there. Going to the top of the Eiffel Tower, walking along the Seine at dusk or sipping coffee at an elegant sidewalk cafe are uniquely Parisian experiences—and the wonder of it is that real life takes on an aura of magical make-believe, so that it seems just like being in the movies.

Whether you're in Paris for work or for fun, do as the Parisians do and enjoy yourself in this romantic city, which offers something special for everyone. For the art lover, the Musee d'Orsay and the

My Selections → 🖨️ 📄 ⚙️

🗑️ Clear 'My Selections'

- 🇫🇷 Hotels (0) 🗑️
- 🚢 Ships (0) 🗑️
- 🚢 Cruises (0) 🗑️
- 🚢 Shore Trips (0) 🗑️
- ✎ Paris (1) 🗑️

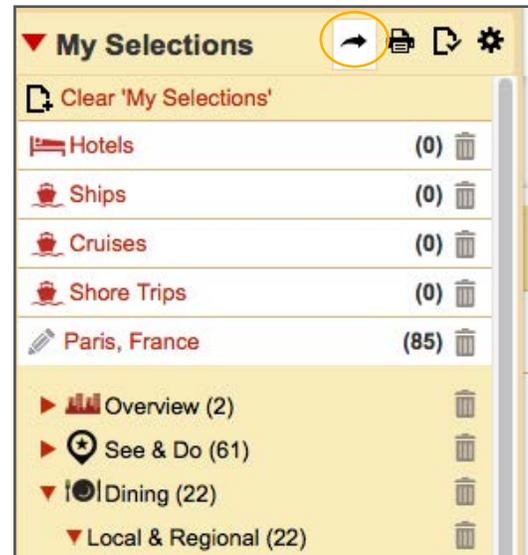
▼ Overview (1)

- Introduction 🗑️

SENDING FROM MY SELECTIONS

Once everything is added into the My Selections box, send to your client by clicking on the black arrow. It will open a pop-up box where you will enter your clients email address.

You can also Print the contents by clicking on the printer icon.



Clicking on the rectangle with a check mark saves this information as a Trip so your branded information appears and you can always pull it back up again.

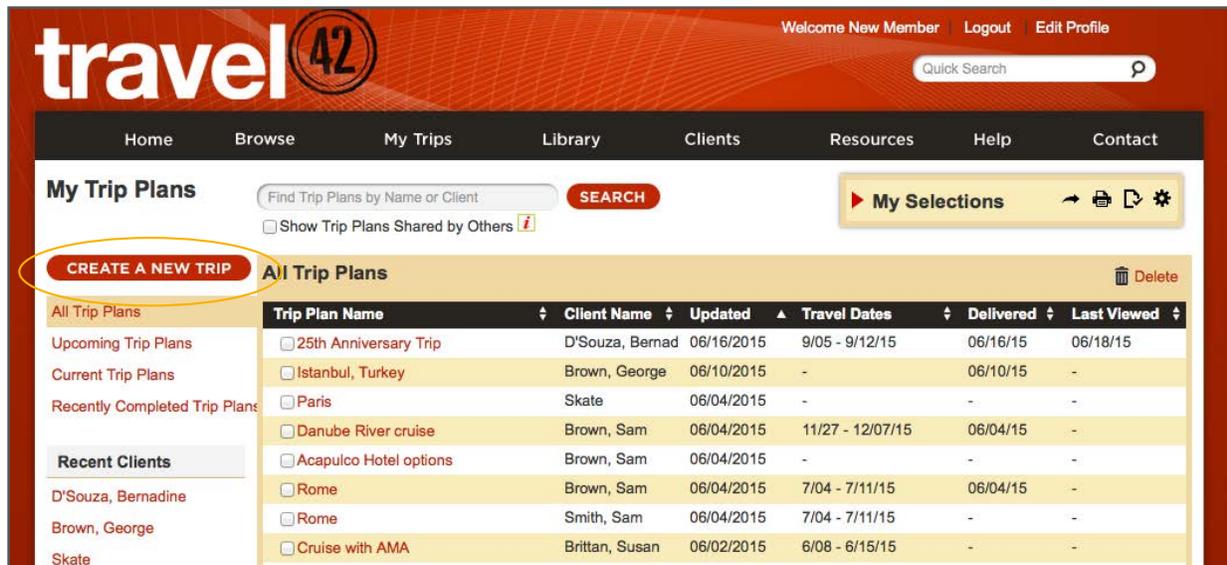


By hovering over the gear on the far right side you can Add the content into a Library Item, Download to your computer or clear and start new.



STARTING A TRIP AND CREATING AN ITINERARY

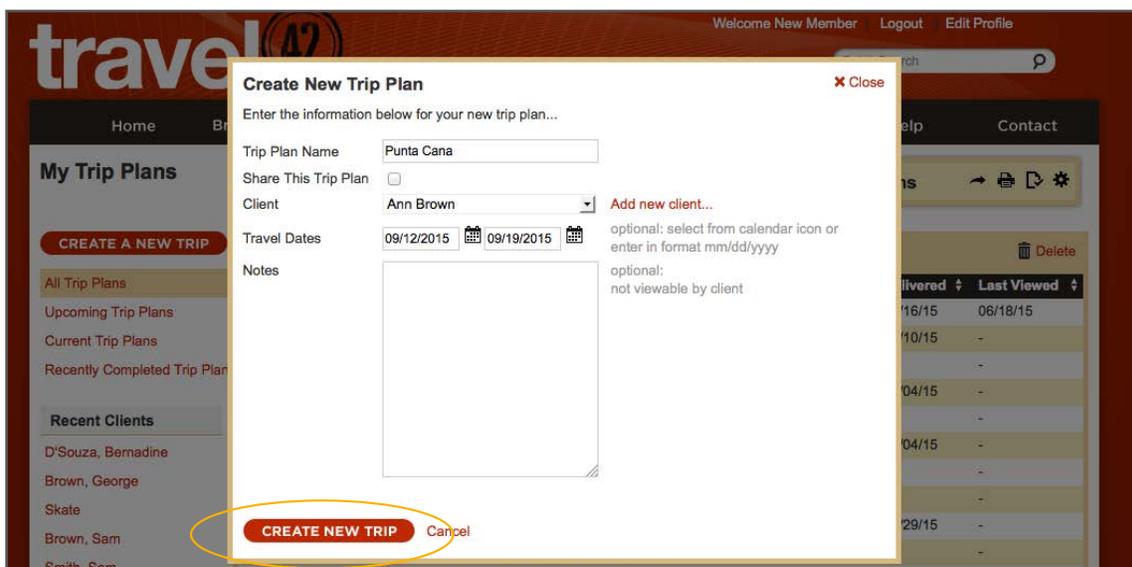
We recommend starting a trip by clicking on My Trips in the top black navigation bar. From here, select Create New Trip.



The screenshot shows the 'travel42' website interface. At the top, there is a navigation bar with 'Home', 'Browse', 'My Trips', 'Library', 'Clients', 'Resources', 'Help', and 'Contact'. Below this is a 'My Trip Plans' section with a search bar and a 'CREATE A NEW TRIP' button circled in orange. A table of trip plans is displayed below, with columns for Trip Plan Name, Client Name, Updated, Travel Dates, Delivered, and Last Viewed.

Trip Plan Name	Client Name	Updated	Travel Dates	Delivered	Last Viewed
<input type="checkbox"/> 25th Anniversary Trip	D'Souza, Bernad	06/16/2015	9/05 - 9/12/15	06/16/15	06/18/15
<input type="checkbox"/> Istanbul, Turkey	Brown, George	06/10/2015	-	06/10/15	-
<input type="checkbox"/> Paris	Skate	06/04/2015	-	-	-
<input type="checkbox"/> Danube River cruise	Brown, Sam	06/04/2015	11/27 - 12/07/15	06/04/15	-
<input type="checkbox"/> Acapulco Hotel options	Brown, Sam	06/04/2015	-	-	-
<input type="checkbox"/> Rome	Brown, Sam	06/04/2015	7/04 - 7/11/15	06/04/15	-
<input type="checkbox"/> Rome	Smith, Sam	06/04/2015	7/04 - 7/11/15	-	-
<input type="checkbox"/> Cruise with AMA	Brittan, Susan	06/02/2015	6/08 - 6/15/15	-	-

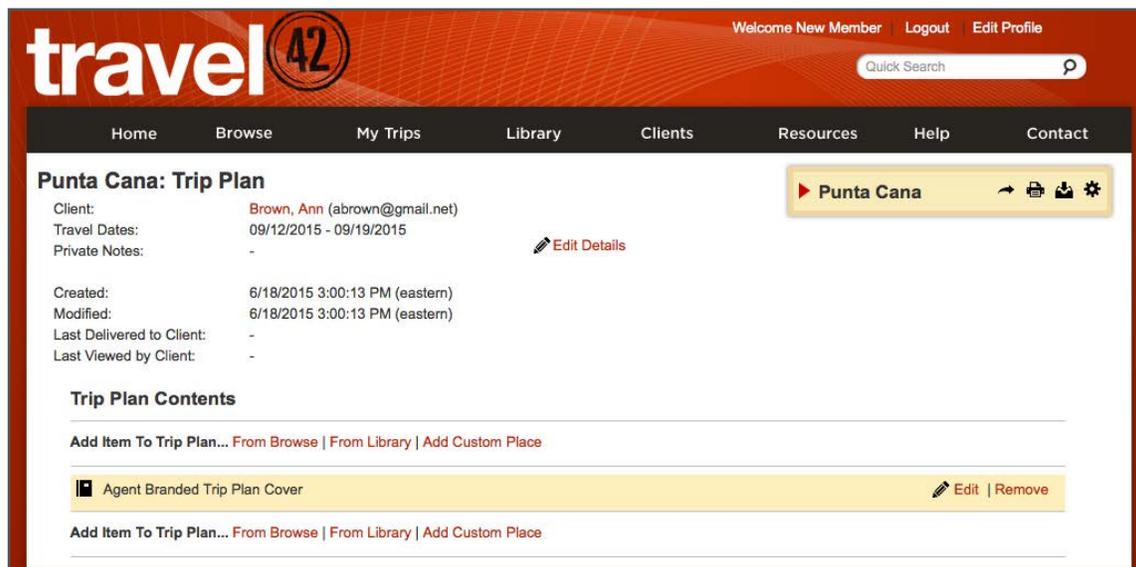
From here, a pop-up box appears where you are required to enter a Trip Plan name and select a Client from the drop down, or Add New Client. Dates and Notes are optional. Then click Create New Trip.



The screenshot shows the 'Create New Trip Plan' pop-up form. The form has a title bar with a close button. The main content area contains fields for Trip Plan Name (Punta Cana), Share This Trip Plan (checkbox), Client (Ann Brown), Travel Dates (09/12/2015 to 09/19/2015), and Notes. There are also instructions for adding a new client and optional date selection. At the bottom, there is a 'CREATE NEW TRIP' button circled in orange and a 'Cancel' button.

STARTING A TRIP AND CREATING AN ITINERARY

Now you are on the Customizable Trip Plan.



You can add content into your clients trip plan one of three ways.



From Browse will bring you back to home screen where you can type in your hotel, destination guide or cruise and click Add to Trip Plan to include into this trip.

From Library will take information you've saved from within your Library and allow you to add it into this Trip.

Add Custom Place will allow you to input information not included within travel42, like airline info and include in a Trip.

STARTING A TRIP AND CREATING AN ITINERARY

Once you've added everything into your clients Trip you can send, print, and download their Trip using the black icons (for more detailed information see Sending from My Selections).

The screenshot shows the travel42 website interface. At the top, there's a navigation bar with 'Home', 'Browse', 'My Trips', 'Library', 'Clients', 'Resources', 'Help', and 'Contact'. Below this, a breadcrumb trail reads 'Home > Browse > Dominican Republic > Punta Cana'. The main heading is 'Punta Cana, Dominican Republic'. There are buttons for 'Add All Destination Tabs', 'Add Overview Tab', and 'Edit...'. Below the heading, there are tabs for 'Overview', 'See & Do', 'Dining', 'Safety', 'Tips', 'Events', 'Hotels', and 'ShoreTrips'. The 'Introduction' tab is active, showing a paragraph of text about Punta Cana. On the right side, there's a sidebar menu for 'Punta Cana' with a gear icon. The sidebar lists categories like Hotels (1), Ships (0), Cruises (0), Shore Trips (0), and Punta Cana, Dominican Republic (22). Under 'Overview (2)', it lists 'Introduction', 'Highlights', 'See & Do (15)', 'Dining (3)', 'Tips (1)', and 'Events (1)'. Each item has a trash icon.

Hovering over the gear on the far right side shows additional Trip options.

This close-up shows the gear menu for the 'Punta Cana' trip. The menu items are: 'Customize', 'Create Trip Plan Itinerary', 'Add To Library', 'Start New', and 'Return to My Selections'. Below these are the same category listings as in the previous image: 'Punta Cana, Dominican Republic (22)', 'Overview (2)', 'Introduction', 'Highlights', 'See & Do (15)', 'Dining (3)', 'Tips (1)', and 'Events (1)'. Each item has a trash icon.

STARTING A TRIP AND CREATING AN ITINERARY

Clicking Customize will bring you back to the Customizable Trip Plan where the Trip was originally started. Here you can modify the Trip information, change the order of the information, edit the content, input special comments and more.

Punta Cana: Trip Plan



[Edit Cover Page Slideshow](#)

Client: **Brown, Ann** (abrown@gmail.net)
 Travel Dates: 09/12/2015 - 09/19/2015
 Private Notes: -
 Created: 6/18/2015 3:00:13 PM (eastern)
 Modified: 6/18/2015 3:00:13 PM (eastern)
 Last Delivered to Client: -
 Last Viewed by Client: -

Punta Cana [Share] [Print] [Download] [Settings]

- Edit Details
- Save Copy As
- Save to Library

- Send Trip Plan
- Download Trip Plan
- Print Trip Plan
- Preview Client Report
- Save to Word

Trip Plan Contents

[Add Item To Trip Plan...](#) [From Browse](#) | [From Library](#) | [Add Custom Place](#) **CREATE ITINERARY** **CHANGE ORDER**

- Agent Branded Trip Plan Cover [Edit](#) | [Remove](#)
- Punta Cana, Dominican Republic [Comments](#) | [Edit](#) | [Remove](#)
- [See & Do](#)

From here you can also create a day-by-day Itinerary for your clients. Drag and drop the unscheduled information from the left hand side added into your client's Trip to the correct day on the calendar. Click Back to Trip Plan when finished.

Punta Cana: Trip Plan Itinerary

To schedule a place, drag and drop any item onto a calendar day. You may then schedule multiple days by dragging the end of the calendar item. To remove an item from the calendar, click the scheduled item. Calendar items may be scheduled by hour by clicking the *week* or *day* button and dragging the item to the time slot.

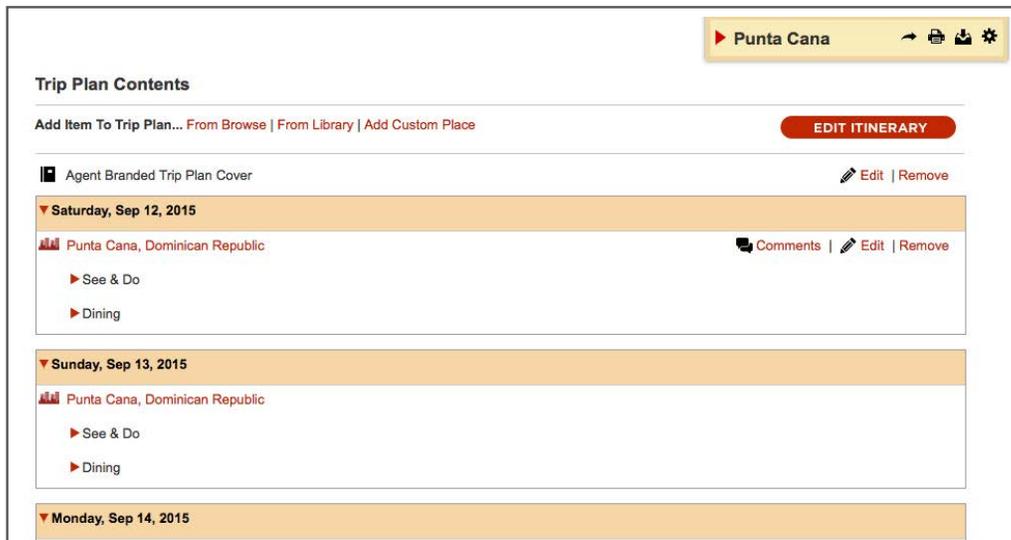
[Add Item To Trip Plan...](#) [From Browse](#) | [From Library](#) | [Add Custom Place](#) [Back to Trip Plan](#)

Travel Dates: 9/12/15 - 9/19/15 today **September 2015** month week day

Unscheduled	Sun	Mon	Tue	Wed	Thu	Fri	Sat
	30	31	1	2	3	4	5
Saturday, Sep 12, 2015							
Punta Cana, Dominican Republic							
▼ See & Do							
Barcelo Bavaro Casino, Bavaro, Dominican Republic							Punta Cana, Dominican Republic
Basilica de Higüey Nuestra Señora de la Altagracia, Higüey, Dominican Republic							
Casa Ponce de Leon, Punta Cana, Dominican Republic							
Dolphin Explorer, Punta Cana, Dominican Republic							
Dolphin Island Park, Bavaro, Dominican Republic							
	6	7	8	9	10	11	12
	13	14	15	16	17	18	19
Punta Cana, Dominican Republic							
			Altos de Chavon Regional Museum of Archaeology				

STARTING A TRIP AND CREATING AN ITINERARY

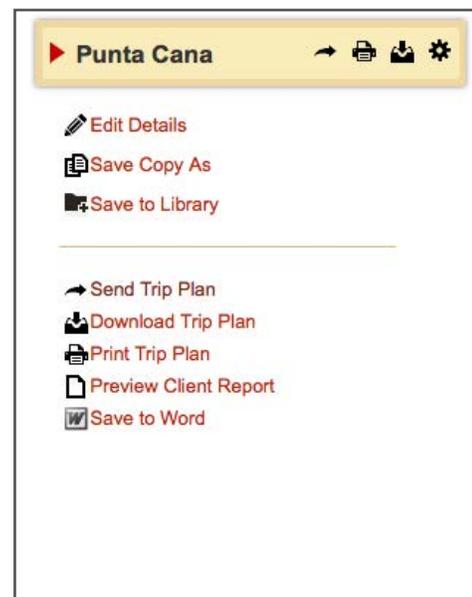
Now the Customizable Trip Plan contains a slightly different view with day-bay-day Itinerary.



To send your Trip or Itinerary over to your client click Send Trip Plan. The email pop up box will appear.

Once you send your Trip, hover over the gear and click Start New to clear out that trip and start back from the My Selections box. Your Trip will forever live in the My Trips area of travel42.

You can also Preview the Client Report and Save to Word.



USING THE LIBRARY

The Library is filing system where you can store your favorite trips to use over and over again for multiple clients. You cannot print or send directly from the Library. You have to create a new Trip and add your Library Items into the new Trip each time.

To move items you've saved into your Library into a Trip you will start by creating a new Trip as outlined in Starting a Trip. Instead of adding content from Browse, you will click the red words, From Library.

Paris: Trip Plan

Client: **Brown, Sam** (Sam.brown@gmail.net)

Travel Dates: -

Private Notes: - [Edit Details](#)

Created: 6/18/2015 3:34:40 PM (eastern)

Modified: 6/18/2015 3:34:40 PM (eastern)

Last Delivered to Client: -

Last Viewed by Client: -

Trip Plan Contents

Add Item To Trip Plan... [From Browse](#) | [From Library](#) | [Add Custom Place](#)

Agent Branded Trip Plan Cover [Edit](#) | [Remove](#)

This will open up all the Library Items you've stored. Click on the name of the trip you want to add into the new trip. NOTE: DO NOT put a check mark here, it will not add anything yet.

Library

Find Item by Name [SEARCH](#)

Show Library Items Shared by Others [f](#)

All Items [Move to](#) [Copy](#) [Delete](#)

Item Name	Updated
<input type="checkbox"/> Lisbon with cruise	01/09/2015
<input type="checkbox"/> Rome	01/09/2015
<input type="checkbox"/> Lisbon Cruise - Nov. 12	01/08/2015
<input type="checkbox"/> Paris trip from February 2015	12/30/2014
<input type="checkbox"/> Rome content from Sandy's trip	10/21/2014
<input type="checkbox"/> Paris	10/17/2014
<input type="checkbox"/> Bangkok 2	10/17/2014
<input type="checkbox"/> Cape Town	10/10/2014

USING THE LIBRARY

From here check the item you want to add into the new Trip. You can everything by clicking Check All, or check the portions you want.

Paris: Library Item [Edit Details](#)
[Save Copy As](#)

Private Notes: -
Created: 9/25/2013 12:45:39 PM (eastern)
Modified: 10/17/2014 2:10:55 PM (eastern)

Library Item Contents multiple items to **ADD**

Add Item To Library... [From Browse](#) | [From Library](#) | [Add Custom Place](#) **CHANGE ORDER**

- Check All
- Paris, France [Comments](#) | [Edit](#) | [Remove](#)
- Shangri-La Hotel, Paris, Paris, France [Comments](#) | [Edit](#) | [Remove](#)
- Boscolo Exedra Nice, Autograph Coll, Nice, France [Comments](#) | [Edit](#) | [Remove](#)

Add Item To Library... [From Browse](#) | [From Library](#) | [Add Custom Place](#) **CHANGE ORDER**

Now click on **ADD** multiple items to **ADD** to add everything you've checked into the new Trip.

Everything you checked from the Library trip is now in your active Trip plan box in the top right. You can now send, customize, or add to this Trip.

Paris: Library Item [Edit Details](#)
[Save Copy As](#)

Private Notes: -
Created: 9/25/2013 12:45:39 PM (eastern)
Modified: 10/17/2014 2:10:55 PM (eastern)

Library Item Contents

Add Item To Library... [From Browse](#) | [From Library](#) | [Add Custom Place](#)

- Check All
- Paris, France
- Shangri-La Hotel, Paris, Paris, France
- Boscolo Exedra Nice, Autograph Coll, Nice, France

Add Item To Library... [From Browse](#) | [From Library](#) | [Add Custom Place](#)

Paris

- Hotels (2) [Remove](#)
- Ships (0) [Remove](#)
- Cruises (0) [Remove](#)
- Shore Trips (0) [Remove](#)
- Paris, France (25) [Remove](#)