



PlanitEasy is a customer relationship management program designed specifically for travel advisors and offers a robust menu of features, including itinerary building, pricing, proposal technology and trip management. As a cloud-based and API-driven platform, PlanitEasy improves advisors' efficiency by connecting with other travel-related services, eliminating the need to switch between different websites and applications.

KEY FEATURES

CRM

- Organized client and profile database (preferred GTC suppliers, mass upload clients from other CRMs)
- Email integration (templates, automated communication)
- Task management (Trip Workflow, Task Creation, Trip Checklists)
- Auto-sync forms (Client Information, Trip Request)

Trip Planner

- PlanitEasy Supplier Database
- Google search engine and Maps integration
- Sophisticated, mobile-friendly itineraries and proposals

Accounting

- Customized invoicing options
- Credit card authorization forms stored in secure PCI-compliant environment

Sabre Integration

- Two-way client profile sync between Sabre and PlanitEasy
- Import PNRs directly into trips

GETTING STARTED

The initial launch includes Sabre Integration, Sub-Branding Options, Mobile App, Onboarding Assistance and all future GTC technology integrations. Follow these steps to begin revolutionizing your business with PlanitEasy:

1. Register for an upcoming advisor webinar to determine if PlanitEasy is a good fit for your business needs.
2. Provide onboarding materials and schedule GTC Onboarding sessions.
3. Start a free trial with onboarding session, tour and demo.

COMING SOON

The GTC and PlanitEasy teams will continue to collaborate and build out new integrations and enhancements to elevate the advisor experience.

- APEX financial integration
- Advisor Portal integration
- Reporting enhancements