

GoGuide Workflow: Instant Bookings

When a Trip is Booked Instantly

-  **Automatically reserved** on calendar
-  Trip is either:
 - **Fully paid**, or
 - **Down payment collected**

Step 1: Check the Booking Card

- Review **trip details**
- See **payment status**
- View or update **customer contact info**
- Add more customers if needed

 **Tip:** Think of the booking card as your trip command center!

Step 2: Assign a Guide

- Assign **right away** or
- Wait until **closer to trip date**

 **Heads Up:** If you wait, don't forget to circle back before the trip!

Step 3: Make Adjustments via Reschedule Flow

Use this for:

- Guide changes
- Asset assignments (e.g., **boats, river sections**)
- Date/time shifts

 **Pro Tip:** Even guide swaps go through *Reschedule*. It's the GoGuide way—simple and clean.

 **Encouraging Note:** Reschedule flow updates everything you need in one place and keeps reporting accurate!

 **Heads Up:** Want to make quiet edits?

 Use the “**Don’t notify**” trick: Deselect email on final page of rescheduling + press Confirm to skip sending updates to the customer.

Step 4: Handle Payments

- If only a **down payment** is collected:
 - Use **Collect Payment** to charge the rest:
 - ☐ Charge card on file
 - ☐ Send invoice
 - ☐ Enter new card info
- Prefer offline collection?
 - Use **Collect External Payment** to log it.

 **Tip:** This keeps your reporting tidy and full of sunshine!

Bonus Tips:

- Encourage team members to review trips early for **general ops awareness**.