


GoGuide Workflow: Requestable Bookings

Help your team turn trip requests into paid, scheduled adventures with ease! This workflow covers every step from receiving a request to collecting payments, assigning guides, and making updates like a pro 🚀

When a Trip is Requested

- The trip request appears in the **Requests tab**
- A **card is on file**, but **availability is NOT automatically reserved**

 **Tip:** Requestable trips are still pending—nothing is confirmed yet!

Step 1: Approve or Deny the Request

- Click into the trip from the **Requests tab**
- On the right-hand side, select:
 - **Accept** → Reserves the availability (but *does not* charge the card)
 - **Deny** → Declines the request, no changes made

 **Heads Up:** Accepting = a green light, but **you still need to charge the customer manually.**


Step 2: Collect Payment

Once the request is accepted:

- Go to the booking card and click **Collect Payment** to:
 - Charge the **card on file**
 - **Send an invoice**
 - Manually enter **credit card info**


Prefer to collect outside of GoGuide?

- Click **Collect External Payment** to log it and keep reporting clean

 **Pro Tip:** Recording payments keeps your data sharp and saves headaches later.


Step 3: Review the Booking Card

- Confirm key trip details and notes
- View/edit **customer contact info**
- Add more **customers** if needed

 **Tip:** Think of the booking card as your trip's dashboard. It keeps everything in one place!

Step 4: Assign a Guide


- You can assign a guide right after accepting the request **or** closer to the trip date—it's up to you


 **Heads Up:** Unassigned trips are still active! Don't forget to loop back.


Step 5: Make Adjustments via Reschedule Flow


Use this for:

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

 **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.

Bonus Tip

- Encourage team members to check incoming requests and bookings early for **general operations awareness**—the system does a lot, but human eyes are gold 🧐