WORKFLOW GUIDE

Safari System

Tour Operator Workflow

A practical guide to bookings, payments, notifications, controls, and reporting.

Secure access

Role-based login keeps admin, consultant, and finance workspaces separate.

Booking control

Bookings move through entry, payment, operations, completion, and reporting.

Operational alerts

Notifications highlight overdue payments, upcoming trips, deadlines, and missing assignments.

Accountability

Audit logs, activity logs, recycle bin actions, and permission controls create traceability.

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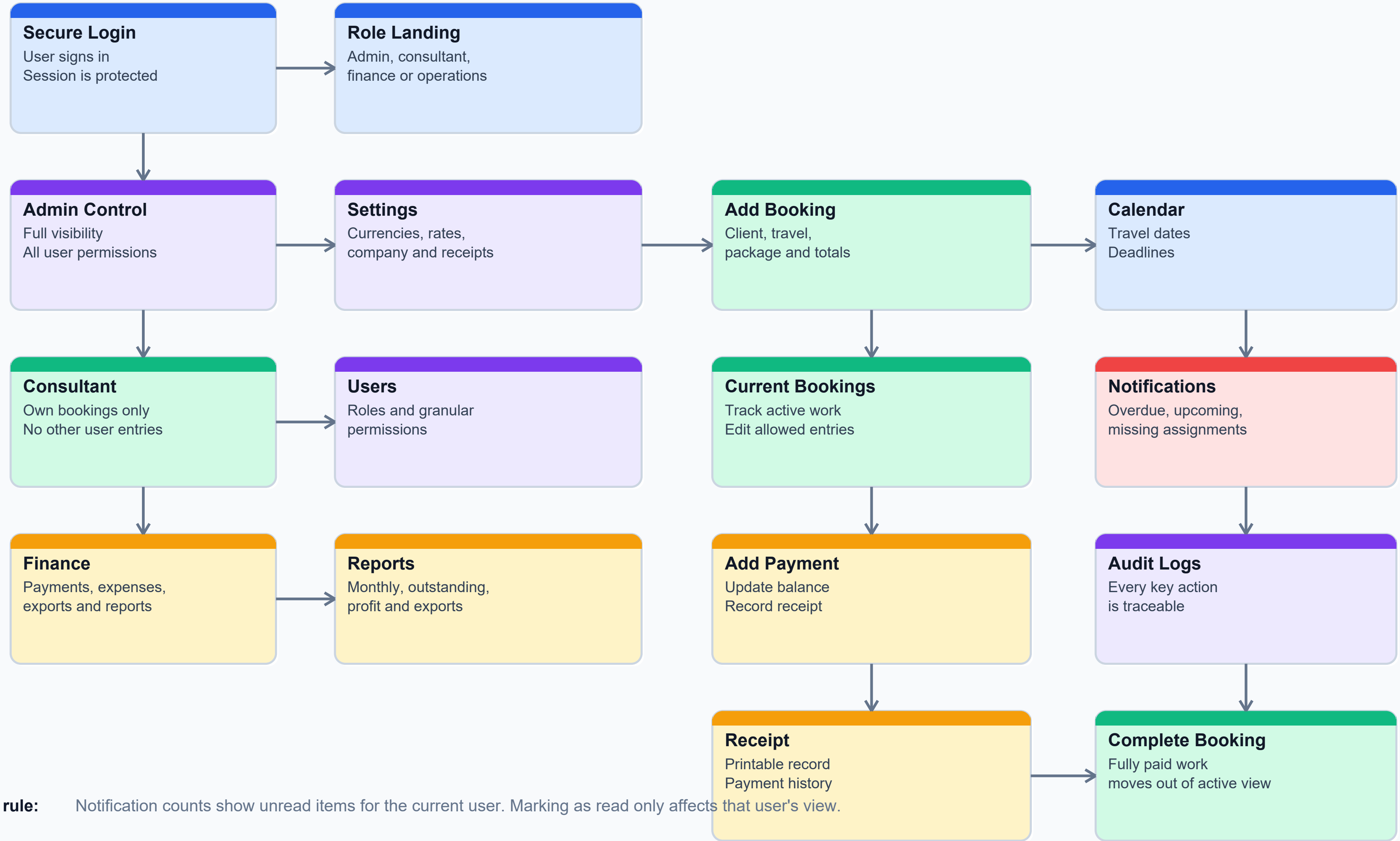
How the system moves work through the business

The map below shows the main operating paths a tour company follows inside Safari System.



Read rule: Notification counts show unread items for the current user. Marking as read only affects that user's view.

From client enquiry to completed trip

This page explains the normal path a booking follows after a consultant enters it.

1 **Create Booking**

Consultant enters client, travel date, package, amount, currency, consultant name, and operational notes.

2 **Current Booking**

The booking stays active while there is work to do or a remaining balance. Consultants only see permitted entries.

3 **Record Payment**

Payments reduce the balance, create a payment record, and allow a printable receipt to be issued.

4 **Operations**

Driver, vehicle, deadlines, calendar dates, and missing assignments are tracked for execution.

5 **Notifications**

Overdue balances, upcoming trips, missing assignments, deleted/restored bookings, and deadlines appear as unread alerts.

6 **Completion**

Once the booking is fully paid and complete, it can move away from the consultant's active workload.

7 **Reports**

Admin and finance review monthly totals, outstanding balances, consultant performance, exports, and profit reports.

What each user type does

Use this as a quick explanation when introducing the system to a manager, consultant, accountant, or operations lead.

Area	Primary user	Main purpose	Key output
Admin	Business owner or manager	Controls settings, users, permissions, company details, booking statuses, exchange rates, and backups.	Secure system governance and full visibility.
Consultant	Sales or reservations team	Creates bookings, manages own active bookings, adds payments, checks calendar, and handles notifications.	Clean booking workload without access to another consultant's entries.
Finance	Accountant or finance officer	Reviews payments, expenses, receipts, exports, outstanding balances, and profit reports.	Accurate financial tracking and downloadable CSV records.
Operations	Operations manager or admin	Tracks travel dates, driver and vehicle assignments, deadlines, and incomplete operational details.	Fewer missed trip tasks and clearer execution follow-up.
Notifications	All permitted users	Shows overdue payments, upcoming trips, missing assignments, recent delete and restore actions, and deadlines.	Actionable unread alerts with mark-as-read control.
Logs	Admin	Captures activity logs, audit logs, recycle bin actions, payment actions, and settings changes.	Traceability for who did what and when.

Recommended next upgrade

Add a booking timeline and checklist so every booking shows its full history, pending tasks, documents required, operational confirmations, and completion status in one place.